

ESR Service Desk Webinar

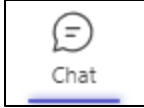
ESR Education Team

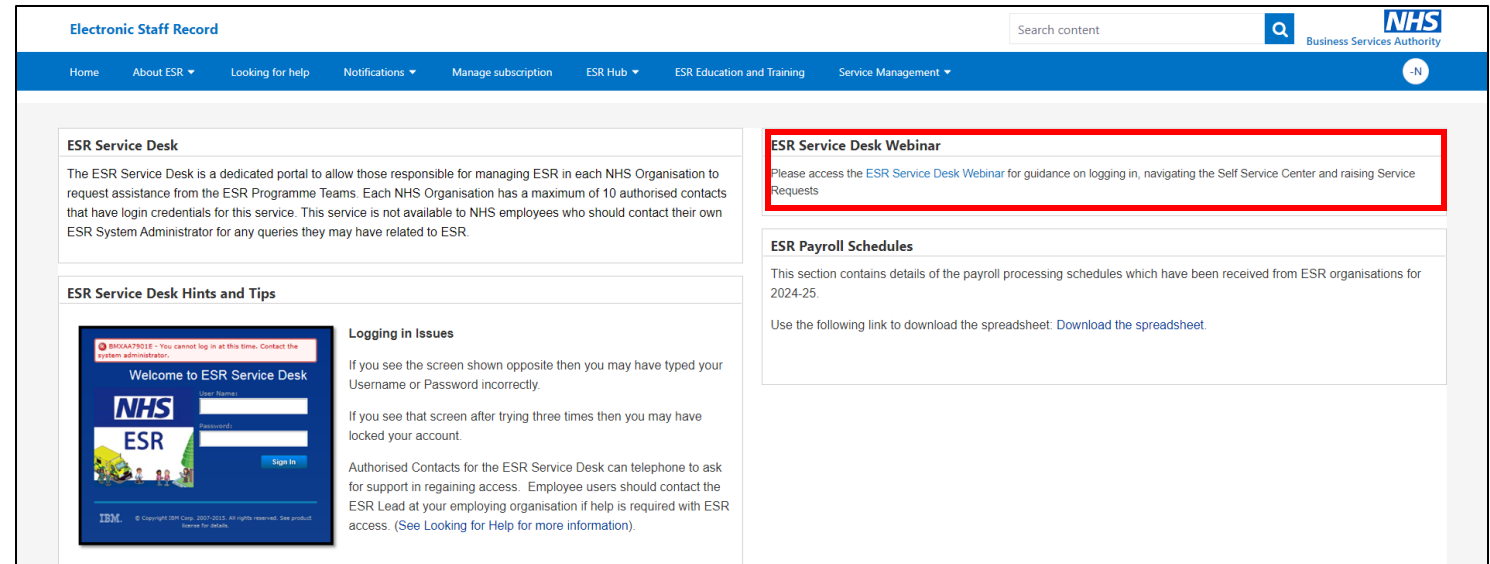


Electronic Staff Record



Course Guidance

- Session duration max. 1hr.
- Questions can be submitted via the Chat  panel at any point throughout the session.
- A copy of the presentation slides, along with the Q&As from previous sessions, is available under [Service Management > ESR Service Desk](#) on the ESR Hub.
- These will be updated with Q&As raised today and in any future sessions that are held.



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ESR Service Desk
The ESR Service Desk is a dedicated portal to allow those responsible for managing ESR in each NHS Organisation to request assistance from the ESR Programme Teams. Each NHS Organisation has a maximum of 10 authorised contacts that have login credentials for this service. This service is not available to NHS employees who should contact their own ESR System Administrator for any queries they may have related to ESR.

ESR Service Desk Webinar
Please access the [ESR Service Desk Webinar](#) for guidance on logging in, navigating the Self Service Center and raising Service Requests

ESR Service Desk Hints and Tips

Logging in Issues
If you see the screen shown opposite then you may have typed your Username or Password incorrectly.
If you see that screen after trying three times then you may have locked your account.
Authorised Contacts for the ESR Service Desk can telephone to ask for support in regaining access. Employee users should contact the ESR Lead at your employing organisation if help is required with ESR access. (See Looking for Help for more information).

ESR Payroll Schedules
This section contains details of the payroll processing schedules which have been received from ESR organisations for 2024-25.
Use the following link to download the spreadsheet: [Download the spreadsheet.](#)

Agenda

- Logging into the Service Desk
 - Forgotten Password
 - Navigation and Portlets
- Raising an SR
 - Priority
 - Summary and Details
 - Attachments
- Managing Service Requests
- Contact Management
- General Enhancement Process
- ESR BI Enhancement Process
- Additional Guidance

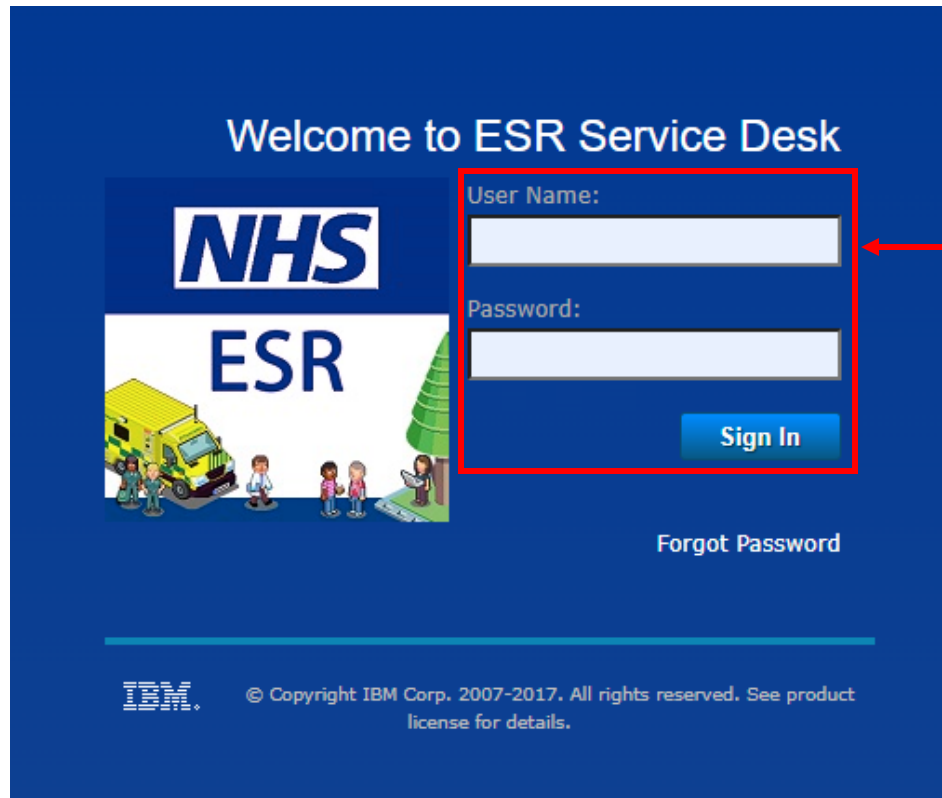
Logging into the Service Desk

Logging into the Service Desk

If you are given access to the ESR Service Desk you are classed as an **Authorised Contact**.

As an authorised contact you can log into the ESR Service Desk access using <https://servicedesk.esr.nhs.uk/>

You will be presented with the following page:



Enter your **User Name** and **Password** and click the **Sign In** button.

NOTE: If you enter incorrect details after 3 times you may have locked your account.

Forgotten Password

If you forget your password, click the **Forgot Password** link to receive a new password.

