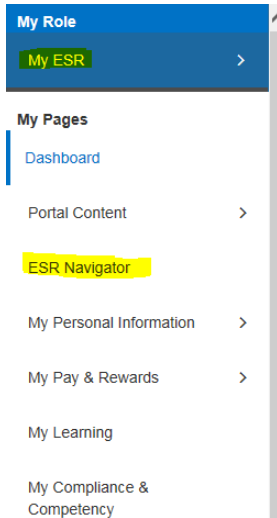
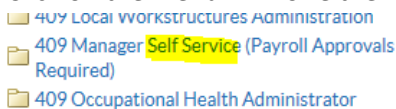


How to Run a Staff List Report Using BI via Self Service

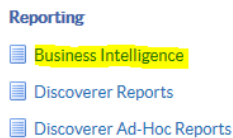
- 1) Log in to ESR using a smart card or upgraded remote access.
- 2) From the Portal Home Page, click on “ESR Navigator” under the “My ESR” menu.



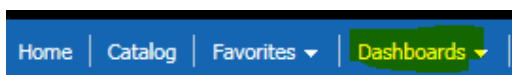
- 3) Click on the menu link for either Supervisor or Manager Self-Service.



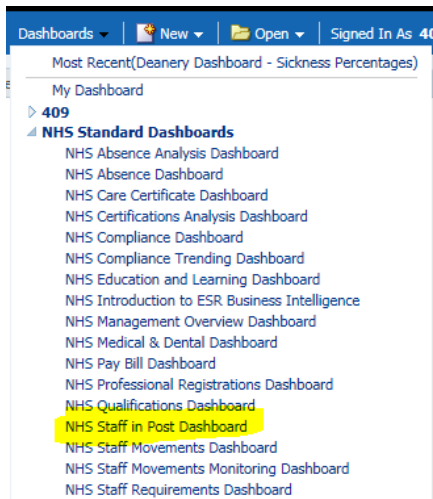
- 4) From the “Reporting” menu option, click on “Business Intelligence”.



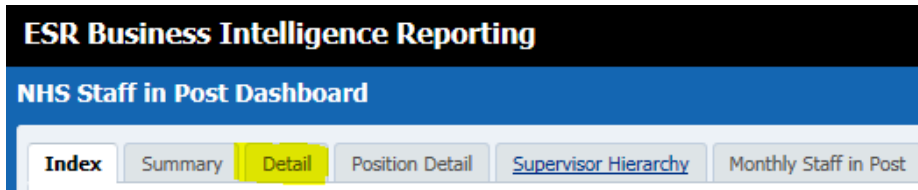
- 5) From the toolbar, click on the “Dashboards” menu to expand the list of available dashboards.



- 6) Expand the list of “NHS Standard Dashboards” and locate the one called “NHS Staff in Post Dashboard”.



- 7) Once the Dashboard loads (Index Page) click on the page for “Detail”.



- 8) You can use the parameters to change the effective date plus a few other details.

NHS Electronic Staff Record - Business Intelligence

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) Employee;Employee Assignment Status NULL;Acting Up;Acti Occupation Code (All Column Values) Job Role(s) (All Column Values)
 Pay Grade(s) (All Column Values) Subjective Code(s) (All Column Values) Job Sharer --Select Primary Assignments Only --Selec Primary Cost Centre Y;N
 Effective Date 05/11/2018 00:00 Show Additional Supervisor(s) Yes

To use the Staff in Post Detail with the Printed Payslip/P60 column, please use the link below. Please note: this version takes longer to run than the version below without the performance issue which is currently being investigated. When a solution is found the original version will be updated.

[Detail including Printed Payslip/P60](#)

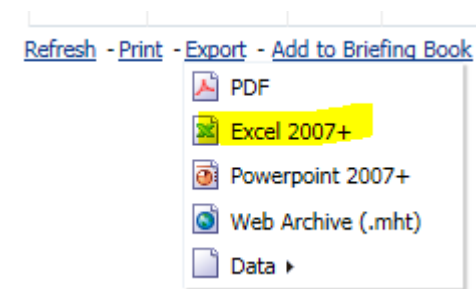


Searching... To cancel, [click here](#).

- 9) The report will run to the screen with various columns which are pre-determined.

Employee Number	Assignment Number	Last Name	Previous Last Name	First Name	Initials	Title	Employee Name	Gender	Age Band	Address Line 1	Address Line 2	Address Line 3	Town or City	County	Postal Code	Telephone Home	Telephone Mobile	Telephone Work
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- 10) Use the “Export” link underneath the report and choose to export to Excel.



- 11) The report is now ready to use as an Excel document.