

# User Guide: The Four Core Competency Reports



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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 reporting functionality.

## Competence Reports

Four pre-programmed Competence Reports are available under the **'Report'** heading on the left-hand side menu:

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

These reports provide a means to easily evaluate associated engineer's competence, ensuring tasks are allocated to the most suitable individuals and the appropriate level of supervision is set.

# Chapter 1: General Competency Report

The general competency report can be used by individuals to assess their own, or others competency score. Engineer permission holders can only run the report against themselves, however those assigned with Supervisor, Manager and QA permissions, can assess the entire workforce, helping aid to aid planning and resource management.

**Example:** By running the assessment against a specific aircraft type and ATA chapters, against a specific set of users could help determine which users to assign to a certain are of work.

Figure 1 shows an example of the report criteria screen.

Figure 1: General Competence Report criteria selection screen.

The **criteria** fields for the report are as follows:

- **Organisation:** This field will either be pre-populated otherwise select one from the drop-down list.
- **Location:** Select a location from the drop-down list or leave as default 'All Locations'.
- **Maintenance Type:** Select 'Base', 'Line', 'Workshop', 'Part M' or 'Maintenance Support' from the drop-down list.
- **Aircraft Type:** Start typing the aircraft type then select using the pre-programmed drop down list.

## 'Users'

Using the tick boxes select one of the following:

- **All Engineers:** Runs the report on all the Organisations associated engineers
- **Single Engineer:** Runs the report against one selected individual. Select using drop down list.
- **Engineer Sets:** Runs the report against a set of Engineers. Select from any pre-saved sets or create a new one.

See separate user guide for guidance on 'Creating, editing or deleting sets'.

## 'ATA Chapter/Chapter Sets/Job Category/Roles'

Select one of the following using the radio buttons:

**Note:** Choosing a selection from this section is mandatory to be able to run the report.

- **ATA Chapter:** Type in the specific ATA Chapter to run the report against.
- **Chapter Sets:** Select from any pre-saved sets or create a new one. See 'Creating, editing and deleting sets' above.
- **Job Category/Role:** Click in the box to select from the pre-populated drop down list.

## ‘Primary Activity Types’

This section contains a series of tick boxes; select one or more from the options shown or tick ‘Select All’.

Above this section you can select ‘Require any of the activity types’, which requires the report to consider any of the ‘Activity Types’ you have selected. This is the default setting.

By changing the selection to ‘Require all of the activity types’ requires the report to only consider tasks containing all the ‘Activity Types’ you have selected.

- **Report Date:** Today’s date is the default or select from the calendar box. It can be before but not later than today’s date.
- **No. of months:** The report runs against a ELMS default of 60 months, but this can be adjusted as required.
- **No. of tasks:** This determines how many matching tasks are required to obtain a 100% score within the report.
- **Reset Criteria:** Resets the report criteria to the default parameters.
- **Run Report:** Produces a report based on the criteria set. *Figure 2* below shows an example of a run report.

Choosing a ‘ATA Chapter/Chapter Sets/Job Category/Roles’ is mandatory to run the report.

### Example:

If ‘All Engineers’ and a single ‘ATA Chapter’ are selected in the criteria the report will show the associated engineers with a percentage mark for that ATA number in a bar against their name.

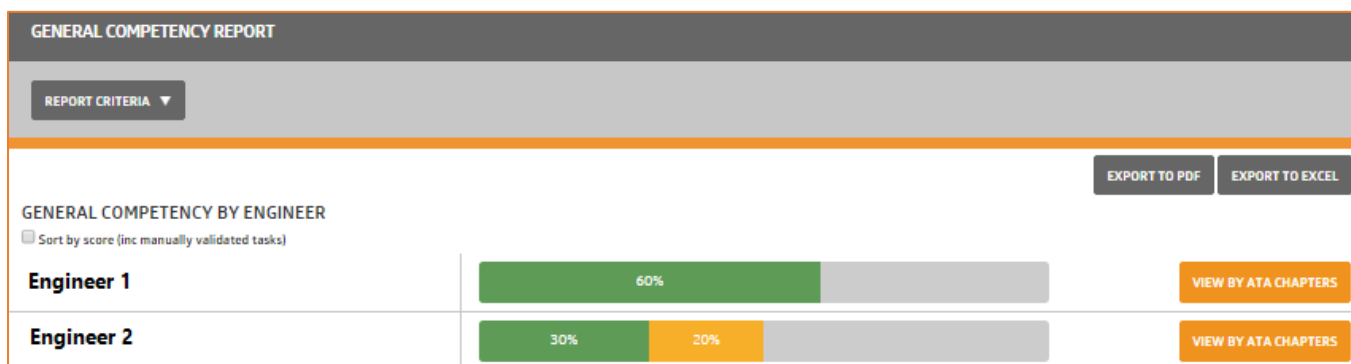


Figure 2: Example of run General Competency Report

The **green** bar represents Validated tasks whilst the **amber** represents Manually Validated tasks. *For more information regarding Manual Validation, please see our Engineer user guide.*

- **Report Criteria:** Opens the original report criteria so you can make amendments and re-run the report.

When running the report against two or more users, the report will automatically arrange the engineers in validated score order, without considering the manually validated tasks. Clicking the “**Sort by score (including manually validated task)**” tick box, will arrange the users in order of their total score inclusive of any manually validated scores.

Example: Engineer 2 shown in *Figure 2*, would have a total score of 50%.

- **View by ATA chapter:** This shows the competency score by ATA chapter screen as shown in *Figure 3*

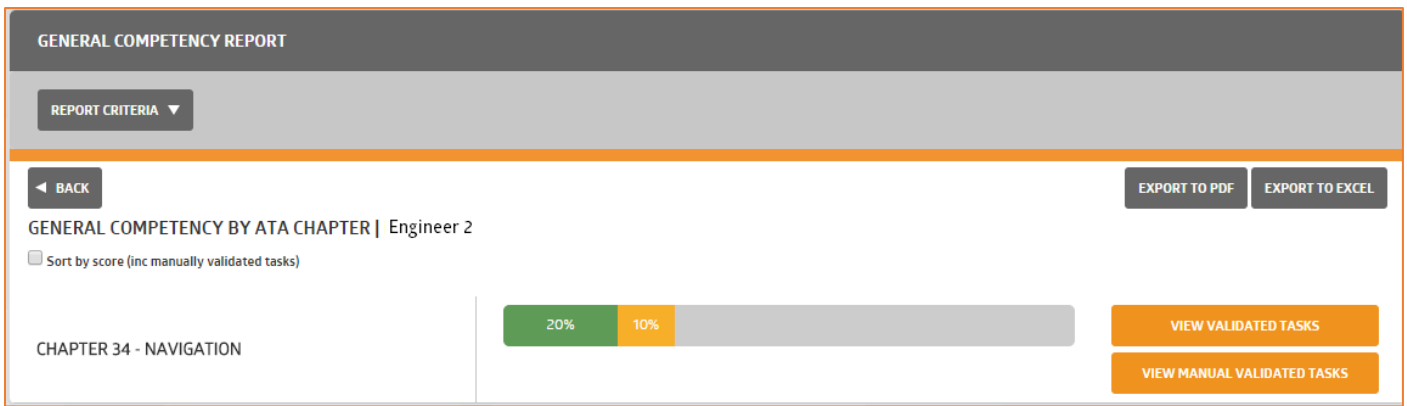


Figure 3: General Competency Report by ATA chapter.

You can then drill down further into the report by clicking ‘**View Validated Task**’ or ‘**View Manual Validated Tasks**’. This will open a screen that includes all the tasks that contribute towards the engineers score.

‘**Back**’: Takes you back to the original competency by engineer report screen.

‘**Export to PDF**’ and ‘**Export to Excel**’: Allows you to export the report so you can print or save it as a PDF or Excel spreadsheet. See ‘*Exporting Documents*’ below for information on how to do this.

## Exporting Documents

### Exporting to PDF

Where you have the option to click ‘**Export to PDF**’ a pop up screen will appear with tick box options for paper orientation and a drop-down box for selecting paper size. Once selected, click ‘**Generate Report**’ - this creates a screen like *Figure 4*.

