

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0302 - GUIDE TO ESRBI USER ADMINISTRATION DASHBOARD

Information Classification: PUBLIC

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# DOCUMENT CONTROL

## CHANGE RECORD

Date	Author	Version	Change Reference
29/03/2019	Matt Madya	0.1	Initial Draft
14/05/2019	Matt Madya	1.0	Initial Release
10/06/2019	Matt Madya	2.0	Updated to correct a formatting issue
26/07/2019	Matt Madya	3.0	Updated following new ESRBI developments
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12/02/2021	Matt Madya	5.0	Updated following new ESRBI developments
01/04/2022	Matt Madya	6.0	Annual Review
16/05/2023	Matt Madya	7.0	Updated following new ESRBI developments
25/08/2023	Matt Madya	8.0	Updated following new ESRBI developments
01/07/2024	Matt Madya	9.0	Annual Review

## REVIEWERS

Name	Position
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## DISTRIBUTION

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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.

## User Administration Dashboard

### *Description*

This dashboard enables users to report the responsibilities of users i.e. summary and detail of the URPs assigned to users within the Organisation.

### *Allocation*

This dashboard is available to the following URPs:

XXX BI Administration

XXX Local HRMS Systems & User Administration

### **Summary Tab**

This tab shows the number of users associated with URPs.

### *Prompts*

Responsibility Name

Include End-Dated URPs? Yes

Proxy Access (Y/N)

Effective Date

## URP Summary

### Description

This analysis shows the number of users associated with a URP. By default the analysis only returns URPs that are active (as at current date). Users can use a prompt available on the dashboard to return end-dated URPs if required.

### Data Items


Title	Description
Responsibility Name	
Employee Count	Number of employees (users) associated with a URP

### Actions

Click Employee Count -> Navigate to Detail Tab

### Example Screenshot

#### URP Summary

Responsibility Name	Employee Count 
000 External Learner	0
000 Absence Management (Read only)	1
000 Business Intelligence Administration	1
000 GDPR Officer	1
000 Local BI Reports	1
000 Vehicle Administration & Payroll Data Entry	1
000 Bank Administration	2
000 Finance Reporting	2
000 Finance Reporting and Hub Mapping	2
000 Local HRMS Systems Administration	3

    Rows 1 - 10

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

## Proxy URP Summary

### Description

This analysis shows the number of users associated with a Proxy URP. By default the analysis only returns Proxy URPs that are active (as at current date). Users can use a prompt available on the dashboard to return end-dated URPs if required.

### Data Items

Title	Description
Proxy URP	
Employee Count	Number of employees (users) associated with a Proxy URP

### Actions

Click Employee Count -> Navigate to Detail Tab

### Example Screenshot

#### Proxy URP Summary

Proxy URP	Employee Count
000 Manager Self Service (Payroll Approvals Not Required)	18
000 Supervisor Self Service	6

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

## Detail Tab

### Description

This analysis is a replication of the 6i 'NHS User Responsibilities Report' but also includes additional fields such as Proxy Access, Proxy User and Last Login date. The analysis allows users to query the responsibilities of a user and by default only returns URPs that are active (as at current date). Users can use prompts available on the dashboard to return end-dated URPs or employees with Proxy Access if required.

### Prompts

User Name contains any  
Employee Number  
Responsibility Name  
Organisation  
Person Type  
Assignment Status  
Primary Assignment Only (Y/N Default: None)  
Filter to Employees with Proxy Access?  
Effective Date

### Data Items

Organisation	Password Expiration Value
Employee Number	Password Expiration Type

Last Name	Email
First Name	Fax
Title	User Date From
Person Type	User Date To
Assignment Category	Fixed Term End Date
Assignment Status	Latest Start Date
Position Title	Responsibility Name
Job Role	URP Date From
Supervisor Name	URP Date To
User Name	Proxy Access (Y/N)
Description	Proxy User For (Username)
Last Successful Login Date	Proxy URP
Primary Assignment (Y/N)	

### Example Screenshot

Email	Fax	User Date From	User Date To	Fixed Term End Date	Latest Start Date	Responsibility Name	URP Date From	URP Date To	Proxy Access (Y/N)	Proxy User For (Username)	Proxy URP
joe.blogs@nhs.net		24/10/2017			02/08/2017	000 Business Intelligence Administration	24/10/2017		N		
joe.blogs@nhs.net		23/03/2018			28/02/2018	000 Business Intelligence Administration	23/03/2018		N		
joe.blogs@nhs.net		23/03/2018			28/02/2018	000 Business Intelligence Administration	23/03/2018		N		
joe.blogs@nhs.net		07/10/2017			14/08/2017	000 Business Intelligence Administration	07/10/2017		N		
joe.blogs@nhs.net		30/04/2013			01/06/2012	000 Business Intelligence Administration	30/04/2013		N		
joe.blogs@nhs.net		30/04/2013			01/06/2012	000 Business Intelligence Administration	31/03/2016		N		
joe.blogs@nhs.net		05/10/2015			05/01/2015	000 Business Intelligence Administration	05/10/2015		N		
joe.blogs@nhs.net		05/10/2015			05/01/2015	000 Business Intelligence Administration	31/03/2016		N		
joe.blogs@nhs.net		24/10/2018			01/10/2018	000 Business Intelligence Administration	24/10/2018		N		
joe.blogs@nhs.net		21/08/2018			01/08/2018	000 Business Intelligence Administration	21/08/2018		N		
joe.blogs@nhs.net		28/06/2016		06/08/2019	24/06/2016	000 Business Intelligence Administration	28/06/2016		N		
joe.blogs@nhs.net		28/06/2016		06/08/2019	24/06/2016	000 Business Intelligence Administration	01/08/2017		N		
joe.blogs@nhs.net		06/02/2018			05/02/2018	000 Business Intelligence Administration	06/02/2018		N		
joe.blogs@nhs.net		25/05/2018		06/08/2019	10/05/2018	000 Business Intelligence Administration	25/05/2018		N		
joe.blogs@nhs.net		25/05/2018		06/08/2019	10/05/2018	000 Business Intelligence Administration	10/08/2018		N		
joe.blogs@nhs.net		01/02/2017		04/02/2020	01/02/2017	000 Business Intelligence Administration	01/02/2017		N		