

ESR Portal Familiarisation

Manager Guide



April 2017



It's your ESR

ESR Portal Familiarisation – Manager Guide

This guide is intended to provide you with an overview of the Manager Dashboard which is available to users of the Manager, Supervisor and Administrator Self Service responsibilities.

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ET-2043 v1.0

Accessing the ESR Portal

ESR Portal Login Page

The link to access the ESR Portal is my.esr.nhs.uk.

You can use this link to access the Portal via the N3 network.

N3 Login Page:

NHS Electronic Staff Record Login

Log in with your username
Fields with an asterisk (*) are required fields

Username*
(Example: 999JSMITH01)

Password*

[Forgotten Username Or Password](#)

[Log in](#)

Log in with your Smartcard

Access ESR by inserting your smartcard and entering your PIN and then selecting the 'log in via Smart card' button

[Log in via Smart card](#)

Log in with your Remote Access credentials

Access ESR by selecting the 'log in via Remote Access' button

[Log in via Remote Access](#)

You are attempting to access the NHS Electronic Staff Record system (ESR). By entering a password you are confirming your acceptance that you are bound by the Computer Misuse Act, 1990 and any local policies/procedures as defined by your Employer. Usage and access to the ESR solution is audited and action may be taken against any individual attempting inappropriate activity.

[Terms and Conditions](#)
[Password Policy](#)

The N3 Login Page:


- Provides a login via the entry of an N3 Username/Password
- Provides a login via Smartcard for Smartcard users
- Provides a login with Remote Access credentials - this provides users with access to the Portal as viewed via Internet (not N3).
- Provides a link to the forgotten username/password page

Please Note: The Manager Dashboard is not available if accessing the ESR Portal via the Internet.

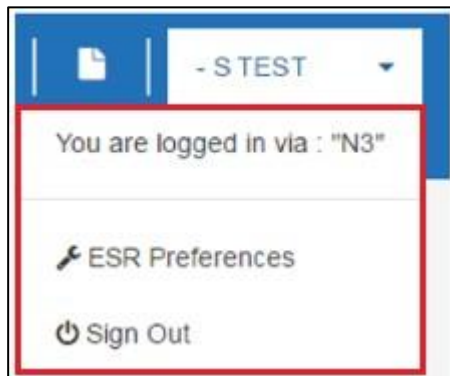
Portal Navigation

Header



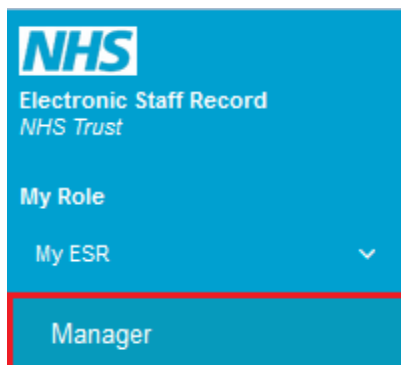
The header bar contains a portal search bar which allows you to search for portal content, currently only information contained within the Announcements portlet, and a Notifications  icon which will display a count of open ESR notifications, if applicable.

All users can click on their name to sign out or access the ESR Preferences page within ESR. You will also see an indicator as to whether you are logged in via N3 or the Internet:



Navigation Bar

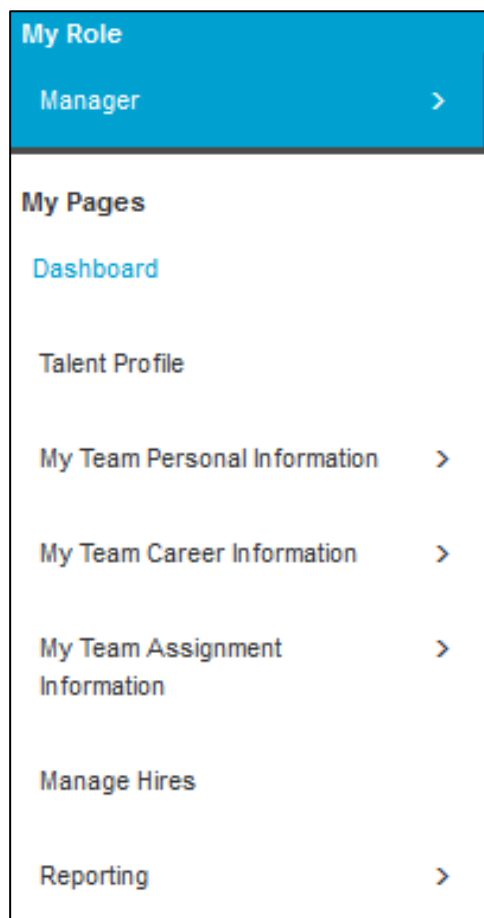
The options available in the menu are based on the access you have to ESR.



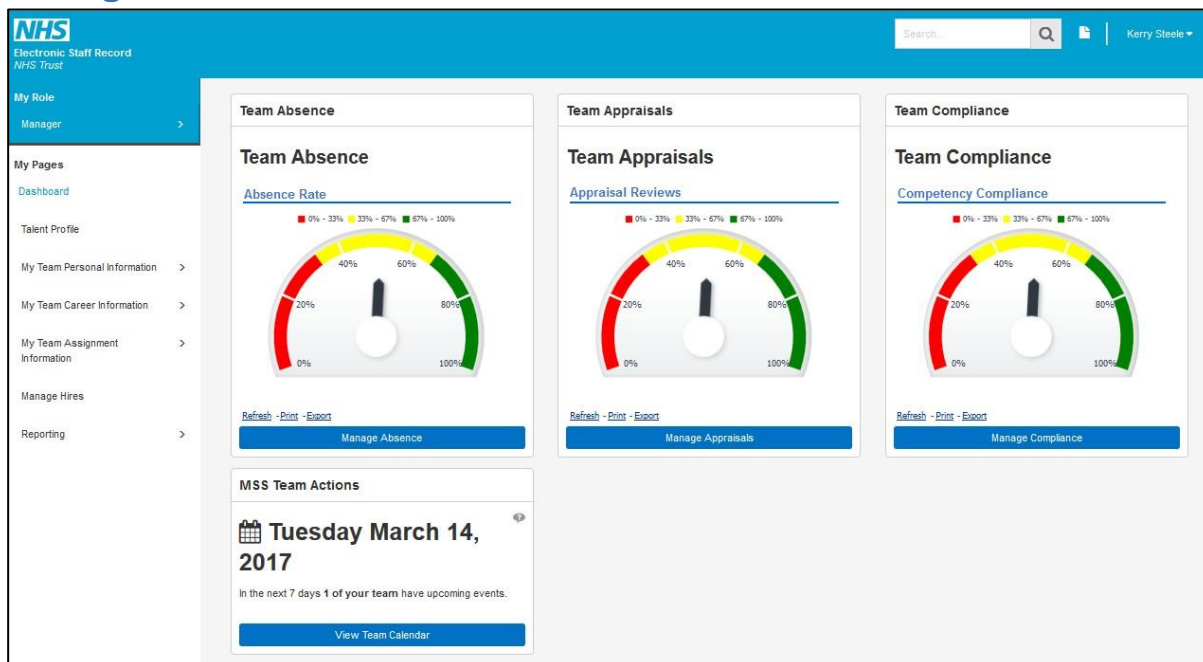
The My ESR dashboard is the default dashboard for all users. As a user of the Manager, Supervisor or Administrator Self Service responsibilities you will also have access to the Manager Dashboard.

Accessing ESR Forms

The side menu structure provides direct navigation to ESR functions.



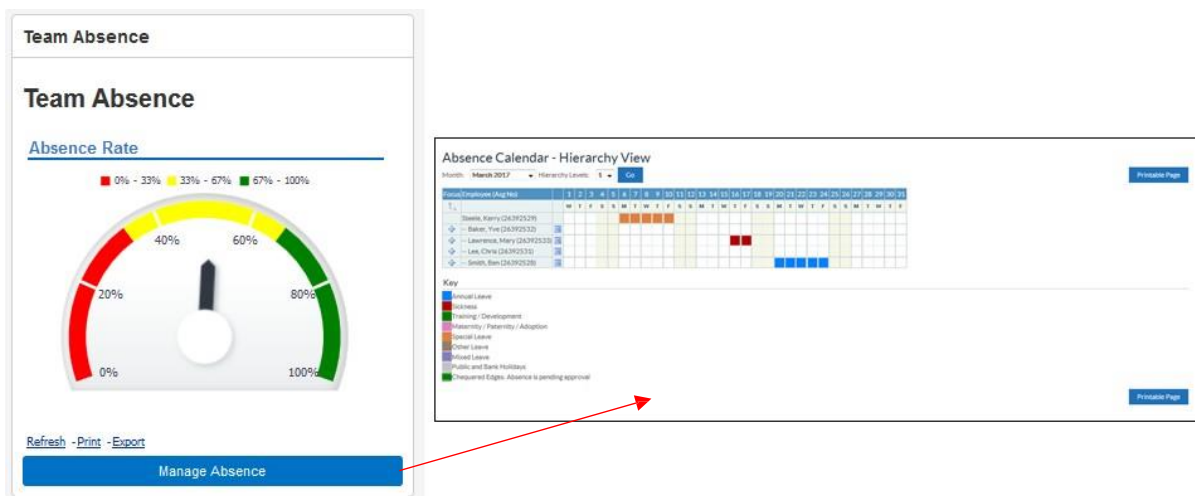
Manager Dashboard



Portlets

The following portlets are displayed on the Manager Dashboard:

Team Absence

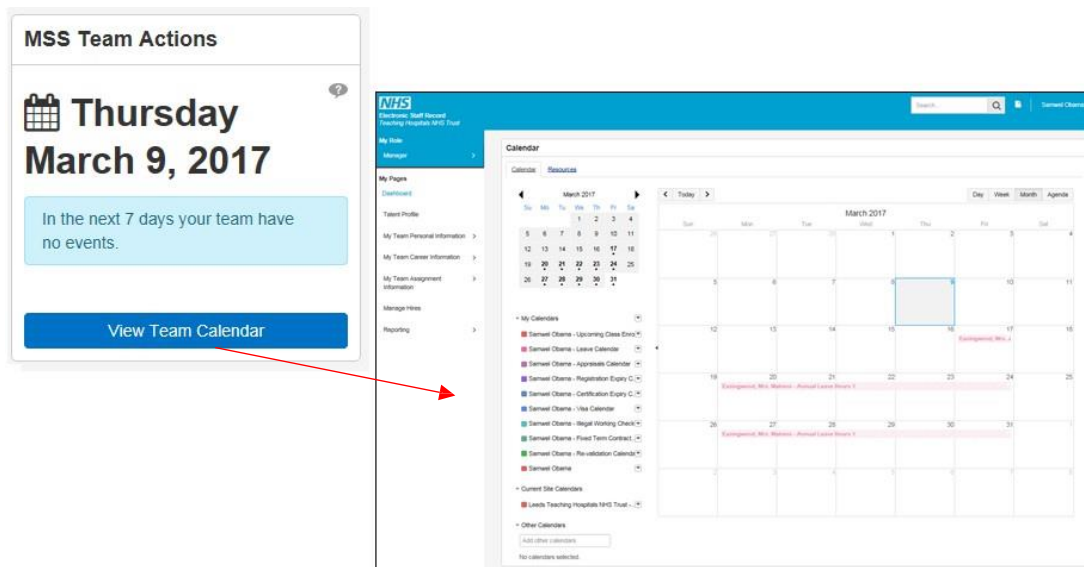


This portlet will display a gauge showing the percentage absence rate for your team.

Clicking the gauge will launch the appropriate BI report to enable you to analyse the figures in more detail.

Clicking on the 'Manage Absence' button at the bottom of the portlet will launch the Absence Calendar-Hierarchy View page where you can view and book absences for your team.

MSS Team Actions



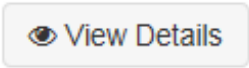
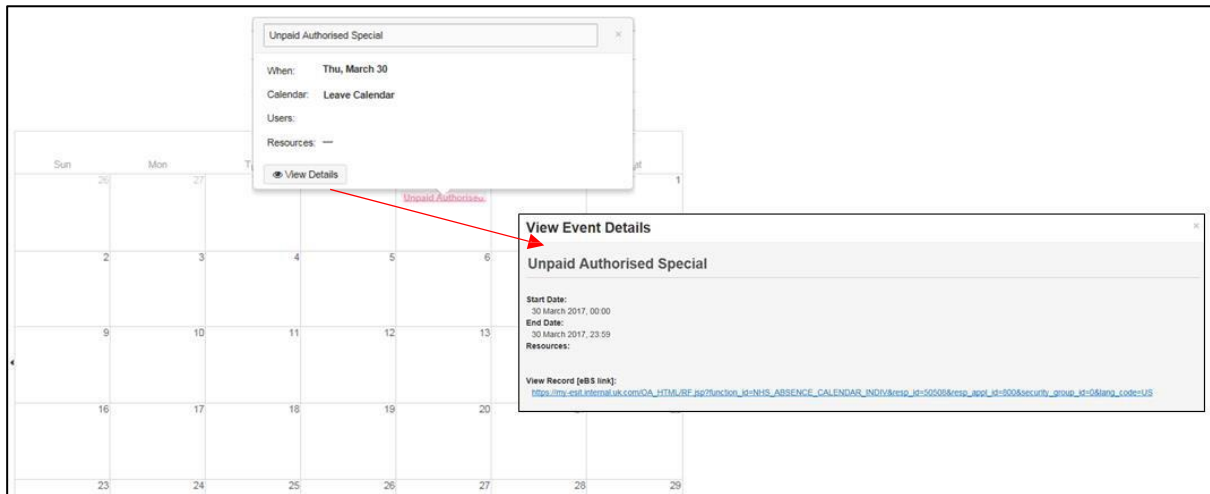
If any of your team have upcoming events within the next 7 days a prompt is displayed in the portlet stating the total number of events across your team.

The events included are as follows:

- Class Enrolments
- Absence
 - Annual Leave
 - Sickness Leave
 - Special Increasing Balance Leave
 - Special Decreasing Balance Leave
 - Study Increasing Balance Leave
 - Study Decreasing Balance Leave
 - Training Development Leave
 - Unpaid Leave
- Appraisal Due Date
- Registration Expiry Date
- Learning Certification Expiry Date
- Visa Expiry Date
- Valid Illegal Working Checklist
- Fixed Term Contract End Date

You can view further detail by clicking the View Team Calendar button.

Clicking on an event will give you a summary of the event details:



Clicking the **View Details** button will provide further details of the event including, where possible, a link to the page in ESR where the information can be viewed: