NHS ELECTRONIC STAFF RECORD

ESR-NHS0229 - GUIDE TO ESRBI LEARNING ADMINISTRATION DASHBOARD

Information Classification: PUBLIC

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DOCUMENT CONTROL

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DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
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Design Assumptions

The following design assumptions have been made and can be applied to all analyses and dashboards:

1. All analyses have an export button to enable the user to export to their format of choice.
2. All analyses have an 'Add to Briefing Book' button enabled to allow the user to group national analyses together into a board-report type document.
3. All dashboards are designed on a screen resolution of 1024 x 768 pixels to prevent horizontal scroll bars being displayed (except where wide tables of data are required).

Examples

Where applicable, the examples included in this document contain fictional data only. The names and other personal details are fictional although look realistic enough to provide a useful example.

Learning Administration Dashboard

Description

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

Allocation

This 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)

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

Prompts

Course
Class Status
Enrolment Status
Class Start Date Between
Category
Sub-Category
Delivery Mode
Class Title
Staff Group
Organisation
Assignment Category
Assignment Status
Enrolment Status
Organisation Levels 1-13

Index

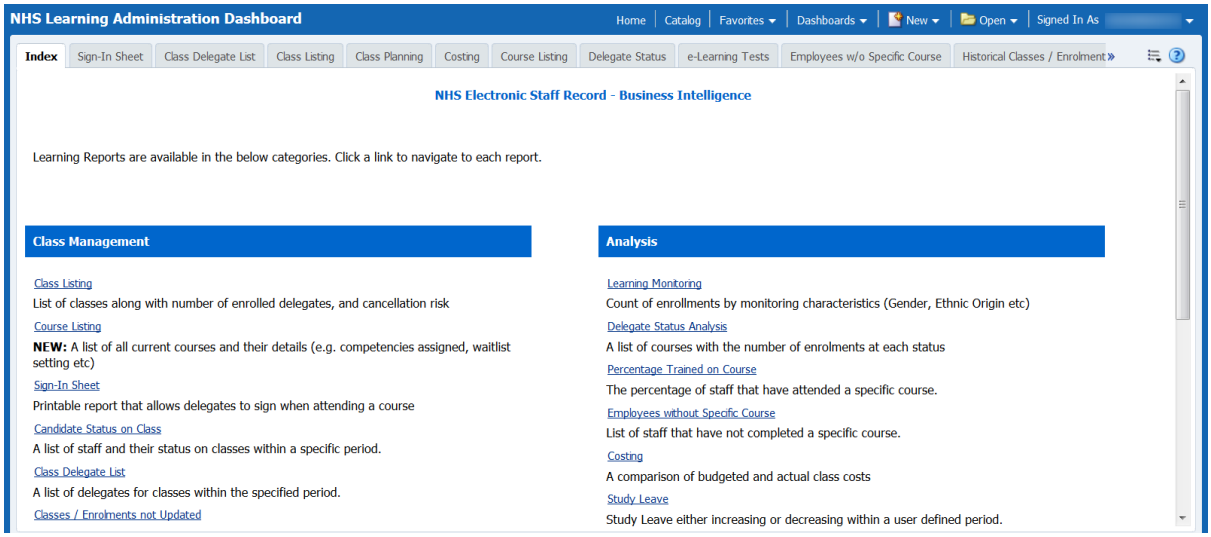
Description

Learning reports are available in four different categories below:

- Class Management
- Learning History
- Analysis
- e-Learning
- Apprenticeships

From this tab users are able to click on links provided to navigate to each report.

Example Screenshot



Sign-In Sheet

Description

This tab provides users with an exportable Class Sign-In Sheet. Users are able to select a date range for classes and an Enrolment Status of their choice (Default: Confirmed).

Data Items

Employee Number	Delegate Name
Position	Organisation
Email	Telephone
Role	Staff Group
Course	Date
Time	Enrolment Status
Location	Class Name

