# User Guide:

# Company Administrator (CA)


Document Ref: ELMS-QD-020. Revision: 5. Date: 04/10/2017


PREVENTING TOMORROW'S RISKS

# Table of Contents






PREVENTING TOMORROW'S RISKS

## Introduction

Welcome to ELMS, the Electronic Logbook Management System. ELMS provides a comprehensive platform for recording and evaluating competence, training and experience information.
The purpose of this document is to provide support and assistance for Company Administrator (CA) users when using the ELMS application.

## The CA Role

The role of Company Administrator (CA) controls all aspects of the Organisational account. The CA has the ability to control and define the validation and task parameters as well as creating and setting up organisational specific competencies. Part M and Maintenance Support Task Titles are also controlled by the CA.

ELMS suggest that CA permission holders act as the main point of contact for users if they have any queries or issues regarding the application.

# Chapter 1: Registration:

## Creating Your Account

If setting up your Organisational account for the first time, an ELMS Administrator will issue one user with a unique subscription key to activate your account. This will be sent via an automated email from the application.

This sole user then has the functionality to add further CA users to the Organisational account. To determine how many CA users your Organisation should have, please speak to a member of the ELMS support team.

For generic registration details and information, please see the Engineer user guide, or the 'Registration Quick Guide'.

## Uploading Documents

The first time **'Upload'** is selected, 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.

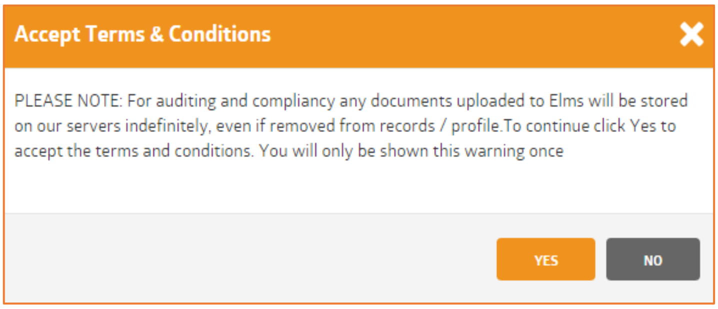



Figure 1 – Accepting T&Cs

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

# Chapter 2: Completing Your Organisation Profile

## Required Content

When creating this account, there are documents and content that need to be uploaded in order to complete the set-up process. However, some of the below may not necessarily be relevant to your Organisation.

- Registered company address
- Company primary location address
- Secondary locations & addresses
- Number of staff
- Email addresses of users to be registered on ELMS
- Stamp numbers for all Validators that will be used on ELMS
- Accountable manager information
- Primary contact details
- All company approval numbers along with their type, categories and sub categories
- Part M task details
- Maintenance support task details

Having these documents prior to registration is crucial to ensure the process can be completed effectively.

Note: Once this information is in place, you can edit this information at any time via '**Manage Organisation'**, '**View Organisation'**.

## The Organisational account is broken down into the following steps:

### Step 1: Basic Details:

Enter your Organisation's **'Registered Address', 'Primary Location', 'Number of Staff'** and any **'Sister Company Details'.**

### Step 2: Contacts:

Enter the name of the '**Accountable Manager'** and '**Primary Contact Details'** for your Organisation.

### Step 3: Company Type & Approval number:

Select your '**Company Type'** from the options and enter your '**Company's Approval Numbers**'.

### Step 4: Approval Details:

Select the **'Approval Number', 'Approval Type', 'Approval Category Type'** and the **'Approval Categories'** using the drop-down menus.

### Step 5: Complete:

Contains a link to return to your Dashboard.

## Editing Your Personal Profile

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

Go to **'Personal Profile'**, '**Personal Details'** via the left-hand side menu. This contains the following personal details you provided during registration:

- **'Name & Profile Image'**
- **'Address'**
- **'Contact Numbers'**

Click on any of these headings to open the details for editing.



PREVENTING TOMORROW'S RISKS

If you have been assigned an ‘Engineer’ permission in addition to the CA role, you will have additional functionality within the personal profile section. For more information, please see our ‘Engineer User Guide’.

## Editing Your Organisations Profile

To edit your Organisations profile, go to the left-hand menu and choose ‘**MANAGE ORGANISATION’ - ‘View Organisation’**. This opens a profile summary screen as shown in *Figure 2* below. The summary provides a quick overview of where information may be missing.

