

ESR Portal Familiarisation

User Guide



April 2017



It's your ESR

ESR Portal Familiarisation - User Guide

This guide is intended to provide you with an overview of the My ESR Dashboard. The My ESR dashboard is available to all users and is the default dashboard displayed when accessing the ESR Portal.

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ET-2040 v2.0

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 or via the Internet.

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

Internet Login Page:

The Internet login page provides a login with Remote Access credentials

Please note the following if accessing the ESR Portal via the Internet:

- Only Employee Self Service (and Limited Access), External Learner and e-Learning User Responsibility Profiles are currently available via the internet
- Only the My ESR Dashboard will be displayed
- A Notification count will be displayed in the Notifications area but you cannot navigate to the notifications page in ESR.
- The Announcements Portlet will not display broadcast messages targeted at Managers or ESR Core users.
- The Portal Search function will not return Portal Content targeted at Managers or ESR Core users
- The My Favourites portlet will only display those favourites that can be accessed from the internet.
- Administration roles will not be accessible via Internet.

My ESR Dashboard

The My ESR dashboard is the default view for all users when accessing the portal. It contains a number of key features such as links to Notifications, Settings and Portlets.


The screenshot displays the My ESR Dashboard interface. At the top, there is a blue header with the NHS logo, 'Electronic Staff Record', and 'NHS Arden & Greater East Midlands Commissioning Support Unit'. A search bar and user profile information are also visible. The dashboard is organized into several sections:

- My Role:** My ESR
- My Pages:** Dashboard, Portal Content, ESR Navigator, My Personal Information, My Pay & Rewards, My Learning, My Compliance & Competency, My Absence, My Appraisals and Reviews, My Employment, My Property Register, My Talent Profile, Manage Internet Access.
- Announcements:** A banner for the new MyESR App, stating it is now available free from the App Store. It includes quick links to MyESS, ESR News, and Live service status, along with a link to download the app.
- My Annual Leave:** Shows an assignment number, accrual plan (Annual Leave Hours 1 NHS), entitlement (210 Hours), taken (150 Hours), booked (0 Hours), and remaining (60 Hours). Buttons for 'Create Annual Leave' and 'View Absence Calendar' are present.
- My ESR Calendar:** Displays the date 'Wednesday September 13, 2017' and an information message: 'You have no classes in the next 7 days.' A 'View My Calendar' button is at the bottom.
- Twitter:** A tweet from Arden and GEM CSU (@ardengem) thanking visitors to @ExpoNHS and providing a link for commissioning needs support.
- My Payslip:** A section for viewing or downloading the latest payslip(s) or accessing ESR for full payroll history. It shows an assignment number and position title, and a 'View Payslips' button.
- My Total Reward Statements:** Shows the tax year (2016-2017) and a 'Launch my TRS' button.
- My Favourites:** Lists 'Enter & Maintain (People)' and 'Assignment HR' with a 'Manage Favourites' button.
- My Personal Information:** A section for user details, currently empty.

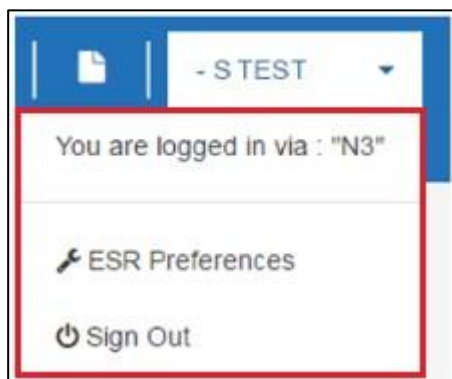
Portal Navigation

Header



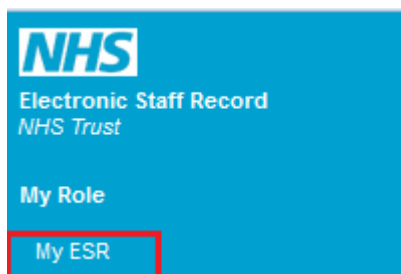
The header bar contains a portal search bar which allows you to search for portal content, currently only information contained within the Announcements portlet, and a Notifications  icon which will display a count of open ESR notifications, if applicable.

