



## A Manager's guide to MyESR - Supervisor Self Service

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## 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.

The screenshot displays the NHS Electronic Staff Record (ESR) Manager Dashboard. The top navigation bar includes the NHS logo, the text 'Electronic Staff Record NHS Blood and Transplant', a search bar, and the user name 'Ingrid Test'. A red box highlights the 'Manage Internet Access' button in the top right corner. The left sidebar contains a 'My Role' dropdown menu with 'Manager' selected, and a 'My Pages' list including 'Dashboard', 'Portal Content', 'ESR Navigator', 'My Personal Information', 'My Pay & Rewards', 'My Learning', 'My Compliance & Competency', 'My Absence', 'My Employment', 'My Property Register', and 'My Talent Profile'. The main content area features an 'Announcements' banner with the text 'Welcome to Your ESR' and the URL 'www.esr.nhs.uk'. Below the banner are three panels: 'My Personal Information' showing the name 'Ingrid Test' and an 'Update My Personal Information' button; 'My Favourites' showing a message about selecting favourites and an 'Update My Favourites' button; and 'My Total Reward Statements' showing the tax year '2017-2018' and a 'View My TRS' button. A 'Go Paperless' toggle switch is also visible, set to 'NO'.

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

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

### 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.*

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.)

The screenshot displays the NHS Electronic Staff Record (ESR) portal interface. On the left, the 'My Role' dropdown menu is open, showing 'My ESR' and 'Manager' options. The main dashboard area features a 'Welcome to Your ESR' banner with the NHS logo and website information. Below the banner, there are three main sections: 'My Personal Information' showing the user's name as 'Ingrid Test' with an 'Update My Personal Information' button; 'My Favourites' with a message indicating no favourites are selected and an 'Update My Favourites' button; and 'My Total Reward Statements' showing the tax year as '2017-2018' and a 'View My TRS' button. In the top right corner, a 'Manage Internet Access' button is highlighted with a red box.

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

The screenshot shows the NHS Electronic Staff Record Manager Dashboard. The top navigation bar includes the NHS logo, 'Electronic Staff Record NHS Blood and Transplant', a search bar, and the user name 'Ingrid Test'. The left-hand navigation menu lists various options under 'My Role' (Manager) and 'My Pages' (Dashboard, ESR Navigator, Talent Profile, Organisation Chart, My Team Personal Information, My Team Career Information, My Team Assignment Information, Reporting, Manage Internet Access). The main content area displays three portlets: 'Team Absence' (gauge showing 0.00% sickness), 'Team Compliance' (gauge showing 50.00% compliance), and 'Team Actions' (calendar for Friday, October 19, 2018, with a message that there are no events in the next 7 days). Each portlet has a 'Manage' button and a 'Launch' button.

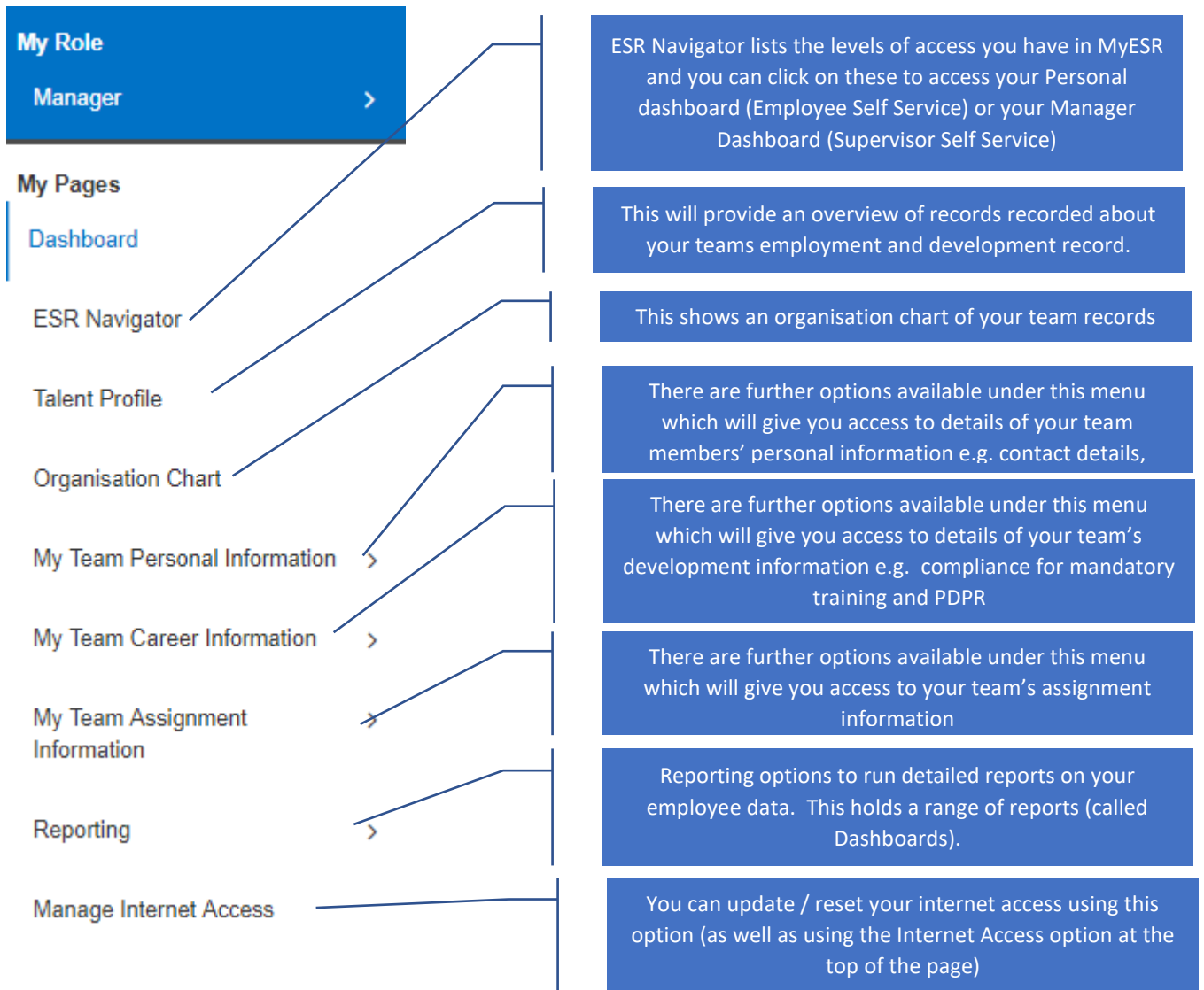
You can click on the options within the boxes on your dashboard (these boxes are known as portlets), which give you access to information such as Team Absence, Team Compliance etc.