- **Download:** Enables you to save the report to your machine or device.
- **Cancel:** closes the PDF preview screen and returns to the application.

### Exporting to Excel

Where you have the option to click ‘**Export to Excel**’ you are able to bring the document into a spreadsheet format with normal Excel options.

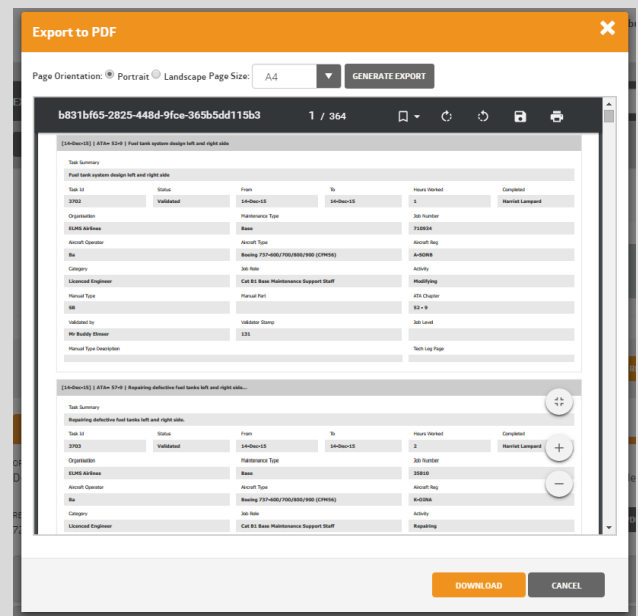


Figure 4 – Generating a PDF

## Chapter 2: Competency by Task Report

This report can be used to identify the manpower best suited for a specific task on an aircraft, based on the users' validated experience. Whilst the **'General Competency Report'** can potentially select the "team", this report could assist in selecting which task(s) to allocate to specific members of that team.

**Note:** As an Engineer permission holder, you can only run this report against yourself. However, as a Supervisor, Manager or QA permission holder, you can run this report against your entire workforce.

The screenshot shows the 'COMPETENCY BY TASK REPORT' criteria screen. It features a 'REPORT CRITERIA' header with a dropdown arrow. Below this, there are several input fields and options: 'Organisation' (set to 'Demo'), 'Location' (set to '-- All Locations --'), 'Maintenance Type' (empty), and 'Aircraft Type' (empty). There are radio buttons for 'All Engineers' (selected), 'Single Engineer', and 'Engineer Set'. To the right, there are three text input fields for 'ATA Chapter', 'Sub Chapter', and 'Subject'. Below these is a section for 'Require any of the activity type(s) selected below.' with a dropdown arrow and a list of checkboxes: 'Select All', 'Changing component', 'Operational and functional testing', 'Servicing', 'Inspection', 'Releasing aircraft to service', 'Supervising these Maintenance Activities', 'Modifying', 'Repairing', and 'Troubleshooting'. At the bottom, there are fields for 'Report Date' (12-Apr-2017), 'No of months' (24), and 'Manual Type' (-- N/A --). Two buttons are at the bottom right: 'RUN REPORT' (orange) and 'RESET CRITERIA' (grey).

Figure 5: Competency by Task Report criteria screen

The criteria fields for the report are as follows:

- **'Organisation'**: This field will either be pre-populated otherwise select one from the drop down list.
- **'Location'**: Select a location from the drop down list or leave as default **'All Locations'**.
- **'Maintenance Type'**: Select **'Base'**, **'Line'**, **'Workshop'**, **'Part M'** or **'Maintenance Support'** from the drop down list.
- **'Aircraft Type'**: Start typing the aircraft type then select using the pre-programmed drop down list.

### 'Users'

Using the tick boxes select one of the following:

- **All Engineers**: Runs the report on all the Organisations associated engineers
- **Single Engineer**: Runs the report against one selected individual. Select using drop down list.
- **Engineer Sets**: Runs the report against a set of Engineers. Select from any pre-saved sets or create a new one.

See separate user guide for guidance on 'Creating, editing or deleting sets'.

