User Guide:
The Eight Management Reports

PREVENTING
TOMORROW'S
RISKS

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Introduction

Under Management Reports there are six reports available:

Validation Summary

This report is used to assess how well the validation process is working within your Organisation. Here you can view tasks, in any state, over any time scale. The report can also be run against sets of users or organisational validators. This enables management to assess the report to decide whether to revoke or assign additional validator permission holders when and if needed.

Experience Record Report

This report compiles a “task list” for the entire organisation which allows you, with the various filters, to assess, review and search for tasks. This will aid assigning your workforce to specific tasks they are competent in thereby best utilising staff.

Competence Assessment Search

This report compiles an “assessment list” for the entire organisation which allows you, with the various filters, to assess, review and search for company assessments in any state. This will aid searching for assessments with a particular score, status or subject. [Other filters available]

Competence Assessment Report

This report allows you to assess your entire workforce regarding how users have scored in their company assessments. Any active assessments can be searched for, including obtaining overall scores for the organisation, by location or by user.

Staff Summary Report

Staff Summary is used to see how many users of each permission level and job category there are across your Organisation. When viewing the report in table format you also can view the users task record details and profile information. You can also filter this report by location(s) to fully assess your workforce.

Profile & Training Search

This report checks any user(s) profile or training item to assess when they are due to expire. It will enable you to quickly assess who would benefit from further training courses and who your best qualified users are.

Gap Analysis Report

This report graphically displays where there are gaps in the profiles of the users within your Organisation. This can be used to assess any user, set of users or all users. By selecting the orange portion of the graph the system will show you the breakdown of each of the gaps and who has the missing mandatory profile information.

Resource & Competency Report

This report gives the organisation the ability to look at the ‘Competency Profile’ over a 12-month period in order to analyse trends. Furthermore, the ‘Resource Profile’ can be overlaid to aid resource planning and management.

Chapter 1: Management Reports

Validation Summary

This report is used to assess how well the validation process is working within your Organisation. Here you can view tasks, in any state, over any time scale. The report can also be run against sets of users or organisational validators. This enables management to assess the report to decide whether to revoke or assign additional validator permission holders when and if needed. *Figure 1* below shows the criteria selection screen for the report.

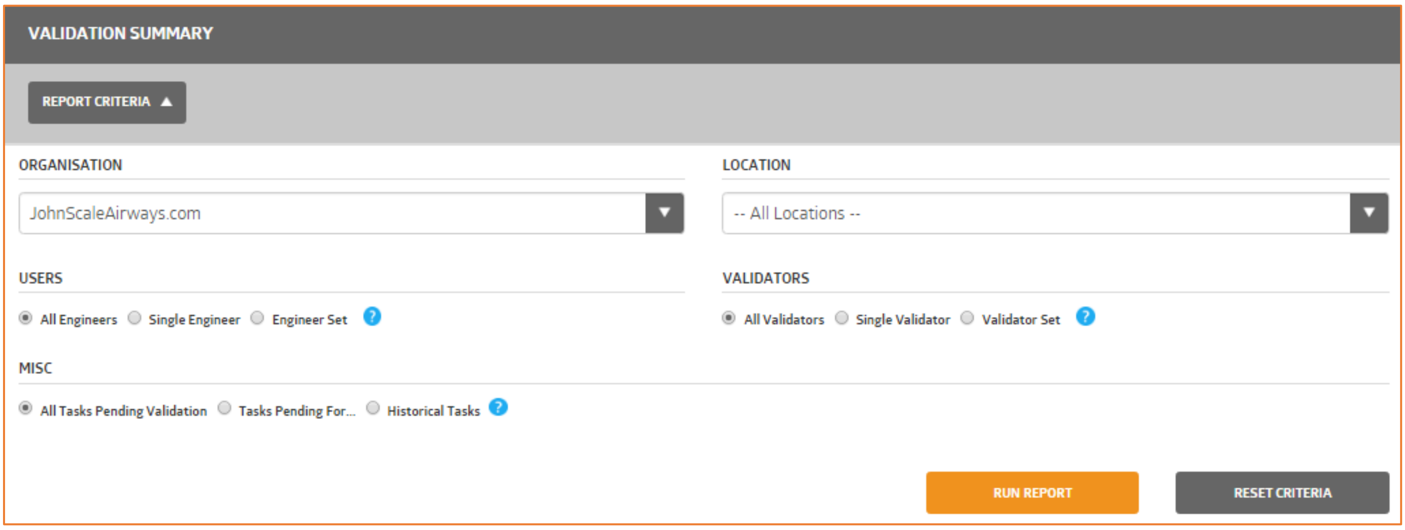


Figure 1: Validation Summary Report criteria selection

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Location**: Select a location from the drop-down list or leave as default: '**All Locations'**.

'Users'
Using the radio buttons, select one of the following:

- **All Engineers**: Runs the report on all the Organisation's associated engineers
- **Single Engineer**: Using this selection will open up two further drop downs
  - **Organisation Engineer**: Those users who have a current Handshake with your organisation.
  - **High-5 Engineers**: Those users who have a current High-5 with the Organisation, allowing you to assess these users before the decision to create a Handshake is made.
- **Engineer Sets**: Runs the report against a set of Engineers. Select from any pre-saved sets or create a new set.

For more information regarding Handshake/High-5 Connections and Sets, please see the relevant user guides.

'Validators'
Using the radio buttons, select one of the following:

- **All:** Select to run a report on <u>all</u> the Organisations Validators.
- **Single Validator:** Select an Organisations Validator using drop down list.
- **Validator Set:** Select from any pre-saved sets or create a new set.

'Miscellaneous'
Using the radio buttons, select one of the following:

- **All Tasks Pending Validation:** Select to run the report against all tasks that are currently in a state of 'Submitted' (awaiting to be actioned by a Validator)
- **Tasks Pending For**: Insert the number of days in the pop up box. The application will then search for tasks that have been in a state of '**Submitted'** for the specific amount of days that you enter.
- **Historical Tasks:** (Shown in *Figure. 2*) Enter the **'Submitted From'** and '**Submitted to'** dates for the period the report is required to cover.

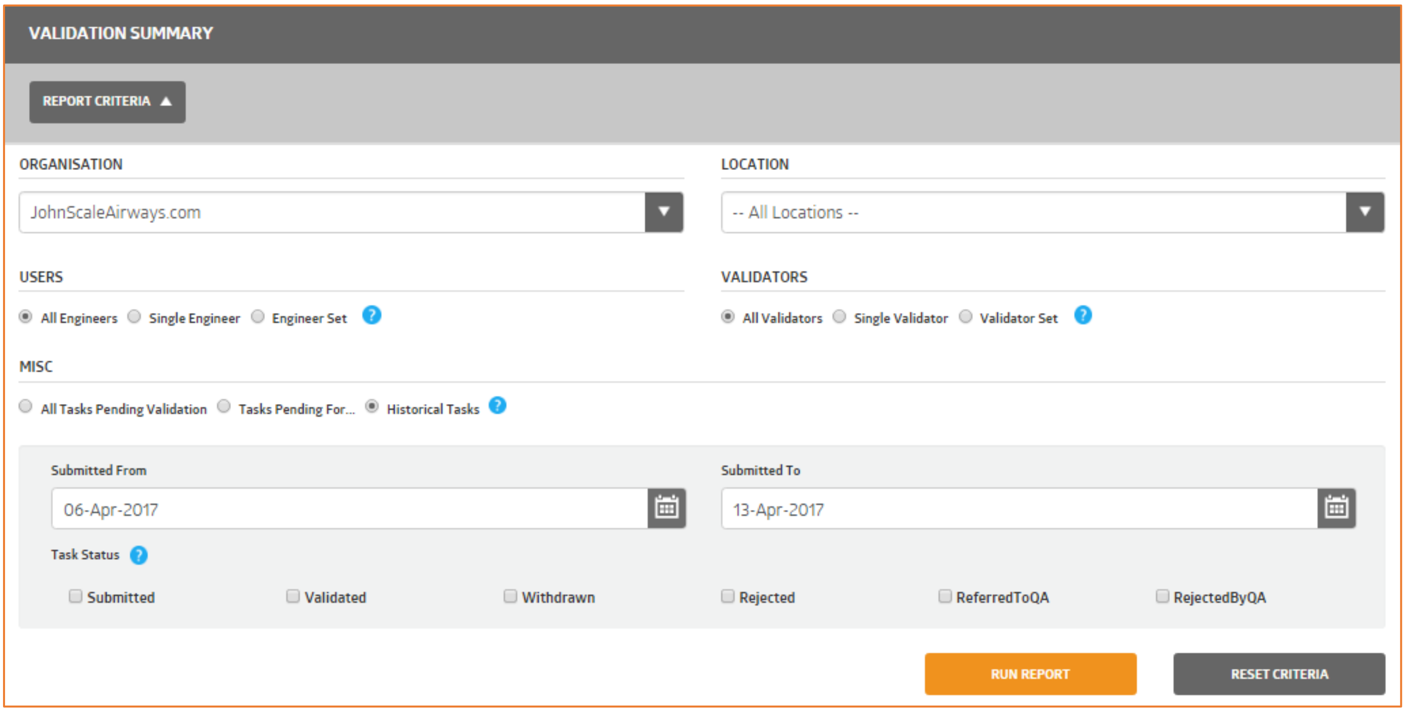


Figure 2: Using the 'Historical Tasks' radio button opens up additional report criteria

Select one or more from the task status tick boxes: **'Rejected', 'Submitted', 'Validated'** or **'Withdrawn'**.

