

# Workstructures

## Organisations



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### Overview

Workstructures in ESR must be set up to reflect the way in which you wish to record and report upon your Organisation.

The set-up of Workstructures should be decided through collaboration between HR and Finance Departments. However the needs of Payroll and the organisation's management tiers need to be considered. This is critical for meaningful Organisational reporting.

The hierarchy should reflect the structure of the Employing Authority. There are two types of Organisation Classifications:

- HR Organisations – which employees are attached to.
- Training Centres – which can be used as OLM Training Centres or to define external Training providers.

### Benefits

- Organisations are used to group staff together for reporting and security purposes.
- Enables the financial Charitable Marker and cost codes to be attached to different groups of employees.
- Determines the output of any Organisation based workforce, financial, and compliance reports in terms of its Directorates, Divisions, Clinical Management Teams, Wards, Departments to support business planning and decision making.
- Can group and record Hosted employees.

# Workstructures

## Organisations

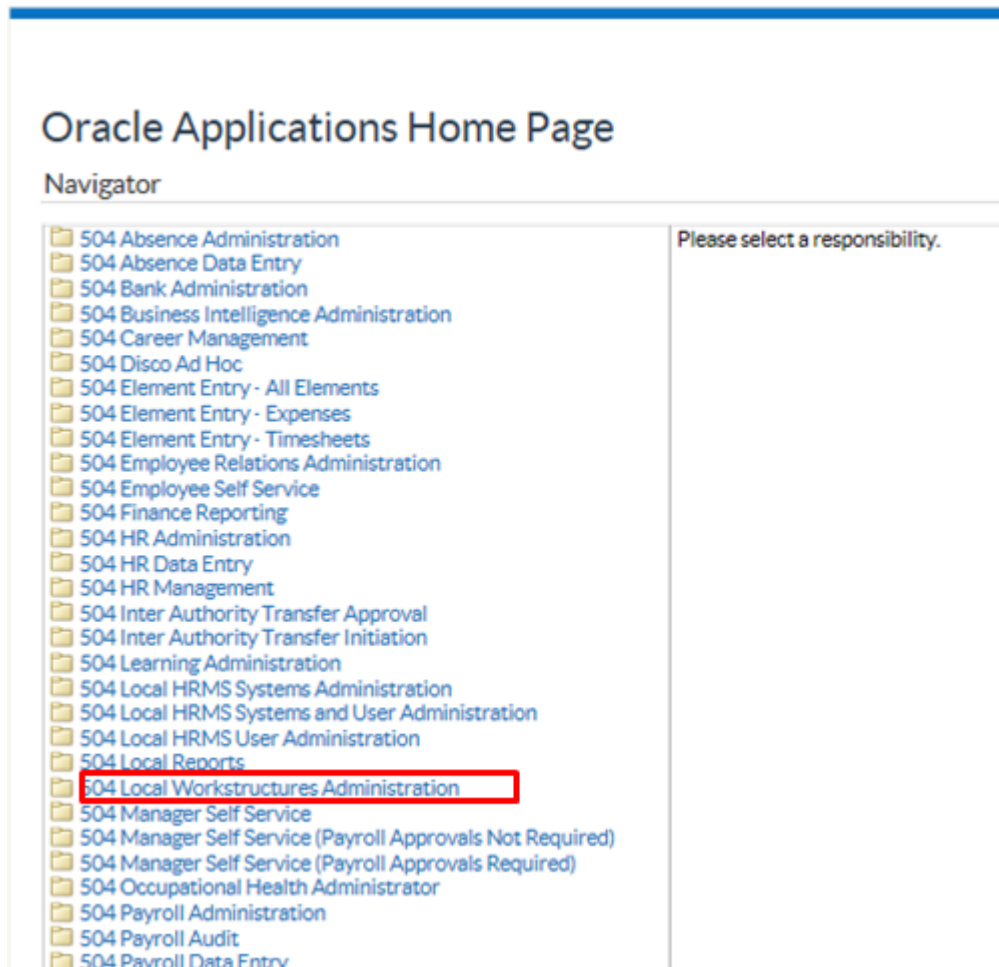


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### What it looks like

### Create an Organisation



Oracle Applications Home Page

Navigator

<ul style="list-style-type: none"><li>504 Absence Administration</li><li>504 Absence Data Entry</li><li>504 Bank Administration</li><li>504 Business Intelligence Administration</li><li>504 Career Management</li><li>504 Disco Ad Hoc</li><li>504 Element Entry - All Elements</li><li>504 Element Entry - Expenses</li><li>504 Element Entry - Timesheets</li><li>504 Employee Relations Administration</li><li>504 Employee Self Service</li><li>504 Finance Reporting</li><li>504 HR Administration</li><li>504 HR Data Entry</li><li>504 HR Management</li><li>504 Inter Authority Transfer Approval</li><li>504 Inter Authority Transfer Initiation</li><li>504 Learning Administration</li><li>504 Local HRMS Systems Administration</li><li>504 Local HRMS Systems and User Administration</li><li>504 Local HRMS User Administration</li><li>504 Local Reports</li><li><b>504 Local Workstructures Administration</b></li><li>504 Manager Self Service</li><li>504 Manager Self Service (Payroll Approvals Not Required)</li><li>504 Manager Self Service (Payroll Approvals Required)</li><li>504 Occupational Health Administrator</li><li>504 Payroll Administration</li><li>504 Payroll Audit</li><li>504 Payroll Data Entry</li></ul>	Please select a responsibility.
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Login to your user account and click on XXX Local Workstructures Administration.

