

# User Guide: Engineer



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## Introduction

Welcome to ELMS, the Electronic Logbook Management System. ELMS provides a comprehensive platform for recording and evaluating competence, training and experience information. This user guide provides information on specific functionality available to a user with an **'Engineer'** role assigned to them.

### The Engineer Role

Within the aviation industry, approximately 80% of all safety related incidents are attributed to Human Factors. ELMS is an industry focused tool, designed to help businesses and maintenance personnel enhance safety and quality by building a clearer picture of competence.

Globally, the industry and regulators are moving towards performance-based regulation, which places greater emphasis on organisations proving how they manage safety and places competence centre-stage. This means that we will see far greater responsibility on the entire industry having to demonstrate competence.

Your personal ELMS Profile is essentially a powerful CV that you can build up and take with you throughout your career.

You have the ability to upload and store all of your training records, work experience, licence details, aircraft type ratings and any authorisations/approvals issued by other organisations. All organisations involved in the maintenance of aircraft are now required to evaluate and demonstrate personnel competence based, in part, on validated work experience records. (Pg.34 EASA Part 145 AMC 1 145.A.30(e)) As an engineer, you therefore have an obligation to provide a validated record of your experience, in an acceptable form, that allows organisations to accurately evaluate your competence.

ELMS provides you with a platform to easily record your experience in the form of a digital logbook. You can record your tasks and submit them to an authorised individual for validation.

By using ELMS you will be building up a record of your competence that will prove extremely valuable as more and more organisations ask for evidence. Whenever you join a new organisation, wherever you are in the world, you will be able to provide evidence to demonstrate your competence and experience."

# Chapter 1: Registration

There are two different methods by which you can activate your ELMS subscription:

1. Purchasing your own account through PayPal
2. Redeeming a company issued Subscription Key

## Creating Your Account by Purchasing via PayPal

Visit [www.elmsaviation.co.uk](http://www.elmsaviation.co.uk) and click '**REGISTER**' at the top of the home page. This will take you to the application's registration page. Enter your '**Email Address**'.

**Note:** The email address you provide is the one to which your system notifications will be sent, it is important that you ensure that it is one you can access easily.

Create a unique password. The password must contain a minimum of one capital letter, one lower case letter, one number and one special character [^\$£^%] and must be 6 characters, or more in length.

**Example: Password1%**

Click '**CREATE ACCOUNT**'.

An automated email will be sent, asking you to verify your email address. Click on the '**VERIFY**' link, within the email. This will take you back to the application sign in page where you can sign in using the details you just created and continue setting up your account.

## Payment & Activation

Once you have created your account and verified your email address, as per the steps above, visit [www.elmsaviation.co.uk](http://www.elmsaviation.co.uk) and select '**LOGIN**' at the top of the home page. Enter the email address and password, you created during initial registration. Then take the following steps to complete the account registration process:

### Step 1: Personal Details:

To complete registration you will be asked to fill out some personal details, these will form part of your personal profile and can be edited at any time. (See: *Chapter 2 'Completing your profile', 'Editing your Personal Profile'*)

### Step 2: Terms & Conditions:

Please read and accept the Terms & Conditions and Terms of Use, and select your marketing preferences.

### Step 3: Payment OR Subscription Key Redemption

When you reach the Payment section of the registration process you have 2 available options:

#### Subscription Key Redemption

If you have been issued with a subscription key by your company, enter the Subscription Key in the 'Redeem Key' free text field. The Subscription Key is a 32 digit, alphanumeric character string.

Example: **CEE24D37-D118-490B-8C62-6FA063719291**

Once a valid Subscription Key has been entered, a '**REDEEM KEY**' button will appear. Click on this to complete your registration and account activation. The next step is to start filling out your Profile information.

#### Making Payment

If you have not been issued with a Subscription Key, select your payment plan and proceed through the payment engine to complete your subscription. If you have a Voucher Code, enter this in the free text box provided and click on '**APPLY CODE**' to claim the discount.

If you don't have a PayPal account, use the 'Check Out as Guest' button.

## Chapter 2: Completing Your Profile

### Supporting Documents

It is useful, although not essential, to have the following documents ready in a format that can be uploaded to the ELMS application. This will allow you to fully complete your profile.

- Copy of your passport
- Copy of your driving Licence
- Education qualifications and certificates
- Training qualifications and certificates
- Part 66 Licence
- Previous company authorisations
- Employment history and references

**Note:** You can edit your profile and upload documents at any time. If you don't have the documents to hand, it will not stop you from creating your account. Simply upload them later.

### Uploading Documents

The first time you select the **'Upload'** button, there will be a request to accept the ELMS' terms and conditions regarding storage of documents. Select **'Yes'** to continue with the upload. This is shown in Figure 1 below.

You can upload scans, photographs or documents from your computer where you are required to upload supporting information.

The file previewer supports the following formats: JPEG, PNG or PDF.