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

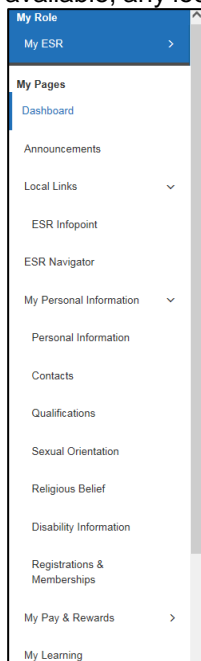
The options available in the menu are based on the access you have to ESR.



The My ESR dashboard is the default dashboard for all users. Users with access to additional responsibilities will have more dashboards available to them, e.g. Managers.

Accessing ESR Forms

The side menu structure includes the ability to access all Announcements that have been made available, any local links that have been added and direct navigation to ESR functions.



Portlets

Access to Portlets

Portlets provide easy access to your information and direct links to the relevant Self Service forms where applicable.

All users will have access to the Announcements portlet.

In addition to Announcements, further portlets are available on the My ESR Dashboard based on the access you have to ESR, as follows:*

, Employee Self Service / Employee Self Service (Limited Access)

- My Payslip
- My Annual Leave
- My Enrolments and e-Learning
- My Total Rewards Statement
- My Personal Information
- My Favourites
- My ESR Calendar

*Whilst these portlets are available, an Organisation can define locally the portlets that you have access to.

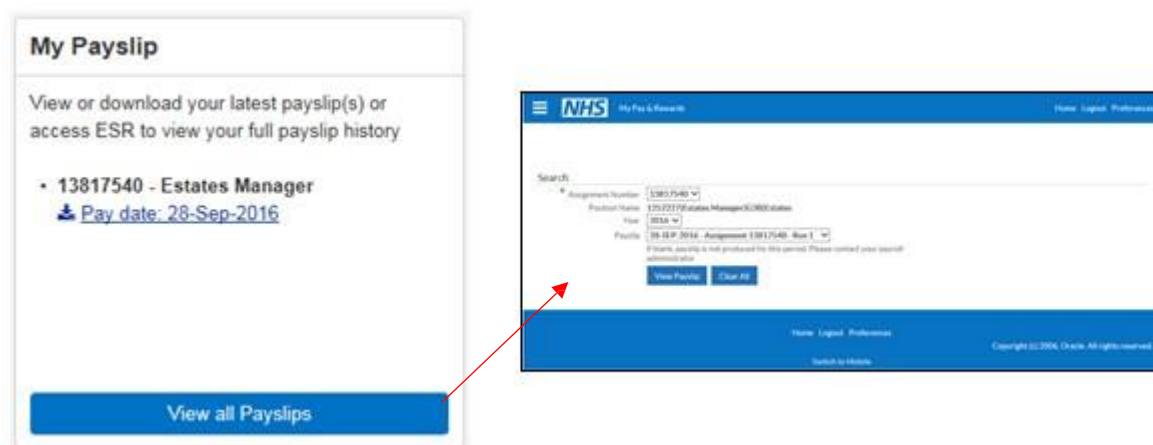
Announcements

The Announcements portlet can contain both local and national messages.



The latest 20 messages will rotate automatically. A 'View all' link is available to access a detailed list of all messages. If you click on a particular announcement you will be taken to the appropriate external page relating to that announcement.

My Payslip



Your most recent payslip will be displayed at the top of this portlet. Payslips will be displayed for up to 4 assignments (according to the most recent pay date). You can download payslips from this portlet which, once downloaded, will be available in a PDF format. For more information, you can click on the 'View all Payslips' link which will take you directly to the ESR Online Payslip page where your full payslip history is available.

My Annual Leave

The image shows three components of the NHS My Annual Leave system:

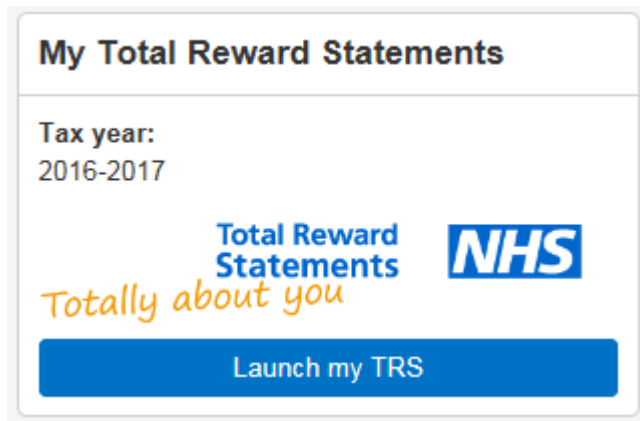
- My Annual Leave Summary Card:**
 - Assignment: 13817540
 - Accrual Plan: Annual Leave Hours 1 NHS
 - Entitlement: 175.5 Hours
 - Taken: 90 Hours
 - Booked: 0 Hours
 - Remaining: 85.5 Hours
 - Buttons: Create Annual Leave, View Absence Calendar
- Create Absence: Enter Absence Details Form:**
 - Employee Name: Zonga, Mr. Seethill
 - Employee Number: 13817540
 - Fields for Absence Type, Reason, Start/End Date, and Duration.
 - Calendar view for December 2015.
 - Buttons: Cancel, Next, Calculate Duration.
- Absence Calendar:**
 - Employee Name: Seethill, Mrs
 - Employee Number: 200002250
 - Calendar view showing leave taken (green) and booked (blue) across months from Dec 2015 to Mar 2017.

This portlet presents you with key information about your annual leave entitlements e.g. hours taken vs. hours remaining. Details for your primary assignment will be displayed by default and a dropdown list is available to select any other active assignments you have. The Create Annual Leave and View Absence Calendar buttons will take you directly to the Self Service forms.

Explanation of terms used in the Annual Leave portlet:

- **Entitlement:** Depending on the accrual plan allocated, balances will either display your full year's entitlement or your accrued leave to date in hours or days. The Entitlement figure shown will include 'Bank Holidays' or 'Statutory Days' where these options have been selected for the plan together with any leave carried forwards or purchased where this has been agreed.
- **Taken:** This figure displays your annual leave which has been approved at today's date.
- **Booked:** This figure displays your annual leave which has been booked in the future, i.e. from today's date to the end of your annual leave year.
- **Remaining:** This is a calculation of your Entitlement less annual leave taken and booked.

My Total Reward Statement



My Total Reward Statements

Tax year:
2016-2017

Total Reward
Statements

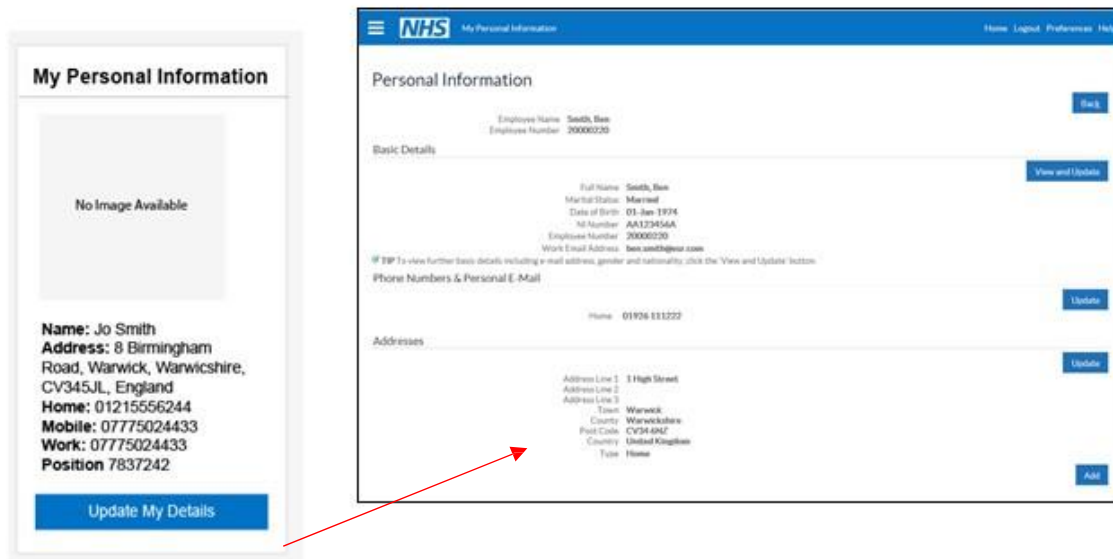
Totally about you

NHS

Launch my TRS

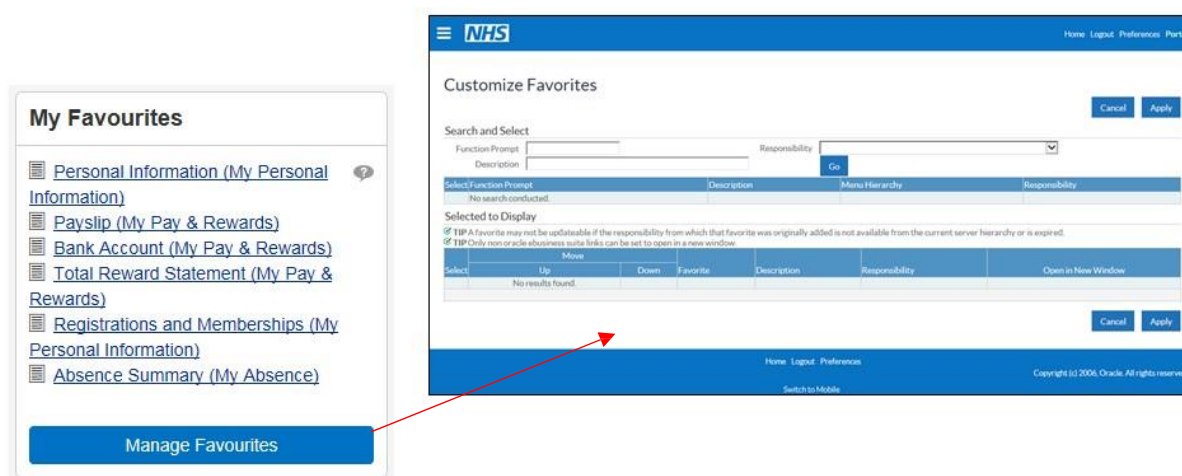
If you click on 'Launch my TRS' it will open a new window showing your Total Reward Statement.

My Personal Information



This portlet contains your picture (where available) and a summary of your personal information. Clicking on the 'Update My Details' button will take you to the Personal Information page in ESR where all information and updates can be made.

My Favourites



The My Favourites portlet can display up to 10 favourites. You can add or remove favourites by clicking the Manage Favourites button which will launch the Customize Favourites page in ESR.

My ESR Calendar

The My ESR Calendar will display the events you have upcoming in the next 7 days.

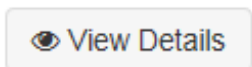
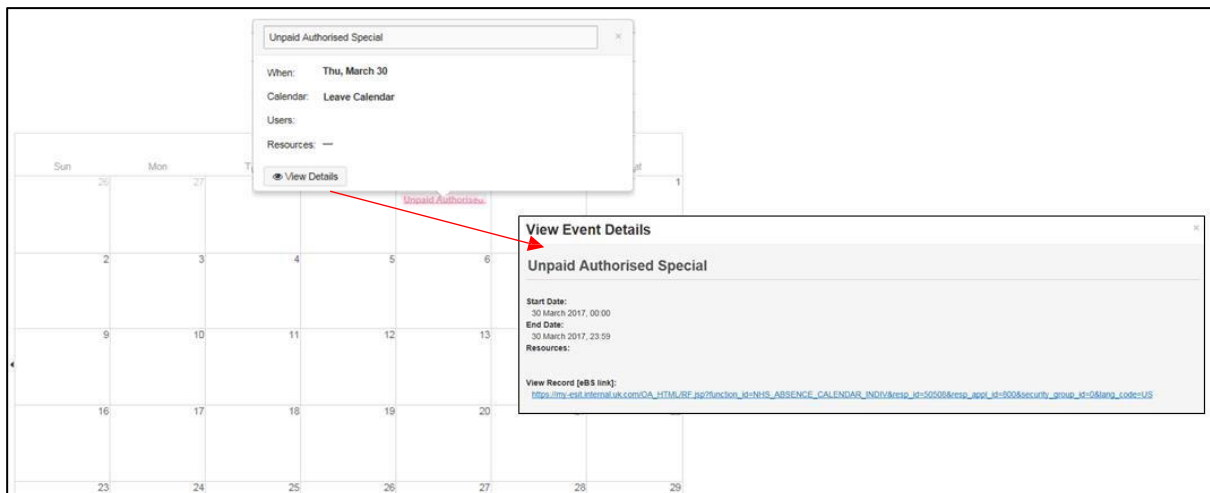
If you have any classroom based learning booked within the next 7 days the portlet will display a prompt.

The events included are as follows:

- Class Enrolments
- Absence
- Appraisal Due Date
- Registration Expiry Date
- Learning Certification Expiry Date
- Visa Expiry Date
- Valid Illegal Working Checklist
- Fixed Term Contract End Date
- Revalidation Date

You can view further detail by clicking the View My 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: