

## **e-KSF online tool**

# **Set View Access Function of e-KSF Staff Role**

This manual explains how employees can manage any previous learning records on e-KSF, when they move to a new employment.



## Set View Access Function of e-KSF Staff Role

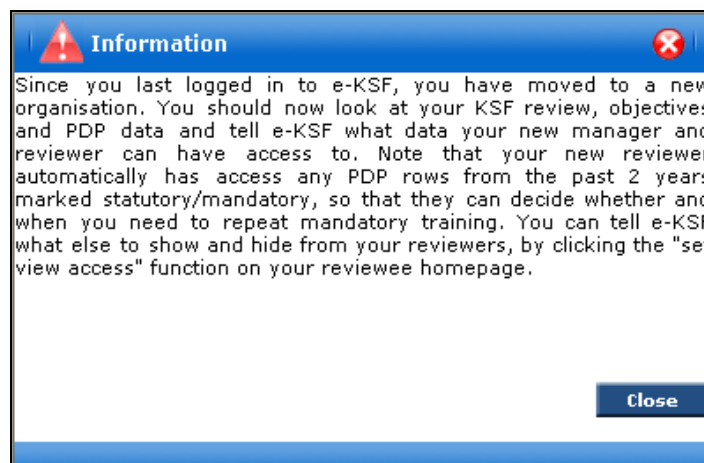
e-KSF receives employee data from payroll systems (e.g. ESR in England and Wales and SWISS in Scotland). If you previously worked in an organisation that uses e-KSF together with a payroll system, and your new organisation also uses both, then we can identify that you've moved under a process called "Inter Authority Transfer" (IAT).

*Note that is process only works within-country. Employees moving from Scotland to England/Wales, or vice versa, will still need to contact the e-KSF support team to get their records updated.*

When an employee transfers to a new organisation, employee-specific KSF data e.g. Review(s), PDP(s) and Objective(s) also automatically transfers to the new e-KSF organisation. However, **this data is not directly visible to Manager(s) and Reviewer(s) in your new organisation** until you log in to e-KSF and set relevant access, via this "set view access" process.

This guide will explain how you can grant access to your previous Review(s), Objective(s) and PDP(s) to your manager and reviewer in your new organisation. Please note that this process does not apply to post outlines. Your post outline history can be viewed by your new manager(s) and reviewer(s) at any time, because post outlines are not considered personal data.

1. The staff member, on first login after they have moved organisations via IAT sees an automatic pop-up after login:

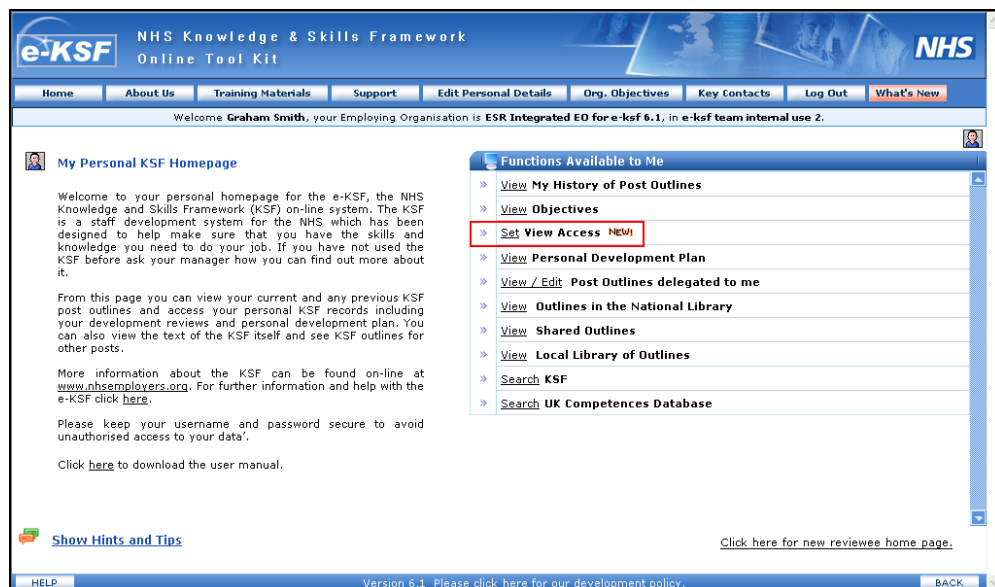


2. User has new option visible – **Set view access** (highlighted in red in figure below) on his/her staff homepage.



This function is visible only for staff that have moved organisations on e-KSF, where both old and new organisations have linked either ESR (in England and Wales), or SWISS (in Scotland), to e-KSF.