- Enter the **'ATA Chapter, Sub Chapter and Subject.'**

### 'Primary Activity Types'

This section contains a series of tick boxes; select one or more from the options shown or tick **'Select All'**.

Above this section you can select 'Require any of the activity types', which requires the report to consider any of the 'Activity Types' you have selected. This is the default setting.

By changing the selection to 'Require all of the activity types' requires the report to only consider tasks containing all the 'Activity Types' you have selected.

- **Report Date:** Today's date is the default or select from the calendar box. It can be before but not later than today's date.
- **No. of months:** The report runs against a default of 24 months, but this can be adjusted as required.
- **Manual Type:** Select from the drop-down list.
- **Reset Criteria:** Clears any content you have entered in the report criteria to start again.
- **Run Report:** This report displays a list of the selected engineers with a percentage bar showing their Competency by the Task as shown in *Figure 6*.

**Note:** Maintenance Type, Aircraft Type, Activity Type, ATA Chapter, Sub Chapter & Subject are all mandatory to run the report successfully.

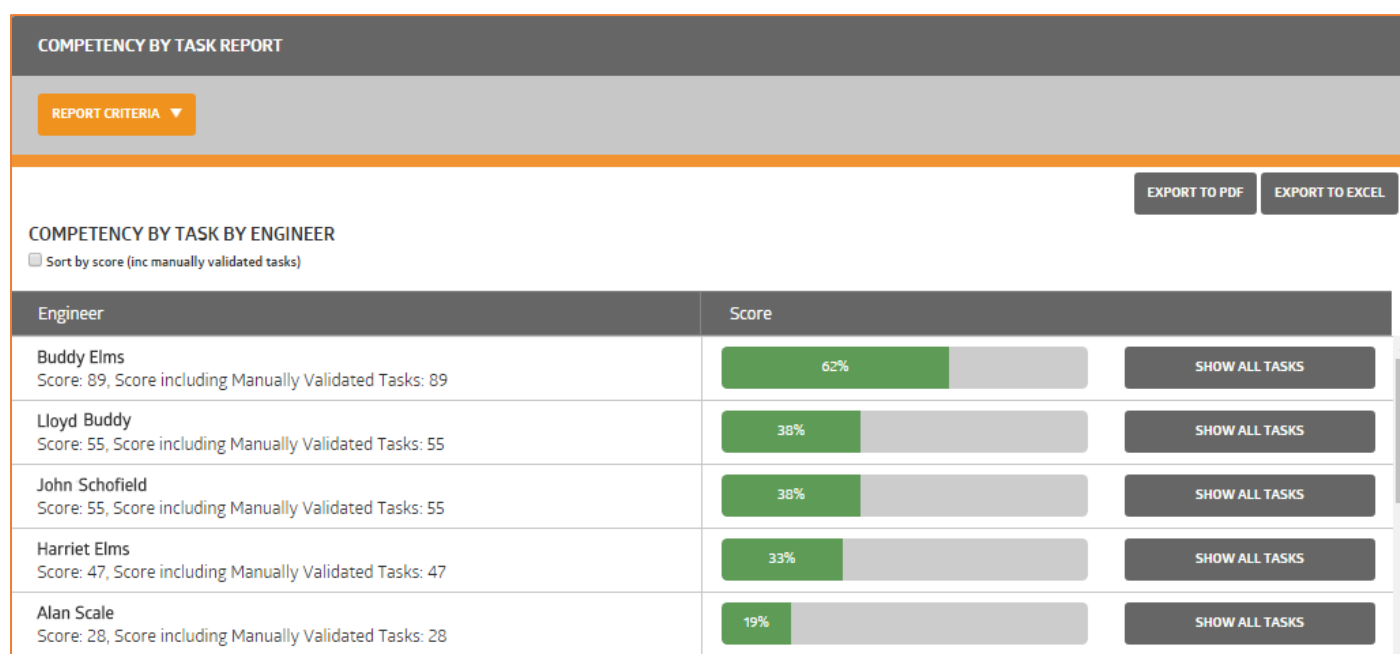


Figure 6: Competency by Task report example

The **green** bar represents Validated tasks whilst any **amber** bar represents Manually Validated tasks. *For more information regarding Manual Validation, please see our Engineer user guide.*

When running the report against two or more users, the report will automatically arrange the engineers in validated score order, without considering the manually validated tasks. Clicking the **“Sort by score (including manually validated task)”** tick box, will arrange the users in order of their total score inclusive of any manually validated scores.

