Competence Bulk Upload and Replace

Introduction

This fact sheet covers the use of the competence bulk upload and replace processes in ESR.

Key Points

These processes are for making changes to employee Competence Profiles. Any changes to Competence Requirements are made using the Career Management URP. Assistance may also be available from the NHS Central Team by submitting an SR.

Further details in the Competence Requirements and Auto Subscription and Enrolment fact sheet.

Bulk Upload

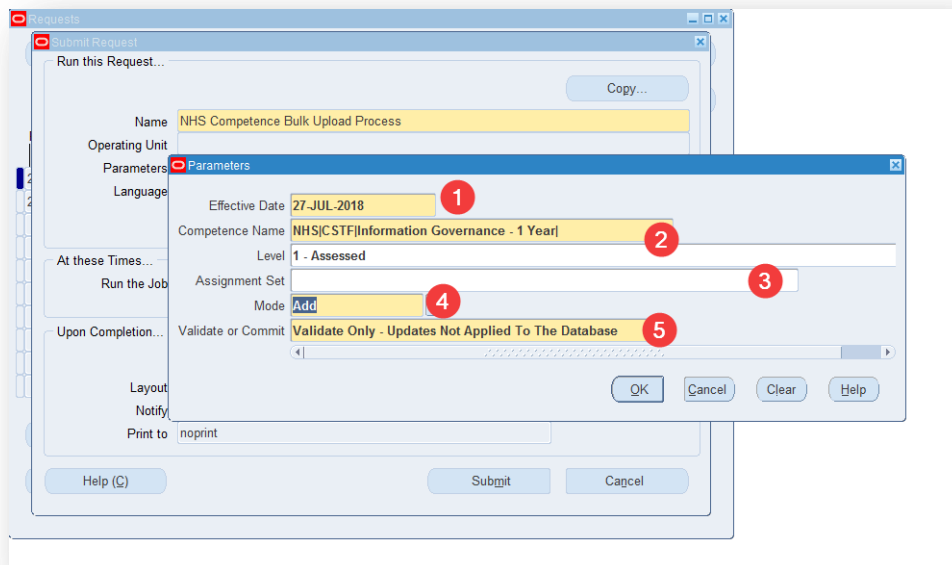This process is used for adding, end-dating, or purging competencies from employee records.

Reports - Submit Request - Single Request - Select Process

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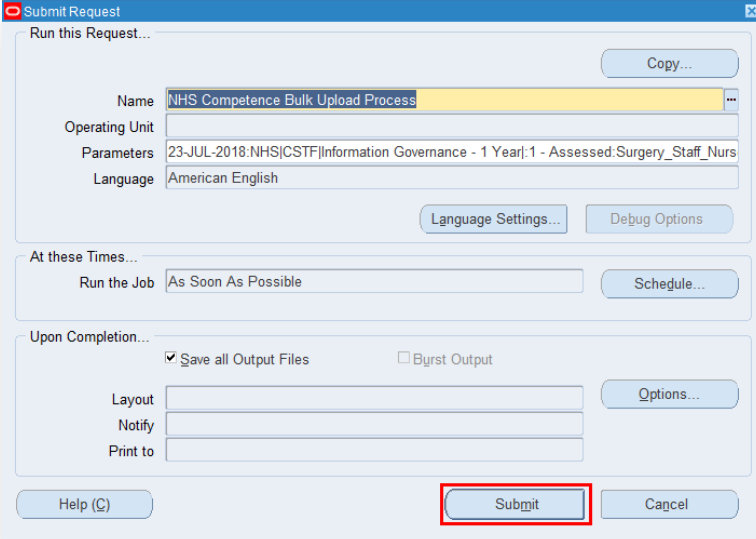
Parameters

1. Date from which the change will apply to the person competence profile as specified for the modes below.

2. Competence being uploaded, if you are only uploading certain Levels then the Competence Level value can be populated

3. An assignment set can be added if Competence is only being uploaded for certain staff

4. Mode can be Add, End-Date or Purge

    i.   Add – Will add the specified Competence to records from the Effective Date

    ii. End-Date – Will end date the specified Competence at the Effective Date specified for employees who have the competence and the existing Valid To date is greater than the date specified

    iii. Purge – Will remove the specified Competence at the Effective Date specified for employees who have the competence and the existing Valid To date is greater than the date specified

5. **Always run in Validate mode** to confirm what changes will be made before running in Validate and Commit Mode

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Click OK, click Submit
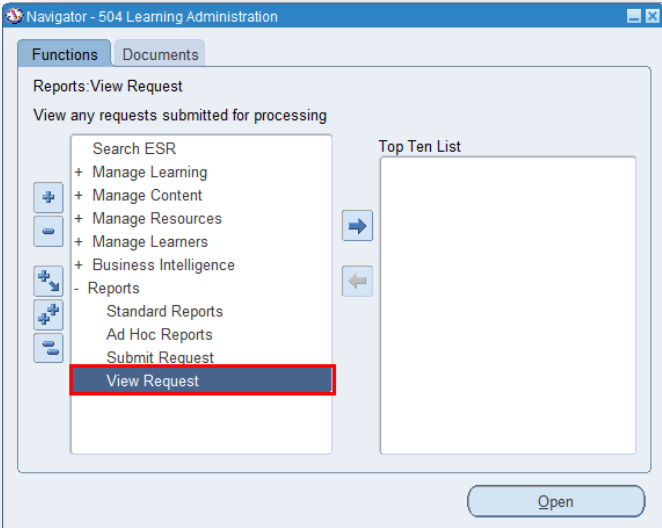
Viewing Log Files

Either wait for the process to complete or use the View Requests option

Find the correct process and click View Log to review log file in a new Internet Explorer tab.

If happy with results, click Rerun Request.

Change the parameters

Change mode to Validate and Commit and Submit again

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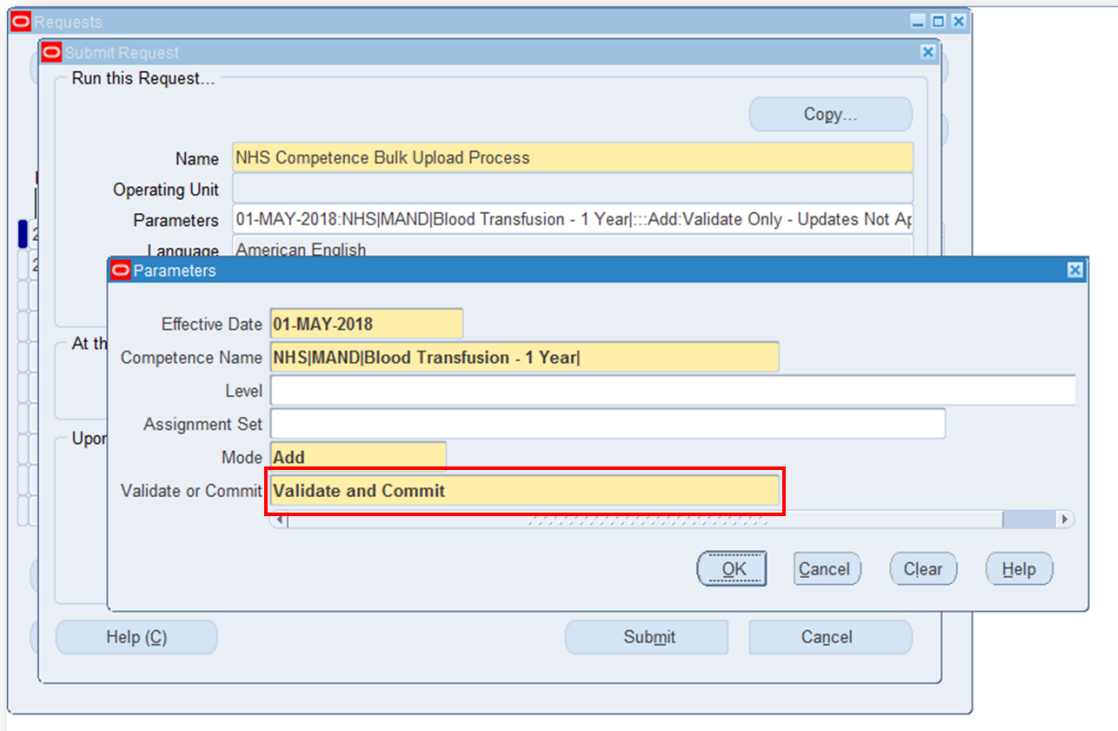
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Bulk Replace

This process is used for replacing one competency with another on employee records.

Reports - Submit Request - Single Request - Select Process
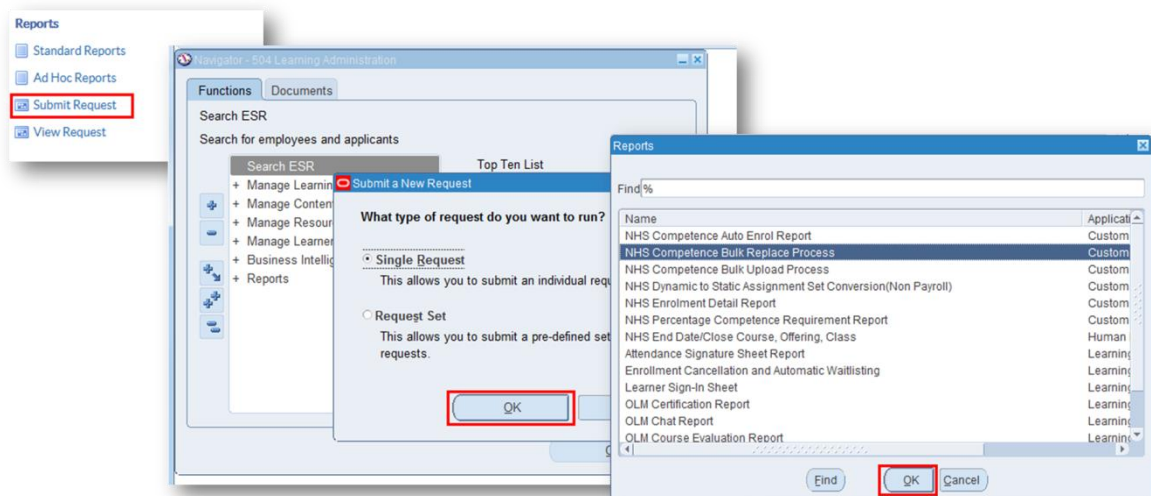
Parameters

1. Date Competence will be replaced

2. Competence being replaced, if you are only replacing certain Levels then the Old Competence Level value can be populated

3. Competence that is replacing the existing old Competence, if a Level is being assigned then this can be populated

4. An assignment set can be added if Competence is only being replaced for certain staff

5. **Always run in Validate mode** to confirm what changes will be made before running in Commit Mode

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Rules for Replacing

Old Competency	New Competency	New Competency End Data
No Fixed Term	No Fixed Term	No End Date
Fixed Term	No Fixed Term	No End Date
No Fixed Term	Fixed Term	New End Date
Fixed Term	Fixed Term	

IF the fixed term of the new competence is less than or equal to fixed term of the old competence THEN use the earlier of Old End Date and New End Date

IF the fixed term of the new competence is greater than the fixed term of the old competence THEN use the later of Old End Date and New End Date

Examples

The Date Last Awarded is used as the date to calculate the Valid To date when replacing one Fixed Term competency with another.

