OLM Developments – ESR Release 25

ESR Release 25 (scheduled for deployment on 2\textsuperscript{nd} January 2015) will bring a range of enhancements to OLM. Driven by feedback received from the OLM user community, discussions with the OLM National Special Interest Groups and feedback from those users attending the OLM training courses offered by the NHS ESR Programme, these enhancements will improve the experience of OLM for learners and Learning Administrators.

This document highlights three of the key OLM developments in ESR Release 25 and details the process changes for organisations to consider before the functionality is available.

Webinar Sessions
To support the OLM developments the NHS ESR Programme will be hosting webinars pre and post Release 25 that will provide further information about the functionality. The sessions are scheduled to take place on the following dates:

- 9\textsuperscript{th} December
- 16\textsuperscript{th} December
- 15\textsuperscript{th} January

Details on how to register can be found at the end of this document.

IAT Competence Management
A new form is available for the management of competencies during the IAT process. This enables an organisation to amend the competencies that transfer as part of that process.

Existing Process
1. Organisation requests IAT for applicant.
2. Stat & Mand (Mandatory & CSTF) competencies transferred pre-hire.
3. ‘Stat & Mand Competencies Ntf’ role holder receives notification of information to be transferred.
New Process
A key difference in the new process is the ability to amend the competencies being received from the previous Organisation. This places more emphasis on the ‘Stat & Mand Competencies Ntf’ role holder.

1. Organisation requests IAT for applicant.
2. Stat & Mand (Mandatory & CSTF) competencies transferred to Stat & Mand Competencies Ntf role holder
3. The role holder can now accept the competencies as transferred or edit them to match the position requirements for the applicant/employee.
**Actions**

<table>
<thead>
<tr>
<th>Action</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign role to users</td>
<td>XXX Local HRMS System and User Administration</td>
</tr>
<tr>
<td>Create local roles if required</td>
<td>XXX Local HRMS System and User Administration</td>
</tr>
<tr>
<td>Apply local role to Organisation DFF</td>
<td>XXX Local Workstructures</td>
</tr>
<tr>
<td>Request Inter Authority Transfer</td>
<td>XXX IAT Initiator</td>
</tr>
<tr>
<td>Approve or edit Stat &amp; Mand Competencies</td>
<td>‘Stat &amp; Mand Competencies Ntf’ role holder</td>
</tr>
<tr>
<td>Ensure Competence Requirements are correct</td>
<td>XXX Career Management</td>
</tr>
</tbody>
</table>

**Considerations**

**Pre-Hire/Final PDS Copy Transfer of Competency Changes**

In allowing the editing of competencies as part of the pre-hire process the automatic transfer of ‘Stat & Mand’ competencies at final PDS Copy no longer occurs where Organisations have allocated the ‘Stat & Mand Competencies Ntf’ Role.

If the role holder does not action the form then no ‘Stat & Mand’ competencies are transferred.

Following the initial updates to Stat & Mand competencies, changes in the source organisation do not update competencies in the target organisation.

**Local Flexibility**

Employers can consider whether the work load will be managed centrally or devolved to departments.

Local roles are assigned on the Organisation DFF and apply to all organisations below it in the hierarchy. Notifications for applicants in Organisations in this hierarchy are then directed to the specified local role holder.

Responsibility still lies with the ‘Stat & Mand Competencies Ntf’ role holder where local roles do not exist for an organisation.
**Waitlisting**

OLM Waitlisting functionality has been changed to allow flexible deactivation and management.

1. **Removal of Waitlisting functionality from classes**

Organisations are given more flexibility in utilisation of OLM Waitlisting functionality. New options to disable Waitlisting at organisation, course, and offering levels are provided. Where Waitlisting is disabled an enrolment end date is automatically added to classes when these reach maximum occupancy. This prevents the class from being returned in Self Service and employees are therefore not to enrol once a class is full.

2. **Option to specify Waitlist Maximum Occupancy**

Learning Administrators are able to specify a maximum number of spaces for the waiting list. Once the limit is reached, the enrolment end date is automatically populated, preventing the class from being returned in Self Service.

