A Manager's guide to MyESR - Supervisor Self Service

CONTENTS   **PAGE**

Introduction

As a Manager you have been given access to manage your team in MyESR. The level of access granted is called Supervisor Self Service – this is ESR terminology defining what activities you are able to undertake / view. *(Anyone with employees reporting to them is known in ESR as a Manager but will be allocated Supervisor Self Service access.)*

A Quick overview of the Manager Dashboard

For a quick overview the Manager Dashboard click the following link
https://nhsbt.pagetiger.com/November-2018-v1/January-2019-v1.

Logging in

If you have not previously logged into MyESR refer to the guidance and videos on People First.

When you have logged in you will see your own Personal Dashboard with information about you.

If viewing information about your team for the first time, you will need to set up your Internet access. *(To do this you need to be connected to an NHSBT network connection or corporate Wi-Fi).* Click the option Manage Internet Access.

You will be prompted to enter your mobile number (remember to remove the 0 at the beginning) and then select the option to Confirm Mobile Number.

NHS Electronic Staff Record
NHS Electronic Staff Record

Manage Internet Access

Your request for Internet Access:

ESR Username: **918ITEST02**

Status: **Approved**

To enable upgraded access to ESR on the internet your request for internet access must be approved and your mobile number must be set.

Your mobile number: **To be set**

Enter your mobile number and a code will be sent to you:

+44 [|]   [Confirm Mobile Number]

[Go Back]

You will then receive a text on your mobile asking you to enter the code that you have been sent. Enter the Code and Click the option to Confirm Code.

NHS Electronic Staff Record
NHS Electronic Staff Record

Confirm your number

We have sent a code to your mobile number ending: xxxxxxx173

Enter the code you received:

3909 [|]   [Confirm Code]

Code Not Received?

If you need the code to be resent please go back and retry or update your number before retrying.

Tip: If you want to update your previously saved number please navigate to 'Manage Internet Access' in the ESR Portal header or from the ESR Navigator.

[Go Back]

You will see a notification to confirm that your mobile phone has been set. Select Continue to MyESR Dashboard.

Success

Your mobile number has been set.

When you next login to the ESR Portal using the internet you will see an "Upgrade Access" option which will allow you to access further ESR functions.

Tip: If you want to update your previously saved number please navigate to 'Manage Internet Access' in the ESR portal header or from the ESR Navigator

Continue to My ESR Dashboard

You will now be able to access your Manager Dashboard by selecting MyESR and then Manager. (You will be able to access this in future from non NHSBT connections but will be required to enter a code each time which will be sent to the mobile you have set up.)

Your Manager Dashboard will appear (this may take a little while to load as it is extracting data to update the statistics shown on the dashboard).
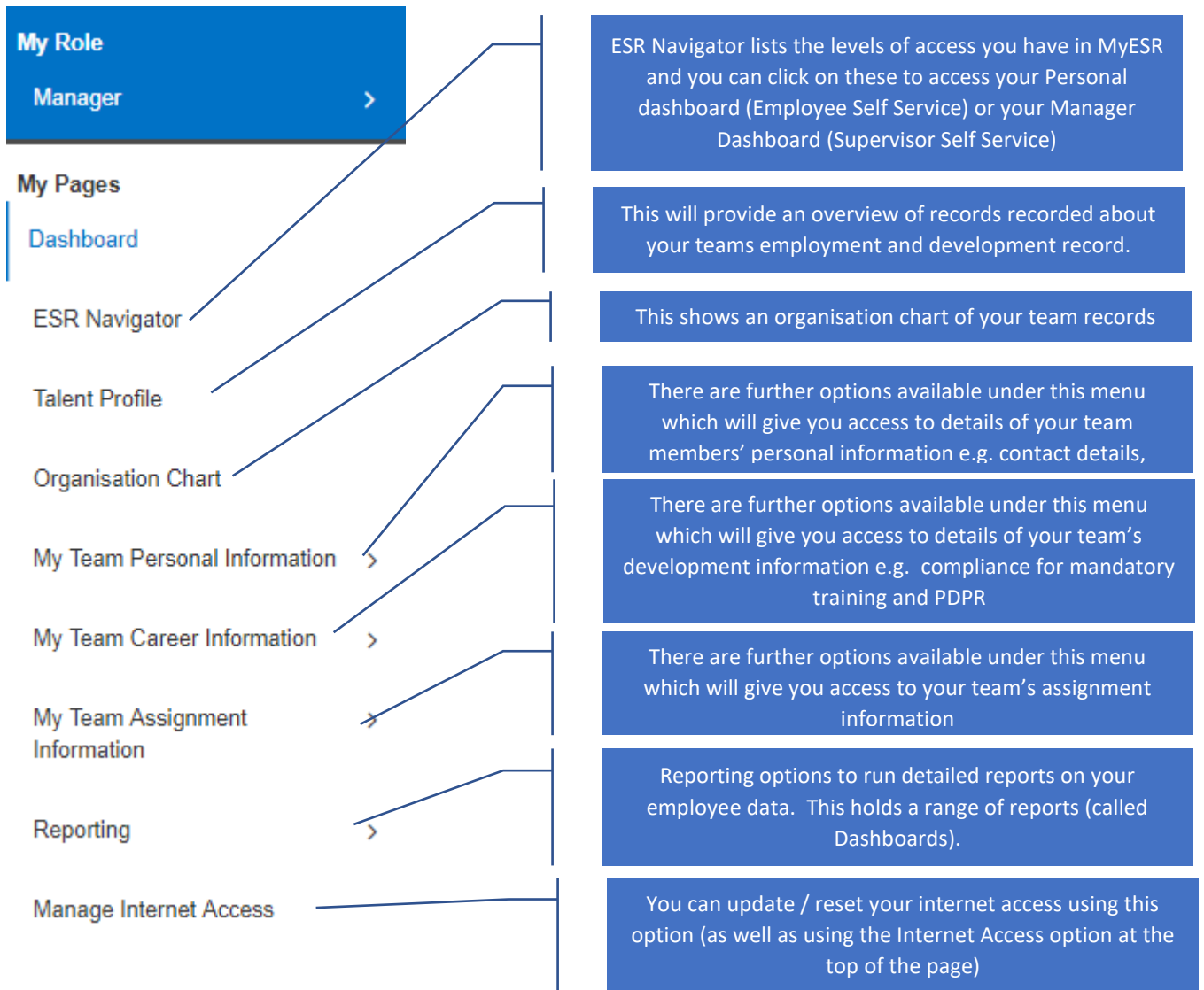
Navigating the Manager Dashboard

