

# ESR BI for Learning Administration



September 2019  
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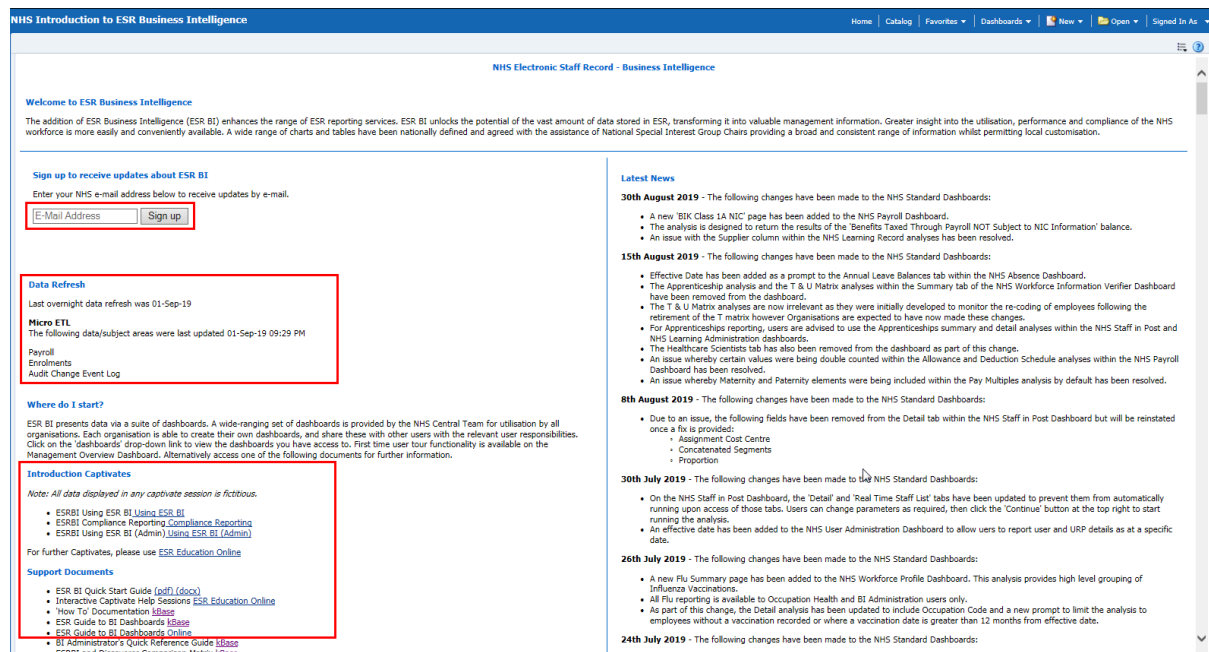
## Introduction to ESR BI Dashboard

Allows users to sign up to an email which will inform them when updates are made to ESR BI reports.

Contains key information on Data Refresh and Micro ETLs (Extract Transform Load)

- The Micro ETLs update data 3 times per day (after the daily refresh at approximately 07:00, 11:00 and 14:30.
- Enrolment data (new enrolments and updates to enrolments) is included in the Micro ETLs which means that any reports that contain enrolment data e.g. Sign-in sheet are updated three times per day.

Links to tutorials and further resources



**NHS Introduction to ESR Business Intelligence**

Welcome to ESR Business Intelligence

The addition of ESR Business Intelligence (ESR BI) enhances the range of ESR reporting services. ESR BI unlocks the potential of the vast amount of data stored in ESR, transforming it into valuable management information. Greater insight into the utilisation, performance and compliance of the NHS workforce is more easily and conveniently available. A wide range of charts and tables have been nationally defined and agreed with the assistance of National Specialist Interest Group Chairs providing a broad and consistent range of information whilst permitting local customisation.

**Sign up to receive updates about ESR BI**

Enter your NHS e-mail address below to receive updates by e-mail.

**Data Refresh**

Last overnight data refresh was 01-Sep-19

**Micro ETL**

The following data/subject areas were last updated 01-Sep-19 09:29 PM

Payroll  
Enrolments  
Audit Change Event Log

**Where do I start?**

ESR BI presents data via a suite of dashboards. A wide-ranging set of dashboards is provided by the NHS Central Team for utilisation by all organisations. Each organisation is able to create their own dashboards, and share these with other users with the relevant user responsibilities. Click on the 'dashboards' drop-down link to view the dashboards you have access to. First time user tour functionality is available on the Management Overview Dashboard. Alternatively access one of the following documents for further information.

**Introduction Captivates**

Note: All data displayed in any captive session is fictitious.

- ESR BI Using ESR BI Using ESR BI
- ESR BI Compliance Reporting/Compliance Reporting
- ESR BI Using ESR BI (Admin) Using ESR BI (Admin)

For further Captivates, please use [ESR Education Online](#)

**Support Documents**

- ESR BI Quick Start Guide (.pdf) (.docx)
- Interactive Captivate Help Sessions [ESR Education Online](#)
- 'How To' Documentation [ESR](#)
- ESR Guide to BI Dashboards [ESR](#)
- ESR Guide to BI Dashboards [Online](#)
- BI Administrator's Quick Reference Guide [ESR](#)
- ESR BI and Personnel Information Matrix [ESR](#)

**Latest News**

**30th August 2019** - The following changes have been made to the NHS Standard Dashboards:

- A new 'BIC Class 1A NIC' page has been added to the NHS Payroll Dashboard.
- The analysis is designed to return the results of the 'Benefits Taxed Through Payroll NOT Subject to NIC Information' balance.
- An issue with the Supplier column within the NHS Learning Record analyses has been resolved.

**15th August 2019** - The following changes have been made to the NHS Standard Dashboards:

- Effective Date has been added as a prompt to the Annual Leave Balances tab within the NHS Absence Dashboard.
- The Apprenticeship analysis and the T & U Matrix analyses within the Summary tab of the NHS Workforce Information Verifier Dashboard have been removed from the dashboard.
- The T & U Matrix analyses are now irrelevant as they were initially developed to monitor the re-coding of employees following the retirement of the T matrix however Organisations are expected to have now made these changes.
- For Apprenticeships reporting, users are advised to use the Apprenticeships summary and detail analyses within the NHS Staff in Post and NHS Learning Administration dashboards.
- The Healthcare Scientists tab has also been removed from the dashboard as part of this change.
- An issue whereby certain values were being double counted within the Allowance and Deduction Schedule analyses within the NHS Payroll Dashboard has been resolved.
- An issue whereby Maternity and Paternity elements were being included within the Pay Multiples analysis by default has been resolved.