The close-up of the Team Absence portlet shows a gauge chart with a needle pointing to 0.00% on a scale from 0 to 10%. The gauge is divided into color-coded segments: yellow (0-5%), red (5-10%), and green (10-100%). Below the gauge are links for 'Refresh', 'Print', and 'Export'. At the bottom is a blue button labeled 'Manage Absence'.

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.



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.



## 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

The screenshot displays the MyESR Manager Dashboard. The top navigation bar includes the NHS logo, 'Electronic Staff Record NHS Blood and Transplant', a search bar, and the user name 'Ingrid Test'. A 'Manage Internet Access' button is visible in the top right. The left sidebar contains a 'My Role' section with 'Manager' selected, and a 'My Pages' section with 'Dashboard' selected. The main content area is divided into four panels: 'Team Absence' with a gauge showing 0.00% sickness; 'Team Compliance' with a gauge showing 50.00% compliance; 'Organisation Chart' with a tree diagram and a 'Launch Organisation Chart' button; and 'Team Actions' showing a calendar for Thursday, November 8, 2018, with a message that there are no events in the next 7 days.

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

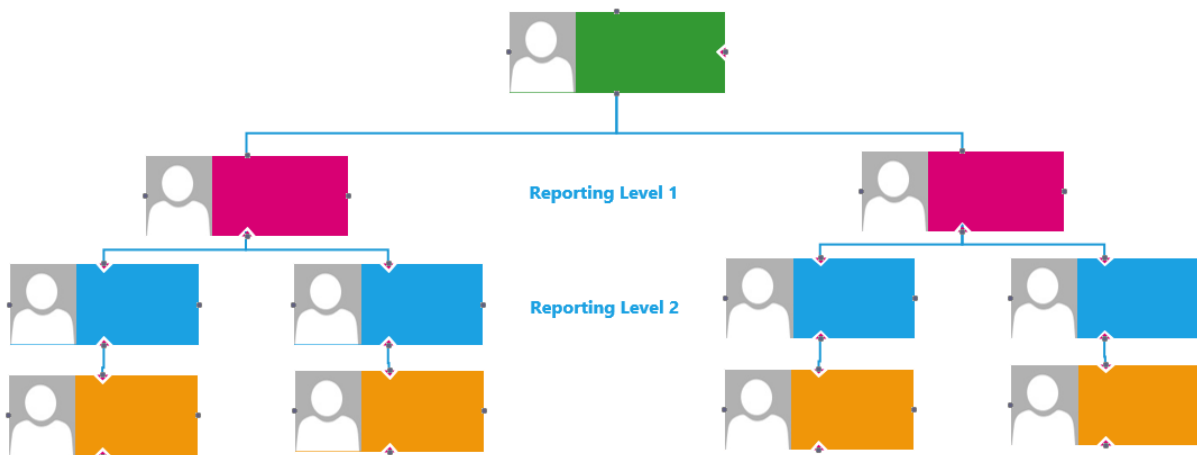
1. Team Absence
2. Team Compliance (Mandatory Training / PDPR – future development)
3. Organisation Chart
4. Team Actions

## 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).

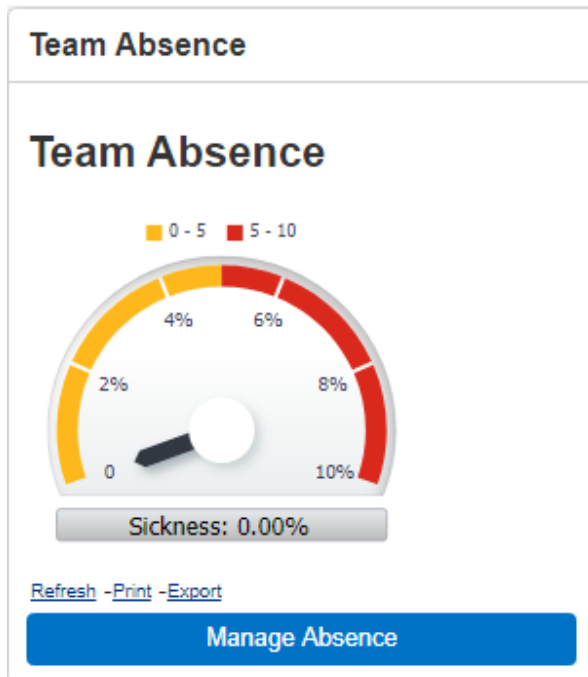
### Absence Calendar - Hierarchy View

Month:  Hierarchy Levels:

Focus Employee (Asg No)	1	2	3	4	5	6	7	8	9	10	11	12
	T	F	S	S	M	T	W	T	F	S	S	M
Text: Invalid (97997951)												



## Team Absence Portlet

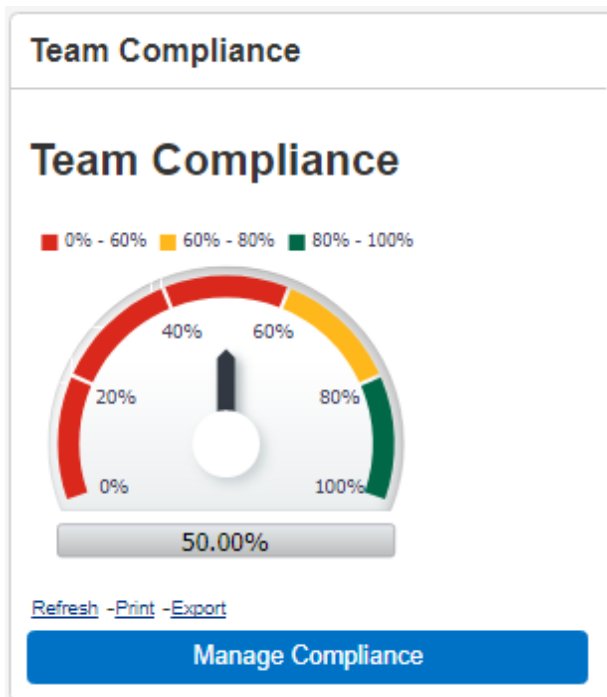


Whilst all absence will continue to be reported in our EASY system you will have access to an overview of your team's absence via the Team Absence portlet.

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

The compliance levels are based on National NHS requirements.

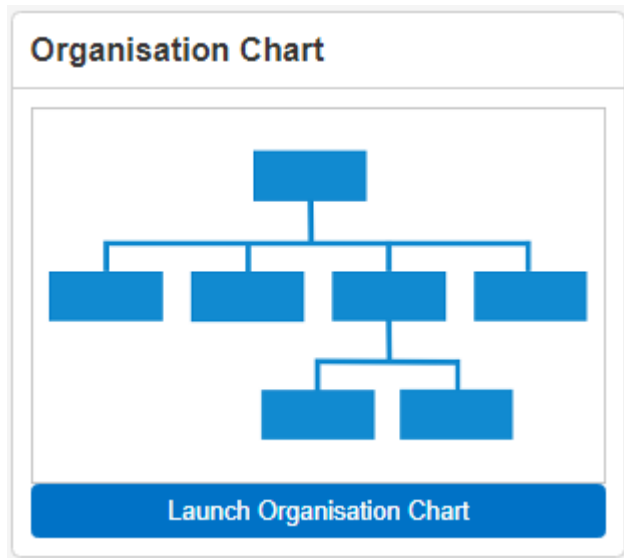
## Team Compliance Portlet



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



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

Thursday  
November 8, 2018

In the next 7 days your team have no events.

View Team Calendar

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

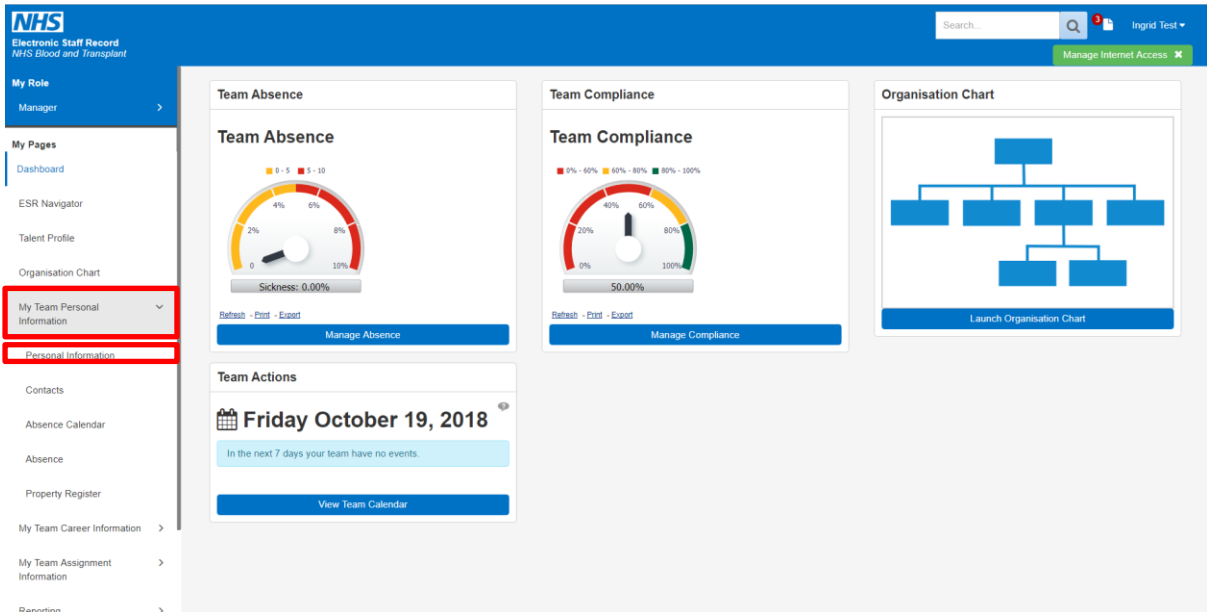
- Upcoming compliance requirements for individual employees you are a manager for.
- Fixed Term Contract end dates.

**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.

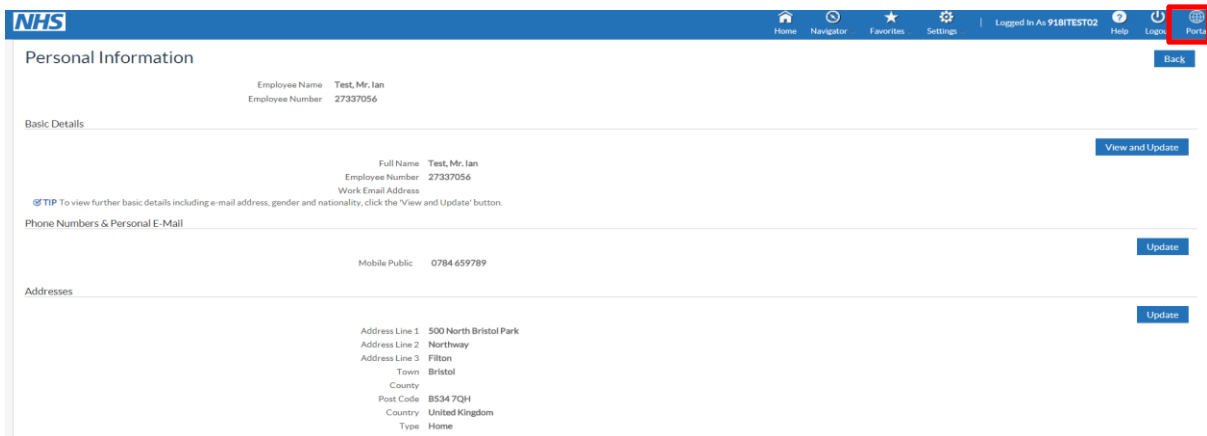
Select My Team Personal Information and then Personal Information to see a list of all team members reporting directly to you.



