ELECTRONIC STAFF RECORD

RN546 Guide to Enhancements and Changes Release 58.2.0.0

Information classification: PUBLIC

Revision Date: AUGUST 2023

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<u>Contents</u>

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1 <u>Introduction</u>

The purpose of this document is to provide details of the enhancements to the ESR system in Release 58.2.0.0. The details are grouped in functionality order.

The changes to functionality outlined in this Release Notice are subject to successful testing. As is normal practice, any amendments to the content of the Release will be communicated in a revised Guide to Enhancement Notice.

NOTE: All Employee data used in this publication is fictional. Any similarity with the names used in this publication with the names of actual persons is purely coincidental and not intentional.

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2   <u>Upgrade to Liferay</u>

ESR has been upgraded to Liferay DXP 7.3.

The key changes are as follows:

<u>Local Links Functionality</u>

Local links are now delivered using the existing Web Content functionality.

Please refer to UN3341 for further details.

<u>ESR Hub</u>

This release also introduces several look and feel changes across the web pages as follows:

Navigation and Sub-Navigation displays a white border on click.

Login to ESR button displays a white border on click.

After a user has logged in, their user initials display within a circle.

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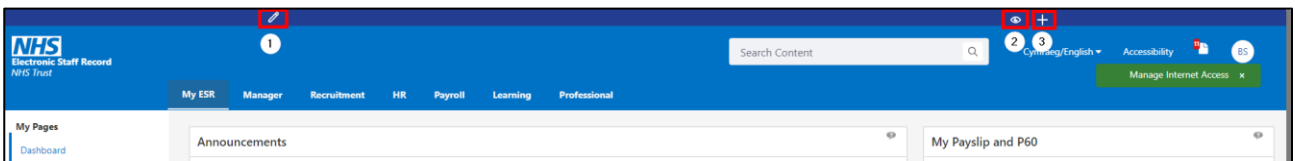The circle changes to a rectangle when the cursor is placed over it.

Clicking the User's initials displays the full name of the user.
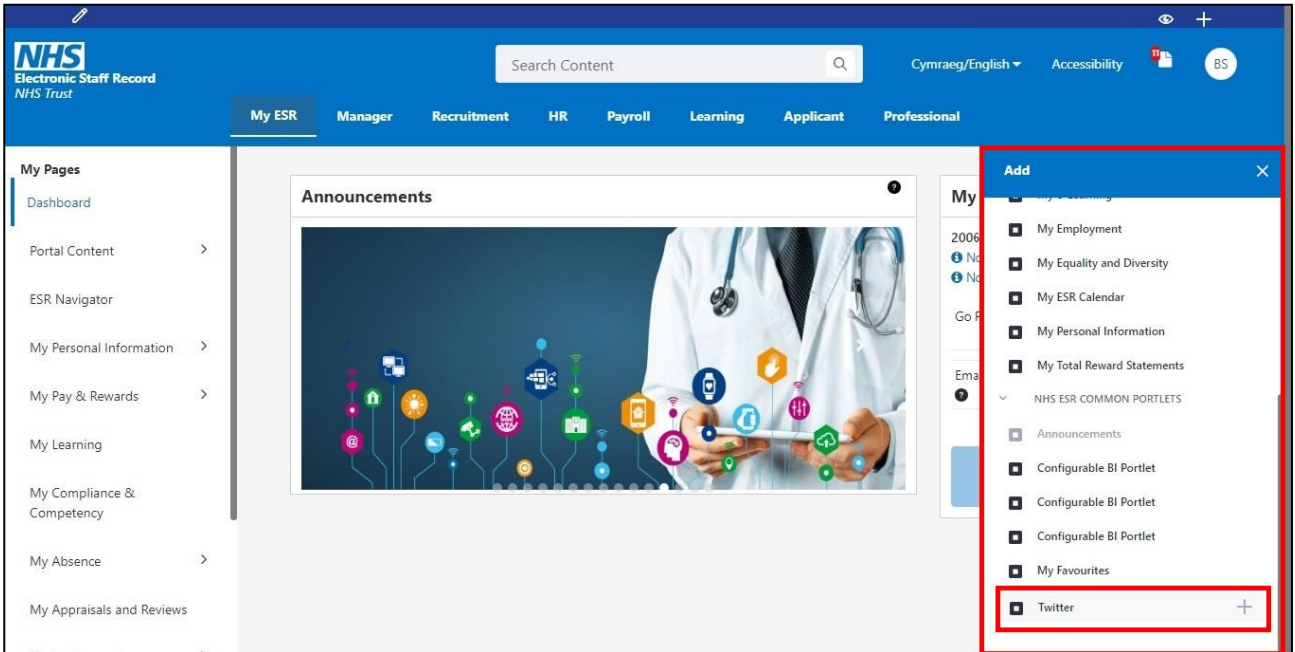
My ESR Dashboard

1. Customised dashboard accessed by clicking on the control menu (pencil icon).
2. Eye icon – provides a toggle for portlet configuration.
3. Plus icon – opens a right-side navigation menu containing the Portlet Library and Contents tab containing web content.
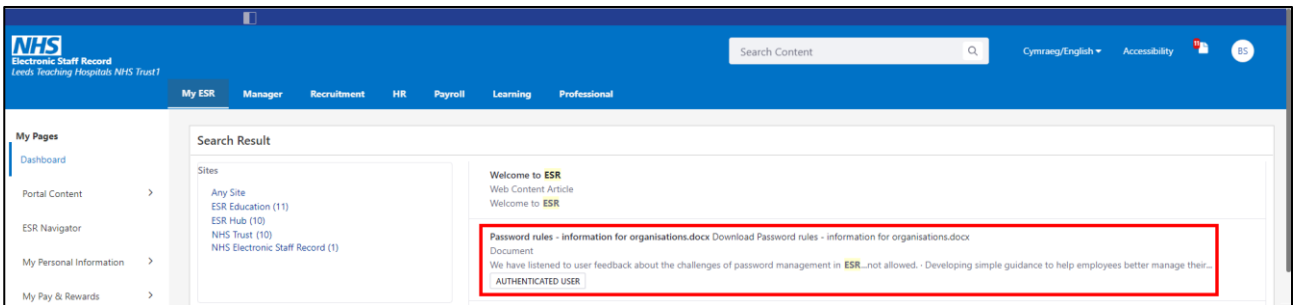
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Customised dashboard, click the plus icon to add a portlet to the dashboard.

Search Results Page

In the search results page, there are several changes:
- Content title is in dark black
- Tag appears in upper case and displays within a rectangular box
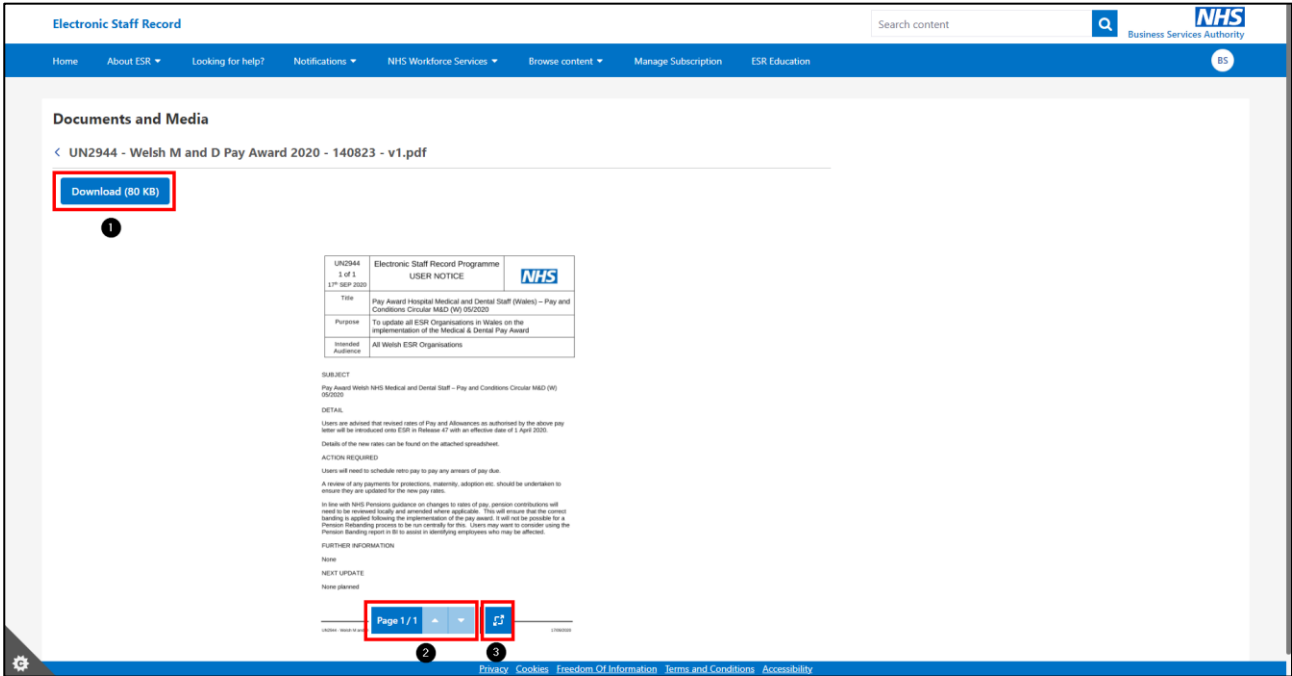- Tag text colour is dark grey

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PDF Viewer Screen in Notifications

1. Download button annotated with document size.
2. PDF viewer has up/down arrow controls to browse PDF pages.
3. PDF viewer has different controls to zoom in/out.

Other changes are:

- No information regarding uploaded by and tag below the document title
- No tile view available in PDF viewer

Twitter Portlet

Users with Professional Dashboard will need to readd the Twitter Portlet to their Dashboard following release.

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3   <u>New National Subjective Codes</u>

The following values have been added to the Subjective Code list of values effective from 01-JAN-1951:

- NHS6132 - Advanced Clinical Practitioner Band 8c
- NHS6133 - BANK Porter/Driver/Stores Band 3
- NHS6134 - BANK Security/Control Staff Band 2
- NHS6135 - BANK Security/Control Staff Band 3
- NHS6136 - BANK Security/Control Staff Band 4
- NHS6137 - Bank Pharmacist Band 5
- NHS6138 - Bank Pharmacist Band 6
- NHS6139 - Bank Pharmacist Band 7
- NHS6145 - Bank Social Worker - Band 5
- NHS6146 - Bank Social Worker - Band 8a
- NHS6147 - Bank Social Worker - Band 8b
- NHS6148 - Bank Technician / Instructor (STT) Band 5
- NHS6149 - Porter Team leader / Supervisor Band 3

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4   <u>Restrict Use of National Trust Identifier and Frameworks</u>

From this release onwards all competencies set up locally must match the format:
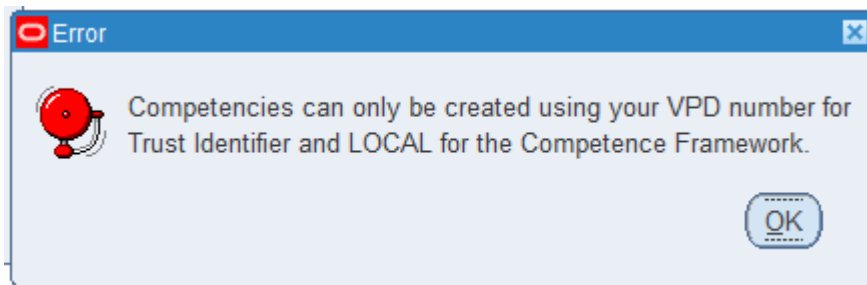
XXX|LOCAL|<competence name>|

Where XXX is the VPD associated with the user responsibility you are currently logged in as.

<u>Data Entry</u>

When entering a new competence via the Competencies form, new validation will occur to ensure the full competence name meets the criteria outlined above.

If the competence does not meet this naming convention, then a new message will be displayed in the form as follows:

This validation will also run when updating a local competence.

<u>Data Fix</u>

As at the release date all local competences will be checked and any that do not match this naming convention will be updated by a one-off data fix.

Where Trust Identifier (segment 1) of the local competence is 'NHS', then this will be updated to be the VPD of the trust that currently owns the competence.

Where Competence Framework (segment 2) of the competence is not 'LOCAL' this will be updated to be 'LOCAL'. This includes any competences where segment 2 is currently null.

In scenarios where the data fix could create a duplicate, the Competence Name (segment 3) will be appended with xDF. Where x is the number of duplicates created.

Some examples of data fixes for local competences already setup in trust XXX:

NHS|LOCAL|Competence A| becomes   XXX|LOCAL|Competence A|

XXX||Competence B| becomes   XXX|LOCAL|Competence B|

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After the release, when the data fix script has been run, users can identify competence updates where conflicts were found from the user form by using the following query.

(replacing XXX with the VPD of their current responsibility)

This will return all local competences that needed the Competence Name updating to be unique.

Users are advised to review these and update the Competence Name as required.

Legacy Competences

The Trust identifier will not be updated to the most recent VPD if a competence was created in a previous organisation prior to a merge.

For example, VPD 'YYY' may have merged into VPD 'XXX'.

A competence in the form:

YYY|MAND|Competence C| will be updated to YYY|LOCAL|Competence C|

Any future changes attempted through the competence form would require the Trust Identifier to be updated to the current VPD for the organisation.

Impact on ESR BI reports

Where organisations have hard coded reports then they may need to review to ensure that the correct information is now returned.

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5   Additional Benchmarking in ESRBI

Several new benchmarking measures have been added to ESR BI as below:

- Stability (FTE) %
- Stability (Headcount) %
- Stability (FTE) % (12m)
- Stability (Headcount) % (12m)
- Percentage of Leavers by Leaving Reason
- Percentage of Leavers by Destination on Leaving
- Percentage of Flexible Working Requests Approved
- Percentage of Leavers completing an Exit Questionnaire

They can all be found in the Human Resources - Workforce Profile subject area. Percentage of Flexible Working Requests Approved can also be found in the Human Resources - Person EIT Details subject area, whilst Percentage of Leavers completing an Exit Questionnaire can also be found in the Human Resources - Assignment EIT Details subject area.

All metrics are monthly measures with the Stability (FTE/Headcount) % also being available as a twelve-monthly rolling measure.

The Stability (FTE/Headcount) % works in a similar way to the existing Labour Stability % within the Labour Turnover and Stability page of the NHS Staff Movements Dashboard in ESRBI.

For the Percentage of Flexible Working Requests approved metric, the Process Start Date will determine which month the request falls in.

Percentage of Leavers completing an Exit Questionnaire metric a Questionnaire will deemed as completed if at least one question has been answered.

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