ESR Service Desk Webinar

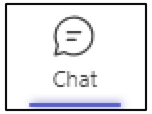
ESR Education Team

DISCOVER YOUR ESR

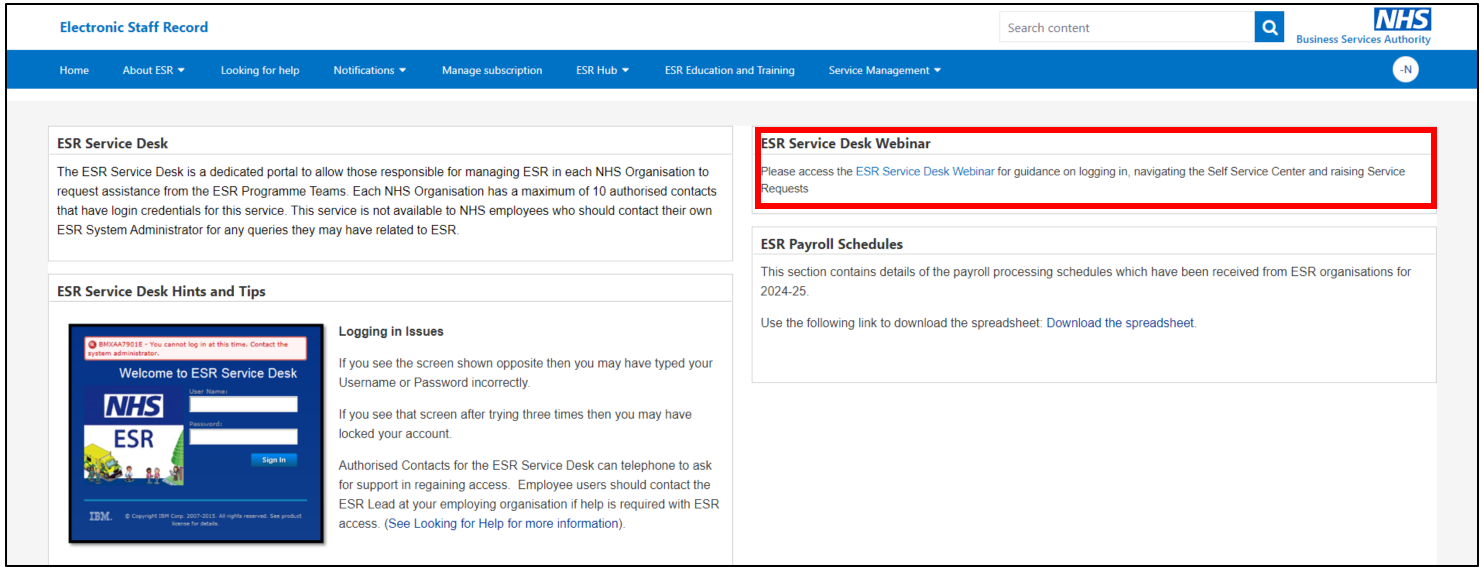
Electronic Staff Record

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.

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

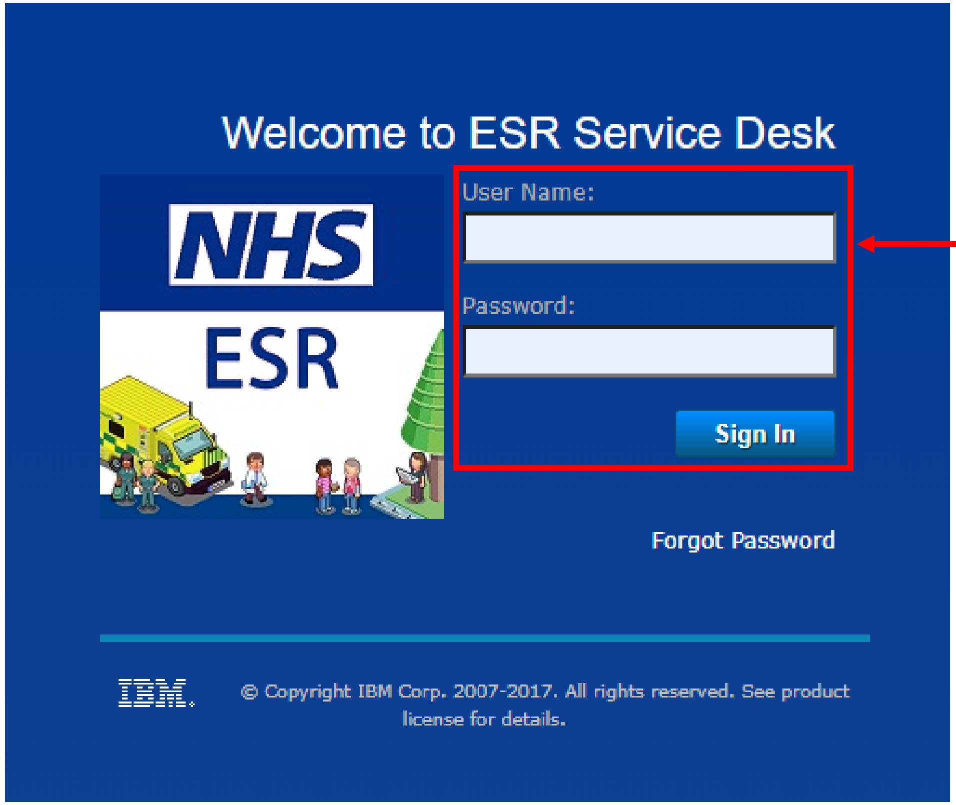
Logging into the Service Desk

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:

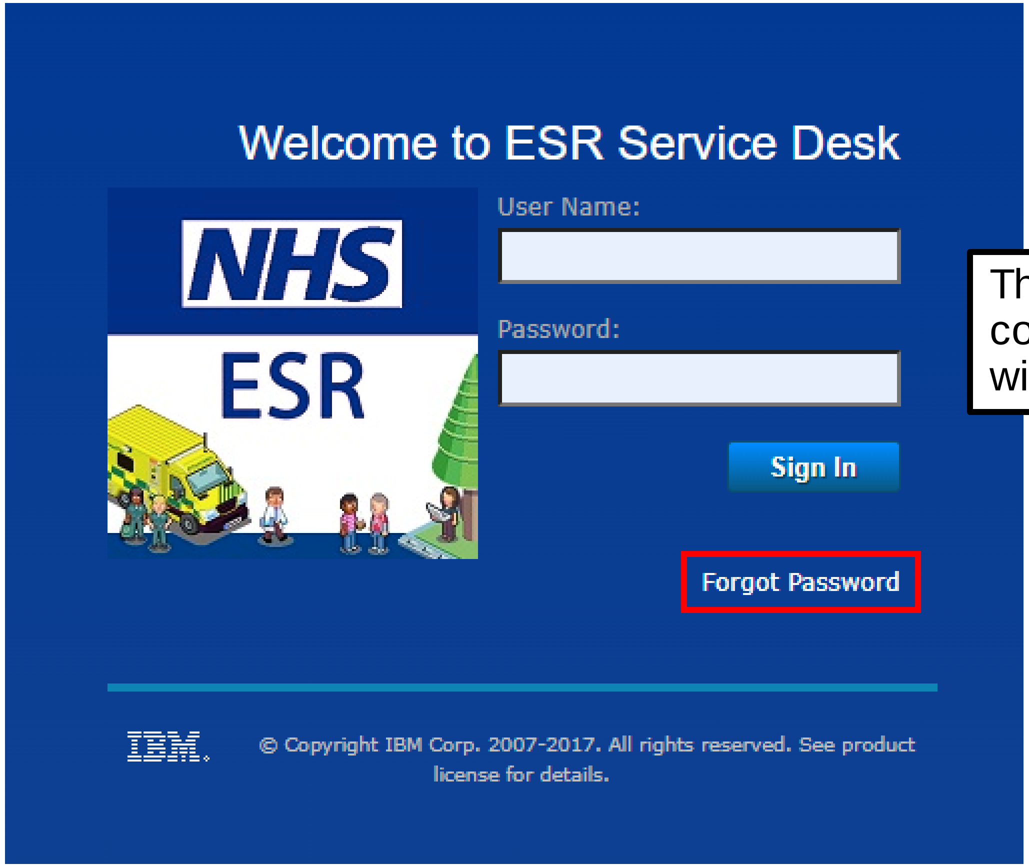


Enter your **User Name** and **Password** and click the **Sign In** button.

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.



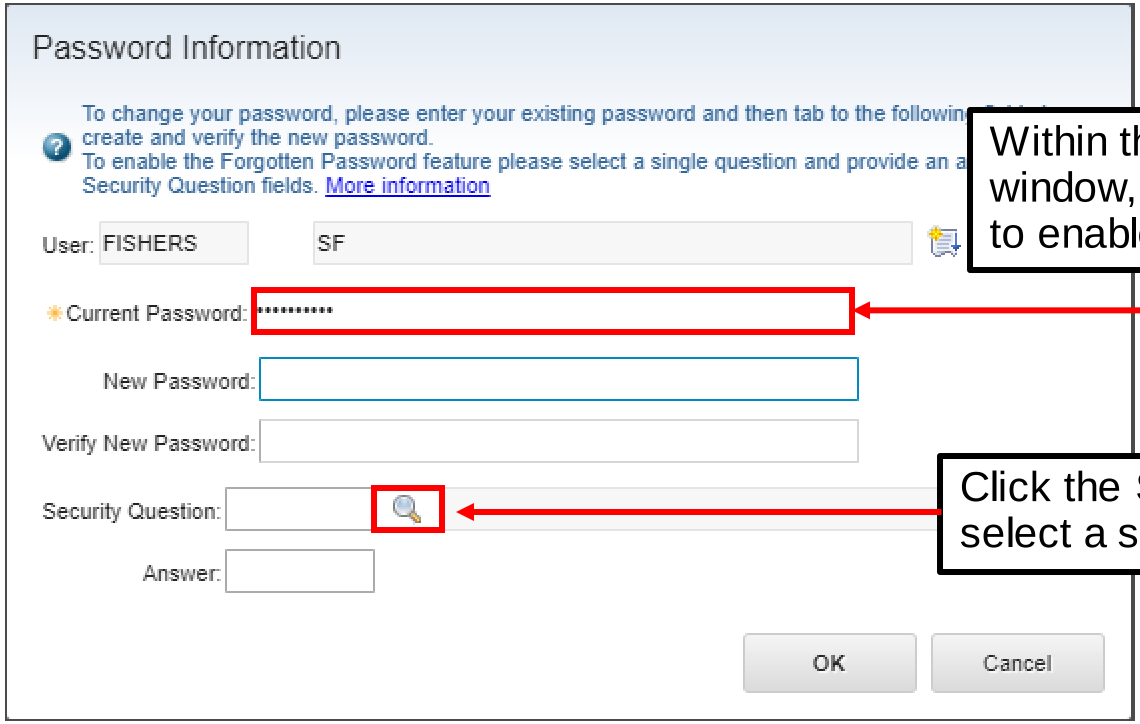
This option can only be used if you have previously completed the **Password Information** section within your ESR Service Desk account.

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**.

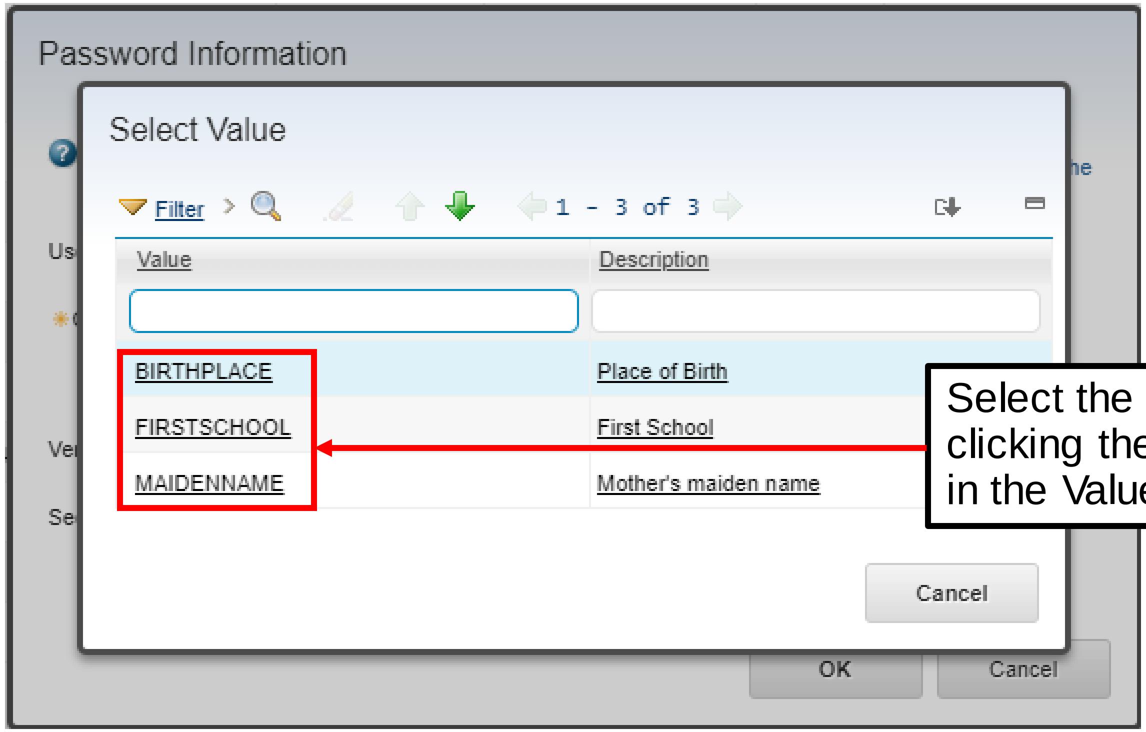


Within the Password Information window, enter your **Current Password** to enable the Security Question field.

Click the **Search** icon to select a security question.

Password Information

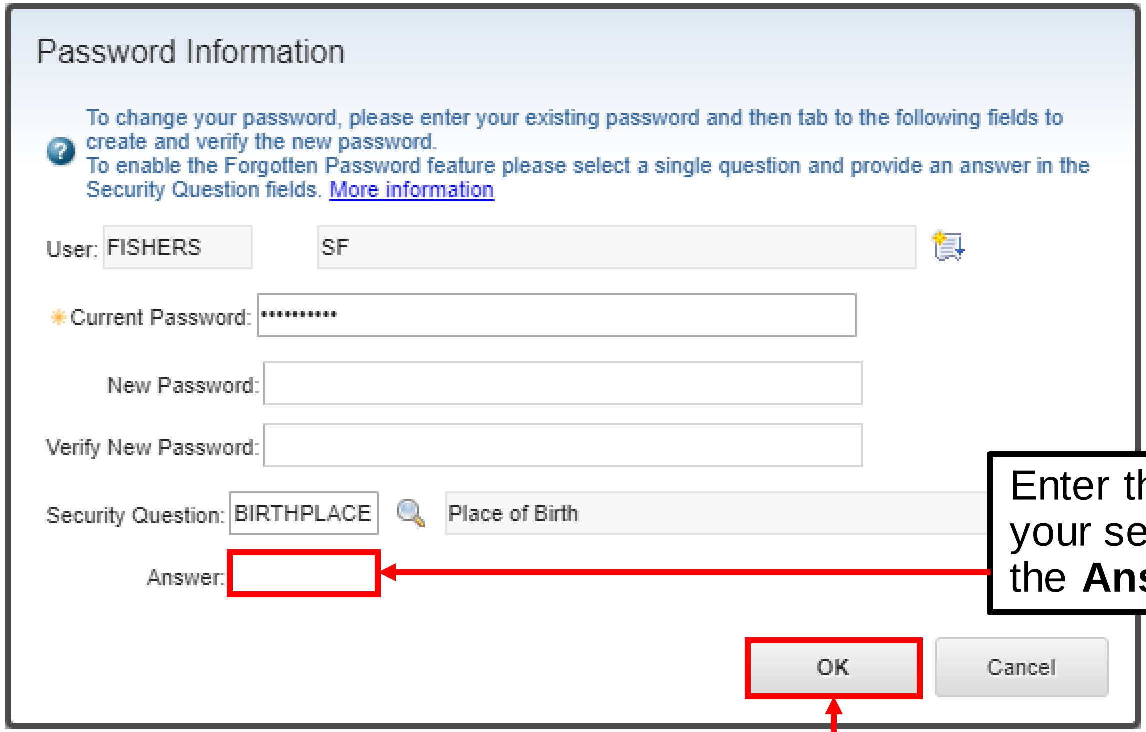
The following options are available:



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



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

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

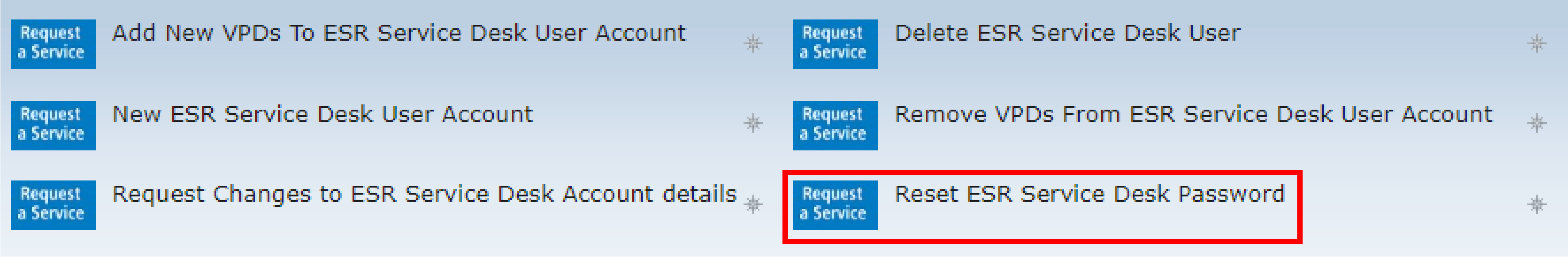
With your password information recorded you can use the **Forgot Password** link, on the ESR Service Desk homepage, to request a new password.

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**.

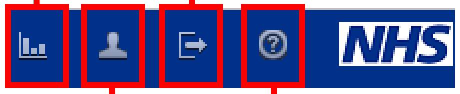
A toolbar is displayed at the top of the page with the following options:

Reports

Click this icon to generate usage reports.

Sign Out

Click to sign out of the ESR Service Desk.



Profile

Click this icon to manage your personal and password information.

Help

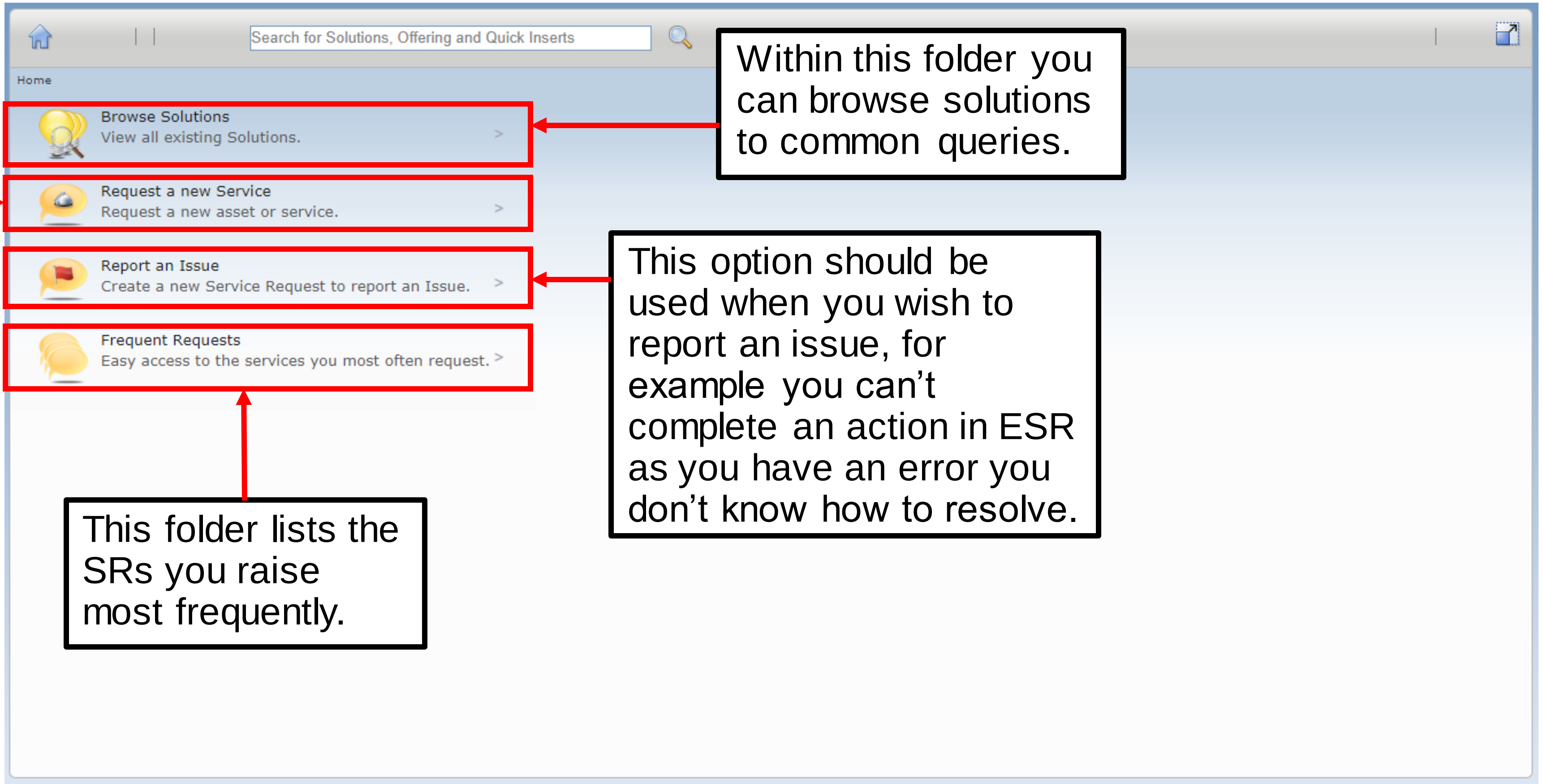
Click to launch the service desk help pages.

Navigation and Portlets

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

Main Portlet:

This option enables you to request a service, for example a mass update in ESR.



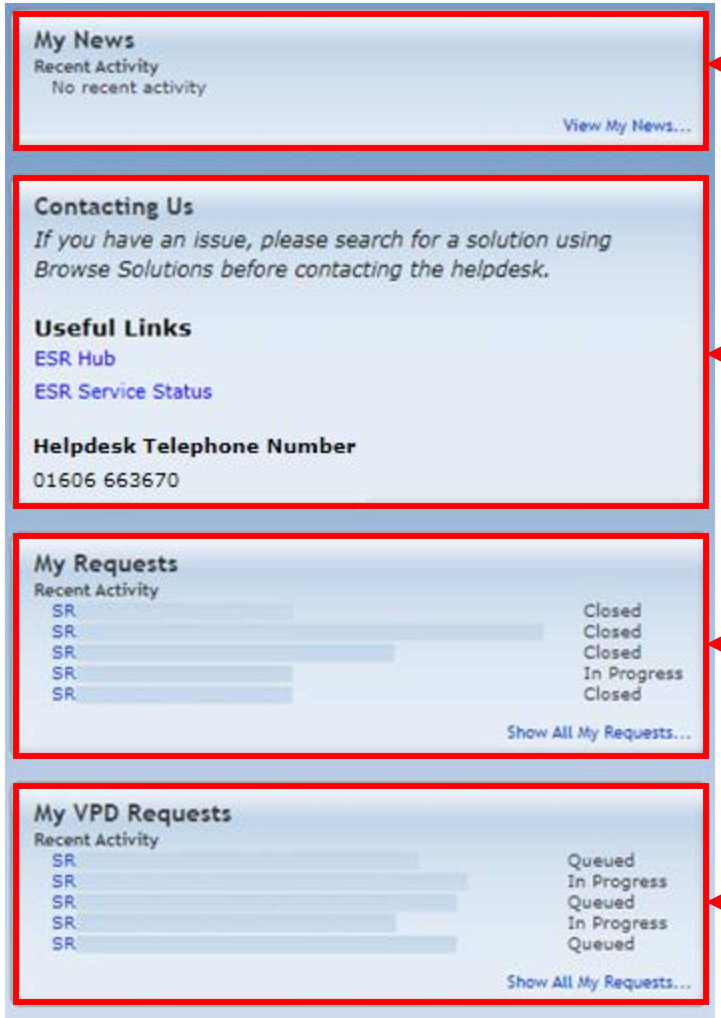
Within this folder you can browse solutions to common queries.

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.

This folder lists the SRs you raise most frequently.

Navigation and Portlets

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



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.

Useful Links

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

My Requests

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

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.

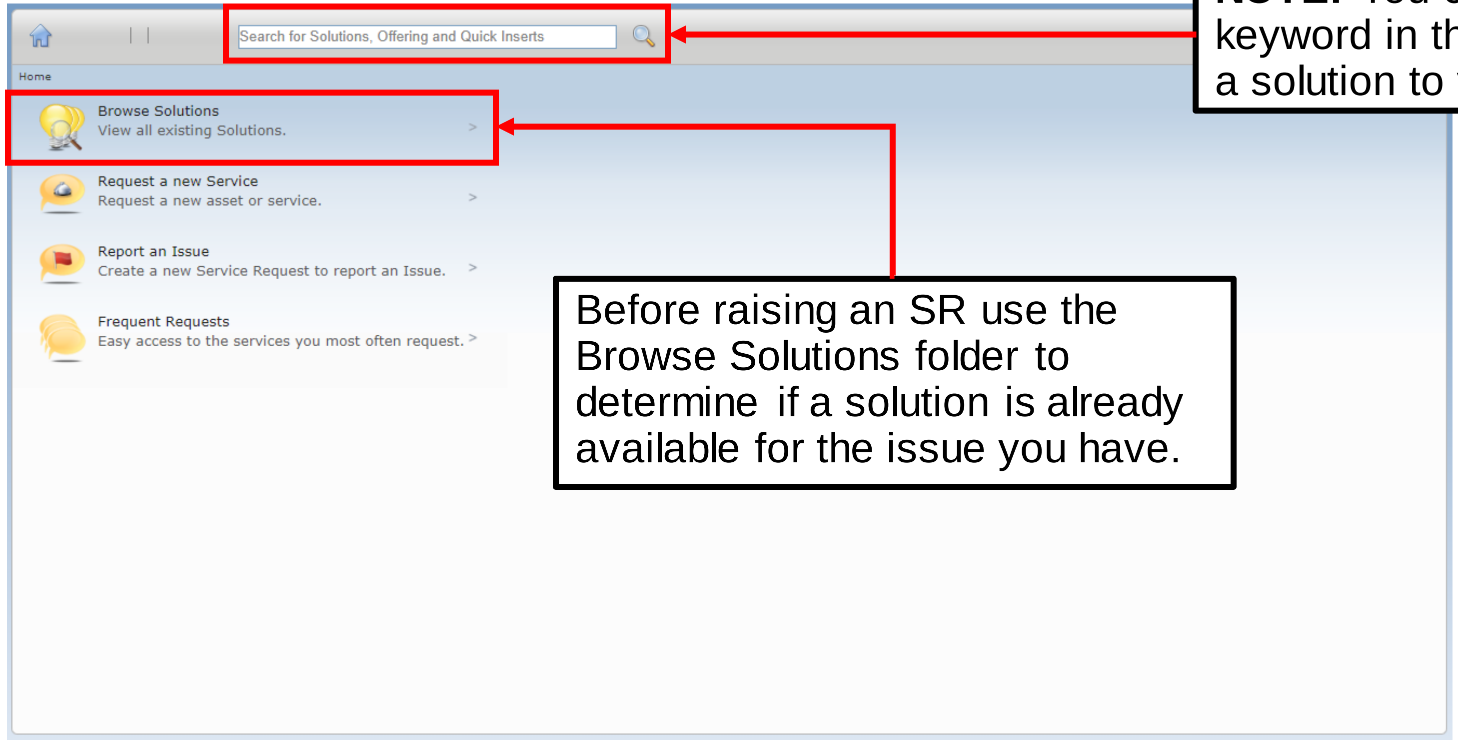
Answers will be added to the presentation slides on the ESR Hub.

Raising a Service Request (SR)

Raising a Service Request (SR)

There are two types of Service Request:

- Request a new Service
- Report an Issue



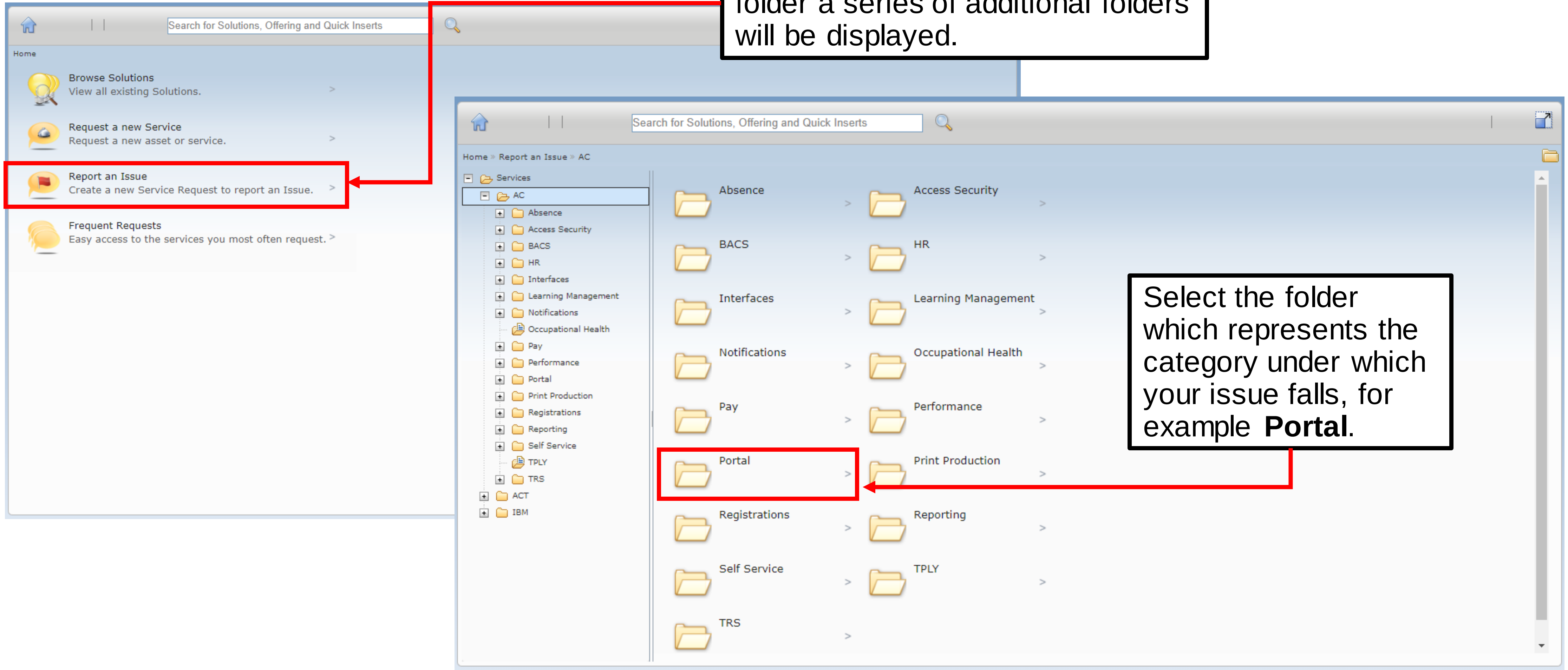
NOTE: You can also enter a keyword in the search field to find a solution to your query.

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

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



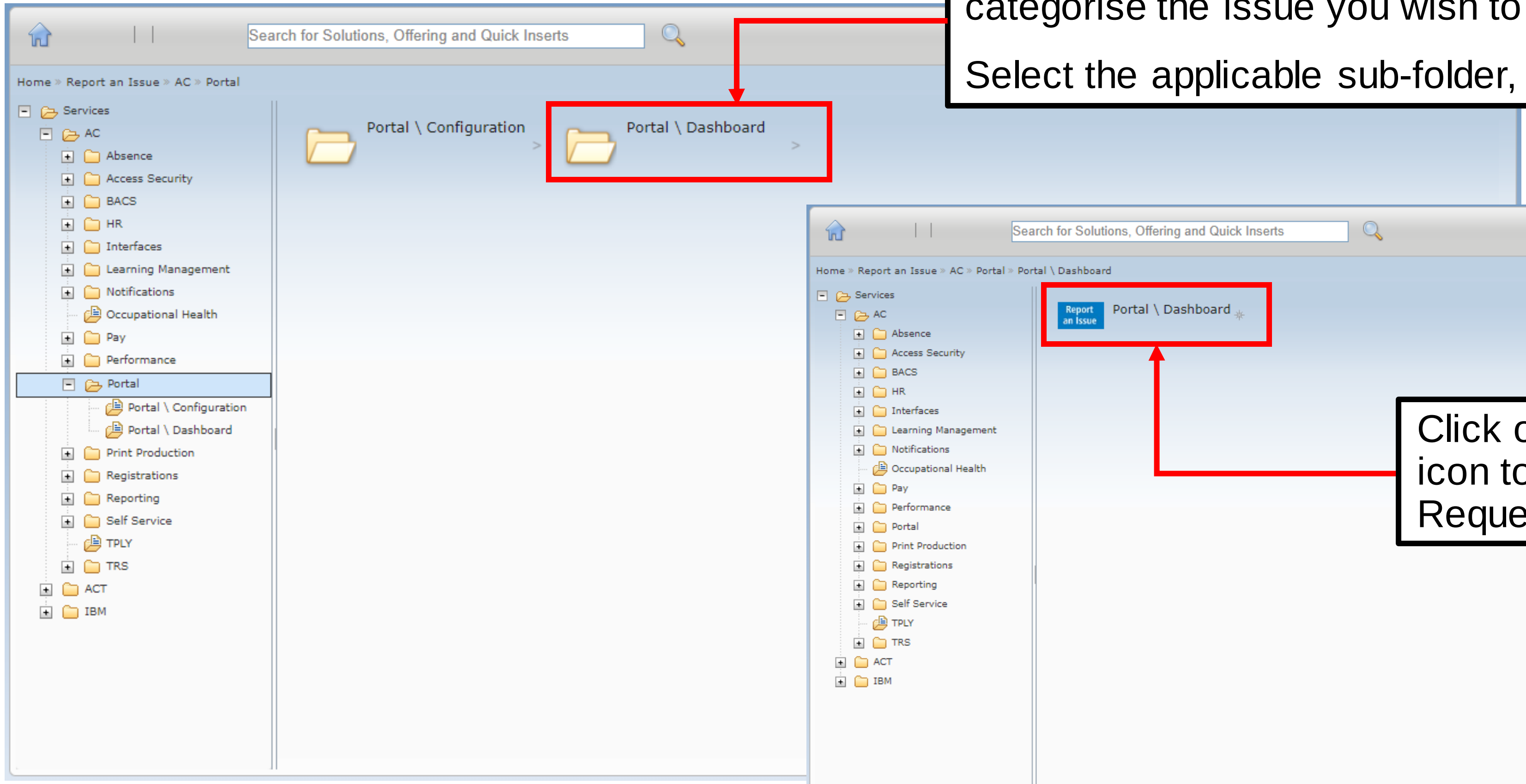
Select the folder which represents the category under which your issue falls, for example **Portal**.

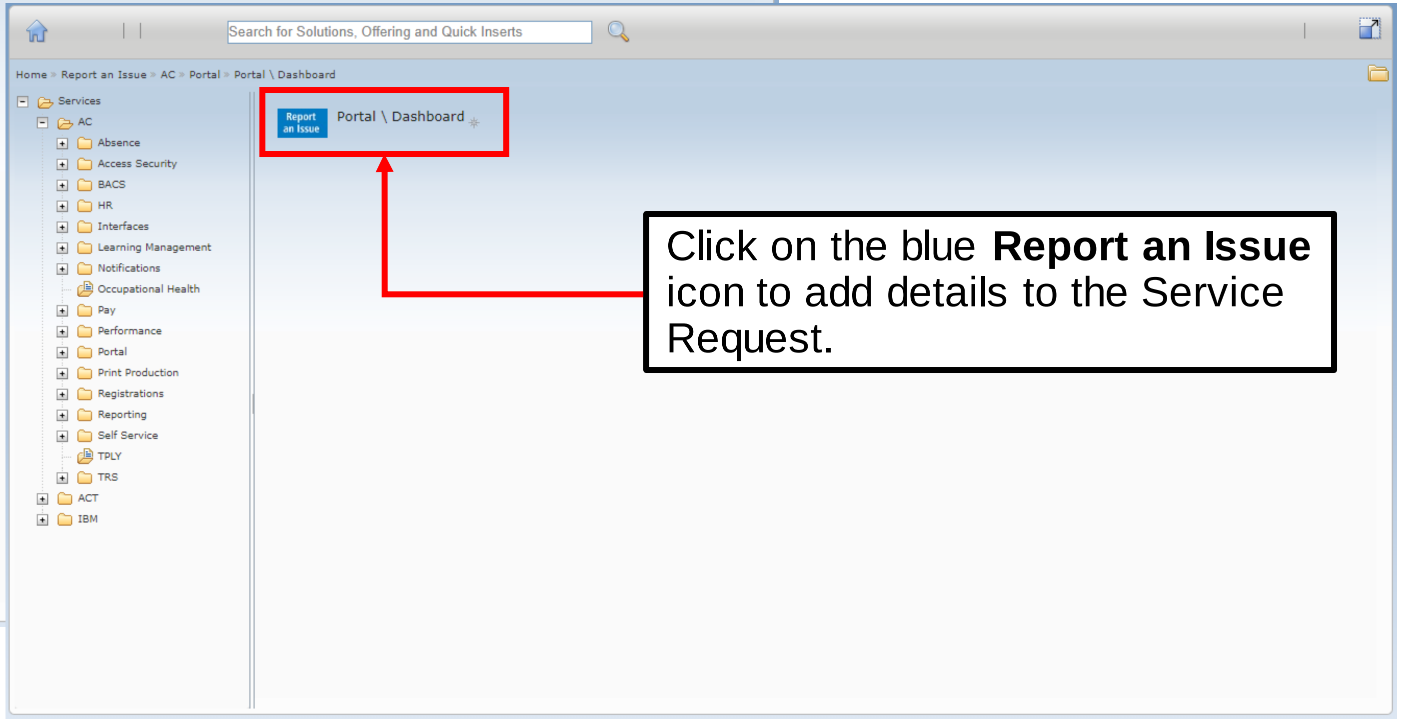
Raising a Service Request (SR)

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**.





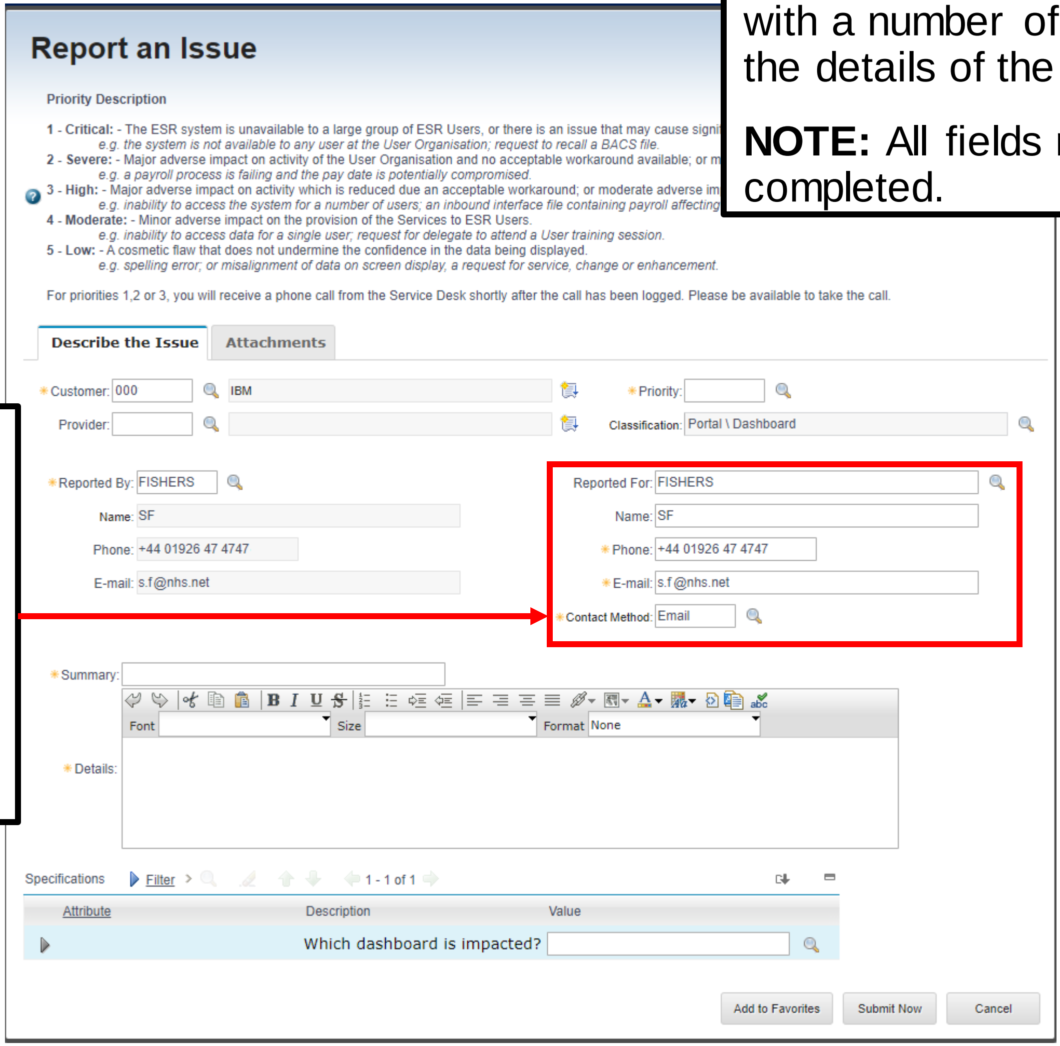
Click on the blue **Report an Issue** icon to add details to the Service Request.

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.

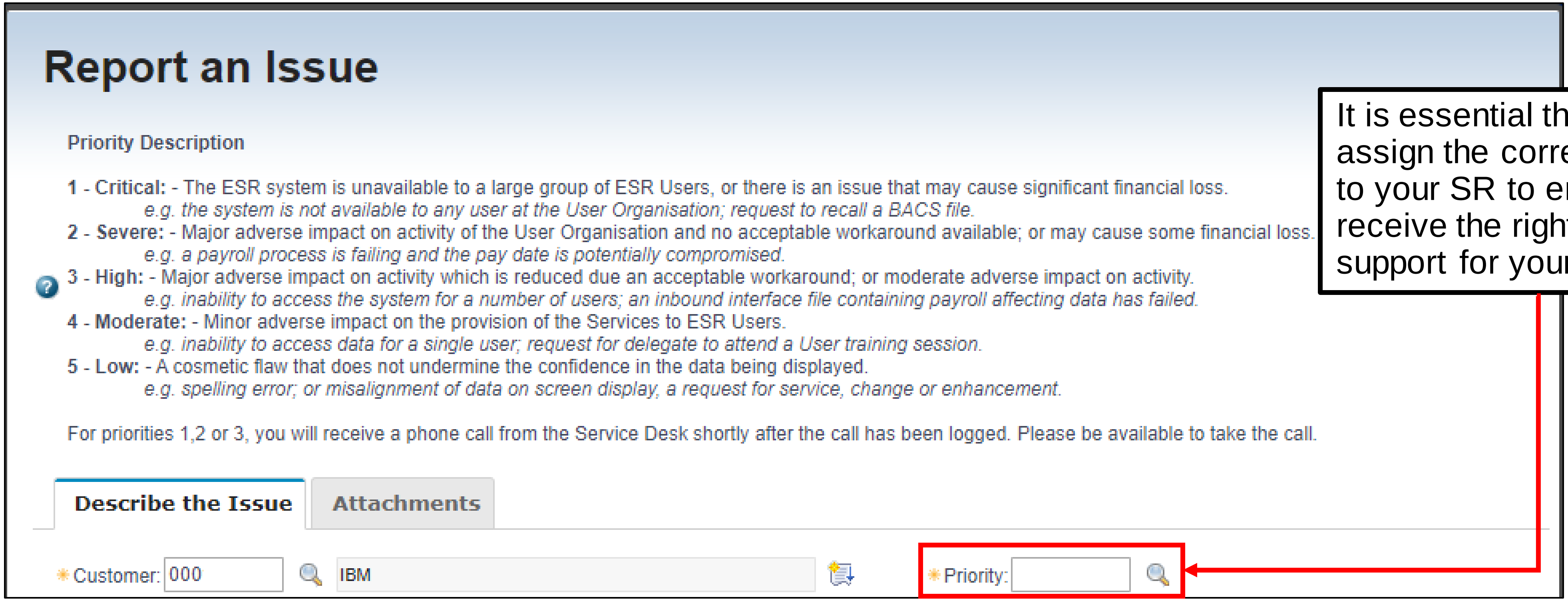
The remaining fields will auto-populate.

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: 000 IBM

*Priority:

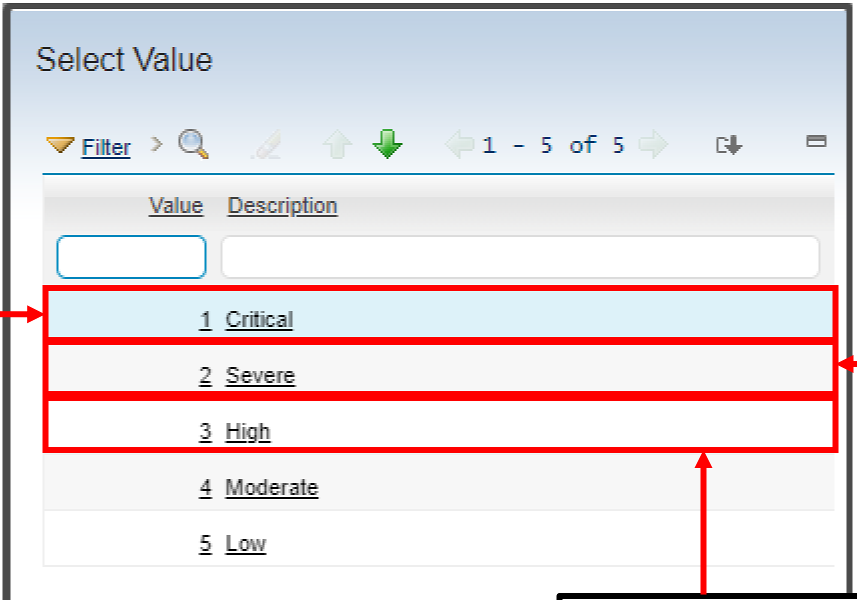
It is essential that you assign the correct priority to your SR to ensure you receive the right level of support for your issue.

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.

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.

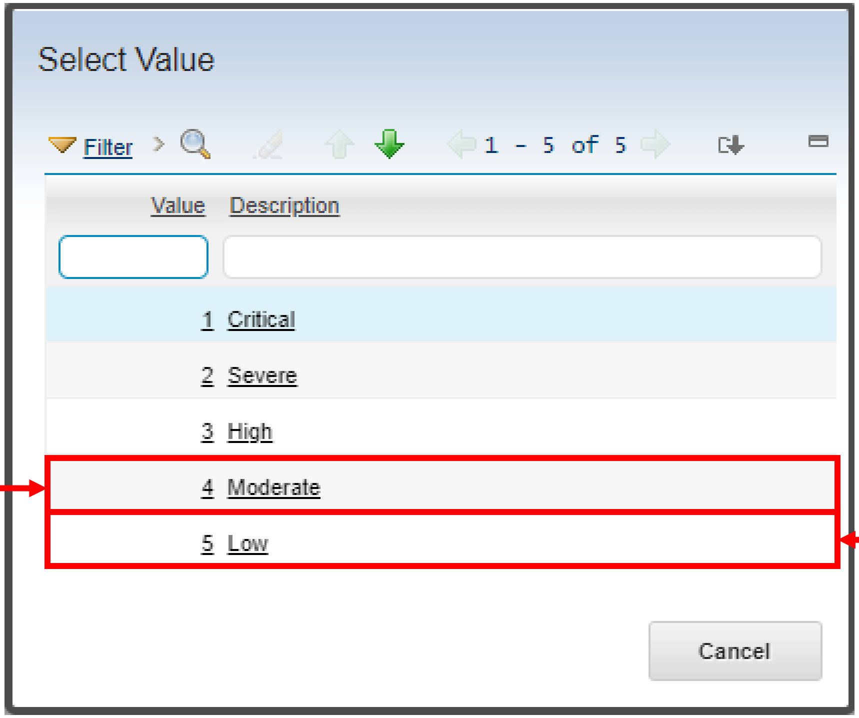
If an SR is raised as a priority 1, 2 or 3 you will receive a telephone call from the Support team therefore you will need to be available to take this call.

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.

