

E-KSF (the KSF online Tool)

User Guide for e-KSF Administrators

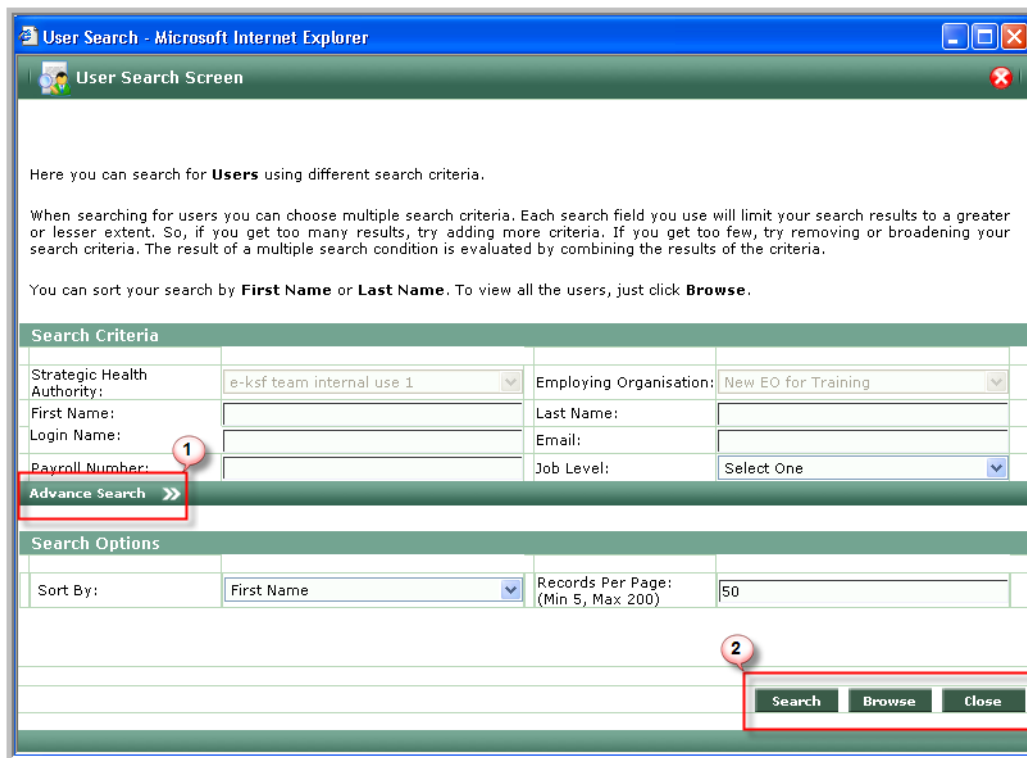
Defining Process “Assign PO to Staff”

e-KSF version 6

The following document describes how you, as e-KSF Administrator, can Assign, Replace or Archive Post Outline to a staff. It is assumed you have already got Manager/E-KSF Administrator access and login. If not, please contact the support desk.

E-KSF Administrator - Manage Post Outlines to staff without managers

If you are **e-KSF administrator**, you can only manage and assign Post Outlines to orphan staff (staff without an assigned manager). To do this click on the “**Assign PO to Staff without Manager**” link on the Employing Organisation Administrator Home Page. **Clicking that link** will take you to user search screen shown in Figure 1.



The screenshot shows a web browser window titled "User Search - Microsoft Internet Explorer". The page content includes instructions on how to search for users and a search form. The search form is divided into two sections: "Search Criteria" and "Search Options".

Search Criteria:

Strategic Health Authority:	e-ksf team internal use 1	Employing Organisation:	New EO for Training
First Name:		Last Name:	
Login Name:		Email:	
Payroll Number:		Job Level:	Select One

Below the search criteria is an "Advance Search" button with a right-pointing arrow, highlighted with a red box and labeled with a circled "1".

Search Options:

Sort By:	First Name	Records Per Page: (Min 5, Max 200)	50
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At the bottom of the search options section, there are three buttons: "Search", "Browse", and "Close", all highlighted with a red box and labeled with a circled "2".

Figure 1: User Search Screen - E-KSF Administrator

At this screen, you can search for staff using various criteria. If you wish to carry out an advanced search, you can click the above highlighted “**Advance Search**” button (numbered as 1 in Figure 2). Once you have provided the search criteria, click “**Search**” to find the individual staff member record or click “**Browse**” to get all staff records for your organisation that are present in the system.

Doing this, you will be taken to a new screen displaying staff where no manager has been assigned but who do have a post outline currently assigned. On this screen you will be able to see some icons against each staff row, displaying respective information about each staff (see Figure 3).

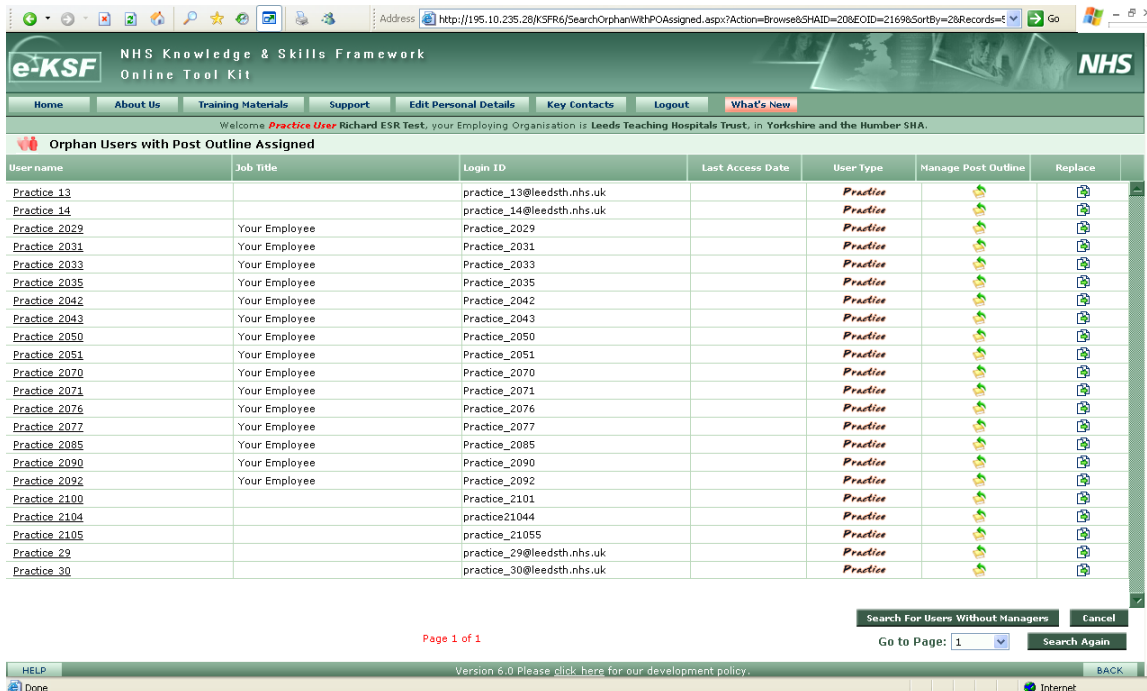


Figure 3: User Search Screen - E-KSF Administrator

Managing Post Outlines

Click on the 'Manage Post Outlines' icon brings up a pop up window which allows you to un-assign, archive or replace an Outline (figure 4).

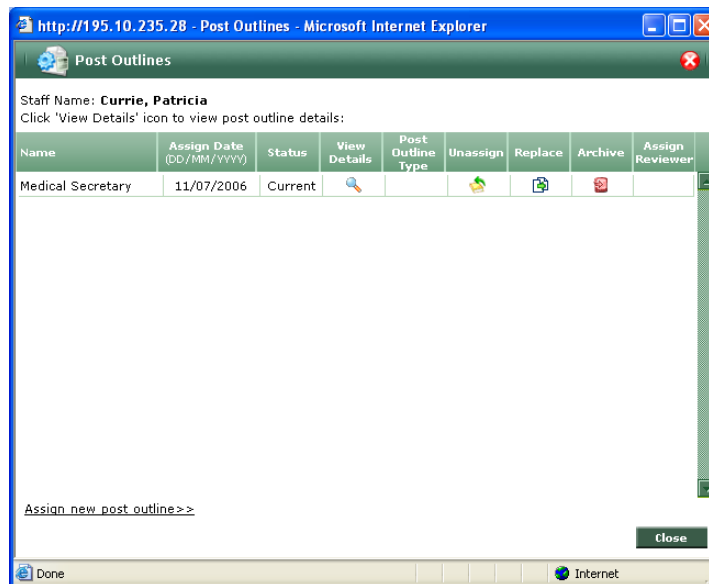


Figure 4

You can view the Post Outline by clicking on the “View Details” icon (See Figure 4) will display the details of that particular outline.

You can explicitly archive a PO. For this, click on the icon “Archive” (See figure 4). A pop-up window will open asking for confirmation if you really want to change the status of this particular PO or not. If you don’t want to archive it, click the “No” button, if you do want to archive this click on the “Yes” button. You will be shown a confirmation message upon successfully archiving the PO. You must remember however that once you archive the PO it cannot be un-archived and you will have to assign this or another outline again.

You can un-assign an outline by clicking on the un-assign icon. This removes the post outline from the individual. The system will not allow you to “un-assign” a PO if some data is present with this particular post outline against Planning Information and/or PDR.

You can replace an Outline by clicking on the “Replace” icon which will open a “Search Post Outline” screen (See Figure 5). At this screen, you have the option to search PO by different ways (post title, keywords, and dimension for example). Once you have filled in the boxes with your specified search requirements, click the “Search” button.

Alternatively, you can browse for all the post outlines in the system by clicking the “Browse” button – just remember, if you do this, you will get ALL the outlines available in the tool which, depending on the size of your organisation, could be many pages long.

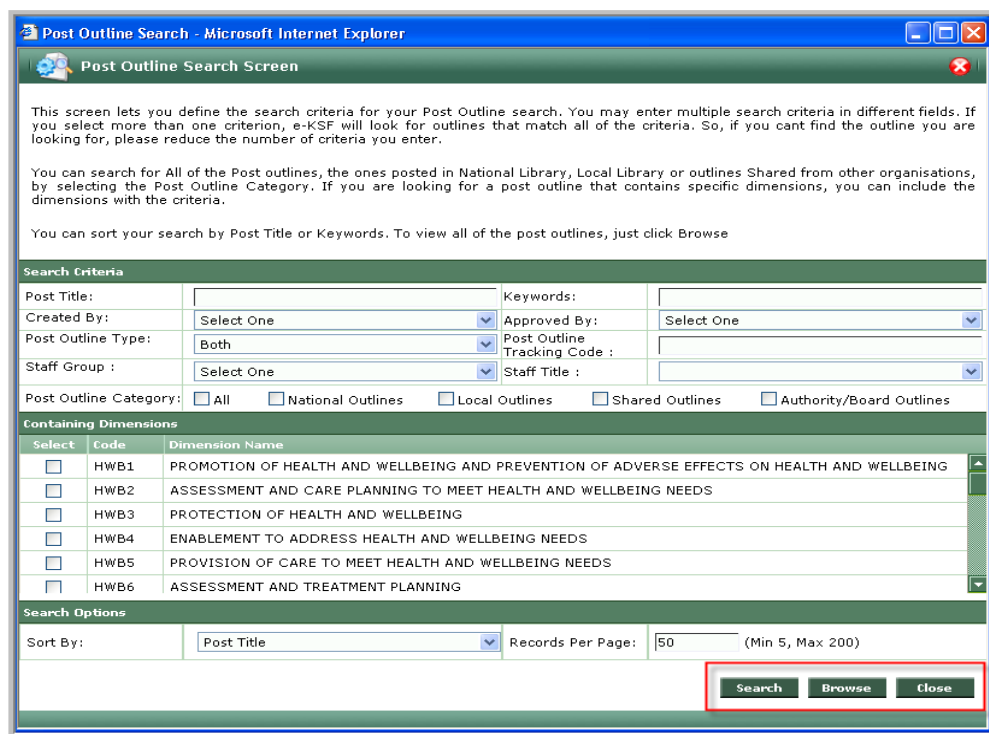


Figure 5: PO Search Screen - E-KSF Administrator

Once decided on "Search" or "Browse" You will be directed to the search results page (Figure 6).