**8th August 2019** - The following changes have been made to the NHS Standard Dashboards:

- Due to an issue, the following fields have been removed from the Detail tab within the NHS Staff in Post Dashboard but will be reinstated once a fix is provided:
  - Assignment Cost Centre
  - Concatenated Segments
  - Proportion

**30th July 2019** - The following changes have been made to the NHS Standard Dashboards:

- On the NHS Staff in Post Dashboard, the 'Detail' and 'Real Time Staff List' tabs have been updated to prevent them from automatically running upon access of those tabs. Users can change parameters as required, then click the 'Continue' button at the top right to start running the analysis.
- An effective date has been added to the NHS User Administration Dashboard to allow users to report user and URP details as at a specific date.

**26th July 2019** - The following changes have been made to the NHS Standard Dashboards:

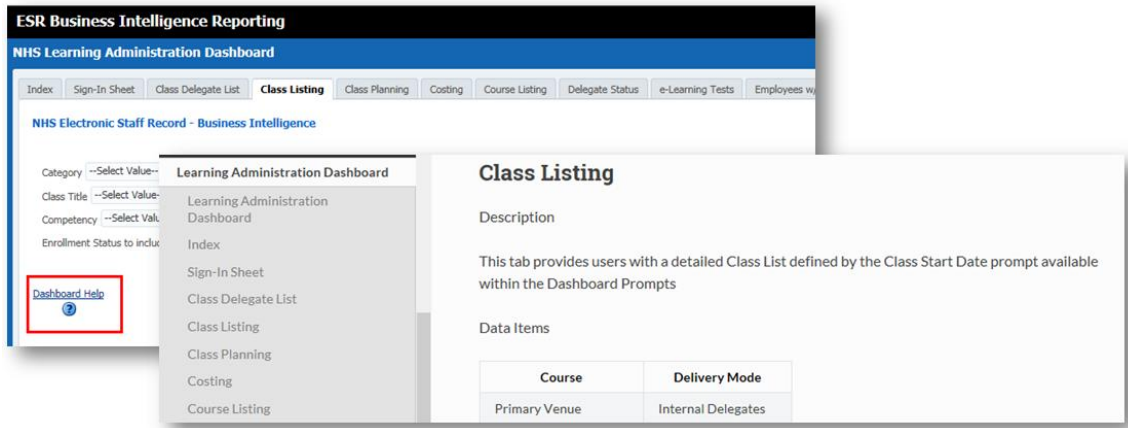
- A new Flu Summary page has been added to the NHS Workforce Profile Dashboard. This analysis provides high level grouping of Influenza Vaccinations.
- All Flu reporting is available to Occupation Health and BI Administration users only.
- As part of this change, the Detail analysis has been updated to include Occupation Code and a new prompt to limit the analysis to employees without a vaccination recorded or where a vaccination date is greater than 12 months from effective date.

**24th July 2019** - The following changes have been made to the NHS Standard Dashboards:

# ESR BI for Learning Administration

## Dashboard Help

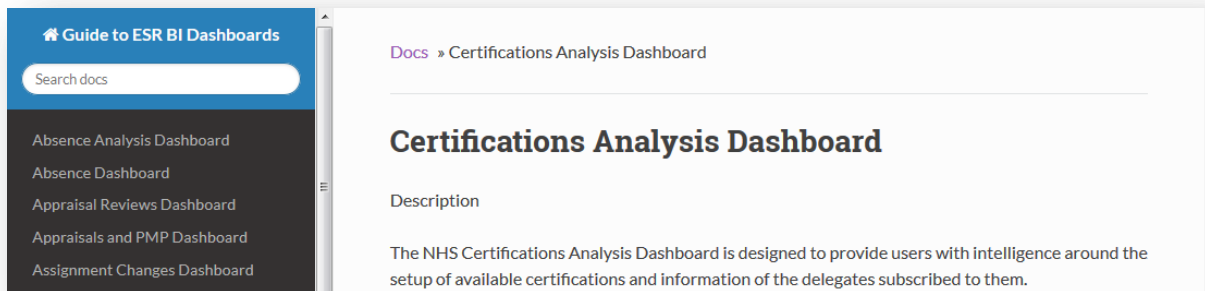
Clicking Dashboard Help link will provide further details on the analysis



## Guide to ESR Dashboards

<http://www.esrsupport.co.uk/ESRBI/guide/v2/>

Provides descriptions of Dashboards and Analyses, including the URPs that can use the Dashboard, data items available and prompts.



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## Learning Administration Dashboard

This dashboard is designed to provide the user with intelligence around Learning Administration.

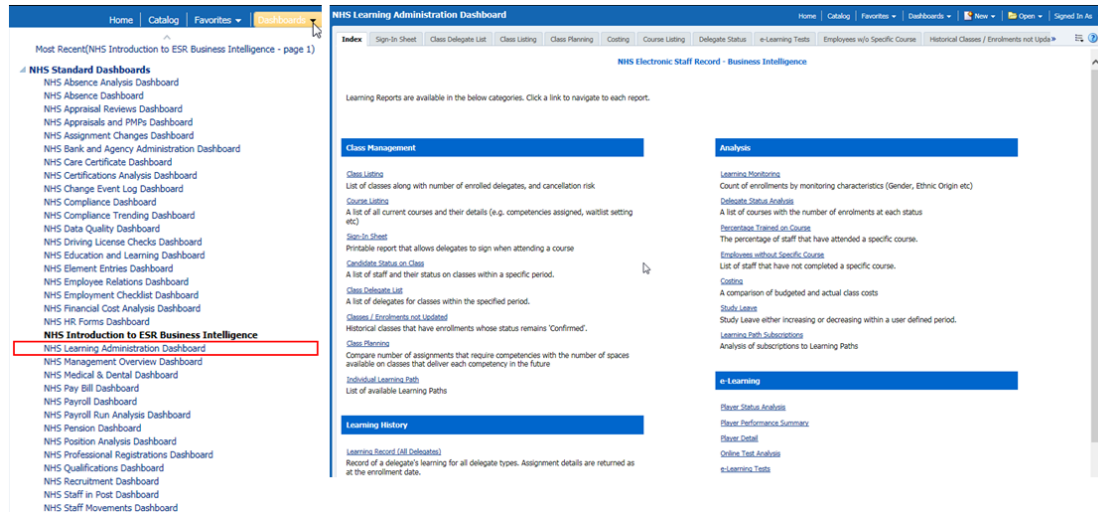
Dashboard is available to the following URPs:

- XXX BI Administration
- XXX Learning Administration
- XXX Class Administration
- XXX Learning Instructor (only Delegate Status, Class Listing and Sign-In Sheet analyses are available to this URP)

Learning Instructor and Class Administration URPs only see classes (and delegates) with whom they are associated.