- **Reset Criteria**: Resets the report criteria to the default parameters.
- **Run Report**: Produces a report based on the criteria. An example is shown in *Figure. 3*

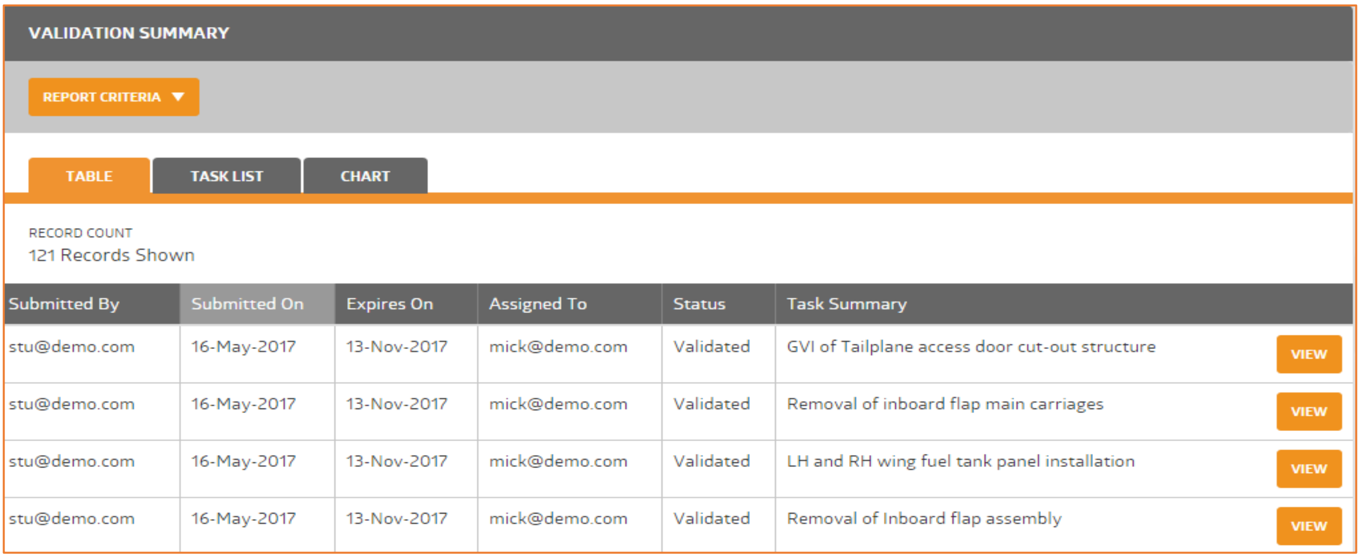


Figure 3: Validation Summary Report example.

The three tabs along the top display the results as a **Table, Task List** or **Chart** format.

Example:

Table: displays the records under the headings of **Submitted by**, **Submitted on**, **Expires on**, **Assigned to, Status** and **Task Summary**. Clicking any of these headings will sort the table according to the heading selected.
Clicking '**View**' displays the entire task record.

There is an option to view '**10, 25, 50 or 100'** task records at a time, on the bottom right of the screen.

Experience Record Report

This report displays a task list for the entire Organisation, allowing you to assess, review and search for specific tasks using a vast array of filters.

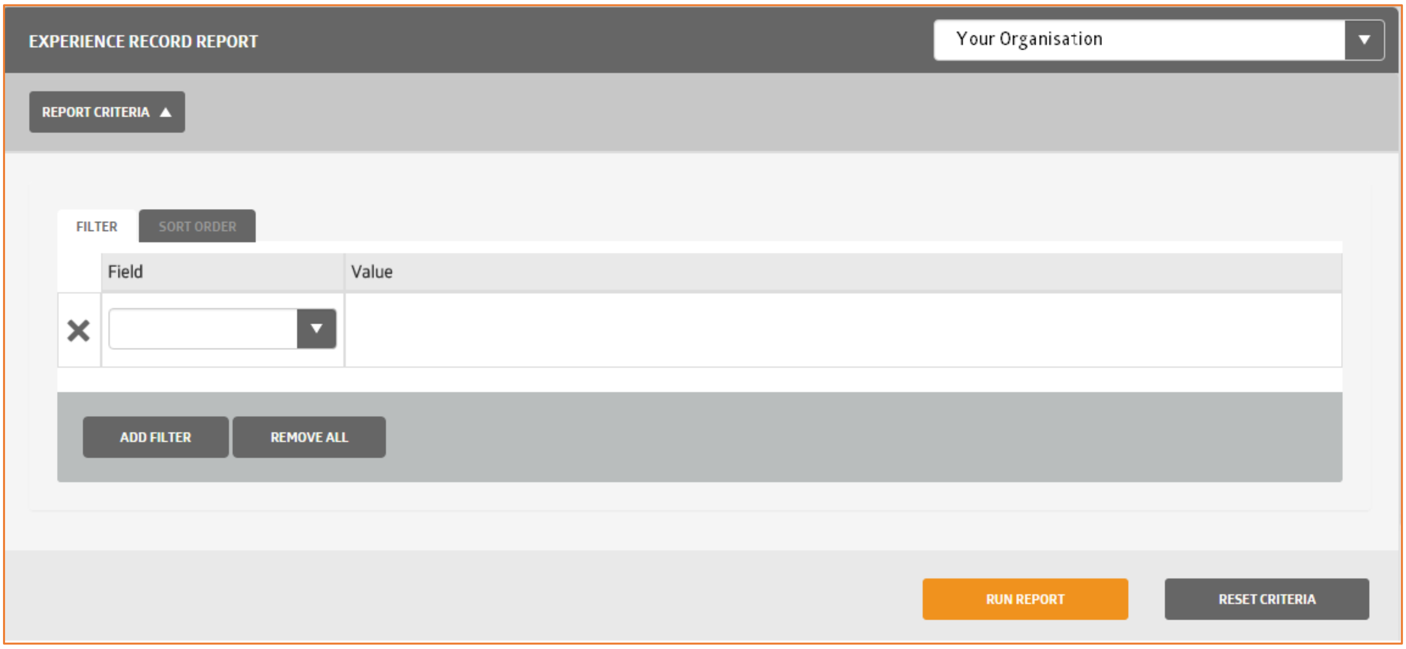


Figure 4: Management Reports, Experience Record Report criteria selection screen

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Filter**: Use the drop-down box to select a filter for the report.
- **Sort Order:** Allows you to arrange the order of tasks within the report.
- **Add Filter**: Adds a further filter to add additional criteria to your search.
- **Remove All**: Removes all the filters. To remove one filter select the cross symbol next to that filter.
- **Run Report**: Runs the report based on these filter options. Apply no filter for an entire list of tasks.
- **Reset Criteria**: Resets the report criteria to the default parameters.

The two tabs along the top display the results as either a '**List'** or **'Table'**. Toggle between the two for different views. An example of the report in a 'list' view is below in *Figure 5*.

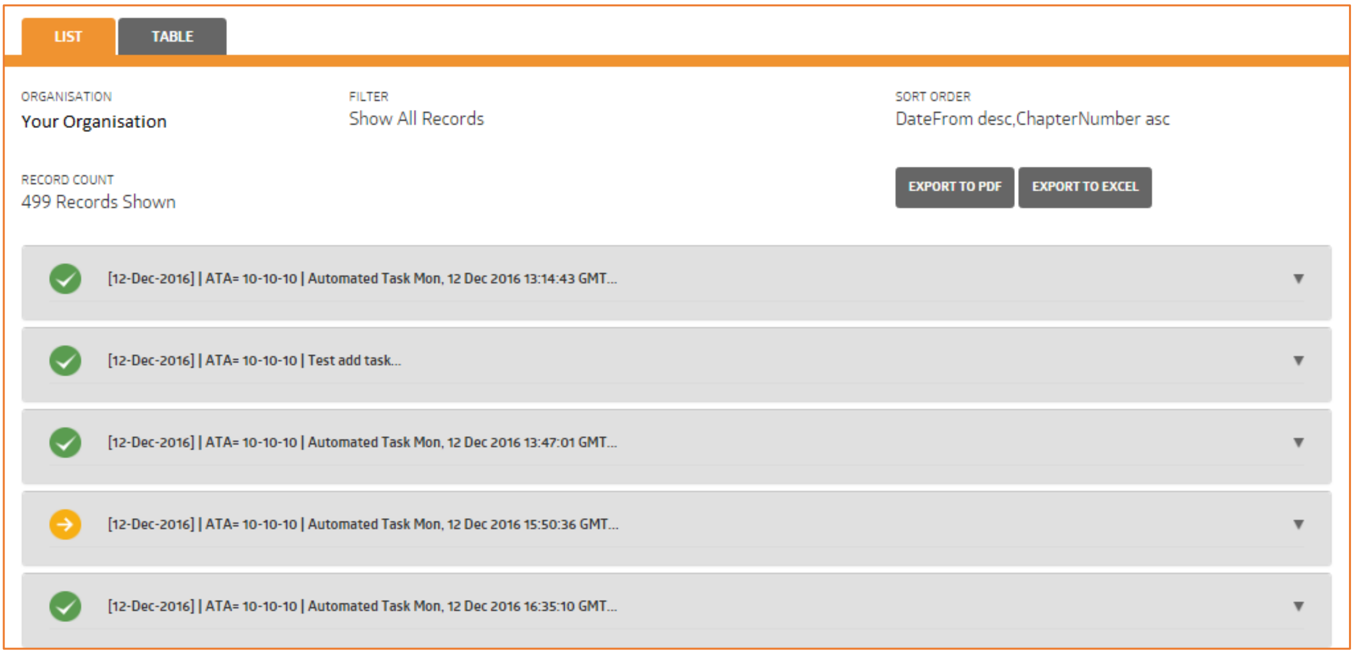


Figure 5: Experience Record Report in 'List' display.

Competence Assessment Search

This report compiles a “assessment list” for the entire organisation which allows you, with the various filters, to assess, review and search for company assessments in any state. This will aid searching for assessments with a particular score, status or subject. [Other filters available]

As a Manager or QA user from your dashboard;
→ Management Reports → Competence Assessment Search

A new report window will open. The report will function in a similar fashion to the Experience Record Report and the Validation Summary. The report will allow you to build up and style queries utilising filters that are specific to the Company Competency Assessment Records.