Old	Valid From	Valid To	New	Date Effective	Valid From	Valid To	Date Last Awarded
MAND|Information Governance No Renewal	01-JAN-2018		CSTF|Information Governance No Specified Renewal	01-AUG-2018	01-AUG-2018		
MAND|Information Governance 2 Years	01-JAN-2018	31-DEC-2020	CSTF|Information Governance No Specified Renewal	01-AUG-2018	01-AUG-2018		
MAND|Information Governance No Renewal	01-JAN-2018		CSTF|Information Governance 2 Years	01-AUG-2018	01-AUG-2018	31-JUL-2018	
MAND|Information Governance 2 Years	01-JAN-2017	31-DEC-2020	CSTF|Information Governance 1 Year	01-AUG-2018	01-AUG-2018	31-DEC-2018	01-JAN-2018
MAND|Information Governance 1 Year	01-JAN-2018	31-DEC-2018	CSTF|Information Governance 1 Year	01-AUG-2018	01-AUG-2018	31-DEC-2018	
MAND|Information Governance 1 Year	01-JAN-2017	31-DEC-2018	CSTF|Information Governance 2 Years	01-AUG-2018	01-AUG-2018	31-DEC-2019	01-JAN-2018

Assignment Sets

Assignment Sets can be used to make updates or replace competencies for specified staff rather than for all staff (this is when the Assignment set parameter is left blank).
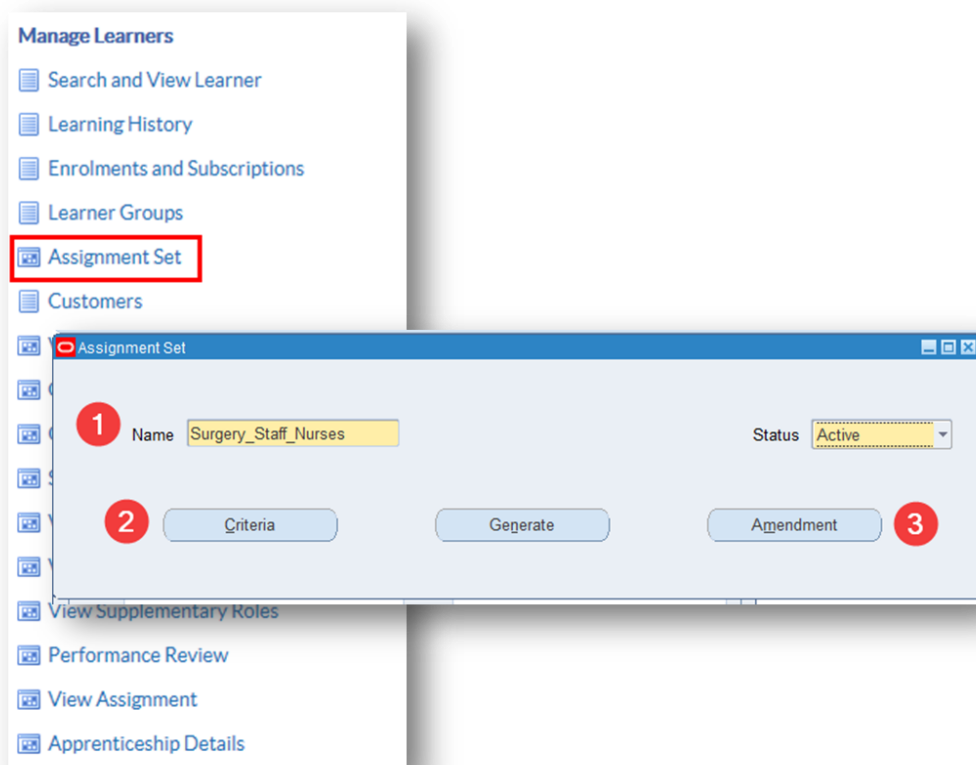
1. Name, cannot start with a number, no spaces

2. Criteria uses a formula to create the assignment set

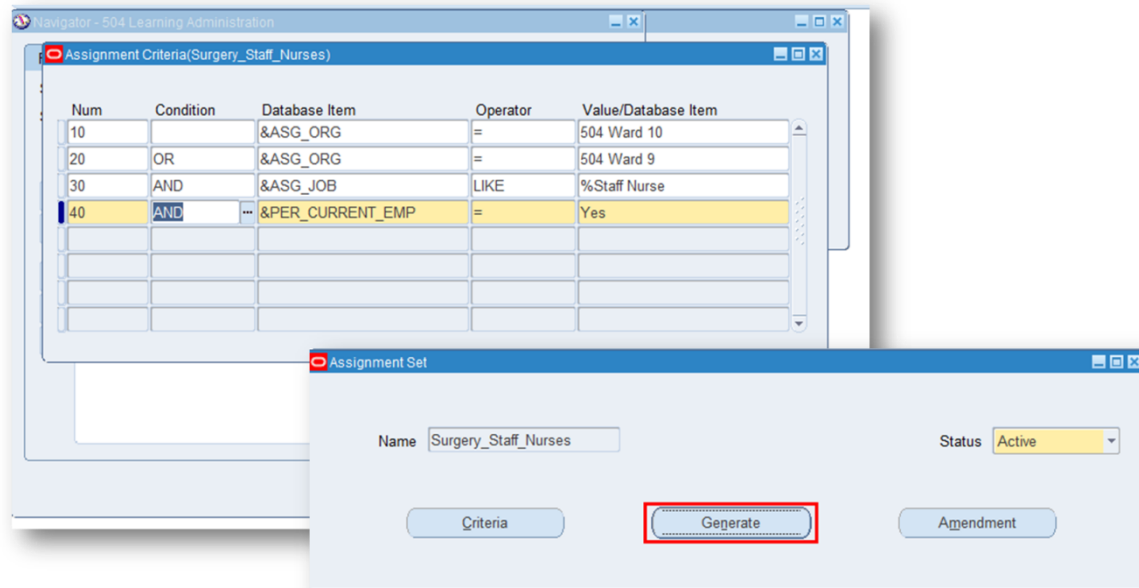3. Amendment uses employee names to create the assignment set

The recommended approach is to use Criteria as this will always create assignment sets based on current information

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Create Criteria

Criteria are created using

Common database items are listed below, a full list is available here.

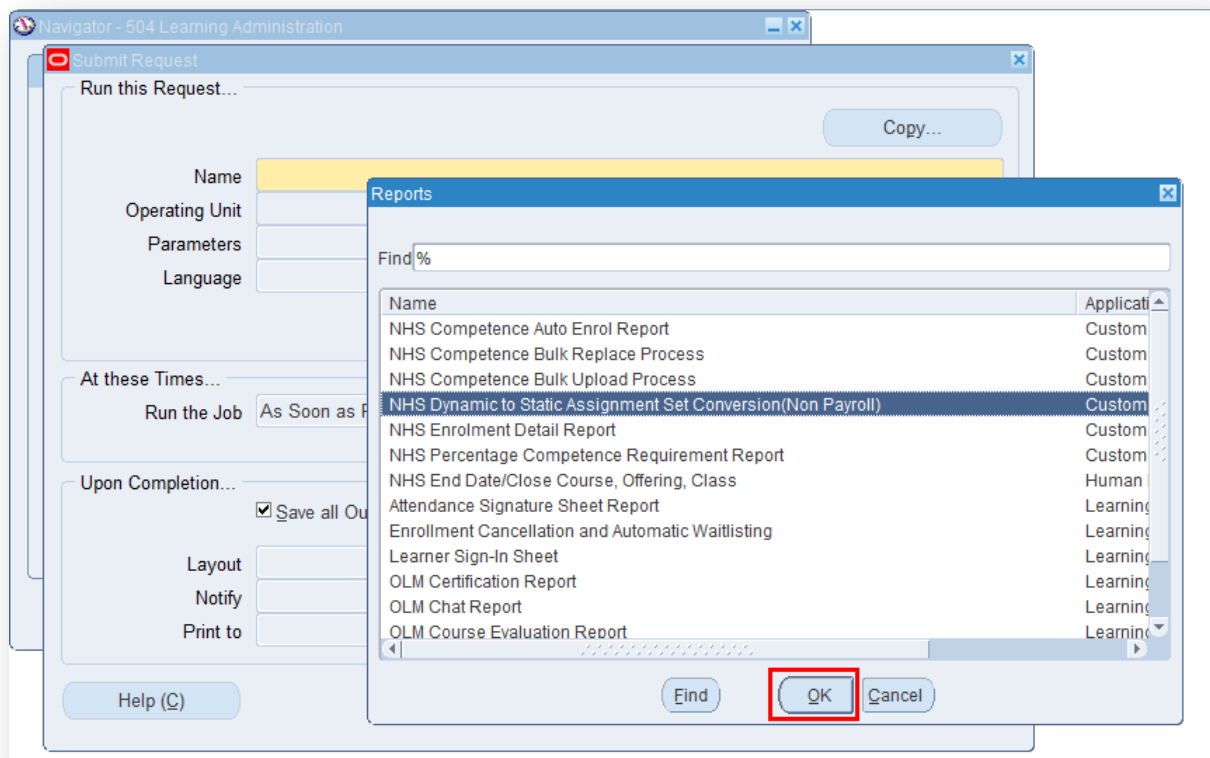| Database Item	Description
&ASG_JOB	Job Role
&ASG_ORG	Organisation
&ASG_POSTIION	Position
&PER_CURRENT_EMP	Current Employer

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Convert to Static Assignment Set

Before the assignment set can be used in the bulk processes it needs to be converted to a static list.

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Parameters

1. Records must meet the criteria specified at the effective date

2. The Assignment Set to be converted to a static list

3. The Assignment Set that must be used in the Assignment Set parameter in the Bulk Upload/Replace process.

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Viewing the Records Included

Click the Export button in the Assignment Set toolbar.
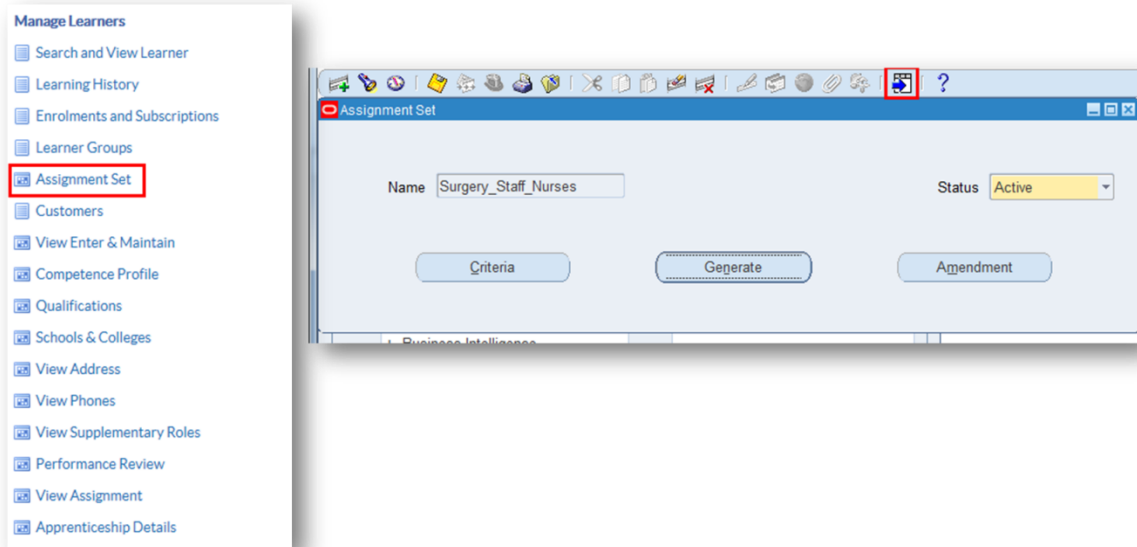
Click Next and open spreadsheet to view included records.

You must enable macros.