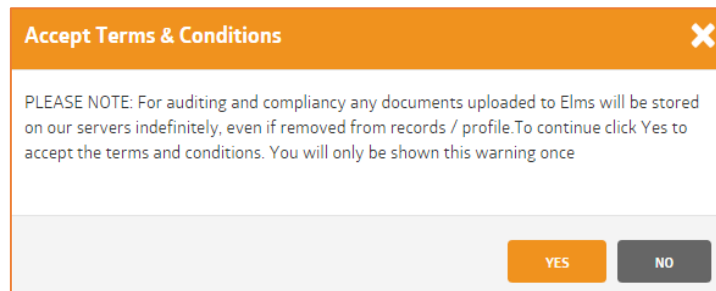


Figure 1 – Accepting T&Cs

**Note:** Documents are limited to a 32MB size limit.

### Step 1: Additional Personal Details:

Enter **'Emergency Contact Details'**, **'Passport details'** if applicable, **'Driving Licence'** if applicable, and any **'Occupational Health Checks'**.

**Note:** For anyone with dual nationality more than one set of passport details can be added.

### Step 2: Education:

Enter all your **'Education'** and **'Apprenticeship'** history, if applicable.

**Note:** Clicking on the date picker widget opens the current month and year. To display an earlier date, click the month at the top to open a current year calendar view then click the year at the top to display years, you then use the < > arrows at the top to quickly move forward or back in years. See our Quick Guide **'Using the Date Picker Widget'** for more information.

### Step 3: Job Roles:

There are four **'Job Roles'** available:

- 'Engineering Support'
- 'Non-Licensed Engineer'
- 'Licensed Engineer'
- 'NDT'

When you select a 'Job Role' a section will open with a variety of related roles. Tick only the roles that apply to the work you regularly carry out. These can be updated at any time if your role changes or develops.

#### Step 4: Training:

Enter all the details of your training history. If some of these sections don't apply to you, just use the 'N/A' tick box and move onto the next section.

- 'EWIS Training': Please enter all your training information and upload supporting documents as required, then select 'SAVE' to enter those details into the ELMS system. More than one target group can be selected at a time if all the other details, such as Issue date, are that of the same date. Otherwise repeat for each target group.
- 'FTS/SFAR88 Training': Select either Phase 1, Phase 2 or Combined and complete as above.
- 'HF Training': Select either Initial or Refresher and complete as above. You **must** enter the details of the Initial course you completed and the details of your current Refresher course.
- 'Health & Safety': Complete as above. This can be repeated depending on what additional courses have been completed.
- 'EASA Part 66 Examination Module': Complete as above. This can be repeated depending on the number of 'Modules' that apply.
- 'Aircraft Type Training': Complete as above.
- 'Category a Task Training': Complete as above. This can be repeated depending on the number of 'Tasks' you have been trained on.
- 'NDT Training': Complete as above. This can be repeated depending on the number of NDT levels that apply.
- 'Other Training': Complete as above. This can be repeated depending on the amount of training that applies.

The following need to be uploaded by a company assigned QA user:

- 'Induction Training'
- 'Company Competency Assessment'
- 'Continuation Training'

Once these have been uploaded, you will be able to view these as 'Read Only' files.

#### Step 5: Licence and Company Authorisations:

Enter all of your Licences Details, Sub Categories, Type Ratings and Company Authorisations as well as uploading any supporting documents. These are crucial for entering licence based experience records. You can only enter Company Authorisations for **previous** companies. The QA user for the company you currently have a Handshake with will need to enter their Company Authorisations.

**Note:** If the details entered in Steps 3, 4 or 5 are not complete it may prevent you from adding experience records.

#### Step 6: Employment History:

Enter all the details of your 'Current' and 'Previous Employment' and upload any 'References' or 'Testimonials' you have to support your employment history. Although references are not essential for your profile some reports will look for them so it is recommended that you obtain at least three.

## Step 7: Summary:

Once you have gone through the profile wizard you will be presented with a summary screen showing you how much information you have entered.

Each section of your profile is represented by a bar, as shown below.

- **Green** indicates all details are complete
- **Amber** indicates an item is flagged as not applicable or missing information, such as a document or upload
- **Red** indicates a section is incomplete. As shown in *Figure 2* below

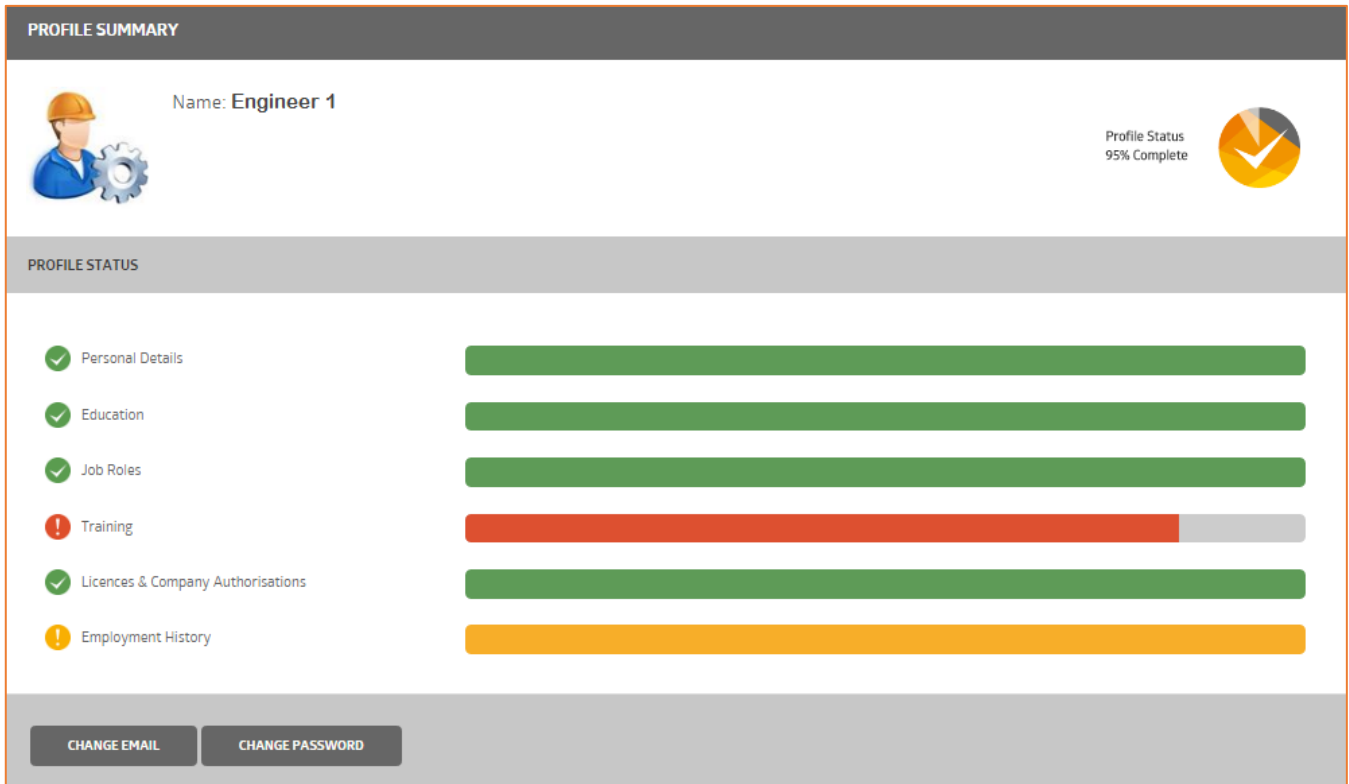


Figure 2: Profile summary

## Missing profile information

Clicking on the icons, to the left of the section name, will display a list of the missing items. See *Figure 3* on page nine of this user guide. This example shows that the Training and Employment History sections have missing/expired items and what those items are. Clicking on a section title will open the relevant page, so you can view or enter in the missing information. Once these items have been added/amended the bar will turn **green**. See *Figure 4*.





Figure 3: Missing profile information



Figure 4: Profile summary, information complete.

## Editing Your Personal Profile

You can return to edit your personal profile information at any time to ensure the details are kept up-to-date.

Go to **'PERSONAL PROFILE'** via the left-hand side menu. This contains the links to the pages to edit your personal information that you provided during registration above. In addition to the personal profile you also have access to view;

- Company Competencies
- Company Assessments

Click on any of these headings to open the page details for viewing Competencies and Assessments that your Organisation has allocated to your profile. These can only be viewed by the issuing Organisation Managers and QA users, as well as yourself.

They will not appear to other Handshake connected organisations.

## Chapter 3: Dashboard Alerts and Notifications

The dashboard area allows you to quickly view any pending alerts.

The numbers across the centre of the dashboard indicates the number of items related to each heading. See *Figure 5* below. Clicking on the number will take you to the list of alerts or tasks under that heading.

