User Guide:
Bespoke Competencies

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Introduction

ELMS Aviation recommends the use of the EASA GM 2 145.A.30(e) Competence assessment procedure for extra guidance when designing company competencies.

This part of the user guide provides Organisations with the guidance necessary to configure and build company competencies and assessments within the ELMS application

Chapter 1: Company Competency Definitions

Creating Company Competencies

Only a Company Administrator (CA) user can create and edit company competencies and only Quality Assurance (QA) and Manager permission holders can assess and assign competencies against users.

When designing your competency matrix and structure, there are five main areas that make up the process;

1. Planning
2. Competency structure
3. Adding criteria to a competency
4. Editing the application's default '**Job Role Competency Definition**'
5. Creating a "Job Role Competency"

Planning

The first step to consider when creating company competencies within ELMS is to consider the competency requirements of your Organisation and how they pertain to particular job roles that will be recognised within the application. This exercise requires you to map out the job roles within your Organisation and to define the individual competencies and training requirements that relate to each role.

Competency Structure

The ELMS competency builder utilises 2 different competency types:

1. **Standard** – Standard competency items are typically competencies that are demonstrable by way of knowledge or behaviour e.g. "Knowledge of relevant parts of Maintenance Organisation, Exposition and Procedures"
2. **Training** – Training competencies require an individual to have attended and/or passed/completed a training event or course e.g. "Working at heights training course"

When you create a competency, you will first be asked to give it a name and select whether it is a **Standard** or **Training** competency. See *Figure 1*.

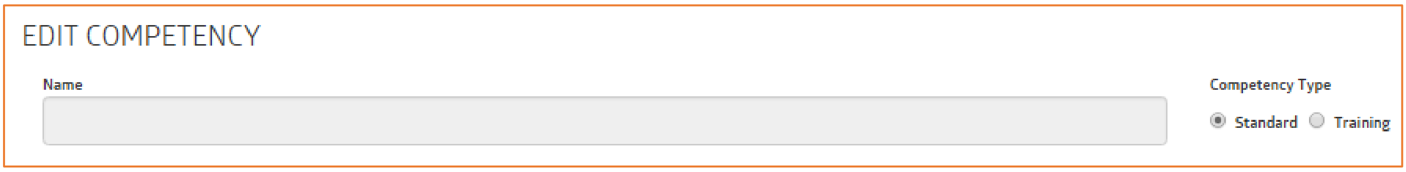

Figure 1 – Naming and selecting the type of Competency

Examples:

- "Working at Heights Training" (for generic competencies, those that could be required by several departments)
- "Workshop – Ability to carry out a Composite Repair" (for a workshop specific competency)
- "Engine Bay – CFM56 Engine Overhaul" (for an engine bay specific competency)

You will then have to determine whether the competency has any dependencies such as:

- Is it aircraft type specific?
- Does it have an expiry date?
- Will it require an attachment?
- Does it require a set number of training hours? (Specific to training items)

If the answer to any of these questions is **yes,** then you will need to tick the relevant box in the **'Requires'** section of the competency builder. See *Figure 2.*

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Figure 2 – Editing your competency

In the **'Description'** box you can enter more details of the competency such as whether it is a "Training Course", "Experience Assessment", "OJT Assessment" or any other details. This isn't a compulsory field and is only shown when viewing the competency.

Adding Criteria to a Competency

Once you have decided on the structure of your competency you now need to add criteria to it. The criteria can be any items from the ELMS personal profile structure such as '**Licences**', '**Authorisations**', '**Type Ratings'** or '**Passport**'. '**Training**' section items can be broken down into individual components such as '**EWIS'** or '**SFAR88'.** You can also add a previously created Company Competency. The criteria items can be selected from the drop-down list which appears when the **'ADD'** button, under the criteria window, is selected. See *Figures 3 and 4.*

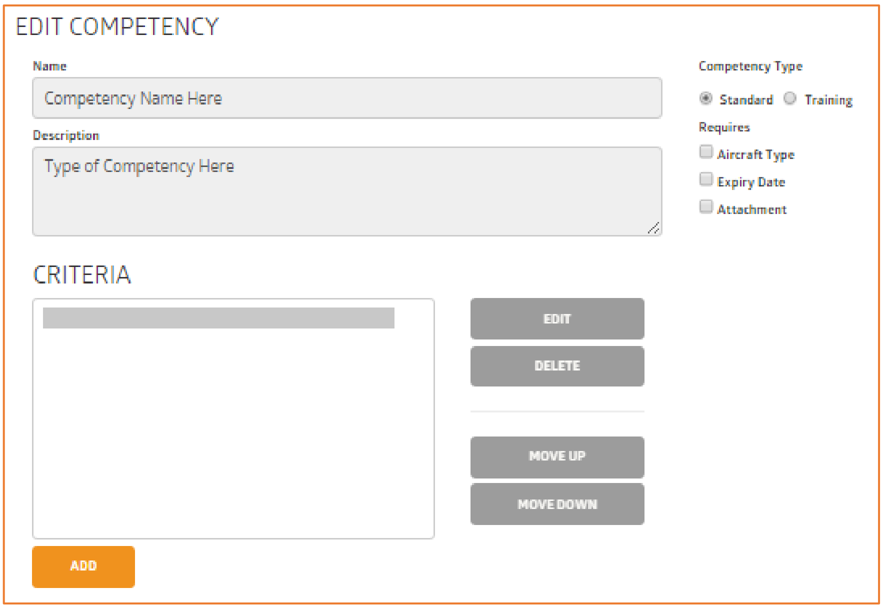

Figure 3 – Adding Competency Criteria

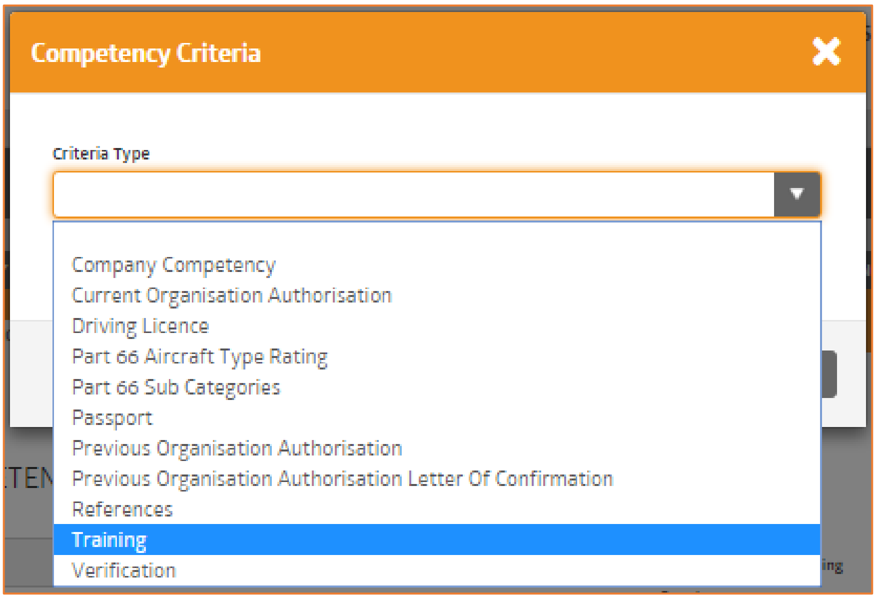

Figure 4 – Adding Competency Criteria

To add a pre-populated training competency (i.e. one which already exists in the ELMS application), first select '**Training**' under the **'Criteria Type'** heading and then select the type (such as '**EWIS'**) and subtype (such as '**Group 4'**) from the dropdown boxes that appear. See *Figure 16*.
For some training items, you can select the '**Allow Alternative Sub Type'** option which allows you to set an **"**either/or" requirement (such as '**EWIS Group 4'** or '**EWIS Group 1**'). See *Figure 5*.

