

General Options - NHS Options

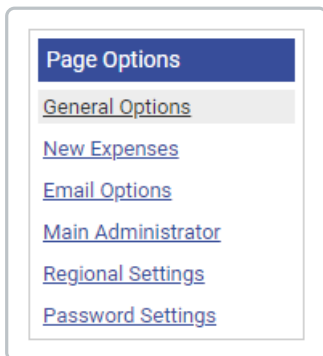
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Permissions

You will require an Access Role with the following permissions:

- General Options

1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.



2. From the General Options menu, click **NHS Options**.

Option	Description
ESR assignment numbers mandatory on employee add	Activate so that ESR assignment numbers are mandatory when adding or editing an employee.
Display with assignment	When a user is adding or editing a claim and they have multiple ESR assignments, this option allows extra information to be shown to identify the ESR assignment. Select from: <ul style="list-style-type: none">○ None○ Paypoint○ Job name○ Position name
Display imported ESR addresses in address search results	If enabled, addresses that have been imported via the ESR interface will be included in address search results.

Option	Description
Create summary ESR inbound file	If this option is selected, the ESR inbound file will be produced as a summary. Otherwise, the file will be produced on an expense-level basis per person.
Rounding for ESR inbound mileage values	<p>Select an option for rounding the inbound mileage fields:</p> <ul style="list-style-type: none"> ○ Always Down - Decimal values will be truncated to export only the whole number. ○ Maths rounding - Decimal values less than 0.5 round down, 0.5 and above round up to the next whole number. ○ Always up - Decimal values always round up to the next highest whole number. <p>This applies to ESR Element field mappings for "claimed mileage", "No of Miles" and "Actual Mileage" only.</p> <p>For more information, view Set the ESR Inbound rounding method</p>

Option	Description
ESR outbound employee activation type	<p>This will set the method of activation, for employees added via the ESR outbound interface import.</p> <p>If manual is set, a task will be created within the 'My Tasks' menu for individuals or teams who have the 'ESR Outbound Import Summary' notification option set on their employee record. This user will then need to activate the employee.</p> <p>If automatic is set, a scheduled task will automatically activate the employee.</p>
ESR outbound employee archive type	<p>This will set the method of archive for employees added via the ESR outbound interface import.</p> <p>If manual is set, a task will be created within the 'My Tasks' menu for individuals who have the 'ESR Outbound Import Summary' notification option set on their employee record. This user will then need to archive the employee.</p> <p>If automatic is set, a scheduled task will automatically archive the employee.</p>

Option	Description
ESR outbound archive grace period	<p>This is the number of days an employee has after their termination date to logon to the system before their account becomes archived.</p> <p>The 'Termination Date' is set under the 'Work' tab within the employee record.</p>
ESR outbound vehicle automatic activation	<p>When selected, this option will automatically activate any valid cars imported from ESR.</p> <p>This creates a scheduled task to activate the vehicle.</p>
Manually set ESR assignment supervisor	<p>When selected, the ESR assignment supervisor is managed within Assure Expenses and will override the assignment supervisor imported in the ESR Outbound file.</p>
Only use primary address for claimant home addresses	<p>When selected, only addresses flagged as 'primary' will be imported for claimants that have multiple home addresses within ESR. If a claimant has only one home address listed, it will be imported by default.</p>
ESR outbound username format	<p>This is a representation of the format that will be set for the username creation from the ESR Outbound import.</p> <p>This option is read only.</p>
ESR outbound home address format	<p>This is a representation of the format that will be set for the home address creation from the ESR outbound import</p> <p>This option is read-only.</p>

3. Click **Save** to confirm or **Cancel** to discard any changes and return to the Tailoring page.