You can click on the options within the boxes on your dashboard (these boxes are known as portlets), which give you access to information such as Team Absence, Team Compliance etc.

Clicking on the Grey option within the portlet will launch the reporting application (Business Intelligence reporting), where you will be able to report on detailed information. (This application opens in a separate window / tab). Note – this report is based on data which is usually 24 hours behind the live ESR system.

Clicking on the Blue option – Manage Absence will provide a quick overview of your team's absence.
Note – data using this option is up to date.

You can view a wider range of information using the menu option to the left of your Manager dashboard.

My Role

Manager >

ESR Navigator lists the levels of access you have in MyESR and you can click on these to access your Personal dashboard (Employee Self Service) or your Manager Dashboard (Supervisor Self Service)

My Pages

Dashboard

This will provide an overview of records recorded about your teams employment and development record.

ESR Navigator

This shows an organisation chart of your team records

Talent Profile

There are further options available under this menu which will give you access to details of your team members' personal information e.g. contact details,

Organisation Chart

My Team Personal Information >

There are further options available under this menu which will give you access to details of your team's development information e.g. compliance for mandatory training and PDPR

My Team Career Information >

My Team Assignment Information >

There are further options available under this menu which will give you access to your team's assignment information

Reporting >

Reporting options to run detailed reports on your employee data. This holds a range of reports (called Dashboards).

Manage Internet Access

You can update / reset your internet access using this option (as well as using the Internet Access option at the top of the page)

Each time you have selected an option you can return to your Manager Dashboard page by clicking the option for Portal on the top right hand side of the screen.

Home | Navigator ⌄ | Favorites ⌄ | Settings ⌄ | Logged In As 918ITEST02 | Help | Logout | Portal

Getting Started with MyESR - Manager's Supervisor Self Service Access

Manager's Supervisor Self Service access in MyESR will enable you to undertake a number of activities to manage your team's records and eventually to monitor mandatory training and PDPR compliance.

Your department structure will define which employee records you can view.

Under General Data Protection Regulation (GDPR) you should only be able to view the employees you manage or any of their direct reports. Remember that the personal information that you can view in MyESR should not be shared with others and should be treated securely and in line with NHSBT Information Governance Policies and guidance.

Accessing and Viewing the Manager Dashboard

From the Manager menu you will be able to view the following details:

1. Team Absence
2. Team Compliance (Mandatory Training / PDPR – future development)
3. Organisation Chart
4. Team Actions

Reporting Hierarchy in MyESR

The information that you will see depends on how your department structure has been set up in MyESR – this is the Reporting Hierarchy.

As a Manager you will be able to view information for your direct reports and for anyone further down the ESR hierarchy.

In ESR Level 1 of the reporting hierarchy is your direct reports. Level 2 is the next level down and so on.
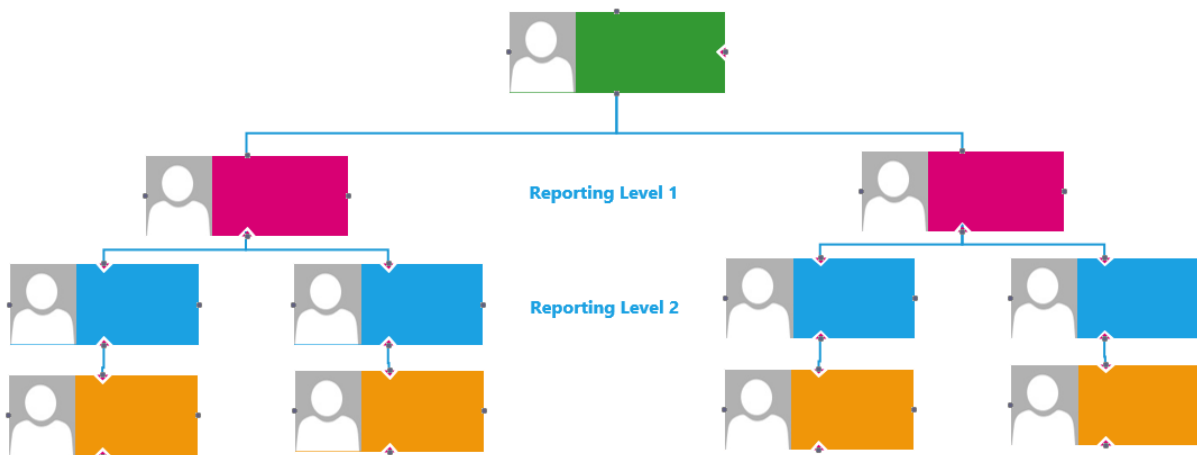
In this example there are 2 management levels reporting into you, at level 1 your direct reports and at Level 2 their reports. Where you have multiple levels of reporting within your department you can select which employees to view, based on the ESR reporting hierarchy level.

The example below shows how you can change the view of which employees you wish to see in the absence calendar by selecting either Level 1 or 2 (once you have selected the level click **Go** to apply this change).

Team Absence Portlet
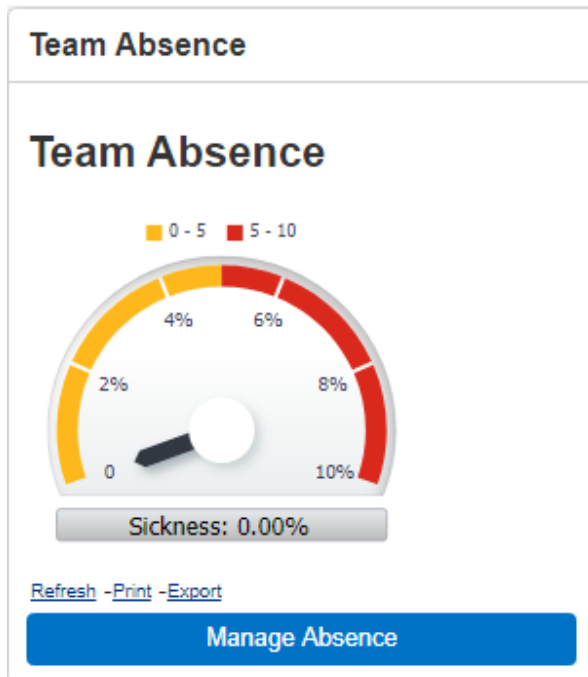
Whilst all absence will continue to be reported in our EASY system you will have access to an overview of your team's absence via the Team Absence portlet.

This provides an overview of the % absence you have within your team.

The compliance levels are based on National NHS requirements.

Team Compliance Portlet
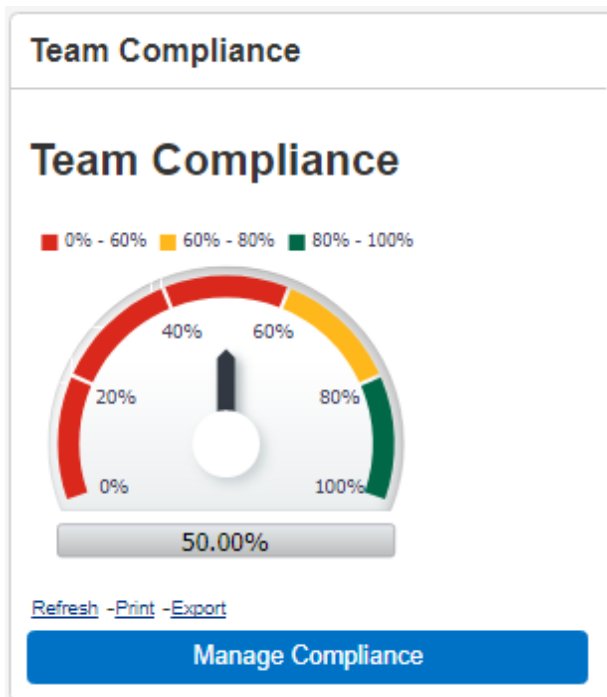
In future we will be using MyESR to complete / record / monitor our mandatory training and PDPR compliance.

This is an NHS portlet but we are working towards two separate portlets specific to NHSBT which will be Mandatory Training Compliance and PDPR compliance.

