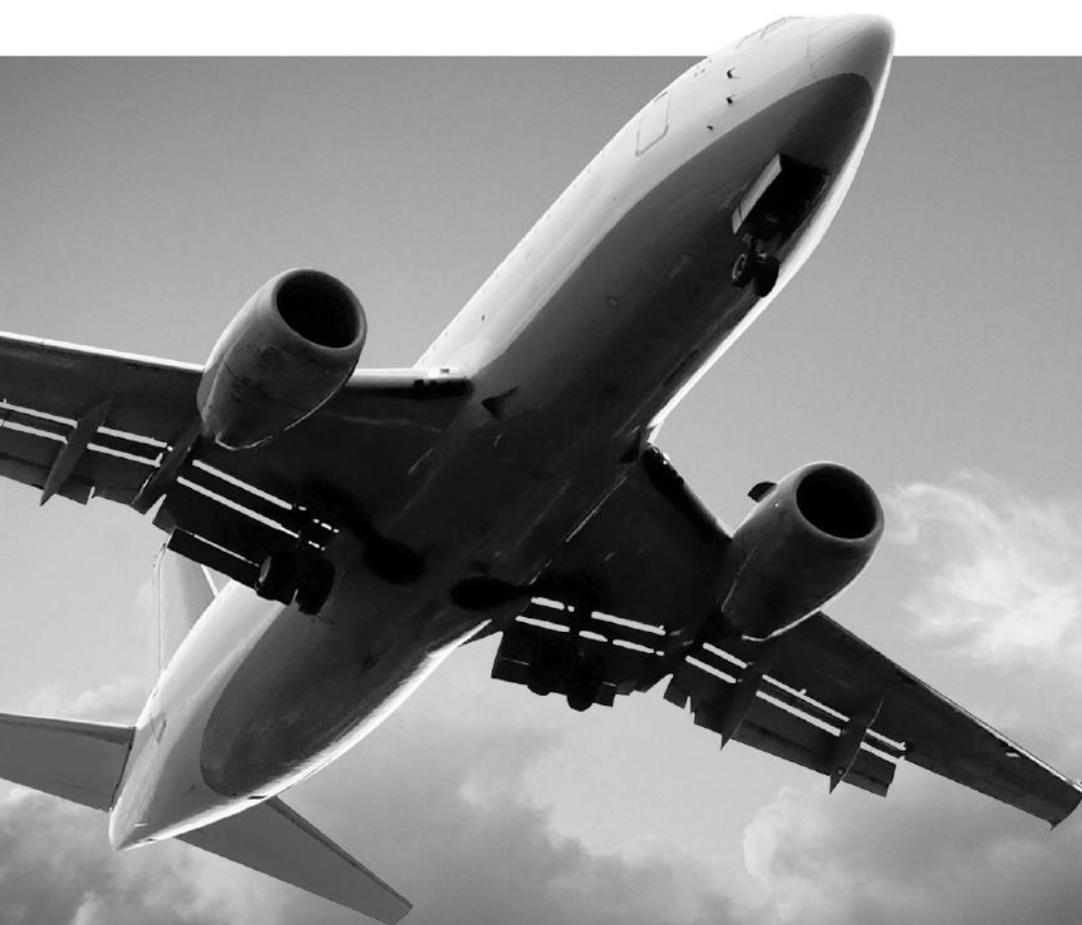


CrewAssessment Web Portal User Manual

version 1.1.8

March 2016



 **merlot.aero**

smart airline solutions | future-ready technology

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William Fan	June 6, 2014	1.0	Final
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DISCLAIMER:

This user guide is for training purposes only. The information contained in this user guide is current at the time of publication. It can be used to reference and may be subject to change.

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What are merlot's applications?

The merlot.aero suite is a complete organizational management solution offering all aspects of airline resource planning and control to ensure the safety, efficiency and quality of your crew and operational environment.

merlot.aero is a comprehensive suite of applications covering all aspects of your airline needs. It has been developed with the entire business process in mind, including the customer process from the moment ticket sales are planned until the point the passenger reaches their destination.

For your convenience, merlot applications are divided into two main categories:

- Aircraft Applications
- Crew Applications

There are a number of applications under these two main categories.