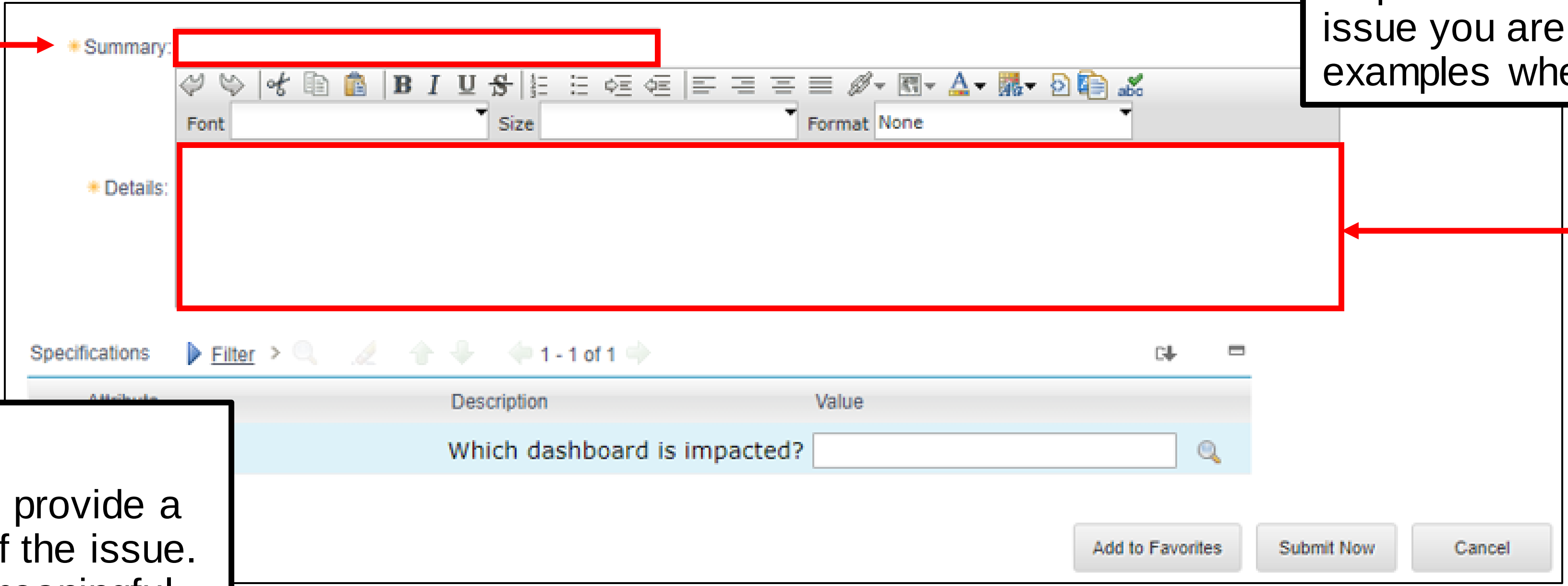


5 Low

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



Details

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

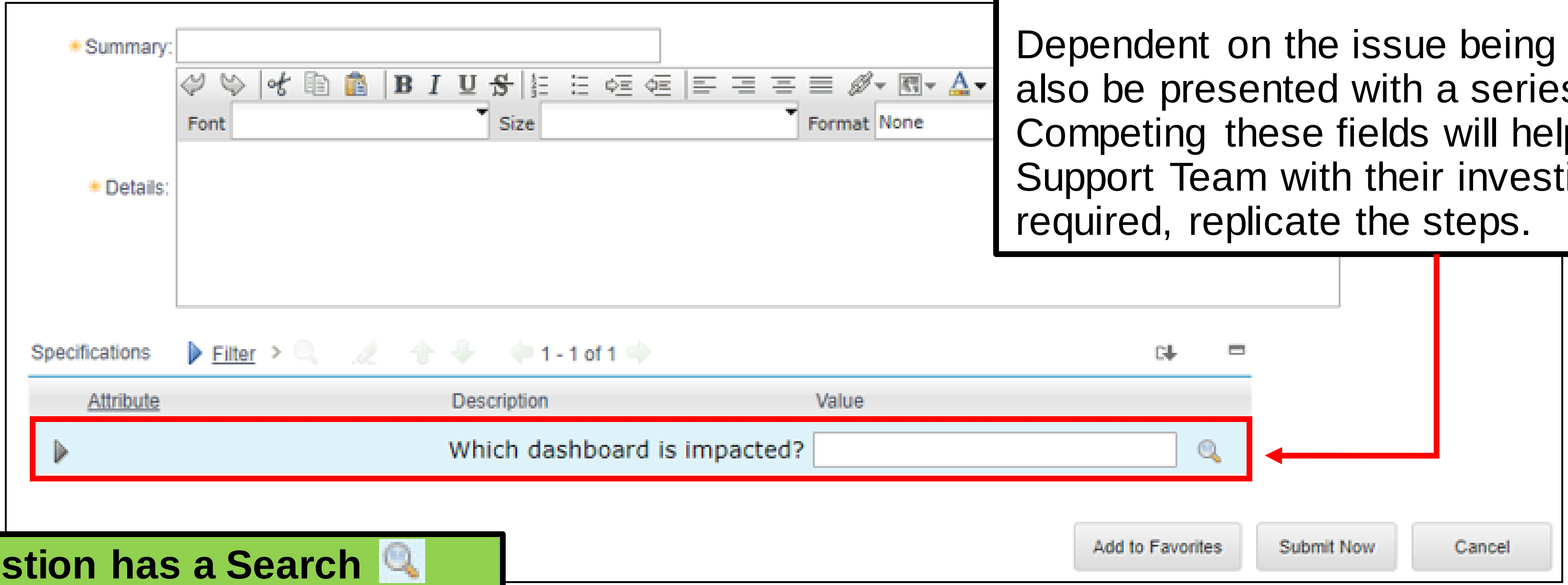
Summary

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



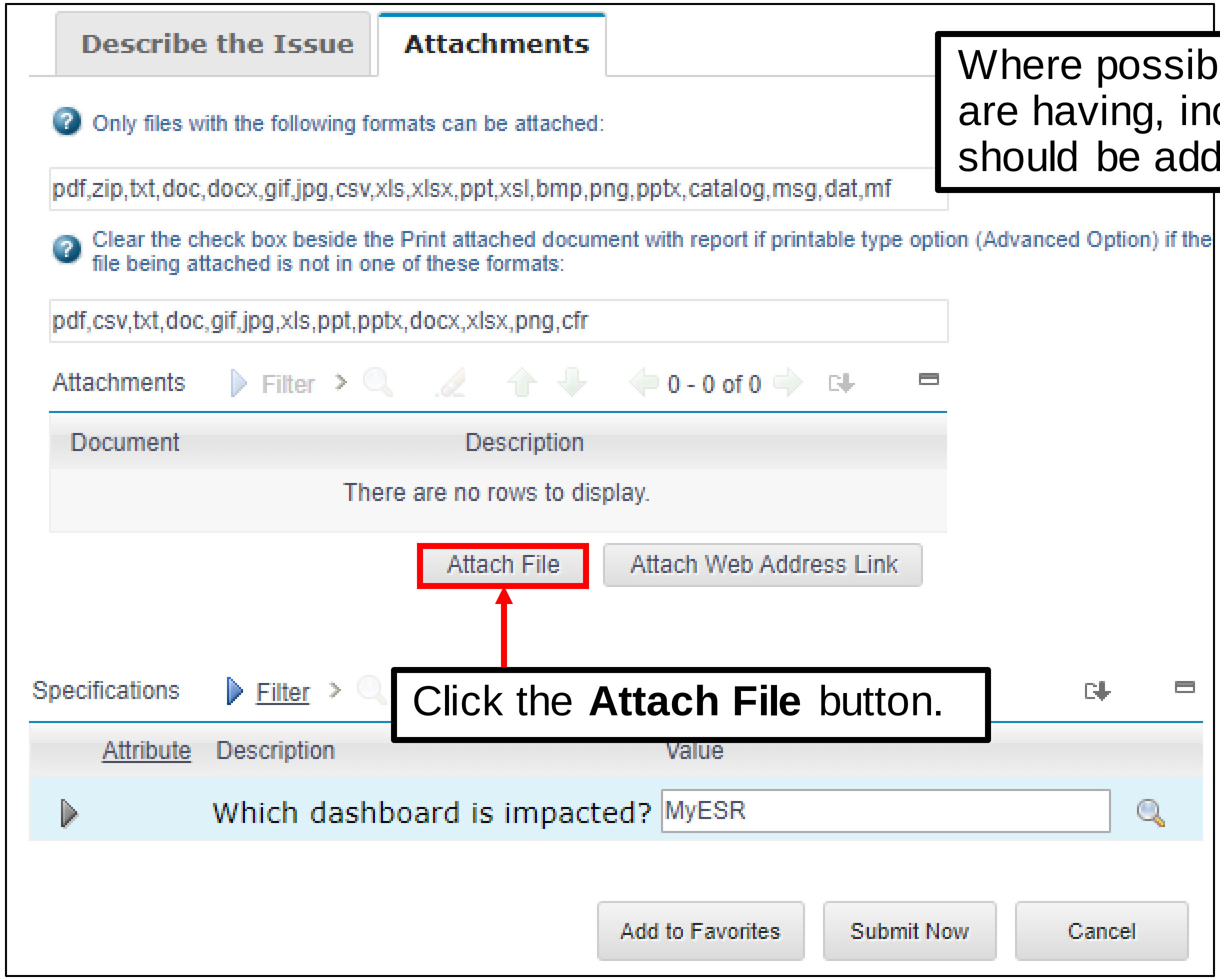
Specifications

Dependent on the issue being raised you may also be presented with a series of questions. Competing 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



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

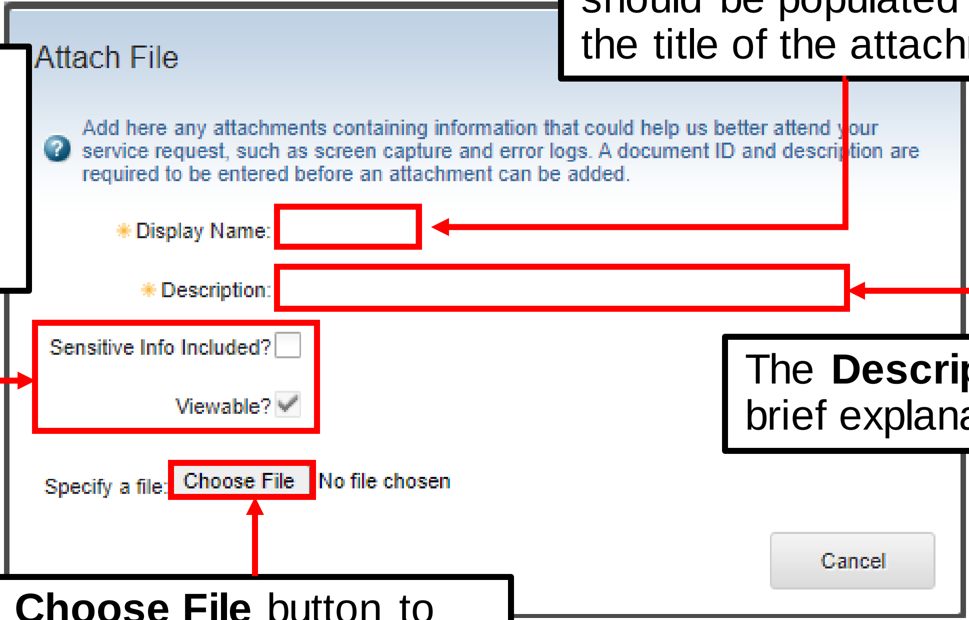
Click the **Attach File** button.

Raising a Service Request (SR)

Report an Issue – Attachments

The **Viewable** checkbox will be ticked by default. The **Sensitive Info Included?** checkbox should also be ticked if applicable.

The **Display Name** field should be populated with the title of the attachment.

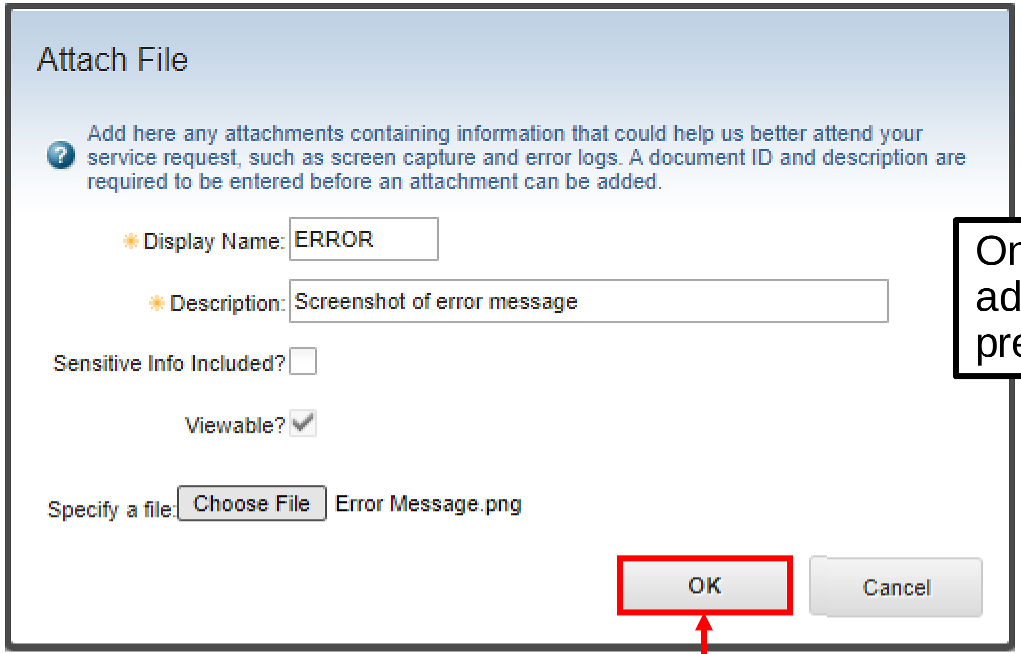


The **Description** field should give a brief explanation of what is attached.

Click the **Choose File** button to browse and select the attachment.

Raising a Service Request (SR)

Report an Issue – Attachments



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

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.

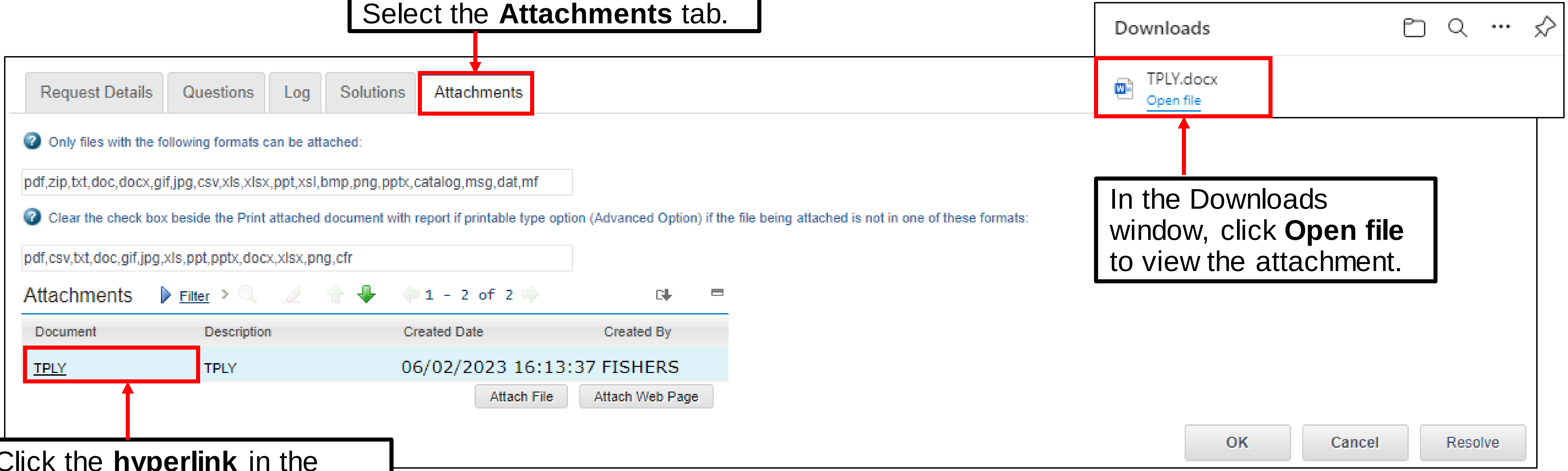
Confirmation of the submission is displayed, quoting the SR number.

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.

Select the **Attachments** tab.

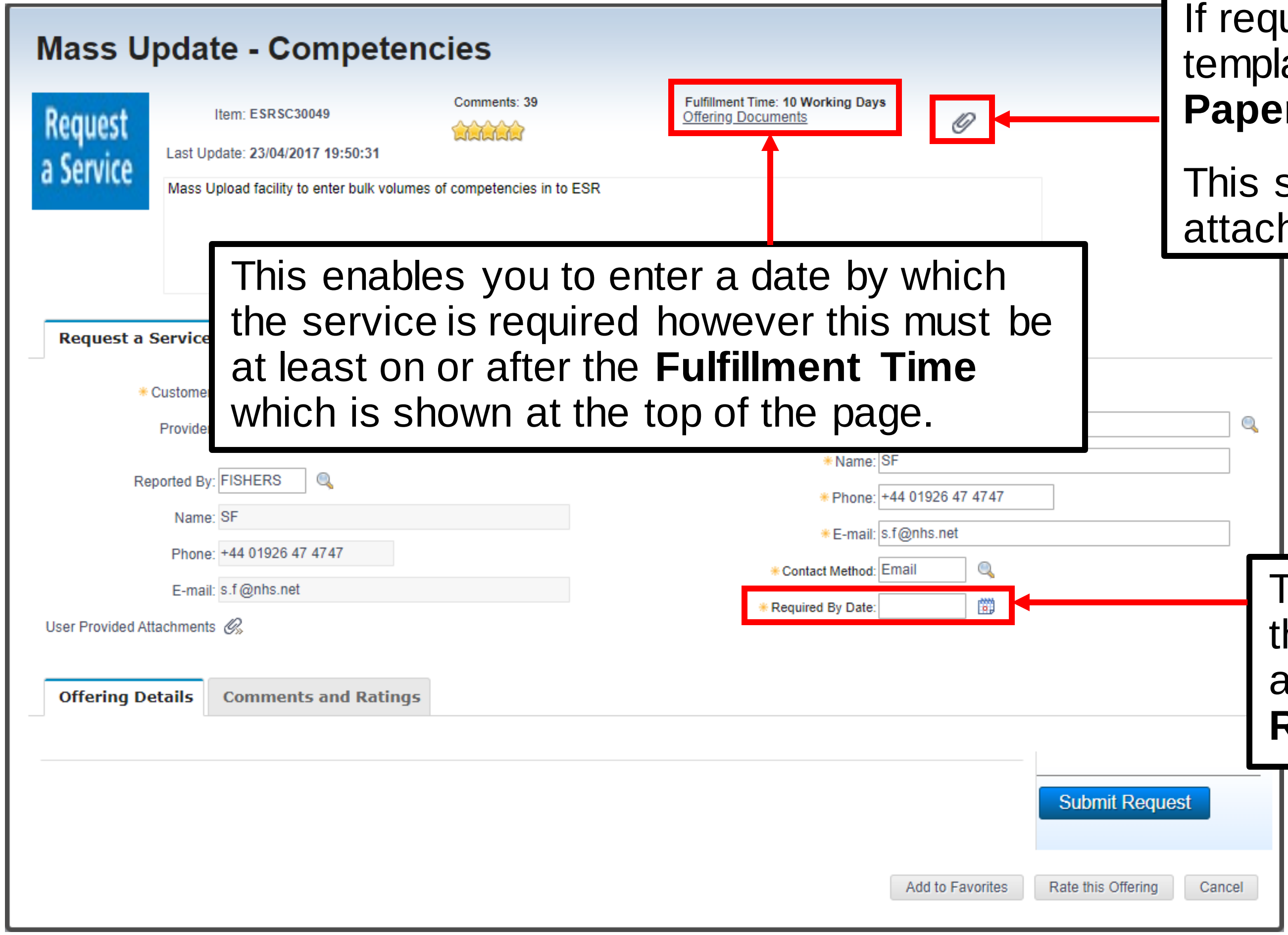


In the Downloads window, click **Open file** to view the attachment.

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

Raising a Service Request (SR)

Request a Service



If requesting a service that requires a template to be completed, click the **Paperclip** icon to access the template.

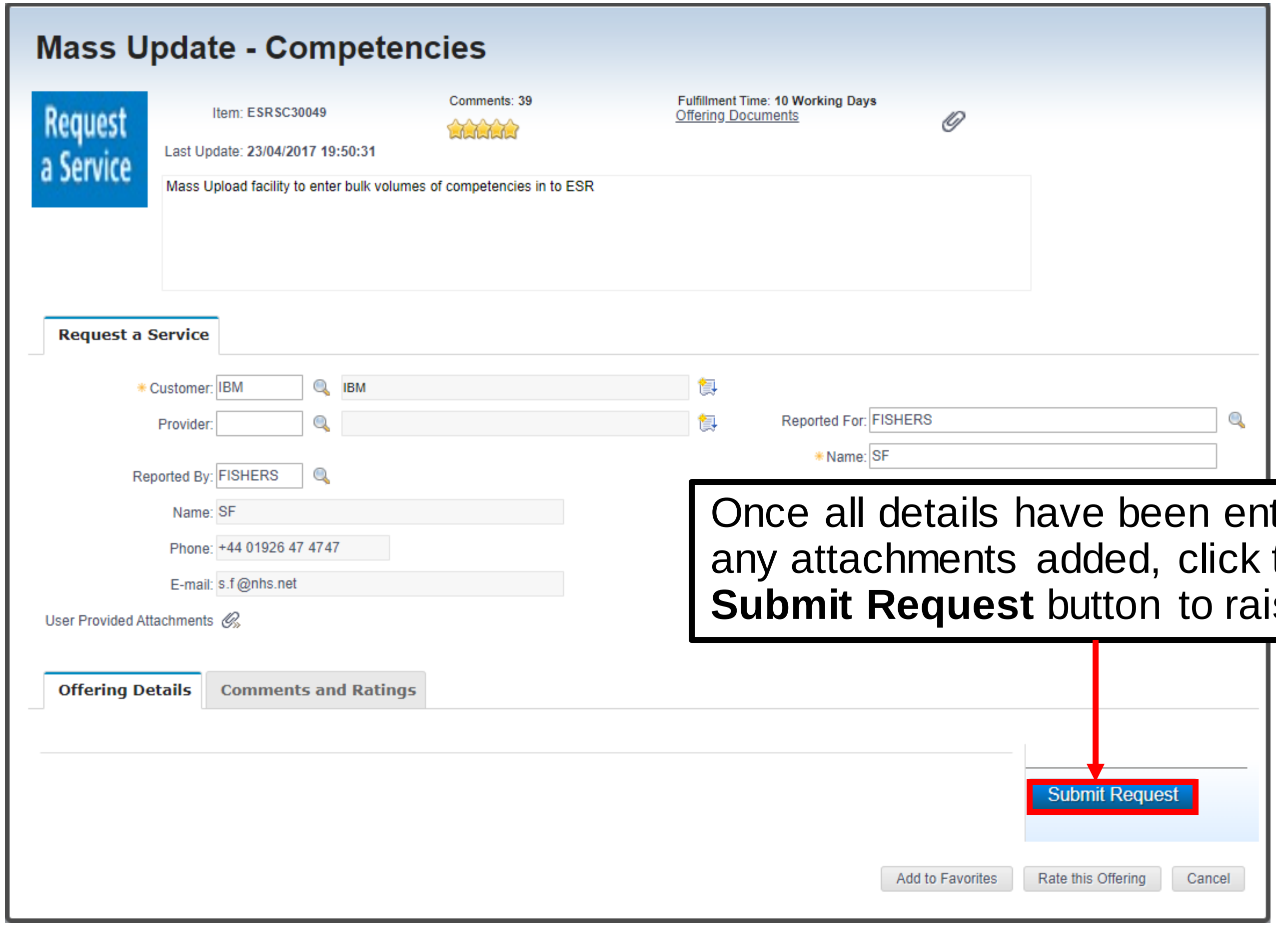
This should be completed and attached to the SR.

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



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….’

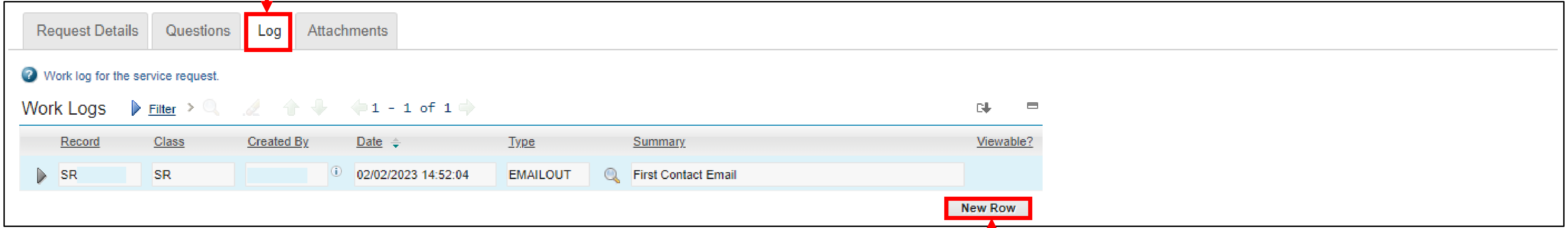
If the format of this heading is changed then the email will not reach either the SR or the Analyst and will delay progress.