**Navigation:** Dashboards - NHS Learning Administration Dashboard

Use the Index page to navigate to the required analysis.



The screenshot displays the NHS Learning Administration Dashboard interface. The left sidebar contains a list of 'NHS Standard Dashboards' and 'NHS Introduction to ESR Business Intelligence' dashboards, with 'NHS Learning Administration Dashboard' highlighted. The main content area is titled 'NHS Learning Administration Dashboard' and 'NHS Electronic Staff Record - Business Intelligence'. It features several analysis categories:

- Class Management:** Includes Class Listing, Course Listing, Sign-In Sheet, Candidate Status on Class, Class Delegates List, Classes / Enrolments not Updated, and Class Planning.
- Analysis:** Includes Learning Monitoring, Delegate Status Analysis, Enrolments Trained on Course, Employees without Specific Course, Costs, Staff Leave, Learning Path Subscriptions, and e-Learning.
- Learning History:** Includes Learning Record (All Delegates).

Below are some examples of analysis available in the Dashboard, full details available [here](#).

# ESR BI for Learning Administration

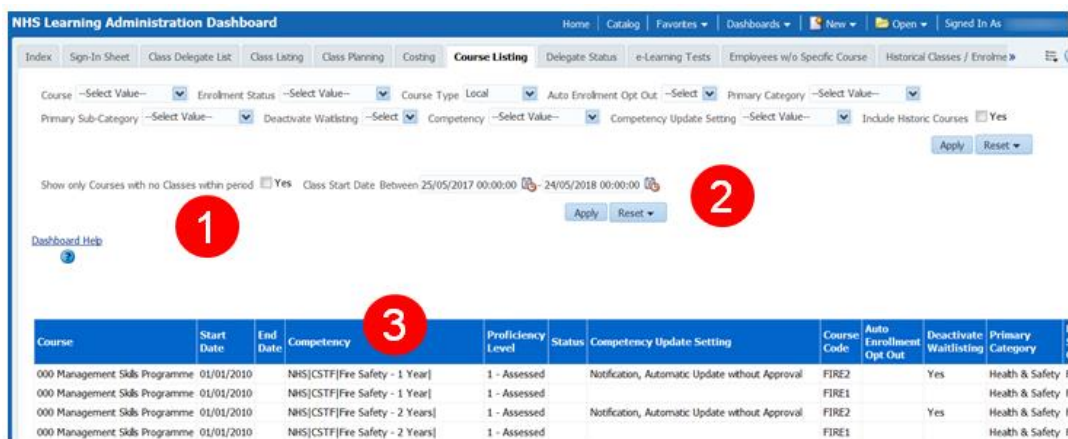
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## Course Listing

The analysis provides learning administrators with a list of all current courses and their details (e.g. competencies assigned, waitlist setting etc).

To identify Courses which can be end dated:

1. Show only Courses with no Classes within period
2. Choose Date Range
3. Identify Courses which need closing



**1** Show only Courses with no Classes within period  Yes

**2** Class Start Date Between 25/05/2017 00:00:00 - 24/05/2018 00:00:00

Course	Start Date	End Date	Competency	Proficiency Level	Status	Competency Update Setting	Course Code	Auto Enrollment Opt Out	Deactivate Waitlisting	Primary Category
000 Management Skills Programme	01/01/2010		NHS[CSTF]Fire Safety - 1 Year]	1 - Assessed		Notification, Automatic Update without Approval	FIRE2		Yes	Health & Safety I
000 Management Skills Programme	01/01/2010		NHS[CSTF]Fire Safety - 1 Year]	1 - Assessed			FIRE1			Health & Safety I
000 Management Skills Programme	01/01/2010		NHS[CSTF]Fire Safety - 2 Years]	1 - Assessed		Notification, Automatic Update without Approval	FIRE2		Yes	Health & Safety I
000 Management Skills Programme	01/01/2010		NHS[CSTF]Fire Safety - 2 Years]	1 - Assessed			FIRE1			Health & Safety I

**3** Competency

# ESR BI for Learning Administration

## Class Listing

This analysis provides users with a detailed Class List defined by the Class Start Date prompt available within the Dashboard Prompts

Cancellation Risk colour is calculated as below:

- Red Delegates = 0 or < Minimum Delegates
- Amber No. Delegates Between Minimum and 75% of Maximum
- Green Between 75% of Maximum and Maximum
- None Other (e.g. No. Delegates = Maximum)

The screenshot shows the NHS Learning Administration Dashboard with the 'Class Listing' tab selected. The dashboard includes various filters for Category, Sub-Category, Course, Delivery Mode, Class Title, Event Status, Class Start Date, Competency, and Enrollment Status. Below the filters is a table with columns: Course, Delivery Mode, Title, Start Date, Start Time, End Time, Primary Venue, Maximum Attendees, Minimum Attendees, Internal Delegates, Customers, All Delegates Count, and Places Remaining. A detailed view of the table shows columns for All Delegates Count, Places Remaining, Cancellation Reason, Class Cancellation Risk (with color coding), Event Status, Category, Sub-Category, Enable Learner Access, Last Updated By, and Last Updated Date. The 'Class Cancellation Risk' column uses colors: Red for 0 or less than minimum, Amber for between minimum and 75% of maximum, and Green for between 75% of maximum and maximum.

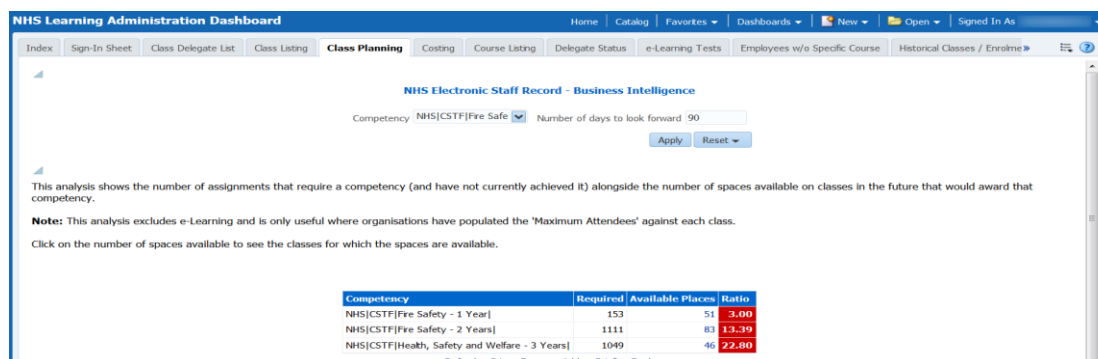
Course	Delivery Mode	Title	Start Date	Start Time	End Time	Primary Venue	Maximum Attendees	Minimum Attendees	Internal Delegates	Customers	All Delegates Count	Places Remaining	Cancellation Reason	Class Cancellation Risk	Event Status	Category	Sub-Category	Enable Learner Access	Last Updated By	Last Updated Date
000 Management Skills Programme	Classroom	000 How to Char a Meeting	02/10/2017	09:30	12:30			15		12	0	12			Full	Personal Development		No		23/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting		13:00	17:00			6		3	0	3			Normal	Personal Development		No		11/07/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting		13:30	16:00			12		8	0	8			Normal	Personal Development		No		22/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		21/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		27/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		29/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		28/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		20/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Full	Personal Development		No		21/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		14/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		14/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019
000 Management Skills Programme	Classroom	000 How to Char a Meeting													Normal	Personal Development		No		15/08/2019

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## Class Planning

This analysis shows the number of assignments that require a competency (and have not currently achieved it) alongside the number of spaces available on classes in the future that would award that competency.



NHS Learning Administration Dashboard

NHS Electronic Staff Record - Business Intelligence

Competency: NHS[CSTF]Fire Safe | Number of days to look forward: 90

Apply | Reset

This analysis shows the number of assignments that require a competency (and have not currently achieved it) alongside the number of spaces available on classes in the future that would award that competency.

**Note:** This analysis excludes e-Learning and is only useful where organisations have populated the 'Maximum Attendees' against each class.

Click on the number of spaces available to see the classes for which the spaces are available.

Competency	Required	Available Places	Ratio
NHS[CSTF]Fire Safety - 1 Year	153	51	2.00
NHS[CSTF]Fire Safety - 2 Years	1111	83	13.39
NHS[CSTF]Health, Safety and Welfare - 3 Years	1049	46	22.80

Refresh | Print | Export | Add to Briefing Book

When clicking on the available places total, users are navigated to the Supply of Competencies Detail analysis which shows the available classes and spaces which will deliver the competency.

Course	Delivery Mode	Title	Start Date	Start Time	Max Attendees	Enrollments	Places Remaining
	Classroom		14/11/2019	09:00	30	4	26
	Classroom		12/09/2019	09:00	30	25	5
	Classroom		12/12/2019	09:00	30	2	28
	Classroom		17/10/2019	09:00	30	5	25
	Classroom		19/09/2019	13:30	20	3	17
	Classroom		20/11/2019	10:00	20	1	19
	Classroom		14/10/2019	14:00		1	0

Note: This analysis excludes e-Learning and is only useful where organisations have populated the 'Maximum Attendees' against each class.

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## Historical Classes/Enrolments not Updated

This analysis lists classes and the number of enrolments against each that have not been updated to a correct status post-event. By clicking on the class name, the employee detail is shown in the adjacent analysis.

The screenshot shows the 'Historical Classes / Enrolments not Updated' analysis in the NHS Learning Administration Dashboard. The interface includes a navigation bar with options like 'Class Delegate List', 'Class Listing', and 'Class Planning'. The main content area features a filter section with dropdown menus for 'Course', 'Class Status', and 'Enrolment Status', and a date range for 'Class End Date'. Below the filters is a table of class data and a detailed view for a specific employee.

Title	Start Date	End Date	Event Status	Enrolments
000 How to Chair a Meeting	01/07/2014	31/07/2017	Normal	436
000 How to Chair a Meeting	30/07/2014	31/07/2017	Normal	1
000 How to Chair a Meeting	01/08/2014	01/08/2017	Normal	460
000 How to Chair a Meeting	01/09/2014	01/09/2017	Normal	482
000 How to Chair a Meeting	01/11/2016	01/07/2017	Normal	1163
000 How to Chair a Meeting	07/07/2017	07/07/2017	Normal	9
000 How to Chair a Meeting	10/07/2017	10/07/2017	Normal	11
000 How to Chair a Meeting	12/07/2017	12/07/2017	Full	11
000 How to Chair a Meeting	12/07/2017	12/07/2017	Normal	1

Employee Number	Delegate Type	Delegate Name	Enrolment Status
00000000	Employee	Blogs, Mr. Joe	Confirmed

Below the employee detail table are links for [Refresh](#), [Print](#), [Export](#), and [Add to Briefing Book](#).



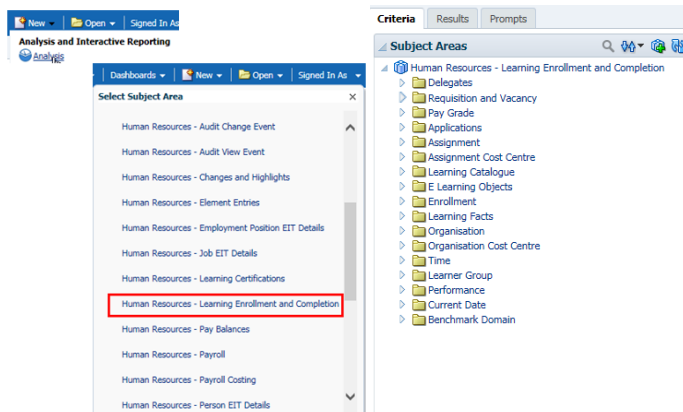


# ESR BI for Learning Administration

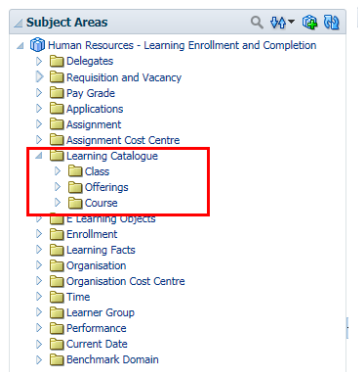
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## Learning Enrollment and Completion Subject Area

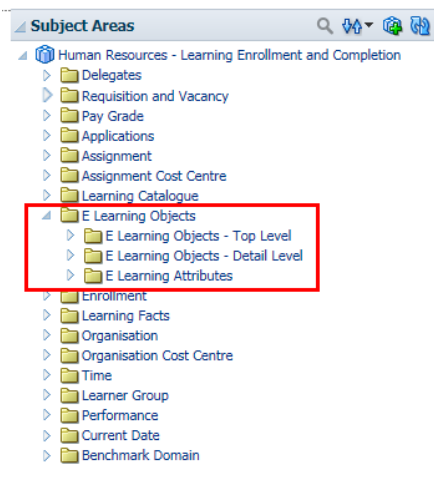
New - Analysis - Human Resources - Learning Enrollment and Completion



Learning Catalogue - Data items related to Courses, Offerings and Classes.



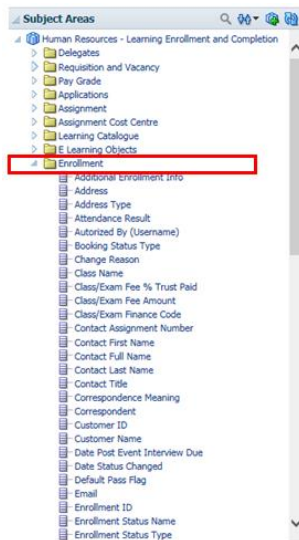
E Learning Objects - Data items related to Learning Objects



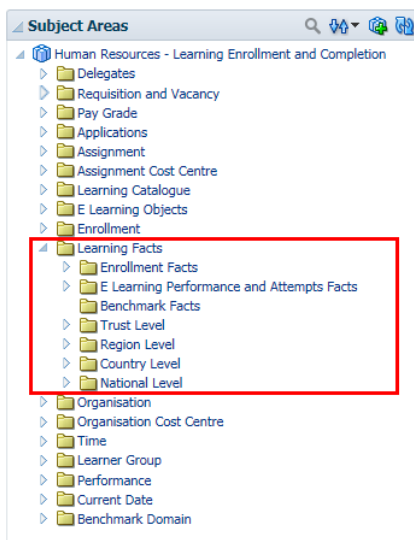
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## Enrollment - Data items related to enrolments



Learning Facts - Pre-calculated measures which reduce the need for users to enter custom formulae when reporting a range of standard measures



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## Certification Analysis Dashboard

The NHS Certifications Analysis Dashboard is designed to provide users with intelligence around the setup of available certifications and information of the delegates subscribed to them.

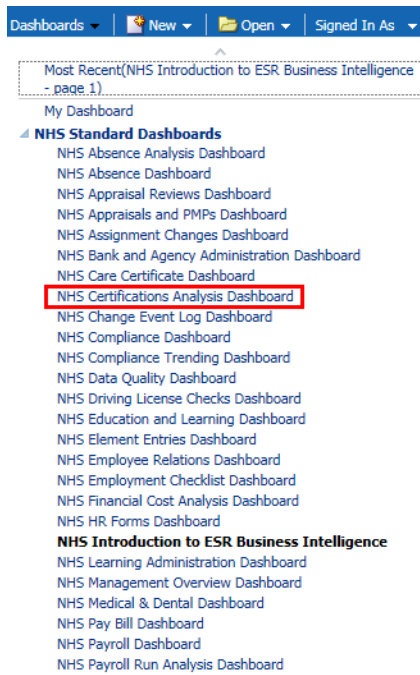
Dashboard is available to the following URPs:

- XXX BI Administration
- XXX Learning Administration
- XXX Administrator Self Service (Payroll Approvals Not Required)
- XXX Administrator Self Service (Payroll Approvals Required)
- XXX Manager Self Service (Payroll Approvals Not Required)
- XXX Manager Self Service (Payroll Approvals Required)
- XXX Supervisor Self Service
- XXX Supervisor Self Service (Limited Access)

Note, Self Service URPs do not have access to Learning Certification Details.

**Navigation:** Dashboards - NHS Learning Administration Dashboard

Full details available [here](#).



The screenshot shows the top navigation bar of the NHS Learning Administration Dashboard. It includes a 'Dashboards' dropdown menu, a 'New' button with a plus icon, an 'Open' button with a folder icon, and a 'Signed In As' dropdown menu. Below this is a search bar containing the text 'Most Recent(NHS Introduction to ESR Business Intelligence - page 1)'. The main navigation area is titled 'My Dashboard' and contains a list of 'NHS Standard Dashboards'. The 'NHS Certifications Analysis Dashboard' is highlighted with a red box. Other dashboards listed include NHS Absence Analysis, NHS Appraisal Reviews, NHS Compliance, NHS Data Quality, NHS Driving License Checks, NHS Education and Learning, NHS Element Entries, NHS Employee Relations, NHS Employment Checklist, NHS Financial Cost Analysis, NHS HR Forms, NHS Learning Administration, NHS Management Overview, NHS Medical & Dental, NHS Pay Bill, NHS Payroll, and NHS Payroll Run Analysis.

# ESR BI for Learning Administration

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## Learning Certification Details

This analysis is designed to provide the details of each certification that is available within the Learning Catalogue.

