

# ESR Roadmap and Portal Progress

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Transforming User Experience		<p>Internet Enablement</p>	<p>Portal Beta Test (including mobile)</p> <p>EBS UI skin part 1 (including mobile)</p> <p>ESS UI Optimisation Part 1</p> <p>MSS UI Optimisation Part 1</p> <p>OLM "Quick Wins"</p>				
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Increasing Business functionality	<p>SS2 On-line payslip</p> <p>SA1 Restrict Own record</p> <p>SA8 Proxy Users</p>		<p>GR1 Welsh requirements</p> <p>GR8 E-mail notification Part 1</p> <p>PAY1 Payroll analysis</p> <p>PAY5 NI changes</p> <p>SS2 On-line Payslip Part 2</p>				

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**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 Talent Profile
  - Request Internet Access

**Announcements**

View All (36)

**My Compliance**

Assignment: 20000169 - Cardiologist ▾

Percentage Compliance: 20%

View Compliance Matrix

**My Total Reward Statements**

Tax year: 2016-2017

Launch my TRS

**My Annual Leave**

Assignment: 20000169 ▾

Accrual Plan: Annual Leave Hours 1 NHS

Entitlement:	59.25 Hours
Taken:	15 Hours
Booked:	0 Hours
Remaining:	43.25 Hours

Create Annual Leave

View Absence Calendar

**My Personal Information**

Name: Test Employee  
Address: Address Line 1, Address Line 2, Address Line 3, Warwick, Warwickshire, CV34 6NZ, United Kingdom  
Home: 01926 212 232  
Mobile: 07876 232 123  
Work: 01211234567  
Position: Cardiologist

Update My Details

**My Payslip**

View or download your latest payslip(s) or access ESR to view your full payslip history

- 20000169 - Cardiologist  
Pay date: 29-Jan-2017

View all Payslips

**My Enrolments And e-Learning**

A maximum of 20 open e-learning enrolments are displayed below. Please select the Learner Homepage button to view all enrolment details.

298 - HFMA Finance Modules

Play

Status: Incomplete

Learner Homepage

# ESR Portal – My ESR

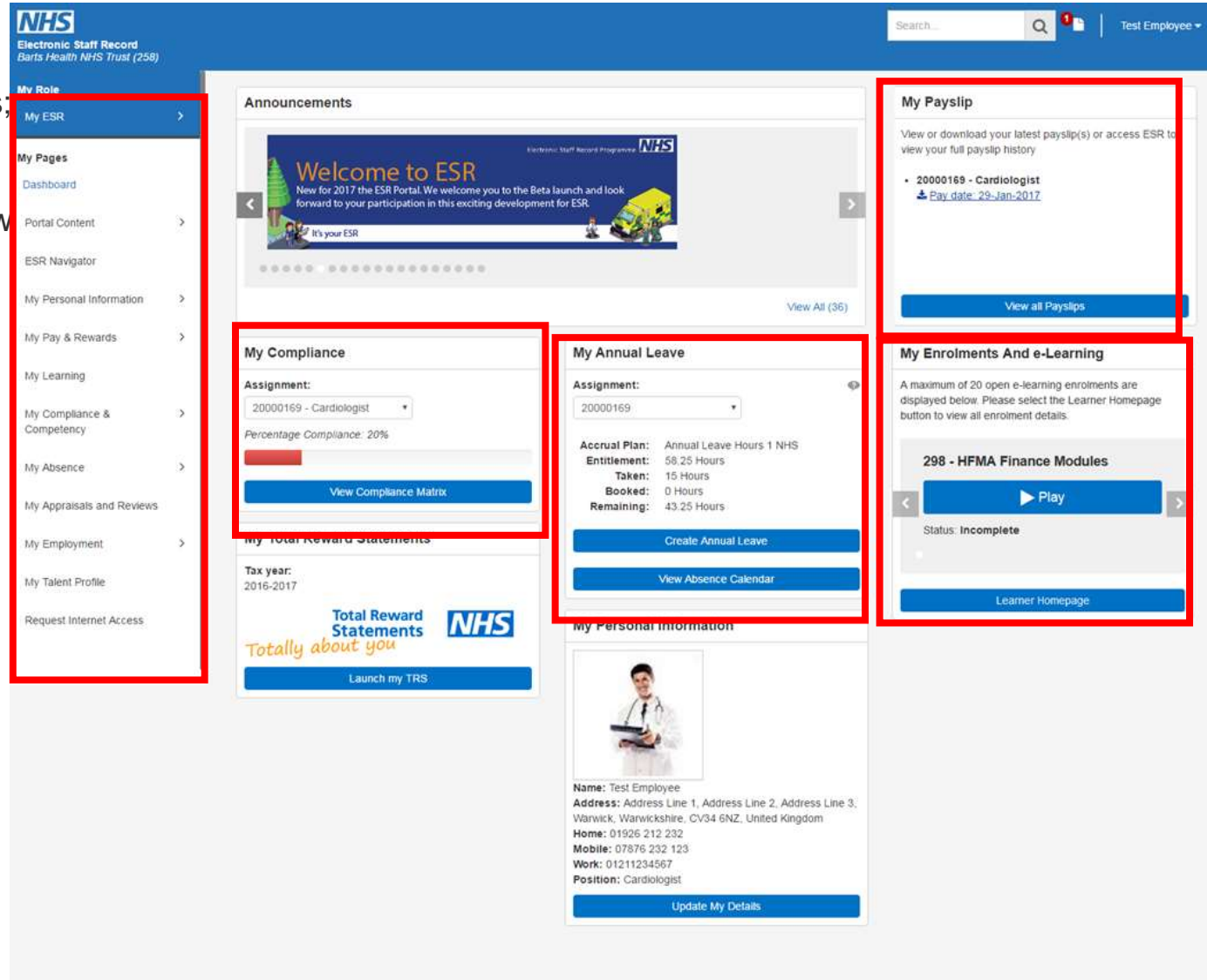
Electronic Staff Record Programme



Dedicated portlet to indicate the current level of compliance against competency requirements; Improved navigation to employee menus; Total compliance percentage and status indicator bar for simple view of the current position;

Navigate directly to the Compliance Matrix to view the full competency and compliance profile. Dedicated portlet to indicate current annual leave entitlement, leave already taken, any booked in the future and the remaining allowance;

Navigate directly to either create a new annual leave request for the selected assignment or go to the Absence Calendar in Self Service to view all leave details.



National 'portlet' for recent payslips;

Easy access to all payslip history with employer.

Shows most recently interacted e-learning enrolments;

Click to play directly from the portal;

Improved integration/ automation with Certification renewal.

# My ESR – Focus On Upcoming Tasks

Electronic Staff Record Programme



The Upcoming Tasks portlet acts as a calendar and reminder for users, of any classroom bookings they may have within the next 7 days

Clicking on the View my Calendar button opens a new Portal page displaying the month view.

The screenshot shows the NHS Electronic Staff Record (ESR) interface. The main content area is titled 'ESS Upcoming Tasks' and features a calendar icon followed by the text 'Tuesday February 14, 2017'. Below this, a light blue box contains the message 'You have no classes in the next 7 days.' At the bottom of this section is a prominent blue button labeled 'View My Calendar'. To the right, there are sections for 'My Payslip' (showing a pay date of 26-Jan-2017) and 'My Enrolments And e-Learning' (showing a '298 - HFMA Finance Modules' enrolment with a 'Play' button and 'Status: Incomplete'). On the left, a 'My Favourites' list includes links to various personal information and records sections. At the bottom right, a smaller version of the 'ESS Upcoming Tasks' portlet is highlighted with a red border, mirroring the main content area.

Calendar view of specific date driven events within ESR for the Employee, including Class bookings, Leave, Expiry of Certifications, Visa, Fixed Term Contracts and any next Appraisal/Review dates

Manager Dashboard for all users with Manager, Supervisor or Administrator Self Service

The dashboard contains 3 default national reports – navigate directly to the supporting detail in ESR BI or open Self Service forms

MSS Team Actions – Calendar view of date driven events for your team

Indicator of who from your team have confirmed Leave or Class Enrolments in the next 7 days

Click the View Team Calendar button for more details

The screenshot displays the NHS Manager Dashboard interface. The top navigation bar includes the NHS logo, the text 'Electronic Staff Record Barts Health NHS Trust (258)', a search bar, and the user name 'JAMES HOFMAN'. A left-hand sidebar lists 'My Role' (Manager) and 'My Pages' (Dashboard, Talent Profile, My Team Personal Information, My Team Career Information, My Team Assignment Information, Manage Hires, Reporting, Talent Profile, Manage Hires). The main content area features four widgets: 'Team Absence' (gauge at 2.26%), 'Team Compliance' (gauge at 41.80%), 'Team Appraisals' (gauge at 61.33%), and 'MSS Team Actions' (calendar view for Tuesday February 14, 2017, with a 'View Team Calendar' button). A red border highlights the three gauge widgets and the MSS Team Actions widget.

- **HR Dashboard:**

- Actual Vs Establishment FTE BI report
- Starters & Leavers Summary BI Report
- Leavers by Reason BI Report
- Payroll Exceptions Report

- **Learning Management Dashboard:**

- Compliance Rate Gauge
- DNA Rate over last month
- Bottom 10 orgs by compliance
- Upcoming classes

- **Payroll Dashboard:**

- Payroll Exceptions
- Gross & Net Pay BI graph

- **Recruitment Dashboard:**

- Applicant Summary
- Applicant Management



- Engage with your IT department to ensure they have at least the team who will be provisioning on the day set up with the correct IT specification, i.e. IE11 and Java 1.8.0\_74
- Ensure IT have added 2 sites to the Trusted sites by group policy
- <https://my-staging.esr.nhs.uk>
- <https://my.esr.nhs.uk>
- Ensure IT have checked that the following IP address is not blocked: 194.203.48.100
- Decide and allocate the two or three new URPs in advance of going live; Portal Administrator, Content Editor and or Content Administrator these will have to be given to different employees
- Agree in advance what Portlets, Local Links and communications are going to be visible on go live day
- On receipt of your provisioning letter from the ESR central team inform AM or FA that you are happy with the date

- Time and availability permitting arrange for a pre provisioning meeting or at least a telephone call
- Read the Portal set up and the Administrator Documents
- Liaise with other professional users of ESR around the portlets they would want to see when they log in
- Ensure that on the day of provisioning we have someone available that can raise SRs
- **CATCH MIKE OR I TODAY IF YOU HAVENT BEEN GIVEN A DATE TO GO LIVE!**

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The developments referenced within the presentation (as always) are subject to successful confirmation of design, testing and release scheduling

- Common ID – One user name and Password
- Two Factor Authentication- enabling Access for Managers / Supervisors access to ESR via the internet
- Portal updates
- Pay Leavers up to the 5<sup>th</sup> Month

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Oracle 12.2 Upgrade

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Electronic Staff Record Programme



Thank you

It's your ESR