

E-KSF (the KSF online Tool)

User Guide for e-KSF Administrator

Defining Process “Assign Manager to Multiple Staff”

The following document describes how you, as e-KSF Administrator, can assign manager to multiple staff at a time. It is assumed you have already got Manager/e-KSF Administrator access. If not, please contact the support desk.



e-KSF now allows you to assign a manager to multiple staff in a single operation. You can assign a new manager or you can replace the existing one.

The process is simple. Select a user by searching from list, select manager by searching from list and add him as manager for selected staff. To assign/change a manager to multiple staff, simply follow these instructions: Click on the “**Quick Assign Manager to Multiple Staff**” link (highlighted below in red) from your home page.

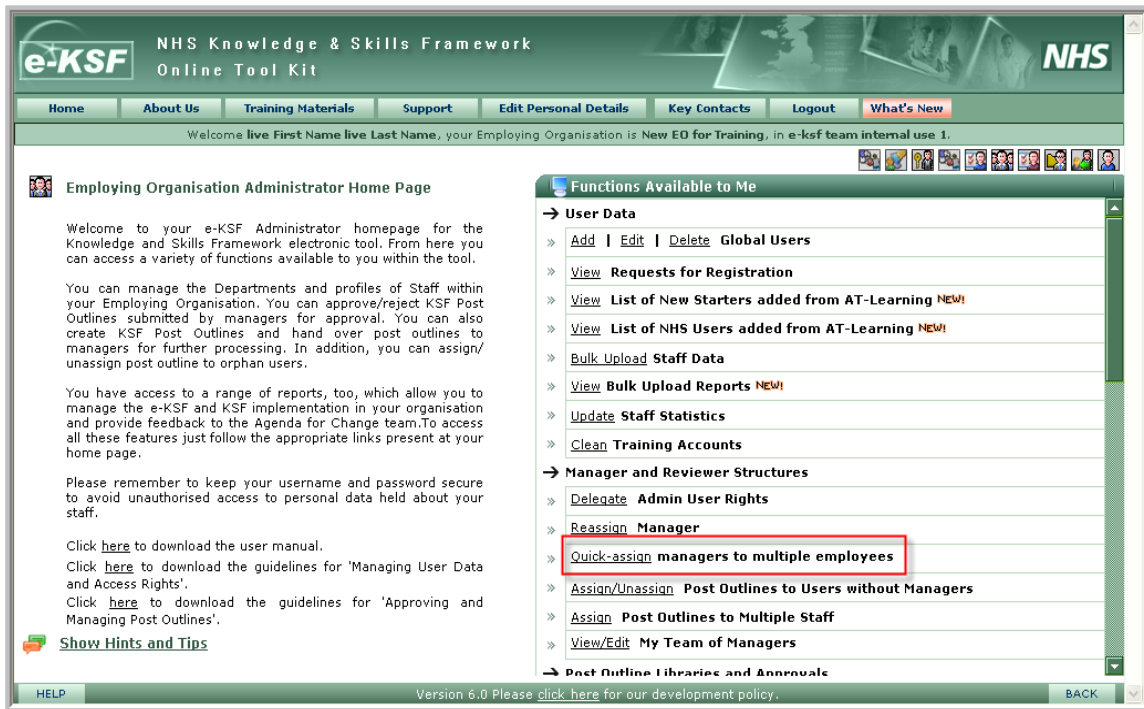


Figure 1: e-KSF Administrator’s Home Page

On clicking the above highlighted link, you will be directed to a user search screen shown in Figure 2.

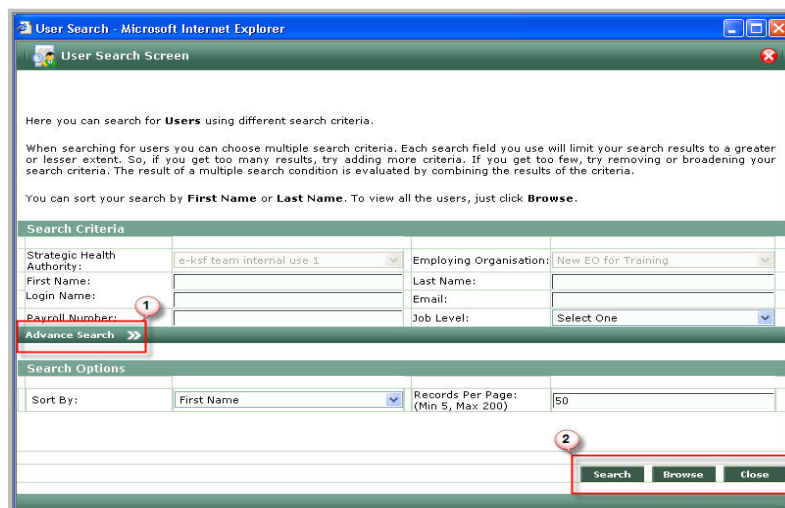


Figure 2: User Search Screen

At this screen, you can search for staff to whom you want to assign a manager, by specifying the search criteria. If you wish to carry out the advance 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**” button to find the staff member or “**Browse**” button to get all staff records of your organisation (numbered as 2 in Figure 2).