**NHS Certifications Analysis Dashboard** | Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Delegate Status on Certification | Course Compliance | Certification History | **Certification Details**

NHS Electronic Staff Record - Business Intelligence

Effective Date: 06/10/2017 | Certification Name: (All Column Values) | Course: (All Column Values) | Certification Competency Name: (All Column Values) | Certification Competency Level Attached: (All Column Values) | Created By: (All Column Values)

Apply | Reset

Certification Name	Start Date	End Date	Target Days	Renewal Period (Days)	Validity Period	Validity Period Starts From	Course Name	Certification Competency Name	Certification Competency Level Attached	Created By
000 NHS ESR - Raising Awareness	01/01/2015	01/01/2018		1096 Day(s)	1096 Day(s)	From certification due date	000 ESR Awareness - Assessment	NHS ESR 000 ESR Awareness - Assessment		000 Blogs01 Blogs, Mr. Joe
000 NHS ESR - Raising Awareness	01/01/2015		1095		1095 Day(s)	From learner completion date	000 ESR Awareness - Assessment	NHS ESR 000 ESR Awareness - Assessment		000 Blogs01 Blogs, Mr. Joe
000 NHS ESR - Raising Awareness	01/06/2016		5		1095 Day(s)	From learner completion date	000 ESR Awareness - Assessment	NHS ESR 000 ESR Awareness - Assessment	1 - Assessed	000 Blogs01 Blogs, Mr. Joe
000 NHS ESR - Raising Awareness	20/07/2016		30		1095 Day(s)	From learner completion date	000 ESR Awareness - Assessment	NHS ESR 000 ESR Awareness - Assessment		000 Blogs01 Blogs, Mr. Joe
000 NHS ESR - Raising Awareness	20/08/2016		30		1095 Day(s)	From learner completion date	000 ESR Awareness - Assessment	NHS ESR 000 ESR Awareness - Assessment		000 Blogs01 Blogs, Mr. Joe

## Delegate Status on Certification

This analysis shows the current status of each employee/assignment on certifications they are subscribed to. Certifications are returned based on the period start and end date.

**NHS Certifications Analysis Dashboard** | Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Delegate Status on Certification | Course Compliance | Certification History | Certification Details

NHS Electronic Staff Record - Business Intelligence

Organisation Name: (All Column Values) | Employee Number: (All Column Values) | Delegate Name is LIKE (pattern match) | Role: (All Column Values) | Staff Group: (All Column Values) | Assignment Category: (All Column Values) | Person Type: (All Column Values) | Occupation Code: (All Column Values) | Assignment Status: NULL;Acting Up;Actn | Effective Date: 06/10/2017 | Certification Name: (All Column Values) | Course: (All Column Values)

Apply | Reset

Delegate Name	Assignment	Employee Number	Position Title	Job Role	Organisation	Certification Name	Certification Progress	Subscription Status	Enrolment Date	Certified Date	Target Date	Certification Period Start Date	Certification Period End Date	Renewal Period	Expiry Date
Blogs, Mr. Joe	00000000	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	Active	Certified	28/09/2017	05/10/2017	09/10/2017	04/10/2017	09/10/2017		05/10/2018
Blogs, Mr. Joe	00000000	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	Completed	Certified	07/06/2017	05/10/2017	10/10/2017	05/10/2017	10/10/2017		05/10/2018

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## Course Compliance

This analysis is designed to show the status of each person against each course of each certification they are subscribed to. This is similar to the Delegate Status analysis but includes component details (including course status).

**NHS Certifications Analysis Dashboard**

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Delegate Status on Certification | **Course Compliance** | Certification History | Certification Details

NHS Electronic Staff Record - Business Intelligence

Organisation Name (All Column Values) Employee Number (All Column Values) Delegate Name is LIKE (pattern match) Role (All Column Values)

Staff Group (All Column Values) Assignment Category (All Column Values) Person Type (All Column Values) Occupation Code (All Column Values) Assignment Status NULL;Acting Up;Acti

Effective Date 06/10/2017 Certification Name (All Column Values) Course (All Column Values)

Apply Reset

Delegate Name	Employee Number	Position Title	Job Role	Organisation	Certification Name	Course Name	Certification Progress	Course Status	Performance Status	Certified Date	Target Date	Certification Period Start Date	Certification Period End Date	Renewal Period (Days)	Renewal Due
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Active	Active	Incomplete	24/08/2017	07/10/2017	02/10/2017	07/10/2017		07/10/2017
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Canceled	Active	Passed	04/10/2017	09/10/2017	04/10/2017	09/10/2017		04/10/2017
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Canceled	Completed	Completed	04/10/2017	09/10/2017	04/10/2017	09/10/2017		04/10/2017
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Completed	Completed	Completed	18/07/2017	16/10/2017	18/07/2017	16/10/2017		

## Certification History

Analysis to show the history of each person on each component of each certification they are subscribed to. The report will show the details of each time they played the course throughout each renewal/certification period.

**NHS Certifications Analysis Dashboard**

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As

Delegate Status on Certification | Course Compliance | **Certification History** | Certification Details

NHS Electronic Staff Record - Business Intelligence

Organisation Name (All Column Values) Employee Number (All Column Values) Delegate Name is LIKE (pattern match) Role (All Column Values)

Staff Group (All Column Values) Assignment Category (All Column Values) Person Type (All Column Values) Occupation Code (All Column Values) Assignment Status NULL;Acting Up;Acti

Enrolment Date Between 06/10/2016 12:00:00 - 06/10/2017 12:00:00 Certification Name (All Column Values) Course (All Column Values)

Apply Reset

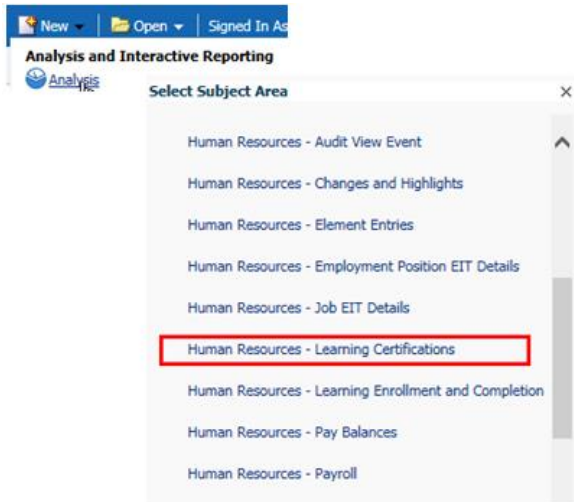
Delegate Name	Employee Number	Position Title	Job Role	Organisation	Certification Name	Course Name	Certification Progress	Component Status	Performance Status	Enrolment Date	Target Date	Certified Date	Certification Period Start Date	Certification Period End Date	Renewal Period	Re
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Canceled	Active		27/04/2017	22/04/2017	27/04/2017	17/04/2017	22/04/2017		
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Completed	Completed	Completed	17/04/2017	17/05/2017	27/04/2017	17/04/2017	17/05/2017		27/0
Blogs, Mr. Joe	00000000	Management	Senior Manager	000 ESR Organisation	000 ESR Awareness Level 1 - Certification	000 ESR Awareness	Completed	Completed	Completed	27/04/2017	27/05/2017	27/04/2017	27/04/2017	27/05/2017		27/0

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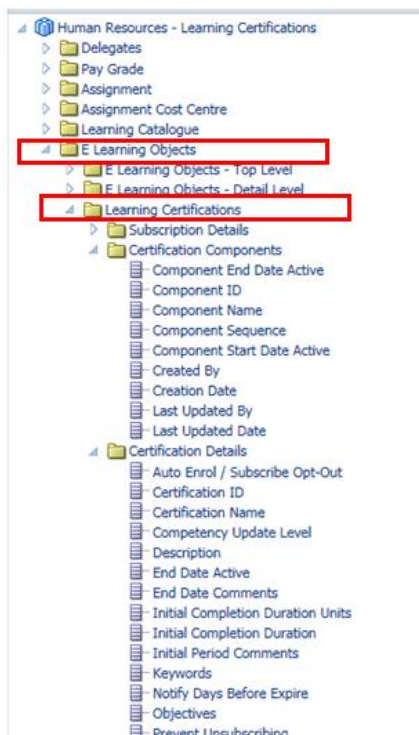
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## Human Resources - Learning Certifications Subject Area

New - Analysis - Human Resources - Learning Certifications



E Learning Objects folder contains the Learning Certifications folder with details related to Learning Certification Details, associated courses and subscriptions.



# ESR BI for Learning Administration

## Learning Dashboard Portlets

<p><b>DNA over the previous month</b></p> <p>Group by: Staff Group View as: Graph</p> <p>DNA Rate %</p> <p>Staff Group</p>	<p><b>Learning Compliance</b></p> <p>View: Gauge</p> <p>0% - 60% 60% - 80% 80% - 100%</p> <p>78.32%</p>	<p><b>Bottom 10 Orgs by Compliance</b></p> <p>Group by: Organisation</p> <table border="1"> <thead> <tr> <th>Organisation</th> <th>Compliance %</th> </tr> </thead> <tbody> <tr><td>000 NHS ESR Organisation</td><td>0.00</td></tr> <tr><td>000 NHS ESR Organisation</td><td>0.00</td></tr> <tr><td>000 NHS ESR Organisation</td><td>6.25</td></tr> <tr><td>000 NHS ESR Organisation</td><td>6.82</td></tr> <tr><td>000 NHS ESR Organisation</td><td>9.57</td></tr> <tr><td>000 NHS ESR Organisation</td><td>10.00</td></tr> <tr><td>000 NHS ESR Organisation</td><td>10.26</td></tr> <tr><td>000 NHS ESR Organisation</td><td>11.36</td></tr> <tr><td>000 NHS ESR Organisation</td><td>12.50</td></tr> <tr><td>000 NHS ESR Organisation</td><td>12.50</td></tr> <tr><td>000 NHS ESR Organisation</td><td>12.50</td></tr> </tbody> </table>	Organisation	Compliance %	000 NHS ESR Organisation	0.00	000 NHS ESR Organisation	0.00	000 NHS ESR Organisation	6.25	000 NHS ESR Organisation	6.82	000 NHS ESR Organisation	9.57	000 NHS ESR Organisation	10.00	000 NHS ESR Organisation	10.26	000 NHS ESR Organisation	11.36	000 NHS ESR Organisation	12.50	000 NHS ESR Organisation	12.50	000 NHS ESR Organisation	12.50
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<p><b>Group by:</b> Staff Group / Week</p> <p><b>View:</b> Graph (Default) / Table</p> <p><b>Navigate to:</b> NHS Compliance Dashboard&gt;Did Not Attend Details tab</p> <p><b>Course Type:</b> Local</p> <p><b>Excludes:</b> Customers</p> <p><b>Asg. Category excludes:</b> Bank, Honorary &amp; Locum</p>	<p><b>View:</b> Gauge (Default) / Graph</p> <p><b>Navigate to:</b> NHS Compliance Dashboard&gt;Competency Matching by Person tab</p> <p><b>Person Type:</b> Employee, Employee and Applicant</p> <p><b>Asg. Category excludes:</b> Bank, Honorary &amp; Locum</p>	<p><b>Group by:</b> Organisation / Org L1-13</p> <p><b>Navigate to:</b> NHS Compliance Trending Dashboard&gt;Organisation Compliance tab</p> <p><b>Asg. Category excludes:</b> Bank, Honorary &amp; Locum</p>																								

Note - Portlet filters have been agreed by the NSIG and are identical to the defaults agreed on the associated Dashboards. Dashboard filters can be changed if required. If an organisation wishes to change from the default requirement then they can create a custom portlet.

Portlets will state, "No data found" if there is no data available.

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## Custom Portlets

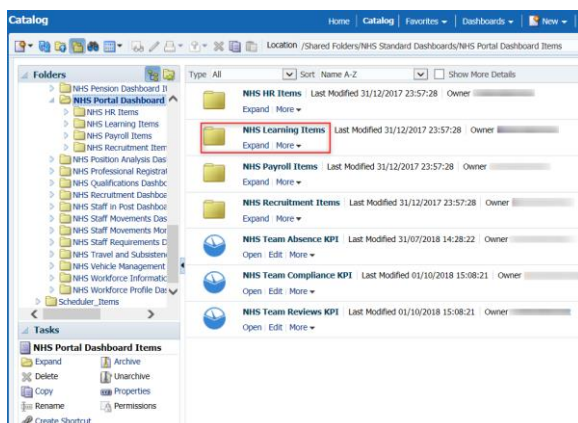
Organisations are advised to use the Nationally created Portlets. It is recognised that this may not always be appropriate so organisations have the ability to create their own local analysis and link to Custom Portlets.

## Creating a custom portlet

Users must have the BI Administration URP.

Start from scratch OR

Make a copy of the national versions (available in the NHS Portal Dashboard Items folder)



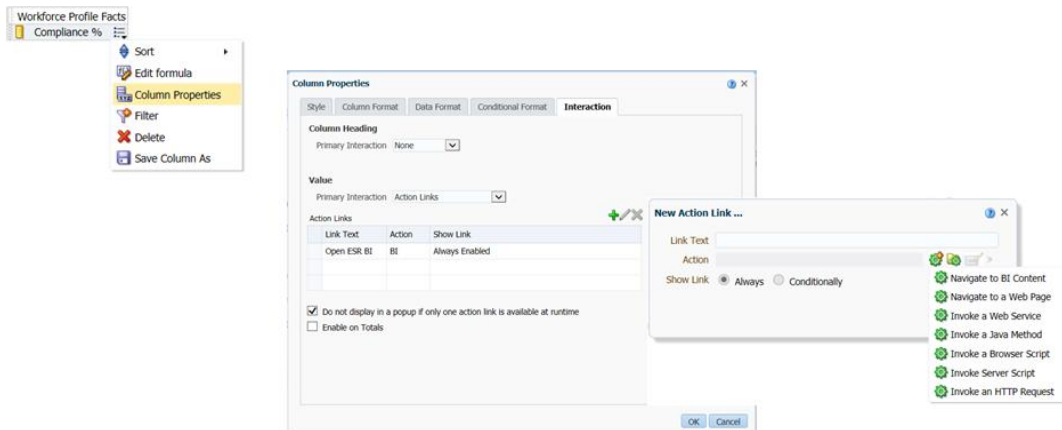
Guide available on Kbase, ESRBI - Using National Analyses Outside National Dashboards, on how to make a copy of a national analysis.



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## Linking to a Custom Portlet



### Prerequisites for a Custom Portlet Analysis:

Must be a 'standalone' analysis

Should display data in a suitable format such as a gauge, bar graph or table format

Must be performant

### Procedure to add to Production:

User must raise an SR and attach Portlet analysis

Guide available on Kbase, ESRBI - Managing Permissions and Archiving in ESR BI, which describes how to archive/unarchive .catalog files.

IBM will review the SR and pass to NHS Central Team for further review

NHS Central Team will review suitability and performance and will return to IBM for deployment to production.

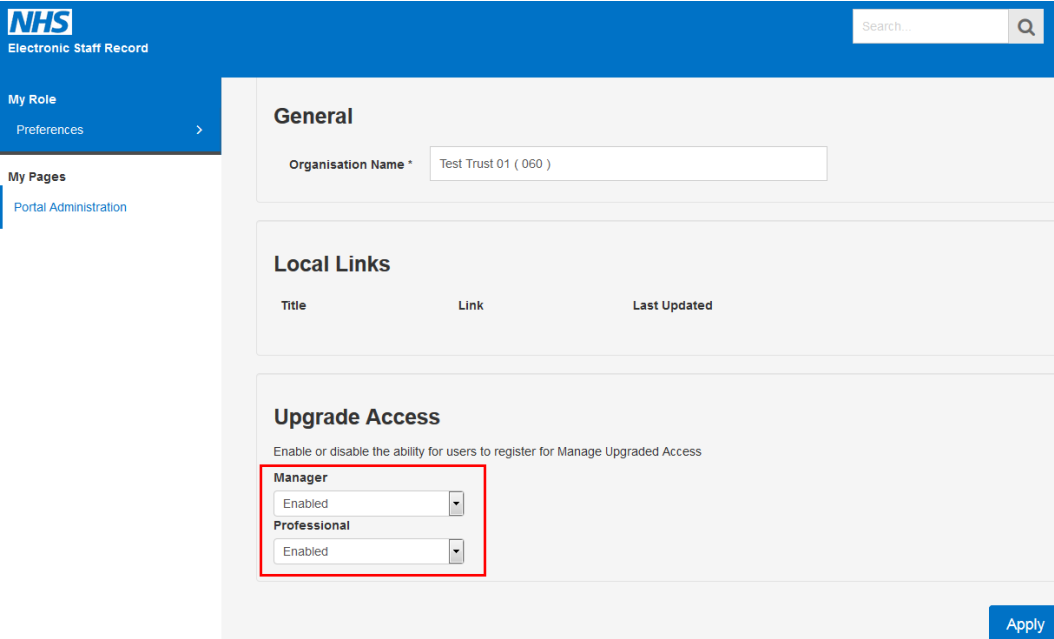
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## ESR BI over the Internet

Learning Administrators can access ESR BI over the Internet once they have upgraded their access.

To allow these users to upgrade their access, organisations must update their Portal settings changing the Upgrade Access setting for Managers and Professional users to Enabled. To access these settings the Portal Administration URP is required.



The screenshot shows the NHS Electronic Staff Record Portal Administration URP interface. The left sidebar contains navigation options: My Role, Preferences, My Pages, and Portal Administration. The main content area is divided into sections: General, Local Links, and Upgrade Access. The General section shows the Organisation Name as 'Test Trust 01 ( 060 )'. The Local Links section is a table with columns for Title, Link, and Last Updated. The Upgrade Access section is highlighted with a red box and contains two dropdown menus: Manager and Professional, both set to 'Enabled'. An 'Apply' button is located at the bottom right of the Upgrade Access section.

Title	Link	Last Updated
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**Upgrade Access**  
Enable or disable the ability for users to register for Manage Upgraded Access

**Manager**  
Enabled

**Professional**  
Enabled

Apply

## Further Information

How to enable Manager and ESR BI access over the Internet - [Portal Site Administrator](#)

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## Resources

Reporting section on Kbase - <https://www.electronicstaffrecord.nhs.uk/kbase/>

ESR BI online training - <https://www.esr-education.online/esrbi>

Guide to ESR Dashboards - <http://www.esrsupport.co.uk/ESRBI/guide/v2/>

All available from the Introduction to ESR BI dashboard.