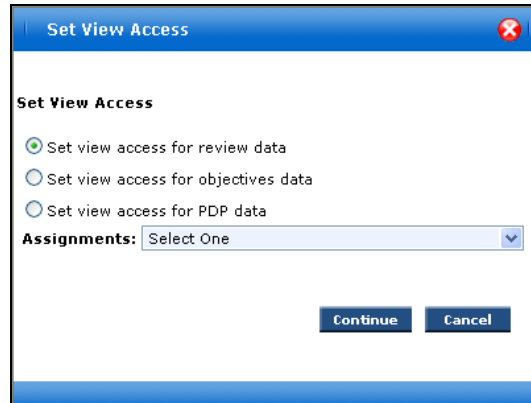
This is what the staff homepage looks like once you've clicked the "show classic view" link at the bottom-right corner of the screen



3. Click the link highlighted in red in the above figure, and a pop-up is displayed with the following options to select from:

- Set view access for review data
- Set view access for objectives data
- Set view access for PDP data

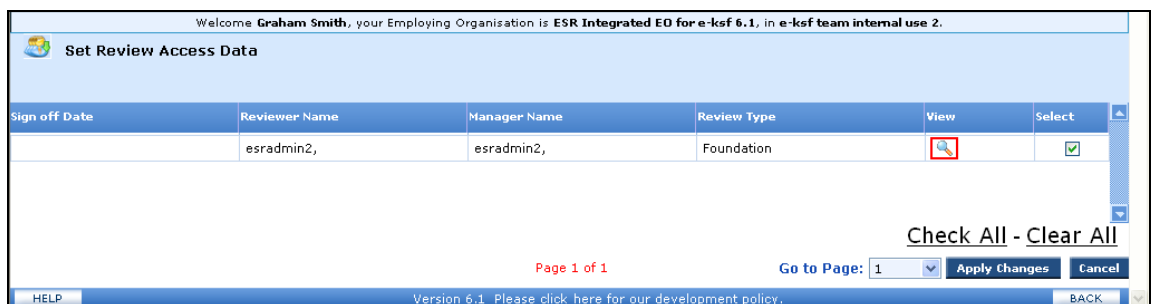
This is what the pop up looks like:











A drop-down list to select post outline name is used to cope with situations where you've had multiple post outlines in the old organisation.

4. Set view access for review data:
  - a. e-KSF displays a list of reviews associated with the post outline for which the selected reviewer is also associated (sorted by date oldest first):
    - Sign-off Date** – Sign off date of the review
    - Reviewer Name** - Name of reviewer who signed off this review
    - Manager Name:** Manager associated with that post of employee
    - Review Type** – Can be any (foundation, second, normal review)
  - b. Select check-boxes against each row to set access rights. And tell e-KSF that your new reviewer can view this information.

(Some of these check-boxes may already be selected, if you have already been through this process once – i.e. you can change the view access over time).



- c. You can click on  (highlighted in red in above figure) to see a read-only version of the review document as shown below:

No.	Dimension Name	Dimension Type	Foundation Outline Level	Full Outline Level	Current Level	Evidence
C1	COMMUNICATION	Work Related	1	4	1	
C2	PERSONAL AND PEOPLE DEVELOPMENT	Work Related	1	4	1	
C3	HEALTH, SAFETY AND SECURITY	Work Related	1	4	1	
C4	SERVICE IMPROVEMENT	Work Related	1	4	1	
C5	QUALITY	Work Related	1	4	1	
C6	EQUALITY AND DIVERSITY	Work Related	1	4	1	
C7	Test	Work Related	1	1	1	

Personal Development Review Sign-off

Reviewer sign-off  Yes  Pending

Individual sign-off  Yes  Pending

Print Detail Cancel

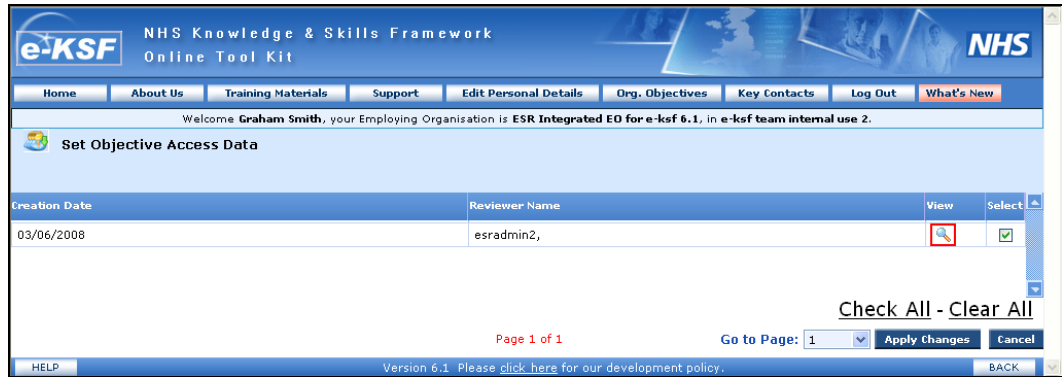
Version 6.1 Please [click here](#) for our development policy.