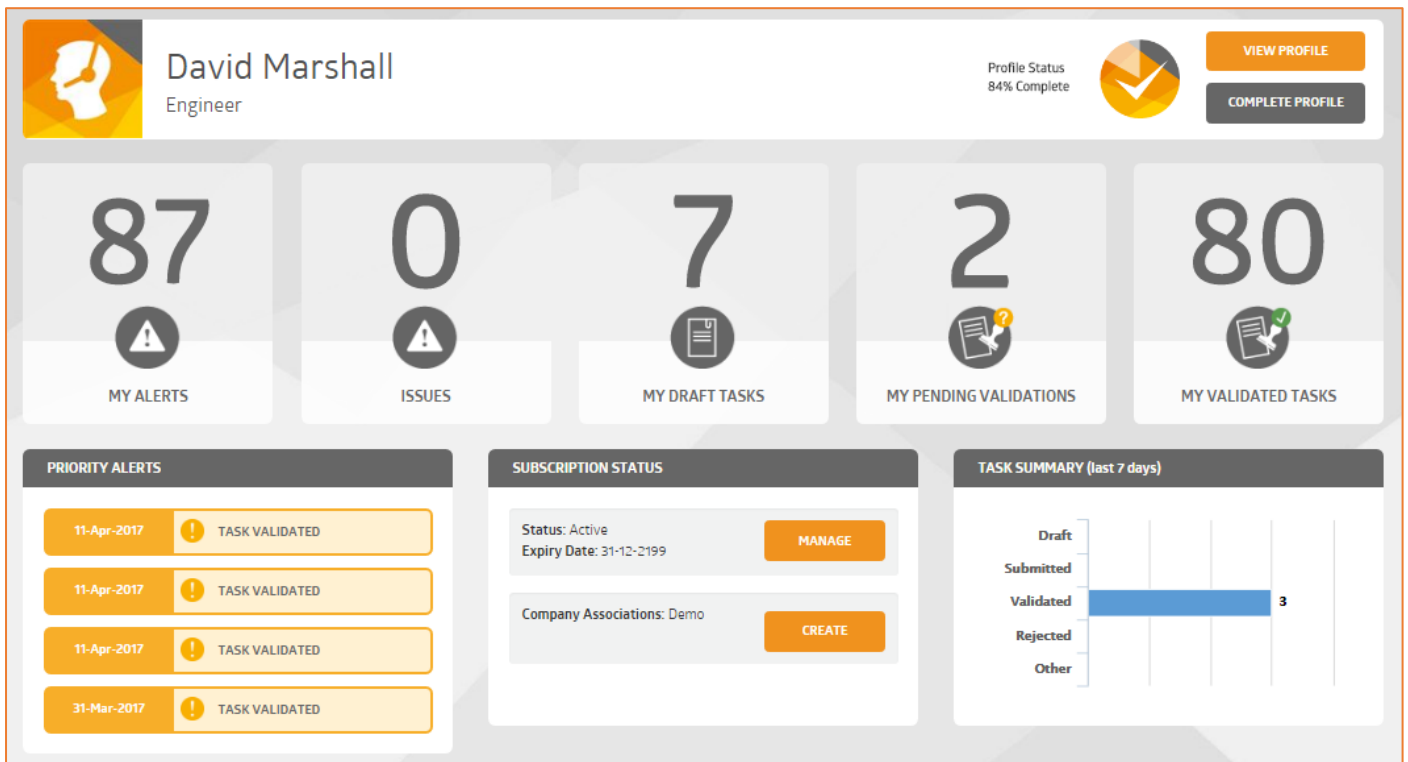


Figure 5: Dashboard screen

### Alerts and Priority Alerts

The **'My Alerts'** box displays all your system notifications. Select **'My Alerts'** from the dashboard for the full list of system notifications to be displayed, along with the options to **'VIEW'** or **'DELETE'**. These will include alerts such as expiring profile items, task validation alerts and subscription information.

The **'DELETE'** button also acts as an archive button and, by ticking the **'Show Inactive'** tick box at the top right of the screen, all notifications including those previously deleted, will be displayed.

**'PRIORITY ALERTS'** displays the four most recent alerts for your attention. Selecting an alert from this list takes you directly to that notification.

### Issues

Issues are alerts raised by the Quality Assurance (QA) department. **Example:** If a task submitted for validation has been rejected 3 times, the task will get referred to the QA department. A QA permission holder will then further investigate the task and the information regarding the investigation will appear in your alerts. These can also be viewed by selecting **'My QA Issues'** from the **'QA ISSUES'** section of the left-hand menu.

### My Draft Tasks

Displays a list of any tasks you have saved as a draft. You can go back to these tasks to complete them and submit them for validation. There are also the options to delete, edit, add related task and view the task audit.

### My Pending Validations

Displays a list of any submitted tasks that are awaiting validation/actioning.

### My Validated Tasks

Display a list of any tasks that you have had validated.

### Subscription Status

This displays your ELMS Account Subscription Status. This can either be '**Active**' or '**Expired**' and will also include the expiry date. However, if you have been issued with a Subscription Key from an ELMS registered organisation, this will expire when the organisation's account expires. Selecting the '**MANAGE**' button will display your subscription details, any company keys you may have redeemed and their expiry dates. There is also an '**UPGRADE OR RENEW SUBSCRIPTION**' button which will take you to the payment page, to select the plan you require.

### Company Associations

Displays a list of all the companies you have a Handshake connection with.

You can also request a new Handshake by selecting the '**CREATE**' button. See: *Chapter 4: Handshakes and High-5's* for more information)

### Task Summary (last 7 days)

This is a graphical display of the number of Tasks entered in '**Drafts**', '**Submitted**', '**Validated**', '**Rejected**' and '**Other**' (such as withdrawn) in the previous seven days.

## Chapter 4: Handshakes and High-5' s

### Handshake Connections

The Handshake connection forms an indefinite link between your account and an ELMS registered organisation. The connection can be requested by either party but cannot be actioned unless both parties consent. The Handshake allows an Organisation to view your competence related data and allows you to add tasks related to that organisation. For more information, please see our infographic on 'Profile & Connections'

### Viewing your Handshake Connections

Go to '**PERSONAL PROFILE**' on the left-hand menu and click '**My Handshakes**'. This displays a list of the Handshake Connections you have in place, who they were initiated by, and the date they are active from.

### Creating a Handshake Connection

Go to '**PERSONAL PROFILE**' on the left-hand side menu and click '**My Handshakes**', and the '**CREATE HANDSHAKE**' button. See *Figure 6* below.

