

SOP-OPS-EA-25**Creating and Monitoring Read & Signs****PURPOSE**

This SOP has been developed to provide guidance to Station Leaders and all others responsible for creating and monitoring Read & Signs.

SITUATION AND ASSUMPTIONS

All Read and Signs will be created in Vortex by the appropriate leader at a local station or by a member of the Corporate Team. It is the local leadership team's responsibility to ensure Team Members complete Read & Signs in a timely fashion.

CONCEPT OF OPERATIONS

To create a new Read & Sign complete the following steps:

1. Log into Vortex and choose the Training Module:

Dashboard

You have 2 training items due. [View](#)



Users



Email Addresses



Help



Flight Log



Status Log



Tenants

1



Training



Work Orders

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2. Select the Training tab

Training

You have 2 training items due. [View](#)

2 Actions Records **Training** Checklists Settings Reports

Add Training Record Add Bulk Training Records View Training Records View Your Training Due

3. Under the 'All Training' drop down menu select 'Read and Sign' and then select 'Add Item'

Training

You have 2 training items due. [View](#)

3 Actions Records Training Checklists Settings Reports

+ Add Item All Categories All Positions All Statuses **Read & Sign**

4. Under the 'Category' field select the applicable category e.g. 'Read & Sign' 'Air Canada Jazz'
a. **all categories should use 'Read & Sign' as the first selection*

Actions Records **Training** Checklists Settings Reports

Add Training

Use the form below to add a new training item.

Training Information	
Status	Active
4 Category	Read & Sign Air Canada Jazz

5. In the 'Name' field enter the title of the document

Document or Bulletin or Change # (as specified by issuer) / Document Title (as specified by issuer)

Using the example below, the Read & Sign name should be:

Name in Vortex: **WSAS-2023-17 / WestJet's animal acceptance policy updates**



Airport Standards Communication

Applicable To	All Airports
Business Unit	Airport Operations
Change No.	WSAS-2023-17
Release Date	June 26, 2023
View By Date	June 26, 2023
Effective Date	July 5, 2023

Westjet's animal acceptance policy updates

Another example:

Name in Vortex: **2023-05 / 2023 Dangerous Goods Update**



Ground Operations Manual Bulletin

Bulletin No: 2023-05
Subject: 2023 Dangerous Goods Update
Applicable to: Swoop Operations
To: Swoop Certified Agents
Date: May 19, 2023
Effective: May 23, 2023

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Another Example:

Name in Vortex: **Terminal Operations Bulletin 23-02 / Temporary Pass (3M) Procedures**

**TERMINAL OPERATIONS BULLETIN 23-02**

To: Terminal Operations Team, Barber Collins, EA, CATSA, CBSA, Serv-U-Clean, Wingstars, Chartright, Flightline, Edelweiss, Wright International, Summit fuel, ROW

From: Airport Pass Control

CC: Airport Management Group

Date: May 16, 2023

Subject: Temporary Pass (3M) Procedures

6. In the 'Description' field enter a brief overview of the document details
- 7. Enter your name: "Read & Sign created by _____"**
8. In the 'Company' field enter the company responsible for the document
9. The 'Jazz Course ID' is not applicable
10. The 'Estimated Hours', 'Estimated Cost' fields are not applicable
11. In the 'Documents' field, upload the Read & Sign by selecting 'Choose File' and navigating to where the file has been saved. **Do not put the document into the Notes section.**
 - a. .pdf files are recommended for the best display on phone, tablet, or computer

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Name	5		
Description	6		
Requirements	7		
Company	8		
Jazz Course ID	N/A		
Estimated Hours	N/A		
Estimated Cost	Training: N/A	Travel: <input type="text"/>	Overtime: <input type="text"/> Total: <input type="text"/>
Documents	Choose File No file chosen 11		

12. The next section is required to identify the training item as a Read & Sign

- a. Select the 'Require users to Read & Sign' check box which will expand options to assign specific positions, groups, or individual users
- b. Select the 'Send an email notification to required users (on save)' to have an email sent to the desired team members that will provide a copy of the Read & Sign and a link to complete the verification that the document has been read and understood through their Vortex account

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Read & Sign	<input checked="" type="checkbox"/> Require users to Read & Sign
	<input checked="" type="checkbox"/> Send an email notification to required users (on save)

13. The 'Required Frequency' field is auto selected to 'Once'

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Required Frequency	<input checked="" type="radio"/> Once
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14. In the 'Required By' section you have three options noted below to assign the Read & Sign based on your administrator Training Group settings. *If you believe that additional positions, groups, or users are required please connect with a Corporate Training team member

- a. **Position** – allows selection of end recipients based on positions set up in training which can be defined by role e.g. ground handler lead and by airline
- b. **Group** – allows selection of end recipients by department e.g. Terminal Operations
- c. **User** – allows selection of individual team members

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Required By Position Group User

15. In the 'Expiry Date' section you can set an expiry date for the document if applicable.
- An expiry date can also be added later if the information is no longer applicable or has been incorporated into a manual or procedure etc.
 - When an expiry date is selected, any new team members who are set up after the expiry date who would have been assigned the document will not see it in their due Read & Sign items.
 - Active Team members will see the document as due until they have completed the Read & Sign.
 - If a Read & Sign is no longer required after it has been issued, either with or without an expiry date:
 - Specify the date it was no longer required, and check the box "No longer due for users..." This ensures the Read & Sign is changed to "inactive status" so that Team Members who have not already completed it are no longer required to do so.

