

ESR Annual Leave Entitlement Report via Supervisor Self Service

All annual leave entitlements are generated by ESR, therefore it is possible for those with Supervisor Self Service access to report on available balances at a specified point in time.

Follow the steps below to find out how much entitlement your team members are due, how much has been taken* and remaining balances*.

*NOTE FOR THOSE WHO USE HEALTHROSTER TO MANAGE LEAVE. ROSTER LEAVE DATA IS TRANSFERRED TO ESR ONCE A MONTH COVERING THE LAST FULL MONTH. ESR WILL THEREFORE ONLY SHOW TAKEN LEAVE UP TO THE END OF THE LAST COMPLETE MONTH AND WILL NOT SHOW ANY PLANNED LEAVE.

You will need:

- Supervisor Self Service access attached to your ESR user account.
 - Supervisor Self Service gives access to the required Business Intelligence Dashboard.
- An active smartcard linked to your ESR user account. Supervisor self service is locked down to access only via Smartcard.
- Correct staff sitting beneath you in the supervisor hierarchy. Business Intelligence Dashboards restrict data shown to only include only those who sit within the hierarchy of the user running the report.

Should there be any issues with any of the above please contact <u>workforce@liverpoolft.nhs.uk</u> and the team will provide support.

Running an Annual Leave Entitlement Report from ESR

- 1. Access ESR (using your smartcard)
- 2. Click on the Manager tab.
- 3. On the left hand menu click on 'Reporting' to expand the view, then click on 'Business Intelligence'

VHS lectronic Staff Record	e er		Search Content	C		Cymraeg/Eng	jlish 🕶 Acces	sibility 🎦 💽
Netpoor University Hospitals NH	My ESR	Manager	Recruitment	HR	Payroll	Learning	Applicant	Professional
My Pages								
Dashboard		Team Absence		Team Appraisals		Organisation Chart 👳		
ESR Navigator		Team Absence		Te	Team Appraisals			-
Talent Profile			5 5 5 10		016 - 6016 📒 6016 -	80% 80% - 100		
Organisation Chart		2%	8%		40%	60%		
My Team Personal > Information			0		0%	100%	Laur	ch Organisation Chart
My Team Career > Information		Sickne Refresh - Print - E	ess: 0.74%	Refre	91.6 sh - Print - Export	7%	My Con Convers	tribution ation Portlet
My Team Assignment		Manage	e Absence Manage App		praisals			
Manage Hires		Team Compl	liance	App	oraisals Due			My Contribution Conversation
Reporting ~		Team		Ap	praisals	s Due		LUHIFT Appraisal Framework
Business Intelligence		Complia	nce	Apr	oralisal Due /	Assignments	Appr	aisal Support (My Contribution
Manage Internet Access		409	6 60%	Exp Due Gra	ired within 365 days and Total	1	108	T's new

4. A new tab will open in your web browser window entitled 'ESR Business Intelligence Reporting'.



5. Click on 'Dashboard' in the top blue bar, select 'NHS Standard Dashboards' ensuring the view has been expanded by clicking on the arrow head to the left. Click on 'NHS Absence Dashboard'

ESR Business Intelligence Reporting		Search All	*	Advanced	Help 👻 Sign Out 📿
NHS Introduction to ESR Business Intelligence	Home Catalog	Favorites 🗸	Dashboards - New	👻 🗁 Open 👻 Signed	In As 2875JONE540 -
NHS Electroni	: Staff Record - Business Intelligence		My Dashboard 287 My Dashboard 287 MHS Standard Dashb NHS Absence Analys	oauction to ESR Business inte	()
Welcome to ESR Business Intelligence The addition of ESR Business Intelligence (ESR BI) enhances the range of ESR reporting services. E Greater insight into the utilisation, performance and compliance of the NHS workforce is more easil of National Special Interest Group Chairs providing a broad and consistent range of information whi	SR BI unlocks the potential of the vast am v and conveniently available. A wide range st permitting local customisation.	ount of data s of charts and	NHS Absence Dashb NHS Care Certificate NHS Certifications A NHS Compliance Da NHS Compliance Tre NHS Education and	ioard Dashboard nalysis Dashboard shboard ending Dashboard Learning Dashboard	I

6. When the 'NHS Absence Dashboard' loads you will see a number of tabs at the top of the dashboard. Click on the tab entitled 'Annual Leave Balances'

				Home Catalo	g Favorites 🚽	- Dashb
sation Absence	LT/ST	Days Lost in Period	Individual Absence Record	Annual Leave Balances	Study Leave	Absence

7. You will now be presented with the user defined parameters for the report. To report on annual leave entitlements, taken leave and remaining balances for all the staff who sit within your supervisor hierarchy apply the following parameters:

Organisation Hierarchy :	
Effective Date:	

Must always set as '287 Merged Hierarchy' 31st March YYYY

Once parameters have been set click on the 'Continue' button.

It is possible to report on specific areas or grouped areas by selecting the relevant ESR Organisation(s) or branches of the organisation structure. For guidance on this please contact <u>workforce@liverpoolft.nhs.uk</u>.

Search All 🗸 Advanced Help 🗸 Sign Out 🔿						
ie Catalog Favorites 🗸 Dashboards 🗸 🧏 New 🗸 🗁 Open 🖌 Signed In As 2875JONE540 🗸						
LT/ST Days Lost in Period Individual Absence Record Annual Leave Balances » 🗮 🍞						
Continue						
4						
Units Hours 🕑 Effective Date 09/02/2024 00:00:00 🖄 Only Show Assignments That Have Exceeded Their Entitlement 🗌 Yes						

8. The report will compete and show details based on the parameters which have been set. The data can be exported to Excel, Word, PDF or CSV for review outside of ESR. To export the data scroll to the foot of the table in the middle and click on the 'Export' link. Select the relevant format (Excel is best for most dashboard). The

file will appear as a download in your browser.

Please be mindful when downloading any data from ESR, adhering to relevant Data Protection principles.