- **Show All Tasks:** Displays the top five matching Validated tasks along with the top five matching Manually Validate. Clicking on a task opens the task details.
- **Back:** Takes you back to the original competency report by engineer, report screen.
- **Export to PDF and Export to Excel:** Allows you to export the report so you can print or save it as a PDF or Excel spreadsheet. See [‘Exporting Documents’](#) in Chapter 1 for information on how to do this.



## Chapter 3: Recency Report

The Recency Report can be used by Engineers, Supervisors, Managers and Quality Assurance (QA) users to assess recency.

**Note:** As an Engineer permission holder, you can only run this report against yourself. However, as a Supervisor, Manager or QA permission holder, you can run this report against your entire workforce.

Selecting this report will produce the report criteria screen shown in *Figure 7*.

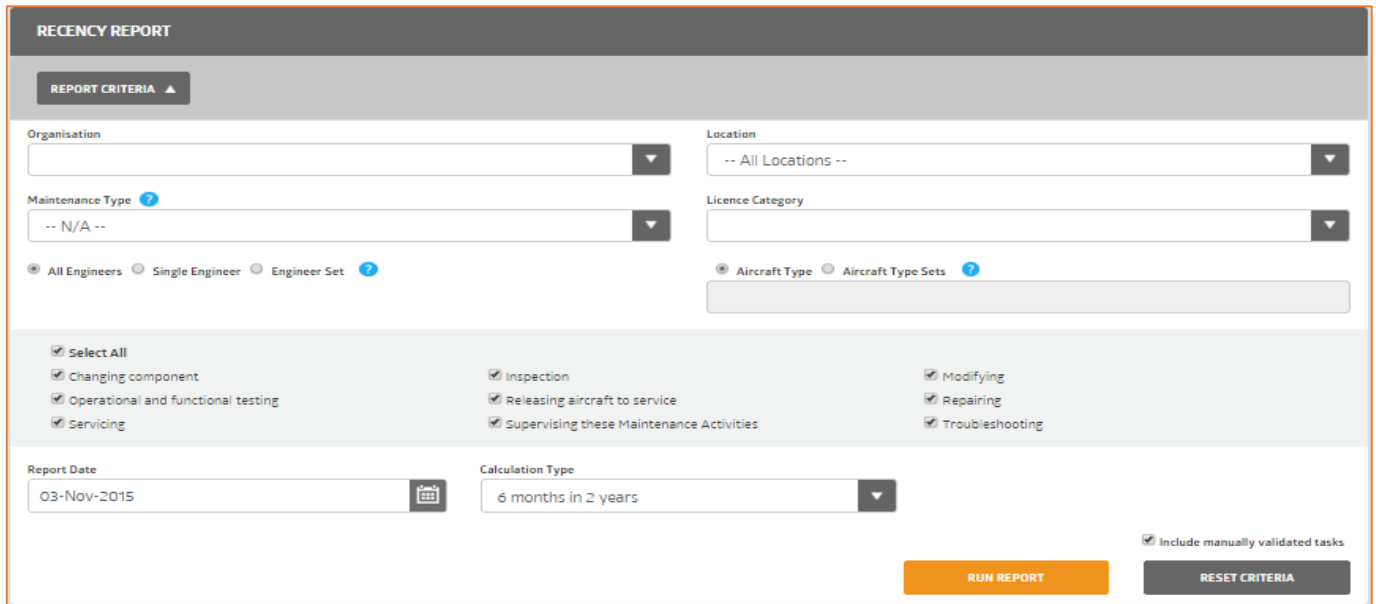


Figure 7: Recency Report criteria screen

The criteria fields for the report are as follows:

- **Organisation:** This field will either be pre-populated otherwise select one from the drop-down.
- **Location:** Select a location from the drop-down or leave as default 'All Locations'.
- **Maintenance Type:** Select 'Base', 'Line', 'Workshop', 'Part M', 'Maintenance Support' or 'Base & Line' from the drop-down.
- **Licence Category:** Select using the drop-down box once you have selected the 'Maintenance Type'.

### 'Users'

Using the tick boxes select one of the following:

- **All Engineers:** Runs the report on all the Organisations associated engineers
- **Single Engineer:** Runs the report against one selected individual. Select using the drop down list.
- **Engineer Sets:** Runs the report against a set of Engineers. Select from any pre-saved sets or create a new one.

### 'Aircraft Type or Aircraft Type Sets'

Using the tick boxes select one of the following:

- **Aircraft Type:** Runs the report against a specific aircraft type. Start typing into the box and then choose from the pre-populated drop down list.
- **Aircraft Type Sets:** To run the report against a set of aircraft types. Select from any pre-saved sets or create a new set.

### 'Primary Activity Types'

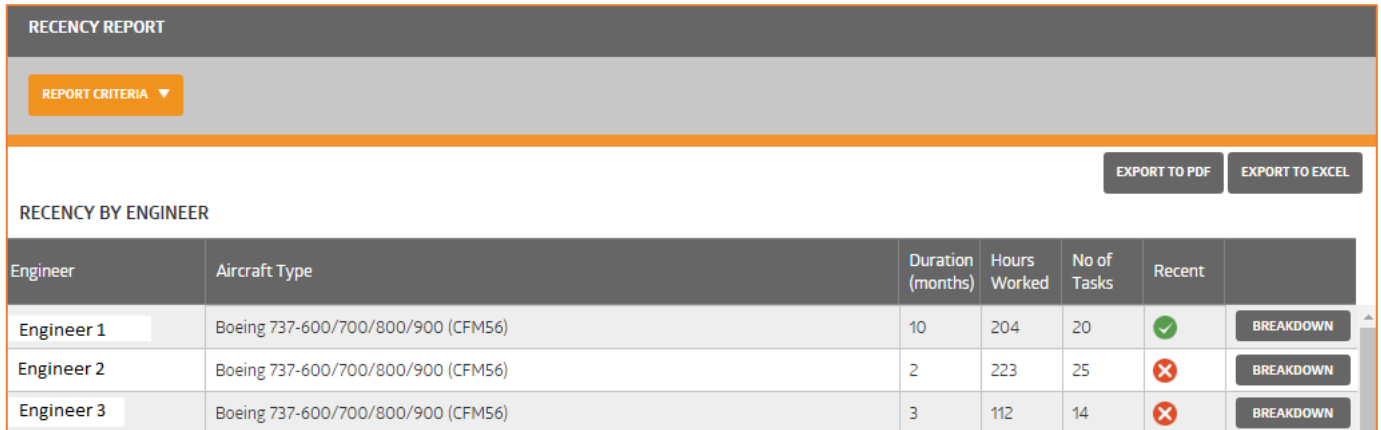
This section contains a series of tick boxes; select one or more from the options shown or tick 'Select All'.

- **Report Date:** Today's date is the default or select from the calendar box. It can be before but not later than today's date.



- **Calculation Type:** Select from drop down box. The system defaults to '6 months in two years' but this can be altered by an Organisation'
- **Reset Criteria:** Clears any content you have entered in the report criteria to start again.
- **Run Report:** Select to show a report listing the engineers name(s) in a chart as shown in *Figure 8*.

**Note:** Completing 'Aircraft Type or Aircraft Type Sets' is mandatory to be able to run the report successfully.



Engineer	Aircraft Type	Duration (months)	Hours Worked	No of Tasks	Recent	
Engineer 1	Boeing 737-600/700/800/900 (CFM56)	10	204	20	✓	BREAKDOWN
Engineer 2	Boeing 737-600/700/800/900 (CFM56)	2	223	25	✗	BREAKDOWN
Engineer 3	Boeing 737-600/700/800/900 (CFM56)	3	112	14	✗	BREAKDOWN

Figure 8: Recency Report example

The report shows a breakdown of the Engineers and their 'Duration (months)', 'Hours Worked' and 'Number of Tasks' completed against the aircraft type(s) selected.

The 'Recent' box will display either a green tick or a red cross to indicate if the Engineer is deemed recent on the selected aircraft type(s).

At the right-hand side of each individual engineer's report is an option 'Breakdown'. Clicking this displays a screen similar to the one in *Figure 9* overleaf, listing the tasks completed in each period along with the 'Hours Worked'.

You can drill down further by clicking 'Show Tasks', where tasks have been carried out, so you can see clearly the details of each task carried out.

REGENCY REPORT			
REPORT CRITERIA ▾			
<a href="#">← BACK</a>		<a href="#">EXPORT TO PDF</a>	
<b>REGENCY BY ENGINEER BY AIRCRAFT TYPE</b>		<b>Engineer: Engineer 1</b>	
Aircraft Type: Boeing 737-600/700/800/900 (CFM56)		<b>Key</b>	
No of Tasks: 20		Period considered for Recency	
Duration: 10 month(s)			
Hours Worked: 204			
Recency Status: <span style="color: green;">✔</span>			
Period	Tasks	Hours Worked	View Tasks
DEC 16	1	1	<a href="#">SHOW TASKS</a>
NOV 16	2	4	<a href="#">SHOW TASKS</a>
OCT 16	2	53	<a href="#">SHOW TASKS</a>
SEP 16	3	10	<a href="#">SHOW TASKS</a>
AUG 16	0	0	
JUL 16	3	7	<a href="#">SHOW TASKS</a>
JUN 16	3	36	<a href="#">SHOW TASKS</a>
MAY 16	1	21	<a href="#">SHOW TASKS</a>
APR 16	1	32	<a href="#">SHOW TASKS</a>
MAR 16	0	0	
FEB 16	0	0	
JAN 16	0	0	

Figure 9: Recency Report, showing 24 month breakdown

**‘Back’:** Takes you back to the original competency by engineer report screen.

**‘Export to PDF’ and ‘Export to Excel’:** Allows you to export the report so you can print or save it as a PDF or Excel spreadsheet. See [‘Exporting Documents’](#) in Chapter 1 for information on how to do this

## Chapter 4: Competence Training

This report is can be used to assess a users' individual competencies within their profile. This assessment can be against the ELMS default Job Role settings or the Organisations own specific settings.

Running the assessment against Job Roles or Company Competencies gives a **pass** or **fail** mark to show whether that user has met the criteria of the assessment.

**Note:** As an Engineer permission holder, you can only run this report against yourself. However, as a Supervisor, Manager or QA permission holder, you can run this report against your entire workforce.

The screenshot shows the 'COMPETENCE TRAINING AND QUALIFICATION ASSESSMENT' report criteria screen. It features a 'REPORT CRITERIA' button at the top left. The form includes several sections: 'Organisation' with a dropdown menu showing 'Demo'; 'Location' with a dropdown menu showing '-- All Locations --'; 'Competency By' with radio buttons for 'Job Role' (selected) and 'Company Competency'; 'Aircraft Type' with a text input field; 'Category' with a dropdown menu; 'Job Role / Method' with a dropdown menu and a help icon; and 'Competency Criteria' with radio buttons for 'Organisation Criteria' (selected) and 'Default System Criteria'. At the bottom right, there are two buttons: 'RUN REPORT' and 'RESET CRITERIA'.

Figure 10: Competence Training and Qualification Assessment report criteria screen.

The criteria fields for the report are as follows:

- **Organisation:** This field will either be pre-populated otherwise select one from the drop-down list.
- **Location:** Select a location from the drop-down list or leave as default '**All Locations**'.
- **Aircraft Type:** Start typing the aircraft type then select using the pre-populated drop down list.

### 'Competency by'

Use the tick boxes to choose to either run the report against '**Job Role**' or '**Company Competency**'

### 'Job Role'

- **Category:** Use the drop-down menu to choose the job category.
- **Job Role/Method:** Use the drop-down menu to select the job role/method by which the job category was performed.

### 'Competency Criteria'

Using the tick boxes select one of the following:

- **Organisation Criteria:** This loads the competence criteria set by the Organisations CA for that job role
- **Default System Criteria:** Loads the competence criteria set by the ELMS application for that job role

**'Company Competency':** Select one of the company competencies from the drop-down menu.

### 'Users'

Using the tick boxes select one of the following:

- **All Engineers:** Runs the report on all the Organisations associated engineers
- **Single Engineer:** Runs the report against one selected individual. Select using the drop-down list.

- **Engineer Sets:** Runs the report against a set of Engineers. Select from any pre-saved sets or create a new set.
- **Reset Criteria:** Clears any content you have entered in the report criteria to start again.
- **Run Report:** Select to show a report listing the engineers name(s) in a chart as shown in *Figure 11*.

ENGINEER	RESULT	HISTORY
Alan Schofield	✓ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>
Barry Mason	✗ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>
Buddy Elms	✓ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>
David Marshall	✗ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>
Demo Manager	✗ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>
Harriet Elms	✓ <a href="#">VIEW ASSESSMENT</a>	<a href="#">VIEW HISTORY</a>

Figure 11: Assessment Report by Engineers screen

- **'View Assessment':** Shows all of the training and assessments for the particular Engineer each of which can be viewed. There are options to **'View Profile'**, **'Override'** and **'Add Comments'**. See the example in *Figure 12* on the next page.

You can also see a history of archived assessment results by using the **'View History'** button.

**'Back'** returns you to the **'Assessment Report by Engineers'** screen.

COMPETENCE TRAINING AND QUALIFICATION ASSESSMENT

REPORT CRITERIA ▾

← BACK

**ENGINEER ASSESSMENT REPORT**  
 Engineer: Engineer 1  
 Assessment Date: 10-Mar-2016  
 Assessed By: Demo Manager  
 Aircraft Type:  
 Competency: ✓

✓ Induction Training

Criteria Type: Induction Training    Is Aircraft Type Specific: No    Competency Date: 01-Feb-2016  
 Expiry Date:     VIEW PROFILE

ATTACHMENTS: management.png [🔍] [📄]

COMMENTS: ✓ [OVERRIDE] Add comments...

✓ Company Assessment  
 ✓ EWIS Training - Group 4  
 ✓ HF Training - Initial  
 ✓ HF Training - Refresher

Figure 12: View Assessment screen

'View History': Lists the Engineers Assessment History. Showing the 'Assessment Date', 'Assessed By', 'Original Result' and 'Result After Assessment' as shown in *Figure 13*.

COMPETENCE TRAINING AND QUALIFICATION ASSESSMENT

REPORT CRITERIA ▾

← BACK EXPORT TO PDF

**ENGINEER ASSESSMENT REPORT HISTORY**  
 Engineer: **Engineer 1**  
 Aircraft Type: Boeing 737-600/700/800/900 (CFM56)  
 Licence Category: B1-1 Aeroplanes Turbine

Assessment Date	Assessed By	Original Result	Result After Assessment	
15-Dec-2016	Demo Manager	✓	✓	VIEW ASSESSMENT
15-Dec-2016	Demo Manager	✓	✓	VIEW ASSESSMENT
15-Dec-2016	Demo Manager	✗	✗	VIEW ASSESSMENT

Figure 13: Engineer Assessment Report History.

By clicking 'View Assessment' this takes you to the 'View Assessment' screen in *Figure 13* above.

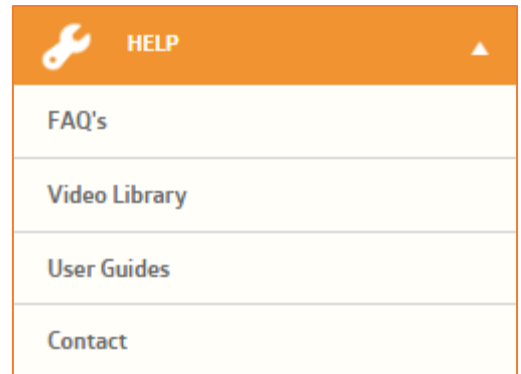
## Chapter 5: Help

### System Support

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

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).*