

E-KSF (the KSF online Tool)

User Guide for Managers

Defining Process “Assign PO to Staff”

e-KSF version 6

The following document describes how you, as Manager or 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.



User Guide for Managers

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As an e-KSF Manager you can assign KSF post outlines to your staff. Only by assigning a post outline can you access the options for PDP’s, objective setting, join development reviews etc. The career development and future growth of an individual depends on fulfilling the requirements of the assigned post outline.

1. Manager’s Link to Assign PO

Assigning Post Outline to Staff:

To assign a post outline to the staff, simply follow these instructions.

Click on the “Assign Post Outline to Staff” link (highlighted below) from your home page.

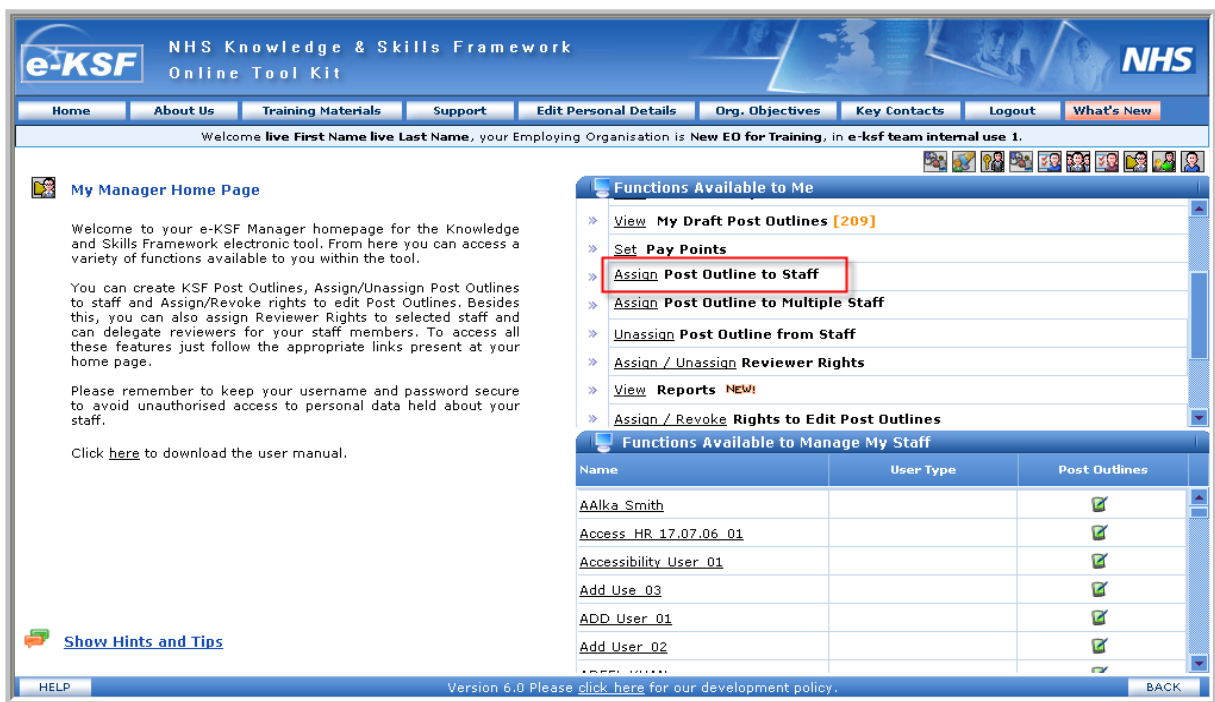


Figure 1: Manager’s Home Page

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

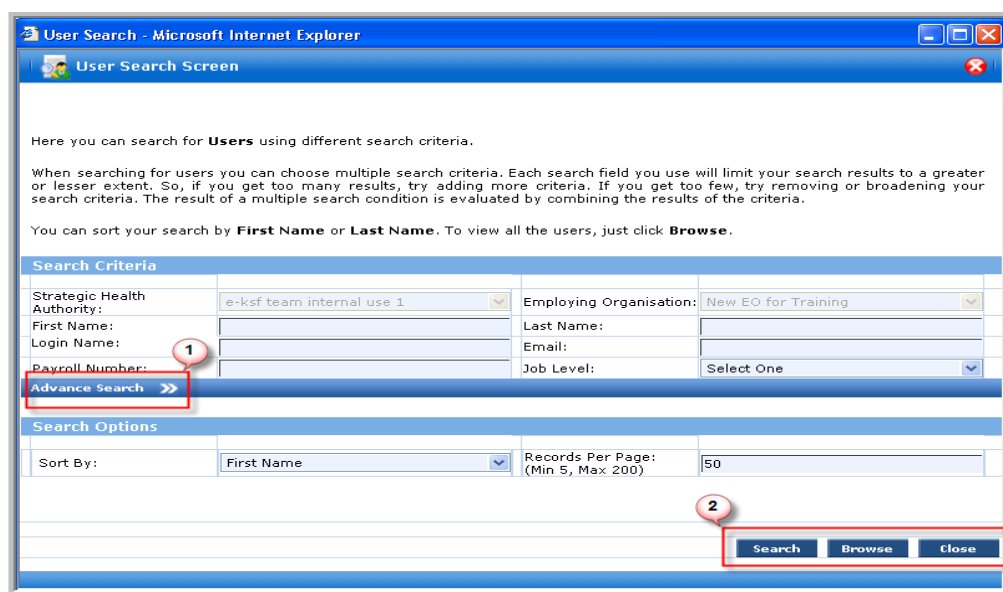


Figure 2: User Search Screen

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 department that are present in the system (numbered as 2 in Figure 2).

If you do not see all of your staff in the search results or staff that you do not manage please contact your local eKSF Administrator who can correct this for you (click Key Contacts on the main homepage for their contact details).

Doing this, you will be taken to a new screen displaying required staff in case if you provided some specific criteria for search, or to the screen displaying a list of all staff records in case you clicked “**Browse**”. In either case, you will be able to see some icons against each staff row, displaying respective information about each staff (see Figure 3).

Name	Employee Job Title	Login Name	Last Access Date (DD/MM/YYYY)	Record Modified Date (DD/MM/YYYY)	User Type	Assign Post Outline
Smith, AAlka		aalka smith	01/08/2007	10/05/2007		