NHS KSF 2004	Post Title	Health Authority / Board or Country	Employing Organisation	Keywords	Creator Name	View Details	Post Outline Type	Select
<input checked="" type="checkbox"/>	abc	e-ksf team internal use 1	New EO for Training	Live_PO_02	Naveed Khan		Broad	
<input checked="" type="checkbox"/>	abc2	e-ksf team internal use 1	New EO for Training	Keywords:	live First Name live Last Name			
<input checked="" type="checkbox"/>	abc3	e-ksf team internal use 1	New EO for Training	Keywords	firsta last			
<input checked="" type="checkbox"/>	Access_PO_Manager_17.07.06_01	e-ksf team internal use 1	New EO for Training	Access_PO_Manager_17.07.06_01	live First Name live Last Name			
<input checked="" type="checkbox"/>	Accessibility_PO_01	e-ksf team internal use 1	New EO for Training	Accessibility_PO_01	Bug Check			
<input checked="" type="checkbox"/>	Accessibility_PO_Manager_01	e-ksf team internal use 1	New EO for Training	Accessibility_PO_Manager_01	live First Name live Last Name			
<input checked="" type="checkbox"/>	adil "Ahmed" test	e-ksf team internal use 1	New EO for Training	test	Adil's Ahmed			
<input checked="" type="checkbox"/>	adil "Ahmed" test2	e-ksf team internal use 1	New EO for Training	test	Adil's Ahmed			
<input checked="" type="checkbox"/>	adil "Ahmed" test3-later option	e-ksf team internal use 1	New EO for Training	test	Adil's Ahmed			
<input checked="" type="checkbox"/>	ahmad	e-ksf team internal use 1	New EO for Training	Keyword	live First Name live Last Name		Broad	
<input checked="" type="checkbox"/>	ahmads	e-ksf team internal use 1	New EO for Training	12345	live First Name live Last Name		Broad	
<input checked="" type="checkbox"/>	ahmed	e-ksf team internal use 1	New EO for Training	Keyword	live First Name live Last Name			
<input checked="" type="checkbox"/>	ahmads	e-ksf team internal use 1	New EO for Training	Keyword	live First Name live Last Name		Practice	
<input checked="" type="checkbox"/>	Approve_Reject	e-ksf team internal use 1	New EO for Training	Aprove_Reject	live First Name live Last Name			

Figure 6: PO Search Results - E-KSF Administrator

At this page, you can select the required post outline to assign it to the staff, by clicking the "Select" icon present in the last column (Highlighted in Figure 6). As you select a post outline to be assigned to a staff member, you will be directed to a new screen as below, where you will be required to provide payroll information for the individual (See Figure 7).

ESR Assignment Number:	Select
Employee Name:	Sarah Smith
Manager Name:	Richard Bradbury
Already Assigned Post Outline:	
Staff's Specific Post Title: *	Chaplaincy Secretary
Pay Band:	None
Pay Point: *	None
Gateway: *	None
Increment Date: *	31/10/2007 DD/MM/YYYY

Figure 7: PO Basic Information - E-KSF Administrator

All the information is mandatory here; you will need to know what the individual's ESR Assignment number is and which gateway to choose. E-KSF will then automatically populate the pay-points and incremental dates of the staff member. If you do not have this information, you may need to contact your Human Resources office, KSF lead or the individual. Once done, click “**Submit**” button and the post outline will be assigned to that staff, replacing the current Post Outline. The confirmation message will also be displayed to you.

To also assign a new PO in addition to an existing PO, without changing the status of existing PO (both the new and previous PO will share the same status “Current” and this scenario will be applicable in case where a staff has multiple jobs and therefore multiple Post Outlines). You can do this by clicking on the “Assign new Post Outline” link at the lower right of the window. This will take you to screen shown in Figure 5. The rest of the procedure will be same as on the previous pages. Once you are done, this PO will be added in staff's record, with status ‘Current’.

Assigning Outlines to Staff without Managers

To assign an outline to a member of staff without an assigned manager or previously assigned Post Outline, click on the ‘Search for Users Without Managers’ button (highlighted below in figure 8)

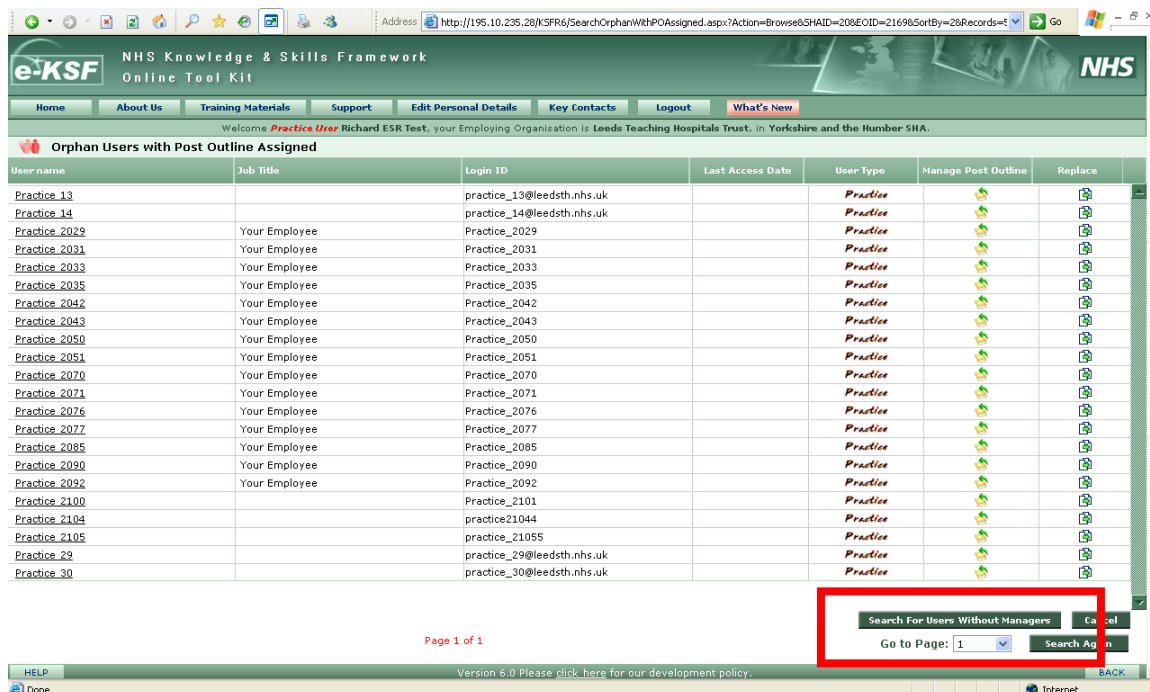


Figure 8

This will bring up a search box (Figure 9), add search criteria and then click on the search button, or use Browse to see all staff without assigned managers.

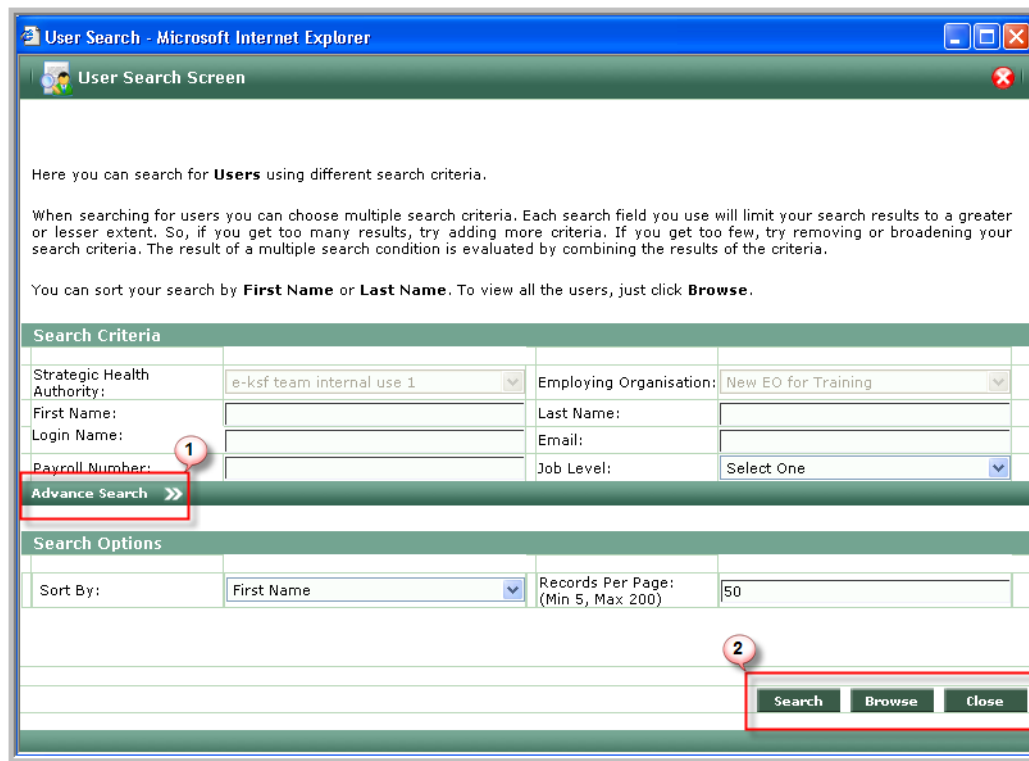


Figure 9: User Search Screen - E-KSF Administrator

At this screen, you can search for staff using various criteria. If you wish to carry out an advanced search, you can click the above highlighted “**Advance Search**” button (numbered as 1 in Figure 9). Once you have provided the search criteria, click “**Search**” to find the individual staff member record or click “**Browse**” to get all staff records for your organisation that are present in the system.

Doing this, you will be taken to a new screen displaying staff where no manager has been assigned. On this screen you will be able to see a select (green tick) icon against each staff row. Clicking on the green tick icon will open a “Search Post Outline” screen (See Figure 10). At this screen, you have the option to search PO by different ways (post title, keywords, and dimension for example). Once you have filled in the boxes with your specified search requirements, click the “**Search**” button.

Alternatively, you can browse for all the post outlines in the system by clicking the “**Browse**” button – just remember, if you do this, you will get ALL the outlines available in the tool which, depending on the size of your organisation, could be many pages long.

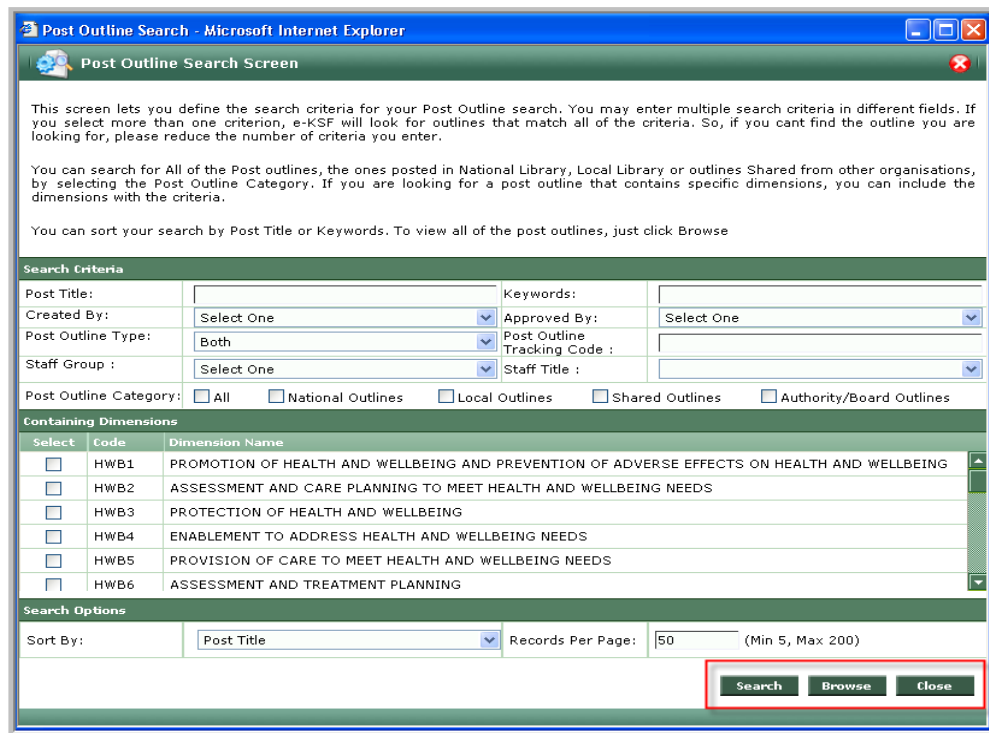


Figure 10: PO Search Screen - E-KSF Administrator

Once decided on “Search” or “Browse” You will be directed to the search results page (Figure 6).

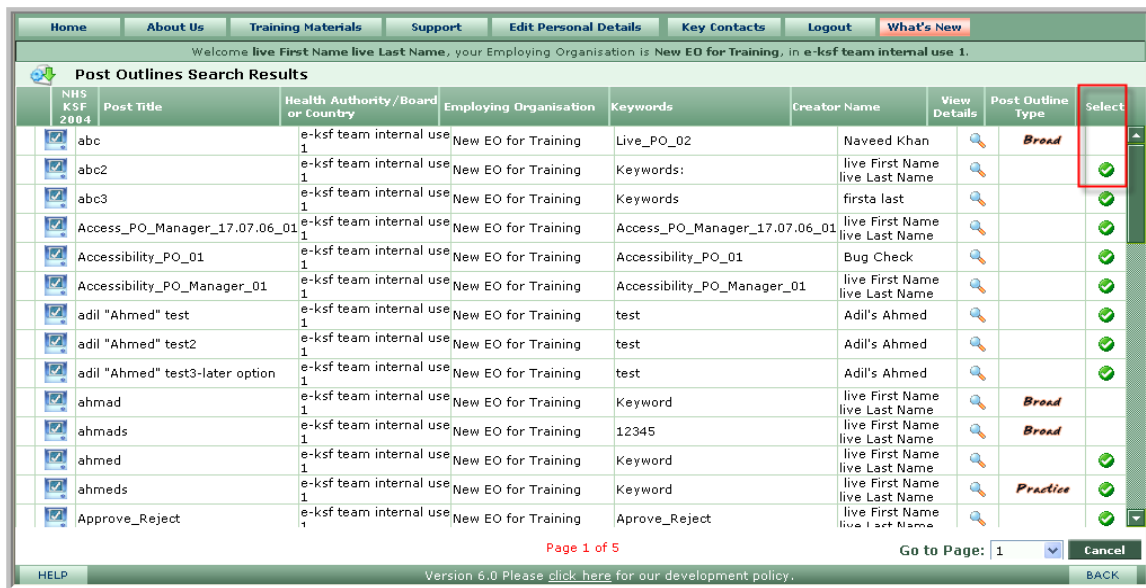


Figure 6: PO Search Results - E-KSF Administrator

At this page, you can select the required post outline to assign it to the staff, by clicking the “Select” icon present in the last column (Highlighted in Figure 6). As you select a post outline to be assigned to a staff

member, you will be directed to a new screen as below, where you will be required to provide payroll information for the individual (See Figure 7).



Basic information on the Post Outline	
ESR Assignment Number:	Select <input type="button" value="v"/>
Employee Name:	Sarah Smith
Manager Name:	Richard Bradbury
Already Assigned Post Outline:	
Staff's Specific Post Title: *	<input type="text" value="Chaplaincy Secretary"/>
Pay Band:	None <input type="button" value="v"/>
Pay Point: *	None <input type="button" value="v"/>
Gateway: *	None <input type="button" value="v"/>
Increment Date: *	<input type="text" value="31/10/2007"/>  DD/MM/YYYY

Figure 7: PO Basic Information - E-KSF Administrator

All the information is mandatory here; you will need to know what the individual's ESR Assignment number is and which gateway to choose. E-KSF will then automatically populate the pay-points and incremental dates of the staff member. If you do not have this information, you may need to contact your Human Resources office, KSF lead or the individual. Once done, click "**Submit**" button and the post outline will be assigned to that staff, replacing the current Post Outline. The confirmation message will also be displayed to you.

Note: If this guide does not answer all your questions, please take time to write to contact@e-ksf.org or support@e-ksf.org. More manager documents for the tool are available from our interactive guide on www.e-ksfnw.org.