Training Guide

RECENCY

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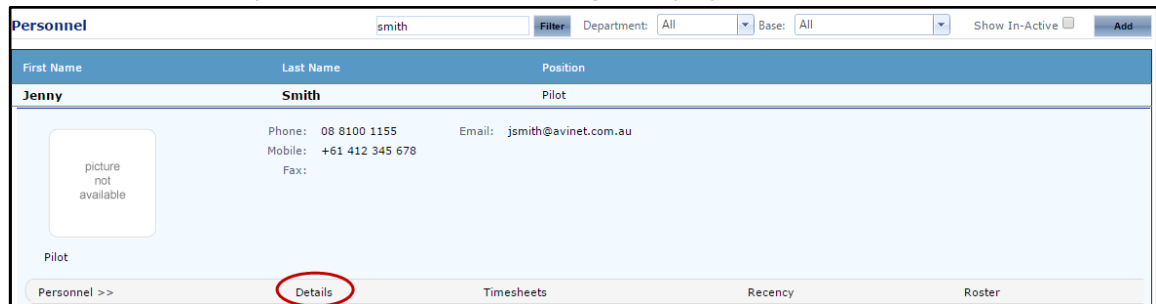# Contents

Assigning Access Levels

Before users can attempt to manage recency and currency, they must be assigned the correct access levels. Follow the steps below to assign the access levels:

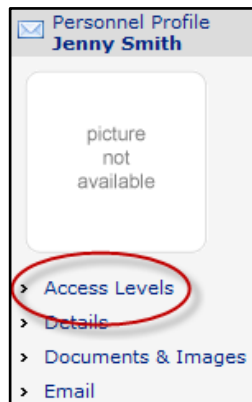Step 1. Select **Operations > People > Personnel**. The **Personnel** screen is displayed.

Step 2. Filter the **Personnel** screen according to your requirements.
- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Details] to view detailed personnel information. If you do not have the required access level to view personnel details, a warning is displayed.

Step 4. Select 'Access Levels' from the **Personnel Profile** pane.

Step 5. Click [Edit].

Step 6. Select all the applicable access levels in the **'Personnel Manage'** and **'Recency Management'** groups.

Access Level	Description
Personnel Management > Personnel Recency > View Self	Allows users to view their own recency details via **My Profile > My Recency**.
Personnel Management > Personnel Recency > View Selection	Allows users to view the recency details for personnel in selected departments and bases.
Personnel Management > Personnel Recency > View All	Allows users to view the recency details for personnel in all departments and bases.
Personnel Management > Personnel Recency > Modify Selection	Allows users to update the recency details for personnel in selected departments and bases.
Personnel Management > Personnel Recency > Modify All	Allows users to update the recency details for personnel in all departments and bases.
Recency Management > Recency > Modify Selection	Allows users to setup, edit and disable recency items for selected departments.
Recency Management > Recency > Modify All	Allows users to setup, edit and disable recency items for all departments.
Recency Management > Company Recency > View All	Allows users to view company recency items.
Recency Management > Company Recency > Modify All	Allows users to create, edit, disable and update company recency items.
Aircraft Register > Aircraft > Modify All	Allows users to update aircraft recency dates.

Step 7. Click [OK].
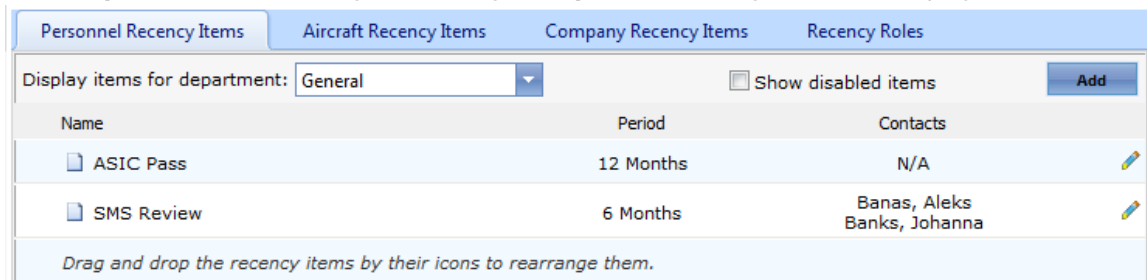
Setting Up Recency Items

Air Maestro's Recency module helps your organisation to comply with regulatory and organisational requirements. It is a useful reminder service used to notify personnel and the nominated recency managers of upcoming licence renewals, line and base checks, aircraft registrations, approvals, AOCs, renewal of medical certificates and other activities which are required to keep personnel and the company current.

It is also a helpful training and planning tool. Administrators can record and keep track of training activities for different departments and personnel. For example, induction programs, dangerous goods training and emergency response training.

Each recency item is either updated by the recency manager or by the individual, if the recency item is self-updatable. Self-updatable items are indicated to the user by a pencil icon next to the item name (for editing) and the presence of the [Add Recency] button.

View Recency Items

Step 1.   Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

By default the system displays personnel recency items. If you wish to view aircraft or company recency instead, select the required tab.

Step 2.   Select the required department from the **Display Items For Department** drop-down list (if viewing personnel recency).

Step 3.   Click **Edit** [✏] for the required recency item. The **Edit Item** dialog box is displayed.

Step 4.   Review the recency item setup.

Step 5.   Click [OK].

Create Recency Items

Step 1. Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

💡 *By default the system displays personnel recency items. If you wish to create aircraft or company recency instead, select the required tab.*

Step 2. Click [Add]. The **Edit Item** dialog box is displayed.

Step 3. Select the **Item** radio button (this is selected by default).

💡 *To create a header to group similar recency item together, select the **Heading** option and enter a title for the header in the **Name** text box. Click [OK].*

Step 4. Enter a descriptive title for the recency item in the **Name** text box.

Step 5. Select the department the recency item applies to from the **Department** drop-down list (if creating a personnel recency item).

💡 *Select 'General' if the recency item applies to everyone in the organisation.*

Step 6.   Select the **On Type Recency** tick box, if you wish to track which aircraft type the recency item is conducted on.

Step 7.   Select the **Type Specific** tick box, if this item relates to an aircraft and must be completed for each endorsement type. If you select this tick box, you must also ensure that the **On Type Recency** tick box is selected.

Step 8.   Enter the number of times the recency item must be completed in the specified period in the **Target Count** text box.

Step 9.   Enter the validity period for the recency item in the **Period** text box and select the **Days** or **Months** radio button. If the recency item only requires a last conducted date, enter 0. An example of a recency item which only requires a last conducted date is a company induction.

Period: 12   ◯ Days ◉ Months

Step 10. Enter the warning period in the **Caution** text box.

Step 11. Enter the time the user has to renew the recency item before the expiry date lapses in the **Renewal Window** text box and select the **Days** or **Months** radio button. If the recency item is conducted within this renewal window, the new expiry date is based on the old expiry date. For example, if a yearly recency item with an original expiry date of 16/01/2012 and renewal window of 30 days is conducted on the 2/01/2012, the next expiry date is 16/01/2013.

Step 12. Enter the revalidation period in the **Re-validation required after** text box, if the recency item requires revalidation. For example, a Pilot's Medical Certificate may require revalidation at specified intervals.

Step 13. Select the applicable options for the recency item.

Field	Description
Drop Dead	Select the **Drop Dead** tick box if users must be locked out of the system when the recency item expires. When a recency item with a drop dead attribute expires, the system only allows the user to login and view the **Alerts** screen. Use the drop dead attribute for recency items where the user must not fly if the item is expired. Only users with the **Recency Management > Modify All** access level permission can unlock the system for users which have been locked out of the system due to a drop dead recency item.
Self-Updatable	Select the **Self-Updatable** tick box if users can update the recency item themselves. For example, an ILS approach.
End of Month	Select the **End of Month** tick box if the recency item must expire on the last day of the month.
End of Year	Select the **End of Year** tick box if the recency item must expire at the end of the year.
Manual Expiry Date	Select the **Manual Expiry Date** tick box if the recency item expiry date can be overwritten.
Update Parent Item	Select the **Update Parent Item** tick box if this item belongs to a hierarchy and updates its parent item in the hierarchy.
Allow Future Dates	Select the **Allow Future Dates** tick box if you can future enter last conducted dates for this item.