Welcome to ESR Service Desk

NHS

ESR

User Name:

Password:

Sign In


Forgot Password

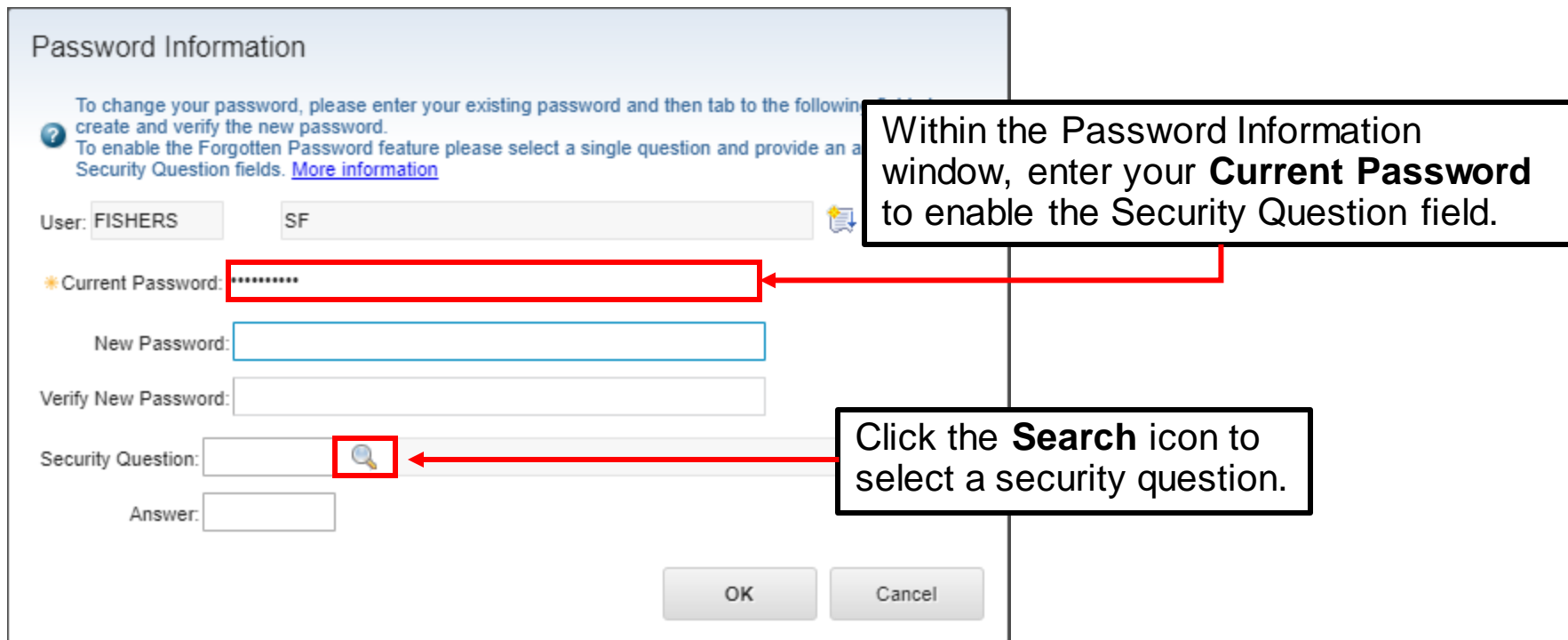
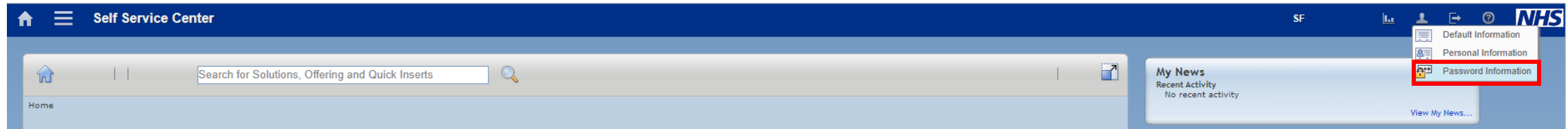
IBM. © Copyright IBM Corp. 2007-2017. All rights reserved. See product license for details.

This option can only be used if you have previously completed the **Password Information** section within your ESR Service Desk account.

NOTE: If your account is locked you cannot use the **Forgot Password** link and must instead request a password reset.

Password Information

When logged into the ESR Service Desk click the **Profile**  icon.
From the list of options select **Password Information**.

A screenshot of the 'Password Information' form. The form title is 'Password Information'. Below the title, there is instructional text: 'To change your password, please enter your existing password and then tab to the following fields to create and verify the new password. To enable the Forgotten Password feature please select a single question and provide an answer in the Security Question fields. [More information](#)'. The form contains several input fields: 'User' (with 'FISHERS' and 'SF' entered), 'Current Password' (with a red box around the masked text '*****'), 'New Password', 'Verify New Password', 'Security Question' (with a red box around the search icon), and 'Answer'. At the bottom are 'OK' and 'Cancel' buttons. Two callout boxes with arrows point to the 'Current Password' field and the search icon in the 'Security Question' field. The first callout box contains the text: 'Within the Password Information window, enter your **Current Password** to enable the Security Question field.' The second callout box contains the text: 'Click the **Search** icon to select a security question.'

Password Information

The following options are available:

The screenshot shows a 'Password Information' dialog box with a 'Select Value' sub-dialog. The sub-dialog contains a table with three rows of security questions. The first row is highlighted in light blue. A red box highlights the 'BIRTHPLACE' link in the 'Value' column, and a red arrow points from this box to the 'FIRSTSCHOOL' link in the 'Value' column of the second row. The table has columns for 'Value' and 'Description'. Below the table are 'Cancel', 'OK', and 'Cancel' buttons.

Value	Description
BIRTHPLACE	Place of Birth
FIRSTSCHOOL	First School
MAIDENNAME	Mother's maiden name


Select the security question by clicking the applicable **hyperlink** in the Value column.

Only one security question can be selected. If you change your security question this will overwrite any previously selected questions

Password Information

Password Information


To change your password, please enter your existing password and then tab to the following fields to create and verify the new password.
To enable the Forgotten Password feature please select a single question and provide an answer in the Security Question fields. [More information](#)

User: 

* Current Password:

New Password:

Verify New Password:

Security Question: 

Answer:

Enter the response to your security question in the **Answer** field.

Click the **OK** button to save your password information.

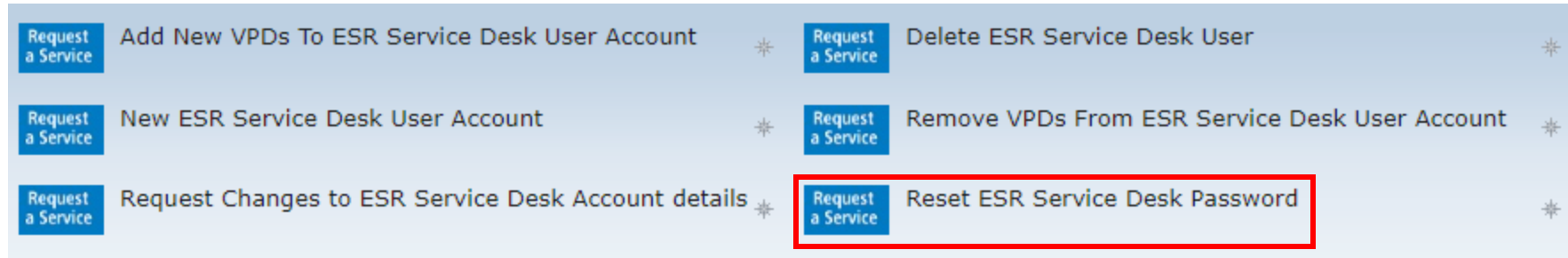
With your password information recorded you can use the **Forgot Password** link, on the ESR Service Desk homepage, to request a new password.