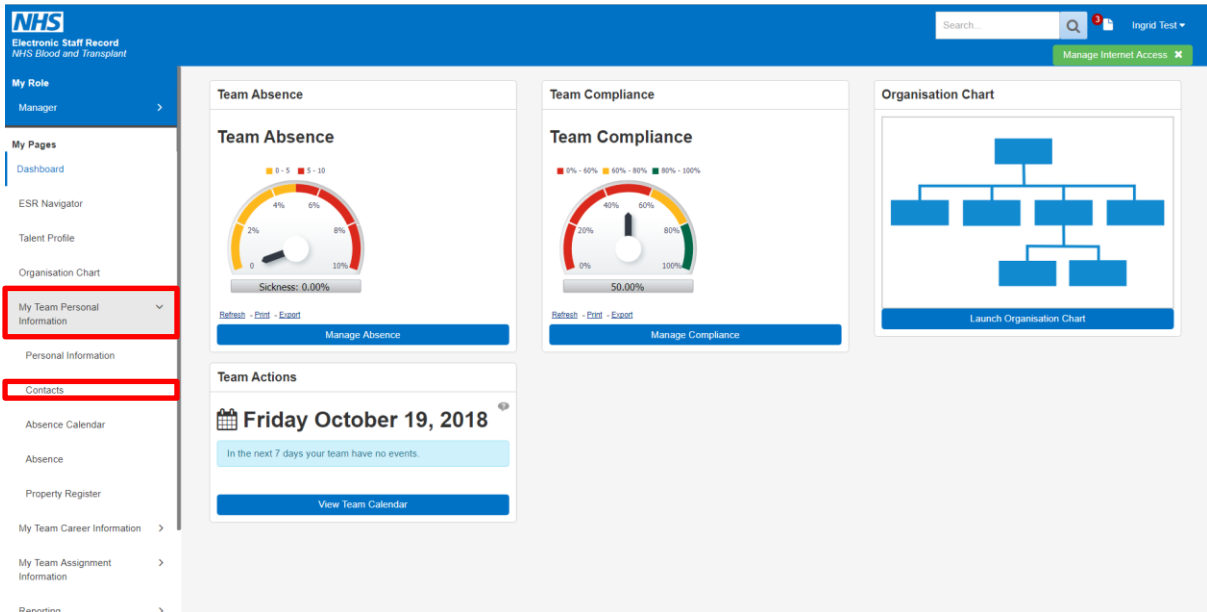
To view / updated personal records for individual members of your team click on the details option.



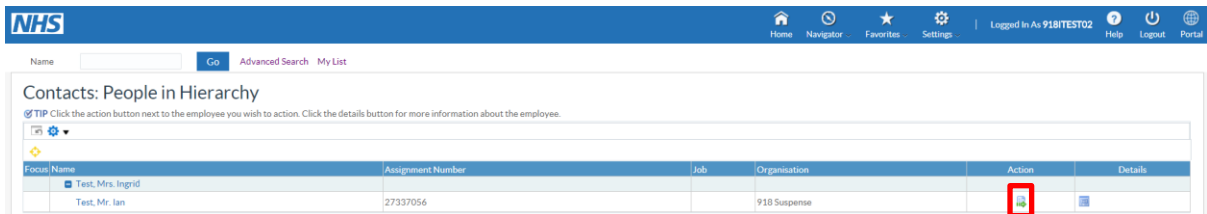
Once you have viewed / updated information click on the Portal icon to return to the dashboard.



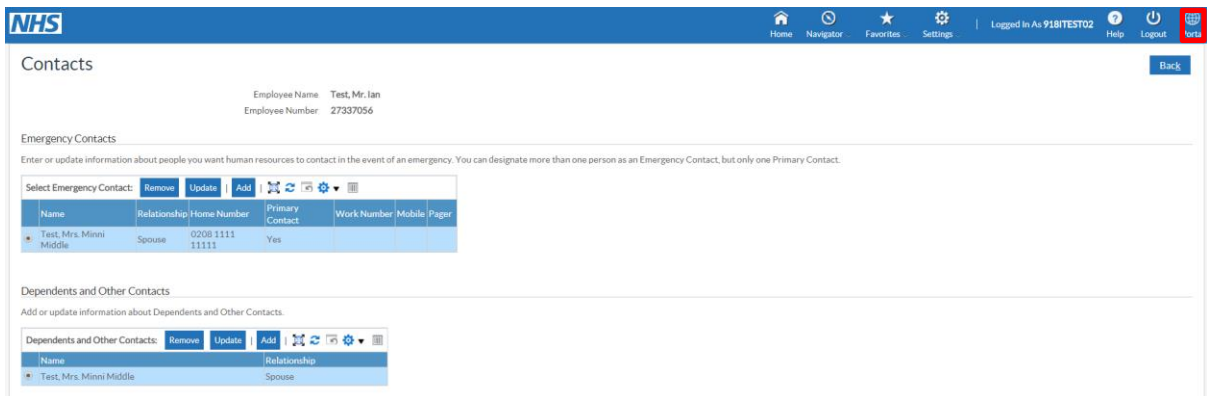
To view emergency contact details for your team, select Contacts.



From the Contact page click on Actions.



Once you have viewed / updated contact information click on the Portal icon to return to the dashboard.