# Workstructures

## Organisations



October 2017

It's your ESR

Oracle Applications Home Page

Navigator

<ul style="list-style-type: none"><li>504 Absence Administration</li><li>504 Absence Data Entry</li><li>504 Bank Administration</li><li>504 Business Intelligence Administration</li><li>504 Career Management</li><li>504 Disco Ad Hoc</li><li>504 Element Entry - All Elements</li><li>504 Element Entry - Expenses</li><li>504 Element Entry - Timesheets</li><li>504 Employee Relations Administration</li><li>504 Employee Self Service</li><li>504 Finance Reporting</li><li>504 HR Administration</li><li>504 HR Data Entry</li><li>504 HR Management</li><li>504 Inter Authority Transfer Approval</li><li>504 Inter Authority Transfer Initiation</li><li>504 Learning Administration</li><li>504 Local HRMS Systems Administration</li><li>504 Local HRMS Systems and User Administration</li><li>504 Local HRMS User Administration</li><li>504 Local Reports</li><li><u>504 Local Workstructures Administration</u></li><li>504 Manager Self Service</li><li>504 Manager Self Service (Payroll Approvals Not Required)</li><li>504 Manager Self Service (Payroll Approvals Required)</li><li>504 Occupational Health Administrator</li><li>504 Payroll Administration</li><li>504 Payroll Audit</li><li>504 Payroll Data Entry</li></ul>	<p><b>Organisation</b></p> <ul style="list-style-type: none"><li>Locations</li><li>Description</li><li>Hierarchy</li><li>Diagrammer</li></ul> <p><b>Position</b></p> <ul style="list-style-type: none"><li><b>Description</b></li><li>Mass Move</li><li>NHS Position Copy</li><li>NHS Mass Position Update</li></ul> <p><b>Workstructures</b></p> <ul style="list-style-type: none"><li>View Grade Description</li><li>View Pay Scale</li><li>View Point Values</li><li>View Grade Step</li><li>View Generic Rate Retrieval</li></ul> <p><b>Requests</b></p> <ul style="list-style-type: none"><li>Submit Request</li><li>View Request</li><li>Workflow Notifications</li></ul> <p><b>Business Intelligence</b></p> <ul style="list-style-type: none"><li>Business Intelligence</li></ul>
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Click on Description.

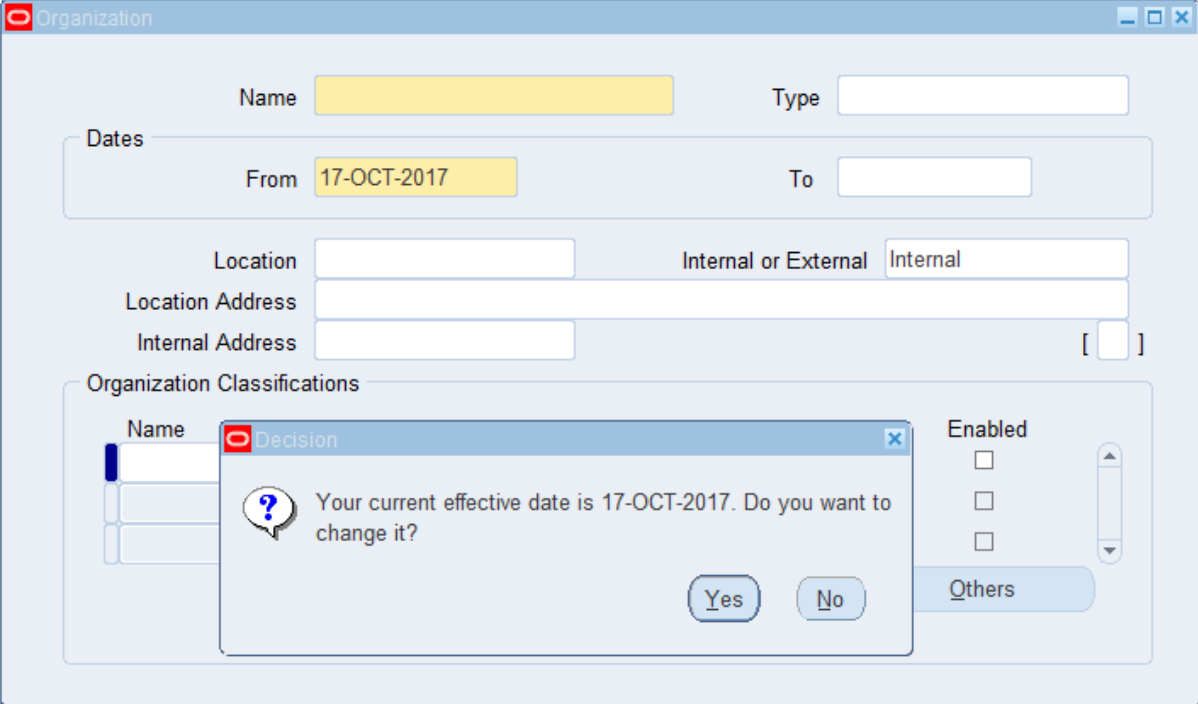
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## Organisations



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The screenshot shows a web-based form for creating or editing an organization. The form is titled "Organization" and contains several sections:

- Name:** A text input field.
- Type:** A dropdown menu.
- Dates:** A section with "From" and "To" date pickers. The "From" field is currently set to "17-OCT-2017".
- Location:** A text input field.
- Internal or External:** A dropdown menu currently set to "Internal".
- Location Address:** A text input field.
- Internal Address:** A text input field with a small icon to its right.
- Organization Classifications:** A section with a table of classifications. One classification is visible with the name "Decision".

A modal dialog box titled "Decision" is overlaid on the form. It contains a question mark icon and the text: "Your current effective date is 17-OCT-2017. Do you want to change it?". There are two buttons: "Yes" and "No".

Click No to accept the current effective date or click yes and change the date.

The From field will show the effective date for the Organisation. Positions cannot be attached to the new Organisation until after this date.

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## Organisations



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The screenshot shows the 'Organization' window with a 'Find Organization' dialog box open. The dialog box contains fields for Name, Type, and Location. Below these is the 'Organization Classification' section with a Name field and radio buttons for 'Enabled', 'Disabled', and 'Either'. At the bottom of the dialog are 'Clear', 'New (A)', and 'Find (B)' buttons. The 'New (A)' button is highlighted with a red box.

Click the new button and the Organisation form will automatically open.

The screenshot shows the 'Organization: 17-OCT-2017' window. The 'Name' field is highlighted in yellow and contains the text '504 Ward 15'. The 'From' date field is also highlighted in yellow and contains '17-OCT-2017'. Other fields include 'Type', 'Location', 'Location Address', 'Internal Address', and 'Internal or External' (set to 'Internal'). There is a section for 'Organization Classifications' with three rows, each having a 'Name' field and an 'Enabled' checkbox. An 'Others' button is at the bottom right.

Click in the name field and enter the new Organisation name. This is a free text field.