Forgotten Password

If you forget your password, and have not recorded your password information or your account is locked, you must do one of the following:

- Ask another Authorised Contact to raise SR on your behalf requesting a password reset.

Request a new Service > ESR Service Desk

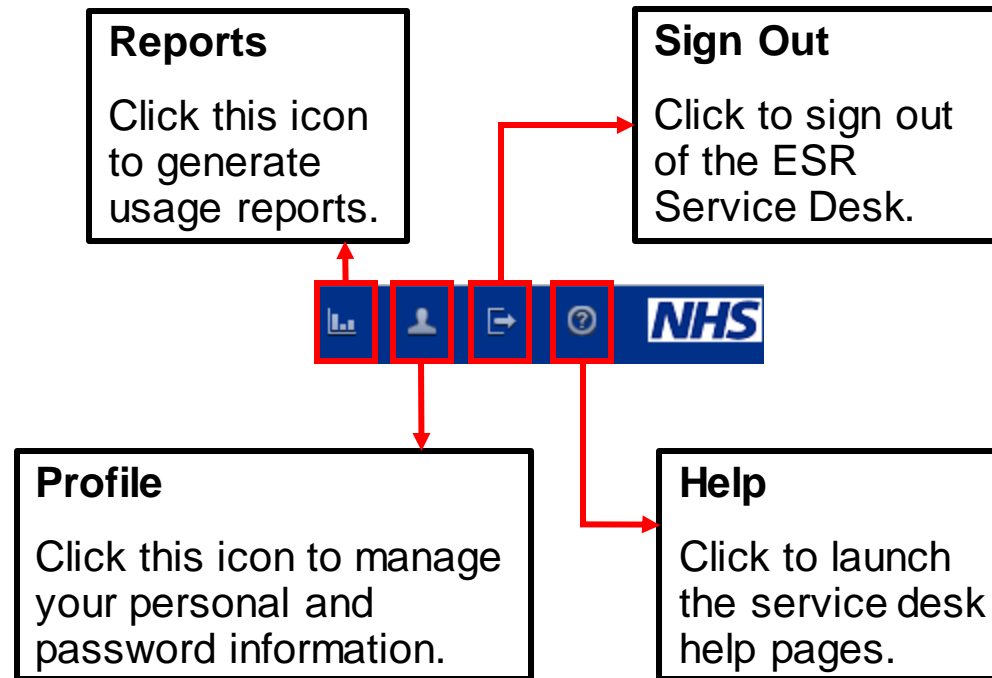


- Contact the Service Desk to request a password reset on **01606 663670**.

Navigation and Portlets

When logged into the ESR Service Desk you will land on the **Self Service Center**.

A toolbar is displayed at the top of the page with the following options:



Navigation and Portlets

Within the Self Service Center are a number of **Portlets**.

Main Portlet:

The screenshot shows a web interface with a search bar at the top containing the text "Search for Solutions, Offering and Quick Inserts". Below the search bar, the word "Home" is displayed. The main content area contains four portlets, each with a red border and a right-pointing arrow:

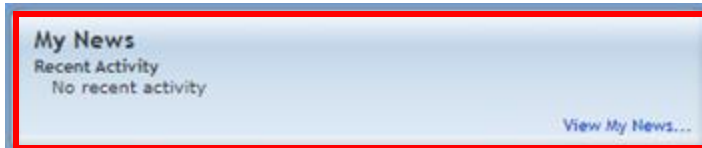
- Browse Solutions**: View all existing Solutions.
- Request a new Service**: Request a new asset or service.
- Report an Issue**: Create a new Service Request to report an Issue.
- Frequent Requests**: Easy access to the services you most often request.

Four callout boxes with black borders and white backgrounds provide additional information:

- A box on the left points to the "Request a new Service" portlet, stating: "This option enables you to request a service, for example a mass update in ESR."
- A box at the top right points to the "Browse Solutions" portlet, stating: "Within this folder you can browse solutions to common queries."
- A box on the right points to the "Report an Issue" portlet, stating: "This option should be used when you wish to report an issue, for example you can't complete an action in ESR as you have an error you don't know how to resolve."
- A box at the bottom center points to the "Frequent Requests" portlet, stating: "This folder lists the SRs you raise most frequently."

Navigation and Portlets

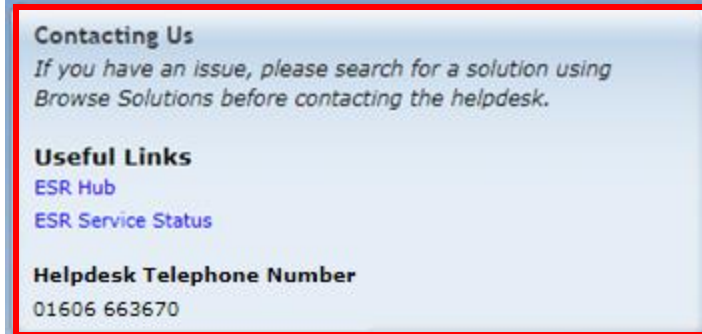
Within the Self Service Center are a number of **Portlets**.



My News
Recent Activity
No recent activity
[View My News...](#)

My News

This portlet displays (up to) the five most recent and active messages about critical problems and incidents, and information broadcast through the ESR Service Desk.



Contacting Us
If you have an issue, please search for a solution using Browse Solutions before contacting the helpdesk.

Useful Links
[ESR Hub](#)
[ESR Service Status](#)

Helpdesk Telephone Number
01606 663670

Useful Links

This portlet contains links to the ESR Hub and ESR Service Status page and provides the Helpdesk telephone number.



My Requests
Recent Activity

SR	Closed
SR	Closed
SR	Closed
SR	In Progress
SR	Closed

[Show All My Requests...](#)

My Requests

This portlet displays the 5 most recent Service Requests you have raised and their current status.



My VPD Requests
Recent Activity

SR	Queued
SR	In Progress
SR	Queued
SR	In Progress
SR	Queued

[Show All My Requests...](#)

My VPD Requests

This portlet displays the 5 most recent Service Requests raised within your VPD and their current status.

Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).

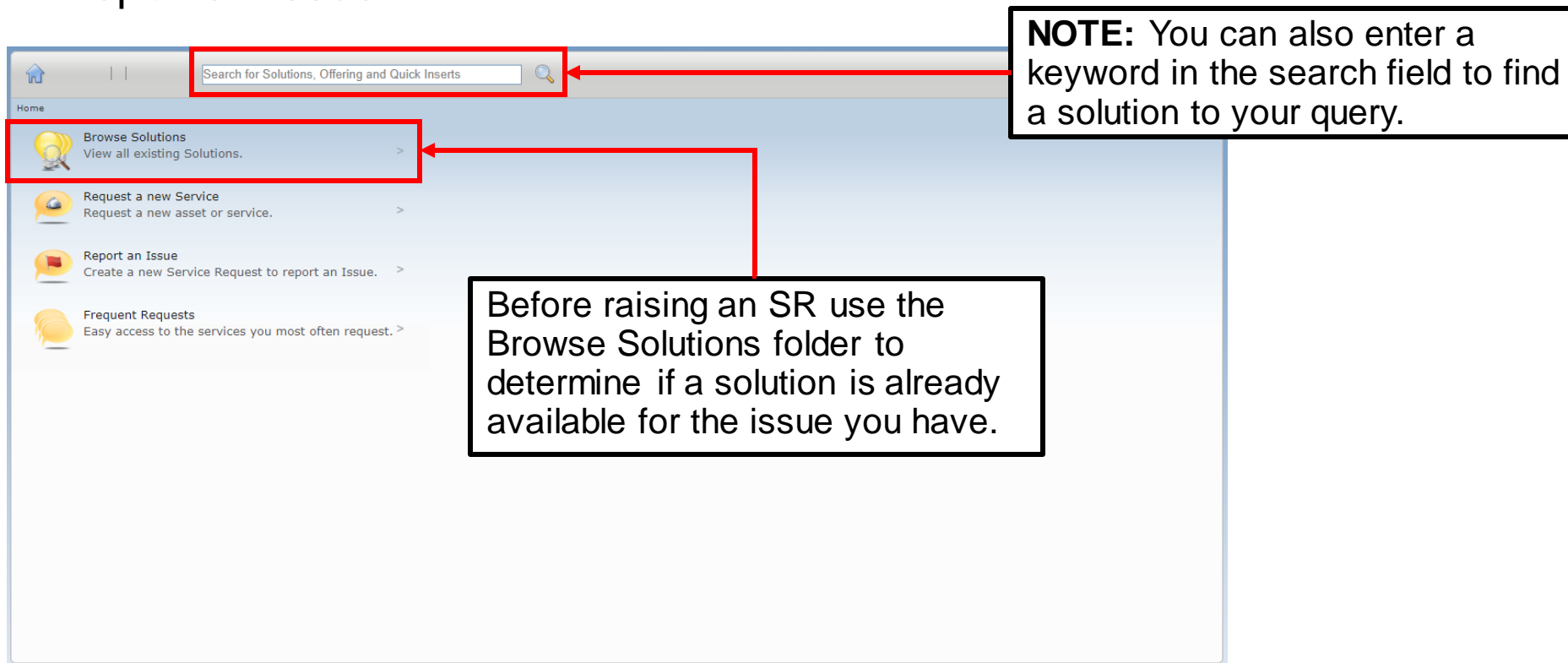


Raising a Service Request (SR)

Raising a Service Request (SR)

There are two types of Service Request:

- Request a new Service
- Report an Issue



The screenshot shows a user interface for raising a service request. At the top, there is a search bar with the placeholder text "Search for Solutions, Offering and Quick Inserts". Below the search bar, there is a "Home" section with four main options: "Browse Solutions" (with a magnifying glass icon and the subtext "View all existing Solutions."), "Request a new Service" (with a gear icon and the subtext "Request a new asset or service."), "Report an Issue" (with a speech bubble icon and the subtext "Create a new Service Request to report an Issue."), and "Frequent Requests" (with a stack of coins icon and the subtext "Easy access to the services you most often request."). Red boxes highlight the search bar and the "Browse Solutions" option. Red arrows point from a note box to the search bar and from another note box to the "Browse Solutions" option.

NOTE: You can also enter a keyword in the search field to find a solution to your query.

Before raising an SR use the Browse Solutions folder to determine if a solution is already available for the issue you have.

Raising a Service Request (SR)

Report an Issue

The screenshot shows a web application interface for raising a service request. On the left, a navigation menu is visible with the following items:

- Browse Solutions
View all existing Solutions. >
- Request a new Service
Request a new asset or service. >
- Report an Issue**
Create a new Service Request to report an Issue. >
- Frequent Requests
Easy access to the services you most often request. >

The 'Report an Issue' option is highlighted with a red box. A red arrow points from this box to a larger screenshot of the application's main content area. This larger screenshot shows the breadcrumb path 'Home > Report an Issue > AC' and a grid of folders representing different service categories:

- Absence
- BACS
- Interfaces
- Notifications
- Pay
- Portal
- Print Production
- Registrations
- Reporting
- Self Service
- TRs
- Access Security
- HR
- Learning Management
- Occupational Health
- Performance
- Print Production
- Reporting
- TPLY

The 'Portal' folder is highlighted with a red box. A red arrow points from this box to a text box on the right. The text box contains the following text:

Select the folder which represents the category under which your issue falls, for example **Portal**.

Another text box at the top of the larger screenshot contains the following text:

On clicking the **Report an Issue** folder a series of additional folders will be displayed.

Raising a Service Request (SR)

Report an Issue

A series of sub-folders will be displayed, enabling you to further categorise the issue you wish to report.

Select the applicable sub-folder, for example **Portal \ Dashboard**.

Click on the blue **Report an Issue** icon to add details to the Service Request.

Raising a Service Request (SR)

Report an Issue

The Report an Issue page is displayed with a number of fields pre-populated with the details of the person raising the SR.

NOTE: All fields marked with an * must be completed.

If you are raising the SR on behalf of another Service Desk user, click the magnifying glass in the **Reported For** field to search for the person.

The remaining fields will auto-populate.

Report an Issue

Priority Description

- 1 - Critical: - The ESR system is unavailable to a large group of ESR Users, or there is an issue that may cause significant adverse impact on the system.
e.g. the system is not available to any user at the User Organisation; request to recall a BACS file.
- 2 - Severe: - Major adverse impact on activity of the User Organisation and no acceptable workaround available; or moderate adverse impact on activity of the User Organisation.
e.g. a payroll process is failing and the pay date is potentially compromised.
- 3 - High: - Major adverse impact on activity which is reduced due to an acceptable workaround; or moderate adverse impact on activity of the User Organisation.
e.g. inability to access the system for a number of users; an inbound interface file containing payroll affecting a large number of users.
- 4 - Moderate: - Minor adverse impact on the provision of the Services to ESR Users.
e.g. inability to access data for a single user; request for delegate to attend a User training session.
- 5 - Low: - A cosmetic flaw that does not undermine the confidence in the data being displayed.
e.g. spelling error, or misalignment of data on screen display, a request for service, change or enhancement.

For priorities 1,2 or 3, you will receive a phone call from the Service Desk shortly after the call has been logged. Please be available to take the call.

Describe the Issue Attachments

* Customer: 000 IBM * Priority: *
Provider: Classification: Portal \ Dashboard

* Reported By: FISHERS
Name: SF
Phone: +44 01926 47 4747
E-mail: s.f@nhs.net

Reported For: FISHERS
Name: SF
* Phone: +44 01926 47 4747
* E-mail: s.f@nhs.net
* Contact Method: Email

* Summary:

* Details:

Specifications Filter > 1 - 1 of 1

Attribute	Description	Value
	Which dashboard is impacted?	

Add to Favorites Submit Now Cancel

If you are raising the SR on behalf of a person who is not a Service Desk user, delete the entry in the Reported For field and complete the remaining fields manually.

Raising a Service Request (SR)

Report an Issue – Priority

A priority must be assigned to the issue you are reporting.

Report an Issue

Priority Description

- 1 - Critical:** - The ESR system is unavailable to a large group of ESR Users, or there is an issue that may cause significant financial loss.
e.g. the system is not available to any user at the User Organisation; request to recall a BACS file.
- 2 - Severe:** - Major adverse impact on activity of the User Organisation and no acceptable workaround available; or may cause some financial loss.
e.g. a payroll process is failing and the pay date is potentially compromised.
- 3 - High:** - Major adverse impact on activity which is reduced due an acceptable workaround; or moderate adverse impact on activity.
e.g. inability to access the system for a number of users; an inbound interface file containing payroll affecting data has failed.
- 4 - Moderate:** - Minor adverse impact on the provision of the Services to ESR Users.
e.g. inability to access data for a single user; request for delegate to attend a User training session.
- 5 - Low:** - A cosmetic flaw that does not undermine the confidence in the data being displayed.
e.g. spelling error; or misalignment of data on screen display, a request for service, change or enhancement.

For priorities 1,2 or 3, you will receive a phone call from the Service Desk shortly after the call has been logged. Please be available to take the call.

Describe the Issue **Attachments**

* Customer:

* Priority:

It is essential that you assign the correct priority to your SR to ensure you receive the right level of support for your issue.

Raising a Service Request (SR)

Report an Issue – Priority Examples

1 Critical

This is the highest priority that can be given to a SR and should ONLY be used where there is an issue that may cause significant financial loss or is affecting system access / performance, for example the ESR service is unavailable.

2 Severe

This priority should be given to a SR if the issue could result in financial loss or is having a major impact on local processing, for example staff may not get paid on time due to a Payroll process failing.

Select Value

Filter > [Search Icon] [Refresh Icon] [Up Arrow] [Down Arrow] 1 - 5 of 5 [Close Icon]

Value	Description
1	Critical
2	Severe
3	High
4	Moderate
5	Low

3 High

This should be used where the issue is having a moderate affect on ESR but with no financial impact for example, an individual user cannot access the system.

If an SR is raised as a priority 1, 2 or 3 you will receive a telephone call from the Support team therefore you will need to be available to take this call.

Raising a Service Request (SR)

Report an Issue – Priority Examples

4 Moderate

This is the standard priority that should be assigned to any SR that doesn't meet the criteria of a high priority call but that is having an impact on ESR Activity, for example you are unable to hire / terminate an employee.

The screenshot shows a 'Select Value' dialog box with a table of priority levels. The table has two columns: 'Value' and 'Description'. The rows are: 1 Critical, 2 Severe, 3 High, 4 Moderate, and 5 Low. The '4 Moderate' row is highlighted with a red box. There is also a 'Cancel' button at the bottom right.

Value	Description
1	Critical
2	Severe
3	High
4	Moderate
5	Low

5 Low

This is the lowest priority that can be given to a SR and is applicable when the issue is cosmetic, for example a spelling mistake, or where there is no immediate impact on ESR activity.

Raising a Service Request (SR)

Report an Issue – Summary and Details

The screenshot shows a web form for reporting an issue. The 'Summary' field is a text box with a red border and a red arrow pointing to it from the left. Below it is a rich text editor for the 'Details' field, also with a red border and a red arrow pointing to it from the right. The form includes a toolbar with text formatting options (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, image, video, table, undo, redo) and dropdown menus for font, size, and format. Below the text fields is a 'Specifications' section with a 'Filter' button and a table with columns 'Attribute', 'Description', and 'Value'. The first row in the table has 'Which dashboard is impacted?' in the 'Description' column and an empty text input in the 'Value' column. At the bottom right are three buttons: 'Add to Favorites', 'Submit Now', and 'Cancel'.

Details

This field should be used to provide as much information as possible to explain the issue you are facing including examples where applicable.

Summary

Here you should provide a brief summary of the issue. This should be meaningful and an accurate snapshot of the issue.

Do not enter sensitive information into either the Summary or Description fields.

Raising a Service Request (SR)

Report an Issue – Summary and Details

The screenshot shows a web form for raising a service request. It is divided into three main sections: Summary, Details, and Specifications. The Summary section has a text input field. The Details section has a rich text editor with a toolbar containing icons for undo, redo, cut, copy, paste, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, and image. The Specifications section is a table with columns for Attribute, Description, and Value. The first row in the table has a play button icon in the Attribute column, the text 'Which dashboard is impacted?' in the Description column, and a text input field in the Value column. A red box highlights the search icon (magnifying glass) next to the Value input field. Below the table are three buttons: 'Add to Favorites', 'Submit Now', and 'Cancel'.

Attribute	Description	Value
▶	Which dashboard is impacted?	<input type="text"/>

Specifications

Dependent on the issue being raised you may also be presented with a series of questions. Completing these fields will help the ESR Support Team with their investigations and, if required, replicate the steps.

If the question has a Search icon next to the Value field, click the icon to select an option from the pre-defined list.

Raising a Service Request (SR)

Report an Issue – Attachments

Describe the Issue | **Attachments**

Only files with the following formats can be attached:
pdf,zip,txt,doc,docx,gif,jpg,svg,xls,xlsx,ppt,xsl,bmp,png,pptx,catalog,msg,dat,mf

Clear the check box beside the Print attached document with report if printable type option (Advanced Option) if the file being attached is not in one of these formats:
pdf, csv,txt,doc,gif,jpg,xls,ppt,pptx,docx,xlsx,png,cfr

Attachments | Filter > 0 - 0 of 0

Document	Description
There are no rows to display.	

Attach File | Attach Web Address Link

Specifications | Filter >

Attribute	Description	Value
	Which dashboard is impacted?	MyESR

Add to Favorites | Submit Now | Cancel

Where possible screenshots of the issue you are having, including any error messages, should be added to the SR as attachments.

Click the **Attach File** button.

Raising a Service Request (SR)

Report an Issue – Attachments

The **Attach File** dialog box contains the following elements and instructions:

- Display Name:** A text input field. Annotation: "The **Display Name** field should be populated with the title of the attachment."
- Description:** A text input field. Annotation: "The **Description** field should give a brief explanation of what is attached."
- Sensitive Info Included?** A checkbox. Annotation: "The **Viewable** checkbox will be ticked by default. The **Sensitive Info Included?** checkbox should also be ticked if applicable."
- Viewable?** A checked checkbox.
- Specify a file:** A button labeled **Choose File** and the text "No file chosen". Annotation: "Click the **Choose File** button to browse and select the attachment."
- Cancel:** A button at the bottom right.

Raising a Service Request (SR)

Report an Issue – Attachments

Attach File

Add here any attachments containing information that could help us better attend your service request, such as screen capture and error logs. A document ID and description are required to be entered before an attachment can be added.

* Display Name:

* Description:

Sensitive Info Included?

Viewable?

Specify a file: Error Message.png

Once the attachment has been added, if the OK button is not visible, press the **Tab** key on the keyboard

The **OK** button will be enabled, click to continue.

Raising a Service Request (SR)

Report an Issue – Attachments

Describe the Issue | **Attachments**

Only files with the following formats can be attached:
pdf,zip,txt,doc,docx,gif,jpg,svg,xls,xlsx,ppt,xsl,bmp,png,pptx,catalog,msg,dat,mf

Clear the check box beside the Print attached document with report if printable type file being attached is not in one of these formats:
pdf,svg,txt,doc,gif,jpg,xls,ppt,pptx,docx,xlsx,png,cfr

Attachments | Filter | 1 - 2 of 2

Document	Description
ERROR	Screenshot of error message

Attach File | Attach Web Address Link

Which dashboard is impacted? MyESR

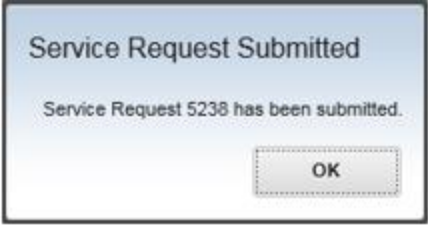
Add to Favorites | **Submit Now** | Cancel

The attachment has been added to the SR.

If you have multiple attachments to add, click the **Attach File** button again to repeat the process.

Once all attachments have been added click the **Submit Now** button to raise the SR.

Confirmation of the submission is displayed, quoting the SR number.



Raising a Service Request (SR)

Viewing Attachments

To view an attachment that has been added to an Service Request, click the SR number in the **My Requests** portlet.

The screenshot shows a web interface for viewing attachments. At the top, there are tabs: Request Details, Questions, Log, Solutions, and Attachments. The Attachments tab is selected and highlighted with a red box. A callout box above it says "Select the Attachments tab." Below the tabs, there are instructions about file formats and a list of supported formats. The Attachments section shows a table with columns: Document, Description, Created Date, and Created By. The first row is highlighted with a red box and contains the text "TPLY", "TPLY", "06/02/2023 16:13:37", and "FISHERS". A callout box below the table says "Click the hyperlink in the Document column." To the right, a Downloads window is open, showing a file named "TPLY.docx" with a red box around it and a callout box saying "In the Downloads window, click Open file to view the attachment." The Downloads window also shows an "Open file" link. At the bottom right, there are buttons for "OK", "Cancel", and "Resolve".

Select the **Attachments** tab.

Only files with the following formats can be attached:
pdf,zip,bxt,doc,docx,gif,jpg,svg,xls,xlsx,ppt,xsl,bmp,png,pptx,catalog,msg,dat,mf

Clear the check box beside the Print attached document with report if printable type option (Advanced Option) if the file being attached is not in one of these formats:
pdf,svg,bxt,doc,gif,jpg,xls,ppt,pptx,docx,xlsx,png,cfr

Attachments Filter > 1 - 2 of 2

Document	Description	Created Date	Created By
TPLY	TPLY	06/02/2023 16:13:37	FISHERS

Attach File Attach Web Page

Downloads

TPLY.docx
[Open file](#)

In the Downloads window, click **Open file** to view the attachment.

Click the **hyperlink** in the Document column.

OK Cancel Resolve

Raising a Service Request (SR)

Request a Service

The screenshot shows a web form titled "Mass Update - Competencies" for item ESRSC30049. It includes a "Request a Service" button, a star rating, and a "Fulfillment Time: 10 Working Days" label with a "Paperclip" icon. The form contains fields for "Name", "Phone", "E-mail", and "Required By Date". A "Submit Request" button is at the bottom right. Red boxes and arrows highlight the "Fulfillment Time" label, the "Paperclip" icon, and the "Required By Date" field.

If requesting a service that requires a template to be completed, click the **Paperclip** icon to access the template. This should be completed and attached to the SR.

This enables you to enter a date by which the service is required however this must be at least on or after the **Fulfillment Time** which is shown at the top of the page.

The steps to take to Request a Service are the same as when raising an SR to Report an Issue however, services have a **Required By Date** rather than a Priority.

Raising a Service Request (SR)

Request a Service

Mass Update - Competencies

Item: ESRSC30049 Comments: 39 Fulfillment Time: 10 Working Days
Offering Documents

Last Update: 23/04/2017 19:50:31

Mass Upload facility to enter bulk volumes of competencies in to ESR

Request a Service

* Customer: IBM Provider: Reported For: FISHERS
Reported By: FISHERS * Name: SF

Name: SF
Phone: +44 01926 47 4747
E-mail: s.f@nhs.net

User Provided Attachments

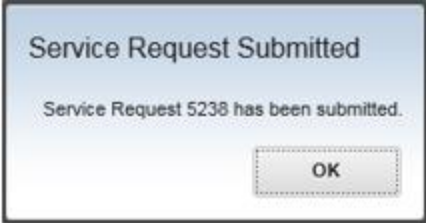
Offering Details Comments and Ratings

Submit Request

Add to Favorites Rate this Offering Cancel

Once all details have been entered and any attachments added, click the **Submit Request** button to raise the SR.

Confirmation of the submission is displayed, quoting the SR number.



Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).



Managing Service Requests

Managing Service Requests

When you receive an email reply from the Support Analyst about your issue, if you wish to reply to this email rather than logging into the ESR Service Desk to respond, please ensure that you do not change the format of the subject heading.

This is shown in the example format below:

'Update on ##SR12345678##, Service Call....'

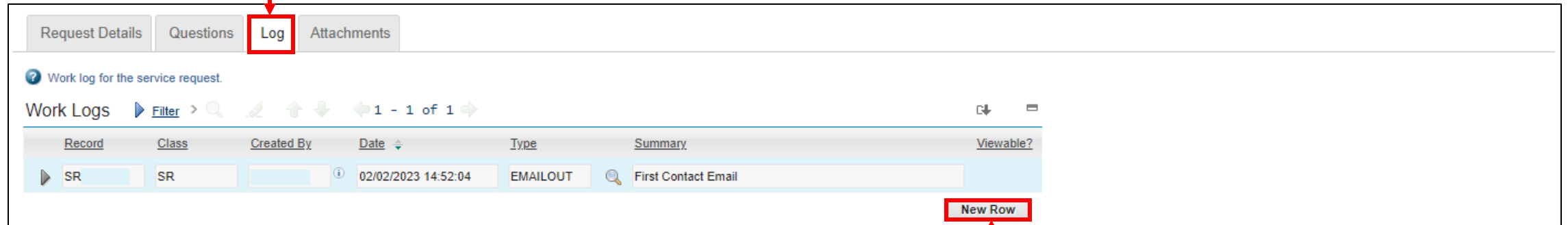
If the format of this heading is changed then the email will not reach either the SR or the Analyst and will delay progress.

Managing Service Requests

Request Update / Escalate

To request an update on a Service Request or escalate the call, click the SR number in the **My Requests** portlet.

Select the **Log** tab.



The screenshot shows the 'Log' tab selected in a portlet. The 'Log' tab is highlighted with a red box. Below the tabs, there is a 'Work Logs' section with a table of logs. The table has columns: Record, Class, Created By, Date, Type, Summary, and Viewable?. A single row is visible with the following data: Record: SR, Class: SR, Created By: [redacted], Date: 02/02/2023 14:52:04, Type: EMAILOUT, Summary: First Contact Email, Viewable?: [redacted]. A 'New Row' button is located at the bottom right of the table, highlighted with a red box.

Record	Class	Created By	Date	Type	Summary	Viewable?
SR	SR	[redacted]	02/02/2023 14:52:04	EMAILOUT	First Contact Email	[redacted]

Click the **New Row** button.

Managing Service Requests

Request Update / Escalate


Request Details Questions **Log** Attachments

? Work log for the service request.

Work Logs Filter > 1 - 2 of 2

Record	Class	Created By	Date	Type	Summary	Viewable?
SR	SR		02/02/2023 14:52:04	EMAILOUT	First Contact Email	
SR	SR		02/02/2023 15:04:56	CLIENTNOTE		

Details

Record: SR
Class: SR
Created By:
Date: 02/02/2023 15:04:56
* Type: CLIENTNOTE 

* Summary:
* Details:
New Row

If requesting an update or escalating a call you must follow these steps.

The Type will default to CLIENTNOTE.
Click the **Magnifying Glass** icon to select the type of Log Note you wish to add to the SR.

Managing Service Requests

Request Update / Escalate

CLIENTNOTE

This option enables you to add further information to an SR.

Select Value

Filter > 1 - 5 of 5

<u>Value</u>	<u>Description</u>
<input type="text"/>	<input type="text"/>
CLIENTNOTE	Client Note
REQUESTUPDATE	Request Update
RESOLVED	Resolved.
ESCALATE	Escalate

Cancel

Managing Service Requests

Request Update / Escalate

Select Value

Filter > 1 - 5 of 5

<u>Value</u>	<u>Description</u>
<input type="text"/>	<input type="text"/>
<u>CLIENTNOTE</u>	<u>Client Note</u>
<u>REQUESTUPDATE</u>	<u>Request Update</u>
<u>RESOLVED</u>	<u>Resolved.</u>
<u>ESCALATE</u>	<u>Escalate</u>

Cancel







REQUESTUPDATE

Use this to request an update on the status of an SR.

Managing Service Requests

Request Update / Escalate

Select Value

Filter >     1 - 5 of 5  

<u>Value</u>	<u>Description</u>
<input type="text"/>	<input type="text"/>
<u>CLIENTNOTE</u>	<u>Client Note</u>
<u>REQUESTUPDATE</u>	<u>Request Update</u>
<u>RESOLVED</u>	<u>Resolved.</u>
<u>ESCALATE</u>	<u>Escalate</u>

Cancel

RESOLVED

This should be used to notify the Support team the information provided has resolved the issue.

Managing Service Requests

Request Update / Escalate

Select Value

Filter > 1 - 5 of 5

<u>Value</u>	<u>Description</u>
<input type="text"/>	<input type="text"/>
<u>CLIENTNOTE</u>	<u>Client Note</u>
<u>REQUESTUPDATE</u>	<u>Request Update</u>
<u>RESOLVED</u>	<u>Resolved.</u>
<u>ESCALATE</u>	<u>Escalate</u>

Cancel

ESCALATE

Use this option to escalate the SR.

Managing Service Requests

Request Update / Escalate

- Do not enter a request for update or escalation in response to a Service Desk email as your request will not be picked correctly and may not lead to a satisfactory result.
- Support will endeavour to respond to requests for updates within 48 hours.
- Support will endeavour to respond to escalations within 24 hours.

NOTE: These timeframes are based on best endeavours and may not be achieved during really busy times, such as following an ESR Release.

REMEMBER: The helpdesk number (01606) is not intended for escalation purposes. Our Analysts cannot accept incoming calls unless this has been pre-agreed via the SR. The helpdesk team will not be able to put you through.

If you have followed the correct process, and it fails to result in an update from the ESR Support Team, the issue can be escalated to your dedicated [IBM Client Relationship Manager](#).

Please be aware that your NHS Functional Account Managers do not have access to the ESR Service Desk and are therefore unable to assist with escalations or issues with the IBM Service.

Managing Service Requests

When the status of your Service Request changes you will automatically receive an email.

Customer Response

- If the status of your SR is set to **Customer Response** you are required to provide more information for the Support Team to progress your call.
- If you do not respond to the request for additional information within 30 days, your Service Request will be automatically closed.

Customer Closure

- If the status of your SR is set to **Customer Closure**, a resolution to your issue has been provided. **Remember** to check the Solutions tab for details.
- If you are happy with the resolution you should attach a RESOLVED log note to the SR.
- If you do not do this, or update the SR to say the resolution is not satisfactory, within 60 days your Service Request will be automatically closed.

Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).



Contact Management

Contact Management

- Up to 10 user accounts are available per Trust.
- Where a payroll provider has multiple VPDs contact with the Client Relationship Manager will need to take place to discuss the requirement.
- Access is restricted to ensure that the relevant triage is undertaken.
- **PLEASE** notify us asap if an ESR Service Desk User leaves your Organisation or if changes are required.

Request a new Service > ESR Service Desk

Request a Service	Add New VPDs To ESR Service Desk User Account *	Request a Service	Delete ESR Service Desk User *
Request a Service	New ESR Service Desk User Account *	Request a Service	Remove VPDs From ESR Service Desk User Account *
Request a Service	Request Changes to ESR Service Desk Account details *	Request a Service	Reset ESR Service Desk Password *

Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).



General Enhancement Process

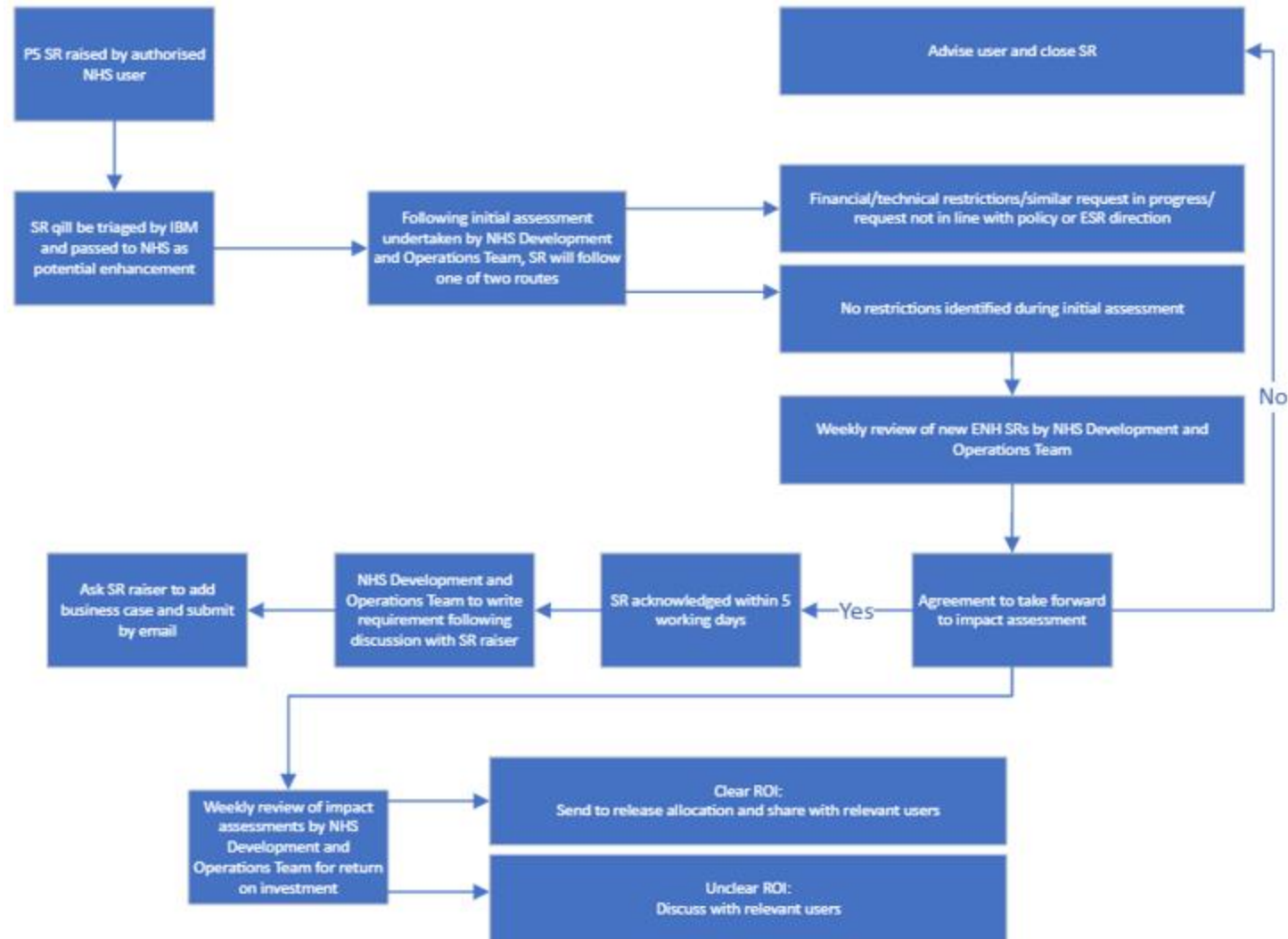
Matt Lye
NHS ESR Development Advisor

ESR Solution Development

It is essential that any process that identifies and promotes change to the ESR system is clear, transparent, and fully auditable in terms of justification of budgetary spend and value for money. It also needs to be able to react to perceived user needs in a timely and efficient manner.

- Any authorised user of the ESR Service Desk solution will be able to raise a suggestion for system enhancement at any time;
- When a call raised by an authorised user is classified as an enhancement (following ESR Central Team triage and assessment against existing requirements, national policy etc), the user will be asked if they wish to progress by the NHS ESR Development Team;
- If they do they will be asked to work with the NHS ESR Development Team to agree a comprehensive definition of the requirement and provide a separate justification of the business need, benefits case, etc.

