



## e-KSF VERSION 6.2.2 RELEASE NOTES

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**Distribution:** Public

This document describes the changes that are planned for the version 6.2.2 release to e-KSF on 22<sup>nd</sup> June 2009. All of these changes are minor fixes and improvements to usability, and should not require any re-training of users, or new materials creation. This document contains an index of changes, and then screenshots to describe the key changes in more detail.

<b>Change Reference</b> <small>(gaps in the sequence of reference numbers below are intentional – some items are for our internal reference only).</small>	<b>Summary of Change</b>	<b>Description</b>
6.2.2/05	Addition of reminder email to reviewers and reviewees to conduct an individuals' Personal Development Review, prior to an individuals increment date.	e-KSF Administrators can define how many weeks in advance of an individuals increment date they and their reviewers and / or managers are emailed to remind them to conduct a Personal Development Review. Who receives the email can be specified within the global email alerts area.
6.2.2/10	Addition of multiple levels within reports to allow managers to see up to 10 levels of staff hierarchy underneath them.	Within the reports available to managers on the e-KSF then individuals will now be able to see up to 10 levels of staff underneath them.
6.2.2/12	Addition of new report showing the detailed summary of reviews by employee within Monitoring Reports.	We have created a new report (report reference MR-09) that allows e-KSF administrators to see a detailed summary of reviews by employee along with their assignment references and departmental structures.
6.2.2/16	Addition of 'warning prompt' to e-KSF administrators when editing individual records received from ESR	<p>If an e-KSF administrator edits or deletes an individuals' ESR Employee Number using the 'Edit Global User' function this removes the associated assignment mapping information.</p> <p>Within the new release if an e-KSF administrator does opt to edit or delete an individuals' ESR Employee Number, they will be shown a warning within a pop up window to confirm that the individual assignment mapping information will be lost if they continue with the amendment / deletion.</p>
6.2.2/17	Amend to Managers Report - KSF Review Progress.	Within the report 'KSF Review Progress' accessible to managers, we have added the



<b>Change Reference</b> (gaps in the sequence of reference numbers below are intentional – some items are for our internal reference only).	<b>Summary of Change</b>	<b>Description</b>
		'Actual Review Date' to the report template as opposed to the 'sign off date of the review.
6.2.2/04	Amendments to the KSF Monitoring Report – Summary of Reviews, Objectives and PDP by Employee Name, (report reference (MR-07)) and Managers Report Summary of Reviews, Objectives and PDP by Employee Name.	In the Summary of Reviews, Objectives and PDP report (MR-07) accessible to e-KSF Administrators and the report of the same name accessible to Managers. The following option has been added: <ul style="list-style-type: none"> <li>• 'Filter records by 'from' and 'to' date.</li> </ul> In addition to this the following change has been made to the figures shown within the report: <ul style="list-style-type: none"> <li>• Only records which have both manager and staff sign-off boxes ticked will be shown – irrespective of what appears in the status drop-down. (This has the effect of picking up both agreed and completed records).</li> <li>• Total number of records, will be visible on the first page of the report.</li> </ul>
	Amendments to the Post Outline Report – "Outline and Review Progress totals (Organisation-wise)"	In the "Outline and Review Progress Totals (Organisation-wise)" report (accessible to SHA level administrators) the following option has been added: <ul style="list-style-type: none"> <li>• The ability to filter records by "from" and "to" date.</li> </ul> In addition to this the following changes have been made to the figures shown within the report: <ul style="list-style-type: none"> <li>• Only records which have both manager and staff sign-off boxes ticked will be shown – irrespective of what appears in the status drop-down. (This has the effect of picking up both agreed and completed records).</li> <li>• The report will now show the 'number of signed off Personal Development Reviews, per employment' not "number of completed reviews".</li> </ul>



**Screenshots and, where necessary, brief instructions for use**

Change reference (gaps in the sequence of reference numbers below are intentional – some items are for our internal reference only)	Summary of change	Screenshot/instructions for use
6.2.2/05	Addition of reminder email to reviewers and reviewees to conduct an individuals' Personal Development Review, prior to an individual's increment date.	The function is accessible from Employing Organisation Administrator's home page via "Define Global Email Alerts" as shown in Fig 2. On clicking the Edit icon Admin can configure its settings as in Fig 2.1

Email Alerts		
Email Title	Edit	Active
e-KSF Short Term Action Plan is now signed off		<input checked="" type="checkbox"/>
e-KSF Short Term Action Plan - Your sign off is required - Staff		<input checked="" type="checkbox"/>
Pay Point Assignment		<input checked="" type="checkbox"/>
Welcome to e-KSF!		<input checked="" type="checkbox"/>
Reminder Email to Record Personal Development Review on e-KSF		<input checked="" type="checkbox"/>

Fig 2

**Global Email Alerts**

Email Audience:  e-KSF Admin  Manager  Reviewer  Staff

Admin User Roles:  Full Admin Access

CC Email:

Email Title: \* Reminder Email to Record Personal Development Review on e-KSF (Maximum 100 characters)

Email Subject: \* e-KSF online tool – Reminder to start the personal development review (Maximum 300 characters)

Reminder Days: \* 5

Merge Fields: Select One

Email Text: \*  
 Hi <<Staff Name>>, <<Manager Name>>,  
 It is to inform you that you are nearing the increment date, <<Increment Date>>, set on the e-KSF online tool for the post <<Post Outline>>. You are kindly requested to start the Personal Development Review Process in partnership.  
 Please ignore this reminder if you have already started this process on the e-KSF online tool.  
 Regards,  
 Thank you,

Fig 2.1

6.2.2/12	Addition of new report showing the detailed summary of reviews by employee within Monitoring Reports.	This Report is accessible from Employing Organisation Administrator's home page via "View Reports" in the "Monitoring Section" as in Fig 3.
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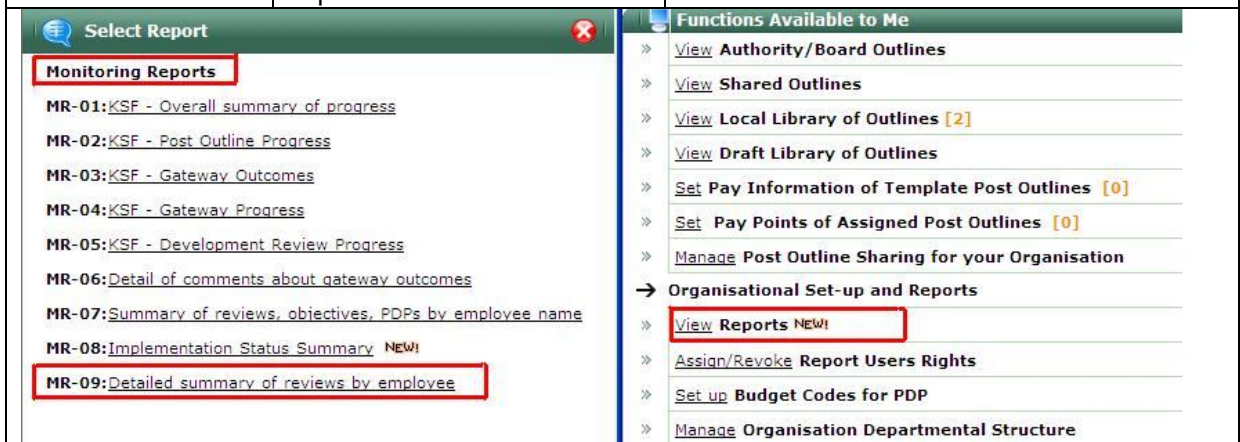


Fig 3

6.2.2/16	Addition of 'warning prompt' to e-KSF administrators who opt to delete an individual's ESR Employee Number.	While Editing User details if an individual is Mapped with ESR and Employing Organisation Administrator want to remove that mapping (i.e. remove ESR Employee Number) a warning message will appear as shown in Fig 4
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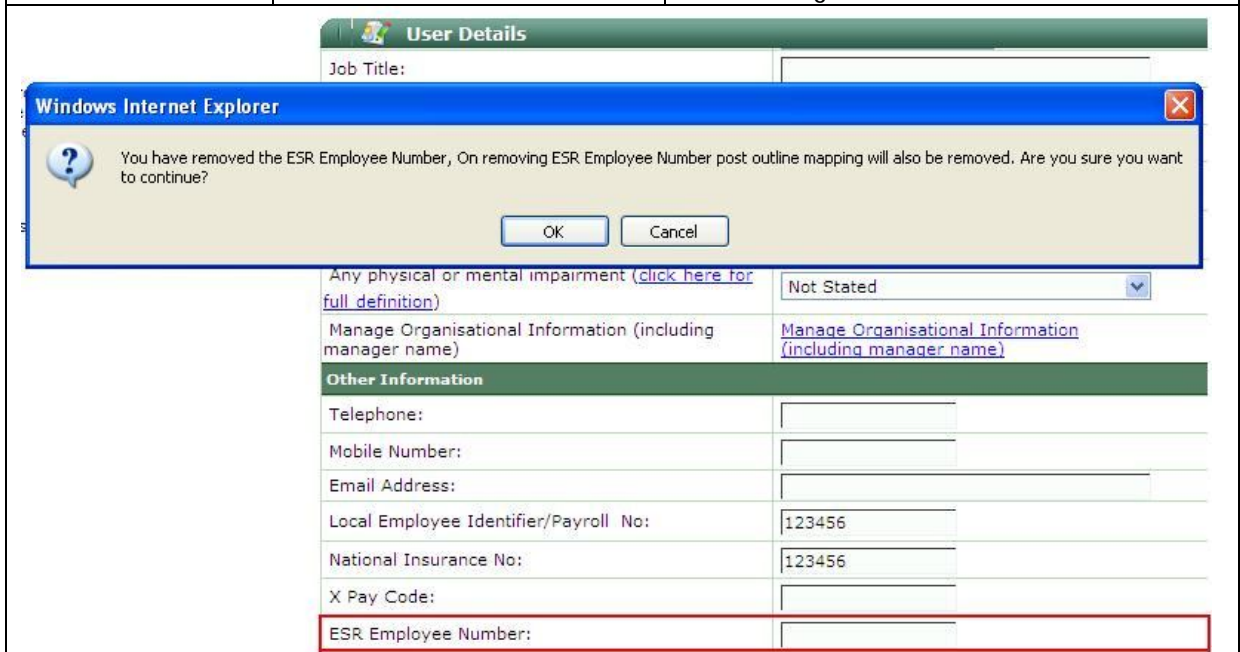


Fig 4

6.2.2/04	Amendments to the KSF Monitoring Report – Summary of Reviews, Objectives and PDP by Employee Name, (report reference (MR-07)) and Managers Report Summary of Reviews, Objectives and PDP by Employee Name.	<ul style="list-style-type: none"> <li>• Filter records by 'from' and 'to' date as in Fig 5</li> <li>• Total number of records on the first page of the report as in Fig 5.1</li> </ul>
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Summary of Reviews, Objectives, PDPs by Employee Name
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Please select a filter criteria

**Tier1 Department :**

**Manager name :**

**Has logged in to e-KSF :**

**Post Outline Assigned:**

**Include Admin Entered Data:**

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**From Date:**

**To Date:**

**Review Signed Off:**

**Objectives Signed Off:**

**PDP Activity Agreed:**

Fig 5

Summary of Reviews, Objectives and PDPs by Employee Name											
<small>Employing Organisation Name: HPW Enabled Trust Testing</small>											
<small>This report gives you a quick overview of how staff are progressing through the KSF process, including who has got a post outline assigned, KSF review completed or development activities planned.</small>											
<small>Department tier1: All</small>											
<small>From Date: 13/05/2009 To Date: 13/05/2009</small>											
<small>Manager: All</small>											<small>Total Records: 4</small>
<small>Has Logged into e-KSF: Both Post Outline Assigned: Both Objectives Signed Off: Both Review Signed Off: Both PDP Activities Agreed: Both</small>											
<small>Note: This report is sorted by Department Tier 1 then Manager Last name, then by Employee Last Name</small>											
Sr No	Department Name	Manager Name	Staff Name	Assigned Post Outline Name	Has Logged In to e-KSF	Post Outline Assigned	Objectives Signed Off	Review Signed Off	PDP Activity Agreed	Employee Identifier	

Fig 5.1