SHSC ESR Access User Guide November 2018

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ESR General Facts

ESR (Electronic Staff Records) is the system used by a majority of NHS trusts to keep track of employee information. This includes personal information, pay information, mandatory training information and other types of staff information.

All SHSC staff are encouraged to consult their profile and check the accuracy of the information held. Staff can also choose to opt out of paper payslips using the ESR portal.

Training information including which topics are mandatory and expiry dates are accessible through ESR. ELearning as a way to complete training is available on the Oracle platform through ESR.

Access from non-SHSC devices

This is now enabled as standard for users accessing ESR using a Username and Password combination. Smartcard users will need to set up a password for remote access, and will only have access to limited functionality (not affecting the ESR Spine). Remote Access allows you to set up access the ESR from a non-trust computer. For example, if you regularly work at GP surgeries, in other trusts, at university, or you would like to log on and view your online payslips form home, you are able to do this from your most convenient site rather than coming to an SHSC site.

Please use the following web link to access ESR: https://my.esr.nhs.uk/

Please be aware the support you can access when using a non-SHSC device will be different. Start by using the troubleshooting guidelines.

Help and contacts

- For any ESR related queries, ring 011422 (63301) then press 2 and 2 or email workforce@shsc.nhs.uk

- If your query is training or E.Learning related please ring 011422 (62233) or email training@shsc.nhs.uk

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How do I log in? (Username/Password)

(I do not use a smartcard to access ESR)

ESR can be accessed through all Trust PC's with an icon on the desktop or from https://my.esr.nhs.uk/. This is for Username/Password users or if you have a Smartcard and have set up an "Internet Access" password. If you have an ESR Smartcard but have not set an "Internet Access" Password, please go to How to log in? (Smartcard).
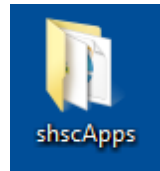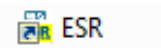
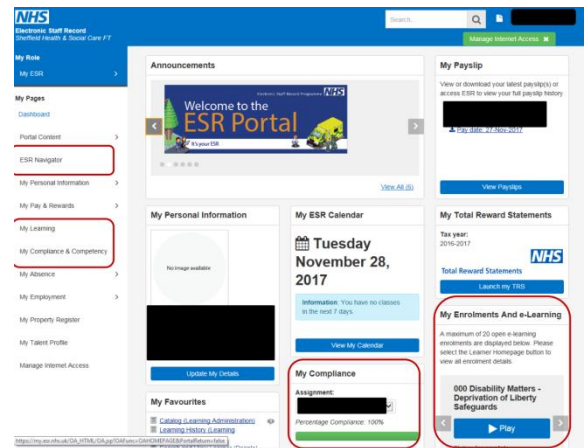|	
1) Click on the SHSC Apps icon on your Desktop	2) Choose "ESR"
3) Enter your ESR Username and Password. Usernames follow the format: 457FSURNAM**. F: first letter of your first name; SURNAM: 6 letters from your Surname; ** Two digit number. How do I retrieve Usernames and Passwords?	4) The first page you access is your ESR Portal. How to Use my ESR Portal?

Retrieving username or password
(I do not use a smartcard to access ESR)

Never accessed ESR or have forgotten a username or password, follow the steps below to request them to be sent on your trust email.

1) Click on the SHSC Apps icon on your Desktop
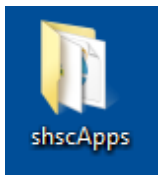
2) Choose "ESR"

3) Click on "Forgotten|Request Username/Password|Unlock Account"

4) Enter your Username and email address if you have forgotten your Password. Click "Forgot Password" once and wait for the page to load.
   OR Enter your email address and date of Birth if you have forgotten your Username. Click "Forgot Username" once and wait for the page to load

5) An email will be sent to you with a link to reset your password if you have requested a Password reset or stating your Username and a link to reset your password if you have requested a Username.

6) Passwords
   ✓ Must contain 8 characters;
   ✓ Must contain at least one letter and at least 1 number;
   ✓ Must not contain any repeating characters (e.g. She**ff**ield; 2**00**9);
   ✓ Must not contain 3 sequential characters or more (e.g. collating sequential **abc**; **123**, keyboard sequential **qwerty**);
   ✓ Must not contain your Username, first name or last name;
   ✓ Must not contain any of a list of restricted words based on wordlists which are commonly used in dictionary-based attacks (this is for example *days of the week, months, football team names, pet names, NHS organisation location names, some NHS, Medical and ESR specific terms*).
   ✓ You cannot change a password to any of the previous 5 passwords you have used.

7) Accounts will become locked after three consecutive failed logon attempts. If your account has become locked, you can either wait 5 days and try again or contact the appropriate support team

8) Please always bear in mind the SHSC password policy and best practice with managing passwords.

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How to log in? (Smartcard)
(I use a SMARTCARD to access ESR – Electronic Staff Records)

If you have a smartcard, you will need the IT helpdesk to help you with an initial set up which involves installing an identity agent software and the correct versions on Java software.
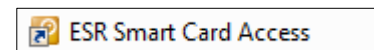
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1) Insert you smartcard in the keyboard/USB smartcard reader/laptop.
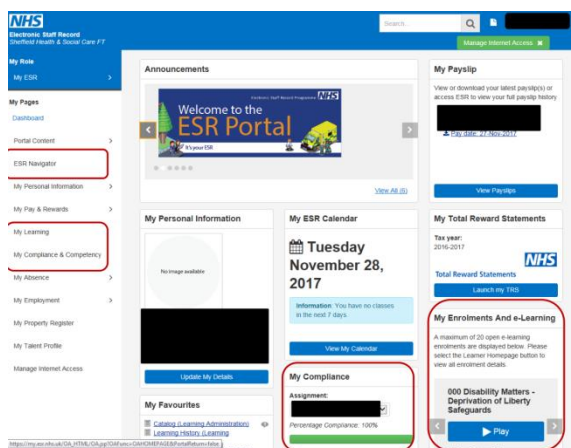
2) The Identity agent pops up, type in your code/password.
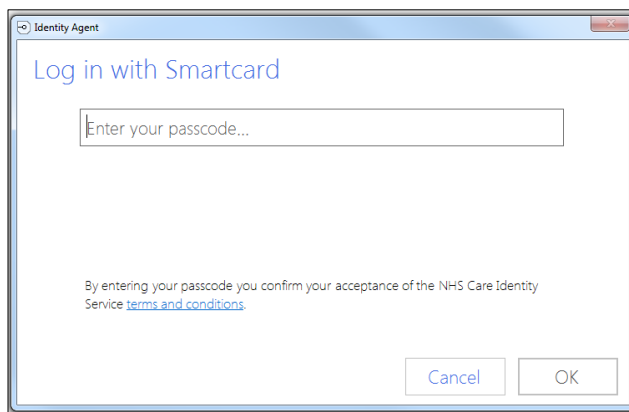
3) Click on the SHSC Apps icon on your Desktop
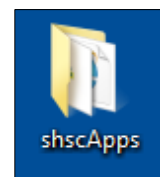
4) Choose "ESR Smartcard Access"

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5) The first page you access is your ESR Portal.

[How to Use my ESR Portal?](#)

6) Please [contact us](#) if you are an ESR smartcard user or ring the IT helpdesk if you are accessing ESR and need support.

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Setting up "Internet Access"

Remote Access allows you to set up access to ESR from a non Trust computer for selected URPs such as "Employee Self Service Limited Access". This is a one off process, to enable or create a password for your ESR account. After this set up you will be able to access ESR outside of the N3 network (e.g. trust computers).

This is useful if:

- If you are a username/password user, and you want to use ESR outside the trust premises (at home, from a GP surgery, at university Etc.) This is now enabled as standard for users accessing ESR using a Username and Password combination.
- If you are a Smartcard user, this can be used to set up a password so you can access ESR with a username/password combination wither within our outside the trust premises.
  Please note: If you are a system administrator on ESR, or a manager/administrator self-service user, internet access will only enable you to use your information as an employee; you still need to use a smartcard on a trust computer to use your administrator access.

1) You will need to log in to a Trust computer using your Smartcard to set up the Remote Internet Access.

2) Click on the "Manage Internet Access" option at the top right corner of the screen. `Manage Internet Access ✖`

3) A. if you are a username/password user, click on the "approve" button. You will now have access from non-trust computers.

   B. If you are a smartcard user, you will use your ESR username starting with "457" but will set up a password for ESR Remote Access. You can also use this to manage your password in the future; administrators will not be able to reset a password for you. If you forget your password for your Remote Internet Access login, you will need to log in using your Smartcard and reset your password using the "Manage Internet Access" button.

Request Internet Access
☑ TIP Please enter a new password of your choice to enable access to internet enabled URPs. You will also need to use your existing ESR username, as shown below.

ESR Username	████████
* New Password	[ ]
* Retype Password	[ ]
Status	**Approved**

[Submit] [Cancel]

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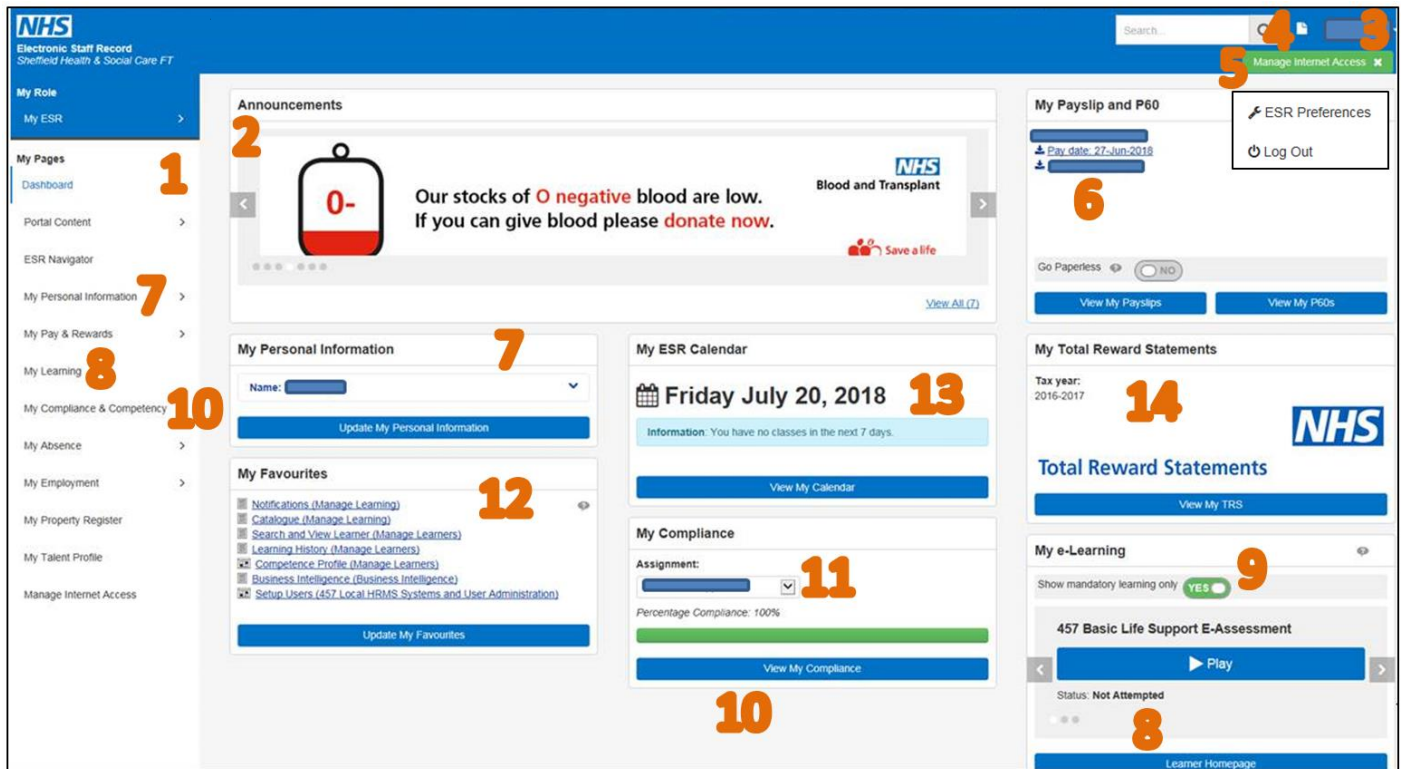
4) Once you have created your password, use the following link to access ESR: https://my.esr.nhs.uk/

Please be aware the support team cannot reset passwords that have been created for "Internet Access". These can only be reset by the user themselves using the same route of access.

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How to use my ESR Portal

The ESR Portal is a way for you to view information about yourself. You can manage your information for Workforce Information & Training related purposes. You can access the content of the portlets by clicking on the blue title under each of them.

1. **ESR Navigator**: The ESR Navigator shows what you can access on ESR. Select your ESR role if you have more than one. Expand and collapse the categories using the arrows next to the headings.

2. **Announcements**: Latest news, view different announcements by clicking on the left and right arrows.

3. By Clicking on your name, make the link appear to your "ESR Preferences" and the "Logout" button.

4. The white page is a link to your **ESR notifications**. You may receive emails letting you know you have notifications to access.

5. "**Manage Internet Access**", this is useful for ESR Smartcard users, explained in (see ESR & Workforce Info Userguide)

6. "**Payslips portlet**", go paperless using this and consult your payslips. More information on ESR & Workforce Info guide

7. "**Personal information**", collapse and expand using the arrow. More information on the ESR & Workforce Info guide

8. "**My Learning" page** can be accessed there, more information: ESR & Training Userguide

9. **E.Learning enrolments:** View up to 20 E.Learning enrolments and play from this portlet, if you use the "mandatory training only" function, the portlet will show only E.Learning connected to valid certifications. We recommend using this.

10. "**My Compliance and Competency" page** is explained more in depth: see ESR & Training Userguide

11. "**My Compliance**" shows at a glance your percentage of compliance on your primary assignment. If you have more than one assignment, use the drop down menu to select the assignment you want to consult. You may have different training requirements for your different assignments resulting in a different compliance status.

12. Set **favourites** in this portlet so the pages you access most often appear on your Dashboard.

13. "**ESR Calendar**": you can view key dates related to events that are kept track of on ESR, more information on ESR & Workforce Info in the Userguide.

14. "**Total Rewards Statements**" portlet: use this to launch your TRS page, including pension information.

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ESR Notifications

[Secure] You Have Open ESR Notifications - Please log in to ESR to view. Do Not Reply to this mail.

esr.wfmPROD@nhs.net

Sent: Mon 23/07/2018 04:32

To:

✉ Message 🔲 Encrypted_Message.htm (12 KB)

PRIVATE AND CONFIDENTIAL

You have received an email message secured by Private Post. Please open the file called Encrypted_Message.htm to read the message.

- -
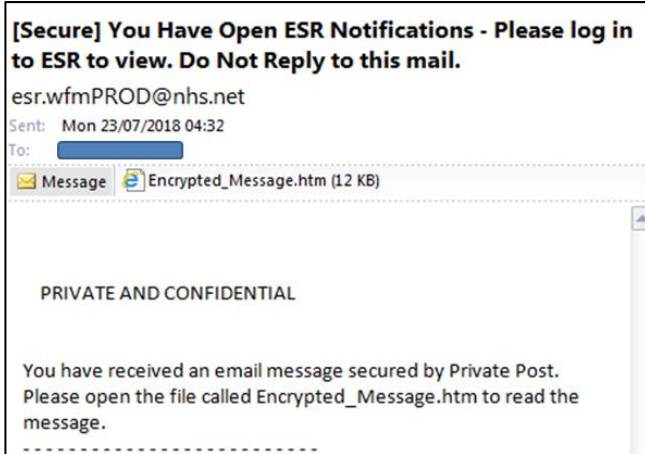
You will receive notifications from ESR on your email address recorded on the system. As we do not use nhs.net email addresses, you need to log on to the system to read the content of the notification.

You can do this by clicking on the white page at the top right corner of the portal welcome page.

For notifications about training expiries:

- Ignore the notifications about "Certification Subscriptions" (see ESR & Training Userguide)

- Training expiry notifications will mention "Competency update/expiry date" (see ESR & Training Userguide)

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Troubleshooting

Working on a non-SHSC device

If you are using a computer on the SHSC network, the settings below should be your default settings when using ESR.
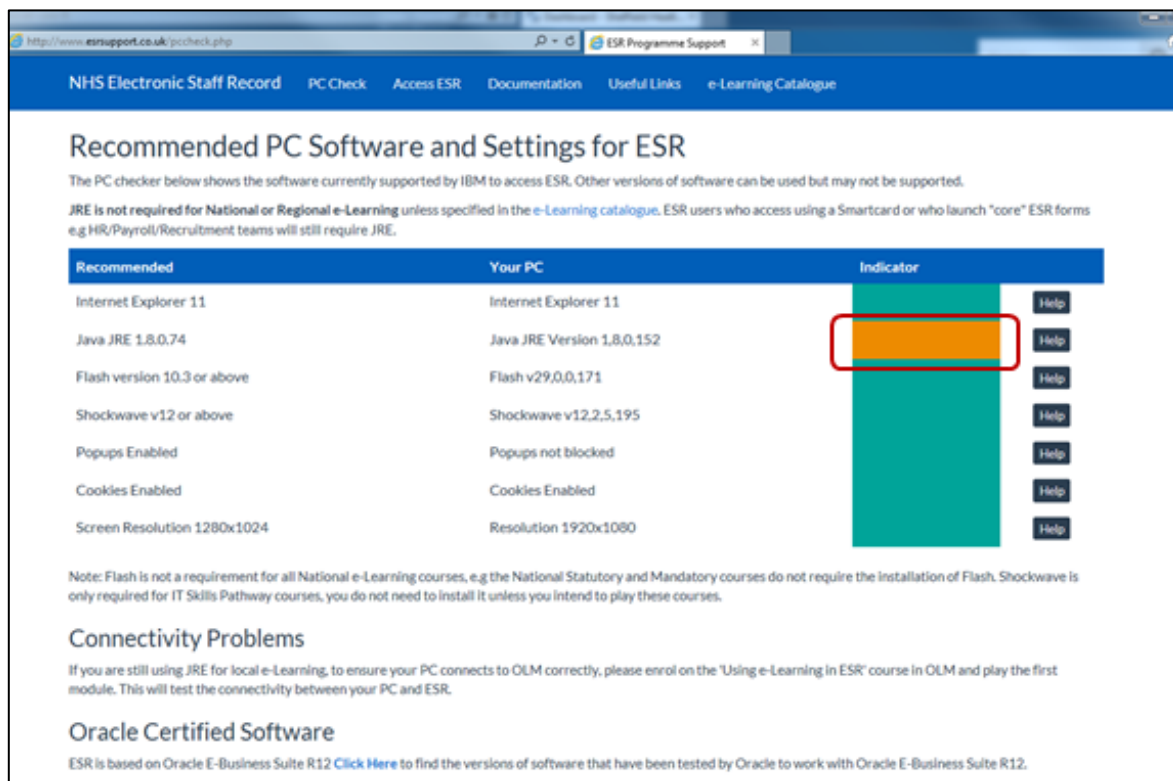
If you are using your own device or a device at another employer's, please follow the guidelines as below:
- Use Internet Explorer 11; Note: other browsers may appear to work but issues will need to be replicated in IE11 to be reported with our suppliers.
- Turn off pop up blockers (click on "Tools" (or Alt+X Keyboard shortcut); Select "Internet Options"; "Privacy" tab; un-tick the box next to "Turn on Pop-up Blocker". If you are using an SHSC computer, the box will be ticked, but the ESR website is an exception in the "Settings".
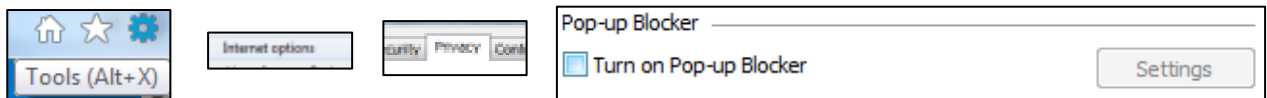
- To diagnose issues, and if you are reporting a problem, please send a screenshot of the PC Checker when you are having the issue. This checks if your PC has the components it needs to use ESR: Link to PC Checker: http://www.esrsupport.co.uk/pccheck.php

Example: Java is a slightly different version from the optimum to play some of the E.Learning content.

All the components may not have the same importance, e.g. some E.Learning will need Java which is not needed to use the rest of ESR in Employee self-service.

If your problems persist: Contact us, send us a screenshot of the full screen when you have an issue, if there is an error message, send us the exact text of the error. How to I take a screenshot?

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How do I take a screenshot?

A screenshot is a way to take a picture of the screen you are working on; you may want to take a screenshot either for your own records or to show someone else.

1. Navigate to the screen you want to take a screenshot of.
2. Press the "print screen" button on your keyboard. This may be abbreviated "PrtScn", depending on your keyboard, you may need to press Alt+PrintScreen or Windows+PrintScreen.
3. Open a Word document or an email
4. Paste (right click and paste or Ctrl+V keyboard shortcut) in the document or email.
5. You can them manipulate, change size or crop the picture.
6. If you are sending us a screenshot because there is an issue with ESR, please send the full screen, we will need to look at what browser you are using. If you are completing E.Learning, we need to know the time and date the system registered to narrow our searches. This is displayed in the bottom right of the screen if you send us full screen screenshots and is very useful to us.
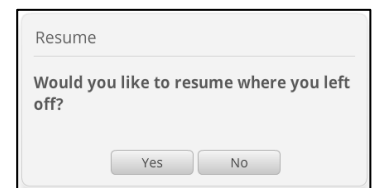
Has my E.Learning saved? (see ESR & Training Userguide)


- To make sure your E.Learning course saves, click the house button when you exit the course.

  This saves where in the course you are leaving so you can pick up in the same place when you are ready to continue.

- If you think you have completed a course but the competence has not updated and the status still shows "Incomplete": Check you have completed all the modules in the course. Click to play the course again and select "pick up where you left off". Check that you have completed all the modules for the course, then clicked the house button in the top right corner of the screen.
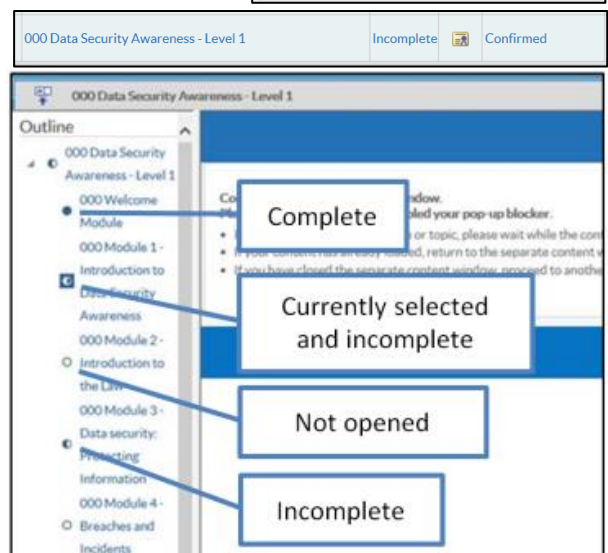
- If the status on the course is "Completed" but the competence has not updated, you may not have been subscribed to an up to date certification. Contact us if this happens with your full name or employee number and the name of the course.

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