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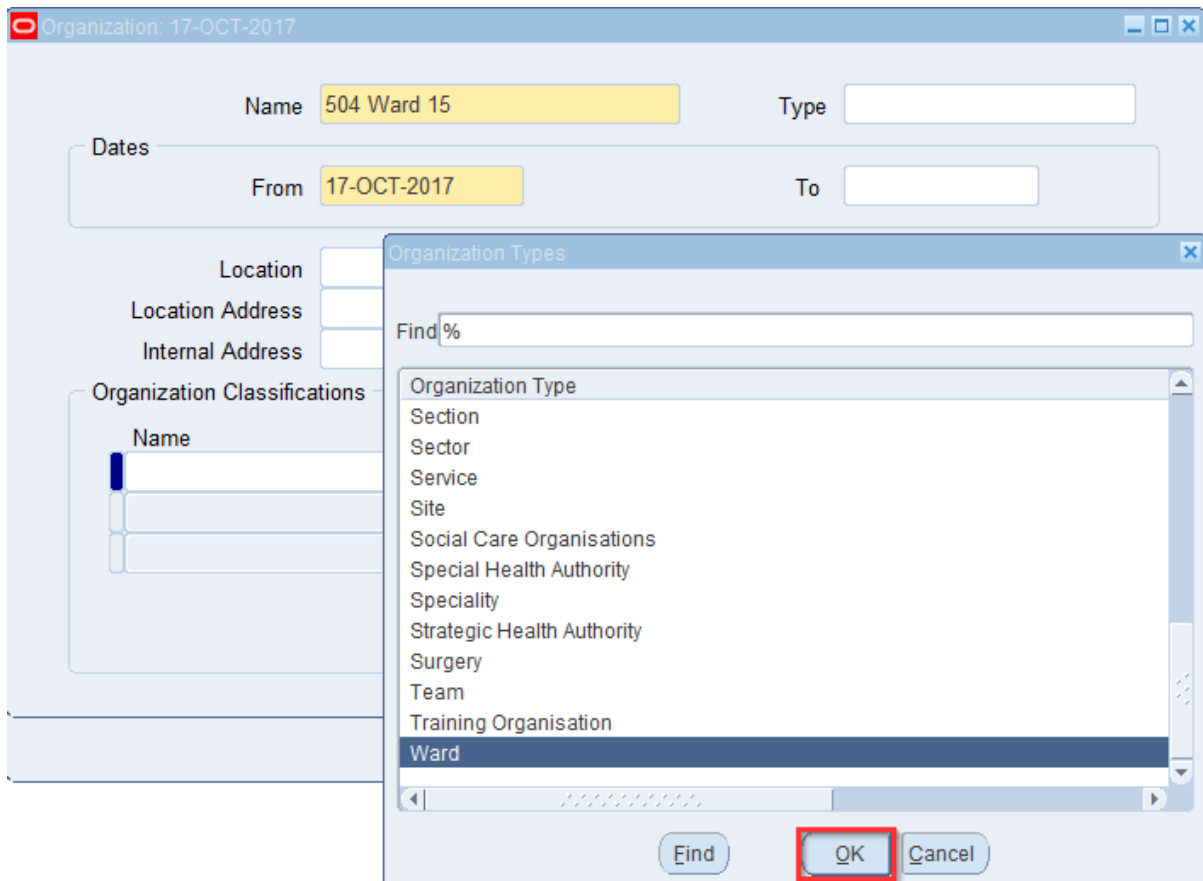
## Organisations



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-  The name must be prefixed with the unique 3 digit Employing Authority Identifier as this is key to ensuring they appear within the intended hierarchy. You should adopt Local Procedures for naming convention requirements.



The screenshot shows a software window titled "Organization: 17-OCT-2017". The main form has the following fields:

- Name: 504 Ward 15
- Type: (empty)
- Dates: From 17-OCT-2017, To: (empty)
- Location: (empty)
- Location Address: (empty)
- Internal Address: (empty)
- Organization Classifications: (empty)

An "Organization Types" dialog box is open over the main form. It has a search field "Find %" and a list of organization types:

- Organization Type
- Section
- Sector
- Service
- Site
- Social Care Organisations
- Special Health Authority
- Speciality
- Strategic Health Authority
- Surgery
- Team
- Training Organisation
- Ward

The "Ward" option is selected and highlighted. At the bottom of the dialog box, the "OK" button is highlighted with a red rectangle.

Click in the Type field select the Organisation Type and Click OK.

The location Internal or External field will automatically populate.

# Workstructures

## Organisations



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The screenshot shows the 'Organization: 17-OCT-2017' form with the following fields:

- Name: 504 Ward 15
- Type: Ward
- Dates: From 17-OCT-2017, To [empty]
- Location: [empty]
- Internal or External: Internal

A 'Locations' dialog box is open, showing a search bar and a table of locations:

Location	Description
104 ESR Hospital	ESR Hospital
504 ESR Hospital	ESR Hospital
504 zESR Project	

The 'OK' button in the dialog box is highlighted with a red box.

Click on the icon next to the Location field and select a location for the Organisation. Click on OK. You will need to save your work before continuing.



The location must have already been set up.

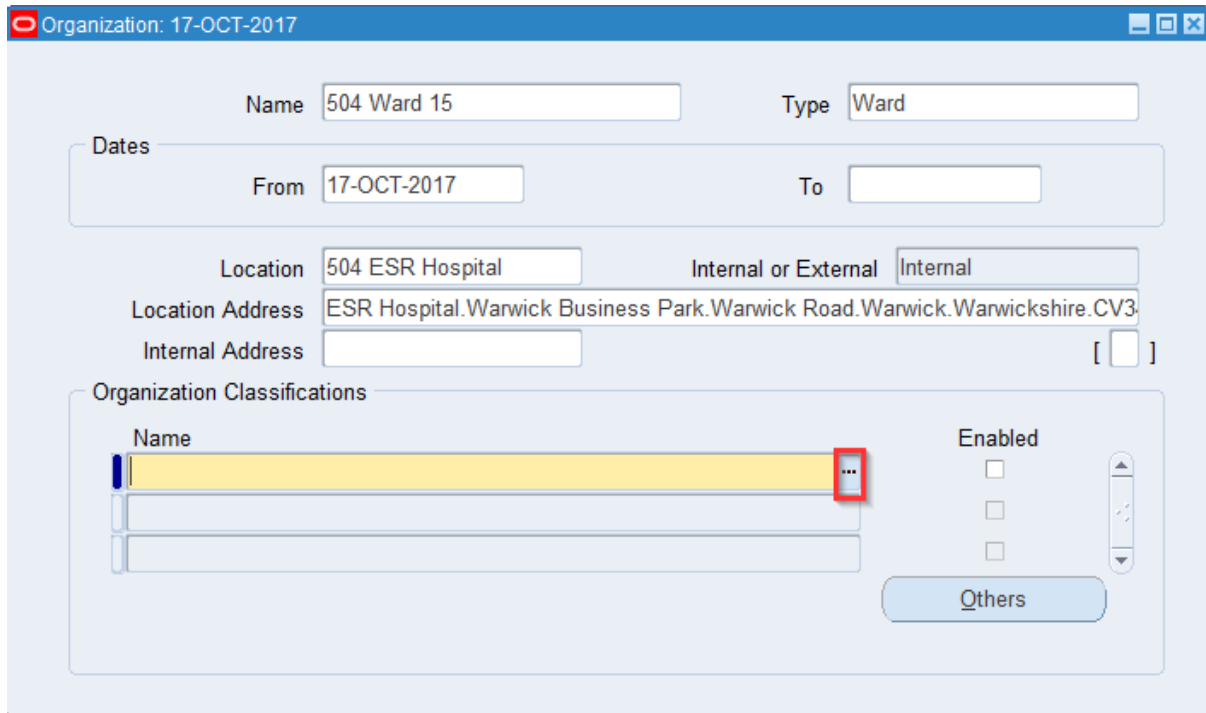
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## Organisations



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The screenshot shows a web form titled 'Organization: 17-OCT-2017'. The form contains several input fields and sections:

- Name:** 504 Ward 15
- Type:** Ward
- Dates:** From 17-OCT-2017, To (empty)
- Location:** 504 ESR Hospital
- Internal or External:** Internal
- Location Address:** ESR Hospital.Warwick Business Park.Warwick Road.Warwick.Warwickshire.CV3
- Internal Address:** (empty)
- Organization Classifications:** A table with columns 'Name' and 'Enabled'. The first row is highlighted in yellow and has a red box around an ellipsis icon. The 'Enabled' column has three unchecked checkboxes. Below the table is an 'Others' button.

Click on the icon next to the Name field.



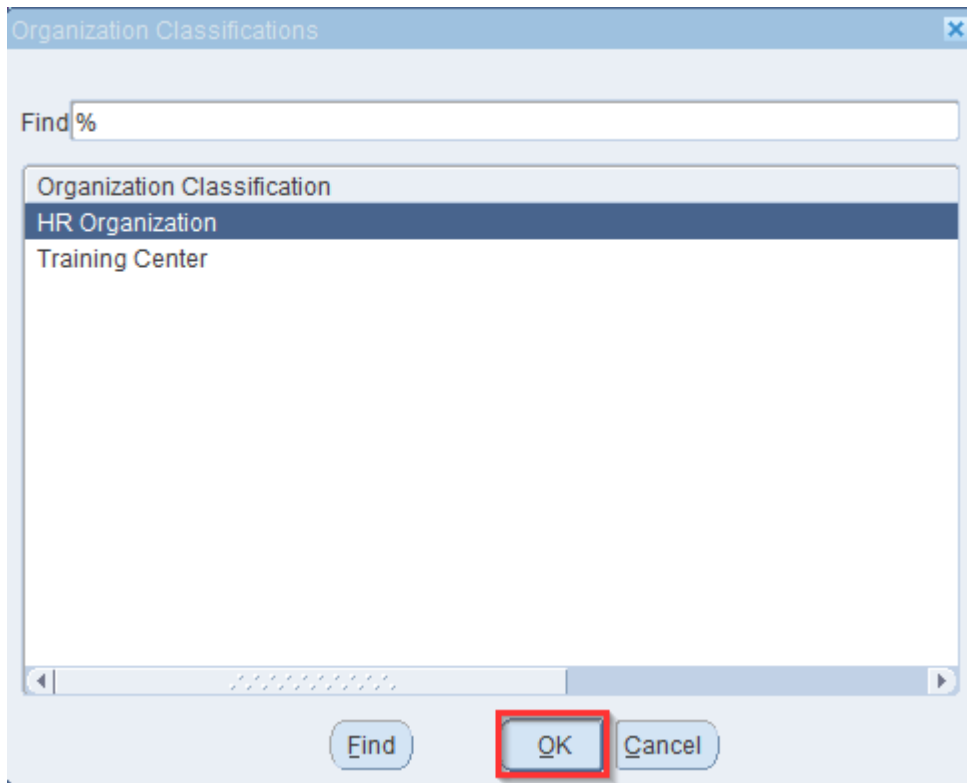
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## Organisations



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Select the Organisation Classification and click OK.

HR Organisation allows employees to be attached to an Organisation.



Training Centre indicates that the Organisation is used for training purposes.

More than one Organisation Classification (HR and Training Centre) can be attached to an Organisation.



The Training Centre name is used in OLM Auto Emails listed below:

- Joining Instructions
- Update of Class Details
- Cancellation of Class
- Withdrawal from a Class