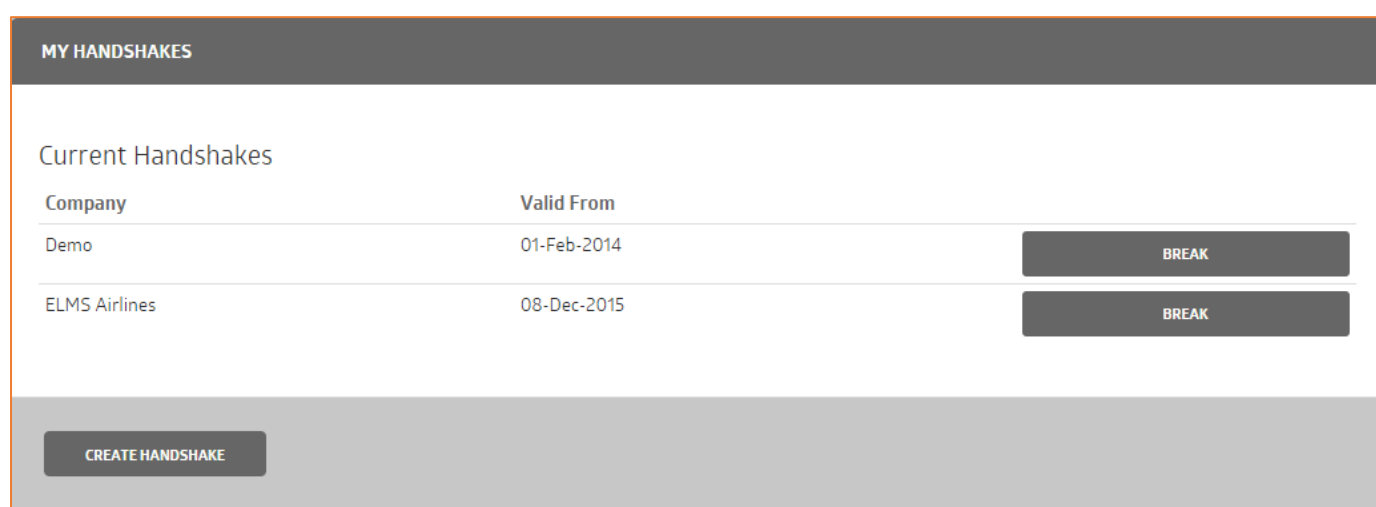


Figure 6: My Handshakes screen.

Select the Organisation you wish to make the connection with from the dropdown box and select '**SUBMIT**'. Once the Organisation has accepted the connection you will receive a notification and an email confirming this.

Only users with a paid subscription or having been issued with a '**FULL**' Subscription Key (issued by an organisation) can create Handshakes with other Organisations on ELMS.

**Note:** Both parties must consent to the connection for the Handshake to be formed.

### Accepting a Handshake Request

You will receive an email notification as well as a notification on your dashboard if an ELMS Organisation has requested a Handshake with you.

Click the notification to view more details about the Handshake request and decide whether you want to '**Accept**' or '**Decline**'.

### Removing a Handshake Connection

Visit the '**PERSONAL PROFILE**' page, found on the left-hand menu and click '**My Handshakes**'. Select '**BREAK**' next to the Organisation you wish to remove the connection with.

Both parties will receive notification that the connection has been broken.

## High-5 Connections

High-5 connections are a short-term link allowing assigned individuals within an Organisation to evaluate and view the profile, task history and competence of an ELMS user with a solo subscription or a 'Full' corporate subscription key. The High-5 allows an organisation access to view your profile and competence related data (plus selected management reports) for a set period controlled by the individual being assessed. For more information, please see our infographic on '*Profile & Connections*'

## Viewing your High-5 Connections

Go to '**PERSONAL PROFILE**' on the left-hand menu and click '**My High-5s**'. This displays a list of the High-5 Connections you have in place, who they were initiated by and the dates they are active from/expire on.

## Creating a High-5 Connection

Go to '**PERSONAL PROFILE**', '**My High-5s**' as per above and select '**CREATE HIGH-5**'. If you select '**Organisation**' from the tick boxes at the top, use the drop-down menu to select an ELMS Organisation. If you choose '**ELMS User**', enter the users' ELMS affiliated email address. (ELMS username).

Next choose the '**Duration**' you wish them to have visibility for. The duration options are: '**24 Hours**', '**One Week**', '**Two Weeks**' or '**Custom**' (where you can enter a custom time period).

Next choose the '**Visibility Level**'. This can be set to can be set to '**Full**' or '**Limited**'.

- '**Full**': This option allows the Organisation/User to view your entire profile details and tasks, as well as granting functionality to include you in their experience based assessment reports.
- '**Limited**': This option is similar to the above, however there is a restriction on viewing personal data. Only your name, address and contact number will be visible. The following will not be able to be viewed when granting a limited High-5:
  - Emergency Contacts
  - Passport Details
  - Driving Licence
  - Occupational Health Checks

In addition to the above, any attachments in your profile will also not be able to be visible under the terms of a limited High-5.

When you select '**SUBMIT**', a pop up box will confirm the visibility of the High-5 and that it has been sent to the Organisation/User. They will receive an email alert and a notification on their dashboard telling them that they have been granted a High-5 and who it is from. The receiving party will then have immediate access to the data that you have granted.

## Accepting a High-5 Request

An Organisation or User can request a High-5 to access your profile information and experience records. An email notification will be sent to you and a notification will appear on your dashboard. When you receive a request, you can set the '**Duration**' and '**Visibility Level**' of your profile in the same way that you create a High-5 connection.

## Chapter 5: Building Your Experience Record

Adding completed tasks to your Experience Record and having them validated is a key function of the ELMS System and is a core component of the EASA Part 145 competence requirements. Additionally, your experience logbook is a measurable component that will enable organisations to get a real sense of the depth of your experience.

