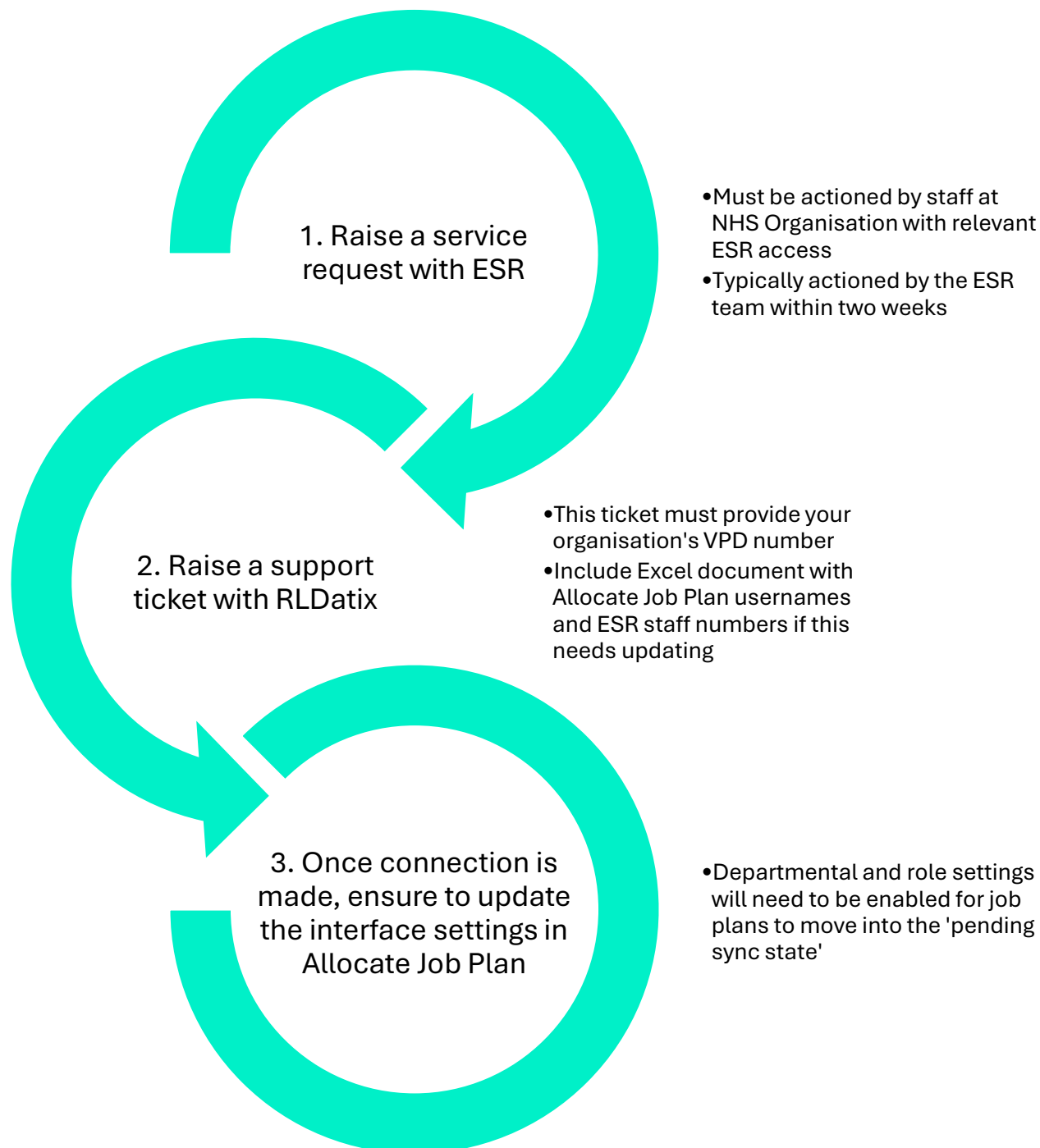


Allocate Job Plan to ESR Interface

Process for getting connected

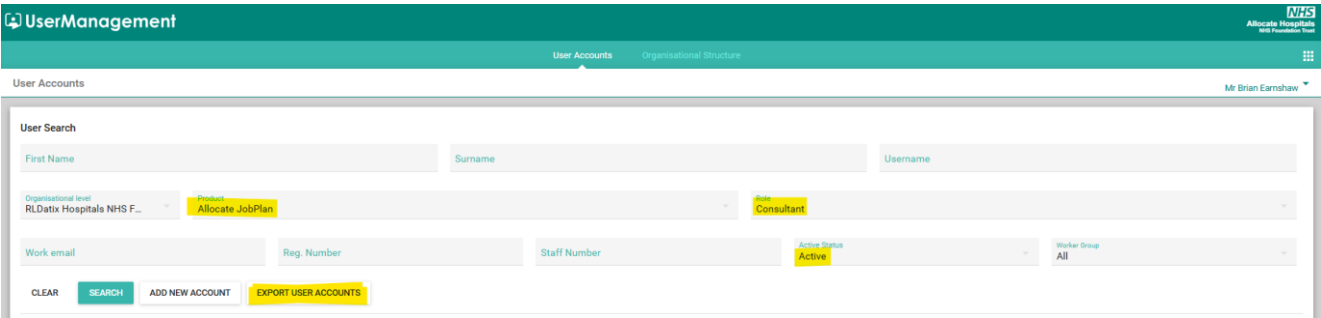
Request Process



Preparing User Accounts

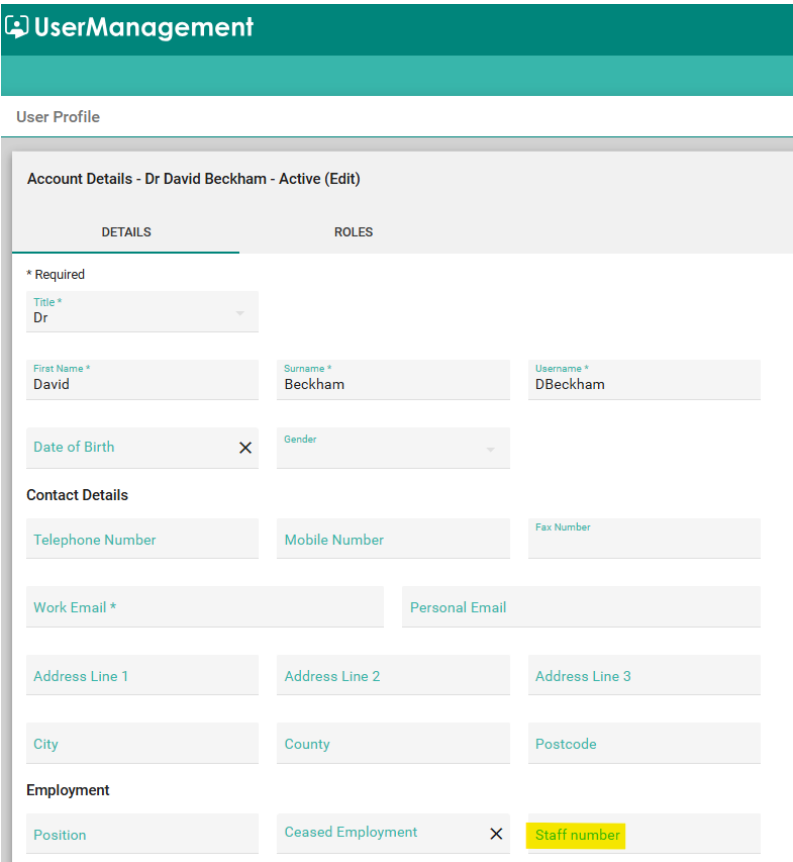
The staff identifier for job plans to flow between systems is the Staff Number (generated in ESR). Without a matching staff number the job plan data will not be able to transfer.

To check if this field has been utilised within Allocate Job Plan already against the user accounts, navigate to the ‘User Management’ portal. From here you can filter the relevant user accounts by selecting a product, role and active status (to ensure only active users are reported on). Once the search is completed you can ‘Export User Accounts’ and within this export you will have the staff member, what their username is and if they have a staff number against their account.



The screenshot shows the 'UserManagement' portal with a teal header. Below the header, there are tabs for 'User Accounts' and 'Organisational Structure'. The 'User Accounts' tab is active. The main content area is titled 'User Accounts' and shows a search interface. The search criteria include: First Name, Surname, Username, Organisational level (RLDatix Hospitals NHS F...), Product (Allocate JobPlan), Role (Consultant), Work email, Reg. Number, Staff Number, Active status (Active), and Worker Group (All). There are buttons for 'CLEAR', 'SEARCH', 'ADD NEW ACCOUNT', and 'EXPORT USER ACCOUNTS'.

When editing a user, you can manually add or amend the staff number.



The screenshot shows the 'UserManagement' portal with a teal header. Below the header, there is a 'User Profile' section. The main content area is titled 'Account Details - Dr David Beckham - Active (Edit)'. It has two tabs: 'DETAILS' and 'ROLES'. The 'DETAILS' tab is active. The form includes fields for: Title (Dr), First Name (David), Surname (Beckham), Username (DBeckham), Date of Birth, Gender, Telephone Number, Mobile Number, Fax Number, Work Email, Personal Email, Address Line 1, Address Line 2, Address Line 3, City, County, Postcode, Position, Ceased Employment, and Staff number. The 'Staff number' field is highlighted in yellow.