3. **Amendment to Waitlisting notification**

The notification that is sent to an employee when added to the Waitlist for a class has been amended to detail other available classes in the same course/offering at future dates, allowing the employee to choose an alternative.

**Actions**

<table>
<thead>
<tr>
<th>Action</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Set Class Waitlist Maximum Occupancy</td>
<td>XXX Learning Administration</td>
</tr>
<tr>
<td>Ensure future classes are created to maximise new notification capability</td>
<td>XXX Learning Administration</td>
</tr>
<tr>
<td>Activate/Deactivate Waitlisting at Course and Offering Level</td>
<td>XXX Learning Administration</td>
</tr>
<tr>
<td>Activate/Deactivate Waitlisting at Trust Level.</td>
<td>XXX Local Workstructures</td>
</tr>
</tbody>
</table>
Considerations

Deactivating waitlisting or setting maximum Waitlisting occupancy does not end date enrolments for classes which are already full.

Learning administrators may need to undertake some administrative tasks dependent on the approach they take to managing waitlisting.

Scenario 1 - Waitlisting active/No Waitlisting Maximum Occupancy set.

No action required.

Scenario 2 - Waitlisting active/Waitlisting Maximum Occupancy set

End date enrolments for all classes where number of waitlisted learners is greater than value.

Scenario 3 - Waitlisting deactivated

End date enrolments for all full classes.

The ESR BI Learning Administration Dashboard - Class Listing Tab can be used to find classes which have a status of full.
Class Administration

A new XXX Class Administration URP has been made available that administers details for the catalogue items the user is associated with:

- The new URP provides access to administer enrolments against classes to which the user has been given access; the user can also schedule classes within the catalogue.
- The existing Learning Administration URP retains rights to set up courses and offerings, but once set up the management of classes within the offering can be undertaken by holders of the new secured URP. Organisations are able to decide locally how access is restricted, and are able to set up appropriate OLM Data Groups using the Local Systems and User Administration URP.
- A new Extra Information Type (EIT) on the individual’s personal HR record details the OLM Data Groups the employee is associated with. Learning Administrators can then highlight specific courses that the employee will be able to update and amend.

For a user with XXX Class Administration to be able to administrate classes:

- The OLM Data Group must be active
- The OLM Data Group must be added to the Person record
- The OLM Data Group must be added to the Offering.

If any of these conditions are not met then the user will be unable to carry out the tasks required.
### Actions

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>Create OLM Data Groups</td>
<td>XXX Local HRMS Systems and User Administration</td>
</tr>
<tr>
<td>Add OLM Data Groups to person records</td>
<td>XXX Local HRMS Systems and User Administration/ XXX HR Admin</td>
</tr>
<tr>
<td>Add XXX Class Administration URP to users</td>
<td>XXX Local HRMS Systems and User Administration</td>
</tr>
<tr>
<td>Add OLM Data Groups to Course Offerings</td>
<td>XXX Learning Administration</td>
</tr>
<tr>
<td>Ensure Offering Resource Checklist is up to date</td>
<td>XXX Learning Administration</td>
</tr>
</tbody>
</table>

### Considerations

**Initial Setup must involve ESR Systems Administrators**

To minimise work for Systems Administrators, identify the courses where Learning Administration can be devolved and the administrators that require the new URP.

Ensure that OLM Data Groups are created for each Offering and added to the Person EIT.

It is then possible to control access to classes by adding or removing the OLM Data Group from the offering.

**XXX Class Administration URP reporting**

It may be necessary to create local reports for Class Administration URP to assist in administrative tasks. Assess the reporting needs and create reports using XXX Disco Ad Hoc, these reports can then be shared with the user by giving them access to XXX Local Reports URP.

### Further Information

Click [here](http://www.electronicstaffrecord.nhs.uk/contact-us/account-managers/) to register on one of the upcoming webinars taking place in December and January.

For more information about the OLM Developments contact your local NHS ESR Account Manager: