User Guide:
Manager

PREVENTING
TOMORROW'S
RISKS

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Introduction

The purpose of this document is to provide support and assistance for Manager users when using the ELMS application.

Manager Role

The role of Manager is assigned to you by your Organisation's Company Administrator (CA) user. As a Manager, you can run the same reports as an Engineer; in addition, you can run reports against any individual user or group of users using the suite of Management Reports, enabling you to utilise your work force more effectively and efficiently in addition to continually assess competency.
The red box in *Figure 1* highlights the permission that you have been granted.

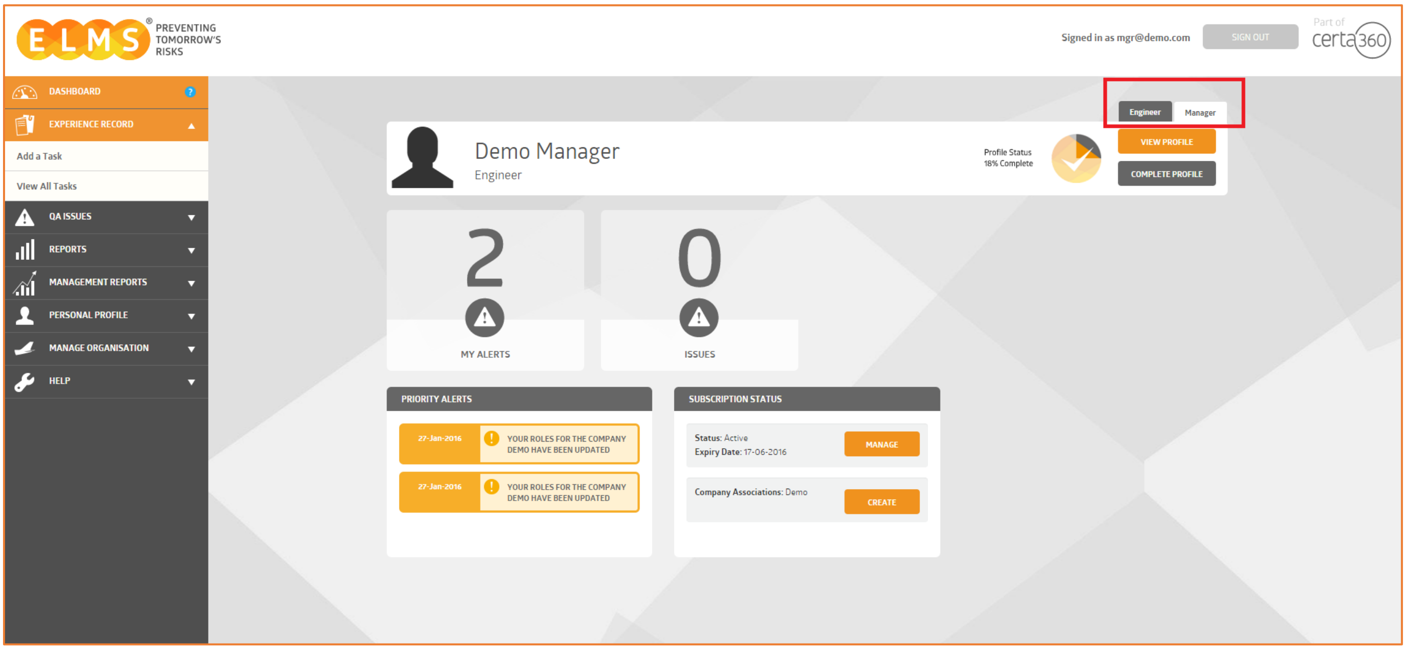

Figure 1. Manager dashboard layout

Chapter 1: QA Issues

From the menu on the left-hand side of the dashboard screen select '**QA Issues'** and '**My QA Issues'**. This is where any Issues raised for QA will be shown.

My QA Issues

This lists all the experience records that you personally have had referred to other QA permission holders to action. When using this function, the page will run with a default filters. This means the page will only look at experience records that are in a state of 'Active' and 'Under Investigation'. To add to these filters, simple choose the 'ADD FILTER' button or to remove, simply choose the grey 'X' button.

Chapter 2: Manage Organisation

Select 'MANAGE ORGANISATION' in the left-hand menu. In this section, we have:

1. View Organisation
2. View Users
3. Procedural Alerts

View Organisation

Choosing the 'View Organisation' section of the application, you will gain access to unique Organisational information and the following tabs will be available;

- Basic Details
- Contacts
- Company Type & Approval Numbers
- Approval Details
- Locations

As a Manager permission holder, you will not be able to edit this information, only a CA user can this content.

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, 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.

An individual user's entry on the list details their Profile Image, Email, Name and Company Permissions that have been assigned. There are also three options at the right of their entry *VIEW PROFILE [Inline & Dialog]* and *MANAGE USER.*

- ***VIEW PROFILE***: This allows you to see all of that user's profile details
    - ***Inline* –** The users profile will appear within the app
    - ***Dialog* –** The users profile will appear in a new pop-out window.

- ***MANAGE USER***: there are two tabs.
    - ASSIGNED COMPETENCIES. Select the ADD button to assign any Company created Competency to that individual. These will not be able to be assigned to the user if that individual does not have the correct competencies in their profile. The assessment will show where they have passed and failed.

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- COMPETENCY ASSESSMENTS. As a manager, you are able to Assign and Assess Company Competence Assessments that have been created by the Company Administrators, by selecting the ADD button.

NOTE: Company created Competency Assessments are created by the CA user, see *CA User Guide / Chapter 7: Company Competency Definitions*

Procedural Alerts

Under this section, you can view any Procedural Notifications, who they were sent to and who has responded. Only those users who created the Procedural Alert can remove them from the archive. Once they have been removed, they cannot be.

Chapter 3: Reporting

As a Manager permission holder, you have the functionality to run the application's twelve reports, against any user that your Organisations holds a Handshake or High-5 with.

These include the four core competency reports:

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

For more information about how these reports work and their use, please see the separate user guide *'The Four Core Competency Reports'.*

And the eight management reports:

- Validation Summary
- Experience Record Report
- Competence Assessment Search
- Competence Assessment Report
- Staff Summary
- Profile & Training Search
- Gap Analysis Report
- Resource & Competency Report

For more information about how these reports work and their use, please see the separate user guide *'The Eight Management Reports'*

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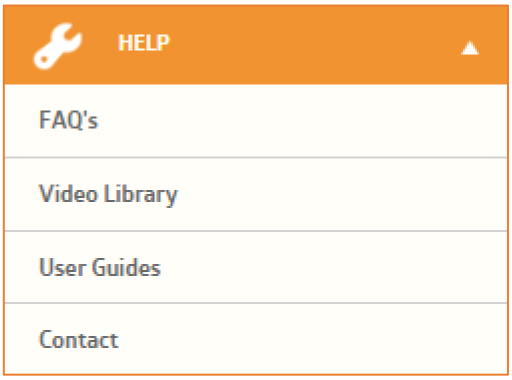
Chapter 4: Help

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).