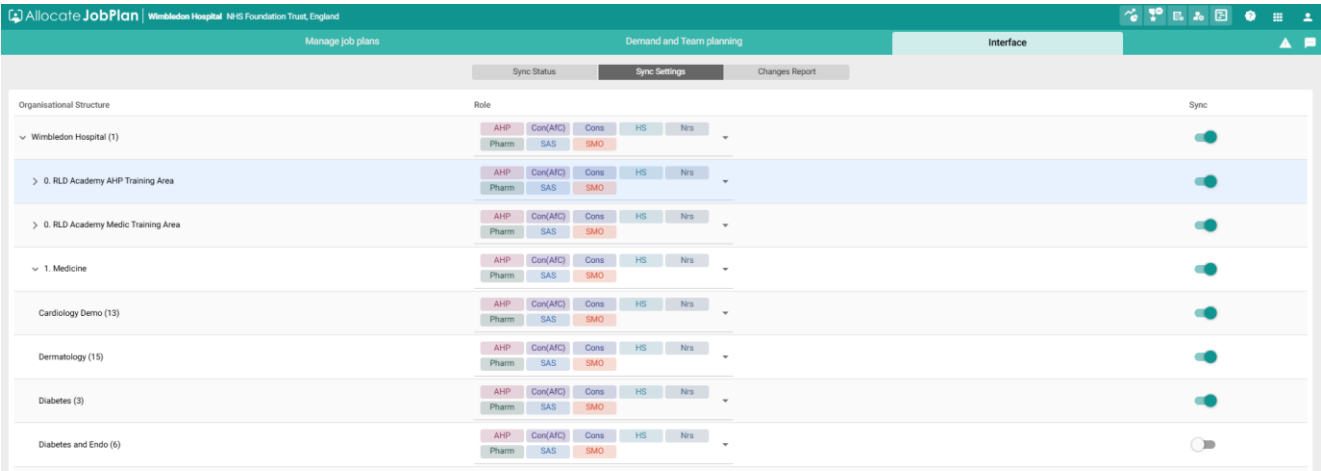
If there is a larger amount of users needing an update, when raising the support ticket request to RLDatix support, you can include an Excel file for updating staff numbers into the system.

The export previously mentioned can act as a template for this but please ensure to remove any non-essential information in the file. RLDatix support only require the username and staff number columns to do this update.

Interface Sync Settings

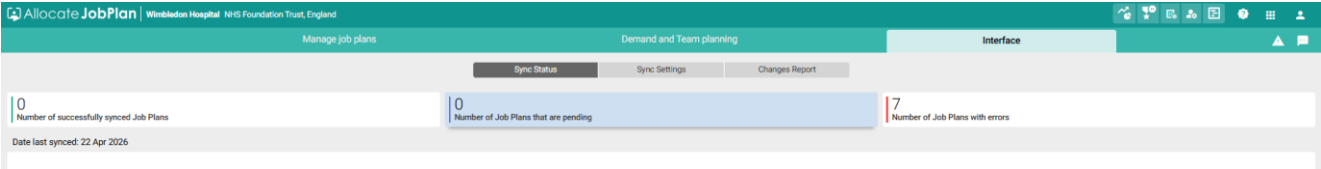
Once the interface has been enabled, staff with Allocate Job Plan ‘Project Manager’ access at the NHS Organisation will need to ensure that any departments where data should be sent across is toggled on and the relevant roles are selected.

This can be done at individual department level or if appropriate at a higher level in the organisations structure.



Organisational Structure	Role	Sync
Wimbledon Hospital (1)	AHP, Con(AIC), Cons, HS, Nrs	☒
0. RLD Academy AHP Training Area	AHP, Con(AIC), Cons, HS, Nrs	☒
0. RLD Academy Medic Training Area	AHP, Con(AIC), Cons, HS, Nrs	☒
1. Medicine	AHP, Con(AIC), Cons, HS, Nrs	☒
Cardiology Demo (13)	AHP, Con(AIC), Cons, HS, Nrs	☒
Dermatology (15)	AHP, Con(AIC), Cons, HS, Nrs	☒
Diabetes (3)	AHP, Con(AIC), Cons, HS, Nrs	☒
Diabetes and Endo (6)	AHP, Con(AIC), Cons, HS, Nrs	☐

Following the above being set any job plan, where the staff member has a matching staff number in Allocate Job Plan and ESR, already in the ‘Signed Off’ or ‘Locked Down’ state will be moved into the ‘Pending’ state and will be included in the next data sync overnight. There will be an overnight sync each day for any further job plans that reached ‘Signed Off’ or ‘Locked Down’ state since the last sync.



Sync Status	Sync Settings	Changes Report
0 Number of successfully synced Job Plans	0 Number of Job Plans that are pending	7 Number of Job Plans with errors

Any job plans where the staff match was successful and the data transferred into ESR will be listed in the ‘Successful’ tab, any that were not able to transfer will be listed in the ‘Errors’ tab with further details around what the fail was to indicate how to move forward.