- d. On **Set Review Access** page you can **Select** appropriate check-boxes and click **Apply Changes** or **Cancel** to return to homepage. If you click **Apply Changes** e-KSF changes view settings to allow the manager(s) and reviewer(s) to view the details of the selected reviews in read only form.
5. Set view access for objectives data:
- a. e-KSF displays a list of objectives associated with the post outline selected, showing the following, sorted by date oldest first:

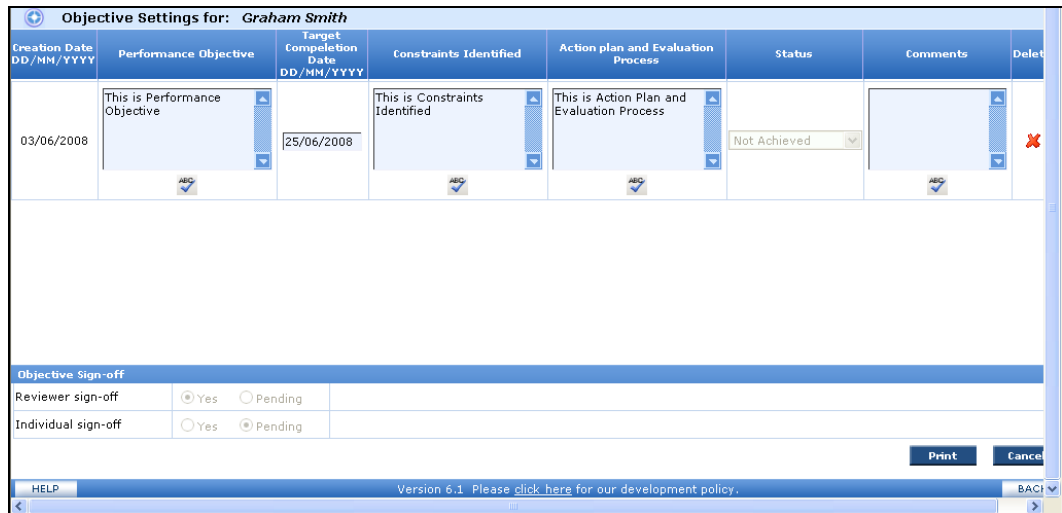
**Creation Date:** Objective creation date

**Reviewer Name** - Name of reviewer who signed off this objectives document

(Some of these check-boxes may already be selected, if you have already been through this process once – i.e. a staff member can change the view access over time).



b. You can click to see a read-only version of the document as shown below:



c. On **Set Objective Access** page you can **Select** check-boxes and then click **Apply Changes** or **Cancel** to return to homepage. If **Apply Changes** is selected, e-KSF changes view settings to allow the new reviewer(s) to view the details of the selected objectives in read only form.

6. Set view access for PDP data:

a. e-KSF displays a list of PDPs associated with a particular post outline, showing the following summary data:



If Assignment is not selected then PDPs associated with all post outlines are displayed.

**Activity:** Title of the activity

**Linked Activity Title:** Title of the linked activity (if any)

**Reviewer Name:** Name of the respective reviewer

**Target Date for Completion :** Target date for completion of Activity (if any)

**Status** - (editable, pending, agreed, completed)

**Completion Date** - (if status = completed)

(Some of these check-boxes may be already selected, if you have already been through this process once – i.e. a staff member can change the view access over time).

*Some check-boxes may be auto-checked and greyed-out (so user can not change them) where the PDP activity is statutory/ mandatory. Such activities will always be visible to manager and reviewer of the employee in new organisation.*

The screenshot shows the NHS Knowledge & Skills Framework Online Tool Kit interface. The page title is "Set PDP Access Data". Below the title is a table with the following columns: Activity, Linked Activity Title, Reviewer Name, Target Date for Completion, Status, Completion Date, View, and Select. The table contains one row with the following data: Activity: "This is Activity", Linked Activity Title: (empty), Reviewer Name: "esradmin2,", Target Date for Completion: "25/06/2008", Status: "Pending", Completion Date: (empty), View: (empty), and Select: (checked). Below the table are buttons for "Check All - Clear All", "Go to Page: 1", "Apply Changes", and "Cancel". The footer of the page includes "HELP", "Version 6.1 Please click here for our development policy.", and "BACK".

Activity	Linked Activity Title	Reviewer Name	Target Date for Completion	Status	Completion Date	View	Select
This is Activity		esradmin2,	25/06/2008	Pending			<input checked="" type="checkbox"/>

- b. Click to see a read-only version of the PDP document as below:

Personal Development Plan For: *Graham Smith*

Link Activity to Database	Creation Date (DD/MM/YYYY)	Target Completion Date (DD/MM/YYYY)	Learning Aim/Purpose	Activity (What will I do)	Priority	Click for More Details	Linked Dimensions	Status	Reviewer	Staff	Delets
Link Activity	03/06/2008	25/06/2008	This is Learning	This is Activity	Desirable for indivi	More Details View / Upload Files	View Linked Dimensions	Pending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Print Summary Print Detail Cancel

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- c. On **Set PDP Access** page you can **Select** check-boxes and then click **Apply Changes** or **Cancel** to return to homepage. If **Apply Changes** is selected, e-KSF changes view settings to allow the new reviewer to view the details of the selected PDPs in read only form.