17.07.06_01_Access_HR	Job	access_hr_17.07.06_01	07/08/2006	14/11/2006		
User_01_Accessibility		accessibilityuser_01	16/10/2006	14/11/2006		
User_01_ADD		adduser	04/09/2006	29/05/2007		
User_02_Add	Job Title:	adduser_02	28/07/2006	29/05/2007		
Use_03_Add	Job Title:	adduser_03	25/01/2007	29/05/2007		
KHAN, ADEEL		Adeel Khan	04/05/2007	01/06/2007		
Ahmed, Adil's		adil123	27/03/2007	09/10/2006		
STANMORE, ADRIAN PHILIP		ADRIAN PHILIP_STANMORE_1		26/02/2007		
user_AFC_No		afcuserno		12/03/2007		
last_afc_yes		afc yes	14/07/2006	07/05/2007		
001_AM User		amuser001	21/07/2006	16/02/2007		
ardffdsdf_ardffdsdf		qazzaq	08/08/2006	08/08/2006		
patricka, Beetona		Beeton_patrick_e111	29/12/2006	04/07/2006		
Check_Bug	Job Title Job Title:	BugCheck_001	23/11/2006	16/10/2006		
user1_c		cuser1	18/12/2006	10/12/2006		
user5_c		cuser5		29/05/2007	Practice	
Scott, Charlotte		Charlotte Scott 4487		15/08/2006		

Figure 3: User Search Results

1. Clicking on the “Assign Post Outline” icon will open a search screen (See Figure 5). At this screen, you have the option to search 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.
2. 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 your organisation’s Local library, which, depending on the size of your organisation, could be many pages long.

This screen lets you define the search criteria for your Post Outline search. You may enter multiple search criteria in different fields. If you select more than one criterion, e-KSF will look for outlines that match all of the criteria. So, if you cant find the outline you are looking for, please reduce the number of criteria you enter.

You can search for All of the Post outlines, the ones posted in National Library, Local Library or outlines Shared from other organisations, by selecting the Post Outline Category. If you are looking for a post outline that contains specific dimensions, you can include the dimensions with the criteria.

