

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0259 - GUIDE TO ESRBI POSITION ANALYSIS DASHBOARD

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# DOCUMENT CONTROL

## CHANGE RECORD

Date	Author	Version	Change Reference
25/01/2017	Matt Madya	0.1	Initial Draft
03/03/2017	Matt Madya	1.0	Initial Release
03/04/2017	Matt Madya	2.0	Updated following new ESRBI developments
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22/03/2021	Matt Madya	11.0	Annual Review
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## DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

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## Design Assumptions

The following design assumptions have been made and can be applied to all analyses and dashboards:

1. All analyses have an export button to enable the user to export to their format of choice.
2. All analyses have an 'Add to Briefing Book' button enabled to allow the user to group national analyses together into a board-report type document.
3. All dashboards are designed on a screen resolution of 1024 x 768 pixels to prevent horizontal scroll bars being displayed (except where wide tables of data are required).

## Examples

Where applicable, the examples included in this document contain fictional data only. The names and other personal details are fictional although look realistic enough to provide a useful example.

## Position Analysis Dashboard

### Description

This dashboard is designed to provide the user with information around positions created within workstructures as at a specified effective date.

### Allocation

This dashboard is available to the following URPs:

XXX BI Administration  
XXX Finance Reporting  
XXX Finance Reporting and Hub Mapping  
XXX HR Administration  
XXX HR Administration (With RA)  
XXX HR Management  
XXX Local Workstructures Administration

## Summary Tab

### Description

This analysis provides authorised users with position related information at a summary level as at the user specified effective date. This includes FTE and Headcount variance reporting.

### Prompts

Organisation  
Cost Centre  
Subjective Code  
Staff Group  
Position Type  
Position Grade Description  
Occupation Code  
Hiring Status  
Short Term Supernumerary  
Effective Date  
Organisation Level 1-13  
Cost Centre Organisation Level 1-12  
Show only positions where position has been vacant for previous X Days where X =

### Column Selectors

Cost Centre and Organisation Level 1-13

### Data Items

Position Number	Management Cost
Position Title	Hiring Status
Staff Group	Hiring Status Start Date
Role	Hiring Status Proposed End Date

Grade	Short Term Supernumerary
Organisation	FTE Budgeted
Cost Centre	FTE Actual
Subjective Code	FTE Variance
Occupation Code	Headcount Budgeted
Working Hours	Headcount Actual
Working Hours Frequency	Organisation Level 1-13
Cost Centre Organisation Level 1-13	Area of Work
Position Type	Location Name
Contract Type	Frontline Healthcare Worker

### Example Screenshot

Position	Position Name	Staff Group	Role	Grade	Organisation	Cost Centre	Subjective Code	Occupation Code	Working Hours
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Advanced Practitioner	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Clinical Psychologist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2L	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Clinical Psychologist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2L	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Clinical Psychologist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S5L	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Clinical Psychologist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	SAL	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Clinical Psychologist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	SAL	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S0P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S0P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2P	37.5
00000000	00000000 BI Analyst B2A Data	Add Prof Scientific and Technic	Pharmacist	XN06 Non Review Body Band 6	000 Organisation	000M000	0000K000	S2P	37.5

## Detail Tab

### Description

This analysis provides authorised users with detailed information regarding both occupied and vacant positions within ESR.

### Prompts

Organisation(s)

Cost Centre

Staff Group(s)

Assignment Category

Person Type(s)

Employee Person Type(s)

Assignment Status

Occupation Code

Pay Grade(s)

Job Sharer

Primary Assignments Only

Position

Position Type

Hiring Status

Short Term Supernumerary

Subjective Code

Workplace Org Code

Workplace Org Name  
Effective Date

### *View Selectors*

Table

Table (inc. Interface)