Go to **'EXPERIENCE RECORD'** then **'Add a Task'** via the left-hand side menu as seen in *Figure 7* below.

The screenshot shows the 'ADD TASK' interface. At the top, there are 'From:' and 'To:' date pickers. Below this is a section for 'Organisation' with radio buttons for 'My Organisations', 'ELMS Organisations', and 'Other', and a dropdown menu. This is followed by text input fields for 'Aircraft Operator', 'Aircraft Type', and 'Aircraft Reg'. Another section has radio buttons for 'Job Number' and 'Tech Log Page' above a text input field. Below that is a 'Maintenance Type' dropdown. The 'Activity Types' section contains two columns of checkboxes: 'Changing component', 'Modifying', 'Releasing aircraft to service', 'Servicing', 'Troubleshooting', 'Inspection', 'Operational and functional testing', 'Repairing', and 'Supervising these Maintenance Activities'. Further down are 'Category' and 'Role / Method' dropdowns, 'Manual Type' dropdown, and 'Manual Part' text input. Below these are 'ATA Chapter', 'SubChapter', and 'Subject' text inputs, and 'Hours Worked' text input. A 'Task Summary' section has a large text area with the placeholder 'Add a summary'. At the bottom left, there is an 'Attachments (0 pending)' section with an 'UPLOAD' button and a text area with the placeholder 'Press upload to attach documents or images'. A large orange 'NEXT' button is at the bottom right.

Figure 7: Add task screen

## ELMS Guidelines

Each task uploaded within the system must be validated in order to add to your individual and organisational competence scores. Users have the ability to 'Manually Validate' tasks in order to demonstrate previous experience, although in typical day to day use, 'Organisational Validation' should take place. This occurs when a user submits their experience record to a company appointed Validator for validation.

ELMS recommends, as a matter of best practice, that tasks are submitted to a validator who was the direct supervisor or line manager of the person submitting the task.

A couple of things you need to know about the validation process:

- Only those users assigned a "Validator" permission by the Organisation Company Admin (CA) have the authority to validate tasks
- Each Validator needs to be assigned a Validator Stamp in order to successfully validate. ELMS recommend that the Validator Stamp is the same as the users Company Authorisation Stamp Number.
- Only Validators that have the correct training, qualifications and authorisations for the task being submitted, will appear in the list of validators.
- Ideally a user would select their direct supervisor from the list of Validators to submit their tasks to for validation.
- It is the organisations control as to who they make validators and ELMS recommend that full and regular use of the "Validation Summary Report" to assess the validation process is working well. i.e the validators are keeping up to date with their validations, that they aren't being inundated with requests.

## Adding Tasks to your Experience Record

Click the **date picker widget** to enter the task '**From**' and '**To**' dates. (See our Quick Guide '**Using the Date Picker Widget**' for more information on this)

- Use the drop-down menu to pick the '**Organisation**' that the task was carried out for.
- If you do not have a Handshake with an Organisation, but they are using ELMS, you will need to choose '**ELMS organisations**'.
- '**Other**' can be used for Manual Validation. (See '*Manual Validation - Quick Guide*')
- Enter the '**Aircraft Operator**'
- Enter '**Aircraft Type**' - *Not mandatory when adding a Workshop, Part M or Maintenance Support task.*
- Enter the '**Aircraft Reg**' - *Not mandatory when adding a Workshop, Part M or Maintenance Support task*
- Enter '**Job Number**' or '**Tech Log Page**' – Use the radio button to toggle between the two
- Select '**Base**', '**Line**', '**Workshop**', '**Part M**' or '**Maintenance Support**' from '**Maintenance Type**' drop down menu.

If you select either '**Base, Line, or Workshop**' then proceed as follows:

- Tick the '**Activity Types**' associated with this particular task.
- '**Category**' will be automatically populated.
- Select the relevant '**Role/Method**' from the drop-down menu.
- Select '**Manual Type**' from the drop-down menu.
- Enter '**ATA chapter**', '**Sub Chapter**' and '**Subject**'. - if applicable.

If you select either '**Part M or Maintenance Support**' then proceed as follows:

- '**Category**' will be populated with **Engineering Support**.
- Select the relevant '**Role/Method**' from the drop-down menu.
- Enter '**ATA chapter**' if applicable.
- Choose your '**Task Title**' from the list of drop downs. A second drop down might appear labelled **Task Details**. This gives the option to drill down further, if needed, and pick a **Task Detail** which is specific to your organisation. The Company Administrator for organisations can add **Task Details** to the system.



Once you have completed the above, to finalise the completion of an experience record, follow the below steps:

- Enter **'Hours Worked'** - Round up or down, do not use decimal points.
- Enter **'Task Summary'** - A brief description of how you carried out the task. The Task Summary doubles up as the title of your task. Include words you may want to search for in the future and also to aid the Validator when they review your task details.
- Next click **'UPLOAD'** to attach any supporting document(s). Uploading a document is not mandatory but it is recommended to aid the Validator. Documents to upload include: stamped or signed job card, pictures of the work or any other supporting documents relating to the task.
- Click the **'NEXT'** button at the bottom right. Review the information entered.
- Clicking **'EDIT'** to make any changes if required, and then by use the **'Save Task'** button.