You will then be taken to a new screen displaying staff that meet the search criteria, or, in the event that you clicked “**Browse**”, to the screen displaying a list of all staff records. You will also be able to see some information within each staff row, displaying relationship/organisational information about the specific staff member (see Figure 3).

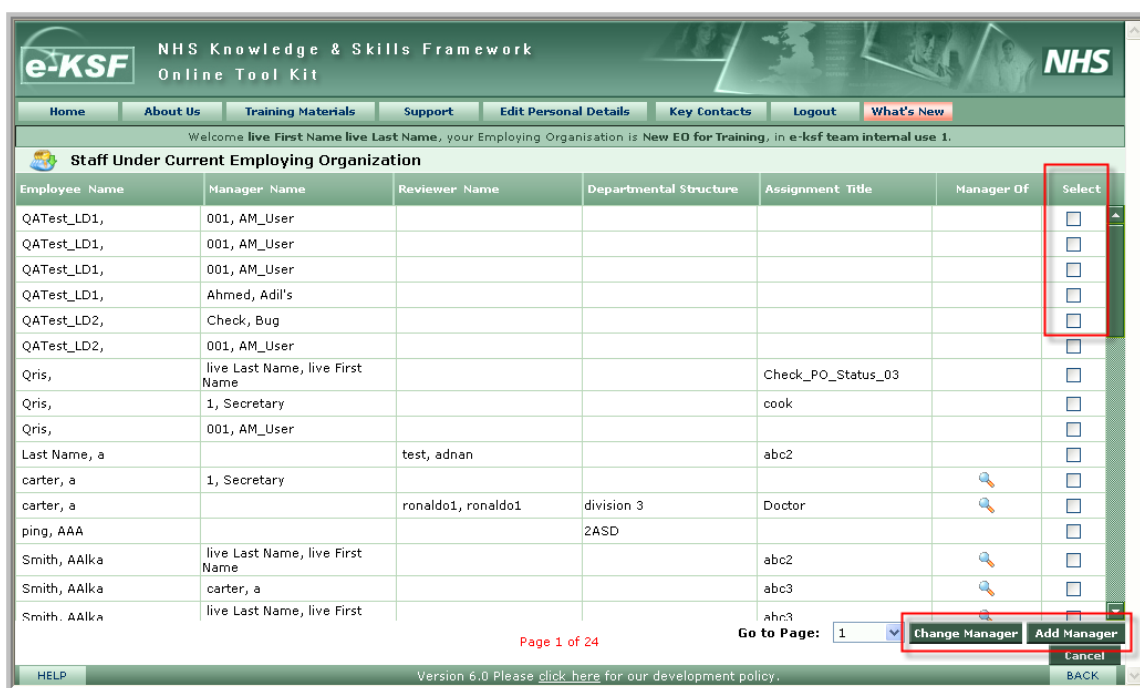


Figure 3: User Search Results

Assigning Manager to Multiple Staff:

To assign a manager, select the required staff from the list by ticking in the boxes at the extreme right hand side of each row. Once done, click the “**Add Manager**” button displayed in the bottom right hand corner on the screen (Highlighted in Figure 3 above). Clicking this icon will take you to the “Manager Search” screen exactly like the one displayed in Figure 2. Provide the search criteria, as discussed above, and click “**Search**”. A new screen will be opened containing a list of all managers matching the search criteria. Select the manager you want by clicking the green tick present against the manager’s name (Highlighted in Figure 4). A confirmation message will be displayed to you to indicate the completion of the action.

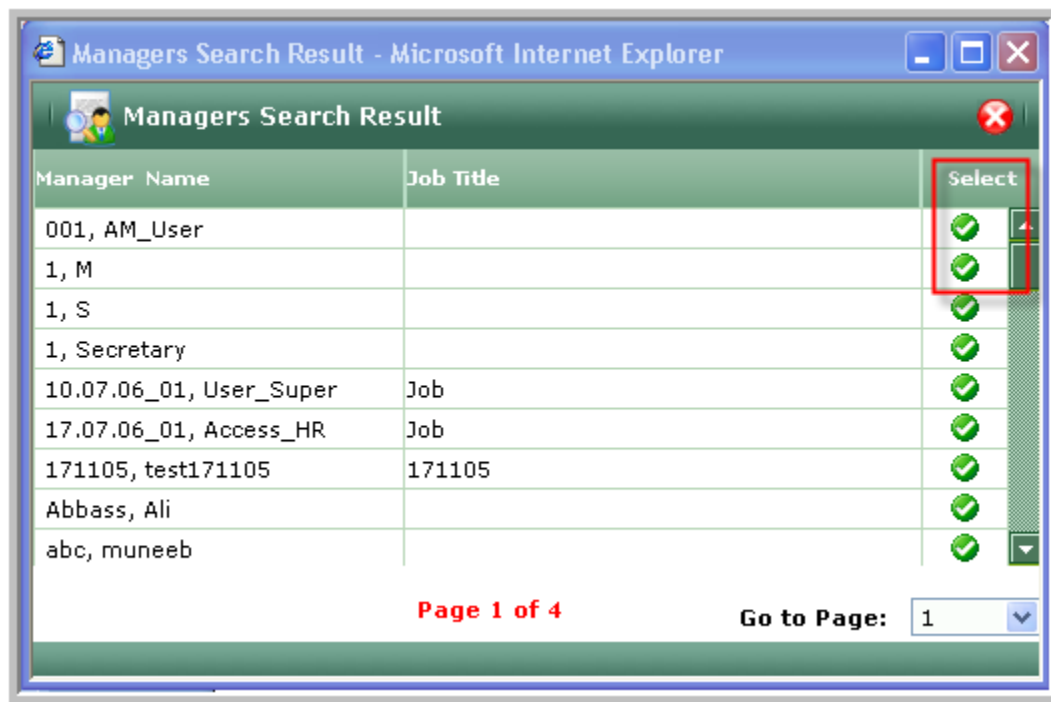


Figure 4: Manager Search Results

Change Manager for Multiple Staff:

To change a manager, select the required staff from the list by ticking in the boxes at the extreme right hand side of each row and click on the button “**Change Manager**” displayed in the bottom right hand corner of the screen (Highlighted in Figure 3).

On clicking the above highlighted link, you will be directed to a manager search screen exactly similar to one shown in Figure 2.

Once done, you will be taken to a new screen displaying a list of all managers matching the search criteria that you provided. Select the manager you want by clicking the green tick present at the end of the row on the right hand side (Highlighted in Figure 4). The existing manager of the staff will be replaced with the new manager. A confirmation message will be displayed to you to indicate the successful change of manager.

You will also see a ‘magnifying glass’ icon under the column heading of “Manager of” for some of the staff entries on screen (shown in Figure 3). This icon will only be displayed against those staff who themselves are acting as managers for staff. To view the details of these staff members, click on the ‘magnifying glass’ icon and a new pop-up window will open containing a list of staff working under that particular manager.

To reassign all or a selection of staff to a new manager from this pop-up window, select the new manager from the drop-down menu titled ‘New Manager’, select the staff from the list by checking the boxes against each individual and click “**Save**”. A confirmation message will be shown to you if manager is successfully assigned.

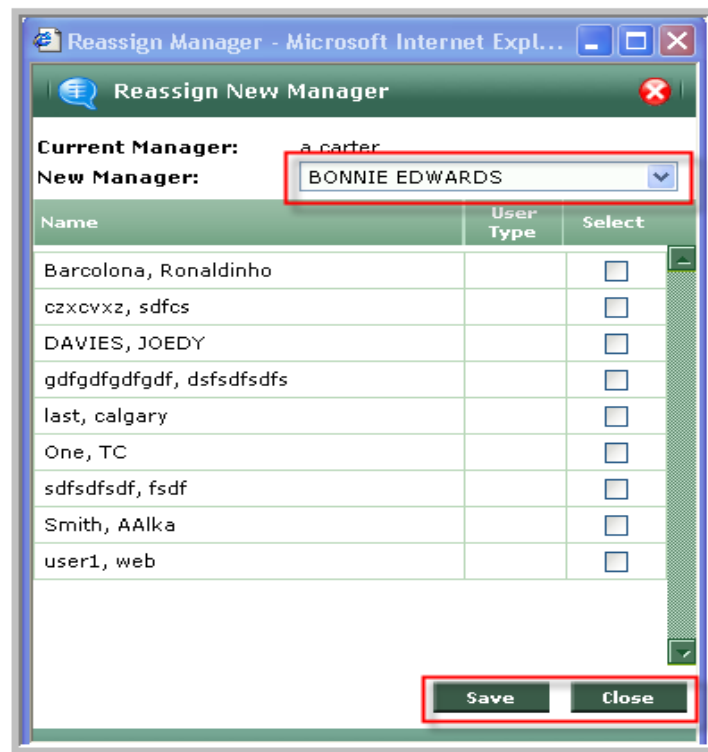


Figure 5: Reassign Manager

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.