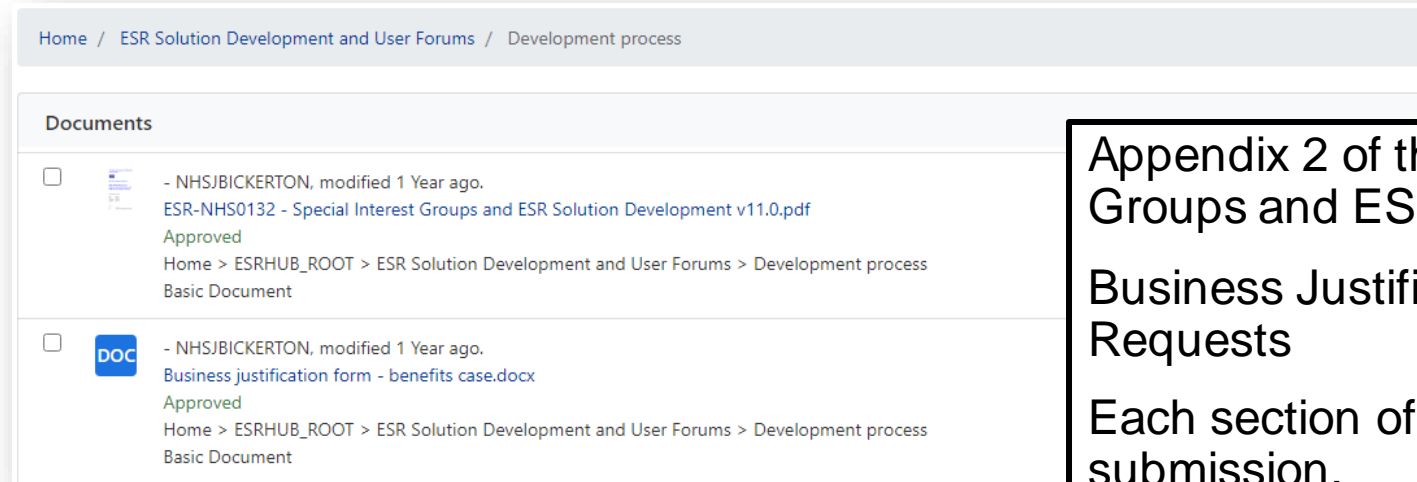
Development Request Process Flow



The Business Justification Form



All documents are available on the ESR Hub in the Document Library:

[ESR Solution Development and User Forums/ Development process](#)



Home / ESR Solution Development and User Forums / Development process

Documents

-  - NHSJBICKERTON, modified 1 Year ago.
ESR-NHS0132 - Special Interest Groups and ESR Solution Development v11.0.pdf
Approved
Home > ESRHUB_ROOT > ESR Solution Development and User Forums > Development process
Basic Document
-  - NHSJBICKERTON, modified 1 Year ago.
Business justification form - benefits case.docx
Approved
Home > ESRHUB_ROOT > ESR Solution Development and User Forums > Development process
Basic Document

Appendix 2 of the ESR-NHS0132 National Special Interest Groups and ESR Solution Development document.

Business Justification Form for ESR Development Requests

Each section of this form must be completed fully prior to submission.

Users writing business cases in support of enhancement SRs can seek the support of their regional special interest groups and/or the NHS ESR Functional Account Manager for their region.

The Business Justification Form

Administration

- Name of person raising the request.
- Organisation of person raising the request.
- Supporting SR number.

Benefits case

- Describe how the proposed change supports any national strategy or initiative.
- Describe clearly the benefits of the proposed change including how it would improve the usability of ESR and increase productivity, or efficiency and effectiveness.
- Provide details of financial impact - reduction in costs, time, etc.
- Describe how the proposed change could increase the utilisation of ESR functionality.
- Describe how you and your region would promote this change to other ESR users.

Completing the Business Justification Form

- Provide a strong case for change
- Support for National Strategies – make reference to the strategy, policy or initiative
- Make clear the benefits of the requested enhancement
- Include an estimate of the number of users impacted and the reduction in time taken for transactions or business processes which will be enhanced by the request
- If there are any cash releasing benefits to your organisation include them
- If there is a potential for increased use of functionality reference it
- How will you promote this change? Demonstrate how you would promote, endorse and share best practice

Email the completed form to Julie Bickerton at julie.bickerton@nhsbsa.nhs.uk



Additional Development

Requests for changes to:

- Supplementary Roles
- Competences

Home / ESR Solution Development and User Forums / Development process

Documents

<input type="checkbox"/>		- NHSJBICKERTON, modified 2 Years ago. Request for new competence v1.0.docx Approved Home > ESRHUB_ROOT > ESR Solution Development and User Forums > Development process Basic Document	⋮
<input type="checkbox"/>		- NHSJBICKERTON, modified 7 Months ago. Request for new supplementary role v3.0.docx Approved Home > ESRHUB_ROOT > ESR Solution Development and User Forums > Development process Basic Document	⋮

Should be made via the appropriate forms which can be found on the ESR Hub in the Document Library - [ESR Solution Development and User Forums/ Development process](#)

Your Contribution

If you have an idea for a ESR development;

- Raise an SR.
- If you are not an authorised user of the ESR Service Desk contact your Organisations ESR Lead who will be able to do this on your behalf.

Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).



ESR BI Enhancement Process

Charlotte Barnett
NHS ESR Assistant Development Advisor

ESR BI Enhancement Process

- All ideas to be raised via a Service Request on the Service Desk.
- Possible and beneficial developments will be asked to complete a Business Justification Form (BJF).
- BJF is considered by the review group (including SIG Chairs).
- If supported, the BJF is progressed by the BI Development Team.
- Any returns to be completed centrally – please follow the above process.

Questions?

Please submit via the Chat panel.

Answers will be added to the presentation slides on the [ESR Hub](#).



Additional Guidance



Additional Guidance

Please direct any ESR Service Desk queries to your [IBM Client Relationship Manager](#).

NOTE: You must be logged into ESR to view this page on the ESR Hub.

Please be aware that your regional NHS Functional Account Managers do not have access to the ESR Service Desk to review or progress your SRs.

Thank you for taking part in the ESR Service Desk Webinar.

You may now disconnect from the presentation.



ESR Service Desk Webinar Q&A

ESR Education Team



Electronic Staff Record



ESR Service Desk Webinar

Question	Answer
What is the maximum authorised contacts?	Up to 10 accounts are available to an Organisation however this requirement may differ for a Payroll Provider with multiple VPDs – see slide 45.
Can you change the Reported For details after the SR has been raised?	No, the Reported For fields become read only once the SR has been raised.
Are you able to see a list of your authorised users anywhere?	Please contact your dedicated IBM CRM who can provide this information for you.
Is raising SR free , or does it cost to the trust?	Raising an SR is a free service.
I received an update email today asking me to check the log and when I did there was a notice from the SDA dated 21/11, which I hadn't received via email. Does this need another SR?	Please check the current status of the SR – if the SR is at Customer Response or Customer Closure you can still update the SR. If the status is Closed a new SR will be required.
Can you change who owns the SR e.g. if person that raised goes off on long term sick – can it be given to someone else with an account to manage?	The Reported By and Reported For fields become read only once the SR has been raised. You can however access the SR from the My VPD Requests portlet and add a Log Note asking for another person to be included in the SR updates.
What is the difference between section "My Requests" and "My VPD Requests"	Please see slide 13.
Would an ESR development include changes to BI standard reports?	Yes, changes to standard ESR BI content would be considered a development. Possible and beneficial developments will be asked to complete a Business Justification Form (BJF).