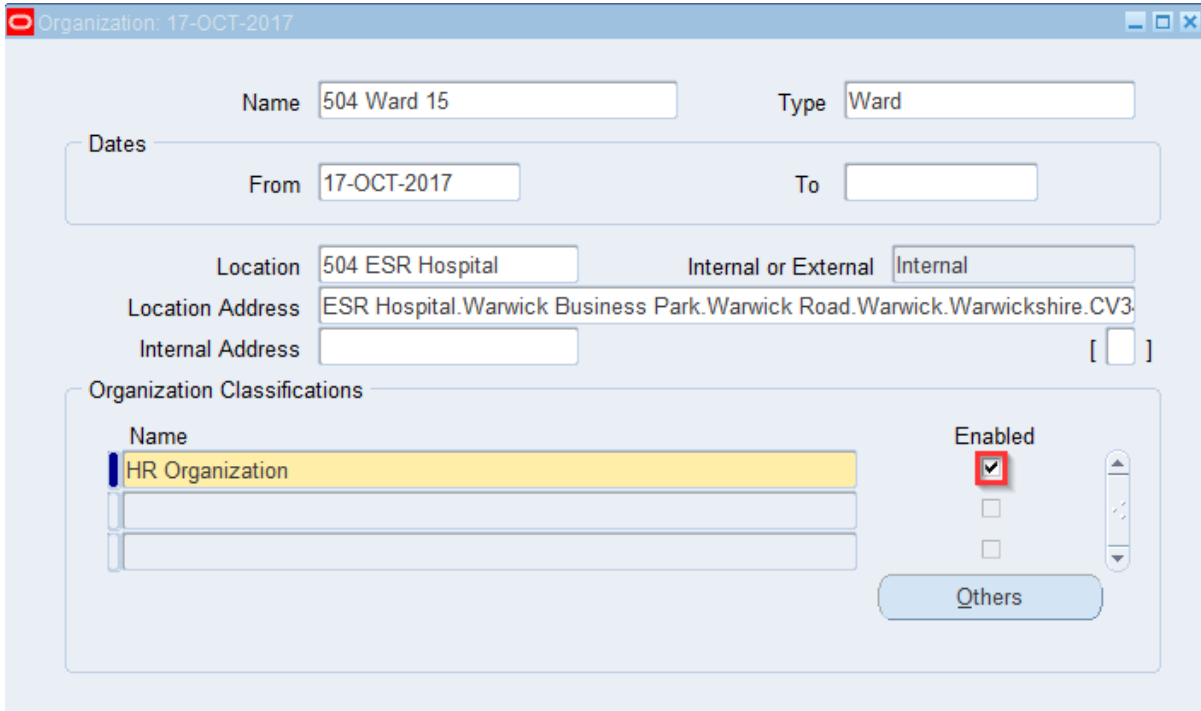
# Workstructures

## Organisations



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The screenshot shows a web form titled 'Organization: 17-OCT-2017'. The form contains the following fields and sections:

- Name:** 504 Ward 15
- Type:** Ward
- Dates:** From 17-OCT-2017, To (empty)
- Location:** 504 ESR Hospital
- Internal or External:** Internal
- Location Address:** ESR Hospital.Warwick Business Park.Warwick Road.Warwick.Warwickshire.CV3
- Internal Address:** (empty)
- Organization Classifications:** A table with columns 'Name' and 'Enabled'. The first row is 'HR Organization' with a checked 'Enabled' box. Below it are two empty rows. A button labeled 'Others' is at the bottom right of this section.

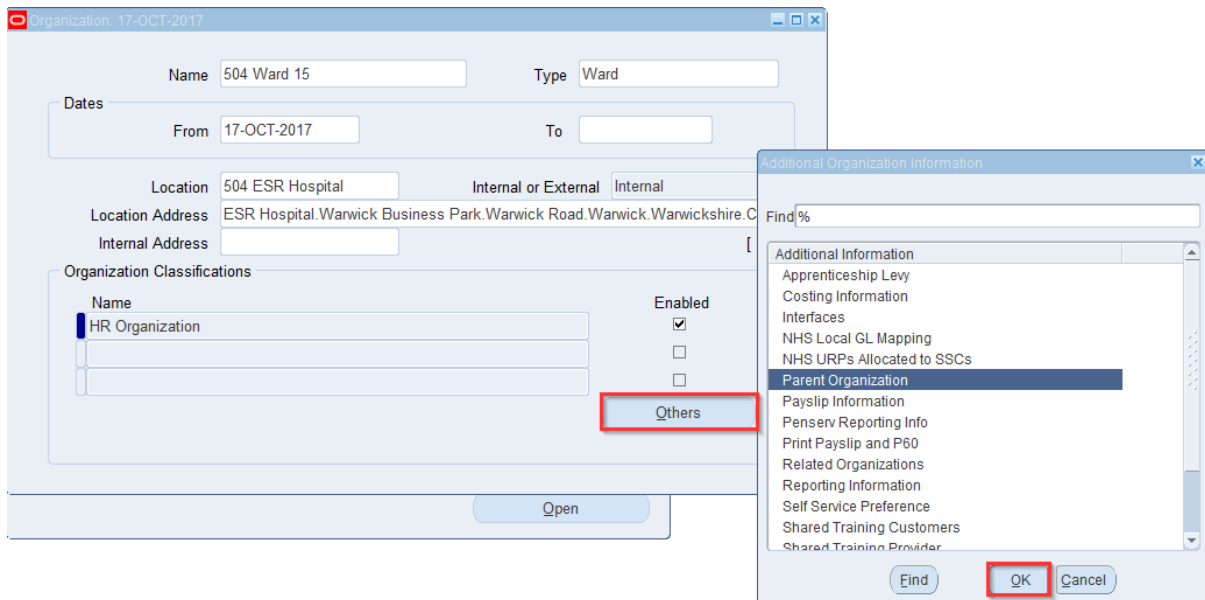
To enable the Organisation the Enabled box must be ticked. The Organisation has to be enabled before employees can be attached to it or it can be used as a training centre.



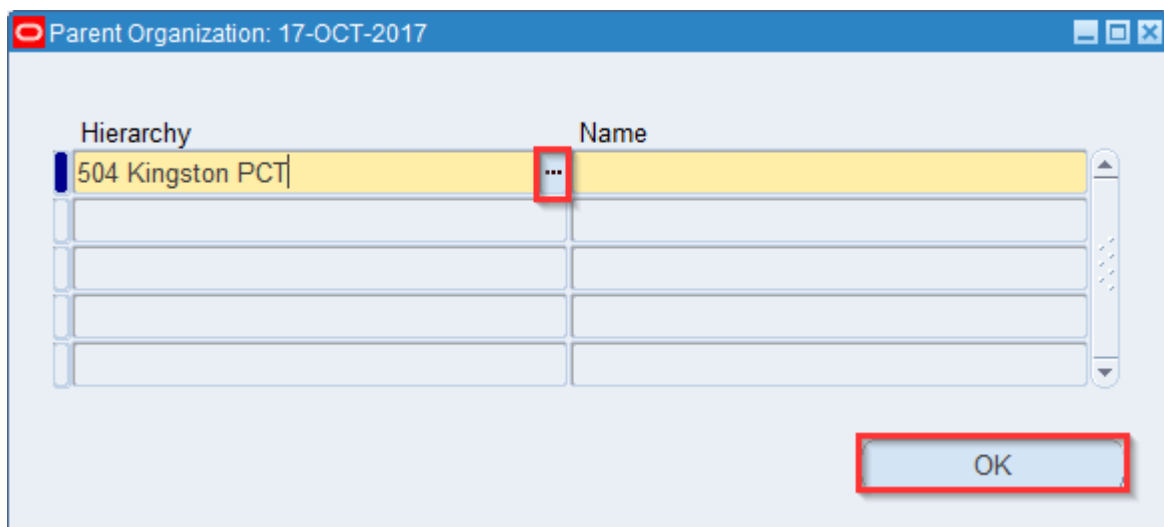
Once created the Organisation must be attached to a Parent Organisation within the existing Organisation Hierarchy. Any Organisation not attached will disappear when the next overnight process is run.

# Workstructures

## Organisations



To attach an Organisation to a Parent click on the Others button. Select Parent Organisation from the Additional Organisation Information drop down list of values and click OK.



Click on the icon next to the Hierarchy field. Select the name of the appropriate Hierarchy. If only one Hierarchy is available it will default into this field.

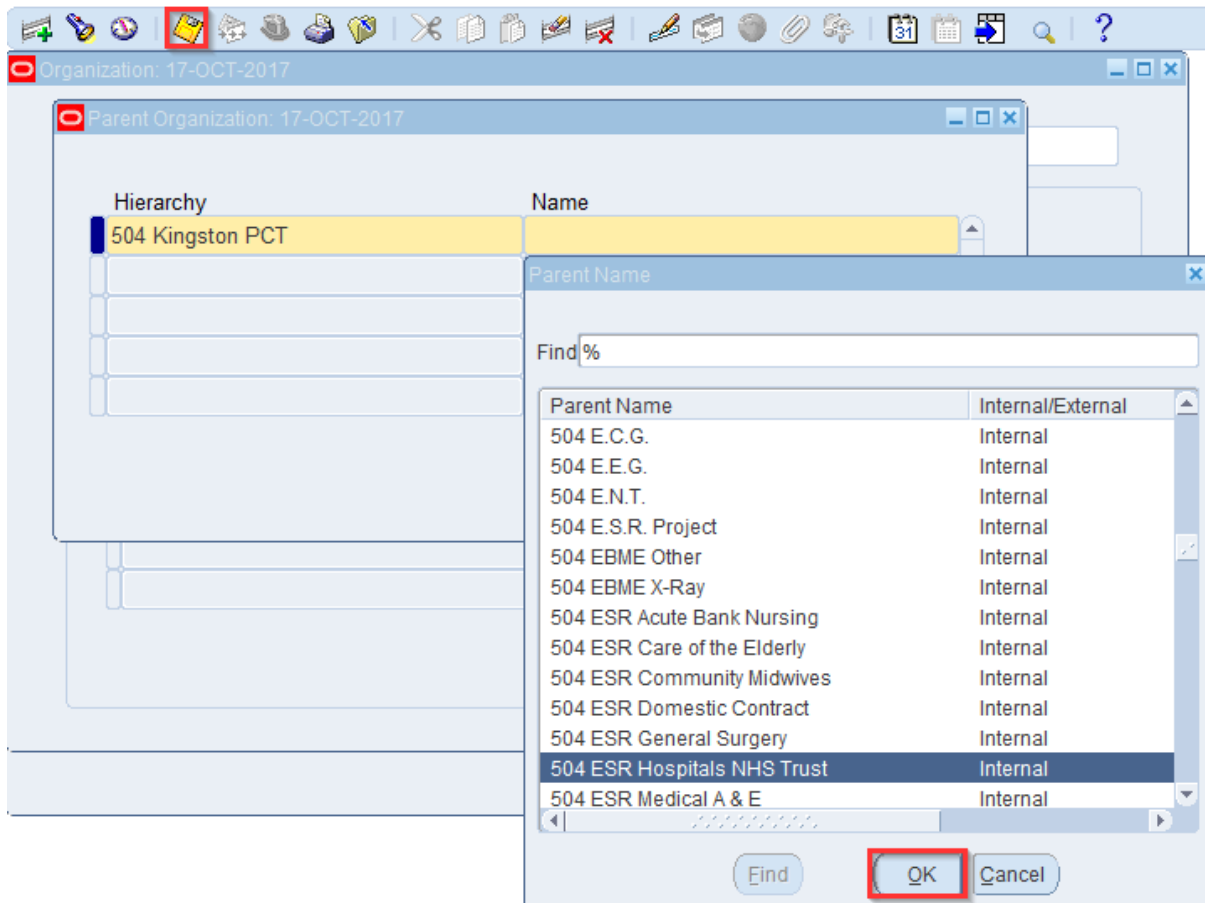
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## Organisations



October 2017

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Click in the Name Field and select the Parent Organisation. Click OK and save.

You will be taken back to the Organisation form.



Attaching the Organisation to a Parent Organisation will ensure that reporting requirements can be satisfied at all levels of the Trust.

# Workstructures

## Organisations



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Organization: 17-OCT-2017

Name: 504 Ward 15 Type: Ward

Dates: From: 17-OCT-2017 To:

Location: Internal: Warwick.Warwickshire.CV3

Organization: HR Org

Additional Organization Information

Find%

- Additional Information
- Apprenticeship Levy
- Costing Information
- Interfaces
- NHS Local GL Mapping
- NHS URPs Allocated to SSCs
- Parent Organization
- Payslip Information
- Penserv Reporting Info
- Print Payslip and P60
- Related Organizations
- Reporting Information
- Self Service Preference
- Shared Training Customers
- Shared Training Provider

Enabled

- 
- 
- 

Others

Find OK Cancel

Click on others, select Costing Information and click OK.