Aircraft applications include:

- AircraftSchedule
- AircraftFollow
- AircraftPortal
- AircraftMobile

Crew applications include:

- CrewPlan
- CrewBuild
- CrewRoster
- CrewPortal
- CrewMonitor
- CrewFollow
- CrewPayroll
- CrewMobile

About CrewAssessment

CrewAssessment allows airline check and training staff to electronically capture assessment information of crew on an electronic tablet device in real time for assessment and distribution. Data is instantly routed to various departments within the airline to perform work flow actions.

CrewAssessment will automatically update the airline's staff training records as passed or failed so that the expiry in question can be updated. This allows reliable management of crew compliance enabling airlines to fulfil regulatory requirements with ease while operating as efficiently as possible.

CrewAssessment is for use with the merlot.aero suite of products. merlot.aero is a cloud-based airline operations management system designed specifically for the airline industry. Airlines use merlot.aero to optimize day-to-day crew and aircraft utilization, as well as control and report on core operational information. This enables them to manage their business, achieve regulatory compliance, maximize operational efficiency and focus on scalable growth.

CrewAssessment Web Portal Audience

CrewAssessment users are training and assessment administrators and managers who need to ensure that assessment results are continually updated in the system.

CrewAssessment Prerequisites

The prerequisite to use the CrewAssessment application is the current use of the merlot.aero suite of applications.

CrewAssessment is available as a free download from the following App stores:



Airline Specific Requirements

Your airline may have additional requirements for using CrewAssessment. For example, some airlines may require users to download CrewAssessment from their mobile device management (MDM) tool or internal enterprise App Store. Some airlines may also require mobile users to connect to their corporate Virtual Private Network (VPN) first to access crew information.

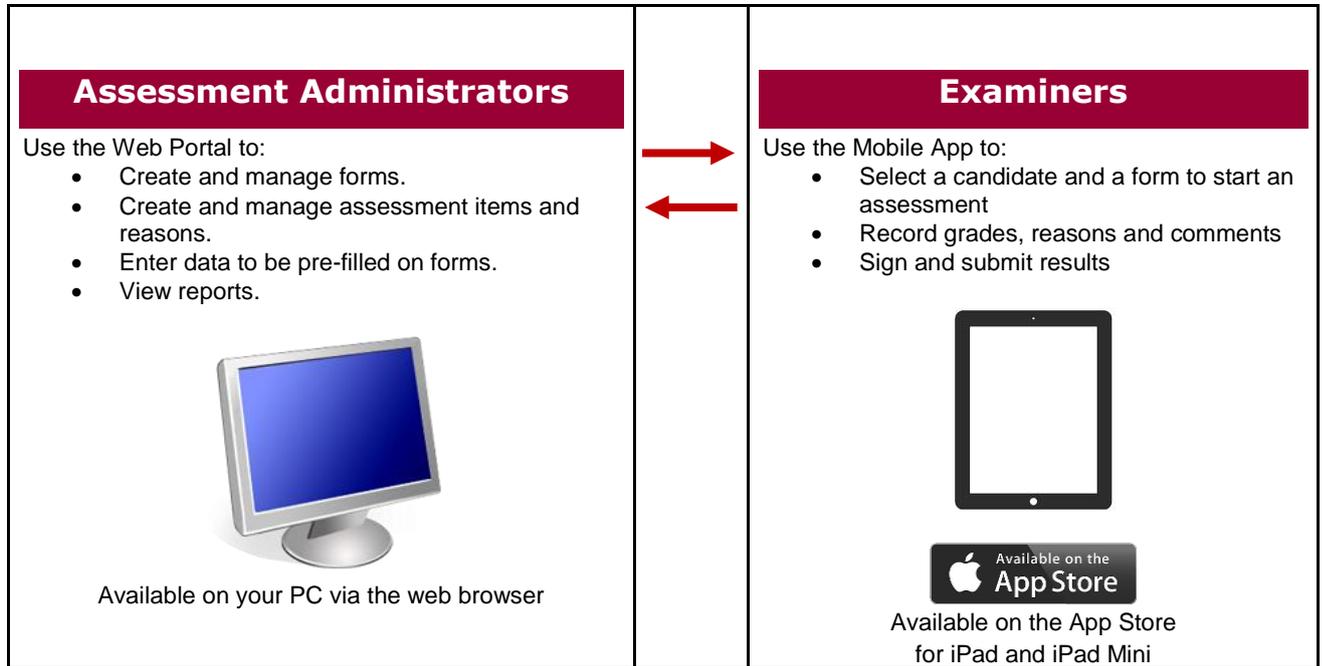
Please follow the instructions given by your administrator if they differ from this guide.

Supported Phone and Tablet Devices

CrewAssessment is available for Apple iPad running iOS 6 and higher.

As part of continuous improvement, we add and deprecate platform versions from time to time. This ensures our apps are available on a wide range of popular devices currently on the market.

The Crew Assessment System



Anatomy of a Form

When you create forms, keep in mind the structure of a CrewAssessment form to ensure it is displayed correctly on the examiners' iPads.

Keyword	Description
Check Form	This is the entire form.
Check Section	This is a section within a form. Each form can have up to 2 sections.
Check Header	This is an assessment item.
Check Content	Links a Check Item to a Check Header.
Check Item	This is used to give further guidance to the examiner for an assessment item. An info icon appears next to the assessment item if there are linked Check Items. The Check Item text appears when the examiner taps on the info icon.
Check Grade	This allows the examiner to select either a grade between 1 and 5 or N/A. Important: Grades are pre-configured in CrewAssessment and should not be changed.
Check Reason	This is the list of performance markers. The examiner may select one or more performance markers for an assessment item.

Any changes to Check Grades and Check Reasons apply to all forms, whereas changes to Check Sections, Check Headers and Check Items apply to a specific form only.

Check Form

Carrier
3:18 PM
100%

CrewAssessment
Sim 10A Capt

Flight Crew Name LAMPEN-SMITH, DAVID		Company Number 126793	Rank Captain
Date 28 Jun 2013	Variant B738	Sim No. 10A	Recurrent <input type="checkbox"/>
An/Line F/Up Other		Sectors AKL / CHC / AKL /	
Technical Conditions SIG MOD LOW		Weather Conditions SIG MOD LOW	

Check Reason

1. Tech	
MAN	
AM	
SOP	<input checked="" type="checkbox"/>
NNP	
KNO	
2. Non-Tech	
SA	<input checked="" type="checkbox"/>
DM	
TW	

Check Section 1

ASSESSMENT ITEMS	(R)	GRADING	NA	PERF MARKERS
1. Preflight	<input type="checkbox"/>	3	<input type="checkbox"/>	
2. Taxi	<input type="checkbox"/>	4	<input type="checkbox"/>	
3. Takeoff	<input type="checkbox"/>	5	<input type="checkbox"/>	Required
4. Climb	<input type="checkbox"/>	2	<input type="checkbox"/>	Required
5. Cruise	<input type="checkbox"/>	1	<input type="checkbox"/>	Required
6. Descent	<input type="checkbox"/>	2	<input type="checkbox"/>	SOP,SA
7. Holding	<input type="checkbox"/>	4	<input type="checkbox"/>	
8. Visual Approach	<input type="checkbox"/>	NA	<input type="checkbox"/>	

Check Section 2

ADDITIONAL ITEMS	(R)	GRADING	TRG	PERF MARKERS
A Uncommanded Rudder	<input type="checkbox"/>	0	<input type="checkbox"/>	
B DME Arc	<input type="checkbox"/>	0	<input type="checkbox"/>	
C Cold Weather Operations	<input type="checkbox"/>	0	<input type="checkbox"/>	
D Significant In-flight SAT Change	<input type="checkbox"/>	0	<input type="checkbox"/>	
E	<input type="checkbox"/>	0	<input type="checkbox"/>	
F	<input type="checkbox"/>	0	<input type="checkbox"/>	
G	<input type="checkbox"/>	0	<input type="checkbox"/>	

Comments

Satisfactory

Unsatisfactory (Contact Crewing Immediately)