These filters include:

- Assessment
- Subject Criteria
- Assessed by
- User
- Date Assessed
- % score
- Renewal Date

Some of these are shown *below in Figure 6*

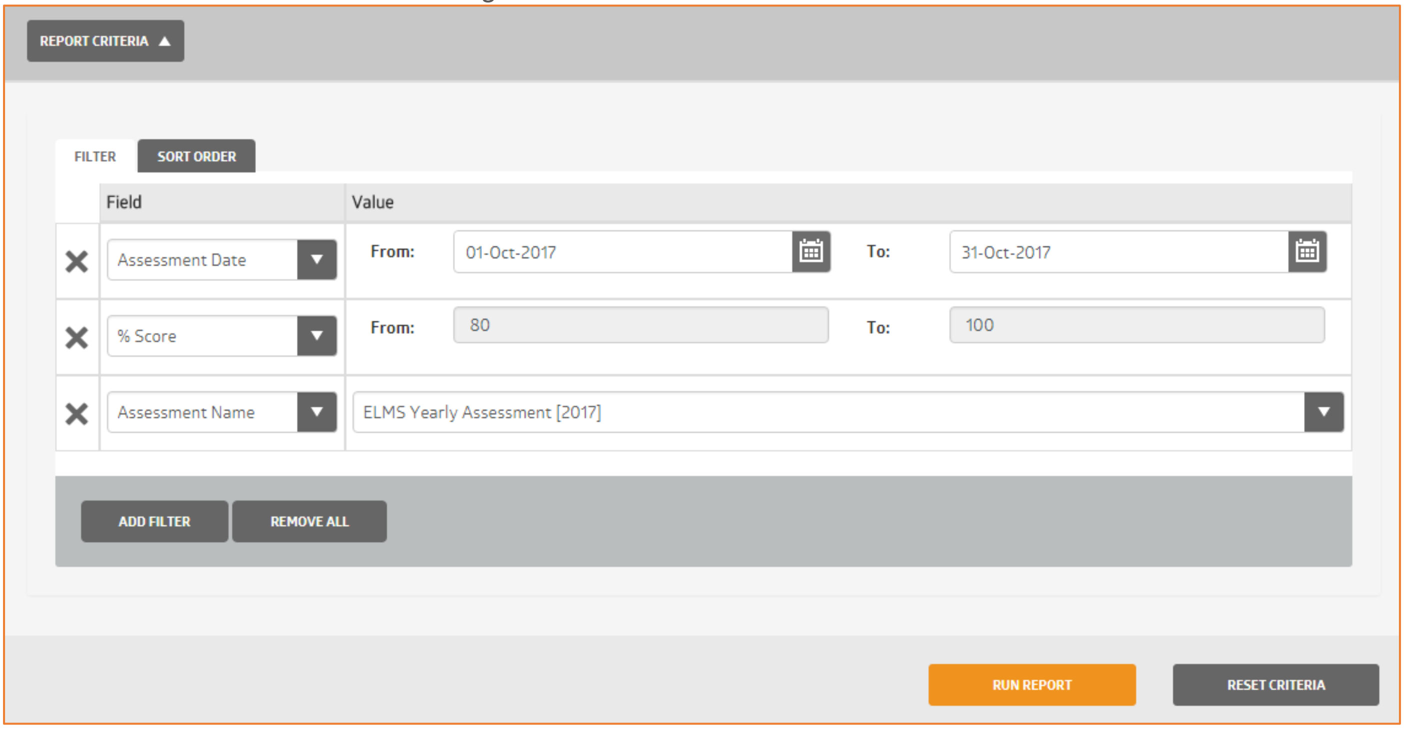


Figure 6 – Adding filters to the report

Run the report to extract any Company Assessments that meet your criteria. You can leave the report with no filters to retrieve a list of ALL Company Assessments.

These can be viewed in both a LIST and TABLE view, and both extracted to PDF and EXCEL.

Competence Assessment Report

This report allows you to assess your entire workforce in regard to how users have scored in their company assessments. Any active assessments can be searched for including obtaining overall scores for the organisation, by location or by user.

As a Manager or QA user from your dashboard;
→ Management Reports → Competence Assessment Report
-A new report window will open. The report criteria will allow you to select;

- Organisation
- Location
- Set of users / Individual Engineer
- Category
- Job Role
- Assessment or Subject Criteria
- Date of the report
  - Compare a specific date to another specific date
  - Compare a specific date to the same date in the previous year/s.

This is shown in *Figure 7 below*

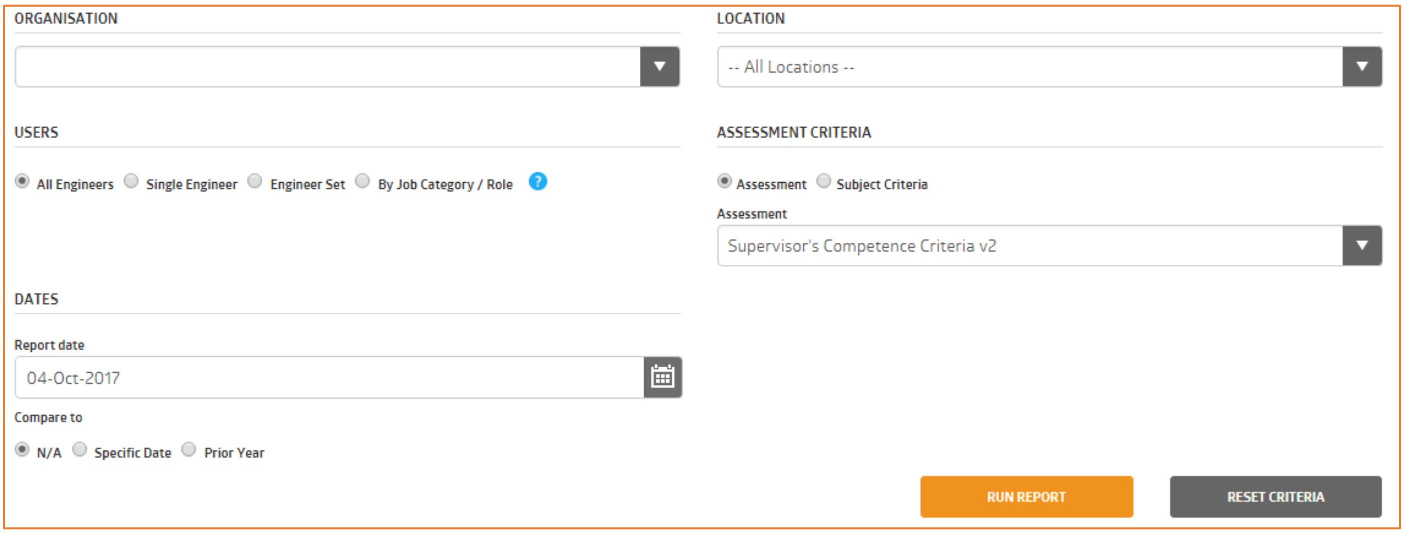


Figure 7 – An example of the report critera

The default view for a single date report will be the standard list with bar view, as utilised in the general competency and competency by task reports. Each organisation, location, individual, subject criteria (dependent on the state of the drill-down) will be presented by its own line with a colour coded bar, reflecting the score, and the associated percentage score.

Colour coded bars should reflect the following scoring gradients:

- **Red = <33%**
- **Amber = >33% & <66%**
- **Green = >66%**

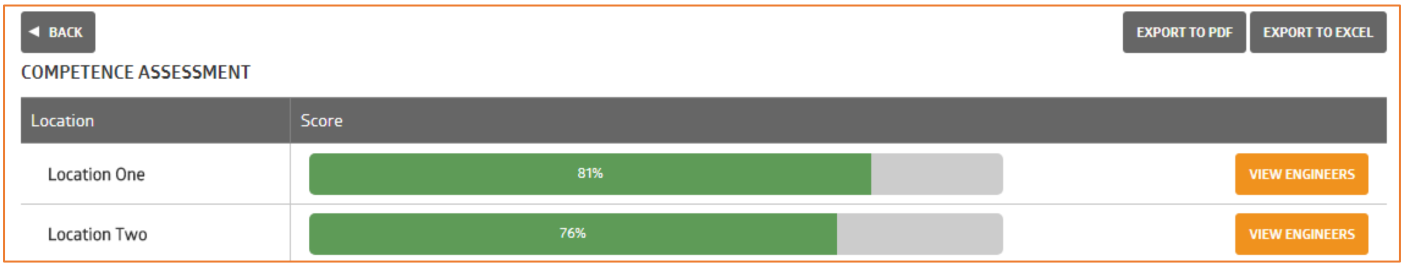


Figure 8 – Location View

PREVENTING TOMORROW'S RISKS

Additionally, each line will have a drill-down option. The drill-down hierarchy and appropriate stages are as follows

- Locations
- Engineers
- Subject Criteria

Before finally viewing the assessment.

You can also compare to a previous date, or by 1 or 2 years previous. Select the 'Compare By' option to do this.
Figure 9 below is an example of such comparative report.

