

NOS Database User Guide for SSC/Os

Version 1 August 2011

NOS Document Maintenance (Admin) Site

The main admin site is where all of the NOS publication and approval work is done. To access the site go to:

www.ukstandards.co.uk/admin

Prior to your initial use, you will need to request a login to be set up via nos@ukces.org.uk

Welcome Page

This is the main welcome page that SSC/Os will see. SSC/Os will see the list of projects under review for their own organisation.

The screenshot displays the NOS Document Maintenance Admin Site dashboard. At the top, there is a navigation bar with the NOS logo and links for Home, About NOS, Search, Help, Contacts, and Cymraeg. The user is logged in as Jenny Barber. A large blue banner reads "Welcome to the NOS Document Maintenance Site". Below this, there is a "NOS QA PROCESS" diagram showing the following steps: Pre-Development Activity, Part A Submission & Sign off, Draft NOS submission Feedback & sign off, Part B & NOS Checklist Submission & sign off, and Final NOS Submission & Approval. A central section titled "Here are the list of projects currently under review/development" includes a "New Item" button and filter options for "Include" (Part A, Part B, Checklist, NOS, Welsh NOS) and "Exclude" (Completed, Welsh Documents Completed). A legend indicates status colors: grey for "Awaiting Other Form(s)", yellow for "Awaiting Submission", cyan for "Awaiting Review", and green for "Approved". At the bottom, a flowchart shows the progression for "Anti-money laundering" and "Compliance" through Part A, Part B, Checklist, NOS, and Welsh NOS stages.

Dashboard - List of projects currently under review/development panel

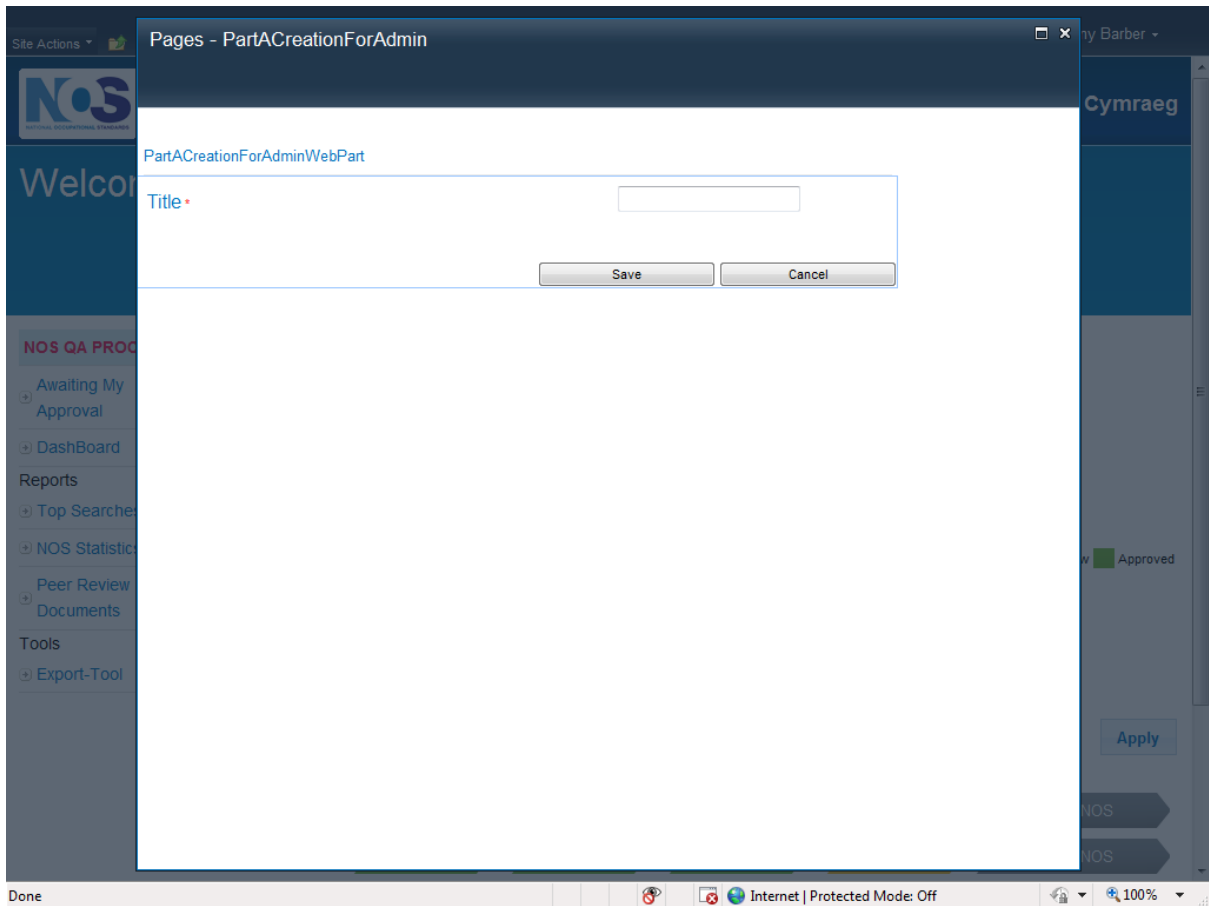
This will show all the projects that the user's organisation is currently reviewing or developing, along with a status/colour code for each section to indicate the current position of each project within the review process. There is also a filter that will allow the user to filter the list and only show projects according to which sections have work outstanding.

This list is also available by clicking the Dashboard link in the left navigation panel.

New Project/Part A

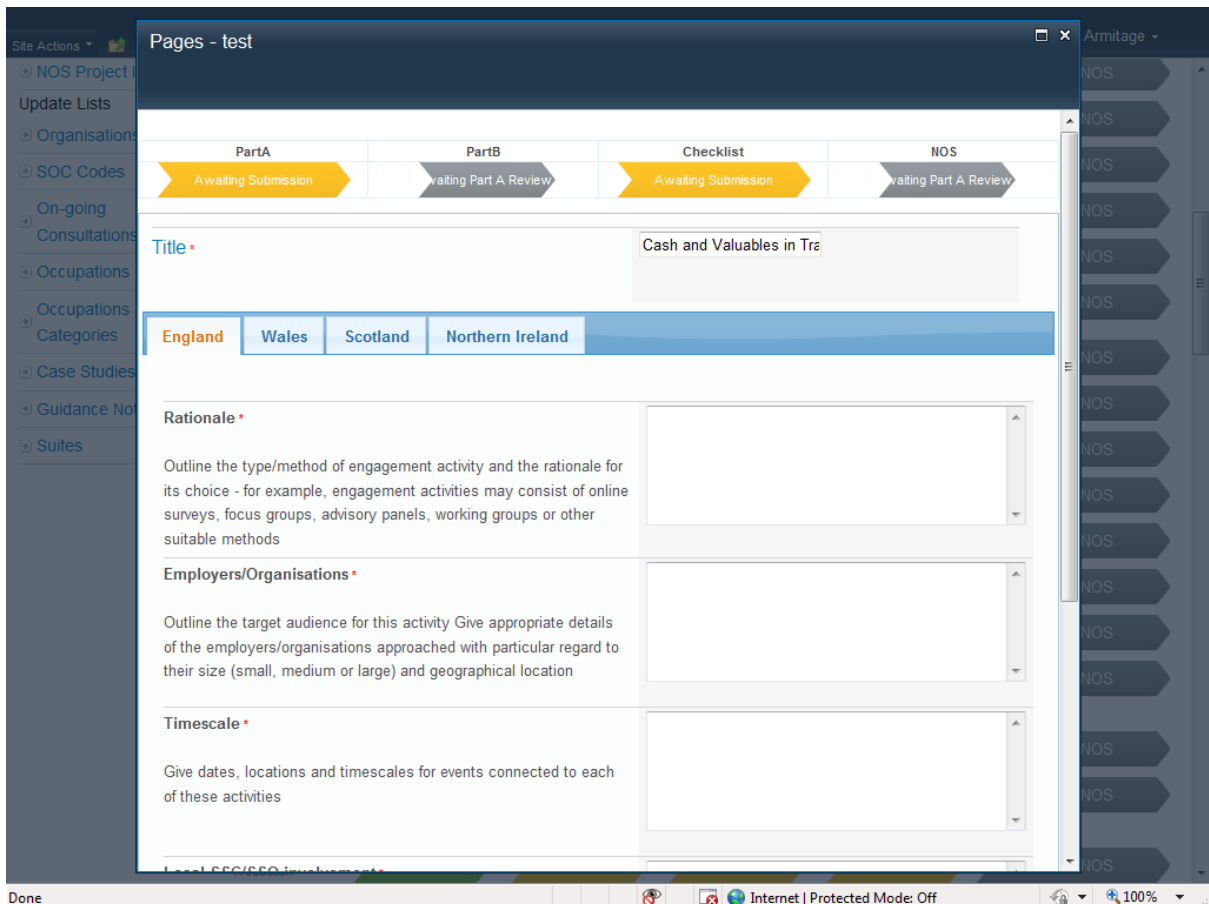
To start a new project click New Item on the Dashboard page (see above screenshot).

SSC/Os will be presented with the following screen, allowing them to input the title of the project. Projects will automatically be allocated to their SSC/O.



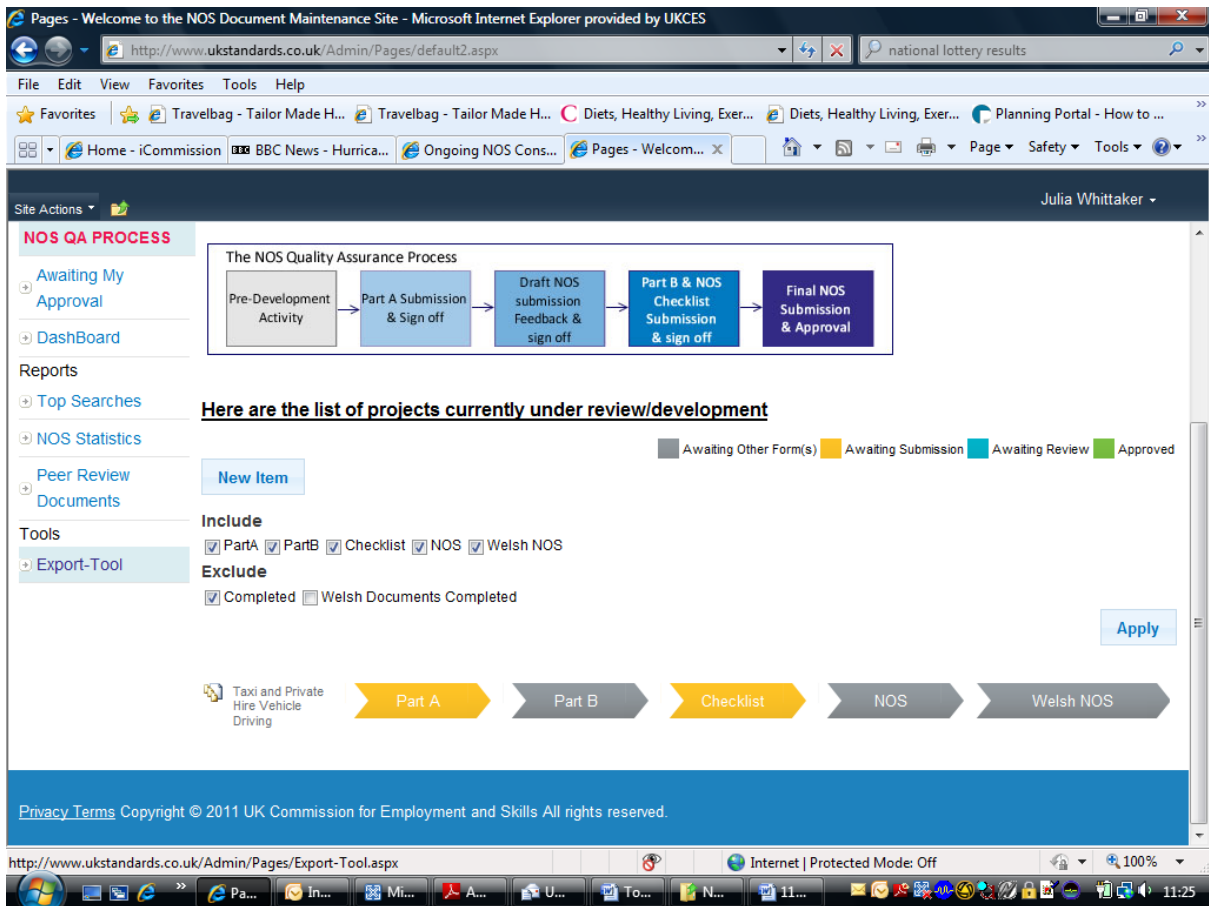
SSC/Os need to input the title of the project and click Save

All users will then be presented with:



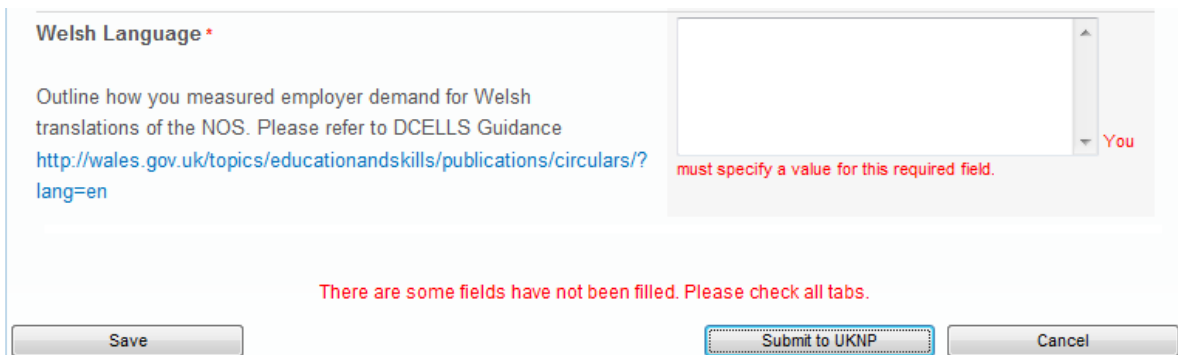
Simply complete each section on each Nation Tab page. All sections are mandatory.

You are able to save as you go by clicking the Save button. This will save the details entered so far, and allow you to come back later and complete the rest of the sections. The saved project will now appear on the Dashboard page. Once a Part A has been started and saved, you are now able to start populating the QA Checklist (indicated by the Awaiting Submission status/yellow link colour).



Clicking on the Part A link in that view will open the Part A, complete with previously saved information.

Finish completing information on all four nation tabs and click Submit to UKNP. Any errors will be highlighted, and will need to be rectified before submission is permitted.



An error below an answer box indicates that field needs to be completed before submitting.

Check each tab for error messages and correct as necessary and re-submit.

Once submitted the Part A will appear on the Dashboard page, coloured blue indicating it has been Submitted and is Awaiting Review.

During approval, as each nation Panel approves or rejects the submission, all members with a login for your SSC/O will receive an email notification stating whether it has been approved or rejected.

If the Part A is returned by the Panel, you will be able to access the Part A form to view their comments. You can reply to their comments by clicking the reply button, as well as modifying the submitted information.

Created	Group	ModifiedBy	Approval Status	Comment
2/11/2011 4:03:07 PM	England	Gareth Ashby	Approved	Approved

[Reply](#)

Once the Part A is fully approved by all 4 nations, the Dashboard section will be updated, and you are able to uploading draft NOS documents, when you are ready.

The screenshot shows a web browser window displaying the NOS Document Maintenance Site. The page title is "Welcome to the NOS Document Maintenance Site - Microsoft Internet Explorer provided by UKCES". The URL is "http://www.ukstandards.co.uk/Admin/Pages/default2.aspx". The user is logged in as "Jenny Smith".

The dashboard includes a "Reports" section with a "Top Searches" link and a "NOS Statistics" section. A "Peer Review Documents" section has a "New Item" button. The "Tools" section includes "Part A", "Part B", "Checklist", "NOS", and "Welsh NOS" options, with checkboxes for "Include" and "Exclude".

The main content area displays a list of projects currently under review/development. The projects are:

- Fencing
- Land-based Machinery Industry Operations
- Tree Work

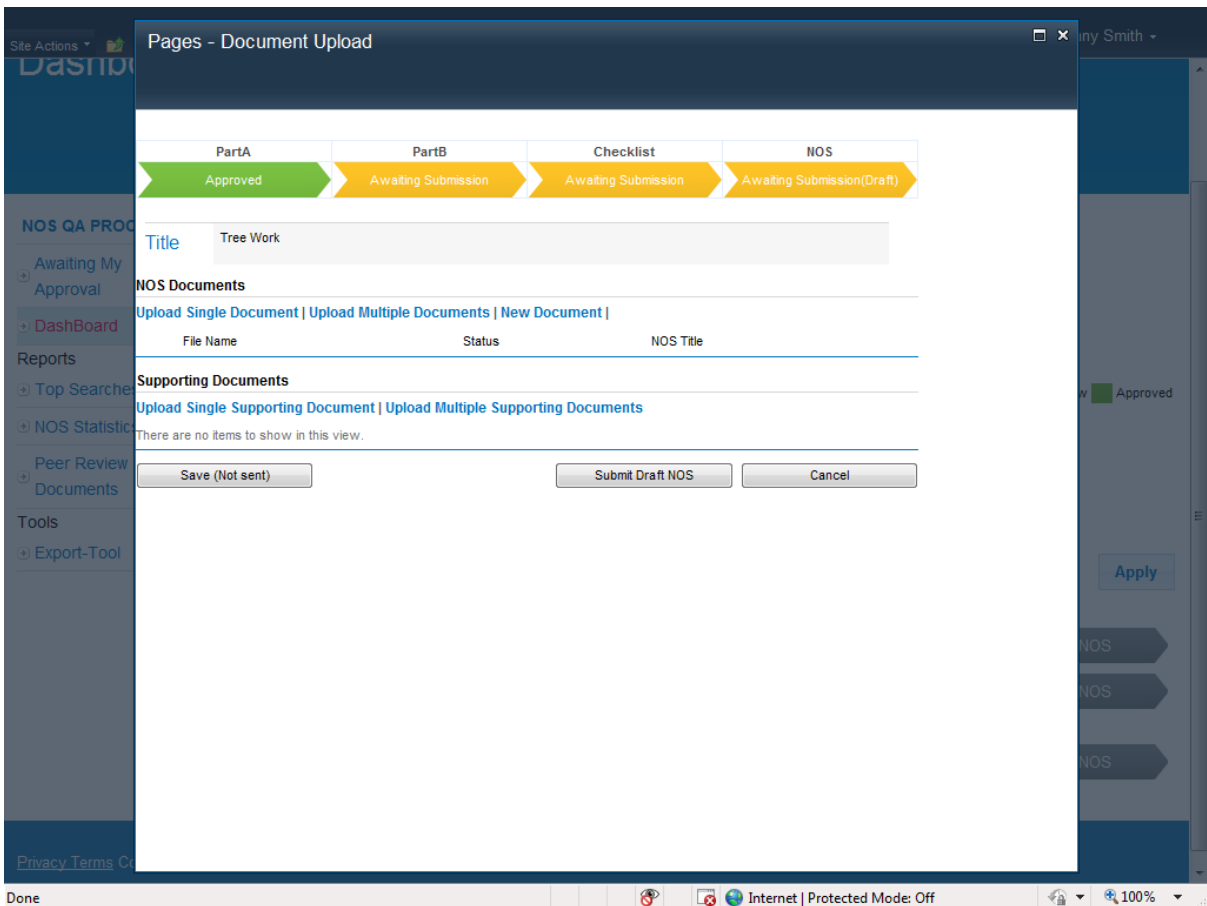
Each project has a row of colored buttons representing different stages: Part A (green), Part B (yellow), Checklist (orange), NOS (blue), and Welsh NOS (grey). The "NOS" button for each project is highlighted in blue, indicating it is the current stage.

At the bottom of the page, there is a footer with "Privacy Terms" and "Copyright © 2011 UK Commission for Employment and Skills All rights reserved."

When the Part A is viewed again, it will show all the information as read only, and will contain a list of the comments submitted by the Panel during the Approval process.

Uploading Draft NOS

To upload Draft NOS, the SSC/O clicks the NOS (awaiting submission draft/yellow) tab on the Dashboard page.

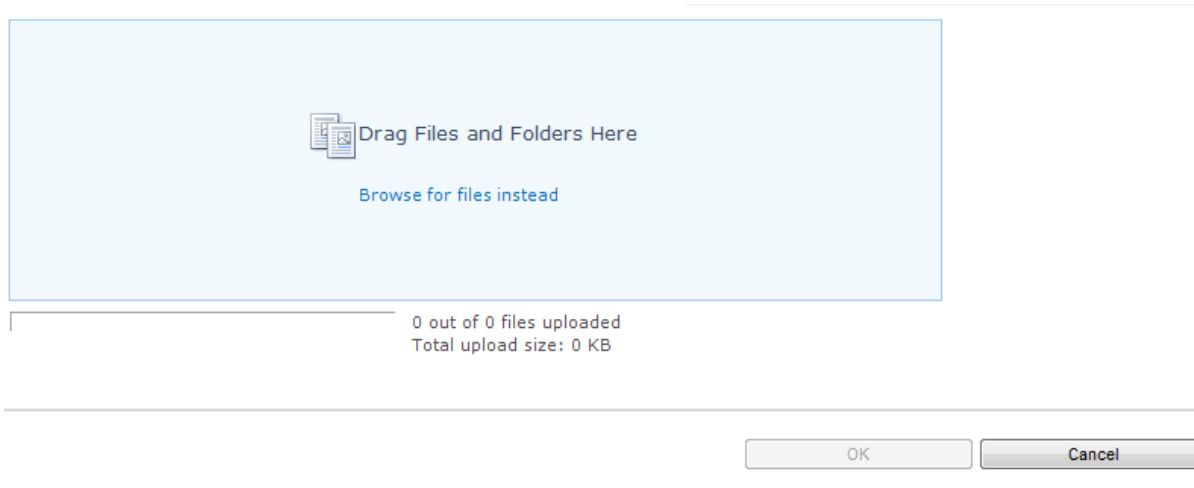


This page has two sections – NOS documents and Supporting Documents.

There are three ways to upload documents to the system – either load a blank NOS Template and complete online, or upload single or multiple completed documents.

To start a blank template and complete online, click the New Document link. This will load the blank DOCX template for you to complete. Once completed, click save within the document to save the document to the window.

To upload single or multiple documents, click the relevant Upload Documents link to be presented with the Upload screen.



Depending on the version of Windows and Internet Explorer you are using, you will be presented either with the Drag and Drop window as shown, or a Windows Explorer style window. With the Drag and Drop window simply browse to the required NOS documents in either DOCX format or an XML file that conforms to the required schema, and drag them to the Drag and Drop window. Once all the documents have been added to the window, click Done to return to the main Upload Screen.

These documents must be in the correct version of the NOS docx template. All NOS documents should have the full URN only as the title eg ASTFM14. For details of how to populate the NOS template, please refer to the NOS Template Guidance and examples available at: <http://www.ukstandards.co.uk/help/Pages/Guidance-Notes.aspx>

Please note you only need to submit new or revised NOS for approval. Please see the section on Final NOS for the process for imported NOS.

Any incompatible file formats will be indicated within the screen. These files will not be uploaded to the system and should either be re-uploaded in the correct format.

The system will attempt to get all the metadata from the document and add to the relevant metadata fields for the document. If this is successful you will see an OK message next to the document within the upload screen. You do not need to edit the metadata for the document unless you wish to add additional metadata to it

Addressing missing values

If metadata is needed, most likely because the system couldn't get the data from the document, a message will appear indicating missing values and you need to edit the metadata.

To adjust the metadata on a document click the Edit link. This will load the metadata window and show you all of the metadata available for that document. Simply change the data for the required field and press save. Any mandatory fields are marked with a red asterisk (*).

Please note that Suites and Relevant Occupations are pre-populated pick lists, so this information in your NOS documents needs to match the existing items in the lists. If you require items to be added to these lists, please request this via nos@ukces.org.uk prior to uploading your draft NOS.

Peer Review

From the metadata page, you are able to mark up NOS for peer review. By checking the box next to peer review in the metadata for each individual NOS, this will enable log in users (SSC/Os and Panel members) to be able to view these NOS. This functionality has been added at the request of SSC/Os to enable other SSC/Os to view their NOS and to send comments to the originating SSC/O separately via e mail. Please note that you will need to separately inform specific SSC/Os that you have done this to alert them.

Uploading Supporting Documents

This includes status of NOS lists and support for imported and tailored NOS. Any file type can be uploaded, and documents must be completed on your own system prior to upload.

Draft NOS Submission

Once all the NOS documents have been uploaded and their metadata completed, they are ready for submission for approval as draft NOS. Click the Submit Draft NOS button to submit them for draft approval. Once submitted you will not be able to edit the metadata or the documents until England and Scotland Panel members have either approved or rejected the NOS.

England and Scotland Panel members will review the NOS and supporting documents submitted, along with their metadata, and you will receive an email notification when they have either approved or rejected the document(s), along with any comments made. If the NOS are rejected then you will need to make any amendments necessary and resubmit as Draft NOS.

Checklist

Once Part A is approved, you can start to populate the checklist but you should only submit the completed checklist alongside Part B.

The Checklist is accessed from the Dashboard page.

PartA	PartB	Checklist	Documents
Approved	Awaiting Submission	Awaiting Submission	Awaiting Submission(Draft)

Title

Demo Test

SSC Producer - How have you ensured that you have met the NOS Quality Criteria in relation to Functional Analysis (refer to Section 3 of the NOS Quality Criteria)? *

SSC Producer - How have you ensured that you have met the NOS Quality Criteria in relation to the Identification of existing NOS and common functions (refer to Section 4 of the NOS Quality Criteria)? *

SSC - How have you ensured that you have met the NOS Quality Criteria in relation to the Specification of NOS (refer to Section 5 of the NOS Quality Criteria for the detail of each component)? *

SSC - Does each NOS have a unique, concise title which clearly and accurately describes the function and enables the NOS to be used outside the sector if appropriate? (5.5) *

SSC - UK wide standards: In what ways have you ensured that you have systematically collected, managed and used feedback on the NOS to ensure they can be used across the UK, and that consultation has taken place across a representative sample of employers in each nation across the UK? (5.17) *

How have you ensured that you have met the NOS Quality Criteria in relation to the Importing and Tailoring of NOS (refer to Section 6 of the NOS Quality Criteria) *

Tailoring NOS: In what ways have you ensured that there is a clear rationale and a critical need to tailor NOS? (6.2) *

Save

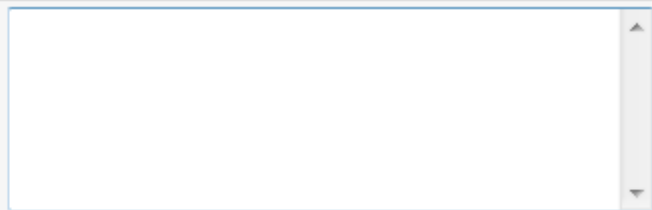
Internal Submission

Cancel

Populate all sections of the Checklist.

Click Save to save your progress so far, and complete later. Click Submit once you have answered all questions to submit the form for internal QA checking, correcting any errors found if necessary.

Tailoring NOS: In what ways have you ensured that there is a clear rationale and a critical need to tailor NOS? (6.2) *

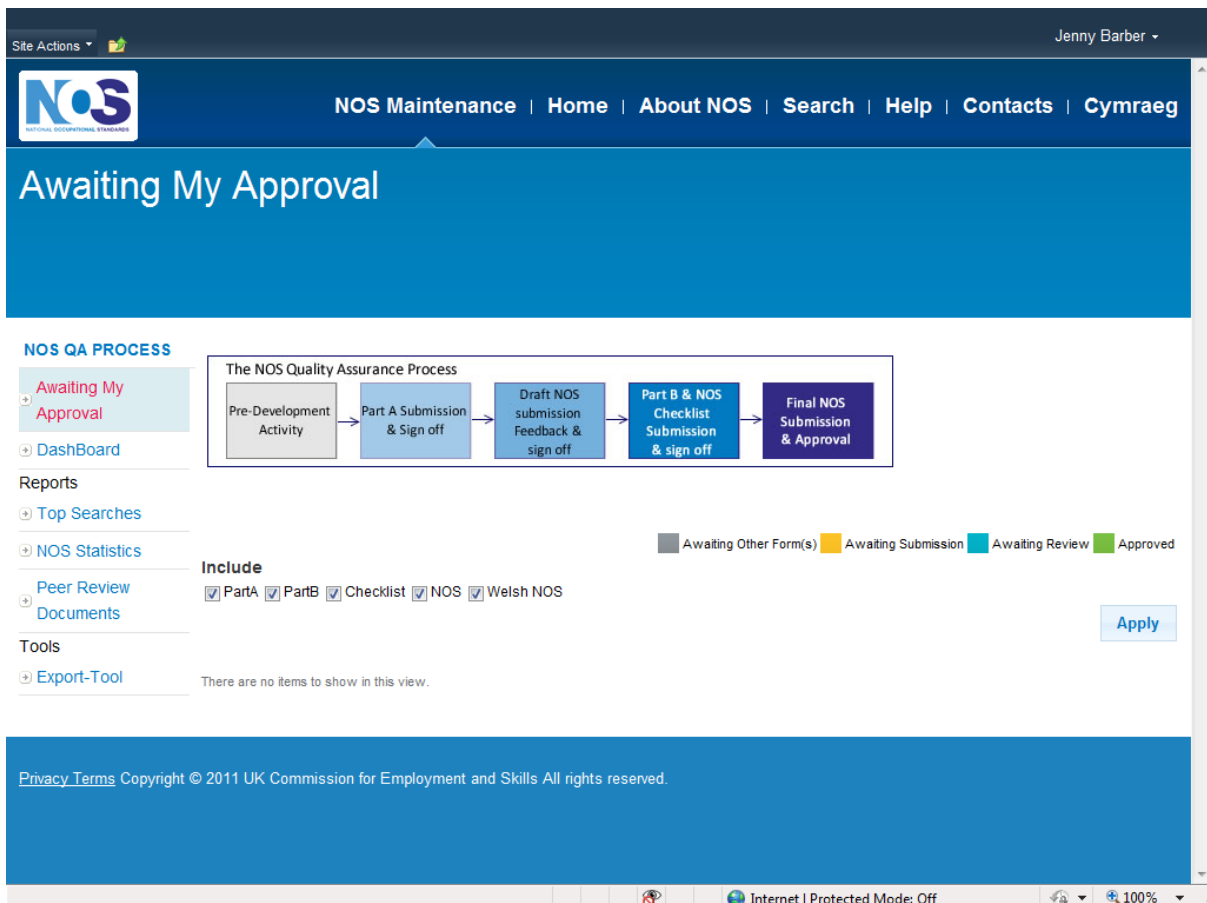


You must specify a value for this required field.

Internally Reviewing submitted Checklists before sending to UKCES

Any Checklists submitted need to be internally checked by someone else in your organisation before you submit the completed checklist to the UK Commission for final approval. You should already have allocated someone internally as your 2nd level QA person.

To access and review a submitted Checklist, the user simply clicks the Awaiting my approval left hand menu option. This opens up all projects for your SSC/O with checklists for internal review. Click on the Checklist tab in the relevant project. This will show as Awaiting Review/blue.



The screenshot shows a web application interface for the NOS Quality Assurance Process. At the top, there is a navigation bar with the NOS logo and links for Maintenance, Home, About NOS, Search, Help, Contacts, and Cymraeg. The main heading is "Awaiting My Approval". Below this, a flowchart titled "The NOS Quality Assurance Process" shows five stages: Pre-Development Activity, Part A Submission & Sign off, Draft NOS submission Feedback & sign off, Part B & NOS Checklist Submission & sign off, and Final NOS Submission & Approval. The "Part B & NOS Checklist Submission & sign off" stage is highlighted in blue. To the left of the flowchart is a sidebar menu with options: "Awaiting My Approval" (selected), "Dashboard", "Reports" (with sub-options for Top Searches, NOS Statistics, Peer Review Documents), and "Tools" (with an Export-Tool option). Below the menu is an "Include" section with checkboxes for PartA, PartB, Checklist, NOS, and Welsh NOS, all of which are checked. A legend at the top right of the main content area shows color-coded boxes for "Awaiting Other Form(s)", "Awaiting Submission", "Awaiting Review", and "Approved". An "Apply" button is located at the bottom right of the include section. At the bottom of the page, there is a footer with "Privacy Terms" and "Copyright © 2011 UK Commission for Employment and Skills All rights reserved." The browser's address bar at the very bottom shows "Internet | Protected Mode: Off" and a zoom level of 100%.

This will load the Checklist form, with submitted information as read only, with additional boxes where the user can carry out the second level internal QA. Once completed click on the submit to UKCES button.

Part B

Part B follows the exact same process as Part A but is started by clicking the Part B tab on the Dashboard page for the relevant project. This will load a screen similar to that of Part A which needs completing in the same way. Complete each question, saving as you go if necessary by clicking the Save button. Once complete click the Submit to UKNP button and if necessary correct any errors indicated.

The screenshot displays the 'Pages - Part B' interface. At the top, a progress bar indicates the status of four stages: PartA (Approved), PartB (Awaiting Submission), Checklist (Awaiting Submission), and NOS (Awaiting Submission(Draft)). Below this, the title is 'Cash Processing 2011'. There are four tabs for regions: England, Wales, Scotland, and Northern Ireland. The main content area contains four text input fields with prompts: 'Give details of those who participated in your engagement activities *', 'Give a brief summary of your English findings/outcomes *', 'Explain how the findings in England informed the development of the NOS *', and 'Highlight any specific issues raised by those consulted in relation to:'. A sidebar on the left contains navigation menus for Site Actions, Reports, Tools, and Admin. A sidebar on the right shows a list of 'NOS' items with an 'Apply' button. The browser's taskbar at the bottom shows 'Internet | Protected Mode: Off' and '100%' zoom.

Add any comments needed and click Submit to UKCES for approval.

Submission of Final NOS

Once Part B has been approved by all 4 nations and the checklist has been approved, you should upload your final NOS and supporting documents as per the process described under Draft NOS. Simply open the NOS (awaiting submission final/yellow) screen from the Dashboard page, upload the final NOS and supporting documents and press Submit to UKNP.

You only need to upload new and revised NOS.

Imported NOS

Where you are importing NOS from elsewhere, whether your own NOS from another suite, or from another SSC/O, these do not need to be uploaded on to the NOS Database. Each individual NOS will only appear once on the NOS Database.

As part of the dialogue you would normally have with SSC/Os whose NOS you are importing, you would ask them to add the relevant metadata to the back page of the original NOS eg you would need to ask the relevant SSC/O to add the name of the suite you have imported this NOS into. You will need to agree a timescale with the relevant SSC/Os for them to make these changes, to take place post approval of your current project.

If you are importing your own NOS from other suites, you would need to update this information on the relevant original NOS. We would recommend in these instances, that you make the changes to the metadata of the NOS you are importing and submit these along with the new and revised NOS as part of your current project. This will save you time and effort at a later stage.

Final NOS approval

Once the Final NOS have been approved, they will be published into pdf and made live on the public NOS Database website. At the same time, all staff with logins for your SSC/O will receive an e mail notification informing them that the final NOS have been approved.

The content of NOS documents including the metadata on the last page will not be able to be changed without completing the full Project approval process again. The **system** metadata can be changed by the originating SSC/O by accessing the individual NOS document via the search facility and clicking on the edit icon.

Submitting Welsh Documents

To access the facility to submit NOS in Welsh for approval, uncheck the completed box on the Dashboard page and click apply. This will bring up a list of all projects including those completed to the final English NOS stage. Click on the Welsh NOS tab of the relevant project. This will open a screen which will enable you to upload Welsh NOS documents in the same way as the English version. There is a separate Welsh NOS docx template under the New Document link as opposed to the English version.

Welsh NOS can only be submitted once the English versions have been fully approved and there is only a final approval process. The one submission and subsequent approval will result in the NOS documents being made live and publically available.

Other facilities for SSC/O login users

Reports

From within the Admin site you are able to view various reports from the reports section of the left navigation panel. Simply click the report that you wish to see to be taken to a page showing that report.

NOS Statistics

This report will show you the top downloaded NOS for each of the groups authenticated users (those with logins) and public users.

Peer Review Documents

This report shows you any NOS that SSC/Os have made available for peer review (see Peer Review section on page 8). It will show a list of NOS ordered by SSC/O, along with some key data about that document. Simply click the document to view the NOS and e mail your comments directly to the relevant SSC/O.

Export Tool

This tool will allow admin users to export data from the system in XML format. This will enable the data to be imported into other systems quite easily.

To export data, click the link to be presented by the export criteria page. Choose the criteria for the export, such as Organisation or occupation and click Export. The system will then search for all the documents that match your criteria and generate an xml file with all the data. Because of the time this process could take, your file may not be available for some time, Therefore you will be emailed with a link to your file, which you can click to download it to your local machine.

Search and Search results

Free Text Search

The easiest way to search for documents is to use the free text search. Simply type the word or phrase into the search box and click Search. This will search both the metadata for the document as well as the document itself, for the word or phrase entered.

The full search functionality will be re-introduced from the end of September and a Version 2 of this document will be produced to include user guidance for this area.

Search results and Search refiners

Whichever method of searching you choose, the system will show the results of the search in the results page. This will show links to the NOS that match the search criteria, along with additional data on the NOS that will help you give context to the document. Simply click the name of the document to open it and view its contents.

The results page will also show a series of 'refiners' that will allow you to narrow down the results in order to find the required document more easily. This appears at the left of the page, and contains a series of fields and values. The number within the brackets next to each value indicates how many documents have that value associated with it.

You can click on one of the values to refine the search results even further. The system will then only show the documents that have that field value, making it much easier for you to find the document(s) required.

Bulk Download

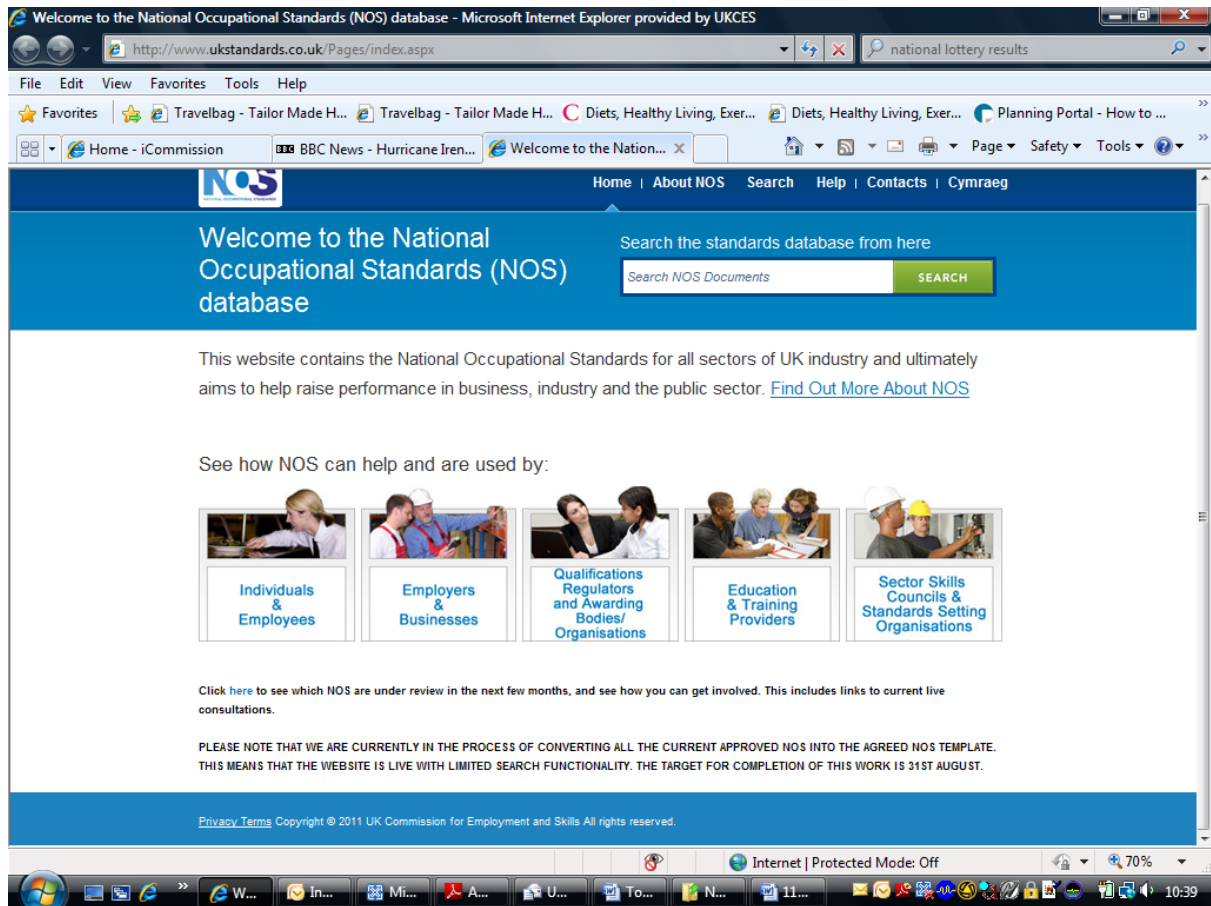
You are able to bulk download multiple documents into a zip file on your local machine. You choose which documents to download by clicking the check box next to each document link, so that an X appears in it. Once all the NOS documents required are checked, click the Download button to save the files into a zip file. You will be prompted to select a location on your local machine where the file is to be saved to, as well as being able to change the file name.

Once downloaded, simply open the zip file to view the individual documents.

Public Web Site

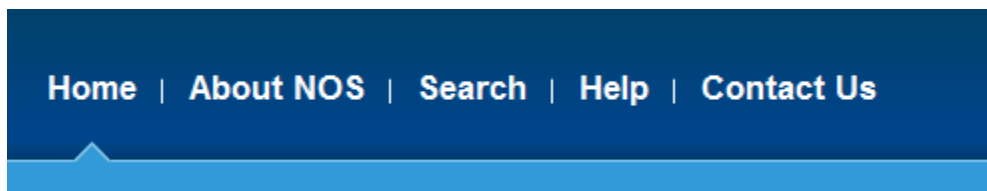
Welcome Page

This is the main page that all visitors will see when browsing to the site.



Navigation

This is the main navigation panel for the site. Either click on the link, or hover for a drop down menu of more pages. Home will take you back to the main welcome page.



Free Text Search

Search is either available via the home page or through the drop down link under search. Simply type in the search word or phrase and click search.

The full search functionality will be re-introduced from the end of September and a Version 2 of this document will be produced to include user guidance for this area.

Search the standards database from here

SEARCH

[Advanced Search](#)

About Links

These are the main links to the help pages, giving more details about what NOS are and how they relate to different people.

These pages are also available through the About NOS link on the main navigation bar.

FIND OUT MORE ABOUT NOS

See how NOS can help and are used by:

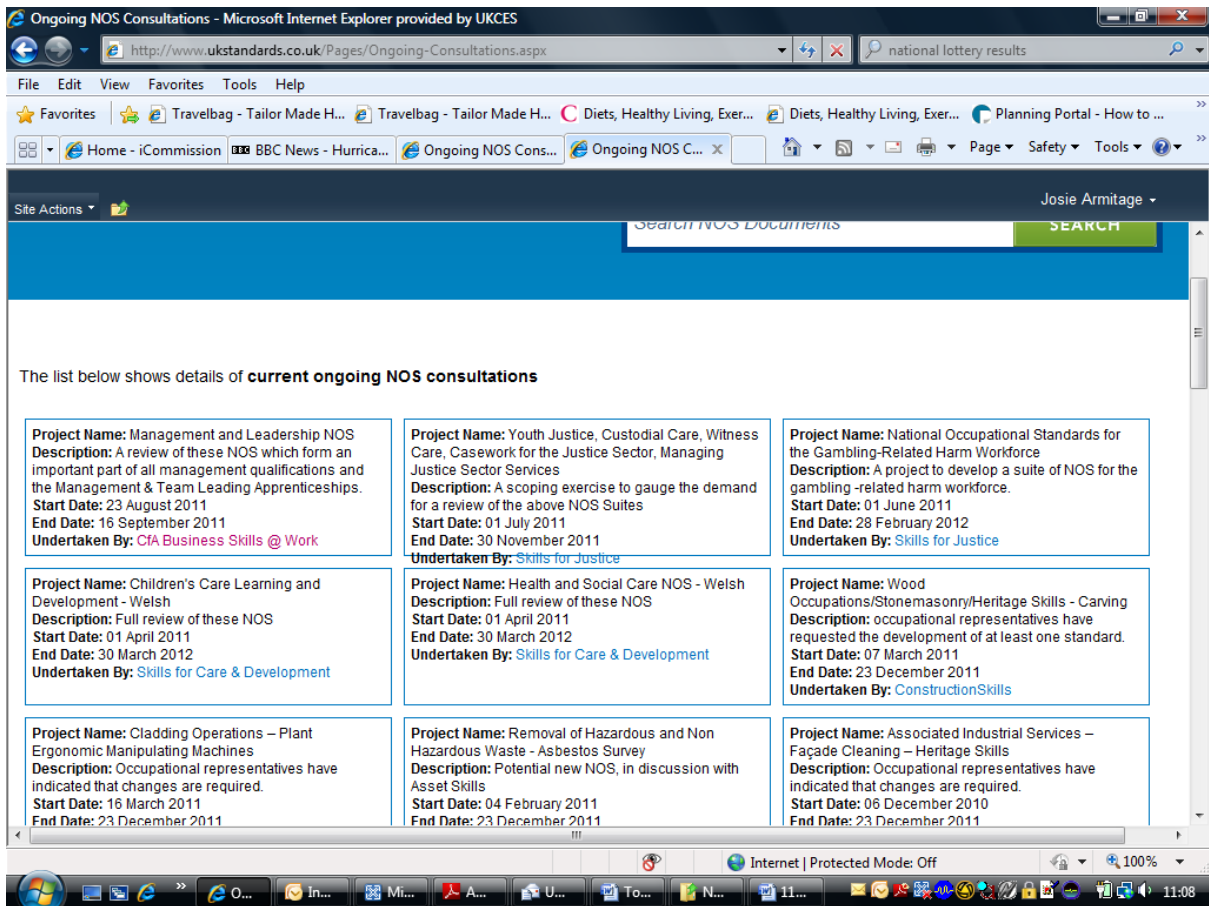


The NOS Database as a communication tool

The following areas of the website are available so that we can all make use of the NOS Database public website as an effective tool to raise awareness of NOS and encourage more employers and stakeholders to make use of these valuable resources. The website is therefore reliant on SSC/Os to provide nos@ukces.org.uk with accurate and current information. As we all begin to signpost employers and stakeholders to the NOS Database website, this is an important mechanism to also involve more people in your current work and consultations.

Consultations and current projects

Throughout the site, public users are signposted to the page below via the following information with links: **Click [here](#) to see which NOS are under review in the next few months, and see how you can get involved. This includes links to current live consultations.**

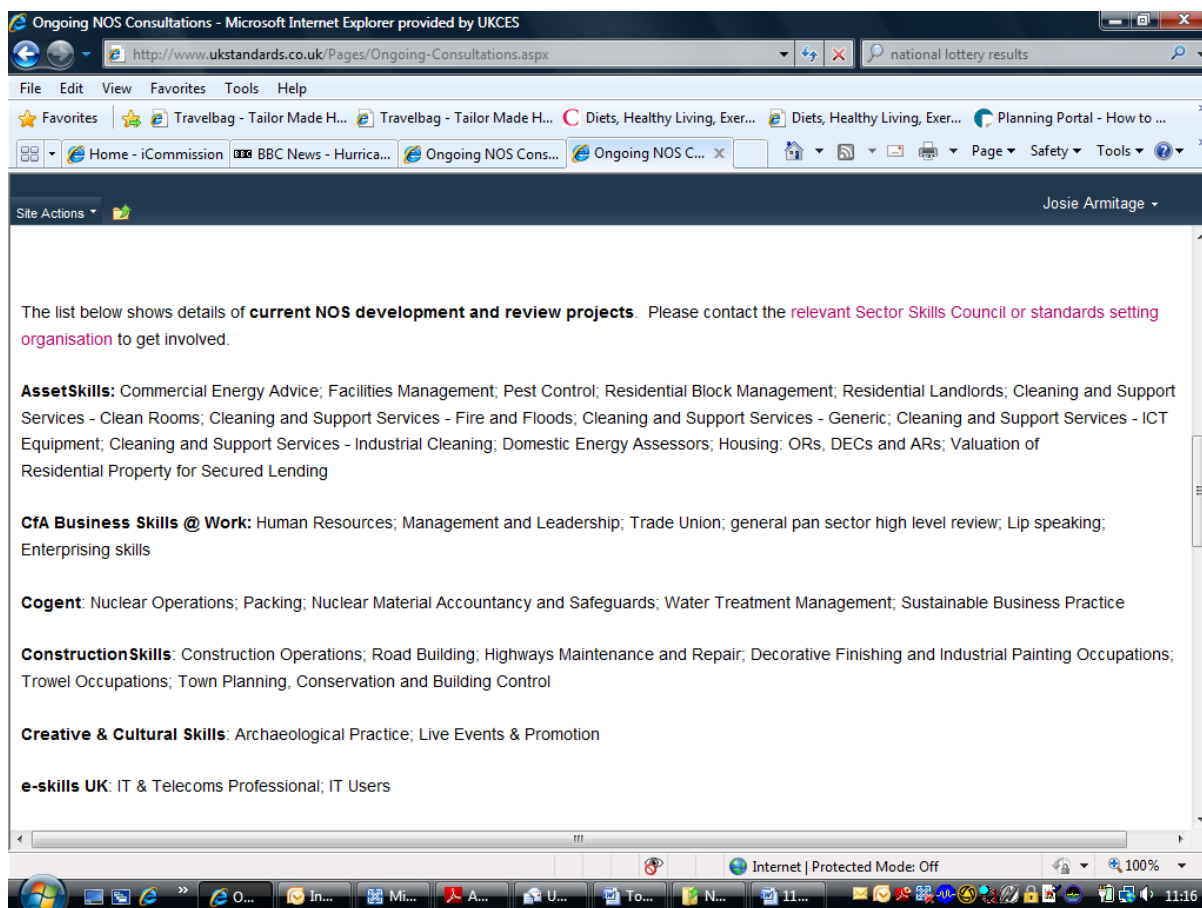


The success of this part of the website is reliant on SSC/Os providing up to date information on your current NOS consultations and was added at the request of SSC/Os to have this facility available so both other SSC/Os and partners are aware of current projects. Please provide information on your live NOS consultations via e mail to nos@ukces.org.uk

We recommend that you make use of this valuable facility by sending this information through on a regular basis.

The bottom of this same page shows details of current NOS projects for SSC/Os. Again the success of this part of the website is reliant on SSC/Os providing up to date information on your current NOS projects and was added at the request of SSC/Os and other partners to have this facility available. Please provide information on any new or changed projects via e mail to nos@ukces.org.uk. The information currently on this page is taken from current SSC/O contracts but we are aware that SSC/Os are starting different projects throughout the course of the year and we would need this accurate information to put on the website.

We recommend that you make use of this valuable facility by sending this information through on a regular basis.



Case Studies

Case studies showing a range of users eg employers who have effectively used NOS, how they have used them and the benefits of doing so have been made available by audience. SSC/Os and other stakeholders have sent these through to be uploaded on to the website.

Again the success of this part of the website is reliant on SSC/Os providing up to date case studies and this facility was added at the request of SSC/Os and other partners. Please provide up to date case studies via e mail to nos@ukces.org.uk. **We recommend that you make use of this valuable facility by sending this information through on a regular basis.**