Valid Medical Certificate

Log Book Sticker Issued

Flight Examiner Name Maryanne Lewis	Flight Crew Email Address lampensmith@xtra.co.nz
Flight Examiner Signature	Flight Crew Signature

Save

SignOff and Submit

Check Item

5. Cruise	MBS 2
6. Descent	
7. Holding	

Check Headers for section 1

Check Headers for section 1

Check Headers for section 2

Check Headers for section 2

Web Portal – Step by Step

Logging into Configure

On your computer, open a web browser and go to this URL:

<https://{IATACODE}.merlot.aero>
(replace {IATACODE} with the actual IATA code for your airline)

Microsoft Silverlight is required. It is a small web browser plug-in and you will be prompted to install this software if it is not already installed on your PC.

Use this user login to access the web portal. Depending on your system configuration, you may either have individual logins or a single admin login shared amongst all managers and administration staff. Note that this user login is different from “employee” logins. Employee logins are used by examiners to log into the mobile app to fill out and submit forms.

After logging in successfully, select the **Configure** application.

In the **Mobile** menu, you’ll find all the commands to create and manage forms and assessment items.

Creating a Form

To create a complete form, you must complete these steps in the following order:

1. Add a Check Form
2. Add up to 2 Check Sections to the Check Form
3. Add Check Headers under each Check Section
4. (optional) Add Check Item

Check Reason and Check Grade are not modified when you create new forms because they would apply to all forms.

Add a Check Form

Form*	Description*	Variant	Check Number	Comment Description	Work Flow	Active
CREW	Flight Crew Assessment Form	xxx	000	Test Comment William	<input type="checkbox"/>	<input type="checkbox"/>
Crew	Flight Crew Assess 2 111	xxx	987	William Test	<input type="checkbox"/>	<input type="checkbox"/>
Crew	Flight Crew Assess Test 3	xxx	Sim 1	First Trial	<input type="checkbox"/>	<input type="checkbox"/>
Crew	Sim Y3B Captain	B738	Y3B		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	Sim Y3B First Officer	B738	Y3B		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	Sim Y3A Captain	B738	Y3A		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	Sim Y3A First Officer	B738	Y3A		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	Pilot Annual Line Check	B738			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Crew	Cabin Crew Annual Line Check	B738		First Trial	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Crew	F/E Biennial Assessment	B738	JC104 V2		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Go to **Mobile > Training Evaluation > Evaluation Form**. A list of existing forms will appear. Click the **Add** button to create a new form and enter the required fields. To edit an existing form, double-click on the field that you want to edit. Click the **Save** button when you have finished making changes on this screen.

Make sure you tick the **Active** checkbox because only active forms will be available to the examiner in the app. Untick the **Active** checkbox when the assessment is no longer open.

Add Check Sections

Check Form: Sim Y3B Captain

Section*	Description
Assessment Item	Assesment Item
Additional Items	Additional Items

Once you have created a Check Form, go to **Mobile > Training Evaluation > Evaluation Section**. In the Check Form drop-down list, select the form that you've just created.

A list of existing sections for this form will appear. Click the **Add** button to create a section, then enter a Section and Description. To edit an existing section, just double-click on the field that you want to edit. Click the **Save** button when you have finished making changes on this screen.

Note: In this release of CrewAssessment, you may create **up to 2 sections only**. The first section will show as “Assessment Items” and the second section will show as “Additional Items” in the app.

Add Check Headers

The screenshot shows the 'Check Header' configuration interface. At the top, there are navigation tabs: Rules, Mobile, System, and Reports. Below these are utility icons and a 'Login Centre' link. The main area is titled 'Check Header' and contains two dropdown menus: 'Check Form' (set to 'Sim Y3B Captain') and 'Check Section' (set to 'Additional Items'). Below the dropdowns is a table with the following columns: Heading*, Description*, Mandatory, Show TextBox, Allow Repeat, Allow NA, and Repeat. The table contains eight rows of assessment items, labeled A through H. Each row has checkboxes for the 'Mandatory', 'Show TextBox', 'Allow Repeat', 'Allow NA', and 'Repeat' columns. At the bottom right of the table area, there are four buttons: 'Add', 'Delete', 'Save', and 'Cancel'.

Heading*	Description*	Mandatory	Show TextBox	Allow Repeat	Allow NA	Repeat
A. PRM Breakout	A. PRM Breakout	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B. Visual Circuit	B. Visual Circuit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
C. RHS Assessment	C. RHS Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
D.	D.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
E.	E.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
F.	F.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
G.	G.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
H.	H.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Once you have created your form and added some sections, go to **Other > Check > Check Header** to add assessment items. In the drop-down lists, select the Check Form and then the Check Section.

A list of existing assessment items will appear. Click the **Add** button to create an assessment item, then enter the required fields. To edit an existing assessment item, just double-click on the field that you want to edit. Click the **Save** button when you have finished making changes on this screen. Repeat this process to create assessment items for all sections.

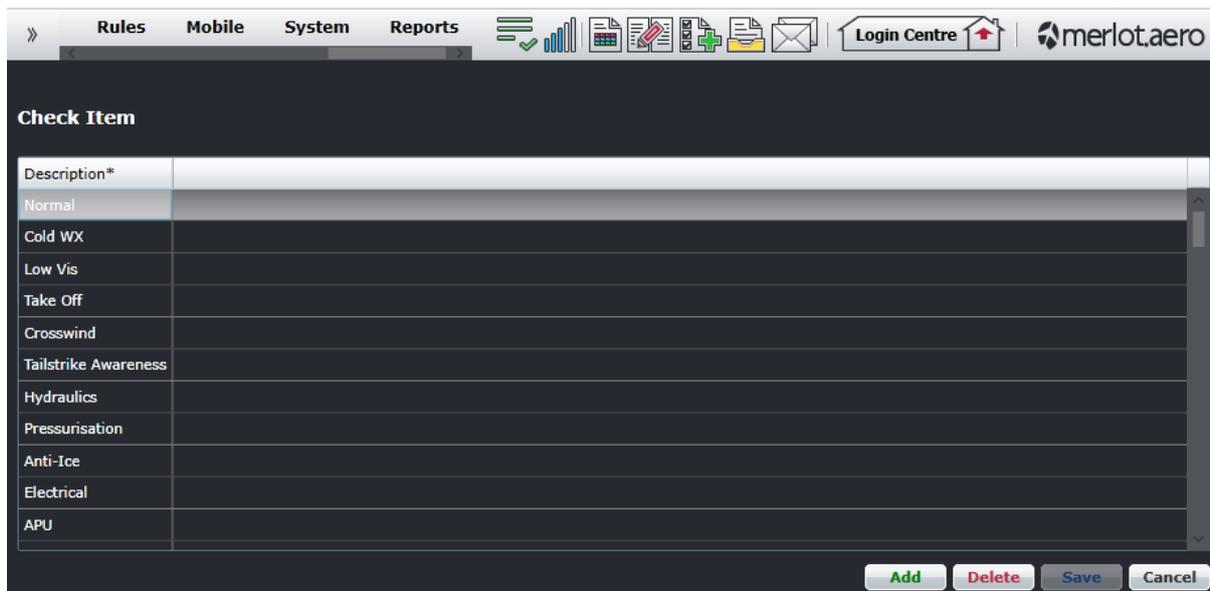
Field	Notes
Heading, Description	Required. We recommend you enter a prefix (e.g. “1.”, “2.”, “3.”, or “A”, “B”, “C”) to ensure your assessment items are displayed in the correct order on the examiners’ devices.
Mandatory, Allow NA	If the Allow NA checkbox is ticked, the examiner will be able to enter either a grade or N/A. If the Mandatory checkbox is ticked, the examiner must enter a grade and they would not be able to select N/A. Do not tick both checkboxes.
Allow Repeat	If ticked, the examiner will be able to select the repeat option. If the examiner has selected the repeat option, grades are restricted to 1 or 2.
Repeat	This sets the pre-filled value of the repeat option for the examiner.
Show Text Box	When this option is ticked, the examiner will be able to edit the heading for this assessment item. This is particularly useful in the additional items section to create free-text assessment items.



Adding Check Items

Check items are used if you want to include additional information about an assessment item. They appear as an info icon displayed next to an assessment item. When the examiner taps on the icon, it displays check items in a pop-up.

Note: Check items are optional. They are not required for every assessment item.



Go to **Mobile > Training Evaluation > Training Evaluation Item**, add your check item if it does not already exist on this list.

Then, go to **Mobile > Training Evaluation > Evaluation Content** to link your Check Item to a Check Header. In the drop-down lists, select the Check Form, Check Section and Check Header, then click the **Add** button and select the Check Item that you want to link to your Check Header. You may link as many Check Items as you need. Click the **Save** button when you're done.

» Rules Mobile System Reports  Login Centre  merlot.aero

Check Content Check Item

Check Form **Sim Y3B Captain** Check Section **Assesment Item** Check Header **10. Non- ILS Approach RNAV (RNP) 35Approach**

Check Item*
MBS 6

Add **Delete** **Save** **Cancel**

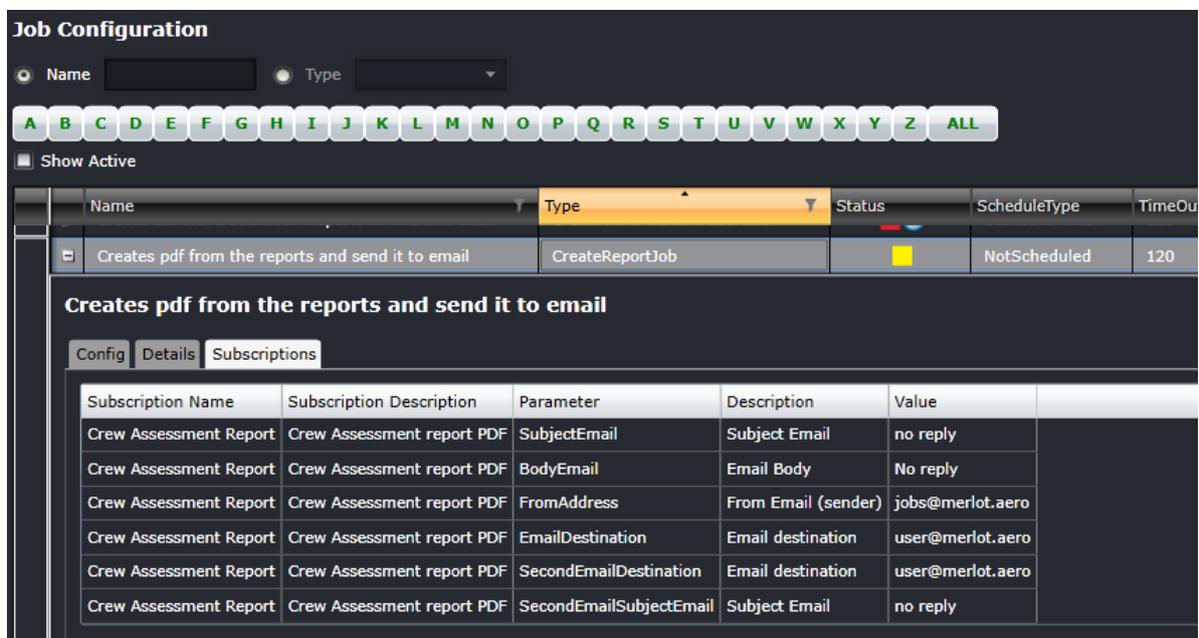
Reporting and Post-Assessment Workflow

Once the examiner has submitted the assessment from their tablet, the results are saved in the Merlot database. You could search and view these results and summary report from the Merlot web portal or configure the system to email the results.

Configuring Email Notifications

The system supports 2 types of email notifications. One is a PDF document that replicates the data submitted for this assessment, the other is a text-based summary email that says whether the result was satisfactory or unsatisfactory.

In **Configure > System > Job Configuration**, find and expand the **CreateReportJob**. This job allows you to enable/disable notifications and to enter email addresses to send notifications to.



The screenshot shows the 'Job Configuration' interface. At the top, there are search filters for 'Name' and 'Type', and a navigation bar with letters A-Z and 'ALL'. Below this is a table of jobs. The 'CreateReportJob' is selected, and its details are shown below. The details are organized into tabs: 'Config', 'Details', and 'Subscriptions'. The 'Subscriptions' tab is active, showing a table of subscription parameters.