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.

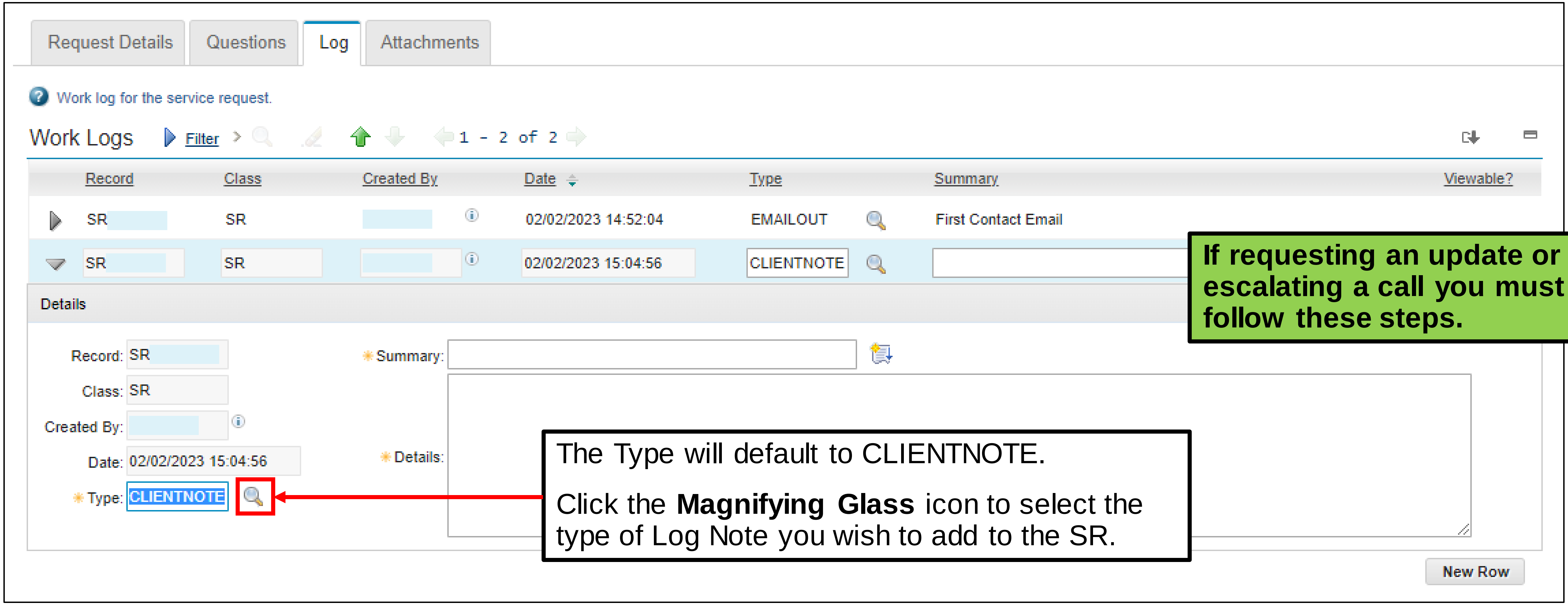
Select the **Log** tab.



Click the **New Row** button.

Managing Service Requests

Request Update / Escalate



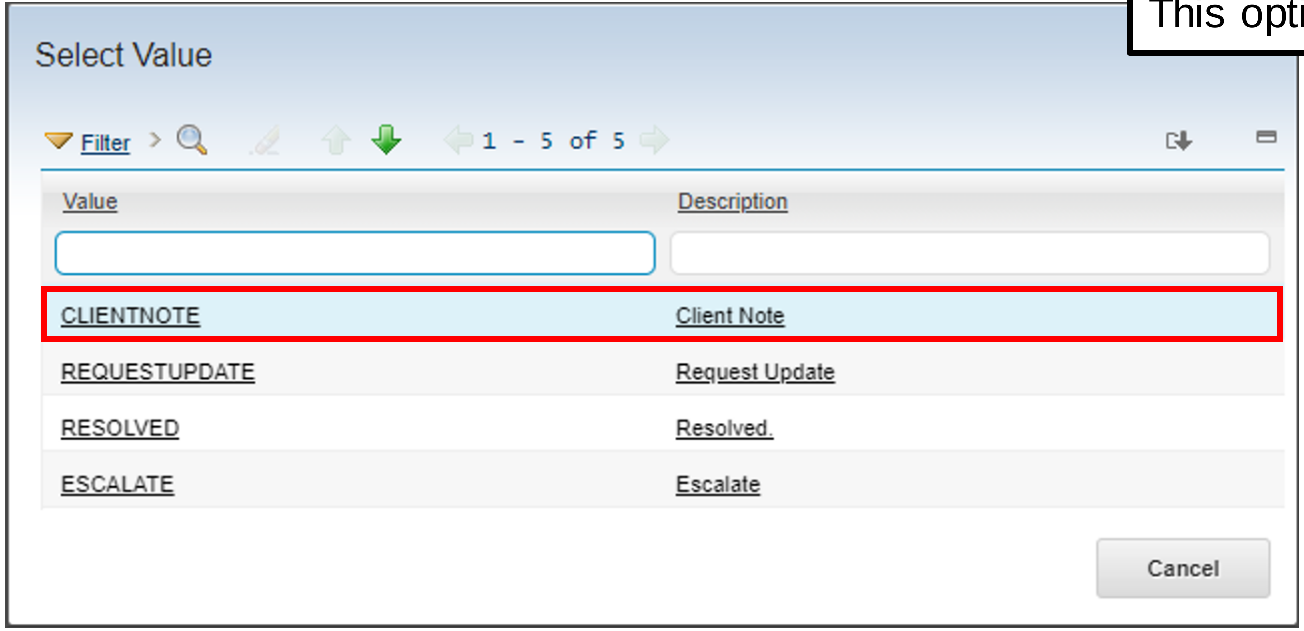
If requesting an update or escalating a call you must follow these steps.

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

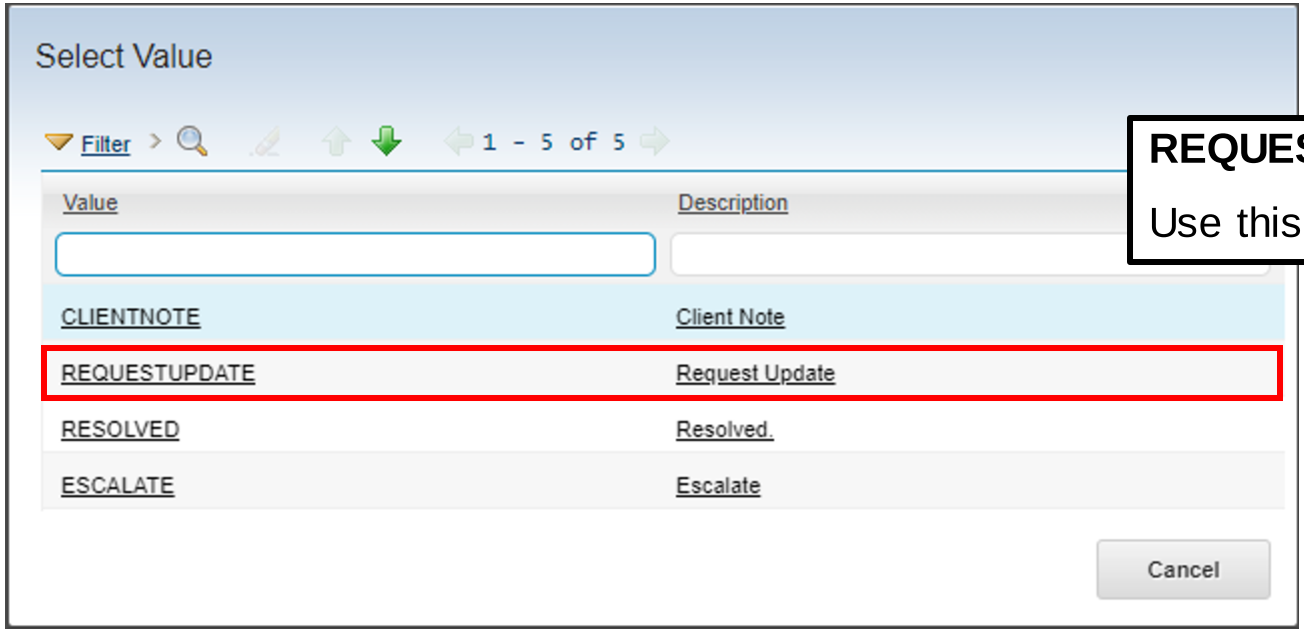


CLIENTNOTE

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

Managing Service Requests

Request Update / Escalate

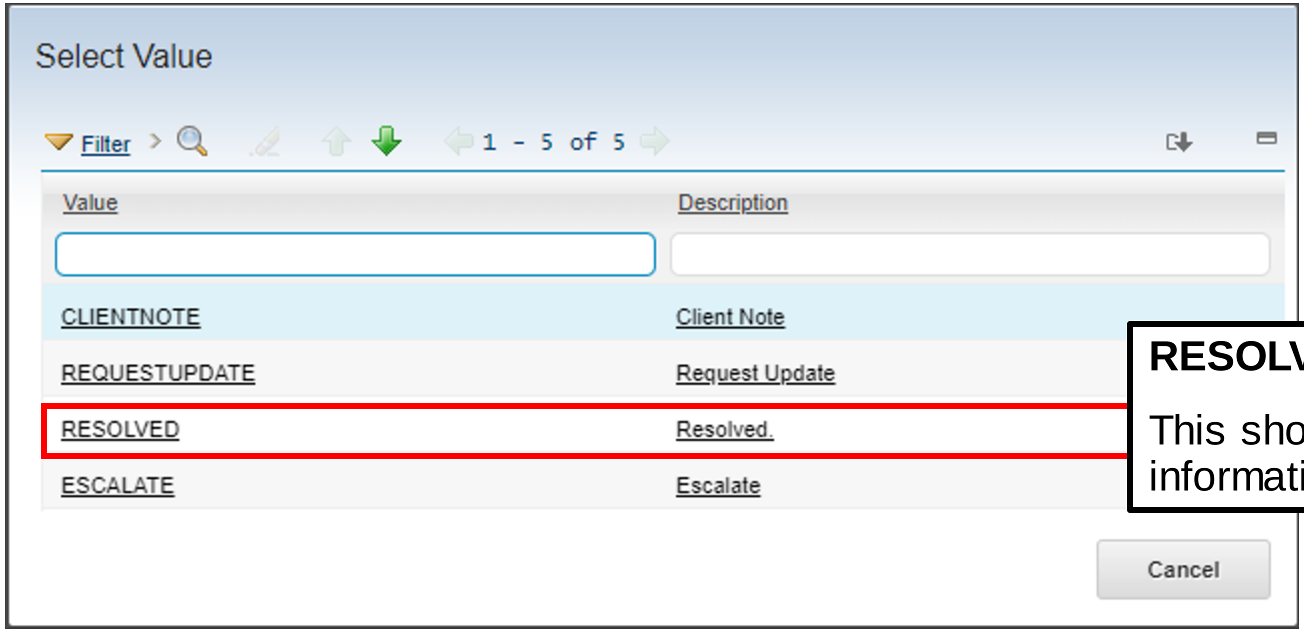


REQUESTUPDATE

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

Managing Service Requests

Request Update / Escalate

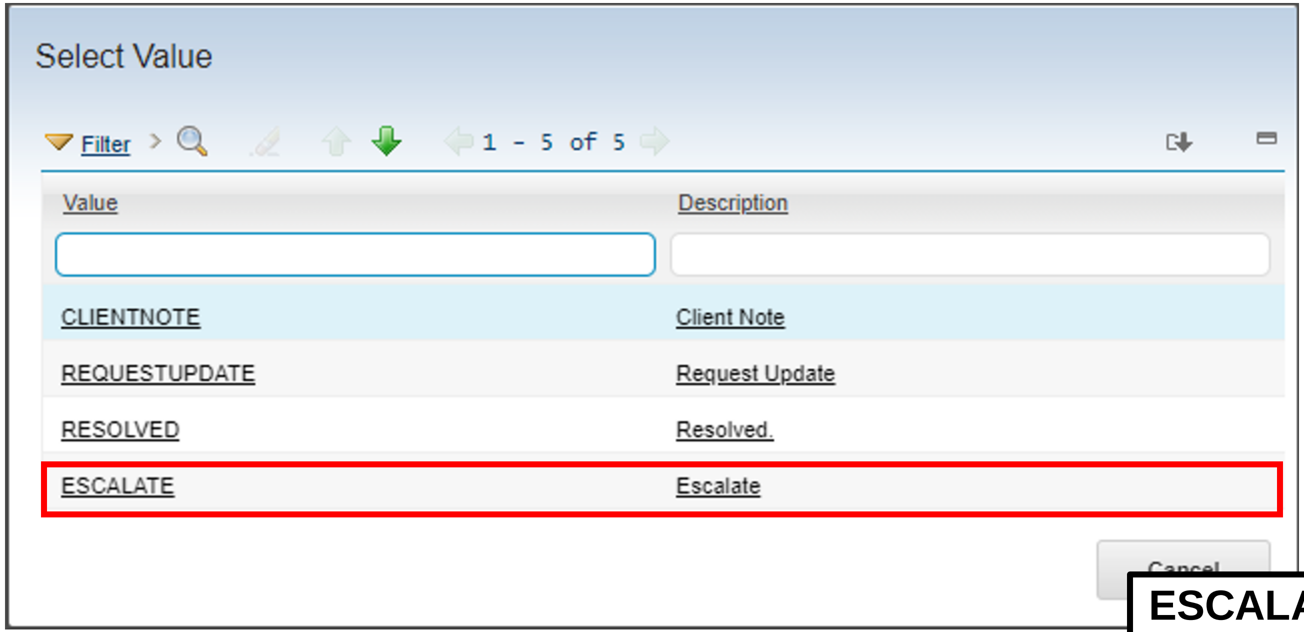


RESOLVED

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

Managing Service Requests

Request Update / Escalate



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.

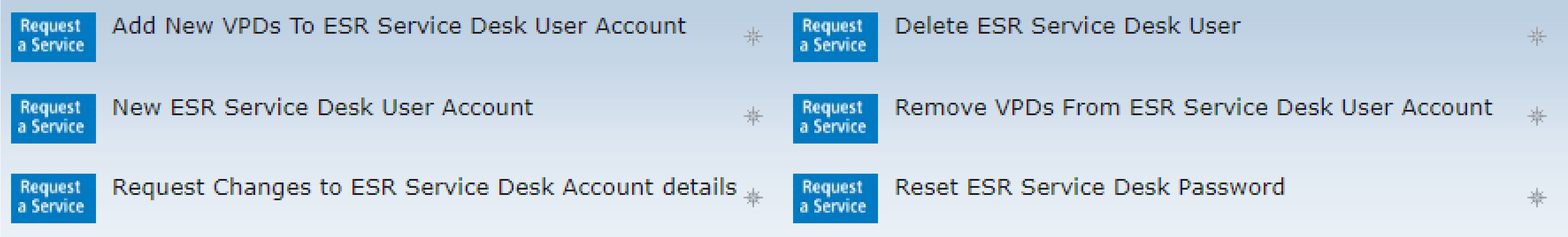
Answers will be added to the presentation slides on the ESR Hub.

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



Questions?

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Answers will be added to the presentation slides on the ESR Hub.

General Enhancement Process

Matt Lye
NHS ESR Development Advisor

ESR Solution Development

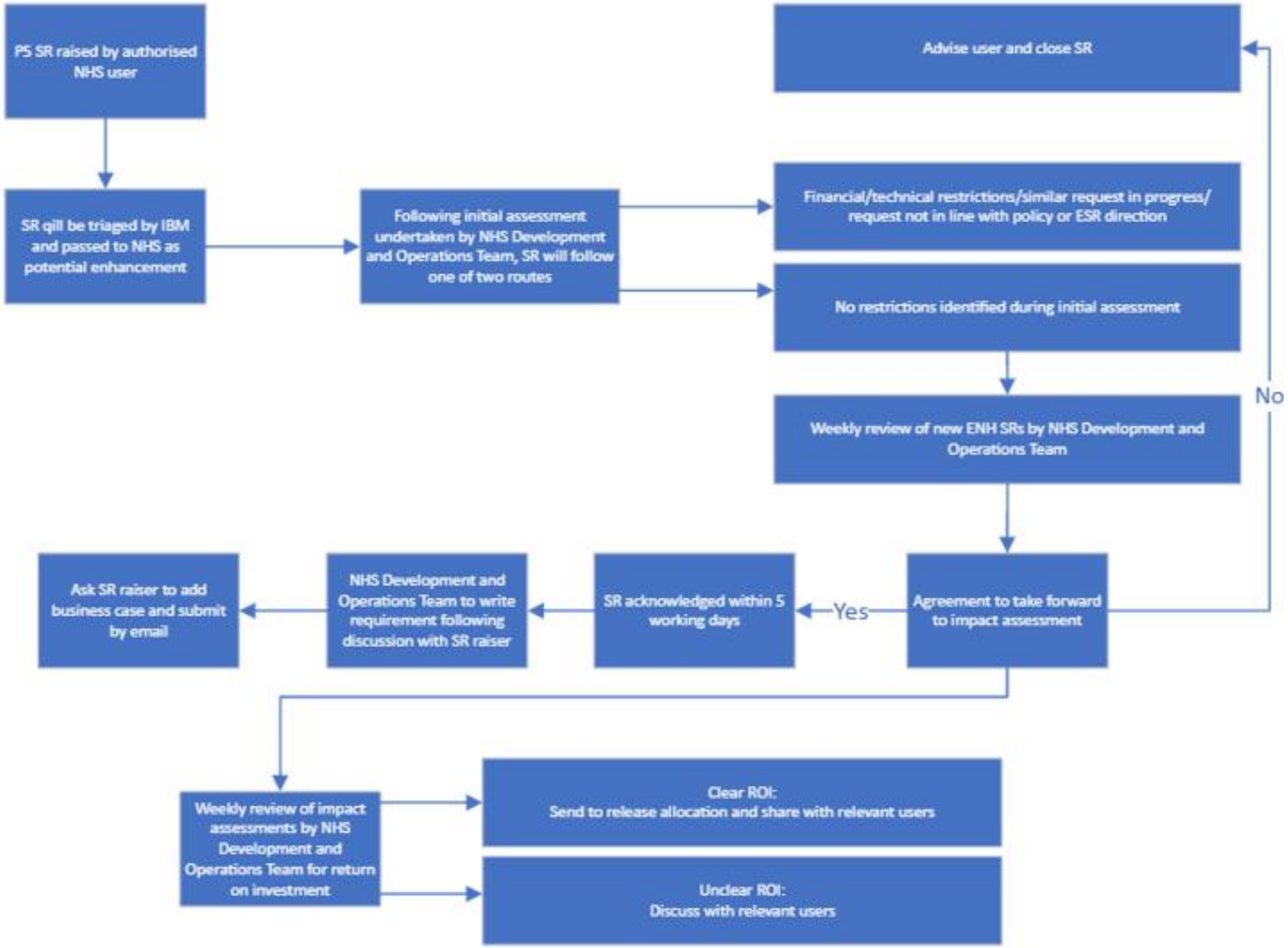
It is essential that any process that identifies and promotes change to the ESR system is clear, transparent, and fully auditable in terms of justification of budgetary spend and value for money. It also needs to be able to react to perceived user needs in a timely and efficient manner.

- 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.

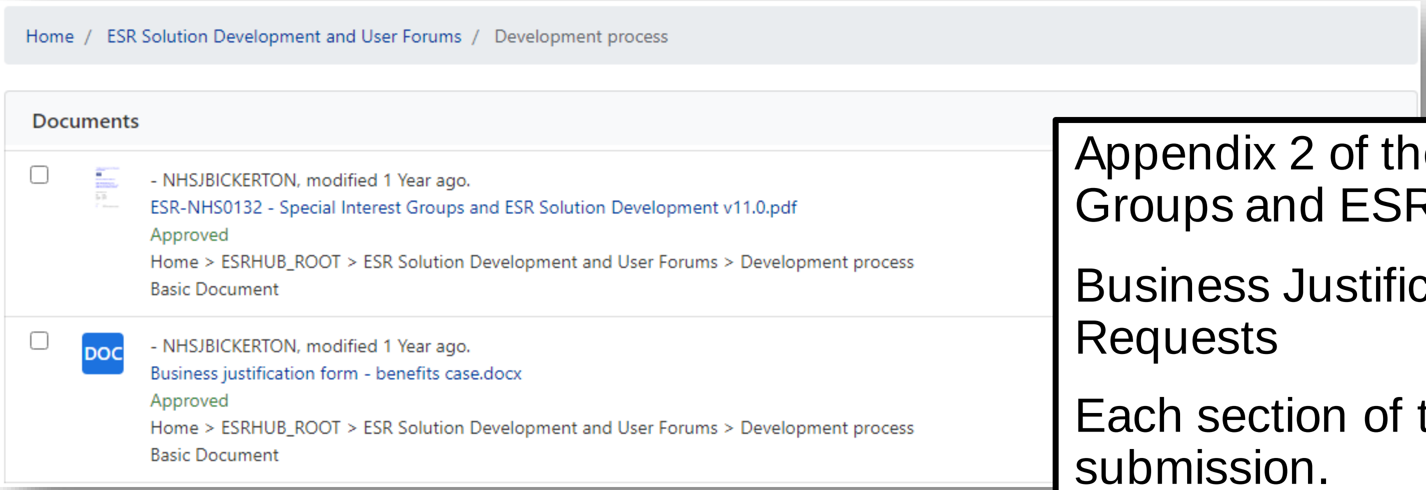
Development Request Process Flow



The Business Justification Form

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

[ESR Solution Development and User Forums/ Development process]



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.

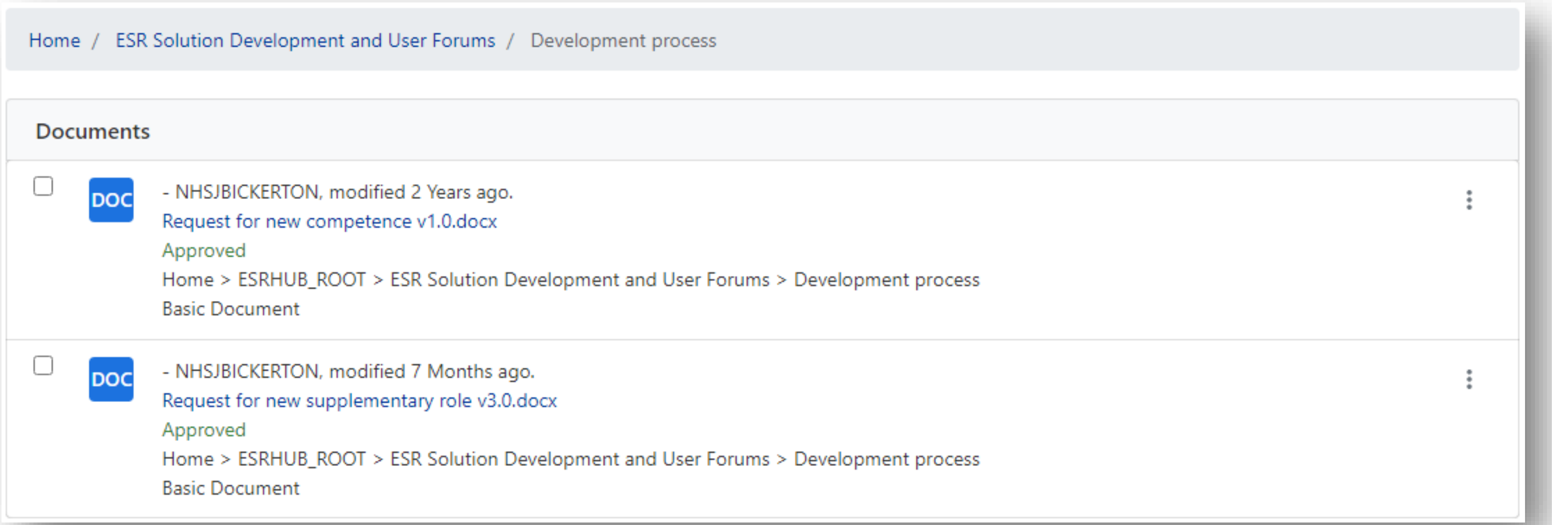
Completing the Business Justification Form

- 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

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

DISCOVER YOUR ESR

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).