You can sort your search by Post Title or Keywords. To view all of the post outlines, just click Browse

Search Criteria

Post Title: Keywords:

Created By: Approved By:

Post Outline Type: Post Outline Tracking Code:

Staff Group: Staff Title:

Post Outline Category: All National Outlines Local Outlines Shared Outlines Authority/Board Outlines

Containing Dimensions

Select	Code	Dimension Name
<input type="checkbox"/>	HWB1	PROMOTION OF HEALTH AND WELLBEING AND PREVENTION OF ADVERSE EFFECTS ON HEALTH AND WELLBEING
<input type="checkbox"/>	HWB2	ASSESSMENT AND CARE PLANNING TO MEET HEALTH AND WELLBEING NEEDS
<input type="checkbox"/>	HWB3	PROTECTION OF HEALTH AND WELLBEING
<input type="checkbox"/>	HWB4	ENABLEMENT TO ADDRESS HEALTH AND WELLBEING NEEDS
<input type="checkbox"/>	HWB5	PROVISION OF CARE TO MEET HEALTH AND WELLBEING NEEDS
<input type="checkbox"/>	HWB6	ASSESSMENT AND TREATMENT PLANNING

Search Options

Sort By: Records Per Page: (Min 5, Max 200)

Figure 5: Search Post Outline

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 type="checkbox"/>
<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"/>
<input checked="" type="checkbox"/>	abc3	e-ksf team internal use 1	New EO for Training	Keywords	firsta last			<input checked="" type="checkbox"/>
<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"/>
<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"/>
<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"/>
<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"/>
<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"/>
<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"/>
<input checked="" type="checkbox"/>	ahmad	e-ksf team internal use 1	New EO for Training	Keyword	live First Name live Last Name		Broad	<input type="checkbox"/>
<input checked="" type="checkbox"/>	ahmads	e-ksf team internal use 1	New EO for Training	12345	live First Name live Last Name		Broad	<input type="checkbox"/>
<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"/>
<input checked="" type="checkbox"/>	ahmeds	e-ksf team internal use 1	New EO for Training	Keyword	live First Name live Last Name		Practice	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Approve_Reject	e-ksf team internal use 1	New EO for Training	Approve_Reject	live First Name live Last Name			<input checked="" type="checkbox"/>

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HELP Version 6.0 Please [click here](#) for our development policy.

Figure 6: Post Outline Search Results

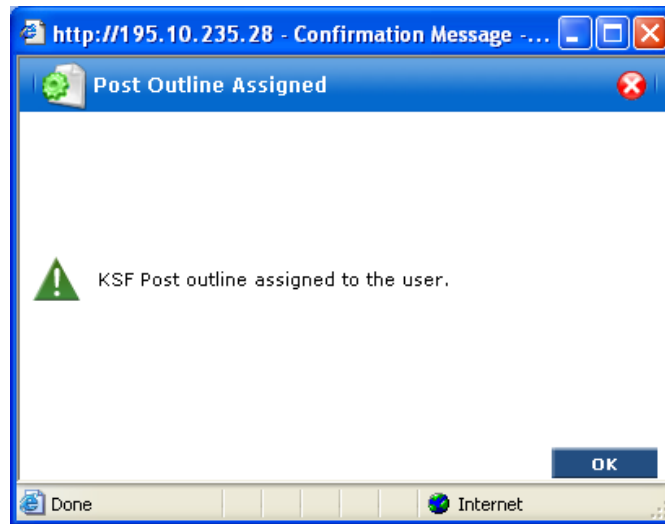
At this page, you can select the required post outline to assign it to the staff, by clicking the “Select” icon (green tick symbol) present at the last column (Highlighted in Figure 6).

As you select a post outline to be assigned to your staff member, you will be directed to a new screen, where you will be required to provide some basic information for PO (See Figure 7 below).

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:	No post outline assigned to this Staff.
Staff's Specific Post Title: *	Administrator - Staff Learning and Developm
Pay Band in Payroll System:	None
Pay Point in Payroll System:	None
Increment Date:	None
Pay Band:	Band 2 <input type="button" value="v"/>
Pay Point: *	Select one <input type="button" value="v"/>
Gateway: *	None <input type="button" value="v"/>
Increment Date: *	<input type="text"/> DD/MM/YYYY <input type="button" value="v"/>

Figure 7: Post Outline-Basic Information

All the information is mandatory here; you will need to know what ESR Assignment Number to choose from the drop down list, and which gateway to choose. The employee's pay data (pay point and incremental date) will automatically appear once you have chosen the correct Assignment number from the drop down list. If you do not have this information, you may need to contact your employee (these details should be on their pay slip), the Human Resources office, KSF lead or the e-KSF Administrator. You can also assign a staff specific job title to the Post Outline in this screen. Once done, click "Submit" button and the post outline will be assigned to that staff, replacing the existing one, according to specified information. A confirmation message will also be displayed to you as below.



Once a Post Outline has been assigned you can then reassign, archive or replace the outline. You can do this by clicking on the Post Outline icon next to the persons name as in figure 8 below. When you click on this icon a pop up will appear as in figure 9 overleaf.

Functions Available to Manage My Staff			
Name	User Type	Post Outlines	Review
Lobous, Max	<i>Practice</i>		
Bago, Winston			
Smith, Sarah		-	-
Bradbury, Practice			

Figure 8

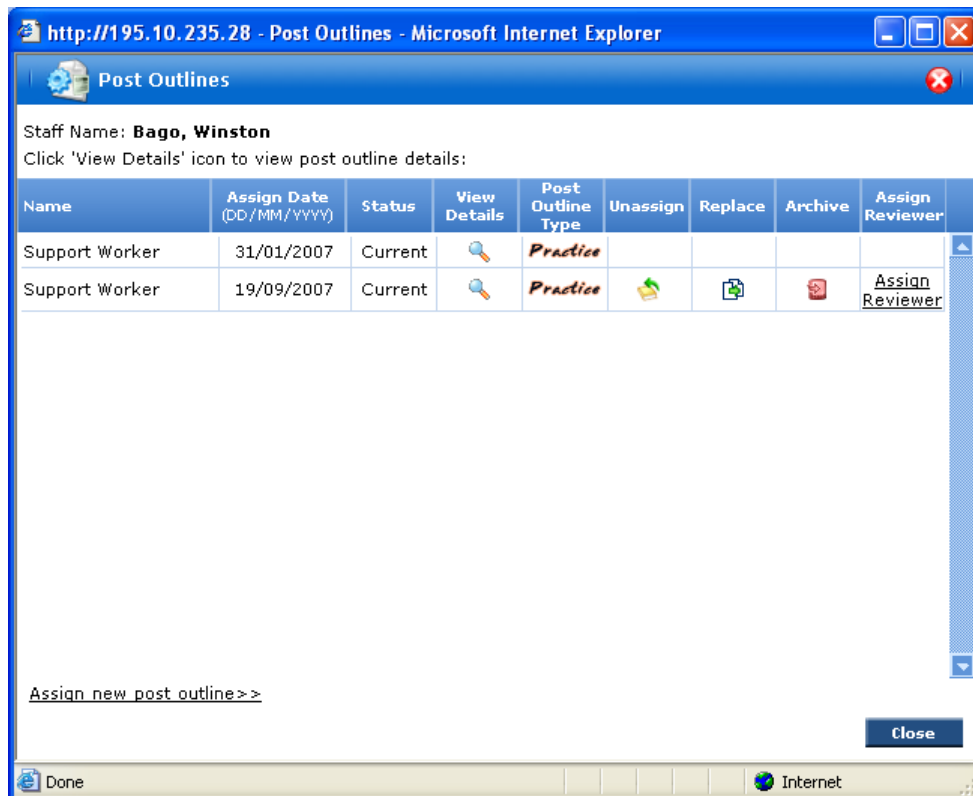


Figure 9

3. You can explicitly archive a PO. For this, click on the icon “Archive” (See figure 9). 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.
4. You can also assign a new PO to the staff. For this click on “Assign new Post Outline” link. This will take you to window shown in Figure 5. Rest of the procedure will be same as given in paragraph 3 above. Once you are done, this PO will be added in staff’s record, with status ‘Current’.
5. You can also assign a new PO in addition to an existing PO, without changing the status of existing PO. In that case 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/roles and so multiple PO.