### *Data Items*

Cost Centre	Position Effective Start Date
Organisation	Position Effective End Date
Position	Management Cost
Position Name	Hiring Status
Position Type	Hiring Status Start Date
Deanery Post Number	Hiring Status Proposed End Date
Care Group	EPP Post
Title	DBS Disclosure Type
Initials	Adult Barred List Check Required
First Name	Child Barred List Check Required
Last Name	Eligible for OH Processing
Role	Short Term Supernumerary
Staff Group	Workplace Org Code
Latest Hire Date	Workplace Org Name
Pay Grade	CRS Position Name 1
Pay Grade Description	CRS Position Description 1
Grade Effective Start Date	CRS Position Name 2
Assignment Number	CRS Position Description 2
Assignment Start Date	CRS Position Name 3
Assignment End Date	CRS Position Description 3
Assignment Category	CRS Position Name 4
Assignment FTE	CRS Position Description 4
FTE Start Date	CRS Position Name 5
FTE End Date	CRS Position Description 5
Subjective Code	CRS Position Name 6
Position Grade Description	CRS Position Description 6
Occupation Code	CRS Position Name 7
Working Hours	CRS Position Description 7
Working Hours Frequency	CRS Position Name 8
Cost Centre Organisation Level 1-12	CRS Position Description 8
Organisation Level 1-13	Area of Work
Frontline Healthcare Worker (Position)	Frontline Healthcare Worker (Assignment)
Interface (Table Inc. Interface view only)	

## Organisation Summary Tab

### Description

This analysis provides authorised users with organisation related information at summary level.

### Data Items

Organisation	Staff Group
Org L1-13	Department Manager
Cost Centre	Department Payslip Delivery Point
cc Org L1-12	FTE Budgeted
Organisation Type	FTE Actual
Occupation Code	FTE Variance

### Example Screenshot

Organisation	Cost Centre	Department Manager	Department Payslip Delivery Point	Organization Type	FTE Budgeted	FTE Actual	FTE Variance
504 Haemochem Pathology	504D1610			Department	7.49		-7.49
504 Microbiology	504D1580			Department	2.35		-2.35
504 Pathology	504D1575			Section	1.08		-1.08
504 Pathology General	504D1575			Department	11.29		-11.29

## Organisation Detail Tab

### Description

This analysis provides authorised users with detailed organisation related information.

### Data Items

Title	Costing End Date
Initials	Asg Cost Centre
Last Name	Subjective Code
Employee Number	Sub Analysis1
Assignment Number	Sub Analysis2
Progression Point Value	Charitable Marker
FTE	Hiring Status
Working Hours	Hiring Status Start Date
Working Hours Frequency	Hiring Status Proposed End Date
Organisation	EPP Post
Location	Eligible for OH Processing
Staff Group	NHS CRS Sponsor Employee Number
Role	NHS CRS Sponsor
Position	NACS Code
Pay Scale	NACS Code Description
Payroll CC Entity	NHS CRS Worklist Description
Org Cost Centre	NHS CRS Worklist Name
Proportion	Short Term Supernumerary
Costing Start Date	Deanery Post Number
Care Group	



## Example Screenshot

Title	Initials	Last Name	Employee Number	Assignment Number	Progression Point Value	FTE	Working Hours	Working Hours Frequency	Location	Staff Group	Role	Position
Dr	J	Blogs	00000000	00000000	000	0.00	10.0	Sessions/Week	Default Home	Administrative and Clerical	Officer	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	10.0	Sessions/Week	Default Home	Medical and Dental	Consultant	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate
Dr	J	Blogs	00000000	00000000	000	0.00	11.0	Week	Default Home	Medical and Dental	Trust Grade Doctor - Specialty Registrar	0000000 Director 000 Corporate

## Medical & Dental Tab

### Description

This analysis shows the unique deanery post numbers assigned to position numbers in ESR. Deanery Post Numbers are highlighted where they are entered against more than one position. These should be checked and corrected if necessary.

### Prompts

Effective Date

Position Number

Hiring Status

Deanery Post Number

Managing Deanery Body

### Data Items

Organisation	Deanery Post Number
Position Number	Managing Deanery Body
Position Name	Host/Lead Employer

## Example Screenshot

Organisation	Position Number	Position Name	Deanery Post Number	Managing Deanery Body	Host/Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer
000 NHS ESR Organisation	10002000	000000 Specialty Registrar A2B Clinical Oncology	NHS/N0010/010/STRH/001	NHS	Lead Employer