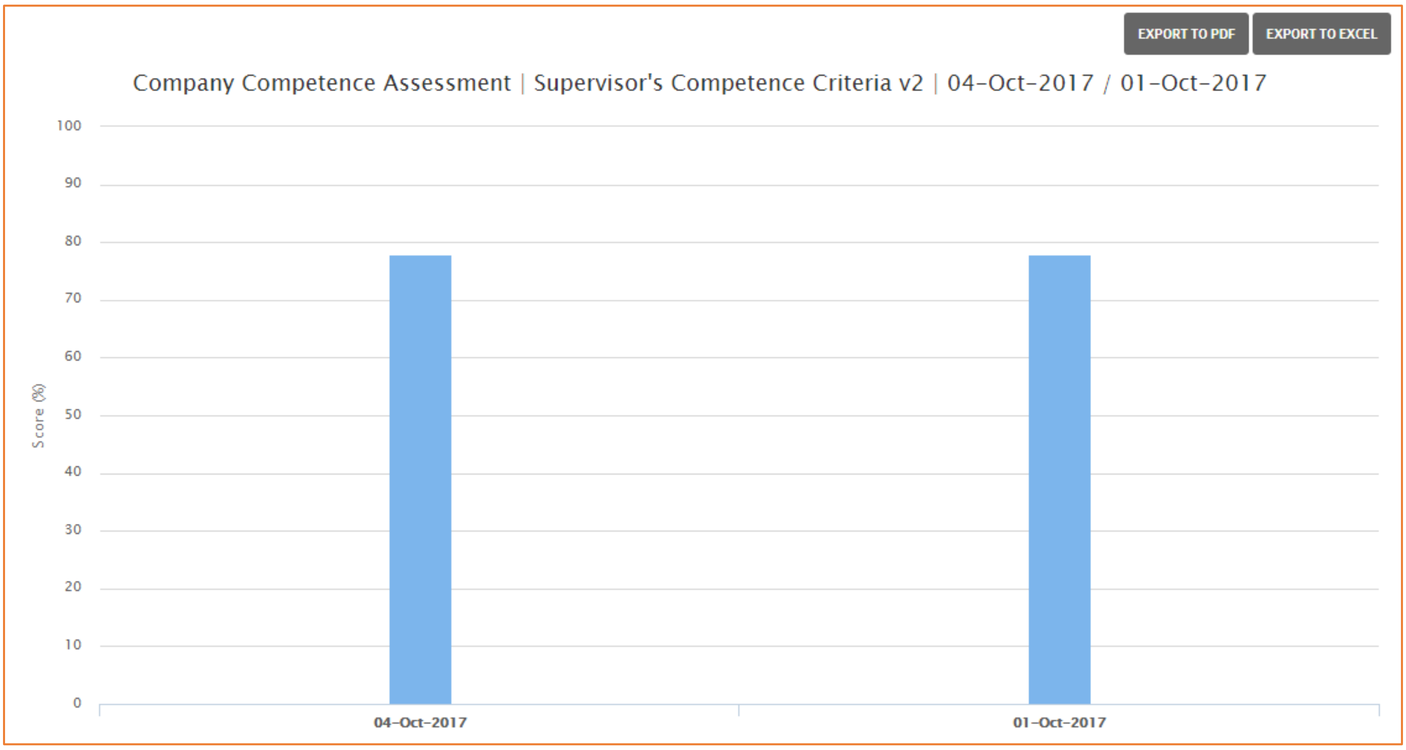


Figure 9 – Comparison Report

Staff Summary Report

The Staff Summary Report is used to see how many of each permission holder there are across your Organisation and by location if applicable. In the 'TABLE' view, you also can view the users task record details and profile information. *Figure 10 below* shows an example of the report criteria.

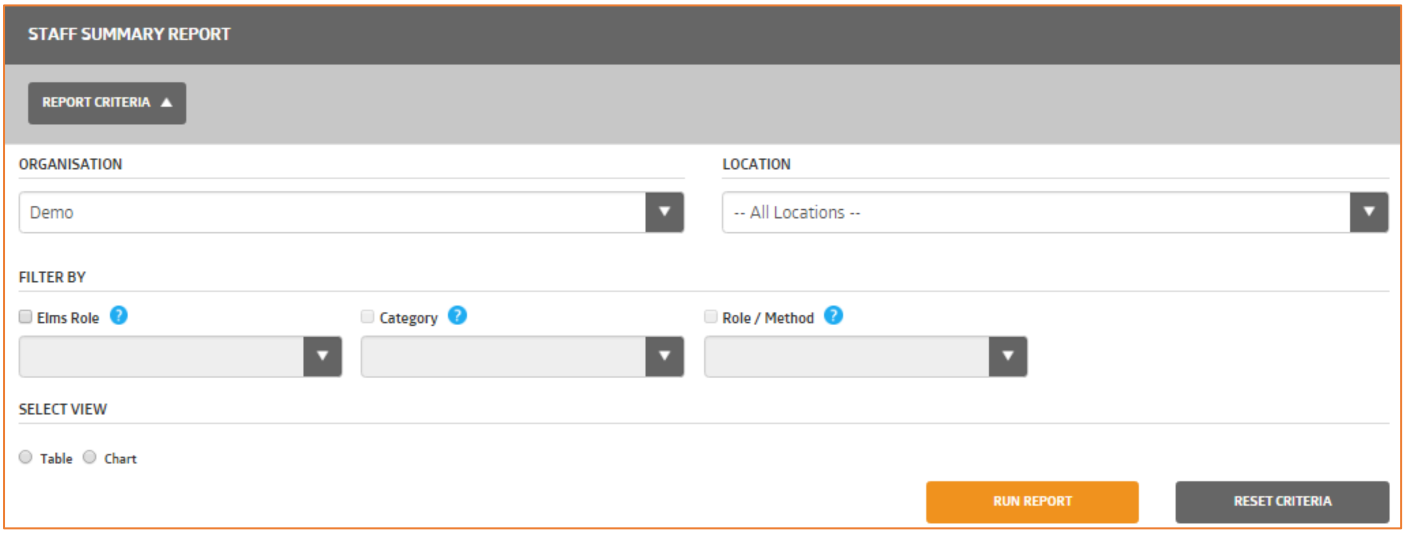


Figure 10: Staff Summary Report criteria selection screen

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Location**: Select a location from the drop-down list or leave as default '**All Locations**'.
- **Filter by:** Select '**ELMS Role'** and choose a role from the drop-down menu.

When '**Engineer'** is selected, there will be an option to add **'Category'** and '**Role/Method'** giving you the ability to drill down to users who have selected specific categories and roles within their personal profile.

'Select View'

Select from one of the radio buttons to produce the report in a **'Table'** format as shown in *Figure 11* or as a **'Chart'** as shown in *Figure 12*. Additionally, leave the '**Filter By**' option blank and use the '**Select View**' for an overall report of your organisation.

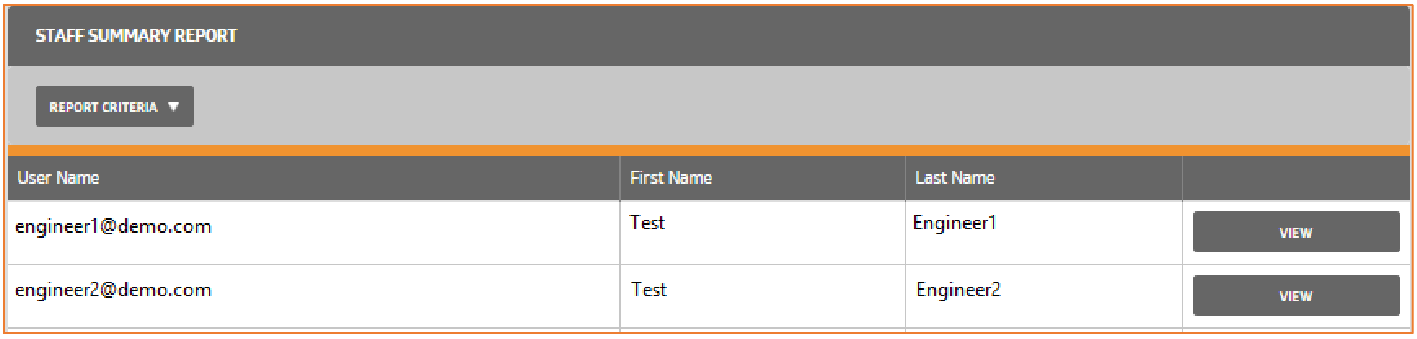


Figure 11: Staff Summary Report in table view

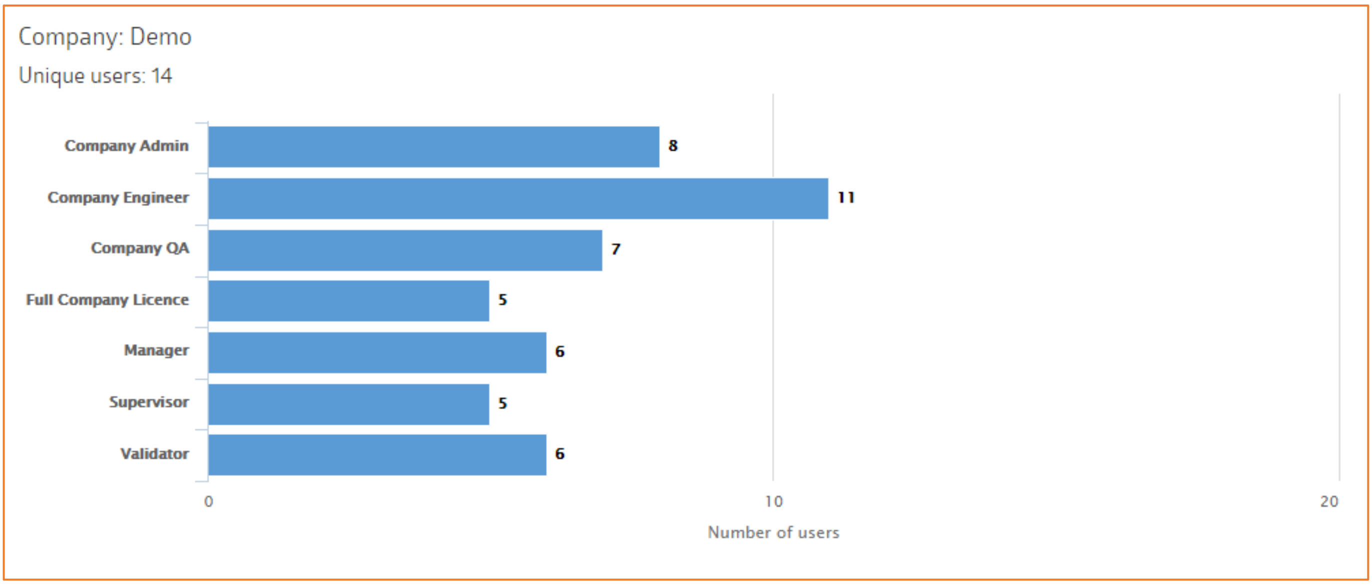


Figure 12: Staff Summary Report in chart view.

When **'Table'** view is selected, you have the option to '**View'** which opens the '**View User'** screen as shown in *Figure 13* below. This screen has two main tabs along top allowing you to view the users '**Profile'** or '**Tasks'**

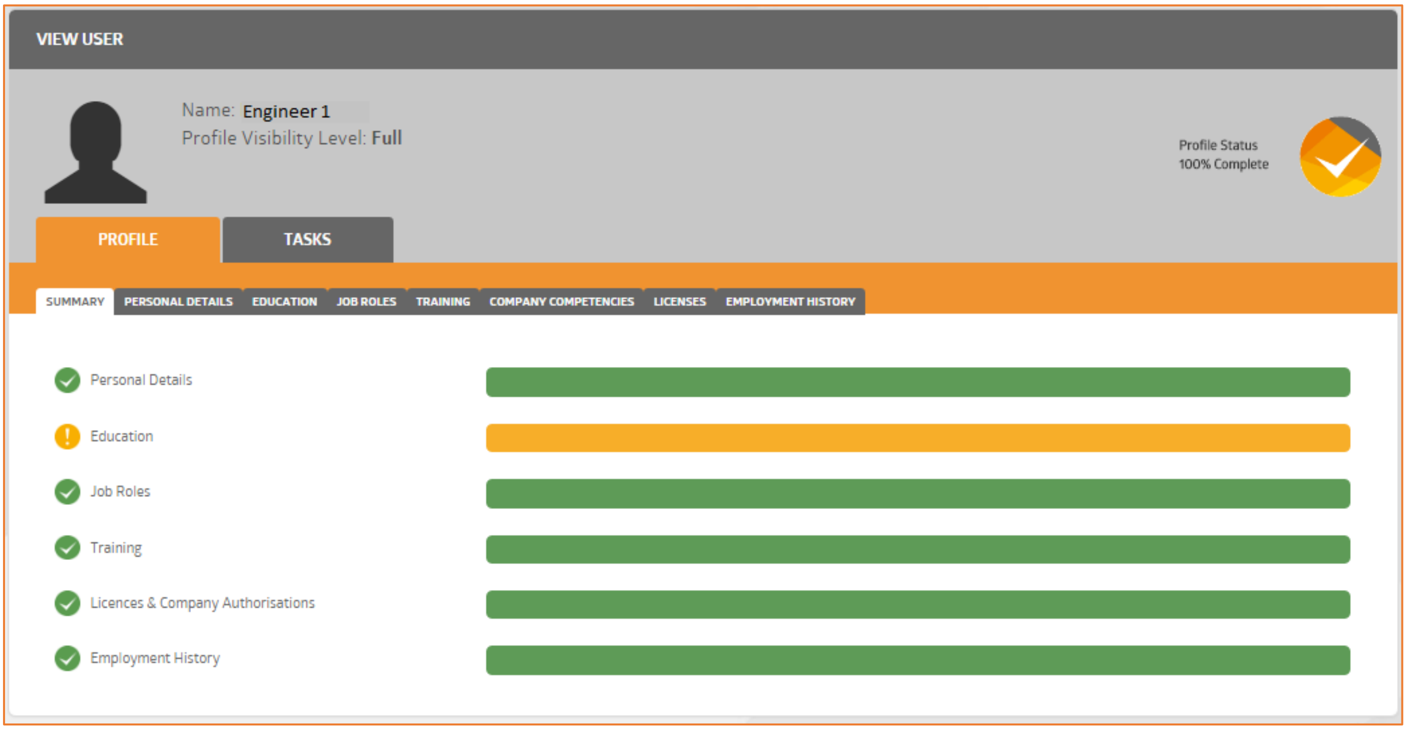


Figure 13: Profile summary screen

Selecting the '**Profile**' tab displays the user's summary screen which contains their **'Personal Details', 'Education'**, **'Job Roles'**, **'Training'**, **'Company Competencies'**, **'Licences'** and **'Employment History'.** To view any of these sections in more detail select the relevant tab or section title.

Selecting the **'Tasks'** tab produces a complete list of that user's tasks. These can be arranged and ordered using the **'Filter'** & **'Sort Order'** tabs.

Profile & Training Search

The Profile & Training Search Report checks across your Organisation for who has got the selected profile item or training qualification and when it is due to expire. The report enables you to quickly assess who would benefit from further training courses and who your best qualified engineers are. *Figure 14* below shows the report criteria selection screen.

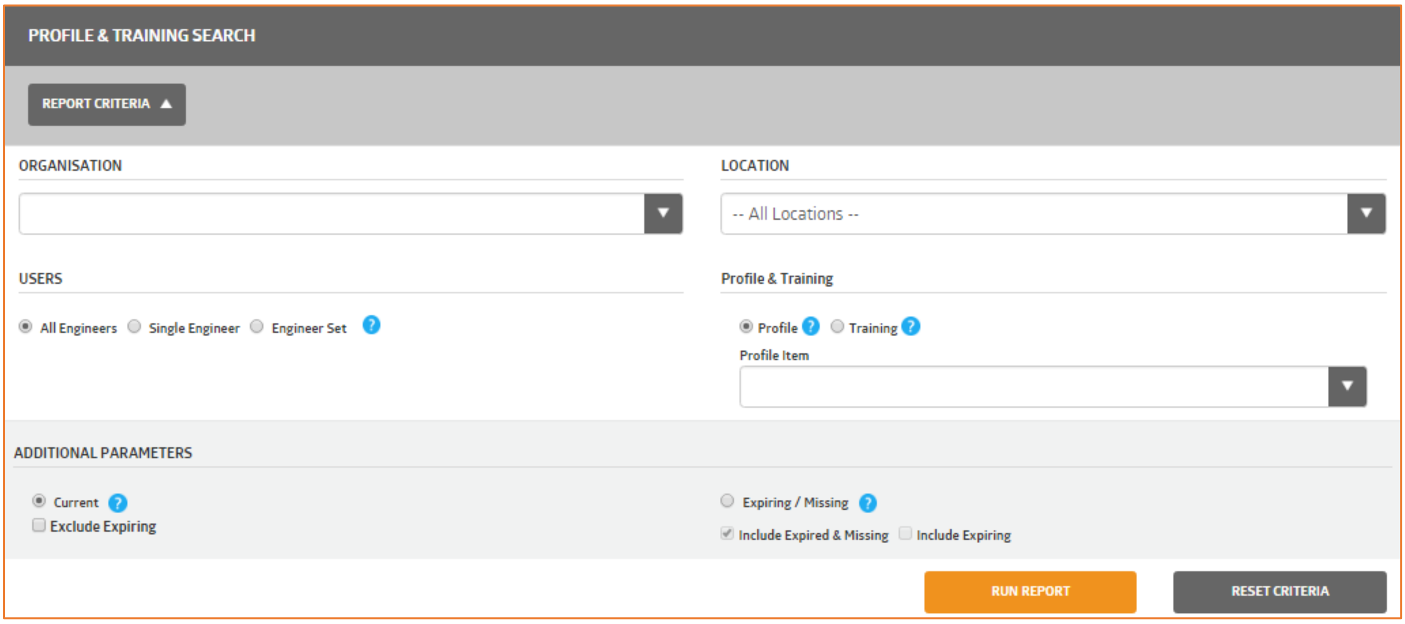


Figure 14: Profile and Training Search criteria selection screen.

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Location**: Select a location from the drop-down list or leave as default '**All Locations**'.

'Users'
Using the radio buttons, select one of the following:

- **All Engineers**: Runs the report on all the Organisation's associated engineers
- **Single Engineer**: Using this selection will open up two further drop downs
    - **Organisation Engineer**: Those users who have a current Handshake with your organisation.
    - **High-5 Engineers**: Those users who have a current High-5 with the Organisation, allowing you to assess these users before the decision to create a Handshake is made.
- **Engineer Sets**: Runs the report against a set of Engineers. Select from any pre-saved sets or create a new set.

'Profile & Training'
Using the radio buttons select one of the following:

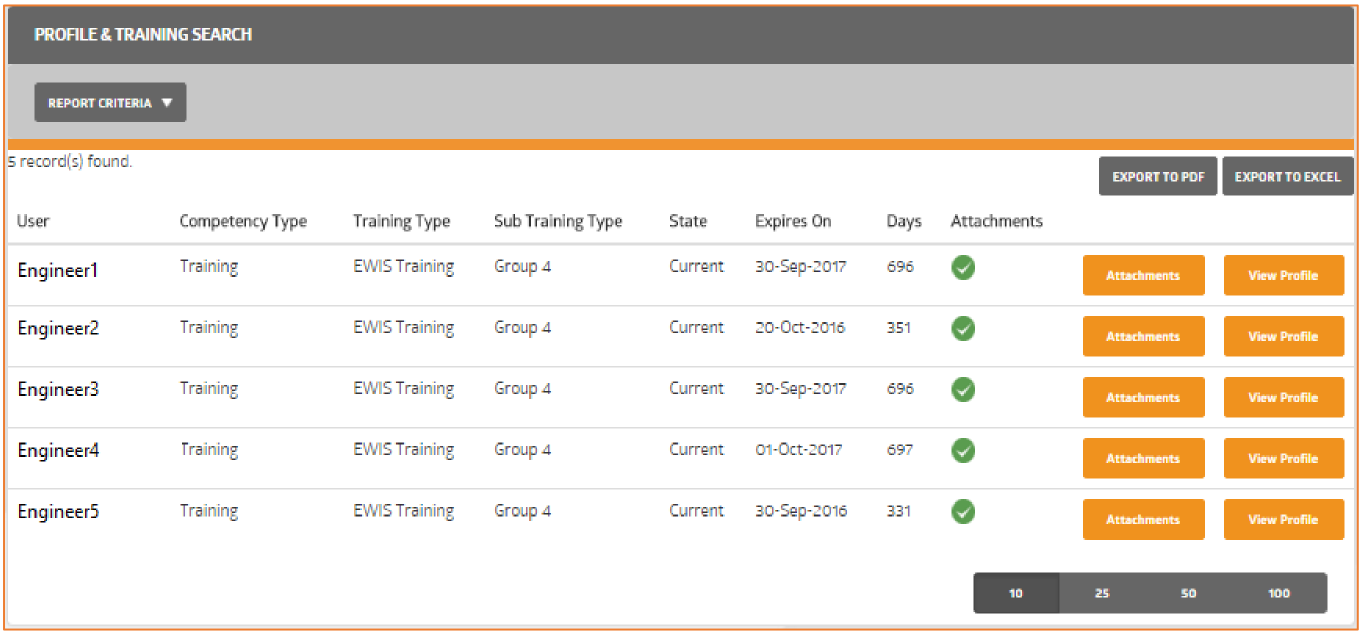
- **Profile**: Use the drop-down menu to choose a '**Profile Item'** as part of the report criteria.
- **Training:** Use the drop-down menus to include a '**Training Type'** and if applicable, '**Training Sub Type'** within the report criteria.

'Additional Parameters'
The default setting has '**Current'** selected. This includes only current records. To exclude expiring records from the report use the '**Exclude Expiring'** function.
To include only expiring/missing records select the '**Expiring/Missing'** radio button. You can then also include one, both or none of the two tick boxes below: '**Include Expired & Missing**, and '**Include Expiring.'**

Selecting '**Include Expiring'** also requires you to set the number of days or the '**Before'** date.

Once the criteria have been set select 'Run Report' to produce a screen similar to *Figure 15.*
'Reset Criteria' resets the report.

Example: This example shows 'Training Type' set as 'EWIS Training',' Training Sub Type' set as 'Group 4' and 'Current' selected:



PROFILE & TRAINING SEARCH

REPORT CRITERIA ▼

5 record(s) found.

EXPORT TO PDF EXPORT TO EXCEL

User	Competency Type	Training Type	Sub Training Type	State	Expires On	Days	Attachments		
Engineer1	Training	EWIS Training	Group 4	Current	30-Sep-2017	696	✓	Attachments	View Profile
Engineer2	Training	EWIS Training	Group 4	Current	20-Oct-2016	351	✓	Attachments	View Profile
Engineer3	Training	EWIS Training	Group 4	Current	30-Sep-2017	696	✓	Attachments	View Profile
Engineer4	Training	EWIS Training	Group 4	Current	01-Oct-2017	697	✓	Attachments	View Profile
Engineer5	Training	EWIS Training	Group 4	Current	30-Sep-2016	331	✓	Attachments	View Profile

10 25 50 100

Figure 15: Profile & Training Search Report example.

The example shown in *Figure 15* shows the following options:

'Attachments': Select to show a pop up box allowing the attachment (certificate, reference, etc.) to be viewed or downloaded.
'View Profile': Select to view the user's profile as shown in *Figure 13* in '*Staff Summary Report'* above.

'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.

Gap Analysis Report

This report displays where there are gaps in the profiles and experience records of your Organisations users. Once the report is run, selecting the orange portion of the graph will detail the gaps and who has them.

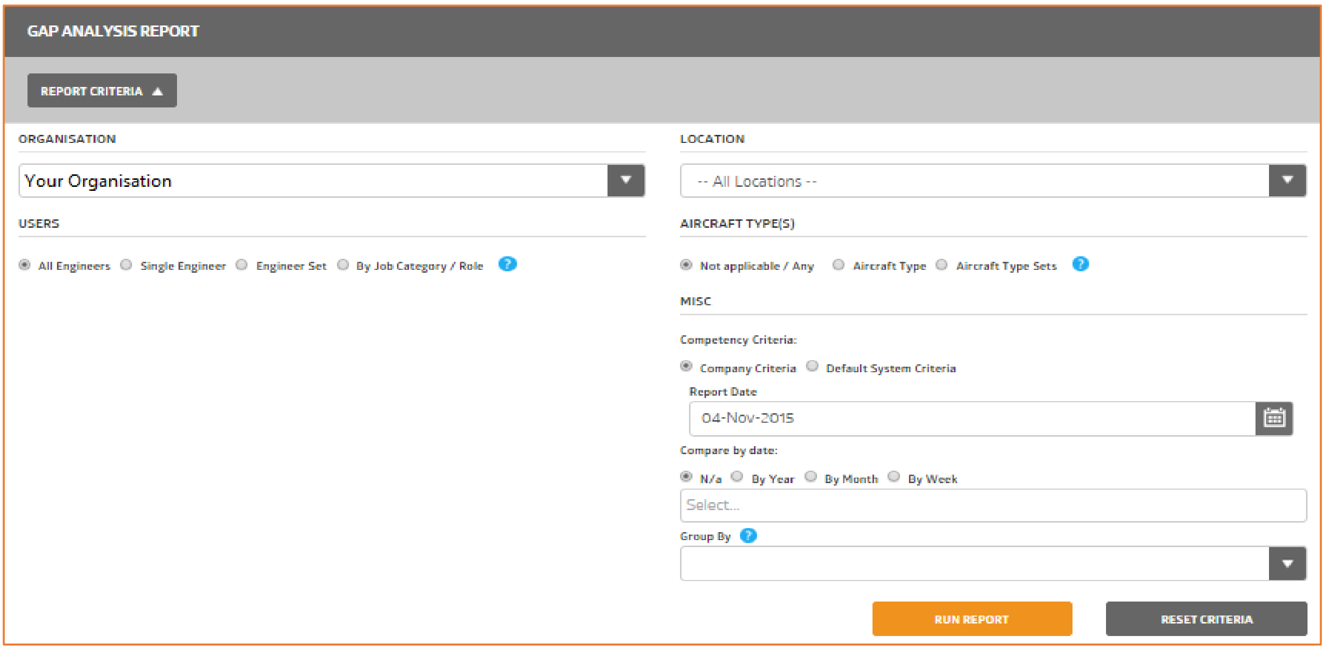


Figure 16: Management Reports, Gap Analysis Report criteria selection screen.

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Location**: Select a location from the drop-down list or leave as default '**All Locations**'.

'Users'

Using the radio buttons, select one of the following:

- **All Engineers**: Runs the report on all the Organisation's associated engineers
- **Single Engineer**: Using this selection will open up two further drop downs
  - **Organisation Engineer**: Those users who have a current Handshake with your organisation.
  - **High-5 Engineers**: Those users who have a current High-5 with the Organisation, allowing you to assess these users before the decision to create a Handshake is made.
- **Engineer Sets**: Runs the report against a set of Engineers. Select from any pre-saved sets or create a new set.

'Aircraft Types(s)'

Select one of the three radio buttons:

- **Not Applicable/Any**: Select this to run the report on any aircraft type.
- **Aircraft Type**: Start typing an aircraft type then select from the pre-populated drop down list.
- **Aircraft Type Sets**: Select from any pre-saved sets or create a new one.

'Miscellaneous.':

- **Company Criteria**: Created by your Company Administrator.
- **Default System Criteria**: Runs the report against the ELMS system default competency criteria settings.

- **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.
- **Compare by Date**: Select from **'N/A', 'Year', 'Month'** or **'Week'** then select appropriate items from the box below.
- **Group by**: Select from drop down box.

Select ‘**Run Report’** to produce the report. An example is shown in *Figure 17.*

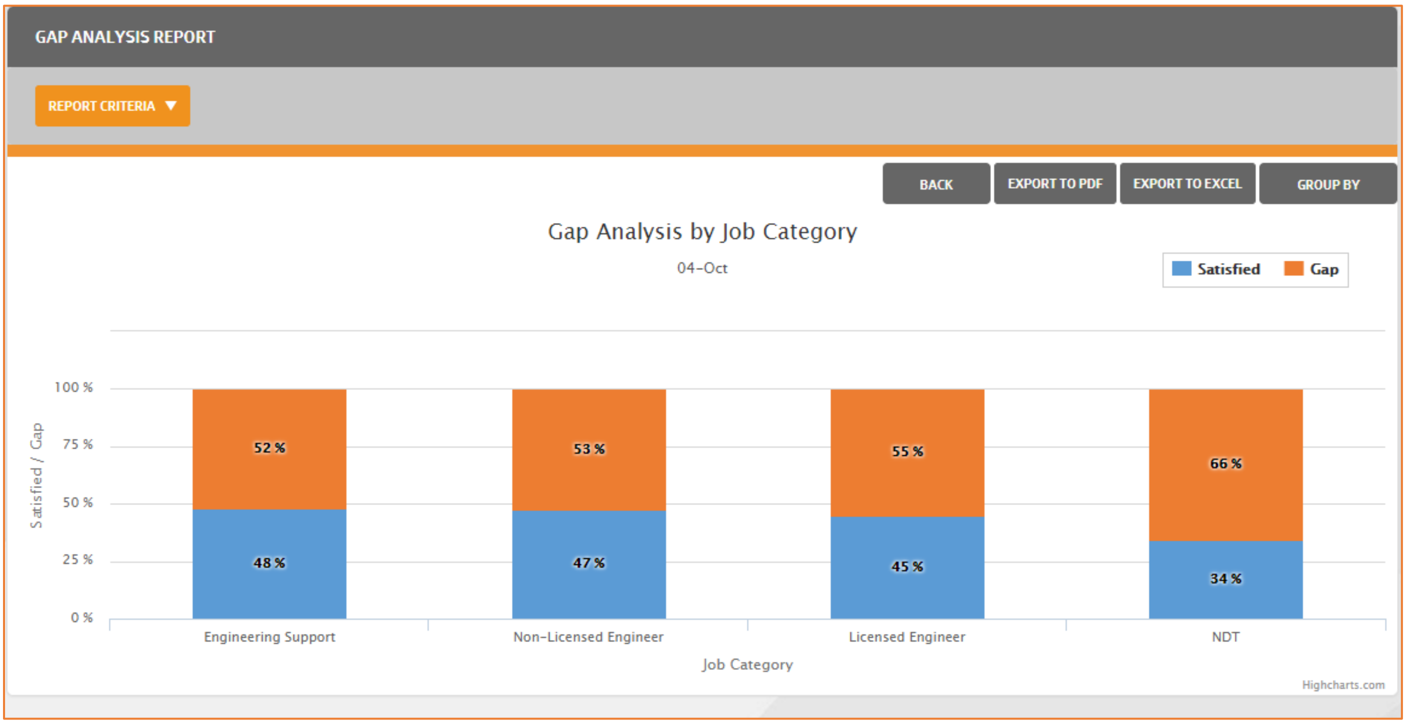


Figure 17: Gap Analysis Report example

‘Group By’: Brings up a pop-up screen of the **‘Miscellaneous.’** settings as detailed in the report criteria. You can amend these settings as required to re-run the report.

By clicking on one of the orange portion of the graph another screen opens listing all the areas where gaps have been identified as shown in *Figure 18 below*.

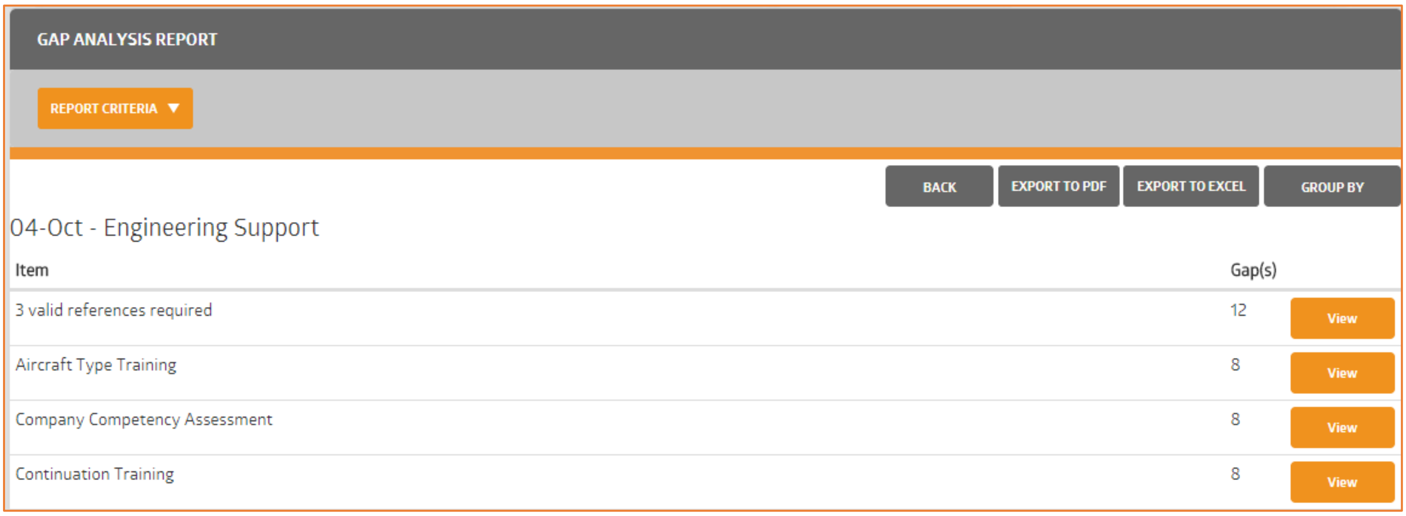


Figure 18: Example of missing profile items

By clicking ‘**View**’ next to the item you are shown which users are missing this information, see *Figure 19*.

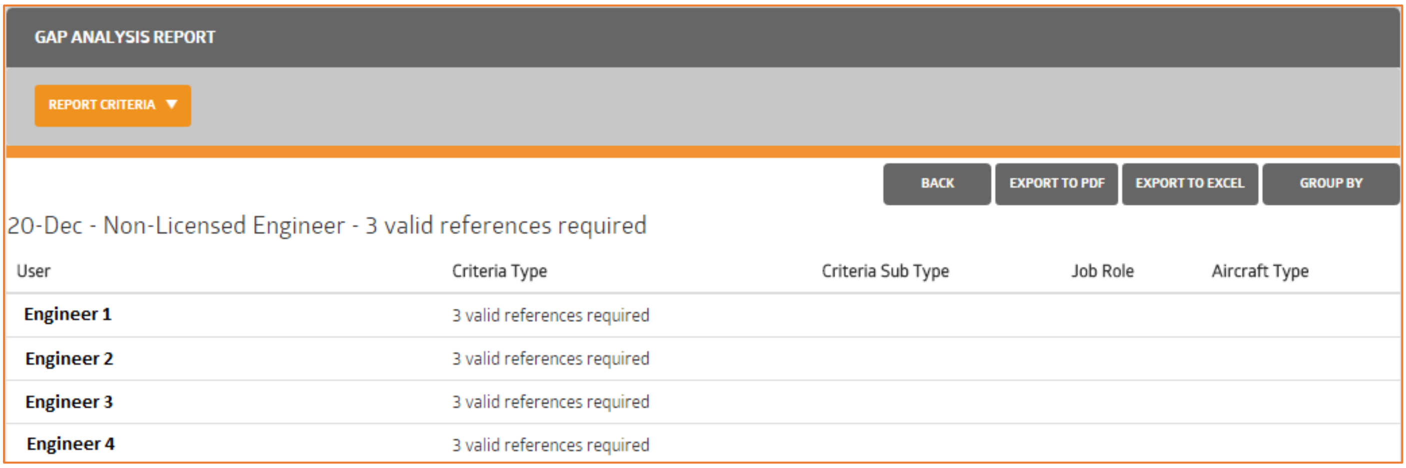


Figure 19: Drilling down into Gap Analysis information.

Click ‘**Back’** to take you back to the report criteria 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.

Resource & Competency Report

This report gives the organisation the ability to look at the 'Competency Profile' over a 12-month period in order to analyse trends. Furthermore, the 'Resource Profile' can be overlaid to aid resource planning and management.

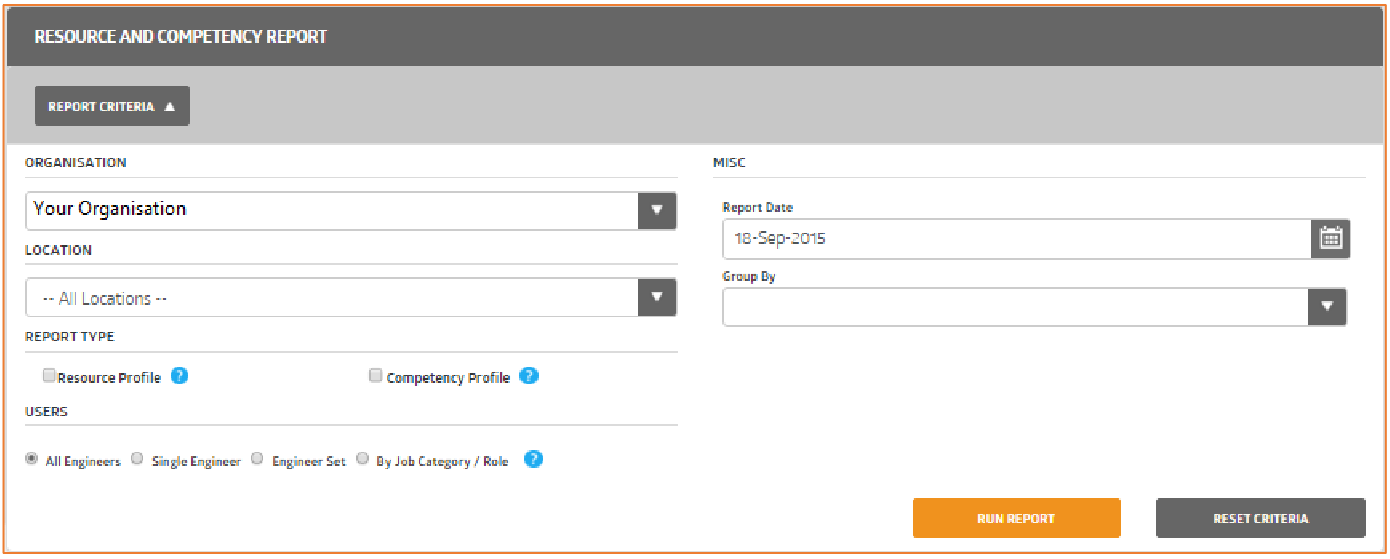


Figure 20: Resource & Competency Report criteria selection screen

The criteria fields for the report are as follows:

- **Organisation**: Choose the Organisation you wish to run the report against from the drop-down list.
- **Location**: Select a location from the drop-down list or leave as default '**All Locations**'.

Miscellaneous - 'Report Date': Select or enter the date (must be equal or before the current date), and '**Group by'**: use the drop-down menu to select an option.

- **Report Type:** Select one or **both** tick box options:
  - **Resource Profile:** Select this to run the report showing manpower levels across the locations.
  - **Competency Profile':** Select this to run the report showing competency and to select the criteria for the competency. **Competency Profile:** produces the following additional parameters:

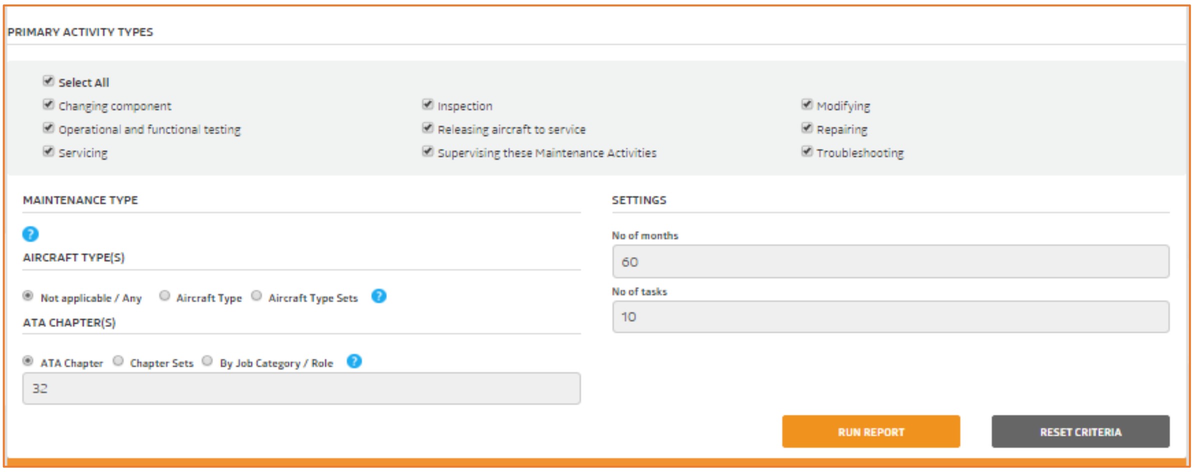


Figure 21: 'Competency Profile' parameters

- **Primary Activity Types:** This section contains a series of tick boxes; select one or more from the options shown or tick **'Select All'.**
- **Maintenance Type**: Select from the drop-down list.

'Aircraft Types(s)'
Select one of the three radio buttons:

- **Not Applicable/Any**: Select this to run the report on any aircraft type.
- **Aircraft Type**: Start typing an aircraft type then select from the pre-populated drop down list.
- **Aircraft Type Sets**: Select from any pre-saved sets or create a new one.

'ATA Chapter/Chapter Sets/Job Category/Roles'
Select one of the following using the radio buttons:

- **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.
- **Job Category/Role**: Click in the box to select from the pre-populated drop down list.

- **Settings**: Enter the '**Number of Months'** that the report is over and the **'Number of Tasks'** used for assessment. These are adjustable but the default setting is 60 and 10 respectively.

'Users'
Using the radio buttons, select one of the following:

- **All Engineers**: Runs the report on all the Organisation's associated engineers
- **Single Engineer**: Using this selection will open up two further drop downs
  - **Organisation Engineer**: Those users who have a current Handshake with your organisation.
  - **High-5 Engineers**: Those users who have a current High-5 with the Organisation, allowing you to assess these users before the decision to create a Handshake is made.
- **Engineer Sets**: Runs the report against a set of Engineers. Select from any pre-saved sets or create a new set.

'Job Category/Role': If this is ticked it opens two drop down menus, **'Category'** and **'Job Role/Method'**.

Click **'Run Report'** to produce a report screen similar to *Figure 22 below*.

➢ Resource & Competency Report (Example 1).

The example is based on a **'Primary Location', 'Resource Profile'** and **'All Engineers', 'Grouped by' 'Job Category'**. Moving the mouse over each month will display a pop up box with details for that month.

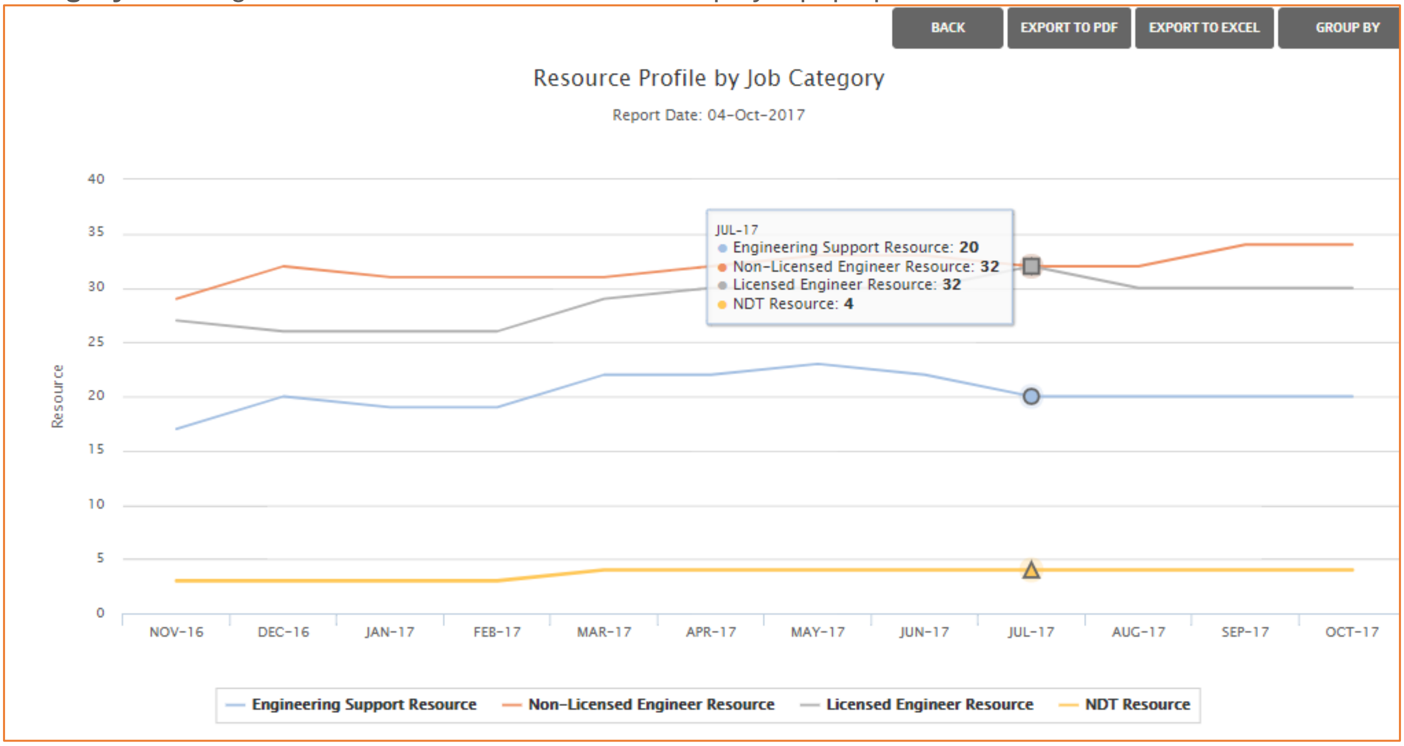


Figure 22: Resource & Competency Report

- Example 2 is based on a **'Primary Location', 'Competency Profile'** and **'All Engineers', 'Grouped by' 'Job Category',** with **'Primary Activity'** of **'Changing Component', 'Any Aircraft', 'ATA 10'**, over **60 months** and **10 tasks**.

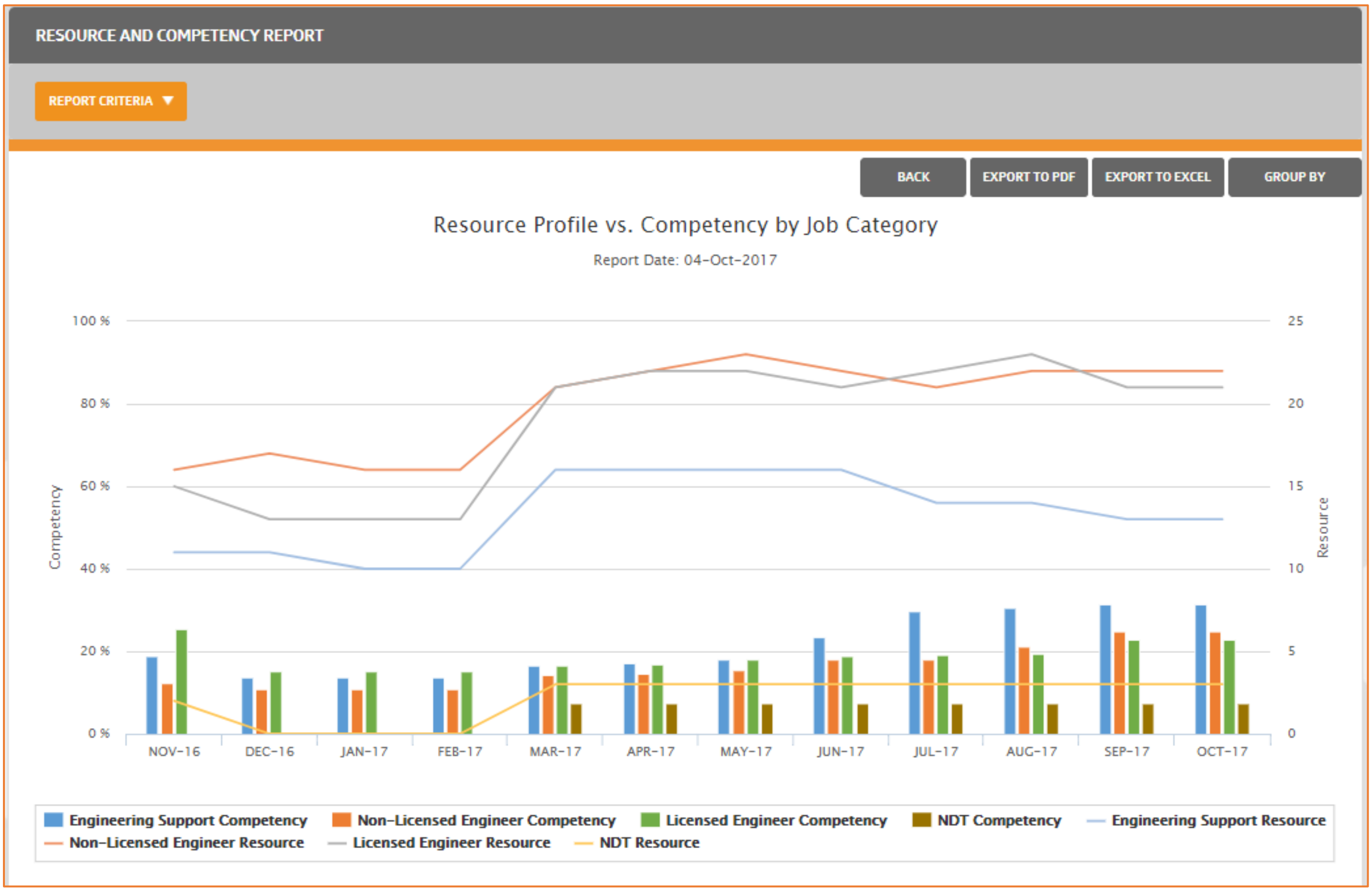
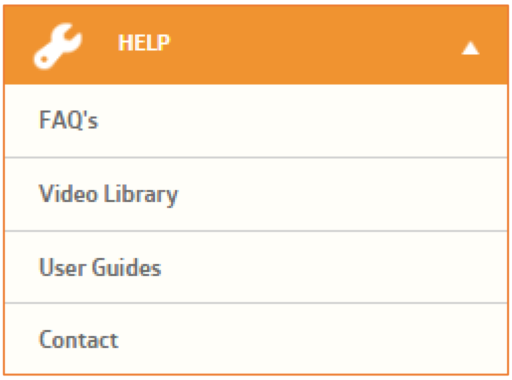


Figure 23: Resource & Competency Report – Example Two

ELMS® PREVENTING TOMORROW'S RISKS

Chapter 2: 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).