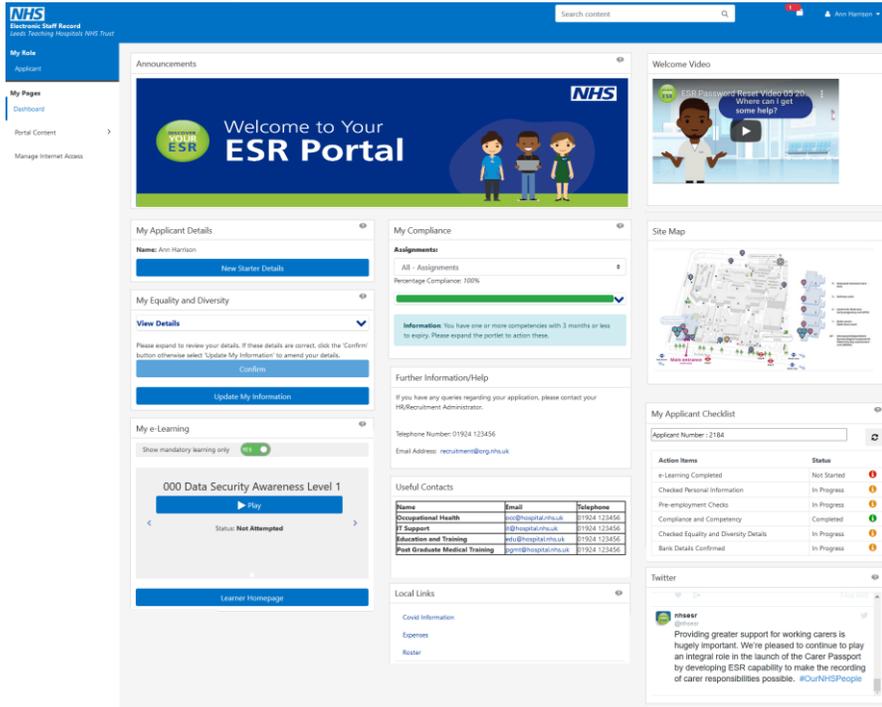


Electronic Staff Record

Customising Dashboards



Organisations can customise the layout of the Portal by the use of Web Content Display Portlets. These can be added to any dashboard and can then be configured to display bespoke content created by organisations in the Portal. The content can include videos, images and text.

Organisations can use this to show videos to staff (introductions to new employees, updates to all staff), provide maps of sites/buildings, create bespoke contact lists and provide hyperlinks for specific dashboards.

Organisations can allow employees to customise any dashboard they have access to by moving, adding or removing certain portlets (with the exception of the My Announcements and My Payslip and P60 portlets). They can give them complete control to customise or restrict this to certain columns of a dashboard. Further information is available [here](#).

Employees can also control how they navigate within ESR by customising their Favourites Portlet. This will give direct access to the required functionality in ESR. Further information is available [here](#).

User Responsibility Profiles (URPs)

To ensure that organisations can create customise dashboards, you will need users with the following URPs.

XXX Content Editor or Content Administrator

- To create and edit content
- Content Administrator can also delete content

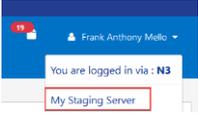
XXX Portal Site Administrator

- Publish content created
- Configure and publish dashboards to display created content

Creating Web Content

Staging Server

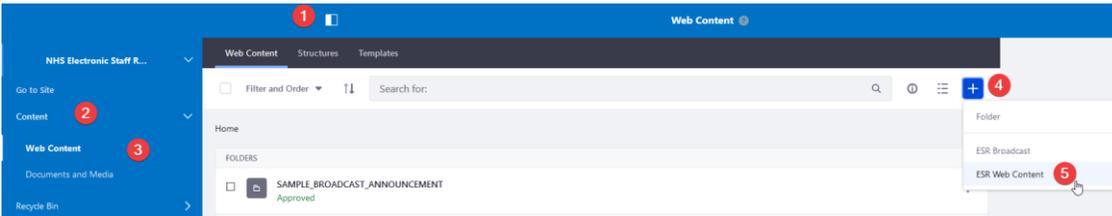
All tasks demonstrated will be carried out on the Staging Server.



Log in as a user who has either the Content Editor or Content Administrator URP.

From the Staging Server

1. Select the **Site Menu**
2. Select **Content**
3. Select **Web Content**
4. Click the **Add** icon
5. Select **ESR Web Content**



1. Enter a **Title**
2. Tick **Autogenerate ID**
3. Enter a **Summary** for the Portlet

CONTENT

Title *

Site Map 1

ID

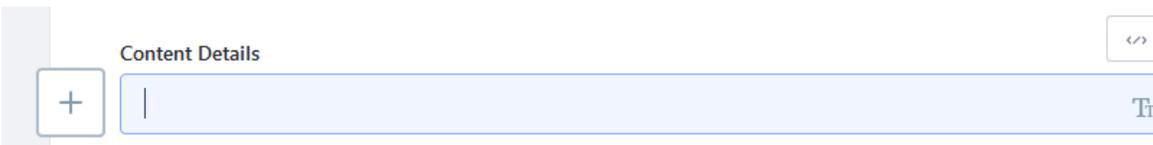
Autogenerate ID 2

Summary

Site map for hospital site 3

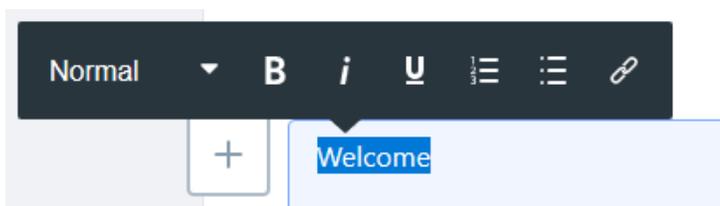
Editing Content Details

The information that will be displayed in the Web Content Portlet is entered in the Content Details section. The user can either type in the text required or add images, videos or tables.



Formatting text

Once text has been entered in the Content Details section, it is possible to apply formatting to it by selecting the text and choosing the required formatting.



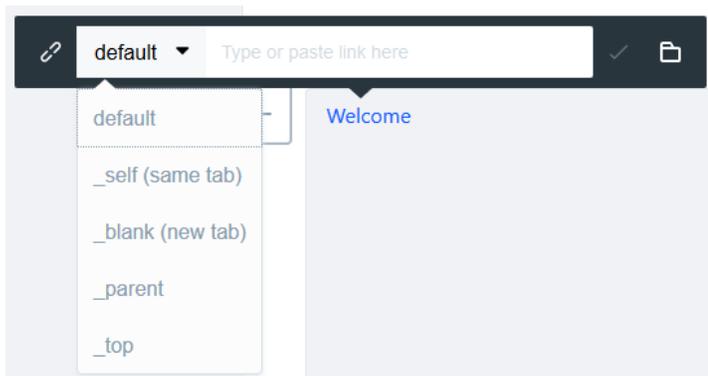
Styles such as Normal, Heading 1, Heading 2 can be applied by clicking the drop down arrow.

Options for bold, italics, underline, ordered and unordered lists can be selected directly from the toolbar.

Hyperlinks

Hyperlinks can be added to text by selecting the link icon.

Selecting `_blank` will mean that the content will open in a new tab.

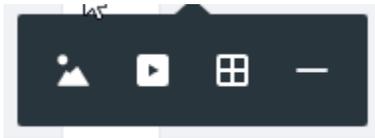


Email addresses

For an email address - add **mailto:** to the hyperlink address e.g. <mailto:support@nhs.uk>, this can be useful if you want to provide organisation contact details in a Portlet.

Videos, Images and Tables

Clicking the  icon will allow you to add images, videos and tables to your content.

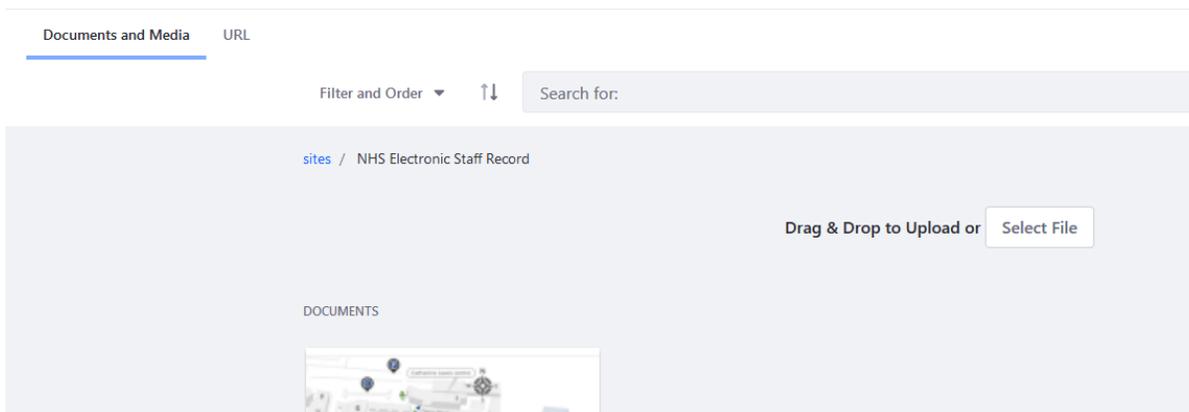


Image

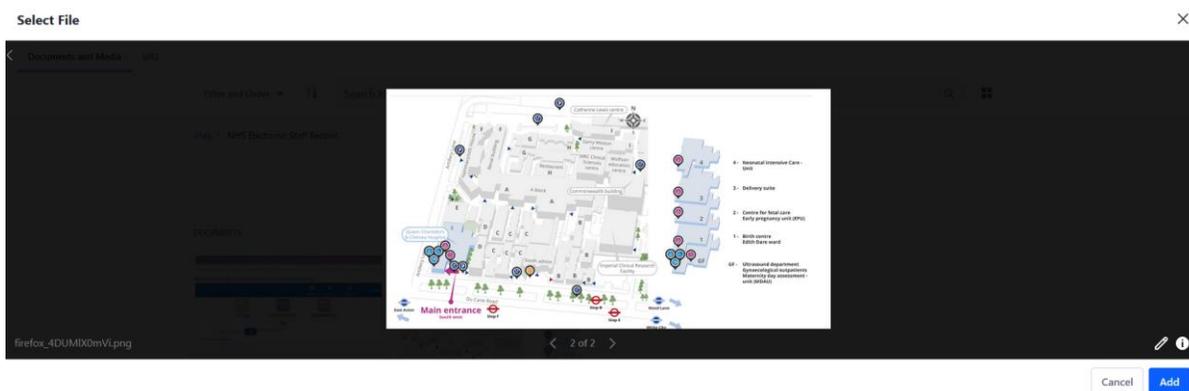
Select the **Add Image** icon 

Select the Image (either stored locally or already stored on the Portal)

Select File



Click Add



Once image has been added, selecting it will then give additional options such as alignment, adding a hyperlink and adding alternative text for the image.

It is recommended that alternative text is added by clicking Alt and entering a description of the image.



Video

Select the **Add Video** icon  and enter the URL where the video is located.

Content Details

Write your content here...

<https://www.youtube.com/watch?v=EsekRwoa25k> ✓

NO

Tables

Select the **Add Table** icon  and enter the URL where the video is located.

Rows 3 |  Cols 3 |  ✓

When editing a table there are options to:

- Format the first row, first column or both as headers **Headers: None**
- Add rows 
- Add columns 
- Add/merge cells 

Content Details

Headers: None     

Publish

- Once the content has been created, click **Publish**.

This means that the Portal Site Administrator can publish the content to live, it does not make the content live to users.