Organisation Chart

Organisation Chart
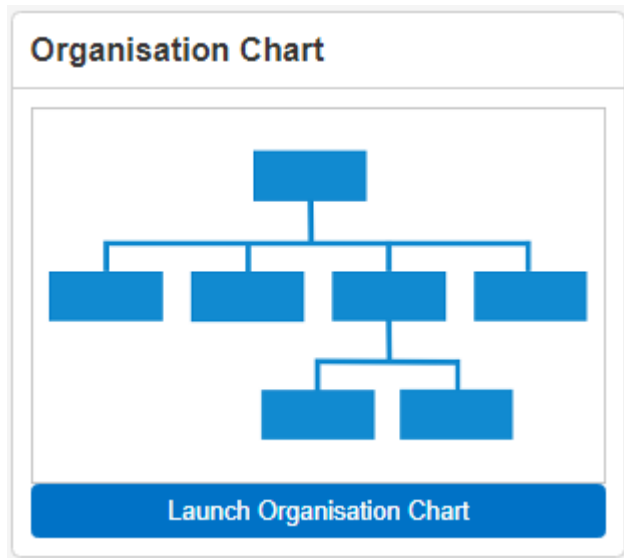
ESR Organisation chart is simply a diagrammatic view of the management reporting line held ESR. This will not necessarily be the same as the NHSBT's cost-centre or departmental organisation structure.

You will be able to view and report on data for any employee visible in this organisation chart.

You can collapse / expand levels of the organisation chart depending upon your reporting access levels.

Team Actions

Team Actions

This shows a range of actions / events which can be viewed by day / week / month such as:

• Upcoming compliance requirements for individual employees you are a manager for.
• Fixed Term Contract end dates.

Note: some information won't be visible e.g. annual leave transfers from EASY to ESR once it has been taken so ESR will not reflect annual leave booked.

Personal Information and Contacts

To view your team's personal information log into your Manager dashboard on MyESR.

Select My Team Personal Information and then Personal Information to see a list of all team members reporting directly to you.
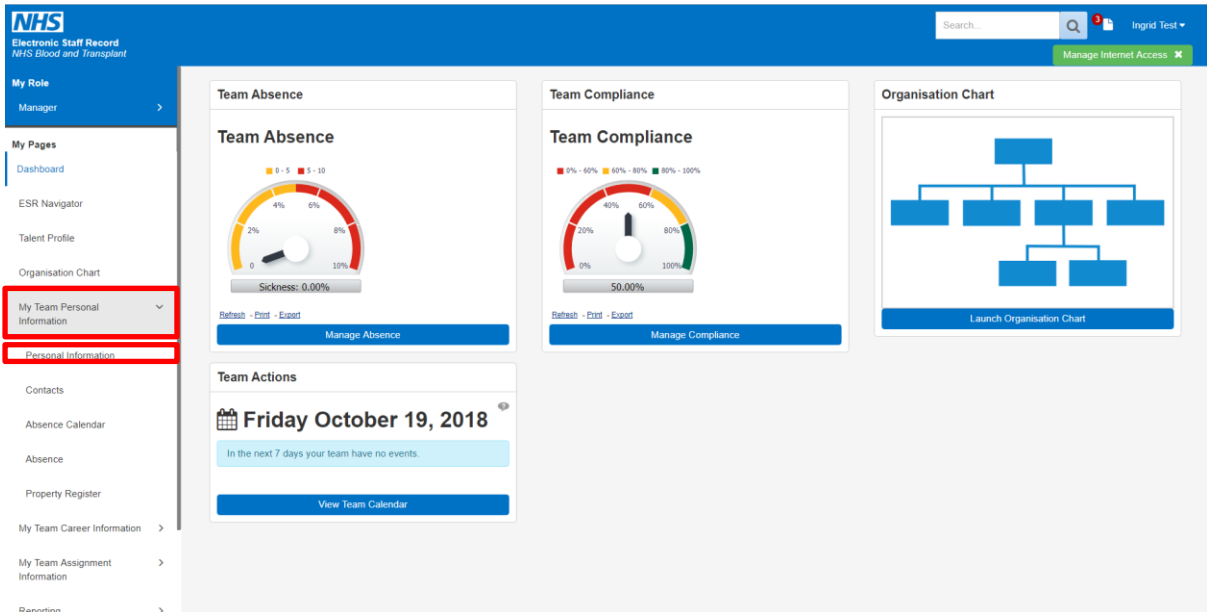
To view / updated personal records for individual members of your team click on the details option.

Once you have viewed / updated information click on the Portal icon to return to the dashboard.
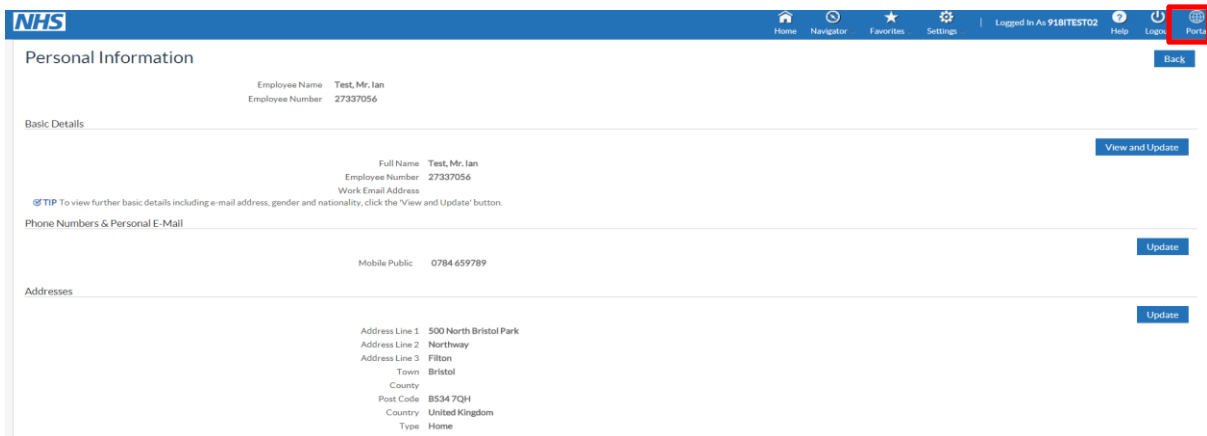
To view emergency contact details for your team, select Contacts.
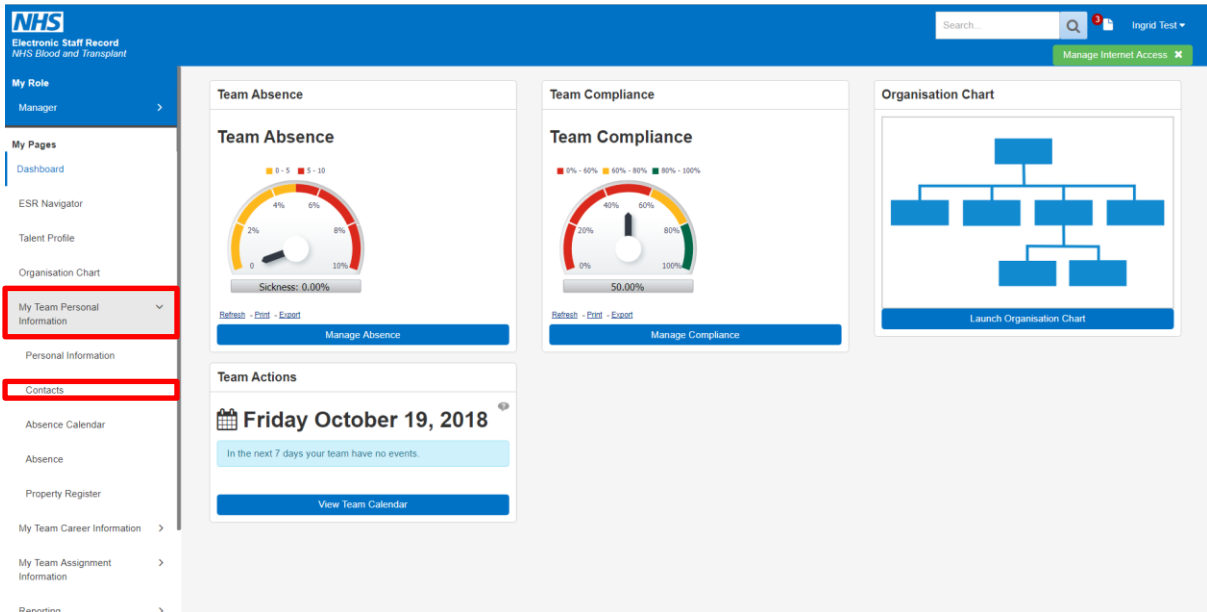
From the Contact page click on Actions.
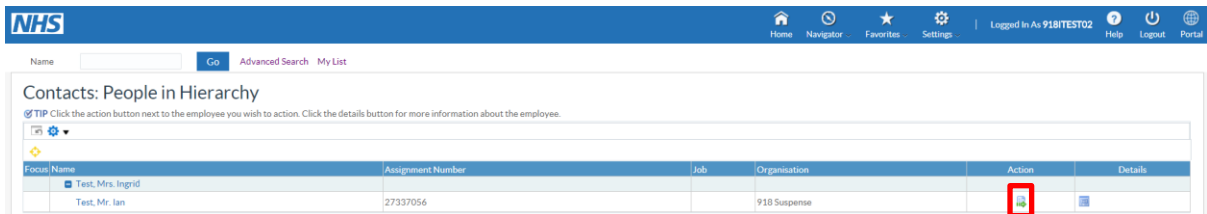
Once you have viewed / updated contact information click on the Portal icon to return to the dashboard.
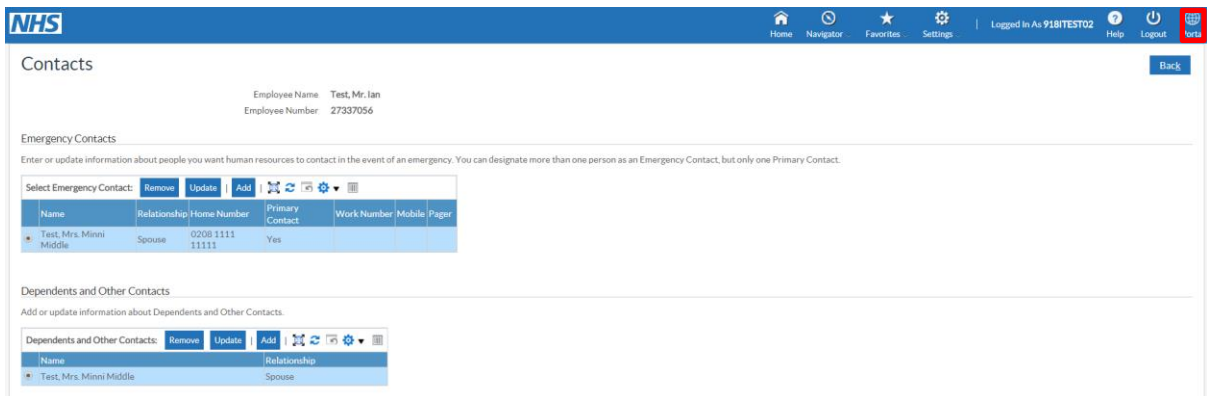

To exit the contact information, click on the portal icon.

Reporting

From the dashboard you will see Portlet(s) providing information about absence rates / compliance. [Portlets displayed in the picture are NHS Portlets however we

are presently working on bespoke reports for Mandatory Training and PDPR compliance to meet NHSBT reporting criteria so when you log on you may see different Portlets].

Portlets provide a snapshot of current compliance / absence rates and by clicking on options within the portlet you can view further detail.
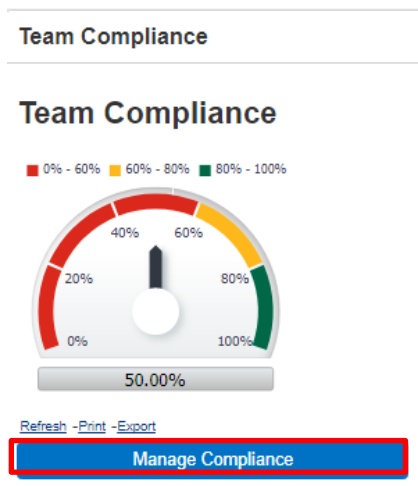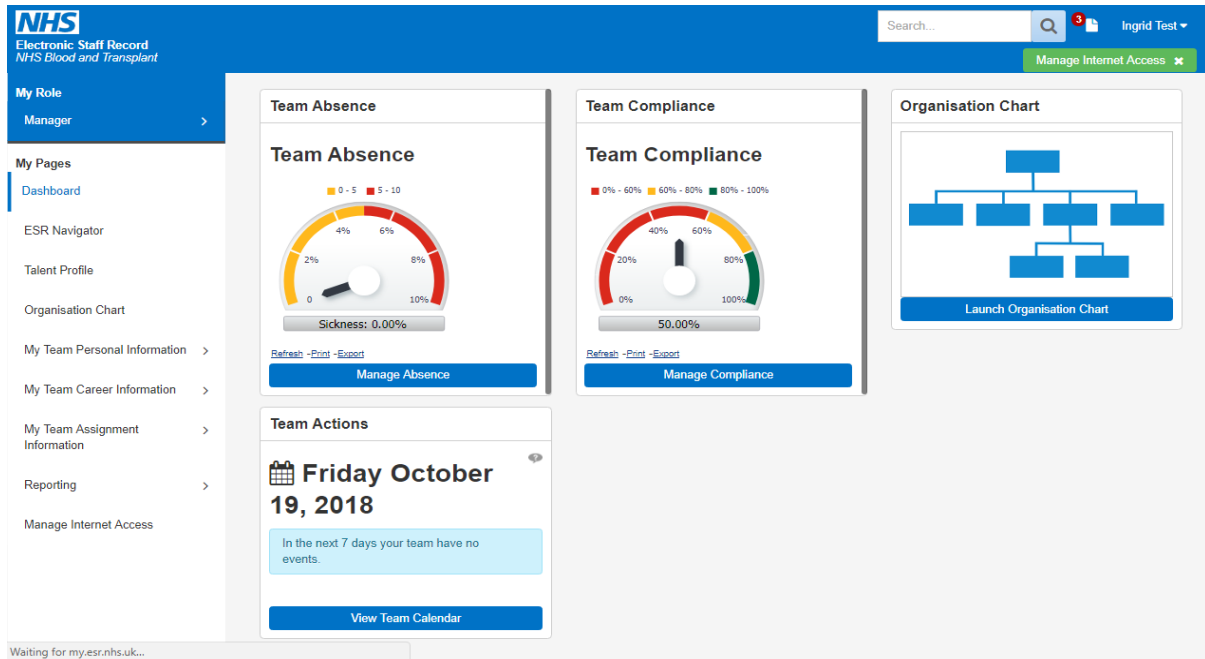
For a quick overview of your team compliance click on the Manage Compliance option from the Team Compliance Portlet which will take you to a list of your team showing their compliance status. This data reflects current compliance.

Depending upon the levels of reporting within your management structure you may have access to a number of Reporting Levels. To select the level of data you wish to review click on the Hierarchy Levels and the number for which level you wish to view then click **GO**.

Compliance and Competency - Hierarchy View

Competence: All ▼   Hierarchy Levels: 1 ▼   **Go**
1
2

Focus	Employee (Asg No)	Compliance Percentage
↑	Test, Ingrid (27397951)	
⊕	-- Test, Ian (27337056)	33.3%

To view details of individual compliance, click on the table.

Compliance and Competency - Hierarchy View

Competence: All ▼   Hierarchy Levels: 1 ▼   **Go**

Focus	Employee (Asg No)	Compliance Percentage
↑	Test, Ingrid (27397951)	
⊕	-- Test, Ian (27337056)	33.3%

This provides details of the status of compliance achieved e.g. Green = Compliant, Red = Non-Compliant. (A key is available to explain the colour coding).

Team Compliance

Team Compliance

■ 0% - 60% ■ 60% - 80% ■ 80% - 100%

50.00%

Refresh - Print - Export

Manage Compliance

For a more detailed view of your team's compliance click on the Grey button showing the % compliance.

This will launch an application called Business Intelligence (BI) Reporting. This application will open is a separate window.
Note: data reported from BI is usually 24 hours behind so if a member of your team has recently completed training it may not be reflected in the report.

Once you're are signed into BI you will see the data relating to the compliance shown on the dashboard.

Example Business Intelligence Report – NHS Compliance Trending Dashboard

The NHS Compliance Trending Dashboard provides a range of data on compliance.

The example below shows information using Filters which you can change and apply to obtain different views of information e.g. you may want to see compliance by the list of mandatory training for your department, or at a higher level, by Department.

Dashboard Help – will give an overview of what information the dashboard is reporting

Filters – use the filters to define the information you wish to report on

If you hover your mouse pointer over the data in the table, you will see that some data has links to other data e.g. clicking on Organisation – NHS Blood and Transplant directs you to a new dashboard called NHS Compliance Dashboard.

You can continue to drill down into the records or by selecting other tabs along the top of the report.

To return to the original dashboard at the bottom of the page select the option for NHS Compliance Trending Dashboard.

If you regularly run a specific report you can save the filters that you use in that report as follows:

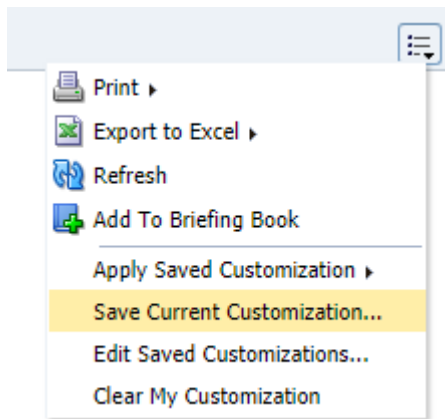Make the changes e.g. change the amber status from 60 to 49 and the Green Status from 90 to 95 and the click Apply.

In the top right hand corner select the icon and then select Current Customization.