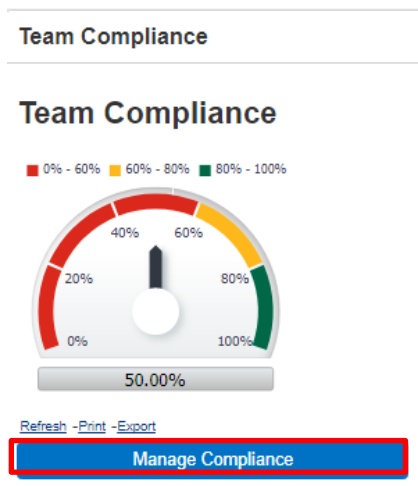
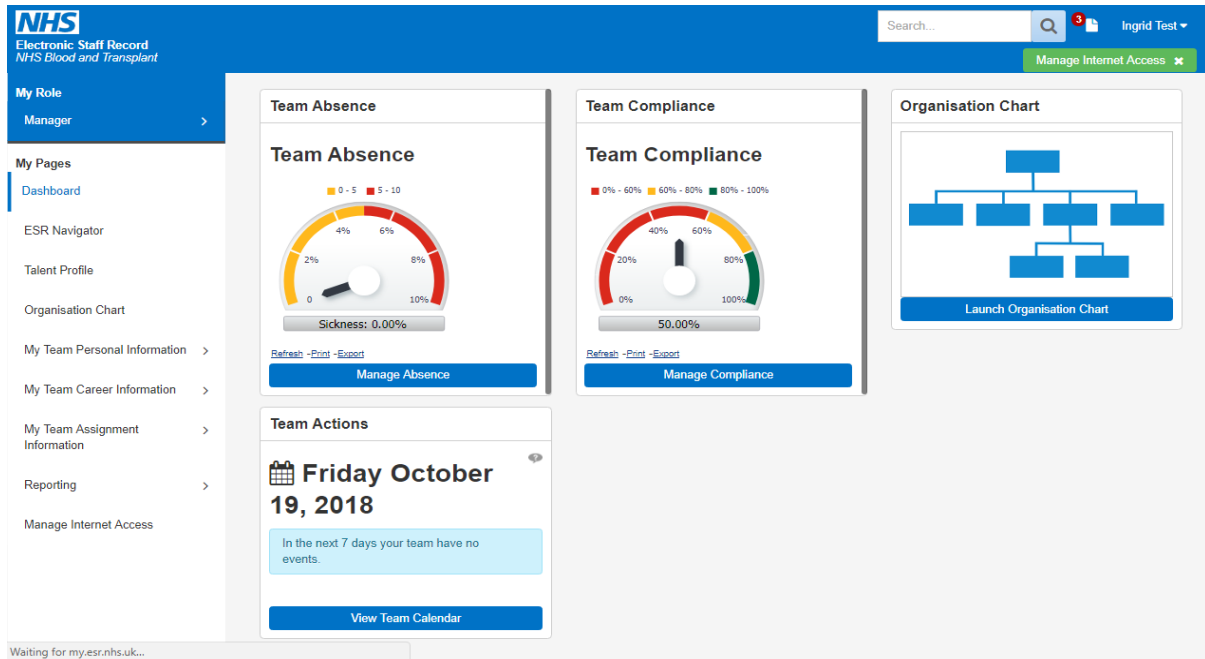
To exit the contact information, click on the portal icon.

## 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.

### Compliance and Competency - Hierarchy View

Competence:  Hierarchy Levels:

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

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:  Hierarchy Levels:

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:  Hierarchy Levels:

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).

Compliance | All Competencies | Awaiting Approval

Tip: To view compliance for any additional assignments, select assignment from drop-down and press Go

27337056 -  Compliance Percentage: 33.3%

Required Competencies Only

Tip: To view required competencies only, tick the checkbox and press Go

Details Competency Name	Competence Level	Min Req	Essential	Expiry Date	Compliance Status	Find Learning	Edit
> P181LOCALINHST (M) Business Continuity - 1 Year			Y	15-Aug-2019	<span style="background-color: green; width: 10px; height: 10px; display: inline-block;"></span>		
> P181LOCALINHST (M) Corporate Induction - No Refresher			Y		<span style="background-color: red; width: 10px; height: 10px; display: inline-block;"></span>		
> P181LOCALINHST (M) Display Screen Equipment User - No Refresher			Y		<span style="background-color: red; width: 10px; height: 10px; display: inline-block;"></span>		

[Show Key](#)

### Team Compliance

0% - 60% 60% - 80% 80% - 100%

50.00%

[Refresh](#) - [Print](#) - [Export](#)

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 in 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 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.

The screenshot shows the 'NHS Compliance Trending Dashboard' with a navigation bar including 'Organisation Compliance', 'Compliance Timeline', and 'Compliance History'. The main content area is titled 'NHS Electronic Staff Record - Business Intelligence' and contains a large filter panel with various dropdown menus and input fields. A 'Dashboard Help' button is visible on the left side. Below the filters is a summary table with the following data:

Organisation	Assignment Count	Required	Achieved	Compliance %	Expiring Soon	Predicted %	Future Enrolments	Predicted % (inc. Enrolments)
918 NHS Blood and Transplant	1	2	1	50.00%	0	50.00%	0	50.00%
918 Suspense	1	2	1	50.00%	0	50.00%	0	50.00%

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

Organisation	Assignment Count	Required	Achieved	Compliance %	Expiring Soon	Predicted %	Future Enrolments	Predicted % (inc. Enrolments)
918 NHS Blood and Transplant	1	2	1	50.00%	0	50.00%	0	50.00%
918 Suspense	1	2	1	50.00%	0	50.00%	0	50.00%

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

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.