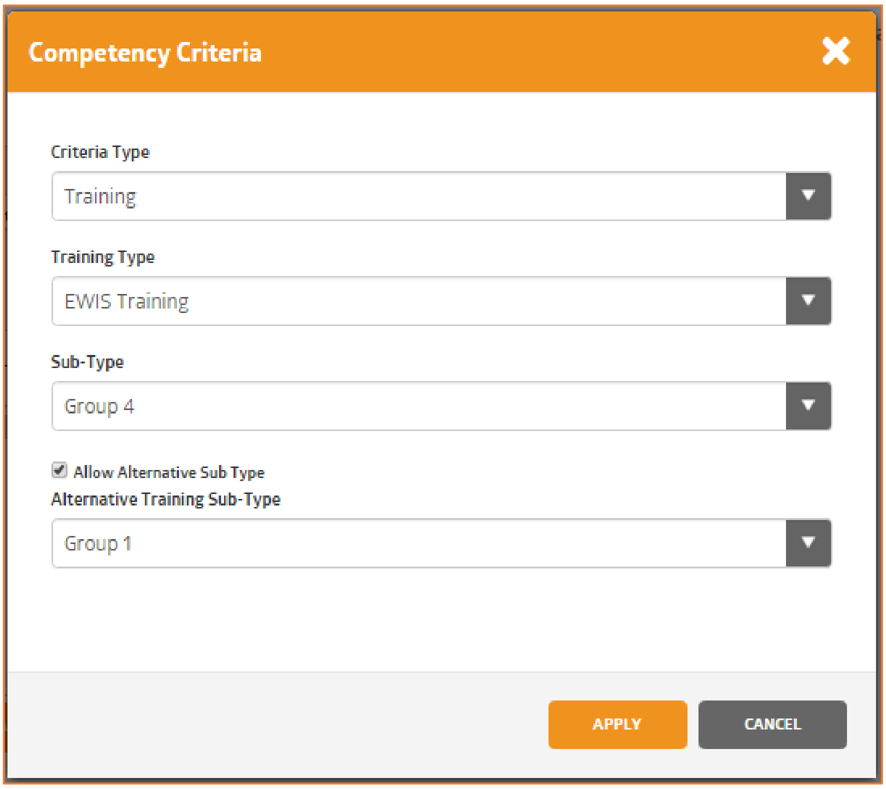

Figure 5 – Adding a training competency

In addition to the above, there is a **'Verification'** competency criteria type. This is designed to allow an Organisation to create a competency that doesn't reference any data/item already held within the profile of ELMS users. When selected, it opens two additional fields which allows you to give the verification competency a title and specify the verification details; see *Figure 17*.
In the **'Title'** box, ELMS recommend that you put what type of verification is being applied. As an example; "Training Course", "Experience Assessment", "OJT Assessment", "Documentation Check" or a combination if more than one type is required.

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In the '**Details'** box ELMS recommend you specify which check you wish to be made and will the competency require a specific requirement. This could be aircraft type or number of training hours. An example is shown in *Figure 6.*

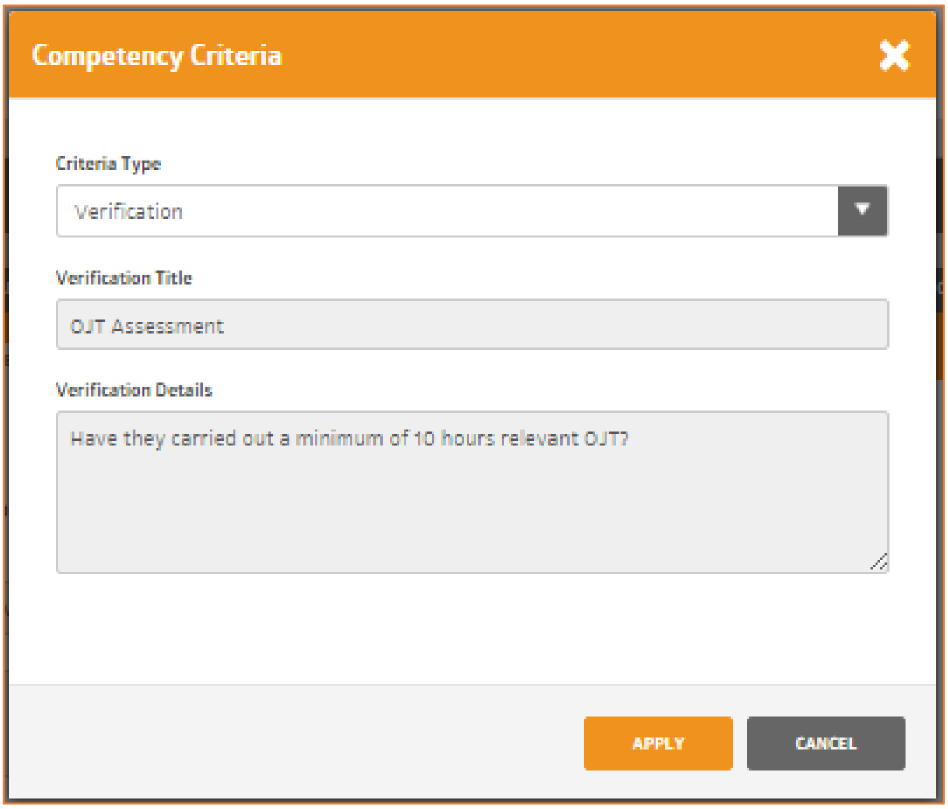

Figure 6 – Adding a verification

When you have filled out the required fields, select '**Apply'** and the criteria is then added to that competency. After you have repeated the above for all the required criteria select the '**Save'** button at the bottom of the page. That competency will now be saved in '**Draft**' format.

Whilst it is in draft format, a competency can still be edited, copied or removed but for a competency to be assigned or assessed against a user, it must first be published. Please note that once a competency has been published it can no longer be edited so it is good practice to review a competency before publishing it.

Once a competency has been published it can also be added as a criteria item to another competency. To do this first select '**Add'** below the '**Criteria'** window and then select '**Company Competency'** from the drop-down menu, shown in *Figure 7*.

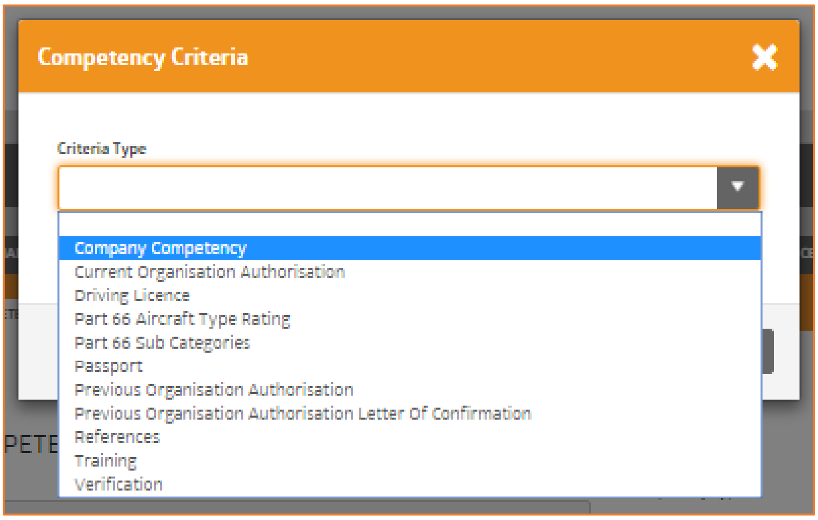

Figure 7 – Adding a Company Competency

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You can then select the company competency that you have created. An example list can be seen below in *Figure 8.*

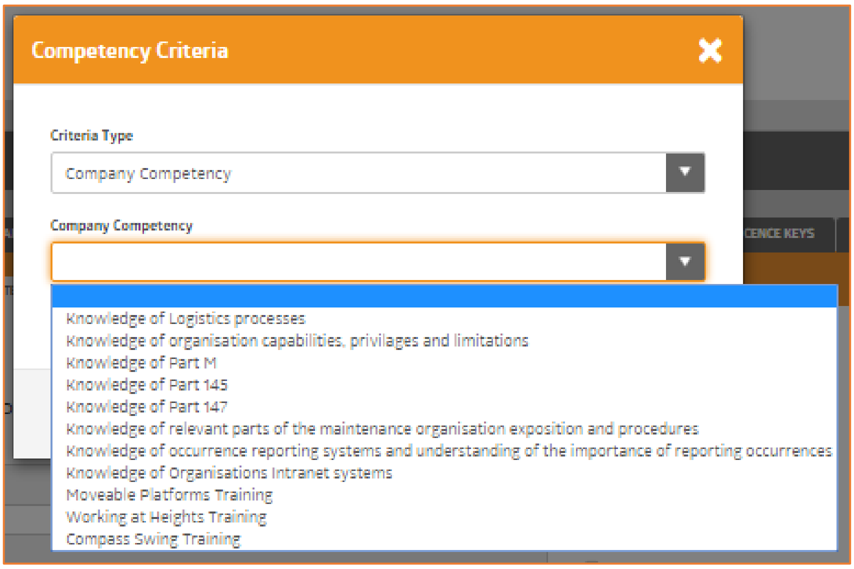

Figure 8 – Example of Company Competencies

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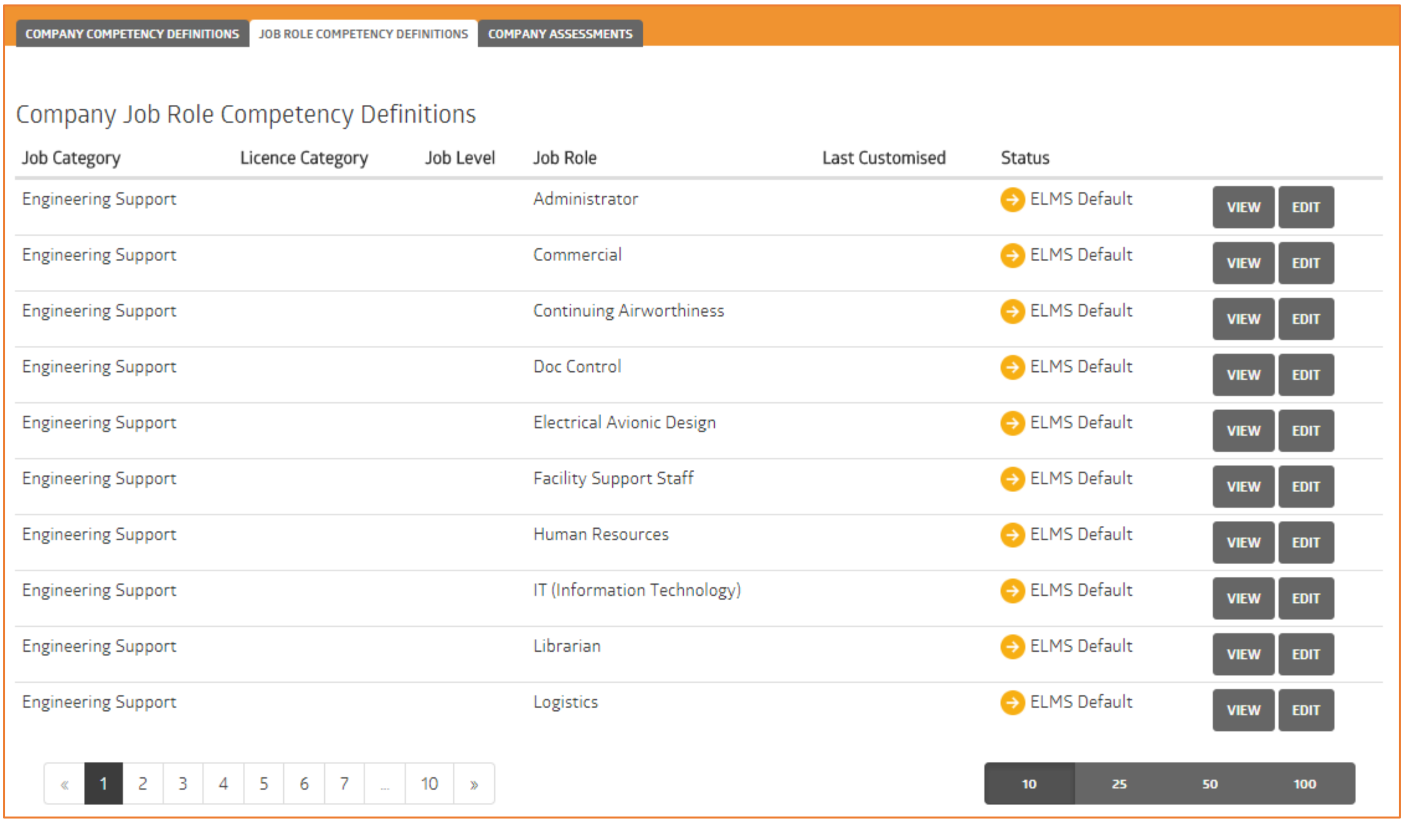
Chapter 2: Editing Job Role Competency Definitions

A Company Administrator can adjust the ELMS application default settings for '**Job Role Competency Definitions**' and can create a Company/Organisation specific competency definition for each of the ELMS application job roles. These definitions are the application's competency requirements for each job role within the application.

To edit the '**Job Role Competency Definitions**' go to the left-hand menu and select '**Manage Organisation'** and select '**View Organisation**'. Select the '**Competency'** tab and finally the '**Job Role Competency Definitions'** tab and you will see the screen shown in *Figure 9.*



Job Category	Licence Category	Job Level	Job Role	Last Customised	Status	
Engineering Support			Administrator		ELMS Default	VIEW EDIT
Engineering Support			Commercial		ELMS Default	VIEW EDIT
Engineering Support			Continuing Airworthiness		ELMS Default	VIEW EDIT
Engineering Support			Doc Control		ELMS Default	VIEW EDIT
Engineering Support			Electrical Avionic Design		ELMS Default	VIEW EDIT
Engineering Support			Facility Support Staff		ELMS Default	VIEW EDIT
Engineering Support			Human Resources		ELMS Default	VIEW EDIT
Engineering Support			IT (Information Technology)		ELMS Default	VIEW EDIT
Engineering Support			Librarian		ELMS Default	VIEW EDIT
Engineering Support			Logistics		ELMS Default	VIEW EDIT

Figure 9 - Job Role Competency Definitions

Select the '**Edit'** button on the '**Job Role Competency Definition**' you wish to edit and a screen similar to *Figure 10* will open allowing you to '**Add'** new items or '**Delete'** some of the preloaded items.

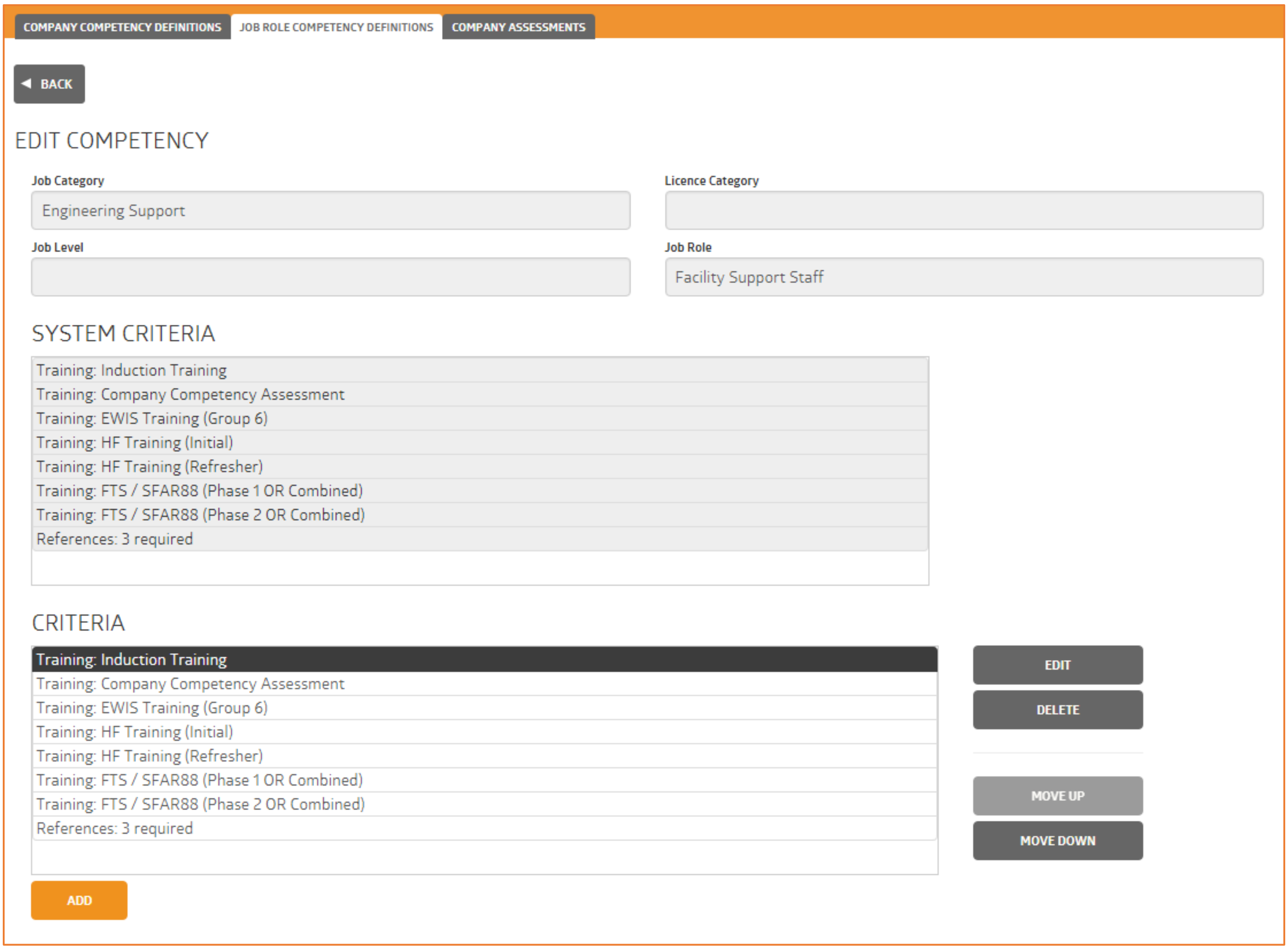


Figure 10 – Editing Job Role Competency Definitions

To add a company competency to a '**Job Role Competency Definition**' select the '**Add'** button, select '**Company Competency'** from the drop-down menu and then select the competency you want to add from the list.

Once a '**Job Role Competency Definition**' has been edited, its status changes from '**ELMS Default'** to '**Customised'**, giving the date of the last customisation and also the option to '**Restore ELMS Default'**. This is shown in *Figure 11*

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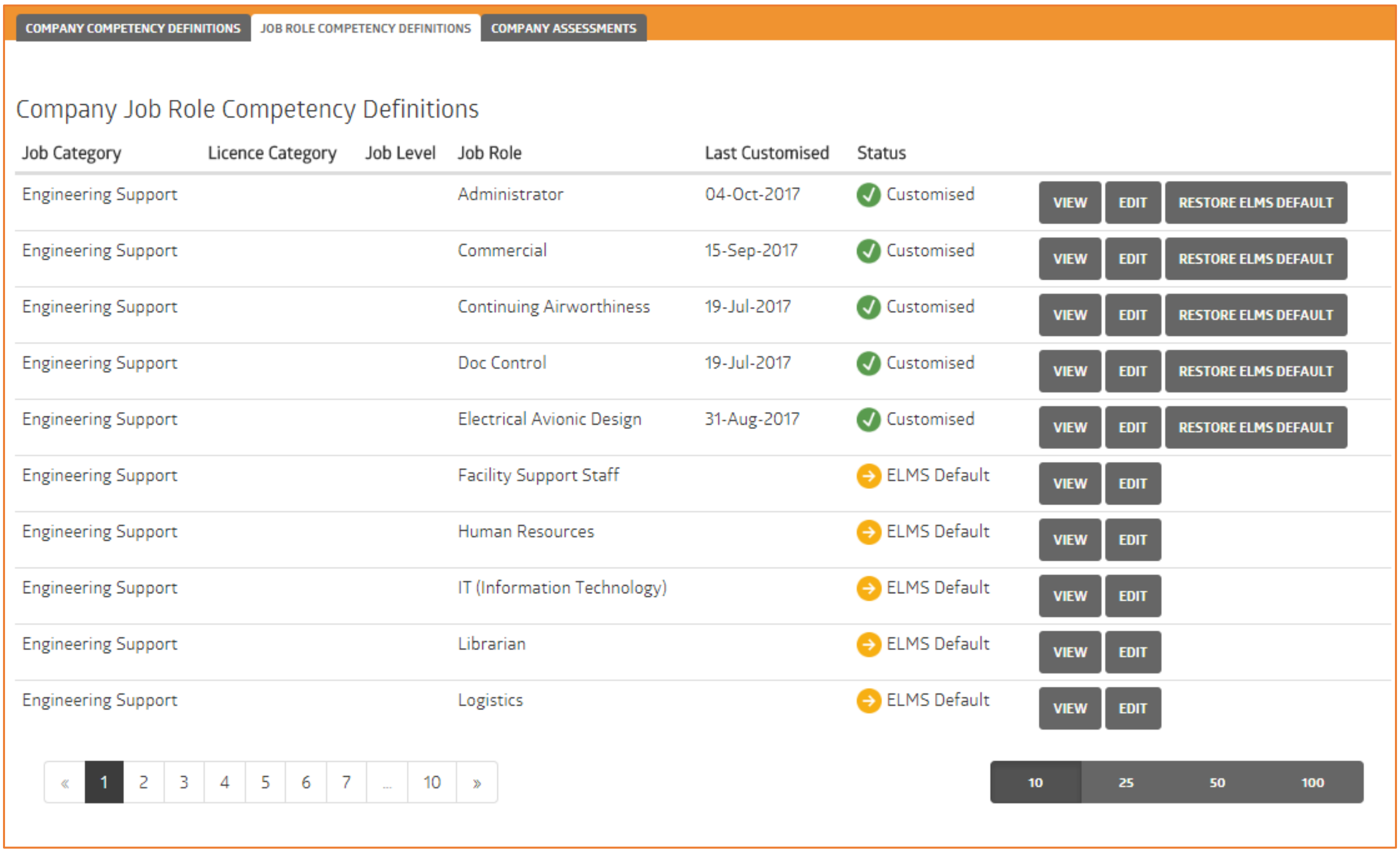
COMPANY COMPETENCY DEFINITIONS | JOB ROLE COMPETENCY DEFINITIONS | COMPANY ASSESSMENTS

Company Job Role Competency Definitions

Job Category	Licence Category	Job Level	Job Role	Last Customised	Status	
Engineering Support			Administrator	04-Oct-2017	Customised	VIEW EDIT RESTORE ELMS DEFAULT
Engineering Support			Commercial	15-Sep-2017	Customised	VIEW EDIT RESTORE ELMS DEFAULT
Engineering Support			Continuing Airworthiness	19-Jul-2017	Customised	VIEW EDIT RESTORE ELMS DEFAULT
Engineering Support			Doc Control	19-Jul-2017	Customised	VIEW EDIT RESTORE ELMS DEFAULT
Engineering Support			Electrical Avionic Design	31-Aug-2017	Customised	VIEW EDIT RESTORE ELMS DEFAULT
Engineering Support			Facility Support Staff		ELMS Default	VIEW EDIT
Engineering Support			Human Resources		ELMS Default	VIEW EDIT
Engineering Support			IT (Information Technology)		ELMS Default	VIEW EDIT
Engineering Support			Librarian		ELMS Default	VIEW EDIT
Engineering Support			Logistics		ELMS Default	VIEW EDIT

« 1 2 3 4 5 6 7 ... 10 »   10 25 50 100

Figure 11 – Customised Job Role Competency Definitions are shown with a green tick symbol

These ‘**Job Role Competency Definitions**’ are used by the application when running reports which include a Job Role in the criteria.

Creating a Job Role Competency

If the default job roles within ELMS does not cover all the roles within your organisation you can create a “Job Role Competency” using the competency builder and then assign that competency to a user.
It is important to note that you have to build the “Job Role Competency” in reverse order in that any competency criteria items you wish to include, that are not records from within the ELMS application, will have to be created and published as company competencies first.

A “Job Role Competency” is really only a standard company competency you assign to a user(s) who carry out that particular job role within your organisation. It is created in exactly the same way as any other company competency and then given a “Job Role” name.

The following is an example of a “Job Role Competency” and *Figure 23* illustrates how this would look within the application.

Organisation Engineer
(This is the name of the Job Role Competency and would be a Standard competency)

The criteria for that “Job Role Competency” are:

- Induction Training
  (This references a training item already in the ELMS application)
- Continuation Training
  (This references a training item already in the ELMS application)
- Knowledge of Organisations Intranet applications
  *(This would be a Standard competency *)*
- Working at Heights Training
  *(This would be a Training competency *)*
- Moveable Platforms Training

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*(This would be a Training competency *)*

Note: Items marked with a *asterisk* * symbol would require to be created as company competencies and published before they could be added to another competency as a criteria item.

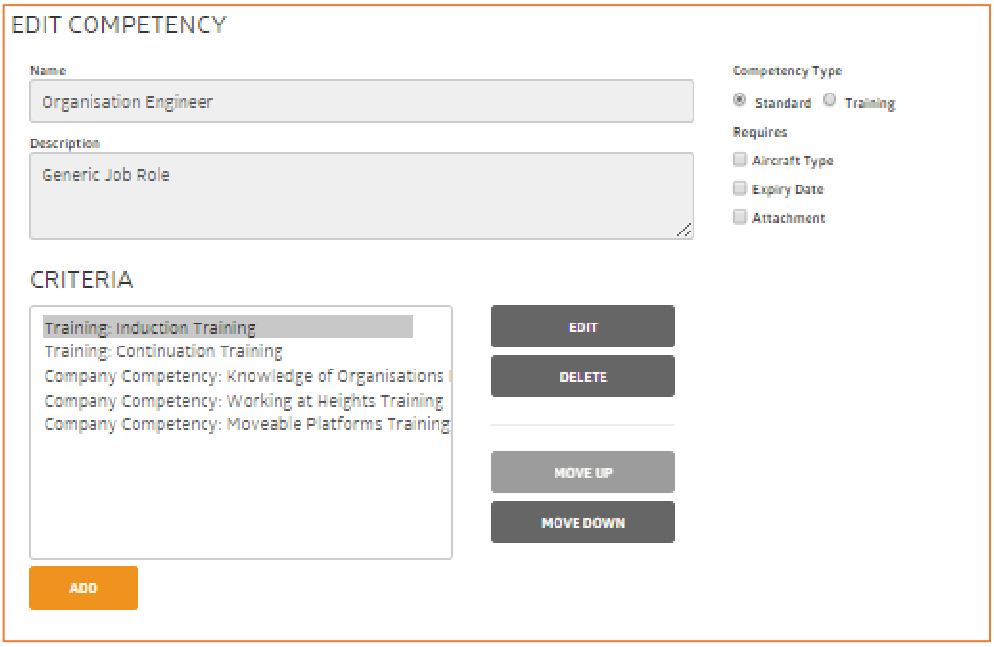

Figure 12 – Creating a Job Role as a Competency

Chapter 3: Competency Assessments

Creating a Company Assessment (CA user):

From the dashboard of the application select;

- ➔ Manage Organisation
- ➔ View Organisation
- ➔ **Competency** tab
- ➔ **Company Assessments** tab

The company assessments tab will present an interface that is similar to that of the Competency Builder.

The company assessment editor window will allow the CA permission holders to create 2 types of items:

- Company Assessments
- Subjects

To create a Company Assessment, a CA must first create a **Subject** (or many subjects) to add to the **Assessment**. To do this, use the orange 'ADD' button at the bottom of the page.

The page allows you to assign a title, description and define the scoring schema. The scoring schema will be accessible when carrying out the assessment. Additionally, the subject criteria editor will allow you to specify whether the subject criteria requires an expiry date and/or an attachment.
Once a subject criteria or multiple subject criteria have been created, they can be added to a company assessment.

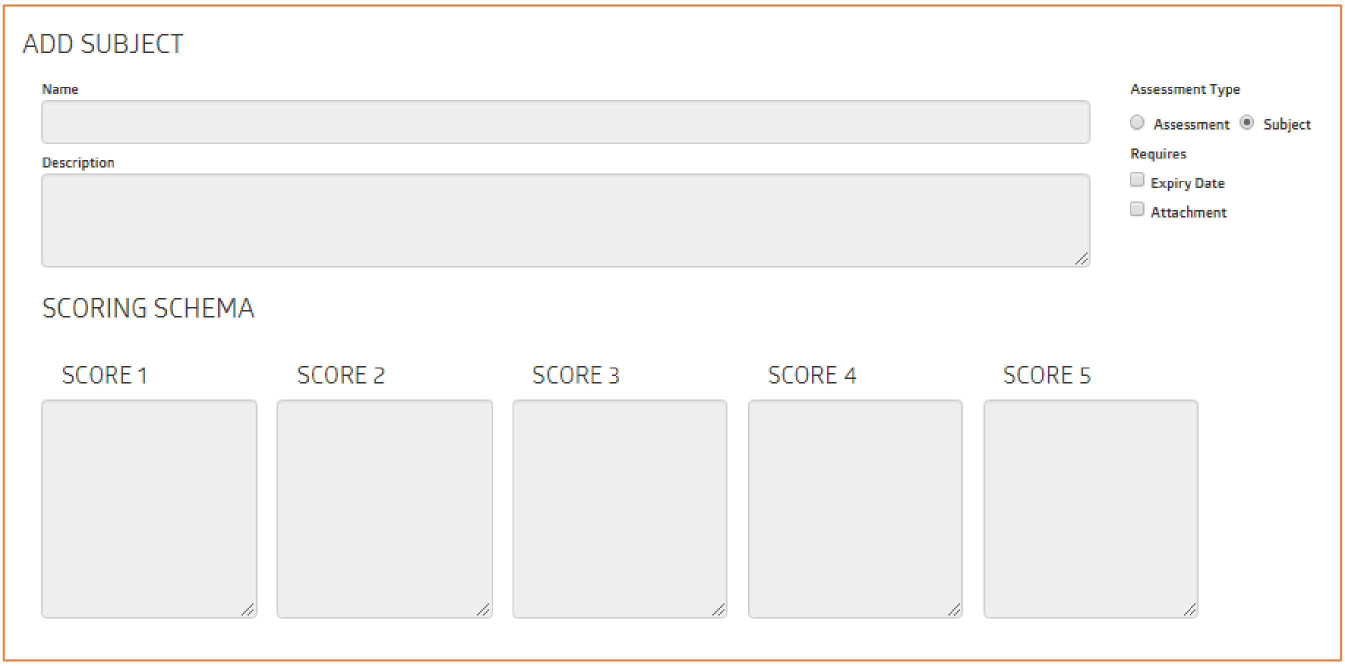

Figure 13. - Adding a Subject

Subjects will automatically be added with a status of 'draft' and will need to be published before they can be utilised within the assessments. Whilst in this state, they can be edited, copied and deleted.

Once published, a subject can only be viewed, copied or removed.

Within the company assessment editor window, with the **Assessment** radio button selected, the interface will revert to that shown in Figure 14.

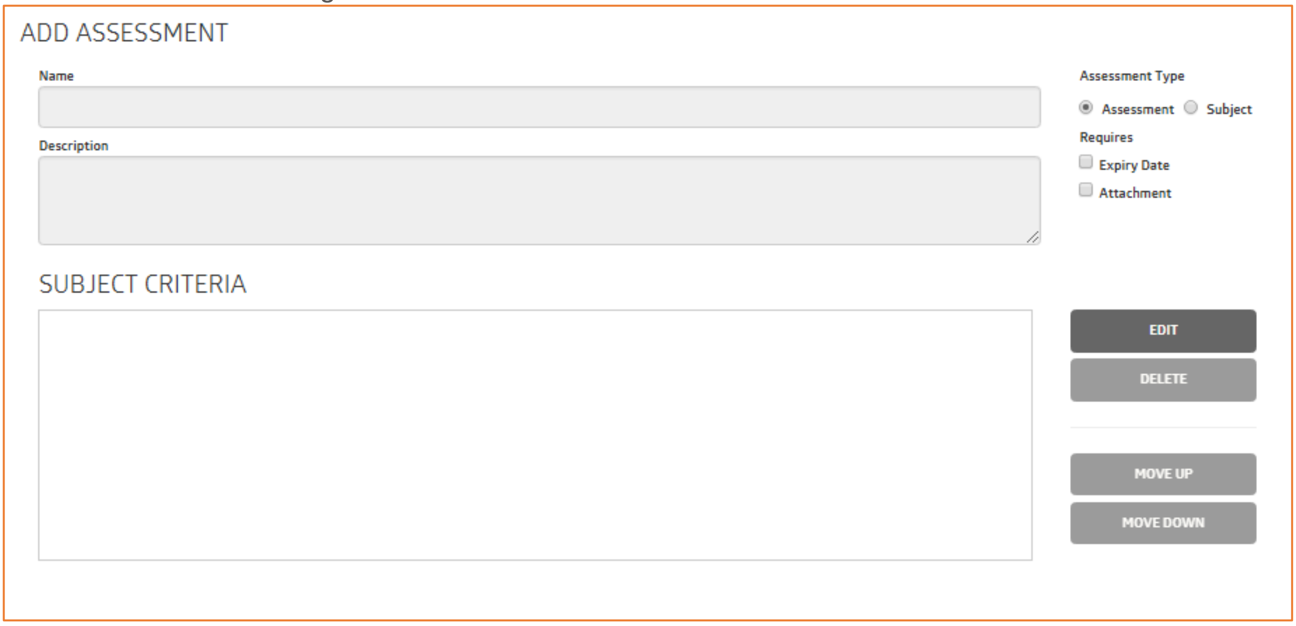

Figure 14 – Adding an Assessment

This page will allow you to create an assessment by issuing it a title, description and by selecting the relevant subject criteria to be included within the assessment.

Once added, you will see a list of created Company Assessments and Subjects with the ability to action current assessments. If using this for the first time, no assessments will be shown.
Once assessments have been added, the screen will also show the date and user that last updated each competency assessment/subject in addition to its status.

Each competency assessment and subject can have the following function buttons associated with it;

- **View** – Provides you with a view of the assessment details or subject criteria details.
- **Edit** – Allows you to edit the details of the assessment or subject criteria. If an assessment or subject criteria is edited, the date that it was updated and the individual who updated the item will be included in the details within the company assessment List.
- **Copy** – Creates a new copy of the item with identical criteria and adds it to the list. You will be required to give the new item a name. It is not possible to give an assessment or subject criteria the same name as an existing item within your organisation's Assessment/Subject list unless the existing item has a state of removed.
- **Remove** – Removes the item from the list. A confirmation pop-up will appear (Are you sure you want to remove this Assessment item? YES/NO).
    - Removed items are accessible via an option at the top of the list to "View removed items" - Items with a state of removed have a **Restore** button that would allow permission holders to restore them to a live published state. If the restored item has the same name as an existing, published or draft item, you will be forced to rename the item.
- **Publish** – This will add the assessment to the list of assessments that can be assigned to a user, or in the case of subject criteria, add them to the list of subject criteria that can be selected in the drop down.

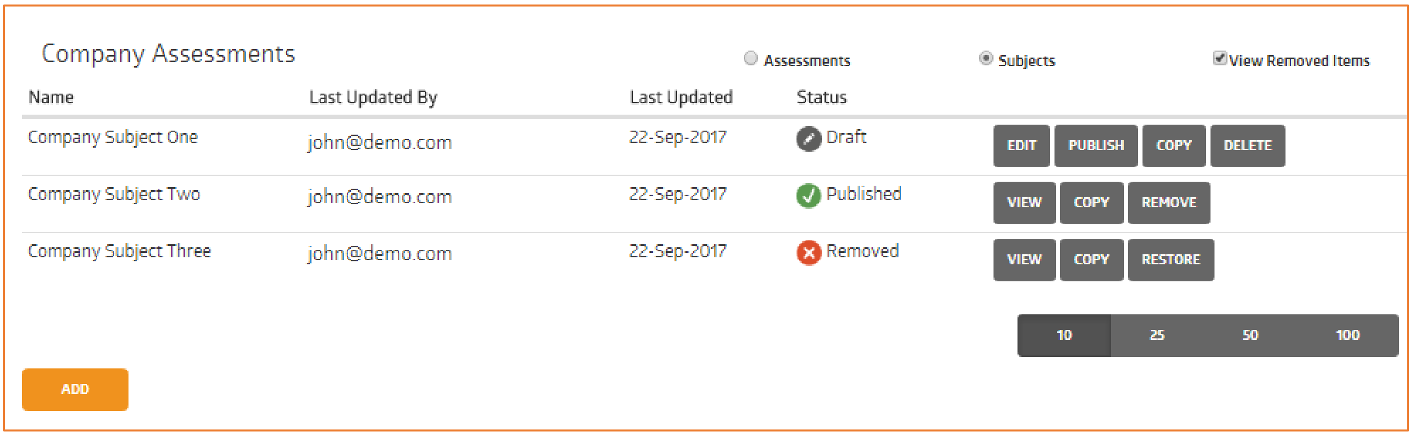

Figure 15 – Viewing Company Assessments

Assigning and Assessing a Company Assessment

As a **QA** or **Manager** permission holder: *[Note Supervisors can Assess yet not assign]*

- ➔ Manage Organisation
- ➔ View Users
- ➔ Select a user
- ➔ Manage User

Select the **Company Assessments** tab. [alongside the Assigned competencies and Training & Authorisations tabs.]

Selecting the Company Assessments tab will bring up a new window.
The new window will present a list of the assessments that have been assigned to and conducted on behalf of that user.

At the bottom of that window is an ADD button and selecting this will open up a drop down to select the competency assessment you wish to assign to that user. Please note the drop down will only contain those assessments that haven't already been assigned to that user.

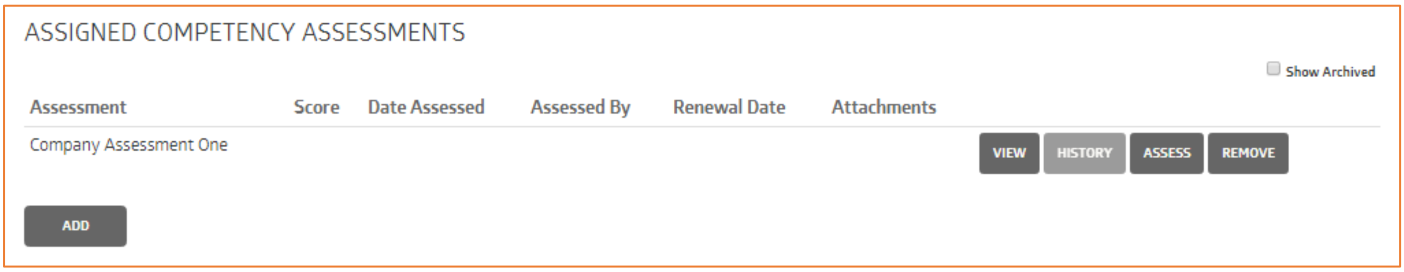

Figure 16 - Viewing Assigned Competency Assessments.

Additionally, each list item will include provide several action buttons:

- **View –** allows approved permission holders to view the assessment record i.e. the scores achieved for each Subject Criteria, any associated attachments, comments or expiry dates.
- **History** – Allows approved permission holders to look at the user's list of the previous assessments records, for the selected assessment. The list of historic assessments will also allow the permission holder to view the Subject Criteria Breakdown and assessment results as described above. At the point an assessment has been carried out and the final score determined. The details of the assessment, including the Subject Criteria, Descriptions and Scoring Schema will be saved as part of the assessment record so that the point in time details can be reviewed as part of this History function.
- **Assess** - Clicking the Assess button will open a new window which will allow the permission holder to carry-out a new assessment on the user. If an assessment has only been partially completed and has a state of "Incomplete" the Assess button will change to a Continue button.

- **Remove** – The Remove button will only be available against assessments that have never been started for that user. This option is in case an assessment has been incorrectly assigned to a user.

Once an assessment has been started or completed, the Remove button will be replaced with an Archive button.

- **Archive –** If the Archive button is selected the records for that assessment will be consigned to history. A Show Archived check box is above the list and when selected will allow the permission holder to view any archived assessment records.

Completing an Assessment

When using the assess button, you will see a screen similar to Figure 17 below.

You can then score the user from 1 to 5 by using the radio button next to the relevant number. Use the grey VIEW SCHEMA button to see the breakdown of what each score represents.

Some subjects may require supporting evidence by means of attachment. Some subjects may require an expiry date for the subject, and some may even require both of the above. However these are controlled when they are built by the CA.

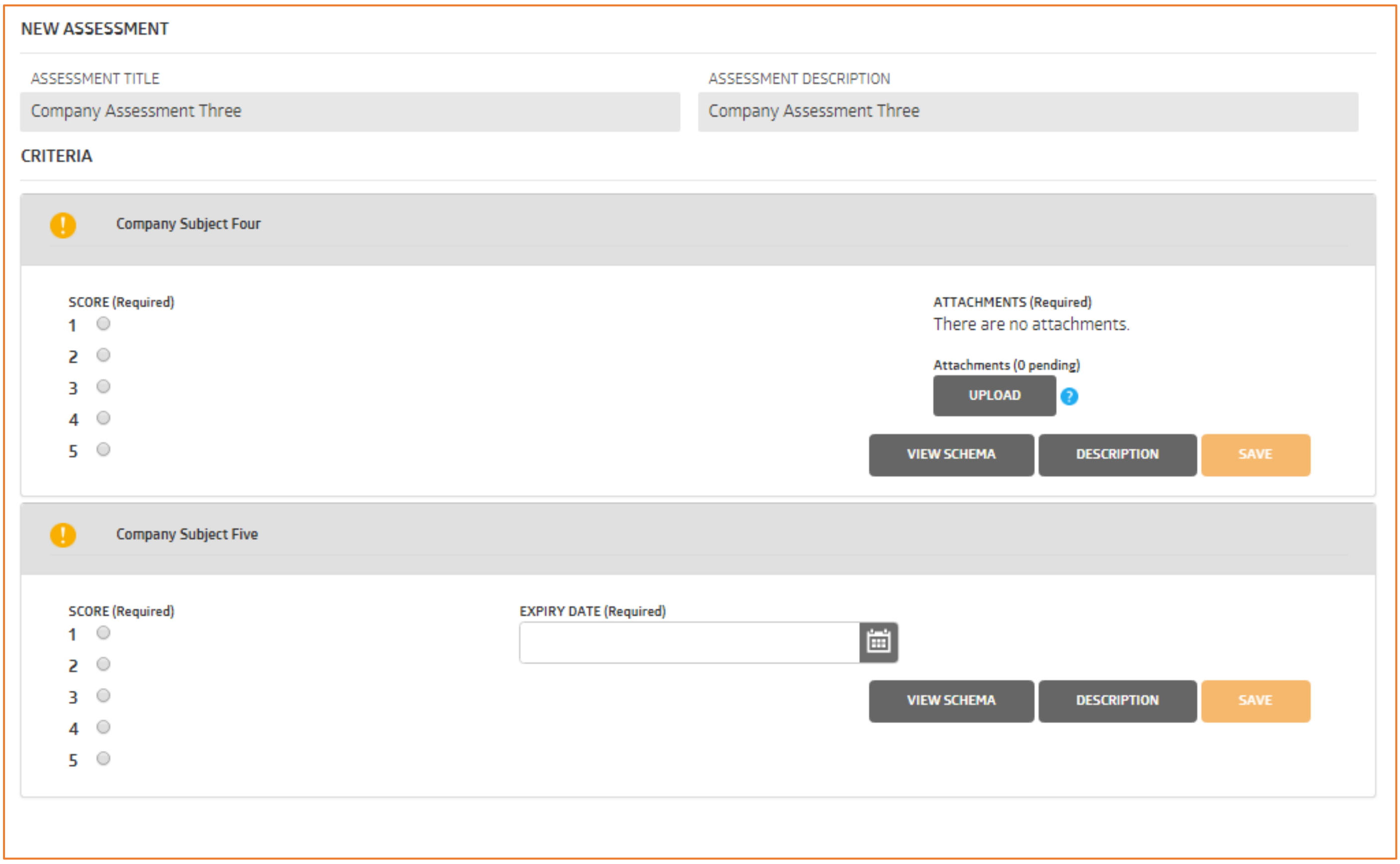

Figure 17. – Starting the Company Assessment

Once you have entered all the mandatory fields for an assessment, the icon will turn green and the next subject can be assessed. Once all subjects are assessed, the assessment is ready for be completed and assigned to the user.

Some assessments, before being finalised, may require supporting evidence by means of attachment. Some may require an expiry date, and some may even require both of the above. However, these are controlled when they are built by the CA.

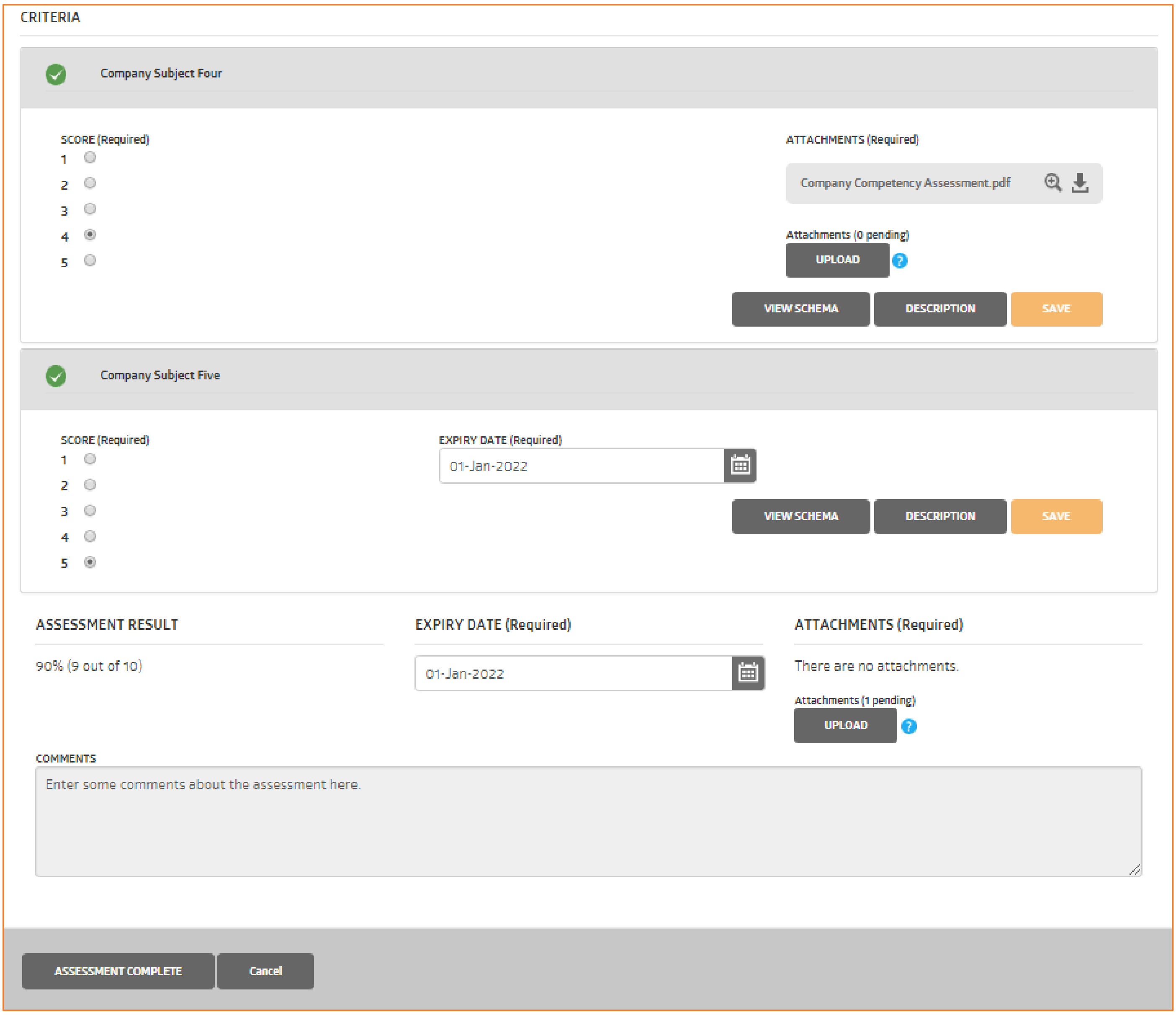

Figure 18 – Completing the Assessment [Adding attachment & Expiry Dates]

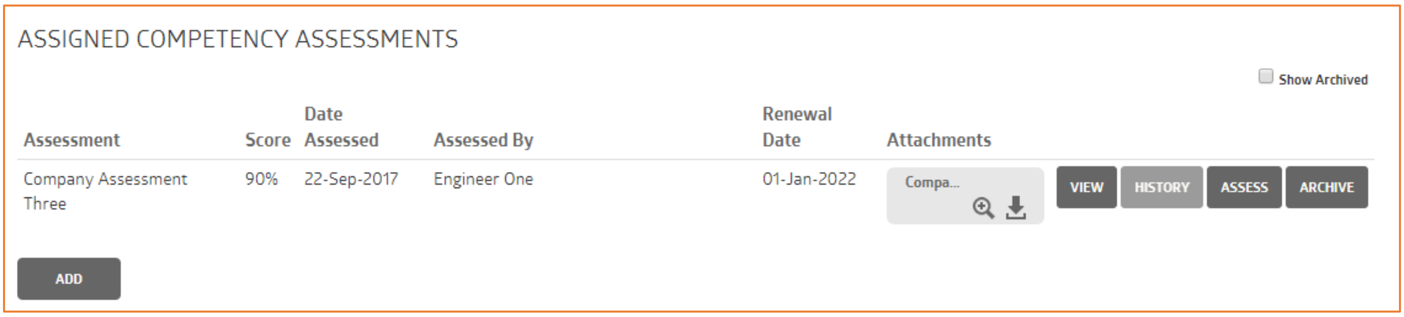

Figure 19 - Assessment Complete – Added to user's profile

Viewing a User's/Engineer's Personal Profile

As a **Manager** and **QA** ***[Note Supervisors can only assess, and not see any competency assessments]***

- Via all available routes, View Profile includes a tab labelled 'Company Assessments'
- This presents a list of any previous active and completed Company Assessments that a user has undertaken within your organisation only. The list will be the same as the list that the engineer sees when he/she views their own profile.

Please note that **Supervisor** permission holders do not have access to or can even see the 'Company Assessments' tab when viewing another user's Profile.

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Notifications

The system will send notifications related to Competence Assessments in per the following scenarios;

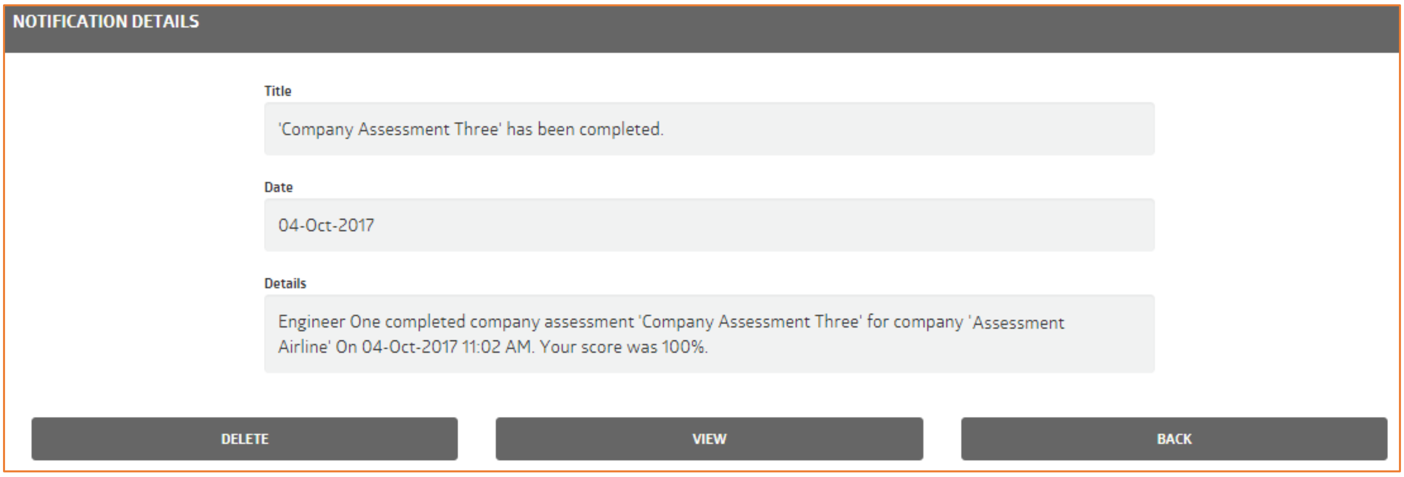

Figure 20 – An example of a notification

- A new Competence Assessment has been assigned to a user:
  - The user to whom the competency has been assigned will receive an email notification and an accompanying dashboard alert.

- Company Competency Assessment approaching expiry:
  - The user to whom the Company Competency Assessment record is attributed will receive a notification of an approaching expiry 1 month, 2 weeks and 24 hours in advance of the expiry date. (Unless the handshake with the issuing organisation is broken)
  - The 'Assessed by' user will receive a notification of User X's upcoming expiry 1 month, 2 weeks and 24 hours in advance of the expiry date.

- All QA users will receive a notification of User X's upcoming expiry 1 month, 2 weeks and 24 hours in advance of the expiry date.
- Company Competency Assessment Pending:
  - When a new assessment is assigned to a user, there is no expiry date. Therefore, if the assessment was forgotten and not carried out, no notification would be sent.
  - Once an assessment has been assigned a notification will be sent to QA's if assessment not carried out with in "X" days.
- Company Competency Assessment record has been completed
  - The user to whom the Company Competency Assessment record is attributed will receive a notification when the Assessment record is saved and the score is published. The notification will include a link to view their own Company Competency Assessment page.

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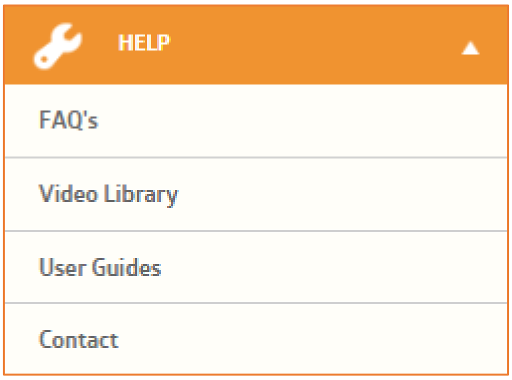
Chapter 4: Help

System Support

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