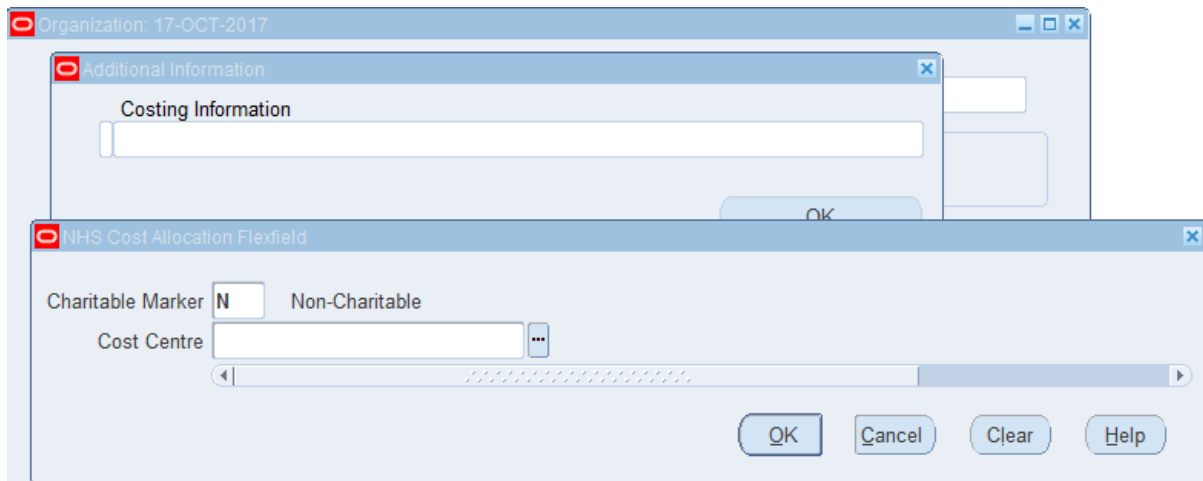
# Workstructures

## Organisations



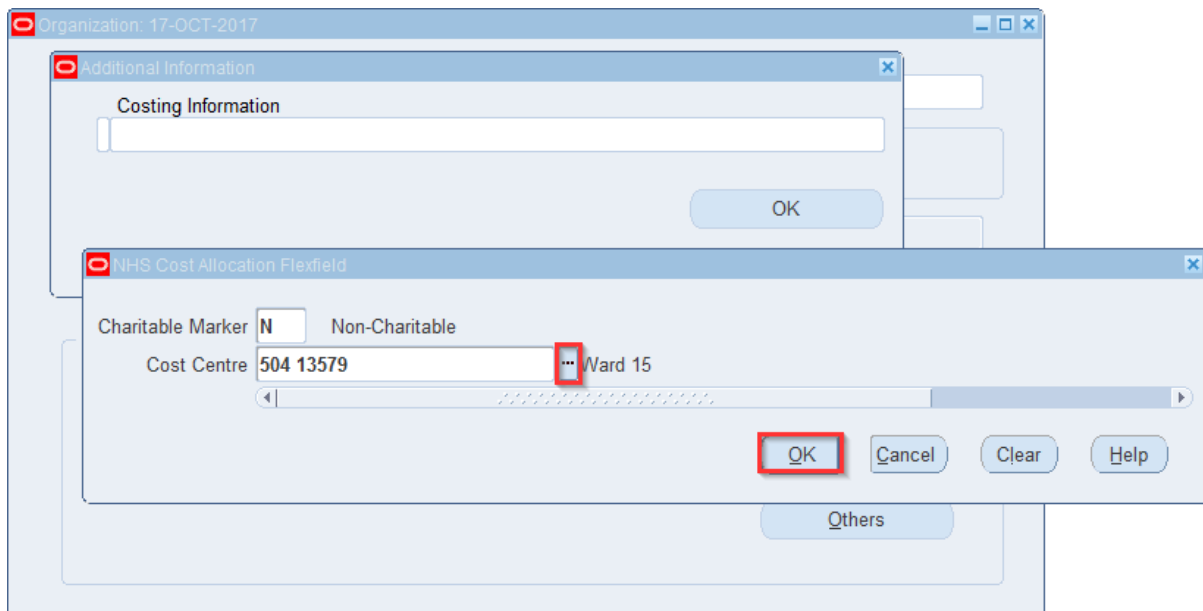
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Click into the Costing Information field and the NHS Cost Allocation Flexfield will open.

The Charitable Marker field will default to No. You can change this to Yes if appropriate.



Click on the icon next to the Cost Centre. Search for the relevant Cost Centre and click OK.

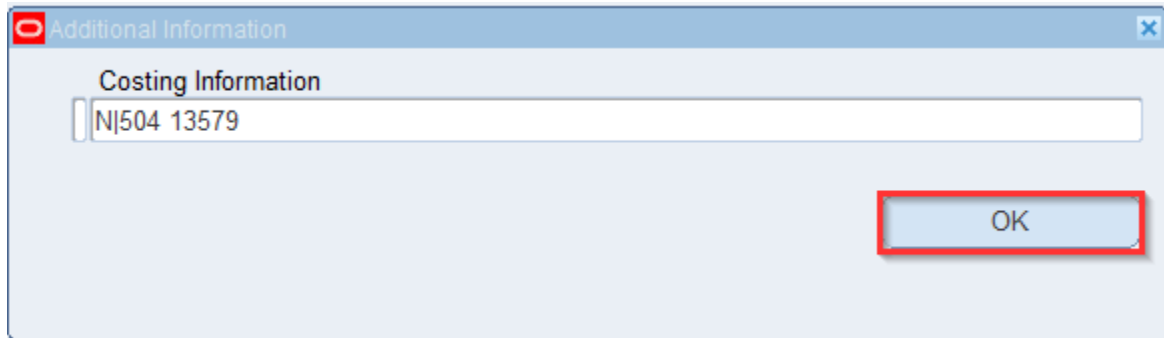
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## Organisations



October 2017

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Additional Information

Costing Information

N|504 13579

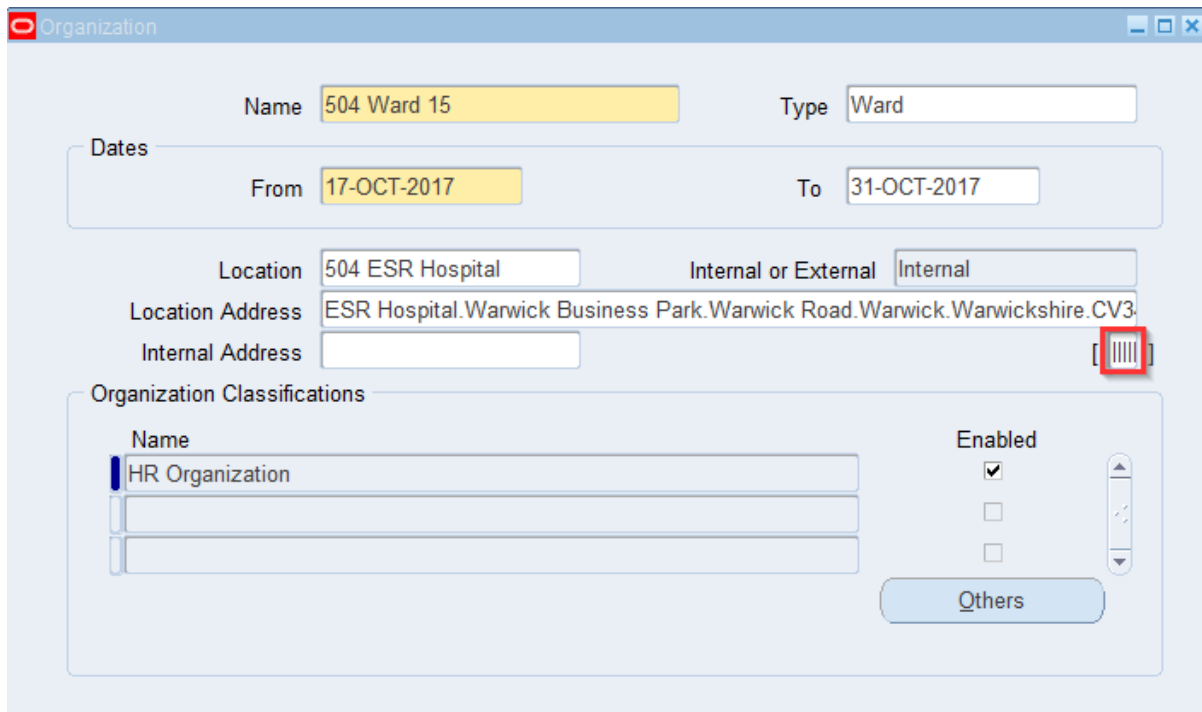
OK

Click OK.



Allocating Costing Information to an Organisation will ensure that associated employees will have this information defaulted to their assignment. This will mean accurate financial cost information can be applied during the costing process and reported on.

If an Organisation hosts employees for an external body this can be highlighted.



Organization

Name 504 Ward 15 Type Ward

Dates

From 17-OCT-2017 To 31-OCT-2017

Location 504 ESR Hospital Internal or External Internal

Location Address ESR Hospital.Warwick Business Park.Warwick Road.Warwick.Warwickshire.CV3

Internal Address [DFF icon]

Organization Classifications

Name	Enabled
HR Organization	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Others

Click in the DFF on the Organisation form.

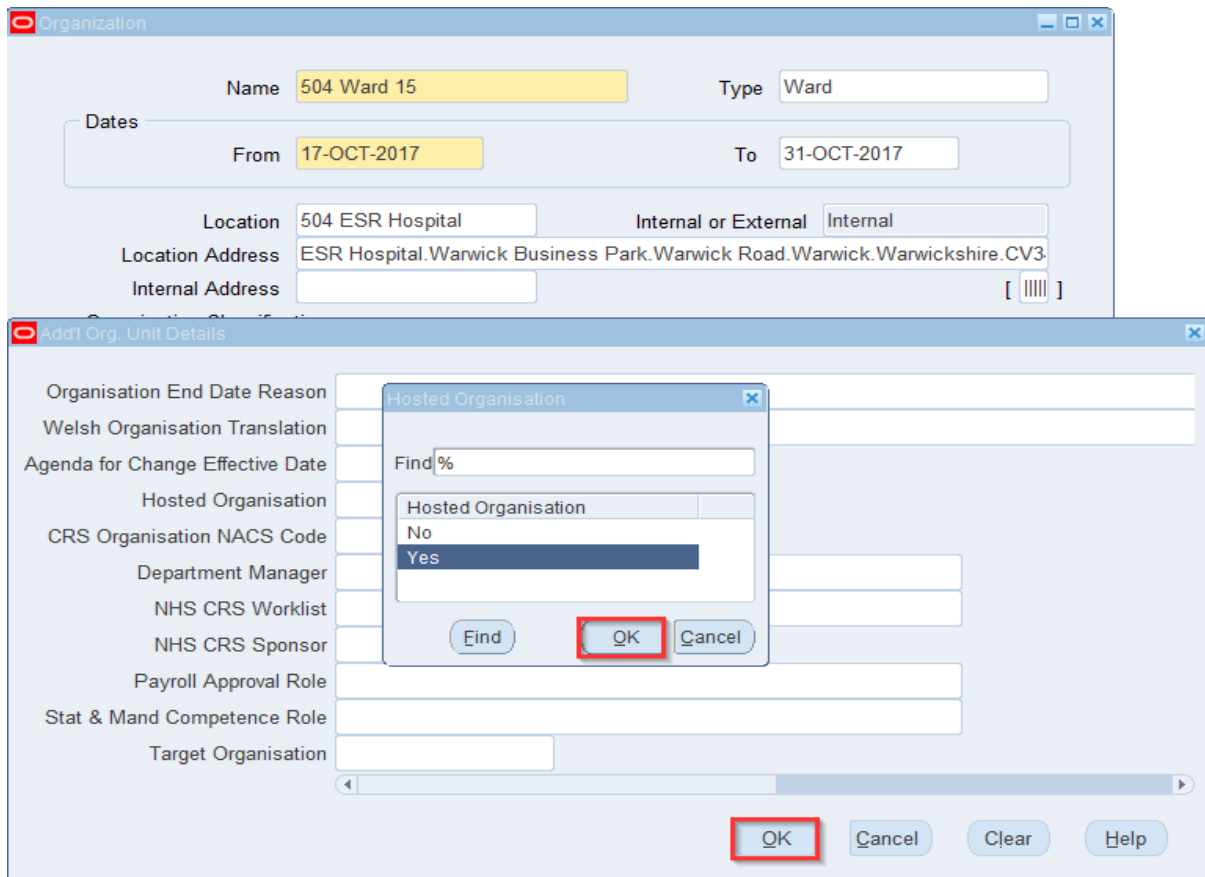
# Workstructures

## Organisations



October 2017

It's your ESR



Click in the Hosted Organisation field.

Select Yes and click OK. The Hosted Organisation form will close. Click OK to save.



Hosted Organisation information can then be counted separately from the Hosts total which may otherwise appear inflated. This is particularly important for Data Warehouse users to be able to identify correct workforce metrics.

Separate Organisations should be set up for Bank positions and Widowers:



- For Bank positions; so that Bank Administration module can locate them.
- For Widowers; to ensure correct headcount reporting as they will not be treated as employees.

For Widowers the Organisation Type should be Service so that they can be excluded from any employee workforce metrics.



# Workstructures

## Organisations

### End an Organisation

Populate the To Date field with the Organisation end date and click in the DFF to open the Additional Org. Unit Details.

You need to complete the Organisation End Date Reason and Click OK.



Organisations that are no longer required should be end dated rather than deleted, as this will ensure that historic reporting on the Organisation is possible. If an Organisation is deleted you will lose all historic information on an employee record, and it will not appear on any reports current or retrospective.

# Workstructures

## Organisations



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### Business Intelligence



The set-up of ESR Workstructures is crucial for meaningful and accurate reporting. If set-up correctly information is available for all levels of the Employing Authority hierarchy.

Dashboards on staff in post, turnover, compliance and absence management give HR Professionals and line manager's key information on their workforce in a simple and easy to use format. Drilling through to the detail below the headline information makes ESR BI essential to the HR and workforce management process.

### Further Information

Further information can be obtained from the links below:

#### Links

[ESR Website](#)

[ESR User Manual \(N3 Only\)](#)

[Kbase](#)

You can also contact your local ESR Account Manager or Functional Advisor (Details available on ESR Website)