The screenshot shows the 'NHS Compliance Dashboard' with a navigation bar including 'Summary', 'Did Not Attend Details', 'Competency Matching by Person', 'Competency Matching', 'Induction Compliance by Person', 'Competency Profile', 'Selective Competency Matching', 'Position Competency Requirements', 'Positions Without Requirements', 'Competence List', and 'Applicant Competency'. The main content area is titled 'NHS Electronic Staff Record - Business Intelligence' and contains a large filter panel. Below the filters is a table with the following data:

Employee Number	Assignment Number	Employee Name	Organisation	Required	Achieved	Compliance %
27397951	27397951	Test, Mrs. Ingrid	918 NHS Blood and Transplant	2	1	50.00%

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.

The screenshot shows the 'NHS Compliance Dashboard' with the 'Competency Matching by Person' tab selected. The dashboard title is 'NHS Electronic Staff Record - Business Intelligence'. Filter settings include: Organisation(s) 918 NHS Blood and Transplant, Staff Group(s) (All Column Values), Assignment Category Fixed Term Temp;N, Person Type(s) Employee;Employee, Employee Person Type(s) (All Column Values), Assignment Status (All Column Values), Occupation Code (All Column Values), Role --Select Value--, Primary Assignments Only --Select--, Assignment Number --Select Value--, Supplementary Role --Select Value--, Employee Location (All Column Values). There are 'Next', 'Apply', and 'Reset' buttons. Below the filters, there are sections for 'Effective Date (Historical Dates Only) 23/08/2018 00:00:00', 'Competencies --Select Value--', 'Competency Framework(s) KSF;LANG;LOCAL;M', 'Employee Hire Date <= 23/08/2018 00:00:00', and 'Exclude Open Sickness Absence - Start Date <='. There are 'Apply' and 'Reset' buttons. A 'Group by' section shows 'Organisation' and 'and'. A data table is displayed below:

Employee Number	Assignment Number	Employee Name	Organisation	Required	Achieved	Compliance %
27397951	27397951	Test, Mrs. Ingrid	918 NHS Blood and Transplant	2	1	50.00%

At the bottom, a breadcrumb trail is visible: 'NHS Compliance Trending Dashboard: Organisation Compliance > NHS Compliance Dashboard: Competency Matching by Person'. The 'NHS Compliance Trending Dashboard' part is highlighted with a red box.

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.

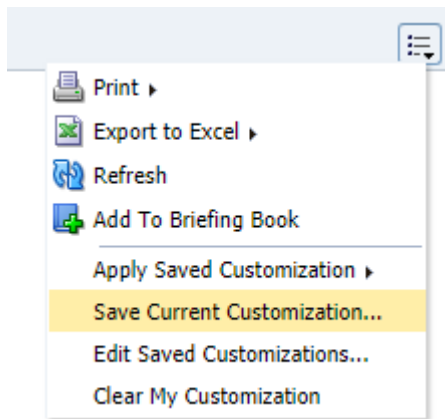
The screenshot shows the 'NHS Compliance Dashboard' with the 'Competency Matching by Person' tab selected. The dashboard title is 'NHS Electronic Staff Record - Business Intelligence'. Filter settings include: Organisation(s) (All Column Values), Staff Group(s) (All Column Values), Assignment Category Fixed Term Temp;N, Person Type(s) Employee;Employee, Employee Person Type(s) (All Column Values), Assignment Status (All Column Values), Occupation Code (All Column Values), Primary Assignments Only --Select--, Employee Location (All Column Values). The 'Amber From' is set to 60 and 'Green From' is set to 90, both highlighted with a red box. There are 'Next', 'Apply', and 'Reset' buttons. Below the filters, there are sections for 'Effective Date (Historical Dates Only) 23/08/2018 00:00:00', 'Competencies (All Column Values)', 'Competency Framework(s) KSF;LANG;LOCAL;M', 'Employee Hire Date <= 23/08/2018', and 'Exclude Open Sickness Absence - Start Date <='. There are 'Apply' and 'Reset' buttons. A 'Group by' section shows 'Organisation' and 'and'. A data table is displayed below:

Organisation	Assignment Count	Required	Achieved	Compliance %	Expiring Soon	Predicted %	Future Enrolments	Predicted % (inc. Enrolments)
918 NHS Blood and Transplant	1	2	1	50.00%	0	50.00%	0	50.00%
918 Suspense	1	2	1	50.00%	0	50.00%	0	50.00%

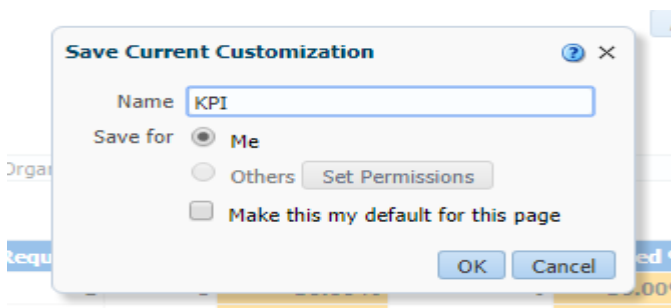
At the bottom, a breadcrumb trail is visible: 'NHS Compliance Trending Dashboard: Organisation Compliance > NHS Compliance Dashboard: Competency Matching by Person'. The 'Apply' button is highlighted with a red box.


