

## How to manage the overview of your organisation template in NHS Jobs user guide

This guide gives you instructions for how to manage the overview of your organisation template in the NHS Jobs service.

You can use the overview of your organisation template to automatically show when creating new job listings. Users can still edit this information when they're creating a new listing.

In your organisations account, you can add, change, or remove this information.

To find out which roles can do this, go to the '**Roles and permissions**' link in the '**Help and information**' section of the [employer dashboard](#).

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## Overview of your organisation

This page gives you instructions for how to manage the overview of your organisation template information.

**Important:** The employer dashboard is shown. You'll only see the 'Overview of your organisation' link if you're an NHS Jobs 'Super user' role for your organisations account.

To manage the overview of your organisation template information, complete the following step:

1. Select the '[Overview of your organisation](#)' link.

The screenshot displays the NHS BSA Training Dashboard. At the top, it indicates the user is signed in as 'NHSBSA Training' and provides options to 'Change' or 'Sign Out'. A 'BETA' notice states that user feedback will help improve the service. The main content area is titled 'NHS BSA Training Dashboard' and features two tabs: 'Tasks by stage' (selected) and 'Listings by user'. A dropdown menu shows 'Showing tasks for All users'. The dashboard lists various stages with their respective counts and progress bars:

| Stage                                 | Count                         | Progress                          |
|---------------------------------------|-------------------------------|-----------------------------------|
| <a href="#">Draft</a>                 | 100 - on track 29, overdue 71 | Progress bar (29% green, 71% red) |
| <a href="#">Approvals</a>             | 1                             | Progress bar (100% grey)          |
| <a href="#">Published</a>             | 12 - on track 10, overdue 2   | Progress bar (100% green)         |
| <a href="#">Shortlisting</a>          | 61 - on track 28, overdue 33  | Progress bar (28% green, 33% red) |
| <a href="#">Interviews</a>            | 22 - on track 1, overdue 21   | Progress bar (100% red)           |
| <a href="#">Ready to offer</a>        | 10 - on track 6, overdue 4    | Progress bar (60% green)          |
| <a href="#">Conditional offers</a>    | 5 - on track 3, overdue 2     | Progress bar (60% green)          |
| <a href="#">Pre-employment checks</a> | 1                             | Progress bar (100% grey)          |

The right-hand sidebar contains sections for 'What you can do' (with buttons for 'Create a job listing', 'Search for a listing', and 'Search for an applicant'), 'Manage the account' (with links for 'Manage users', 'At risk applicants', 'Accredited logos', 'Key performance indicators (KPIs)', 'Approval settings', 'Departments', 'Criminal convictions and cautions', 'Welsh listings', and 'Moving applicants to other accounts'), and 'Documents and templates' (with links for 'Overview of your organisation' (highlighted with a '1' in a yellow circle), 'Supporting information library', and 'Contract templates').

## Add your overview of your organisation template (optional)

This page gives you instructions for how to add your overview of your organisation template information.

**Important:** This template will automatically show when creating new job listings. Users can still edit it when they're creating a new listing. You have a limit of 1500 characters, including spaces.

To add your overview of your organisation template information, complete the following steps:

1. In the **Overview of your organisation** box, enter the details.
2. Select the [Save template](#) button.
- or
3. Select the 'Return to dashboard' link.

The screenshot shows the 'Add your overview of your organisation template (optional)' page in the NHS Jobs system. At the top, there is a blue header with the NHS logo and 'Jobs' text. On the right side of the header, it says 'You're viewing NHS BSA Training' with a 'Change' link, and 'Signed in as NHSBSA Training' with a 'Sign Out' link. Below the header, there is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' A 'Go back' link is located on the left. The main heading is 'Add your overview of your organisation template (optional)'. Below this, there is a blue vertical bar and a paragraph: 'This template will automatically show when creating new job listings. Users can still edit it when they're creating a new listing.' Further down, there is a paragraph: 'Introduce the team, the atmosphere, work ethic and benefits of working at your organisation.' Below that, it says 'You have a limit of 1500 characters, including spaces.' A large text input area is shown with a toolbar above it containing icons for undo, redo, bold, italic, and list. A yellow circle with the number '1' is placed to the left of the input area. Below the input area, it says 'You have 1500 characters remaining'. Below the input area, there is a green button labeled 'Save template' with a yellow circle with the number '2' to its left. Below the button, there is a link 'Return to dashboard' with a yellow circle with the number '3' to its left. At the bottom of the page, there is a footer with links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'Help and guidance'. On the right side of the footer, it says '© Crown copyright'.

**Tip:** Introduce the team, the atmosphere, work ethic and benefits of working at your organisation.

If you've selected 'Return to dashboard', you've reached the end of this user guide.

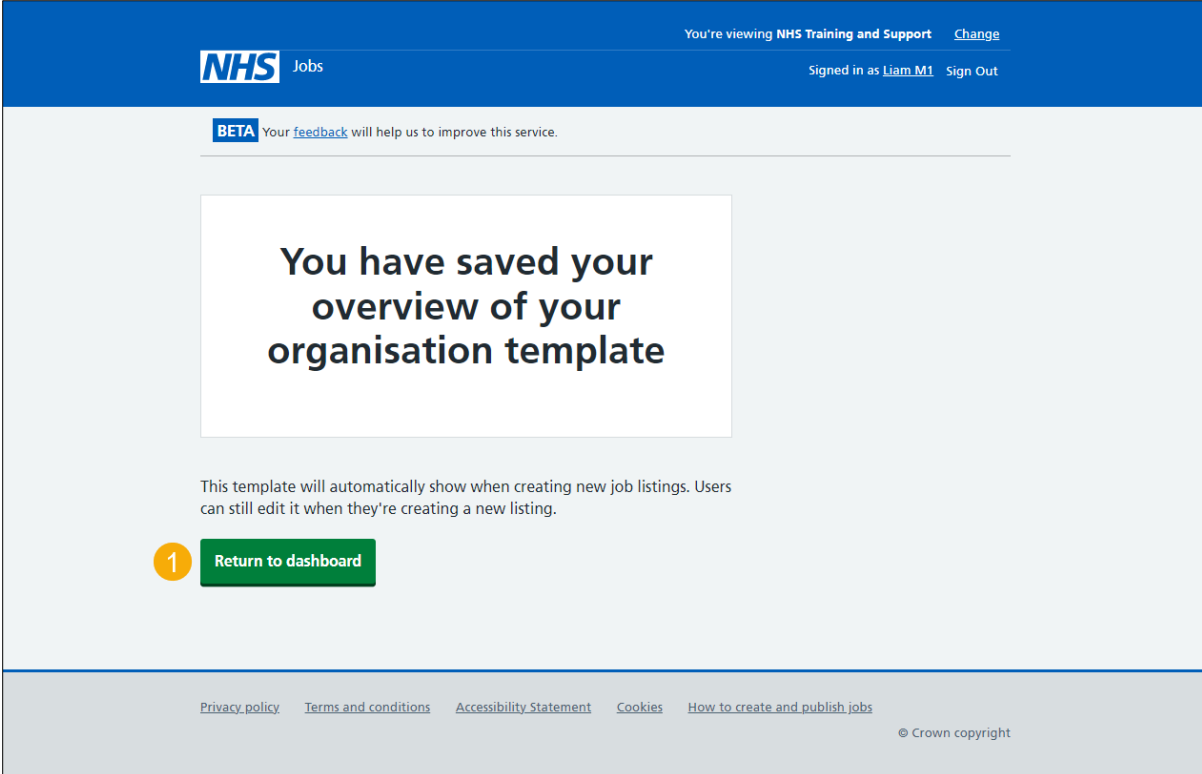
## You have saved your overview of your organisation template

This page shows confirmation you've saved your overview of your organisation template.

**Important:** This template will automatically show when creating new job listings. Users can still edit it when they're creating a new listing.

To return to your dashboard, complete the following step:

1. Select the 'Return to your dashboard' button.



The screenshot shows a web page with a blue header. On the left is the NHS Jobs logo. On the right, it says 'You're viewing NHS Training and Support' with a 'Change' link, and 'Signed in as Liam.M1' with a 'Sign Out' link. Below the header is a 'BETA' badge and a message: 'Your feedback will help us to improve this service.' The main content area has a large white box with the text 'You have saved your overview of your organisation template'. Below this box is a paragraph: 'This template will automatically show when creating new job listings. Users can still edit it when they're creating a new listing.' At the bottom left of this area is a green button with a yellow circle containing the number '1' and the text 'Return to dashboard'. The footer contains links for 'Privacy policy', 'Terms and conditions', 'Accessibility Statement', 'Cookies', and 'How to create and publish jobs', followed by '© Crown copyright'.

You've saved the overview of your organisation template and reached the end of this user guide.