Subscription Name	Subscription Description	Parameter	Description	Value
Crew Assessment Report	Crew Assessment report PDF	SubjectEmail	Subject Email	no reply
Crew Assessment Report	Crew Assessment report PDF	BodyEmail	Email Body	No reply
Crew Assessment Report	Crew Assessment report PDF	FromAddress	From Email (sender)	jobs@merlot.aero
Crew Assessment Report	Crew Assessment report PDF	EmailDestination	Email destination	user@merlot.aero
Crew Assessment Report	Crew Assessment report PDF	SecondEmailDestination	Email destination	user@merlot.aero
Crew Assessment Report	Crew Assessment report PDF	SecondEmailSubjectEmail	Subject Email	no reply

User configurable parameters for this job are in the Config and Subscription tabs as detailed below:

Tab	Parameter	Notes
Config	SendEmailToCrew	Set this to True to email a copy of the PDF report to the candidate.
Subscriptions	EmailDestination	Email address(es) to receive PDF report (in addition to the crew member if SendEmailToCrew is True). Use comma to separate multiple addresses.
Subscriptions	SecondEmailDestination	Email address(es) to receive summary notification. Use comma to separate multiple addresses.
Subscriptions	SubjectEmail	Email subject of the PDF report notification.
Subscriptions	SecondEmailSubjectEmail	Email subject of the summary notification.
Subscriptions	FromAddress	The notification sender email address Default: jobs@merlot.aero

Note: Do not modify other parameters as it may prevent the system from processing your subscriptions.

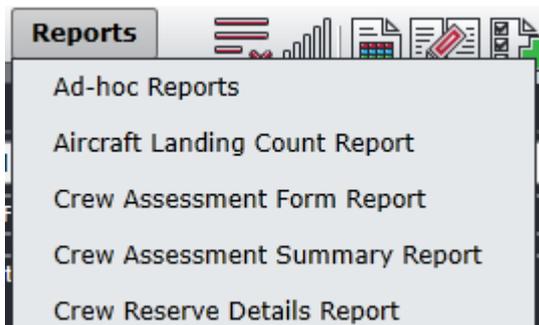
Below is an example of a Simulator Assessment report automatically sent as a PDF via email.

merlot.aero-Flight Crew Assessment Form				Simulator Assessment					
Flight Crew Name		Company Number		Rank					
Batts, Melinda		00006570		Captain					
Date	Variant	Sim No.	Recurrent	Other					
02/Dec/2013			X						
An/Line	F/Up	Other							
		SIG	MOD	LOW			SIG	MOD	LOW
Technical Conditions				X	Weather Conditions			X	
Line	Operational Simulation	CHECK ITEM	R	GRADING	PERF MARKERS				
1	Knowledge of AIP and Aircraft General			4					
2	Briefings			4					
3	Engine Start	Normal, Abnormal		3					
4	Ground Handling (Push back and Taxi)	Low Vis		4					
5	Takeoff	Low Vis, Crosswind, Tailstrike Awareness		4					
6	Climb, Cruise, Descent			4					
7	Inflight Contingency	Hydraulics, Pressurisation, Anti-Ice, Electrical, APU, Landing Gear, Engine, FMC, Fuel, Pax Evac, TCAS, GPWS / Windshear		3					
8	TEM Considerations and non-technical skills			3					
9	Instrument Approach Types			4					

More information about setting up subscriptions are available on the Merlot Aero wiki:
<https://merlot.atlassian.net/wiki/display/KB/Create+PDF+from+the+reports+and+send+it+to+email>

