

Electronic Staff Record Programme

Can your workforce access ESR at anytime, anywhere?

Digital technology touches many parts of our lives, from keeping in touch with our friends using social media, booking a taxi through an App or managing our banking online – we all frequently interact with technology.

Self Service allows the NHS workforce the ability to access ESR remotely at anytime, anywhere from all mobile devices. From an applicant completing eLearning prior to starting in a new role, an employee accessing their payslip and completing online training, to a manager accessing the vast array of information about their teams to manage compliance and sickness, viewing team personal information and making changes within Manager Self Service. Remote access is also available for corporate teams to help manage ESR data through BI within their subject area.



Top Tip... Use the Announcement and Local Links portlets on the ESR Portal to communicate important messages and links to web pages or PDF documents to your staff. Click [here](#) for guidance.

What steps can I take to enable remote access?

Follow the steps below to enable remote access for employees, managers and professional ESR users.



Enabling Applicant & Employee Access

Action

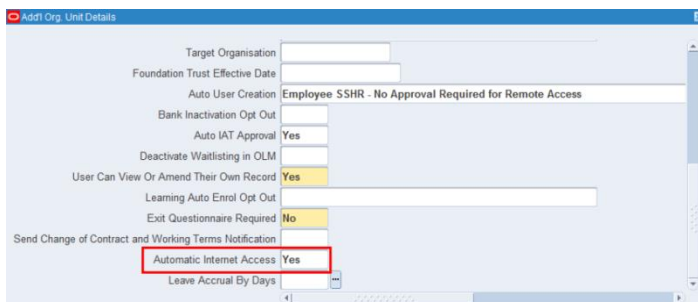
Set Automatic Internet Access at organisation level.

Purpose

This will allow remote access to all ESR users with Employee Self Service, Employee Self Service Limited Access and External Learner User Responsibility Profiles (URPs).

Step by Step Instructions

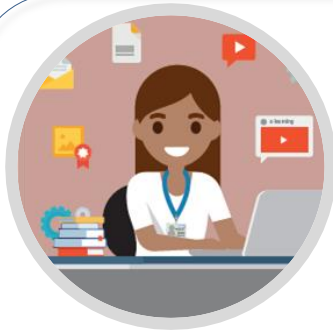
1. Login to ESR > XXX Local Workstructures Administration > Organisation > Description.
2. Search for your Organisation (using 'Type' of Trust).
3. Click in Description Flex Field DFF (beer mug).
4. Set **Automatic Internet Access** field to 'Yes'.



Further guidance is available [here](#) (HSCN/N3 access required).

System Administration Guidance

Ensure a minimum of two ESR users are assigned the Local HRMS Systems and User Administration URP. This URP is used to assign URPs, role access and to reset user accounts.



Enabling Managers Access

Action

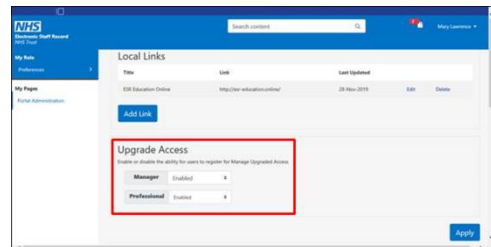
Set Upgrade Access (Manager) at organisation level.

Purpose

This will allow remote access to Manager Dashboard and associated functionality for user with Manager, Supervisor or Administrator Self Service User Responsibility Profiles (URPs).

Step by Step Instructions

1. Login to ESR > Portal Administration.
2. Scroll to the 'Upgrade Access' section.
3. In the **Manager** field, use arrow and select 'Enabled'.
4. Click the **Apply** button.



Guidance

The manager, supervisor or administrator must already have Self Service Internet Access before requesting manager level internet access. Once set, they select 'Manage Internet Access' on their ESR Portal on a work computer to register a mobile phone number. This is a two factor authentication process requiring a one time passcode (OTP) to be sent to their mobile number.

Once registered they can access Self Service remotely whenever they need to, by clicking 'Upgrade Access' and entering the OTP sent to their registered device to authenticate each session thereafter.

Further guidance is available [here](#) (HSCN/N3 access required).



Enabling Professional ESR Users Access

Action

Set Upgrade Access (Professional) at organisation level.

Purpose

This will allow remote access to all Professional ESR Users enabling them access to their professional dashboards and associated BI reports in ESR over the internet. Please note this does not include Local BI Administration.

Step by Step Instructions

Follow 'Step by Step Instructions' above in 'Enabling Managers Access' section, but instead of the Manager field, select 'Enabled' in the Professional field.

The functionality works in the same way as Manager access with two factor authentication.

Further guidance is available [here](#) (HSCN/N3 access required).

Would you like to find out more? Take a tour...

Applicant

Employee

Manager

Professional ESR User



Where can I obtain further support and guidance?



Contact your regional [NHS ESR Functional Account Manager](#)