Clicking the red icon will display a list of the missing items. Clicking the section title (to the left of the bar) will take you to directly to the relevant page to enable you to fill out any the missing information. Once you have entered the relevant information, the bar will now turn green as shown in *Figure 3.*

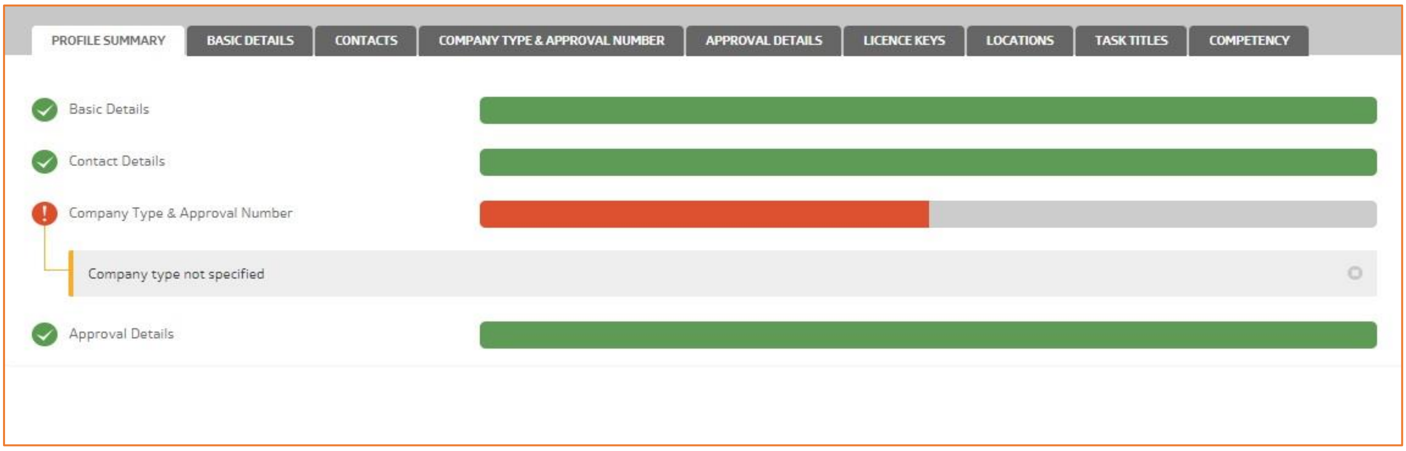



Figure 2: Profile summary showing missing information.

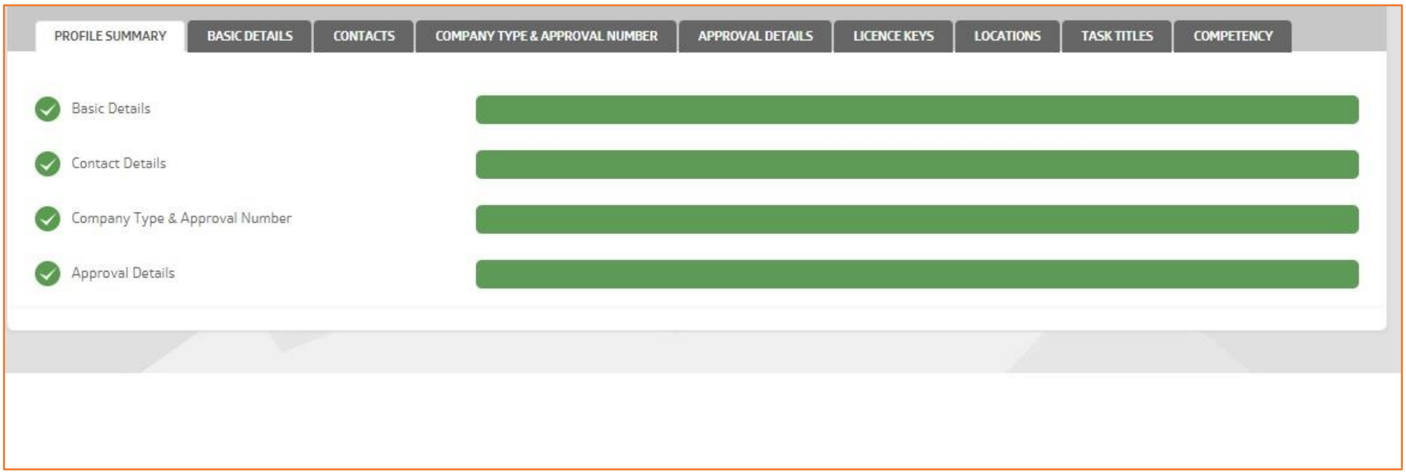



Figure 3: Profile Summary showing all information complete.

## Adding and Editing Company Locations

Select ‘**Manage Organisation’, ‘View Organisation’** from the left-hand menu. Select **‘Locations’** from the tab to **‘View’, ‘Add’** or ‘**Edit’** your Organisations locations where you have registered employees using ELMS.




ELMS® PREVENTING TOMORROW’S RISKS

# Chapter 3: Manage Organisation

Under ‘**Manage Organisation’** on the left-hand menu, the following sections are available:

- **View Organisation**
- **View Users**
    - *Permissions*
    - *View Profile*
    - *Change Location*
- **Handshakes** *(See chapter 4 below)*
- **High-5s** *(See chapter 4 below)*
- **Procedural Alerts**
- **View Settings**

## View Organisation

Clicking ‘**View Organisation’** opens the profile summary for the Organisation as shown in *Figure 4* below. Each section of the profile can be accessed by the tabs running along the top.

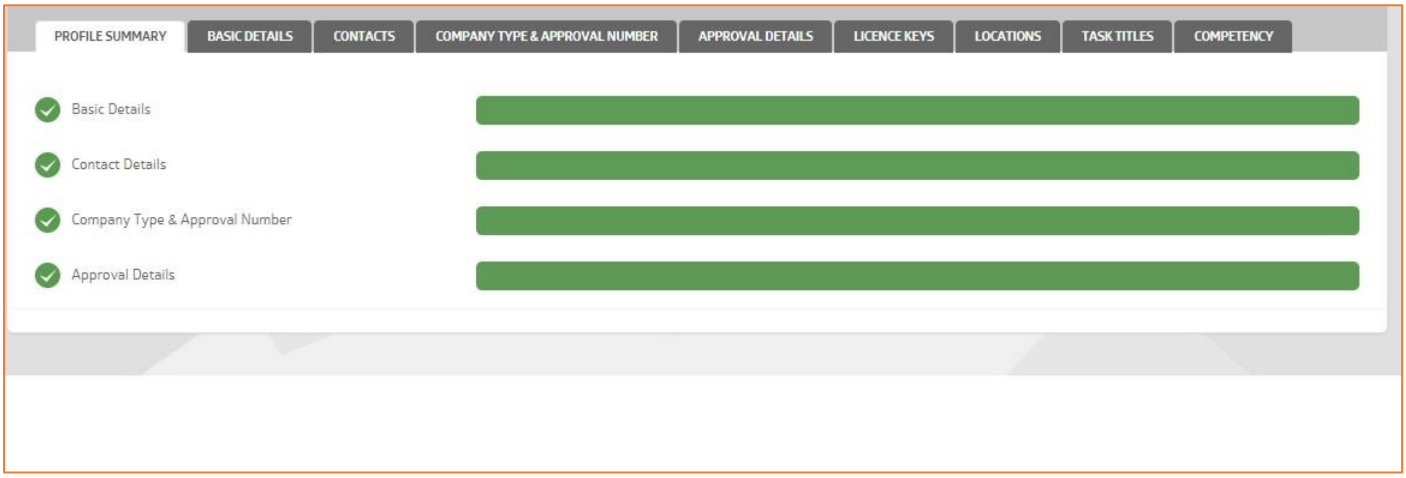



Figure 4: Organisation profile summary

**‘Basic Details’:** Displays the Organisation’s name and address details.
**‘Contacts’**: Displays the Accountable Manager’s contact information.
**‘Company Type & Approval Number’**: Lists the Company Types and Approval Numbers.
**‘Approval Details’**: Lists the Organisation’s approval details and attachments.
**‘Licence Keys’**: Gives details of the organisation’s licence key allocation. ***(See chapter 5).***
**‘Locations’**: Shows the locations and out stations for that Organisation.
**‘Task Titles’**: Displays the Task Title Details for Part M and Maintenance Support. ***(See chapter 6).***
**‘Competency’**: Allows the CA User to manage the Company Competency Definitions, Job Role Competency Definitions and Company Assessments. ***(See standalone User Guide ELMS-QD-099 which covers how to create, assign and manage these functions).***

Note: Only Company Administrator permission holders can edit the profile details of an Organisation.

## View Users

The ‘View Users’ section provides the functionality to search for any user that holds a current Handshake. You can filter by using the *First Name, Last Name* or *Email* of the user(s) that you are looking for. Alternatively leave these fields empty and search to display a list of all the users in your Organisation.

Running the query will open additional functionality and options available to you. At the top of the application page, there are two buttons that can be used to send a Notification or a Procedural Notification to an individual user, a group of users or all users. The user will receive a dashboard alert and email for a Notification, which is a free text message. A Procedural Notification is similar but requires the user to acknowledge they have received and read the Notification [Read & Sign]. There is also functionality to upload an attachment(s) to a Procedural Alert.



PREVENTING TOMORROW’S RISKS

*Figure 5* shows a similar screen to what you will see when searching for users.

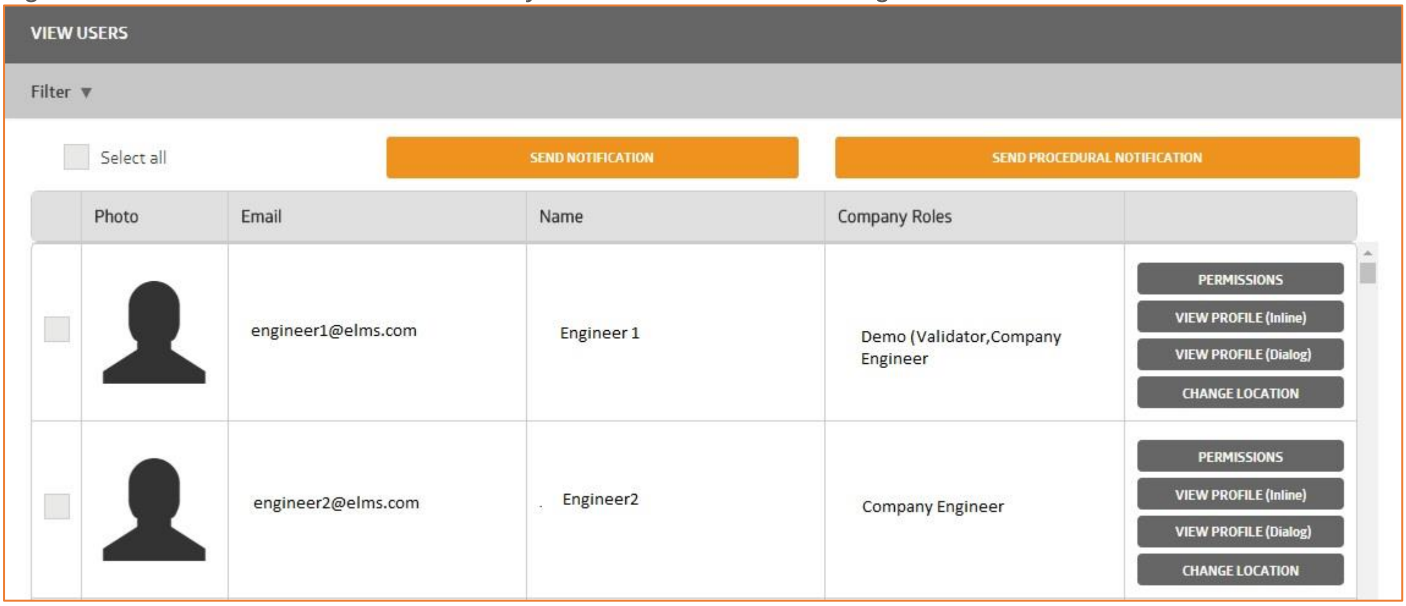



Figure 5: Viewing an Organisations users.

## Assigning Permissions

To edit a user's permission level, find the individual and click '**Permissions**' next to the user you wish to edit. This will produce a pop-up box as shown in *Figure 6* below.

Select the roles to that you wish to assign then click **'Apply'** to make the changes. The user will receive a notification of this update.

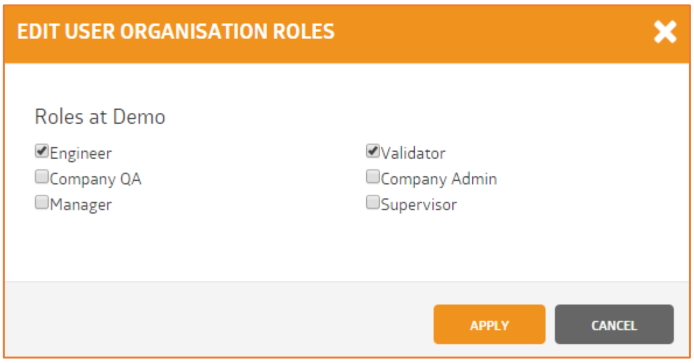



Figure 6: Editing user permission roles.

## Changing Locations

To edit a user's Location, find the individual and click '**Location'** next to the user you wish to edit. This will produce a pop-up box as shown in *Figure 7* below.
Select the new location and the users start date to that you wish to assign the user to and click **'Save'** to make the changes.



PREVENTING TOMORROW'S RISKS

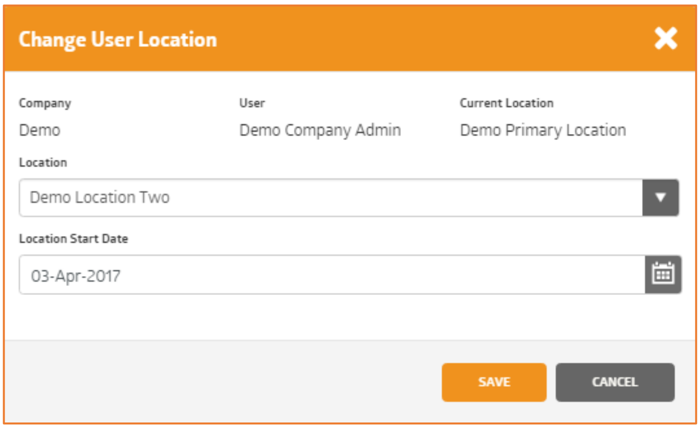


Figure 7: Editing user permission roles.

## View Settings

Under this heading there are two tabs, **‘Settings’** and **‘Job Category to ATA Chapters’.**

**‘<u>Settings</u>’**

Here the CA user has the ability to adjust all the settings in relation to the following headings. See *Figure 8.*

- **Validation**
- **Reporting**
- **Profile Alerts**
- **Tasks**
- **Handshakes**
- **General**
- **Organisational Expiry**

Editing these settings define how the application is used on a daily basis within your Organisation. This page acts as the control panel to determine the timescales and daily parameters for when experience records can be Validated as well as regulating when reporting and notifications are sent. If you have any queries about this page or require recommendations, always contact ELMS support.

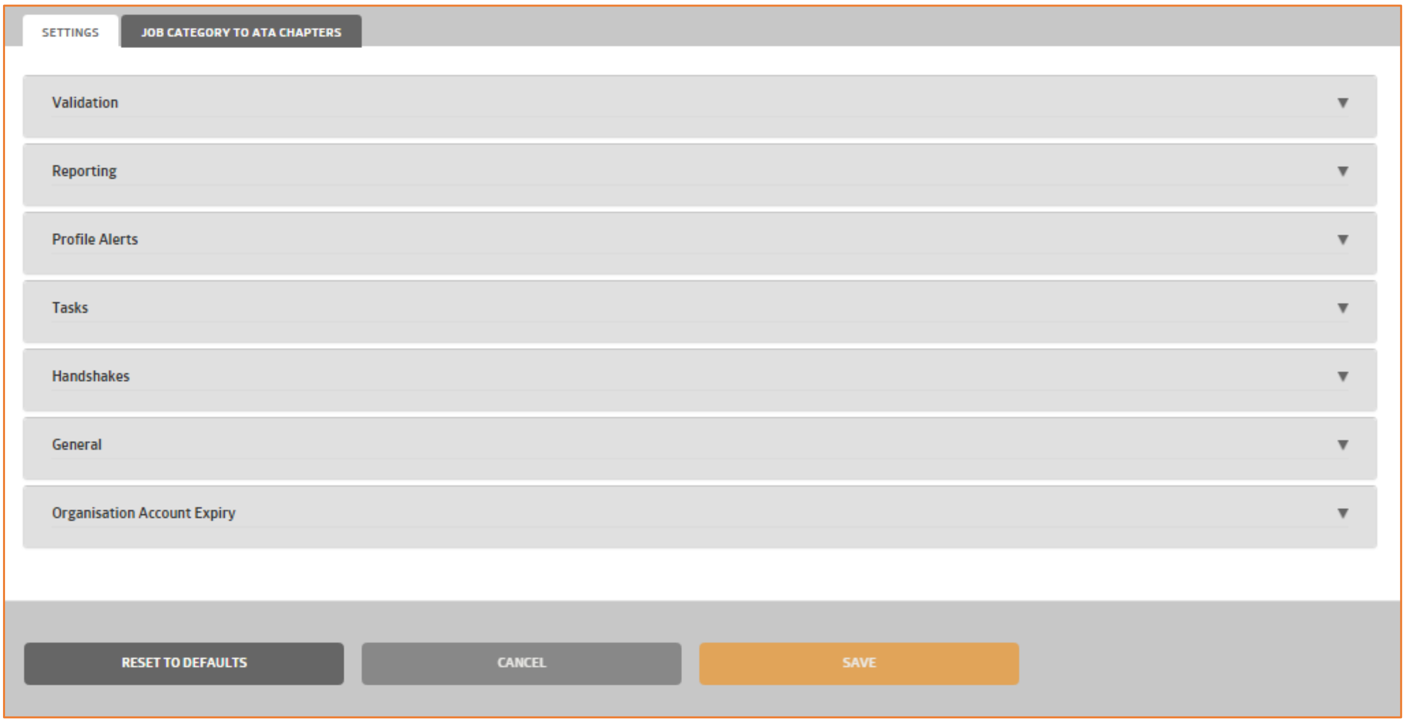


Figure 8: CA Settings screen

### ‘Job Category to ATA Chapters’
When you select this tab, it gives you the option to adjust the settings for the assigned ATA Chapters for each Category and Job Role/Method. The application has default chapters in place but this can be customised for your Company by adding or removing ATA Chapters as required.

Select ‘**Save’** at the bottom of the screen to apply the changes.

## Chapter 4: Handshakes and High-5′s

### Handshake Connections
This is an indefinite connection between your Organisation and another ELMS user. The connection can be requested by either party but cannot be actioned unless both parties consent. The Handshake allows an Organisation to access to competence related data and allows the ELMS user’s records to contribute to the organisation’s competence and compliance data. For more information, please see our infographic on *‘Profile & Connections’*

### Creating a Handshake Connection
Go to the left-hand menu **‘Manage Organisation’, ‘Create Handshake’** to produce the screen as shown in *Figure 9* below.

Select ‘**Organisation’** and **’ Location’** using the drop down menus.
Enter the employee’s ‘**Start Date’** at that location.
Enter the employees **‘Email Address’**.

Note: Please ensure the employee’s email address is valid and frequently used as this is where ELMS will send the notification and Subscription Key if applicable

Select the ‘**Roles**’ to assign the user using the tick boxes. More than one can be ticked if applicable.
Select the ‘**Contract Type’** using the tick boxes.
Tick ‘**Assign Licence’**, select either ‘**Full**’ (allows the user to create their own Handshake(s) and High-5’s with other users) or ‘**Restricted**’ (disables the ability to create connections) click ‘**Create Handshake’**.

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

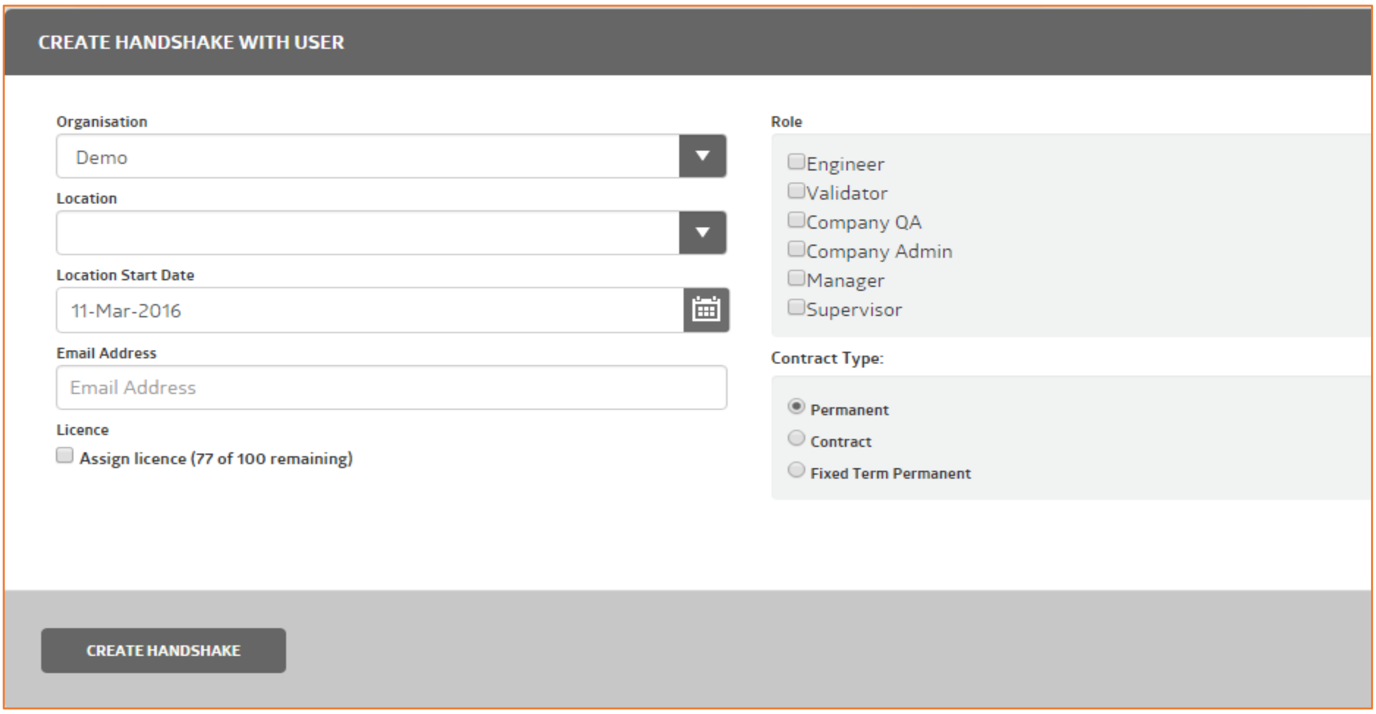



Figure 9: Creating a Handshake



PREVENTING TOMORROW’S RISKS

## Accepting a Handshake

If a user requests a Handshake with your Orgaisation you will receive a email and the notification will also appear under the **'Pending Handshakes'**, list under '**Organisation Handshakes'** as per above. There will be two options available, '**Accept**' or '**Decline**'.

You have to accept the Handshake for the user to become affiliated with your Organisation and start contributing to your competency profile. If you are not sure who the user is, view the user's profile to assess their details before actioning.

## Breaking a Handshake

Go to the left-hand menu and select 'Manage Organisation', 'Organisation Handshakes'. Under 'Current Handshakes', next to the user you wish to break the Handshake with click 'Break'. See *Figure 10* below.

The user will receive a notification via email as well as having their key (if assigned) removed.

ORGANISATION HANDSHAKES

CURRENT HANDSHAKES

| User Name | User | Valid From | |
|---|---|---|---|
| engineer1@elms.com | Engineer 1 | 01-Sep-2013 | BREAK |
| engineer2@elms.com | Engineer 2 | 01-Aug-2013 | BREAK |
| engineer3@elms.com | Engineer 3 | 01-Feb-2014 | BREAK |
| engineer4@elms.com | Engineer 4 | 01-May-2014 | BREAK |
| engineer5@elms.com | Engineer 5 | 01-Jun-2014 | BREAK |
| engineer6@elms.com | Engineer 6 | 01-Jun-2014 | BREAK |

Figure 10: Removing a Hanshake connection.

To withdraw a Pending Handshake navigate to the '**Organisation Handshakes'** page, as per above, scroll down the '**Pending Handshakes**', select the user you wish to withdraw the Handshake from and click the '**Withdraw**' button . See *Figure 11*.

PENDING HANDSHAKES

| User | Initiated Date | Initiated By | Initiated By User | |
|---|---|---|---|---|
| engineer1@elms.com | 02-Jul-2015 | User | Engineer 1 | ACCEPT DECLINE |
| engineer2@elms.com | 18-Jun-2015 | Company | Engineer 2 | WITHDRAW |
| engineer3@elms.com | 18-Jun-2015 | Company | Engineer 3 | WITHDRAW |
| engineer4@elms.com | 18-Jun-2015 | Company | Engineer 4 | WITHDRAW |
| engineer5@elms.com | 18-Jun-2015 | Company | Engineer 5 | WITHDRAW |
| engineer6@elms.com | 21-Jan-2016 | Company | Engineer 6 | WITHDRAW |

Figure 11: Pending Handshake screen.

### High-5 Connections

High-5 connections are a short-term connection 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 profile and competence related data, plus the ability to include them in certain management reports, for a set period of time controlled by the individual being assessed. For more information, please see our infographic on *'Profile & Connections'*

### Creating a High-5 Connection

Go to '**Manage Organisation', 'Organisation High-5's'** and click '**Create High-5 Request**'.