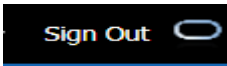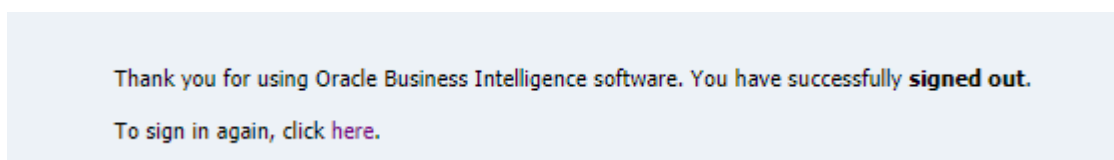Give the customization a Name (you can also set the option to use this customization by default for each time you run this report if required by ticking the box). Then click OK.
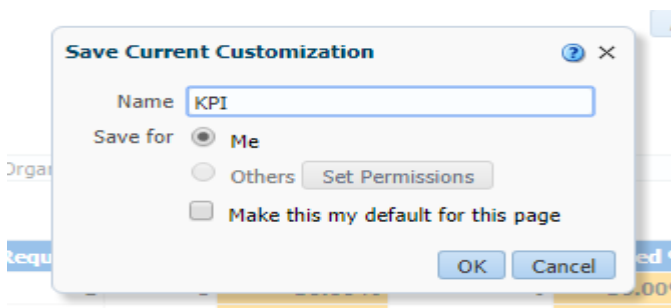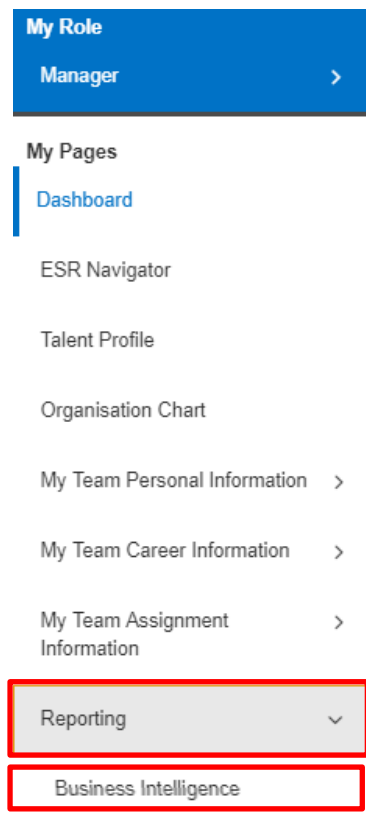

When you are running a report there is a symbol in the top right hand corner. This symbol will spin to show that the BI report is running. If the symbol is not spinning, then this could be an indication that your BI session has timed out and you would need to log back in through your Manager account to restart.

To sign out of BI select the option to Sign Out.

You will see a message confirming that you have signed out of BI. There is an option to sign back in by clicking a link within the message box. This will not take you back to BI, you would need to sign back in through logging back into your MyESR account.

Thank you for using Oracle Business Intelligence software. You have successfully **signed out**.

To sign in again, click here.

## How to access other Business Intelligence Dashboards

There are a range of other standard reports available in BI (indicated as Dashboard Reports). To view and run these reports select the option on the left-hand side of the Manager Dashboard – Reporting and then Business Intelligence

When you select option Business Intelligence you will be signed into BI reporting
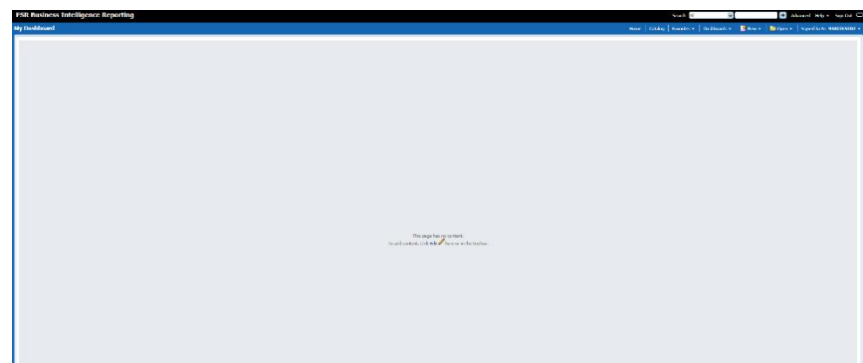
Select the option Dashboard you will see a range of local (those prefixed with 918 specific to NHSBT) those prefixed NHS are generic NHS Dashboards.
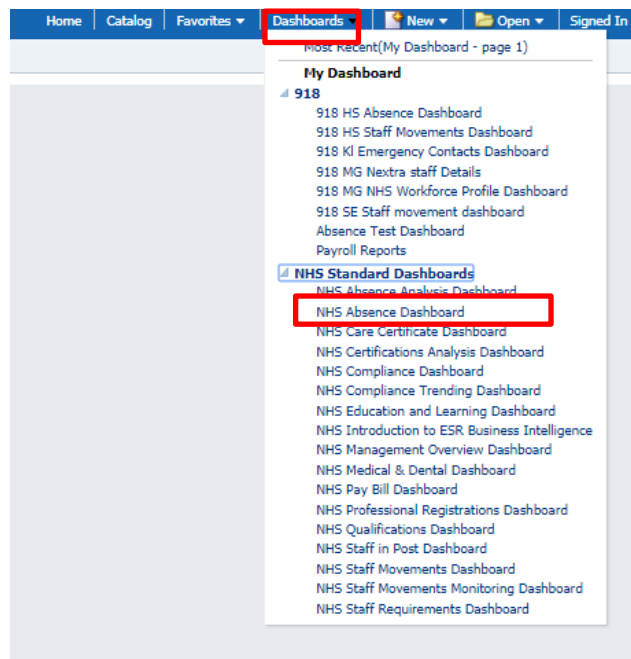
From here you can select and run a range of reports of your staff details.

As these are Generic NHS Dashboards some reports will not be relevant to employees in NHSBT.

Reports that have been specifically created for NHSBT reporting are prefixed with 918

Further information about Business Intelligence reporting can be found by accessing ESR's Knowledge Base.