Step 14. Select the default status for this item from the **Default Status** drop-down list.

> *Select 'Required' if the item generally applies to all personnel in the department. Alternatively, select 'Hidden' if the item is unique to a few personnel in the department.*

Step 15. Select the contacts responsible for the recency item from the **Contacts** drop-down list.

> *The selected contacts receive alerts when this recency item expires or is approaching expiry. Each time personnel complete this item, one of the contacts must update the person's **Recency** screen with the last conducted date (unless this is a self-updatable item).*

Step 16. Click [OK].

Create Timesheet Recency Items

Step 1. Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

Step 2. Click [Add]. The **Edit Item** dialog box is displayed.

Step 3. Select the department the recency item applies to from the **Department** drop-down list.

> *You can only create Timesheet Recency items for the Pilot and Crew departments.*

Step 4. Select the **Timesheet Item** radio button.

> *To create a header to group similar recency item together, select the **Heading** option and enter a title for the header in the **Name** text box. Click [OK].*

Step 5. Enter a descriptive title for the recency item in the **Name** text box.

Step 6. Select the **Type Specific** tick box, if this item must be completed on each endorsement type. For timesheet recency items the **On Type Recency** tick box is automatically selected.

Step 7. Enter the number of times the recency item must be completed in the specified period in the **Target Count** text box.

Step 8. Enter the validity period for the recency item in the **Period** text box and select the **Days** or **Months** radio button. If the recency item only requires a last conducted date, enter 0. An example of a recency item which only requires a last conducted date is a company induction.

Step 9. Enter the warning period in the **Caution** text box.

Step 10. Select the timesheet field the recency item must be linked to in the **Link to field** drop-down list. In the example below, each time a night landing is conducted by the user, it will automatically update the 3 landings in 90 days timesheet recency item created.

Step 11. Select any additional items that are updated when this recency item is conducted from the **Update Item** drop-down list.

Step 12. Select the default status for this item from the **Default Status** drop-down list.

> *Select 'Required' if the item generally applies to all personnel in the department. Alternatively, select 'Hidden' if the item is unique to a few personnel in the department.*

Step 13. Select the contacts responsible for the recency item from the **Contacts** drop-down list.

> *The selected contacts receive alerts when this recency item expires or is approaching expiry. Each time personnel complete this item and record it in their timesheet the person's **Recency** screen is automatically updated.*

Step 14. Click [OK].

Create Composite Recency Items

Step 1. Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

Step 2. Click [Add]. The **Edit Item** dialog box is displayed.

Step 3. Select the **Composite Item** radio button.

> 💡 *To create a header to group similar recency item together, select the* **Heading** *option and enter a title for the header in the* **Name** *text box. Click [OK].*

Step 4. Enter a descriptive title for the recency item in the **Name** text box.

Step 5. Select the department the recency item applies to from the **Department** drop-down list.

Step 6. Select the **Type Specific** tick box, if this item relates to an aircraft and must be completed on each endorsement type.

Step 7. Enter the number of child recency items that must be completed in the specified period in the **Target Count** text box.

Step 8. Enter the warning period in the **Caution** text box.

Step 9. Select the default status for this item from the **Default Status** drop-down list.

Select 'Required' if the item generally applies to all personnel in the department. Alternatively, select 'Hidden' if the item is unique to a few personnel in the department.

Step 10. Select the contacts responsible for the recency item from the **Contacts** drop-down list.

Step 11. Select the items which can update this recency requirement in the **Child Items** pane, clicking [Add] after each insertion.

Step 12. Click [OK].

Modify Recency Items

Step 1. Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

By default the system displays personnel recency items. If you wish to modify aircraft or company recency instead, select the required tab.

Step 2. Click **Edit** [🖊] for the required recency item. The **Edit Item** dialog box is displayed.

Step 3. Edit the required fields.

Step 4. Click [OK]. The recency item is updated on the **Recency** screen.

Disable Recency Items

Step 1. Select **Operations > Recency > Recency Setup**. The **Recency** screen is displayed.

By default the system displays personnel recency items. If you wish to disable aircraft or company recency instead, select the required tab.

Step 2. Click **Edit** [🖊] for the required recency item. The **Edit Item** dialog box is displayed.

Step 3. Select the **Disabled** tick box.

Step 4. Click [OK]. The recency item is displayed in italic, grey text to indicate it is disabled.

Managing Recency Items

Updating Aircraft Recency

For the aircraft to remain current, the recency contact for each recency item must record the dates the recency requirement was last conducted. Contacts are reminded of outstanding and approaching recency requirements in the **Alerts** screen.

Step 1.   Select **Operations > Aircraft**. The **Aircraft** screen is displayed.

Step 2.   Click the magnifying glass [🔍] corresponding with the aircraft to update.

Step 3.   Click **Recency** in the **Aircraft Profile** pane.

Step 4.   Click the magnifying glass corresponding with the recency item to update. The **Update Recency Item** dialog box is displayed.

Step 5.   Click [Add Recency]. The **Last Conducted**, **Expires**, **Comments** and **File** fields are displayed.

Step 6.   Enter the date the recency item was last conducted in the **Last Conducted** text box.

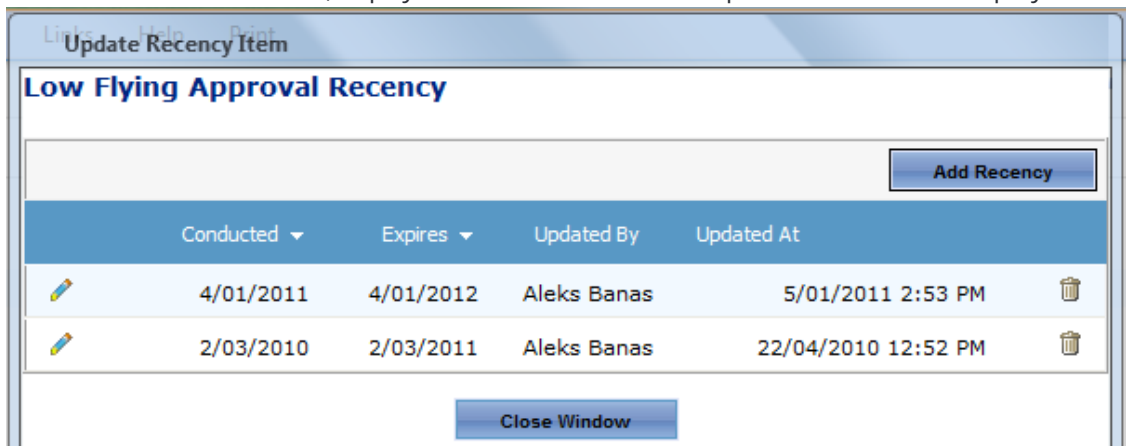Step 7.   Click the **Recalculate Expiry Date** icon to view the new expiry date.

> 💡 *The new expiry date is calculated based on the rules setup in the **Recency Setup** area.*

Step 8.   Enter any remarks relating to this recency item in the **Comments** text box.

Step 9.   Click [Select] in the **File** pane and browse for the file related to this recency item.

Step 10. Click [Open]. The file name is populated in the **File** text box.

Step 11. Click [OK]. The recency item is updated with the last conducted date.

Step 12. Click [Close Window] to return to the **Aircraft Recency** screen. You are prompted to refresh the screen.

Step 13. Click [OK] to update the screen with the new expiry date.
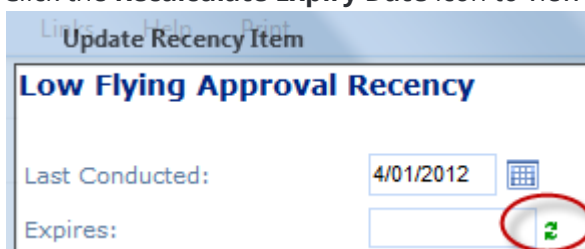
Updating Company Recency

For the company to remain current, the recency contact for each recency item must record the dates the company recency requirement was last conducted. Contacts are reminded of outstanding and approaching company recency requirements in the **Alerts** screen.

Step 1. Select **Operations > Recency > Company Recency**. The **Company Recency** screen is displayed.

Step 2. Click the magnifying glass corresponding with the recency item to update. The **Update Recency Item** dialog box is displayed. If the item has previously been conducted, a record of the last conducted date, expiry date and the user who updated the item is displayed.

Step 3. Click [Add Recency]. The **Last Conducted**, **Expires**, **Comments** and **File** fields are displayed.

Step 4. Enter the date the recency item was last conducted in the **Last Conducted** text box.

Step 5. Click the **Recalculate Expiry Date** icon to view the new expiry date.

*The new expiry date is calculated based on the rules setup in the **Recency Setup** area.*

Step 6. Enter any remarks relating to this recency item in the **Comments** text box.

Step 7. Click [Select] in the **File** pane and browse for the file related to this recency item.

Step 8. Click [Open]. The file name is populated in the **File** text box.

Step 9. Click [OK]. The recency item is updated with the last conducted date.

Step 10. Click [Close Window] to return to the **Company Recency** screen. You are prompted to refresh the screen.

Step 11. Click [OK] to update the screen with the new expiry date.

Updating Personnel Recency

For personnel to remain current, the recency contact for each recency item must record the date the person last conducted the recency requirement (with the exception of self-updatable items). Personnel are reminded of their outstanding recency requirements in the **Alerts** screen. Personnel can only update recency items which are self-updatable. Self-updatable recency items (for example, an ILS) are determined in the recency setup. All other recency items must be updated by the recency contact.

Step 1. Select **Operations > People > Personnel.** The **Personnel** screen is displayed.

*Alternatively, if the user is visible in the **Timesheet Summary** on the **Home** screen, click the recency traffic light icon corresponding with their name. The **Recency** screen is displayed. Proceed to Step 4.*

Step 2. Filter the **Personnel** screen according to your requirements.
- Enter filter criteria in the text-box and click [Filter].
- Select a value from the **Department** drop-down list to view personnel located in a particular department.
- Select a value from the **Base** drop-down list to view personnel located in a particular base location.
- Select the **Show In-Active** tick box to include personnel that are no longer active in the system. This includes personnel which have ceased employment with your organisation.

Step 3. Click [Recency] to view detailed recency information for the individual. The **Recency** screen is displayed.

Recency Item	Last Conducted	Expires	Status	Required	Optional
Department: General					
ASIC Pass	12/06/2010	12/06/2012	OK	✓	
SMS Review	1/03/2011	1/09/2011	OK	✓	
Department: Pilot					
EP 20:11	16/02/2011	16/02/2012	OK	✓	
Dangerous Goods	19/05/2011	19/05/2012	OK	✓	
Line Check	1/06/2011	30/06/2012	OK	✓	
PPC	3/01/2011	31/01/2012	OK	✓	
CRM	6/10/2010	6/01/2012	OK	✓	

☑ Hide optional items   Alter Status

Field	Description
Last Conducted	The date the selected individual last performed the recency item.
Expires	The date by which the selected individual is required to perform the recency item.
Status	The selected individual's compliance status with the recency item.
Required	A tick icon in the **Required** column, indicates an item which the selected individual must perform, to remain complaint.
Optional	A tick icon in the **Optional** column, indicates an item which the selected individual can perform, but is not required for their compliance.

Step 4. Click the magnifying glass corresponding with the recency item to update. The **Update Recency Item** dialog box is displayed. If the item has previously been conducted, a record of the last conducted date, expiry date and the user who updated the item is displayed.

Step 5. Click [Add Recency]. The **Last Conducted**, **Expires**, **Comments** and **File** fields are displayed.

Step 6. Enter the date the recency item was last conducted in the **Last Conducted** text box.

Step 7. Click the **Recalculate Expiry Date** icon to view the new expiry date.

The new expiry date is calculated based on the rules setup in the **Recency Setup** area.

Step 8. Enter any remarks relating to this recency item in the **Comments** text box.

Step 9. Click [Select] in the **Image** pane and browse for the file related to this recency item.

Step 10. Click [Open]. The file name is populated in the **File** text box.

Step 11. Click [OK]. The recency item is updated with the last conducted date.

Step 12. Click [Close Window] to return to the **Recency** screen. You are prompted to refresh the screen.

Step 13. Click [OK] to update the screen with the new expiry date.