As content will be displayed in a Web Content Portlet - it should not be necessary to set an Expiration Date.

SCHEDULE



Display Date

27/02/2019

10:11

Expiration Date

02/09/2021

10:37

Never Expire

Review Date

08/06/2021

10:37

Never Review

Publish

Save as Draft

Cancel

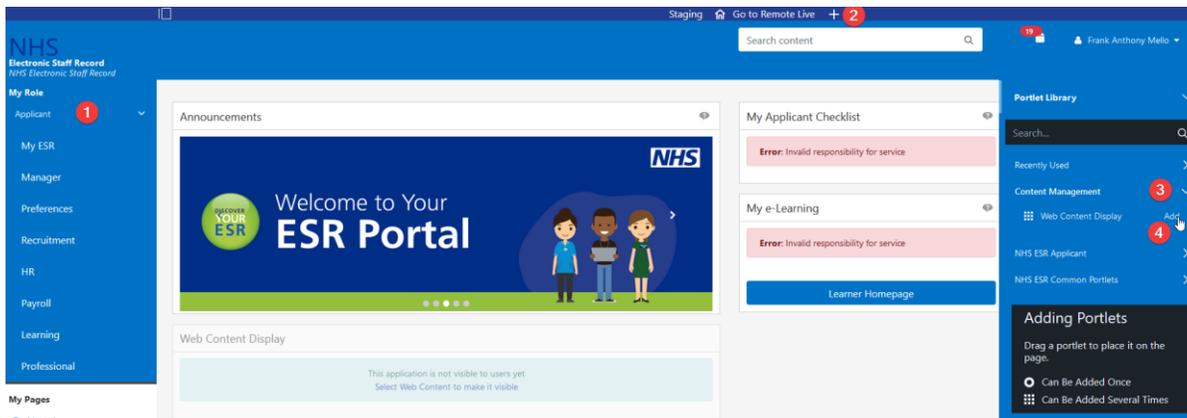
Adding Web Content to a Dashboard

The content is now ready to be added to a Dashboard.

Log in as a user who has the Portal Site Administrator URP.

From the Staging Server

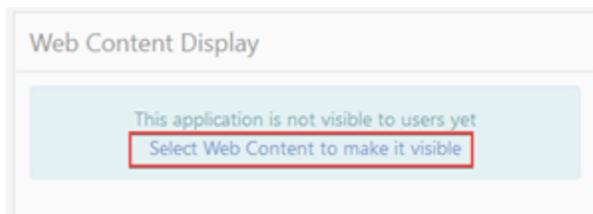
1. Select the Dashboard which you are customising
2. Click the Add icon
3. Select Content Management from the Portlet Library
4. Click Add next to Web Content Display



You can add as many Web Content Display Portlets as you wish to a Dashboard and move them to the required position.

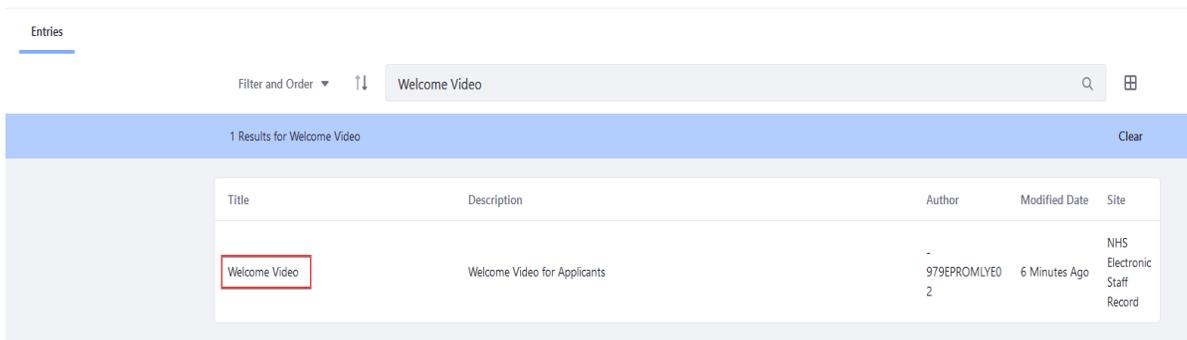
Configuring the Portlet

Click Select Web Content to choose the required web content

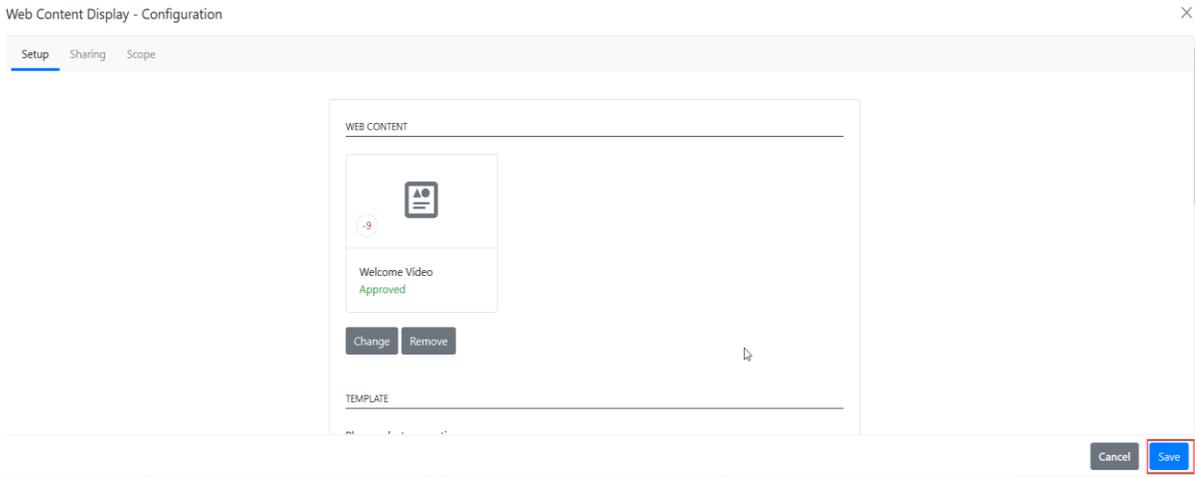


- Select the Content, you can browse the content or enter a search term to find this

Select Web Content



Click Save



Repeat for each of the Web Content Display portlets.

Publish to Live

Once the Dashboard has been configured, the changes can be Published to Live.

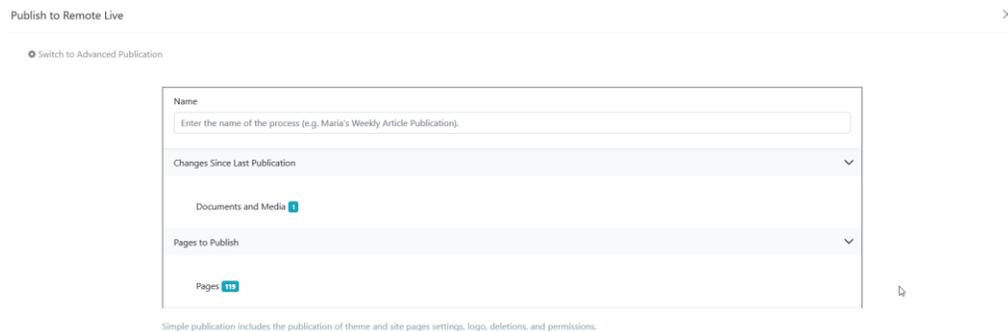
1. Click **Staging**
2. Click **Publish to Live**



Publish to Live 2

i NHS Electronic Staff Record Is Staged. You are viewing the staged version of *NHS Electronic Staff Record*. You can make changes here and publish them to Live afterwards to make them public.

- Click **Publish to Live**



Simple publication includes the publication of theme and site pages settings, logo, deletions, and permissions.

The changes will now be visible in the live environment.