

ESR Roadmap and Release 36 Highlights

North West BIG SIG

September 2017

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NW & Wales



Item	Comments
E-learning and Learning User de-commissioning 30 th September 17	Use of one of the Employee Self Service URPs to complete e-Learning
mhapp de-commissioning 31 st December 17	Access to ESR via the ESR Portal

Portal Provisioning Status



National Picture

- 101,744 unique employees have now accessed the Portal Nationally. This is 7.3% of the headcount across all provisioned sites;
- The proportion of employees, on ESR, who have now opted out of received a paper payslip has now increased to 12.8% – 223,426 employees. This is an increase of 8,943 in the reporting period.

Northwest Picture

- 11,016 total logins for Northwest which equates to 5% of the total headcount. This is 2.3% below the national average.
- 67 NW organisations are now provisioned onto the Portal, with only 4 more to do in September.
- North West top Organisation is currently 20th in the National League Table

Transforming User Experience	Portal Beta Test (including mobile)					
	EBS UI skin part 1 (including mobile)	Portal full release (including mobile)				
	ESS UI Optimisation Part 1	ESS UI Optimisation Part 2		Organisation Chart		
	MSS UI Optimisation Part 1	MSS UI Optimisation Part 2	Common ID	Improved Search		
	OLM “Quick Wins”	Organisation Chart PoC	MSS over internet		Further UI Optimisation - OLM	
	December 16 (R33)	March 17 (R34)	June 17 (R35)	September 17 (R36)	December 17 (R37)	March 18 (R38)
Increasing Business functionality	GR1 Welsh requirements	PAY1 Exceptions (now 34.2)	GR8 E-mail notification (2)	SS1 Multiple supervisors	PAY2 Leavers early in month	
	GR8 E-mail notification Part 1A	LM1 Competency Requirements		SS3 ESS self service comments		
	PAY1 Payroll analysis	LM2 Auto Enrolment		LM3 External Learners		
	PAY5 NI changes	Pay slip Changes To Professional Users				
	SS2 On-line Payslip Part 2	GR8 E-mail notification Part 1B (agile releases)				

Oracle 12.2 Upgrade

Description	Release
Multiple Supervisors	R36
Organisation Chart	R36
Self Service Comments	R36
Purge External Learners	R36
ESR Search	R36
Internet Access to ESR BI for Professional Users	R36

Description	Release
Competency Expiry Dates Added to ESS Upcoming Tasks and MSS Team Actions Portlet	R36
Incremental Dates Added to ESS Upcoming Tasks and MSS Team Actions Portlet	R36
Local Links Portlet and Ability to Reorder	R36
Upcoming Classes to be Improved to Allow Class Registrations	R36



Electronic Staff Record
Burton Hospitals NHS Foundation Trust

My Role

HR

My Pages

DashBoard

ESR Navigator

EBS Search

Reporting

Search...



- 206NADCOCK ▾

EBS Search

Person Name

Jones



Person Type

[Select None](#)

☒ Employee

☒ Ex-Employee

☒ Applicant

☒ External Learner

☒ Contingent Worker

Employee Number

Applicant Number

NI Number

Organisation



Search

Clear

Search Via Core ESR Forms

Electronic Staff Record Programme



Oracle Applications - DTST - ESR Release V35.1.0.0D (with DM24.0C)+ on-going

File Edit View Folder Tools Window Help

ORACLE

Enter HR Personal Information - Combined

Name

Last **Jones-Fussell**

First **Philiseta**

Title **Mrs.**

Prefix

Suffix

Middle

Gender **Female** Action

Person Type for Action

Person Types **Ex-Employee**

Identification **Employee** **93916094**

NI Number **WK091325C**

Personal Employment Office Details Applicant Further Name Other Benefits

Birth Date **12-AUG-1960** Age **57**

Town of Birth

Region of Birth

Country of Birth **United Kingdom**

Status **Married**

Nationality **British**

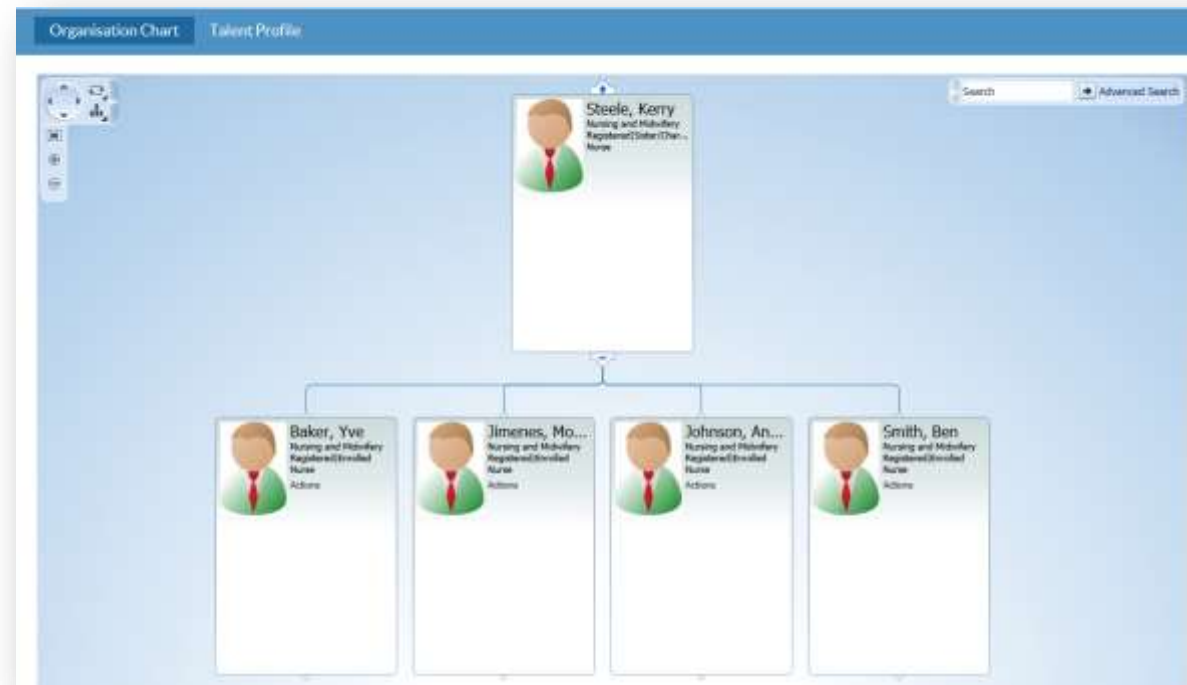
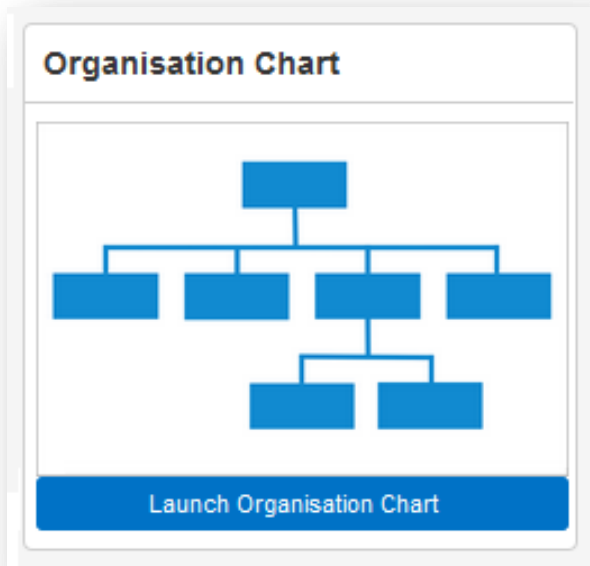
Disabled

Effective Dates

From **25-APR-2009** To

Latest Start Date [**10**]

Address Contact Assignment Special Information Others...



≡

NHS

Home Logout Preferences Help

Organisation ChartTalent Profile

○ Notifications

○ All Actions Awaiting Your Attention

○ Personal Information

○ Contacts

○ Employment Information

○ Property Register

○ Assignment (Approval Required)

○ Hours (Approval Required)

○ Supervisor

○ Additional Supervisor

○ Location

○ Absence

○ Absence Calendar

○ End Employment (Approval Required)

○ End Non Primary Assignment (Approval Required)

○ Medical and Dental Job Plans

○ Suitability Matching

○ Compliance and Competency

○ Qualifications

○ Registrations and Memberships

○ Manage Hires (Approval Required)

Personal Information

Employee Name

Moises, Miss Kaylen

Employee Number

93904017

Basic Details

Full Name

Moises, Miss Kaylen

Employee Number

93904017

Work Email Address

Kaylen.Moises@nowhere.co.uk

View and Update

✔ **TIP** To view further basic details including e-mail address, gender and nationality, click the 'View and Update' button.

Phone Numbers & Personal E-Mail

Home

00004363631

Mobile

00017414650

Update

Addresses

Address Line 1

3904017 Peachtree Avenue

Address Line 2

Address Line 3

Town

London

County

Greater London

Post Code

Country

United Kingdom

Type

Home

Update

Add

▼ My Calendars

Kerry Steele - Upcomin

Kerry Steele - Leave C.

Kerry Steele - Appraisa

Kerry Steele - Registrat

Kerry Steele - Certificat

Kerry Steele - Visa Cal.

Kerry Steele - Illegal W.

Kerry Steele - Fixed Te

Kerry Steele - Revalida

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Kerry Steele - Incremen

Kerry Steele

Date Calendar

▼ My Calendars

Kerry Steele - Upcomin

Kerry Steele - Leave C.

Kerry Steele - Appraisa

Kerry Steele - Registrat

Kerry Steele - Certificat

Kerry Steele - Visa Cal.

Kerry Steele - Illegal W.

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Kerry Steele - Revalida

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Kerry Steele

Competency Expiry Dates

Calendar

Team Actions

Monday September 4, 2017

In the next 7 days 1 of your team have upcoming events.

Upcoming Class Enrolments: (1)

Leave: (1)

Fixed Term Contract End Date: (1)

View Team Calendar

My Annual Leave

Assignment: ?

26704854 - 16659497|Positio ▼

Accrual Plan: Annual Leave Accrual 1
NHS

Entitlement: 21.5 Days ▼

Taken: 0 Days
Booked: 0 Days
Remaining: 21.5 Days

Create Annual Leave

View Absence Calendar

My Annual Leave

Assignment: ?

26704854 - 16659497|Positio ▼

Accrual Plan: Annual Leave Accrual 1
NHS

Entitlement: 23.5 Days >

Your entitlement balance includes:
Statutory Days: Yes
Carry Over: 2 Days

Taken: 0 Days
Booked: 0 Days
Remaining: 23.5 Days

Create Annual Leave

View Absence Calendar

Annual Leave Accrual 1 NHS (20000845-2)	
Entitlement	21.5
Carry Over	0
Statutory Days	Yes
Taken	1
Remaining	19.5
Booked	1

Information: To reorder the Local Links, please click on and drag the Local Link to a new location within the list, and the other items will adjust to fit

Local Links

Title	Link	Last Updated		
ESR Infopoint	https://www.infopoint.esr.nhs.uk/	12-Sep-2017	Edit	Delete
NHS Pensions	https://www.nhsbsa.nhs.uk/nhs-pensions	12-Sep-2017	Edit	Delete

[Add Link](#)

Local Links

[NHS Pensions](#)

[Book Annual Leave](#)

[Holidays 2017](#)

[ESR Infopoint](#)

Assignment Extra Information(Smith, Mr. Ben)

Type

- Appraisals and Development Summary
- Employee Additional Supervisor**
- Exit Questionnaire
- GB Pension Exclusion Rules
- Interfaces
- RTI Information
- TUPE Transfer

Details

Further Assignment Information

Employee Additional Supervisor **Steele, Mrs. Kerry** 26717377, 22441155|Po:

From Date **01-SEP-2017**

To Date

OK Cancel Clear Help

NHS My Team Assignment Information Home Logout Preferences Help

Extra Information

Employee Name Jimenez, Miss Monica
Employee Number 26717378

An assignment cannot have more than 3 active Additional Supervisor rows.

Employee Additional Supervisor

Add

Select Status	Employee Additional Supervisor	From Date	To Date
No results found.			

Cancel Back Next

Home Logout Preferences Help
Switch to Mobile

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Release 36.2 end October 17

- New Class Update Portlet
 - Introduce a new portlet which can be added to the Learning Administration dashboard allowing the update of attendees status on class up to 7 days in the past.

What will it look like?

Update Attendance

A summary of classes for the previous 7 days. Select 'View Classes' to update attendance.

Day	Date	Classes	Min. not met
Tue	18/07	20	12
Mon	17/07	10	0
Sun	16/07	18	0
Sat	15/07	4	4
Fri	14/07	1	1
Thu	13/07	1	1
Wed	12/07	1	1

[View Classes](#)

Portal Global Header

Portal Navigation Menu

Classes

Sort by:

Fire Safety Min Attendance: Not Met

17/10/2016 09:00

Class: Class name
Venue: Venue name
Attendance: 7
Minimum Attendance Met: No (8)
Waitlisting: 1
STC: Yes
Status: Normal

[View Class Details](#)

[Update Attendance](#)

Fire Safety Min Attendance: Met

18/10/2016 13:30

Class: Class name
Venue: Venue name
Attendance: 52 of 60
Minimum Attendance Met: Yes (10)
Waitlisting: Nil
STC: No
Status: Normal

[View Class Details](#)

[Update Attendance](#)

<Class Name>: Enrolments

[Return to Dashboard](#)
[Return to Classes](#)
[View Class Details](#)

Course Name: MD Course Class Start Date: 01-Jun-2017
Course Code: MD0012 Class End Date: 01-Jun-2017
Class Name: MD Class Class Start Time: 09:00 AM
 Class End Time: 10:00 AM

Filter enrolment status

Enrolment Status:

☒ Requested ☒ Confirmed
☒ Withdrawn ☒ Completed
☒ Waitlisted ☒ Did Not Attend

Organisation: ☒ Show

Learner ▲	Organisation ▲	Enrolment Status ▲	Update
Musk, Mr. Elon	258 Newham University Hospital NHS Trust	Confirmed	<input checked="" type="checkbox"/>
Obama, Mr. Barack	258 Newham University Hospital NHS Trust	Requested	<input checked="" type="checkbox"/>
Smith, Mr. Alpha	269 Nottingham University Hospital NHS Trust	Requested	<input checked="" type="checkbox"/>
Smith, Mr. Fox	269 Nottingham University Hospital NHS Trust	Waitlisted	<input checked="" type="checkbox"/>
Trump, Mr. Donald	269 Nottingham University Hospital NHS Trust	Withdrawn	<input type="checkbox"/>

▲



Questions?



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