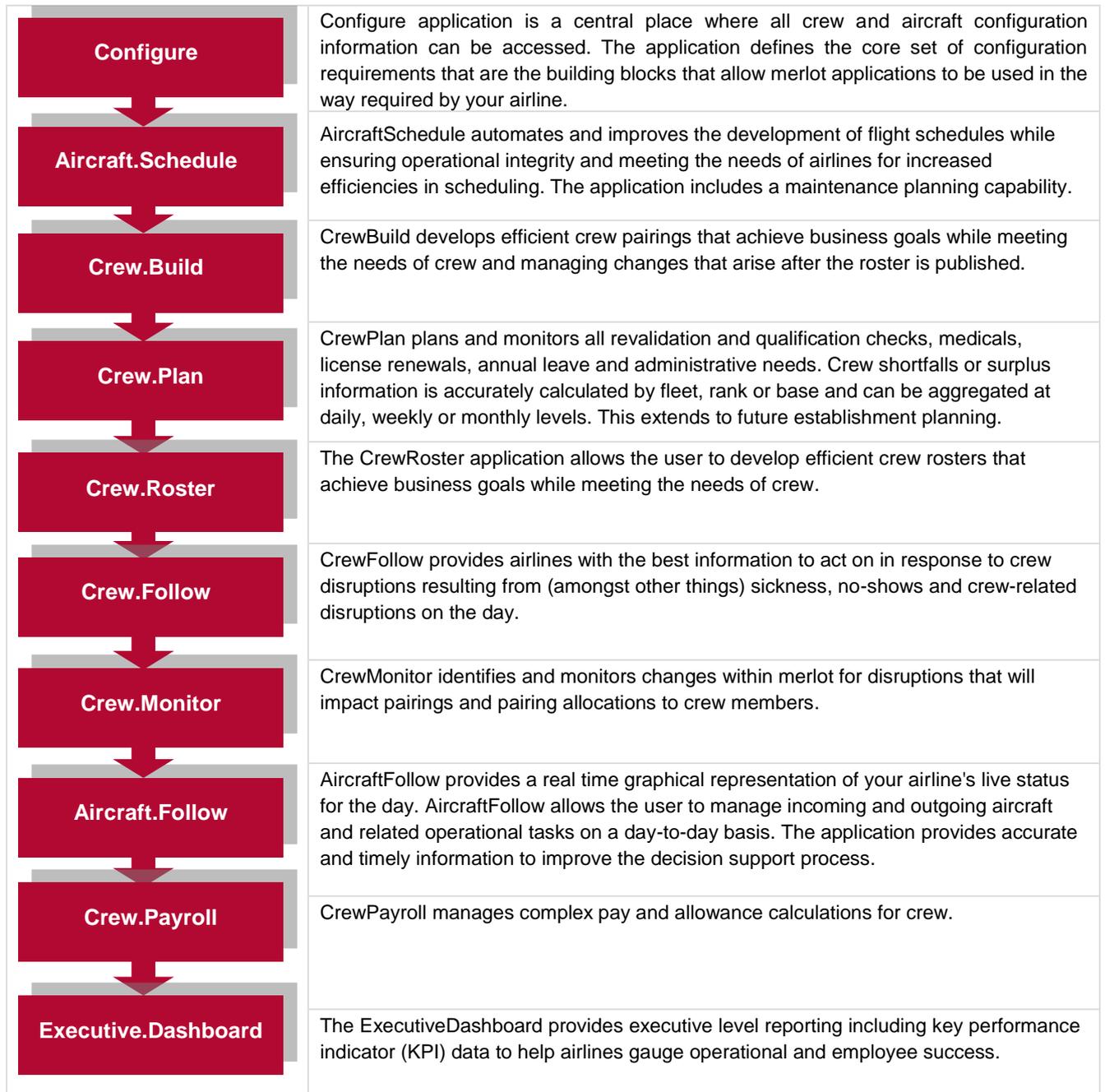
Viewing Assessment Results and Reports on Merlot Aero web portal

To view crew assessment results and reports on demand, go to **CrewRoster > Reports**, then select either the **Crew Assessment Form Report** or **Crew Assessment Summary Report** menu item.



Application Flow Diagram

The flow diagram is an overview of merlot.aero's crew and aircraft applications which comprise the Airline Operations Management System (AOMS). The flow diagram reflects the overall flow from configuration to operational processing to executive level reporting.



CrewAssessment Glossary

Field	Description
Assessment	A course activity where an instructor or examiner evaluates a crewmember to determine if the qualification will be initiated or renewed.
Examiner	A person tasked to evaluate a crewmember for a course. The examiner can be part of the crew group or not.

Notes