

ESR Inbound - Feature Overview

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Overview

ESR Inbound is the second part of the bi-directional interface for the NHS Electronic Staff Record (ESR). For more information on part one, view [ESR Outbound Interface Version 2](#).

The ESR Inbound interface takes the input of ESR Pay elements and transports them all the way through the expenses process, creating an ESR Inbound report fully compiled with compatible claim information ready to export and integrate into the ESR payroll system.

The ESR Inbound report can also be converted into a condensed, summarised file called the Inbound Summary Report. By grouping individual transaction lines into one total figure where possible, processing time can be vastly reduced.

Benefits

- **Seamless Integration** - Continuous flow and update of claim data with minimal admin maintenance after initial set up.
- **Policy Configuration** - Maintain control of your expenses policy and approval process by unifying ESR pay elements with Assure Expenses functionality.
- **Payroll Efficiency** - Compatible financial export readily available, simplifying and streamlining the payroll process.

Features

Features

Feature	Description
Store NHS Trust Details	Create a unique profile to enable bi-directional interface.
ESR Pay Element Mapping	Synchronise ESR Pay elements with Assure Expenses.
Export ESR Inbound Report	Export all processed ESR pay information for the period.
Export Inbound Summary Report	Export a condensed summary of the ESR report.

Implementation

Administrators will require an Access Role with permissions to:

- Imports/Exports
- Tailoring
- Base Information
- Reports

There are several areas within Assure Expenses that require configuration, links to all relevant help guides can be found in the Links section.

1. **Store NHS Trust Details** - Add a unique NHS Trust profile into the system to enable integration between Assure Expenses and ESR.
2. **Create User Defined Fields** - Create and apply UDFs to all relevant expense items in order to enable the mapping of ESR Pay elements.
3. **Map Expense Items to ESR Pay elements**- Connect ESR Pay elements with Assure Expenses in order to build an ESR Inbound Report that encompasses all approved claim information for the period.
4. **Configure ESR Inbound Report** - Create report with calculated columns based on UDF mapping in order to build a comprehensive breakdown of expense items along with additional expense item policy.
5. **Create Financial Export** - Prepare the download of the ESR Inbound Report.
6. **Map NHS Trust ESR Elements**- Map report columns to ESR elements in order to synchronise expense data into an ESR ready exportable file.
7. **General Options** - Configure any additional Inbound options within the General Options page.
8. **Run Financial Export** - Run or schedule the financial Export to download all processed ESR pay information for the period.

Links

Process Diagram	ESR Inbound Process Diagram
Frequently Asked Questions	ESR Admin FAQ
NHS Trust/Expense Mapping	Configure NHS Trust Details Mapping an Expense Item to an ESR Payment Element (NHS) NHS Trust Element Mapping
Reports	Create a Report
Financial Export	Manage Financial Exports
General Information	Create a User Defined Field General Options - NHS Options
