Guide to your Manager homepage

Your Manager homepage has various different options/icons to select and the purpose of this guide is to explain what each of these is for. When you open your Manager homepage you will see the following window:

The buttons highlighted above always appear at the top of the screen no matter which option you select within your Manager homepage. The buttons that are relevant to you are described below:

- **Home** – this button does as it says and will return you to your Manager homepage at anytime if you become unsure as to how to proceed.

- **Edit Personal Details** – clicking on this button opens a window where you can change your password, update your login name or reset your secret question and answer.

- **Org. objectives** – this button opens a window that details the objectives for your organisation. Please note that objectives will only show if they have been populated by your e-KSF Administrator.

- **Key contacts** – this window shows the contact details for your local e-KSF Administrator(s). Their details show under ‘Employing Organisation Admin’.

- **Log out** – when you wish to exit from e-KSF you would click on this button.
The ‘Functions Available to Me’ section on your Manager homepage allows you access to:

- creating post outlines
- post outline libraries
- any draft post outlines that you are working on
- assigning reviewers to multiple staff
- assigning post outlines to your staff individually or to multiple staff
- unassigning post outlines that have been assigned by mistake
- giving staff reviewer rights i.e. so that they will have the Reviewer icon in e-KSF
- reports
- assigning/revoking rights to edit draft post outlines in your draft library before you submit them for approval
- viewing/editing any draft post outlines that have been delegated to you by another user for you to review before it is submitted for approval
- delegating your access to a secretary (if applicable at your Board)

In addition to the above there are also options available to you in the ‘Functions Available to Manage My Staff’ section (as shown below), to manage the KSF processes for your staff. Please note that if no post outline has been assigned to a staff member there will be no icons showing next to their name.

<table>
<thead>
<tr>
<th>Name</th>
<th>User Type</th>
<th>Post Outline</th>
<th>Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campbell, Callum</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each function is explained below:

- **Name**: details the name of the staff member.
- **User type**: the word ‘Practice’ may appear in this box if you have been assigned a practice user account for training purposes.
- **Post Outline**: clicking on this icon opens up a separate window which shows the post outline history for the staff member and the option to assign a reviewer to the staff member on an individual basis.
- **Review**: clicking on this icon opens up a separate window which gives you ‘view only’ access to the review documents for a staff member. You can open the review document but the only update that you can make is to add a comment using the ‘Manager comment’ link.

Some ‘hints and tips’ for using e-KSF are shown on the next page.
Hints and tips

- e-KSF is a database that can be accessed anywhere that an internet connection is available. It can only be accessed using Internet Explorer.

- When you are assigning a post outline to a group of staff using the ‘Assign Post Outlines to Multiple Staff’ option then you can enter a wildcard (‘%’) into the search box for first name and this will list the details of all your staff instead of having to search for each individual person.

- No matter what level of access you have for e-KSF if there is any underlined text showing on the screen you can click on this and it is a link to further information. For example the link to a review or objectives document is underlined.

- If any updates are made to e-KSF you can click on the pink ‘What’s new’ button at the top of your screen and this will list the details of the updates made.

- The ‘Edit Personal details’ button at the top of your screen opens a pop up window which allows you to view your personal information that has been received from SWISS; you can update your email address and phone numbers; you can reset your secret question and answer plus your login name; you can also change your password through this window.

Your local e-KSF Administrator will be able to provide you with further information on using the options available on your Manager homepage.