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

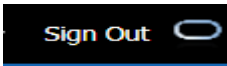




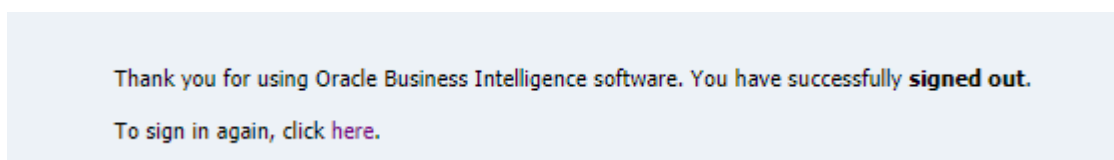
Give the customization a Name (you can also set the option to use this customization by default for each time you run this report if required by ticking the box). Then click OK.



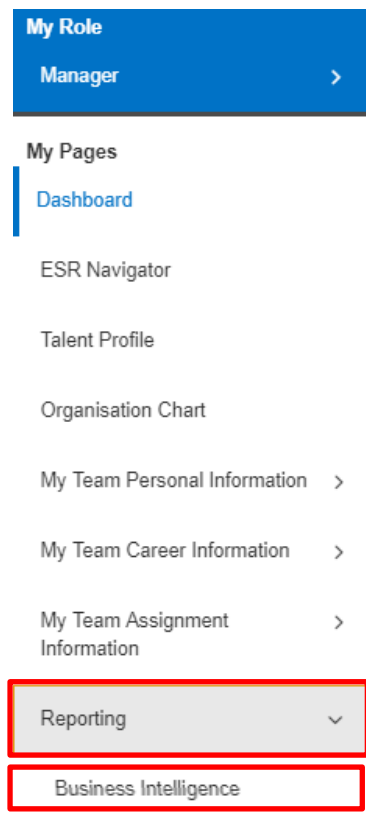
When you are running a report there is a symbol in the top right hand corner.  This symbol will spin to show that the BI report is running. If the symbol is not spinning, then this could be an indication that your BI session has timed out and you would need to log back in through your Manager account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

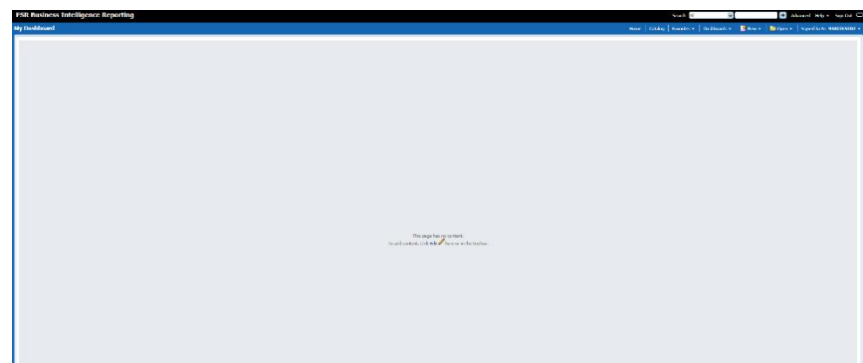


## How to access other Business Intelligence Dashboards

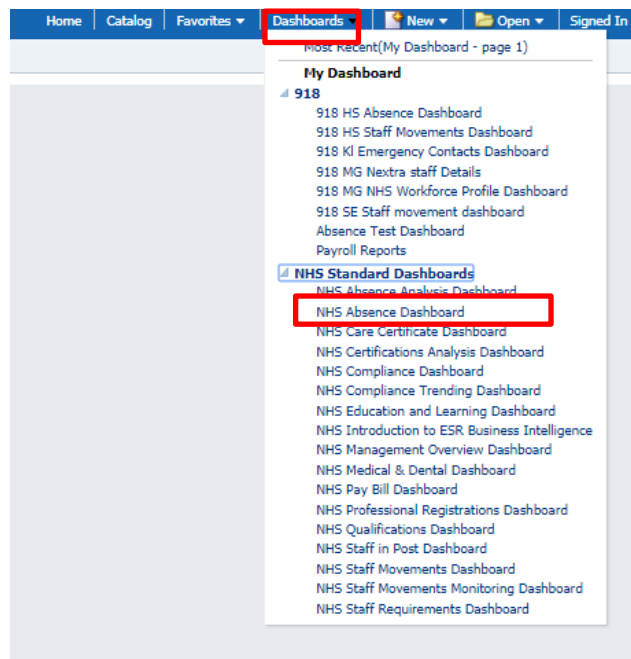


There are a range of other standard reports available in BI (indicated as Dashboard Reports). To view and run these reports select the option on the left-hand side of the Manager Dashboard – Reporting and then Business Intelligence

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](#).