NHS ELECTRONIC STAFF RECORD

ESR-NHS0276 - GUIDE TO ESRBI TRAVEL AND SUBSISTENCE DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
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DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
02/05/2018	Matt Madya	0.1	Initial Draft
15/10/2018	Matt Madya	1.0	Initial Release
19/11/2018	Matt Madya	2.0	Updated following new ESRBI developments
10/06/2019	Matt Madya	3.0	Updated to correct a formatting issue
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01/03/2025	Matt Madya	9.0	Annual Review

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DISTRIBUTION

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1	Library Master	Project Library
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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.

Travel And Subsistence Dashboard

Description

The dashboard provides authorised reporting users with information to capture personal and claim details for employees, and detail claims made or paid within a particular payroll period.

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 Recruitment & Applicant Enrolment Administration

XXX Recruitment & Applicant Enrolment Data Entry

XXX Recruitment Data Entry

XXX Payroll Administration

XXX Payroll Audit

XXX Payroll Super Administration

Claimant Details

Description

This analysis provides authorised reporting users with information in order to detail claims made or paid within a particular payroll period.

Prompts

* Organisation Hierarchy

Payroll

Paid in Period

User Type

Expense Element

Employee Number

Supervisor

Claim Date Between

Data Items

Employee Number	Vehicle Engine cc
Employee Name	Vehicle Registration
Org L1-L13	Vehicle Fuel Type
Cost Centre Org L1-L13	Vehicle Shared
Home Address	Expense Element
Driving Licence Number	Allowance Type

Valid Insurance Cover	Miles Claimed
Insurance Renewal Date	Days Paid
Assignment Number	Unit Rate
Assignment Location	Claim From
Supervisor	Claim To
Job	Paid in Period
User Type	Value
Vehicle Make and Model	

Example Screenshot

Cumulative Cost

Description

This analysis enables authorised users to analyse travel claims in order to optimise the trust's employee Expense User Type categories and further reduce the cost of travel.

Prompts

* Organisation Hierarchy
Payroll
Paid in Period
Claim From Date >=
Claim To Date <=
Employee Number

Data Items

Financial Code	Travel Paid £'s
Employee Number	Employers NI(Travel)
Assignment Number	Travel Paid Miles
Employee Name	Subsistence Paid £'s
Org L1-L13	Employers NI(Subsistence)
Cost Centre Org L1-L13	User Type
Organisation	Vehicle Registration
Payroll Period	

Example Screenshot

Financial Code	Assignment	Employee Name	Organisation	Payroll Period	Travel Paid £'s	Employers NI(Travel)	Travel Paid Miles	Subsistence Paid £'s	Employers NI(Subsis
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2014 Week	26.80	0.00	0	0.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2015 Week	206.63	11.63	0	0.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2016 Week	457.81	18.07	0	10.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2018 Week	135.45	0.00	301	0.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	1 2018 Week	35.00	2.83	125	0.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2013 Week	418.73	5.72	0	205.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2014 Week	118.80	4.00	0	55.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2015 Week	59.19	2.88	0	5.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	10 2016 Week	69.75	0.00	0	0.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	11 2014 Week	0.00		0	115.00	
NHS||N||000N000||NHS0000||||0000	12345678	Blogs, Mr. Joe	000 NHS ESR Organisation	11 2015 Week	0.00		0	100.00	