16. The 'Regulatory Requirement' field should be set to either 'Yes' or 'No' as applicable

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Expiry Date	<input type="radio"/> None <input checked="" type="radio"/> Specify <input type="text"/>	<input type="checkbox"/> No longer due for users after expiry date (change training item status to "Inactive")
Regulatory Requirement	<input checked="" type="radio"/> Yes <input type="radio"/> No	

17. After reviewing all information is accurate and the intended end recipients is correct you can select either 'Save' or 'Save & Close' to send the Read & Sign

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<input checked="" type="checkbox"/> Save	<input checked="" type="checkbox"/> Save & Close	<input type="checkbox"/> Duplicate	<input type="checkbox"/> Cancel
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To review and print Read & Sign progress:

There are two ways to review Read & Sign progress:

Training Reports Tab

This functionality mirrors the reporting available to you for all types of training:

To view a report of **Due** Read & Signs:

- Report Format: Select **Training due** (applicable way you want to see the Read & Sign report)
- Due Date: Not required
- Groups: Specify and select the group you require the report for

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4. Positions: Specify If you wish to narrow your report, choose the applicable position
5. Employees: Specify I you wish to have a report for a specific person
6. Training: Specific "Read & Sign"
7. Create Report: On-screen report that you can print in PDF format
8. Export: Excel report you can manipulate later

To view a report of **Complete** Read & Signs:

1. Report Format: **Select Training completed, grouped by employee**
2. Due Date: Not required
3. Groups: Specify and select the group you require the report for
4. Positions: Specify If you wish to narrow your report, choose the applicable position
5. Employees: Specify I you wish to have a report for a specific person
6. Training: Specific "Read & Sign"
7. Create Report: On-screen report that you can print in PDF format
8. Export: Excel report you can manipulate later

Reporting for an individual Read & Sign:

1. In the training module, select the 'Training' tab
2. Under the 'All Training' drop down menu select 'Read and Sign'
3. If required, you can further refine your search through the 'All Categories', 'All Positions' and 'All Statuses' drop-down menus
4. From the list, select the applicable Read & Sign that you would like to review e.g. ASB 06-2023 Air Canada Jazz Read & Sign

1

2

3

4

Training Search (1 - 8 of 8)		View All
Name	Category	
Air Canada Test group	Ramp Operations: Jazz	
ASB 06-2023	Read & Sign: Air Canada Jazz	

5. The 'Edit Training' page will open when the file has been selected

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★ Training

You have 2 training items due. [View](#)

- Actions
- Records
- Training
- Che

5 Edit Training

Use the form below to edit this training item.

Training Information

6. Scroll down to the 'Read & Sign' section and select 'View Read & Sign Status'

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Read & Sign Require users to Read & Sign
 Send an email notification to required users (on save)

7. A pop-up will appear showing a list of all Team Members who have been assigned the Read & Sign. The completion status will be indicated for each Team Member with a check mark and date for those who have completed the Read & Sign or a red X for those who have not in the 'Status' column

Read & Sign

ASB 2023-05 Jazz-AC Differences (May 15, 2023)

- 8 Print
- 9 Email Reminder

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Employee	Status
Adrian Lasook	X
Alec Jan Macatuno	X
Braden Wheeler	X
Braydon Bender	X
Christopher Swierzbins	X
David Genders	X
Gurinder Singh	✓ May 20, 2023 (2023-13897)

In addition to the review screen, you have two additional options from this screen:

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- 'Print' a copy which will open a new screen and produce a .pdf copy of the review including the associated training file number for those who have completed the Read & Sign

**Read & Sign**

ASB 2023-05 Jazz-AC Differences (May 15, 2023)

Employee	Status
Adrian Lasook	X
Alec Jan Macatuno	X
Braden Wheeler	X
Braydon Bender	X
Christopher Swierzbis	X
David Genders	X
Gurinder Singh	Yes May 20, 2023 (2023-13897)

- 'Email Reminder' can be selected to automatically push a notification out to all remaining Team Members who have yet to complete the Read & Sign. You will receive a warning prompt prior to sending. Click "OK" to send. * Note: automatic reminders are sent out 1 x weekly on Mondays

execaviation.vortexcms.com says

Are you sure you want to email a reminder to the users that haven't completed this read & sign?



We will be adding additional reporting functions as Phase II of the Read & Sign implementation.

ORGANIZATION AND ASSIGNMENT OF RESPONSIBILITIES

This SOP applies to all Team Members responsible for creating and monitoring Read & Signs.

SPECIAL CONSIDERATIONS

N/A



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RESOURCES AND LOGISTICS

N/A

PROCEDURE DEVELOPMENT AND MAINTENANCE

This procedure will be owned by Director – Brand Experience and will be reviewed annually.

RELATED DOCUMENTS

N/A



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