You may receive a 'Warning' pop-up box, see Figure 8, if the task you are attempting to save does not match your personal profile. The warning will identify the reason if this is the case. Until this is corrected you will not be able to submit the task for validation. The task can be saved in draft status until the correction has been made. Selecting **'YES'** will save the task as a draft, **'NO'** will allow you to make any edits, if you have made a mistake, to the task entry.

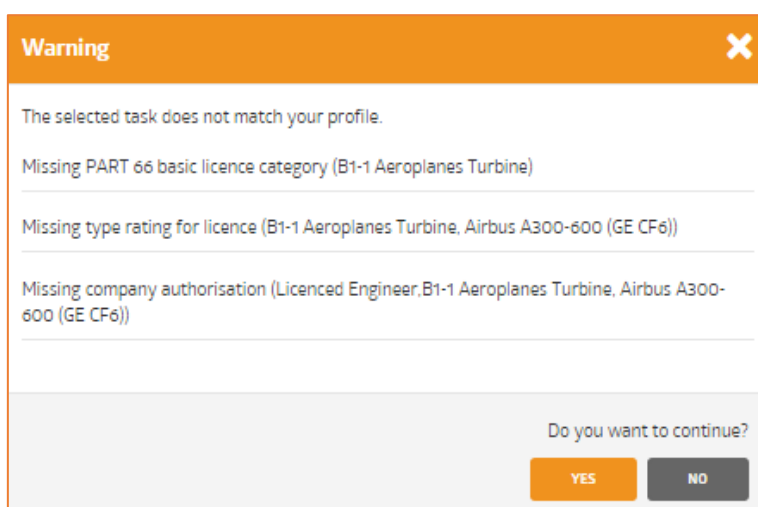


Figure 8: EXAMPLE: Warning message, received if your task details do not match your training and qualifications

If the task matches your personal profile and you can submit, you will get a task summary screen upon a successful save. This gives you the chance to review all the information you have entered and ensure the experience record is as accurate as possible. This will ensure that your task is validated successfully and that data integrity is maintained.

- Click **'EDIT'** if there is anything you need to alter.
- Click **'SAVE'** at the bottom of the screen to continue.

You will then see a screen such as Figure 9 where you have additional options available.

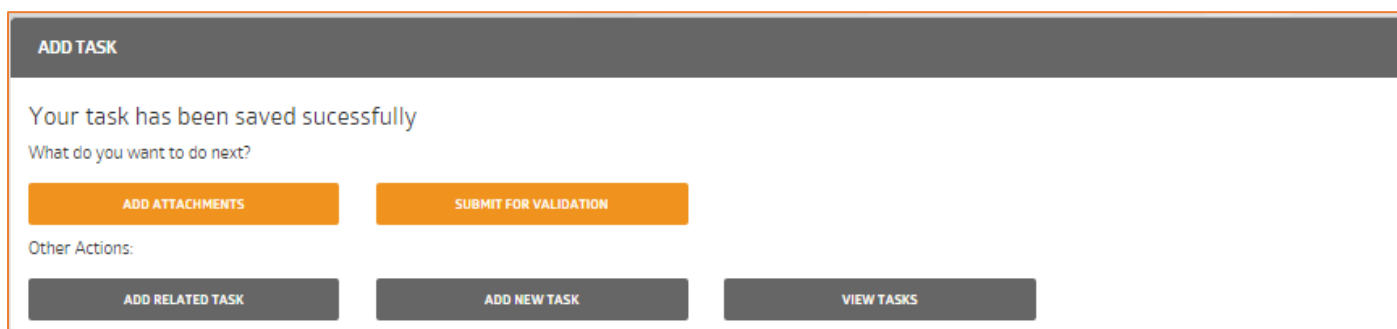


Figure 9: Submit for Validation screen



- **'ADD ATTACHMENTS'**: Click to add further supporting documents to your record.
- **'SUBMIT FOR VALIDATION'**: Submits task for Validation and opens a drop-down list of potential Validators to select from.
- **'ADD RELATED TASK'**: A quick way to add another similar or related task. For example, if you carried out another similar task on the same aircraft. Much of the **'Add Task'** page prepopulates for you.
- **'ADD NEW TASK'**: Takes you to the **'Add Task'** page to start adding a completely new record.
- **'VIEW TASKS'**: Displays an entire list of your task records, regardless of their state.

### Submitting a Task for Validation

When you have created, and saved an experience record, you have the option to **'SUBMIT FOR VALIDATION'**, as shown in *Figure 9* above.

Click **'SUBMIT FOR VALIDATION'** and select a Validator from the drop-down list to validate the task, the system will automatically list only the Validators for the Organisation you completed the task for, who have the appropriate authorisations, licences and job roles.

When you select your validator, the system then does a further to check on your task list to see if there are any other draft tasks that can be submitted to the same validator. These will be listed and can be ticked and submitted at the same time.

**Note:** Please contact your Company Administrator immediately if you see the warning: **'No validators can be found'** – This means that no one at your Organisation currently matches your tasks criteria to Validate.