The '**Organisation**' box will be pre-populated.
Enter the '**Email Address'** of the ELMS user you wish to connect with then select **'Submit'.**

A pop up box confirms the visibility request has been sent to the email address entered.
The user will receive a notification of the High-5 request which they can accept or decline.

If they accept they also have the further options of setting the High-5 '**Duration'** and **'Visibility Level'**.

When a user grants an Organisation access to their profile via a High-5, they can choose whether to give Limited or Full visibility.

- FULL ACCESS – Means the organisation has the ability to view the entire users profile, including personal details, attachments and medical history. They also have the ability to run core competency reports in order to assess the users' experience records.
- LIMITED ACCESS – Means the organisation cannot view any attachments, personal details, profile image, or the medical history of the user. The organisation however can still run reports to assess the experience records of the user granting visibility.

Once they accept you will receive notification of this including what duration and visibility level they have set.

Note: Both parties must consent to the connection in order for the High-5 to be formed.

### Managing High-5 Connections

Under '**Manage Organisation**', **'Organisation High-5's'** you can view all the users you have visibility over.

- '**Valid From'** and '**Valid to'** dates of the connection
- '**Profile Visibility'** This lists the users who have granted you visibility over their profiles and gives an option to '**View Profile**'.

# Chapter 5: Subscription Keys

Subscription Keys can be assigned to employees within the Organisation using the Handshake function. This allows assigned users to be able to bypass the payment section of the application and automatically creates a Handshake with your Organisation.

### Assigning a Subscription Key

A Subscription Key is assigned to a user using a Handshake connection. (See *Chapter 4: Handshakes & High-5s*)

### Managing Subscription Keys

To see how many Subscription Keys your Organiation has **'Available', 'Redeemed'** and **'Pending'** go to the left-hand menu and click **'Manage Organisation'**, **'View Organisation'** then select the tab **'Licence Keys'.**

- **'Licence Entitlement'**: Shows the total number of Subscription Keys available to your Organisation.
- **'Redeemed Keys'**: Shows the number of Subscription Keys activated by your Organisations users.
- **'Pending Keys'**: Shows the number of Subscription Keys awaiting activitation.

- **‘Available Keys’**: Is the remianing number of Subscription Keys still avilable to Organisation.

Below these figures is a list of all the Organisation’s users who have redeemed their keys.

If you need additional Subscription Keys, please speak to a member of the ELMS support team.

### Removing a Subscription Key

To remove a Subscription Key, locate the **‘Licence Keys’** tab within the **‘View Organisation’** page. Locate the user you wish to remove the key from and click on the **‘WITHDRAW KEY’** button. This will remove the user’s key but the Handshake will remain in place.

## Chapter 6: Part M / Maintenance Support - Task Titles & Task Details

The application has commonly used **Task Titles** for Part M and Maintenance Support preloaded. However, to enable your staff to drill down into more detail when adding their experience records, the CA has the functionality to create Task Details.

Under **‘Manage Organisation’, ‘View Organisation’** click the tab ‘**Task Title**’. This displays a list of the pre-loaded task titles under the tab ‘**Part M’** and ‘**Maintenance Support’**.

### Part M

1. Select the ‘**Part M**’ tab.
2. Click ‘**Add’** to add a new task title.
3. Click ‘**Save’** at the bottom of the screen to save your changes.

### Maintenance Support

By selecting this tab you will be able to add/view Maintenance Support Task Details. To do this;

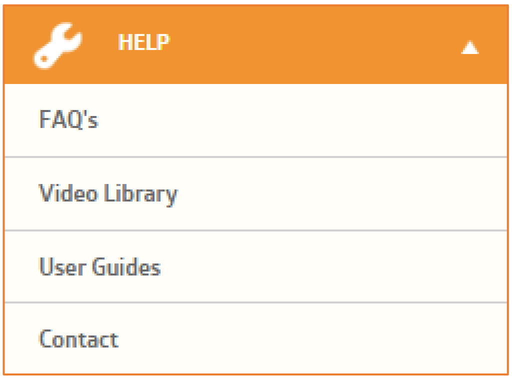
1. Click ‘**Add’** to add a new task title.
2. Click **‘Save’** at the bottom of the screen to save your changes.

Once these are saved, users can select them when attempting to build their experience records.

These Task Details will not be able to be selected by other Organisations. Only those who have a current Handshake with your Organisation can select these within their experience records.

# Chapter 7: 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).