You have the option to view the task details again before submitting. When you are ready, select the orange "SUBMIT FOR VALIDATION" button. A pop up box will confirm the action has been completed - click **'OK'**. A notification and a **'Validation Request'** email will be sent to the Validator listing the task details and giving them the opportunity to view, audit and potentially validate the task.

**Note:** There is a limit to the number of tasks you can submit per day. This is set by your Company Administrator. Get in touch with them for additional information.

### Manual Validation

If the Organisation you are working at does not have an ELMS account, you can still Validate the tasks you wish to add to your experience record via Manual Validation.

Follow *'Adding Tasks to your Experience Record'*, as above, but select **'Other'** from the tick boxes at the top of the page and enter the name of the Organisation at which you completed the task in the free text box.

When manually validating a task, it is essential that you upload supporting documentation to provide evidence that you completed the task.

A form is available to download from the ELMS website, this needs to be completed with all the task details and stamped by your Supervisor. Alternatively uploading an image of your stamped logbook or job card would also be acceptable.

After completing the **'Add Task'** form **'SAVE'** it and then go to **'View Tasks'**. Select the task from the list, there is now the option to **'MANUALLY VALIDATE'** at the bottom of the task summary screen. Manually Validated tasks are highlighted in any reports run on your records, so the person running the report has the option to include/discard them in their assessment. They also have a different icon.

**Note:** For more information about manual validation, please see the relevant user guide.

## Task Icons

Each task will have a 'state'. These are shown within the task summary in addition to a coloured icon next to the title of the task. These are shown in Table 1 below.






Task saved as draft	
Task submitted	
Task withdrawn	
Task validated	
Task rejected	
Task manually validated	
Task timed out	
Alert, item requires attention	
Reminder alert, additional information required.	

Table 1.

**Note:** Once a task has been validated it cannot be deleted from your records, so ensure the details are correct **before** submitting a task for validation.

## Editing Tasks

Go to '**EXPERIENCE RECORD**' → '**View All Tasks**'. The icon next to the task shows the status. You have the option to '**Filter/Sort**' so you can organise your tasks. Selecting a task will produce a summary page so you can view all the task details. On '**Draft**' and '**Rejected**' tasks you can select '**EDIT**' to update any details and submit for validation.

## Task Audit

The '**TASK AUDIT**' option allows you to view the history of that task since first saved, showing every detail of when it was modified or actioned in anyway.

## Exporting Tasks

You can save your task history in a PDF format. Just choose the '**EXPORT TO PDF**' button in the top right hand side of the page when viewing the 'View All Tasks' page.

## Chapter 6: Competence Reports

As an Engineer permission holder, you have the functionality to run the application's four core competency reports, against yourself.

These include:

- General Competency
- Competency by Task
- Recency
- Competence Training

For more information about how these reports work and their use, please see the reporting User Guide called 'The Four Core Competency Reports'.

## Chapter 7: Editing Settings

### Email Preferences

You can customise how regularly you receive email notifications in the '**Email Preferences**' interface. Go to '**PERSONAL PROFILE**' → '**Email Preferences**' and use the drop-down box to select the '**Frequency**'. The options are '**Immediate**' or '**Daily**'. The '**Daily**' option groups all the emails regarding that function and sends them in a single nightly email. Select '**SAVE**' at the bottom of the screen to apply the changes.

### Change your Email Address

**'CHANGE EMAIL'** → Enter your new email address in the first text box then your current password in the second box. Select '**UPDATE**'. You will be sent a notification via email which you will need to open and click on the '**VERIFY**' link to confirm this update.

### Change Password

**'CHANGE PASSWORD'**: Enter your current password in first box, your new password in the second box and confirm it in the third box. Click '**UPDATE**'. A pop up box will confirm the password has been updated.

### Renewing your Subscription

Go to the '**SUBSCRIPTION STATUS**' section on your dashboard and select the '**MANAGE**' button to enter in a new Subscription Key or click the '**UPGRADE OR RENEW SUBSCRIPTION**' button to continue to the Payment screen. You can also access this information via '**PERSONAL PROFILE**' / '**Manage Subscriptions**'.

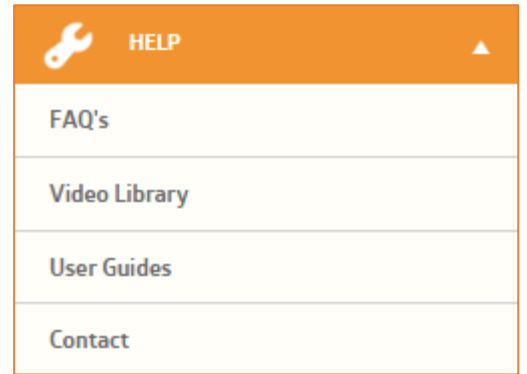
## Chapter 5: Help

### System Support

For more support and information regarding the ELMS application, please see the 'HELP' drop down in the left-hand menu once you have logged into the application.

Here you will find external links to:

- [FAQs](#)
- [Video Tutorials](#)
- [User Guides](#)
- [Contact](#)



For any further assistance please contact your organisation's ELMS Company Administrator.

Alternatively, you can speak with one of our support team by using the 'Contact' link under the help banner or by calling: 0330 100 5321

(Lines open: Monday to Friday 09.00 and 17.00 UK time; Excluding Bank Holidays).