Prompts

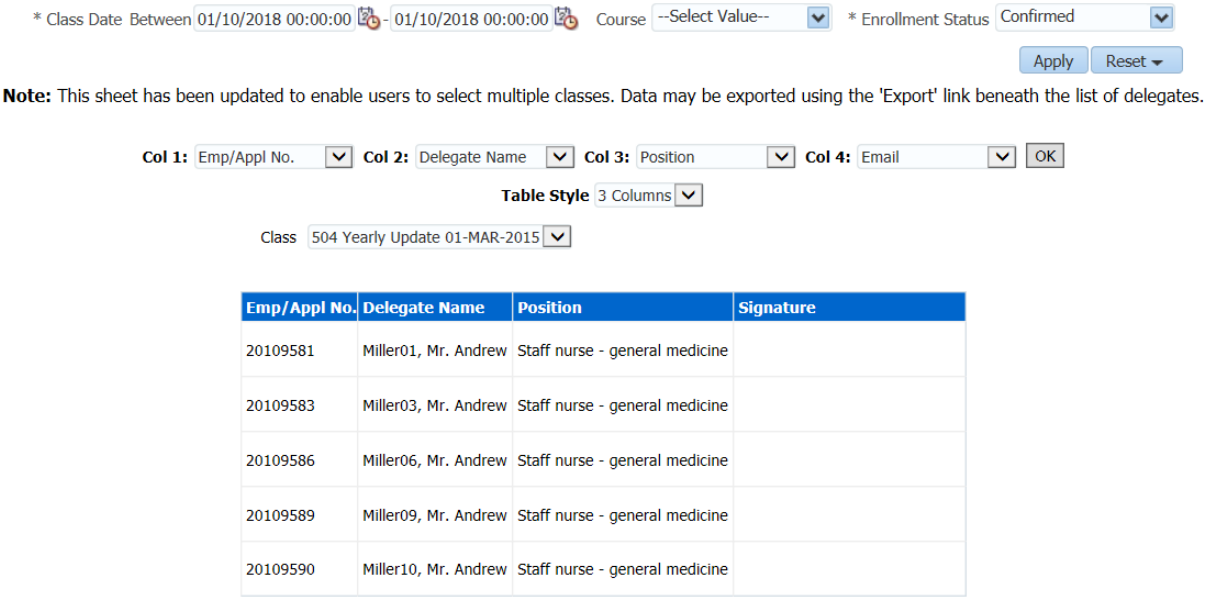
*Class Date Between

Course

Class

*Enrolment Status (Default: Confirmed)

Example Screenshot



Course Calendar

Description

This tab provides users with an exportable Course Calendar. The analysis shows Courses and numbers of Booked or Available Places for associated Classes running over a period of time, defaulted to current month but with option to change to any period.

Data Items

Title	Description
Course	

Course Start Month	
Course Start Day of Month	
Course Start Day Name	
Booked Places	Number of confirmed enrolments for the class(es) associated with each Course
Available Places	Number of remaining places for the class(es) associated with each Course

Prompts

Course

Delivery Mode

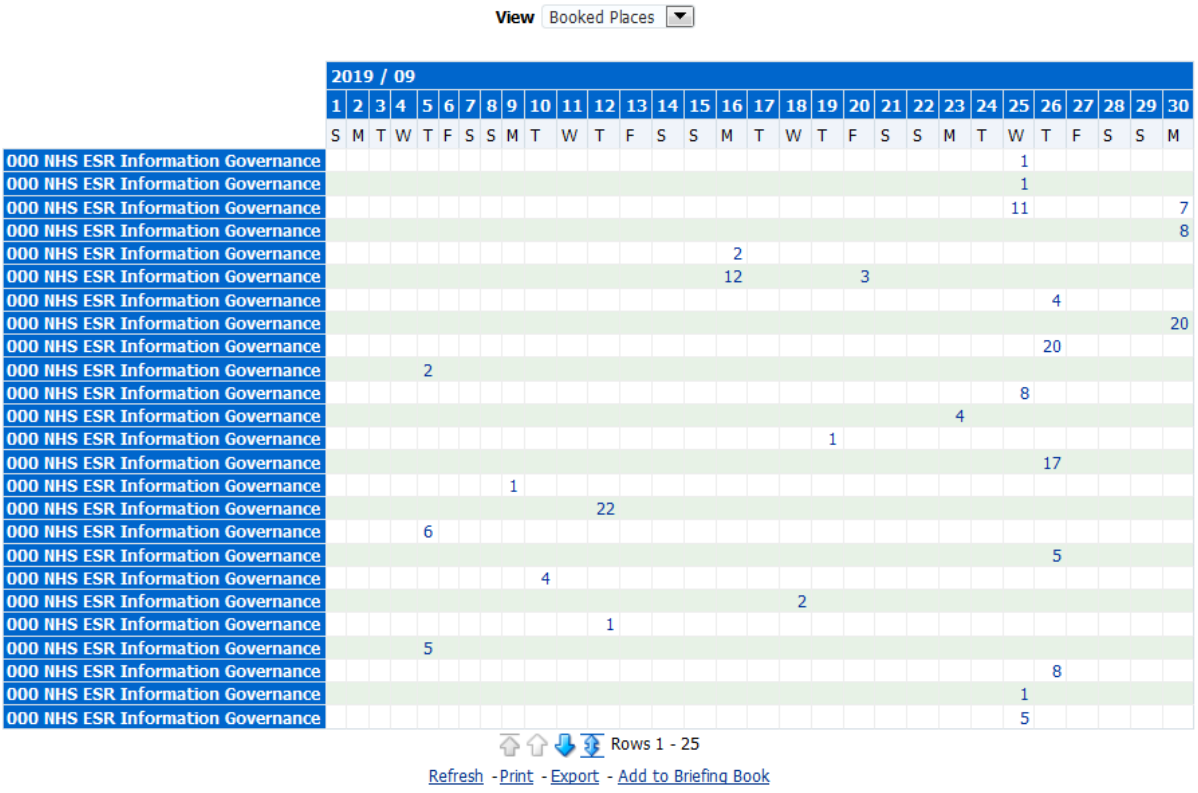
Class Date Between

View Selector

Booked Places

Available Places

Example Screenshot



Class Delegate List

Description

The Class Delegate List Report is used by the HR/Training team to determine the list of delegates attending the Class selected.

Data Items

Primary Category	Primary Sub-Category
Course	Delivery Mode
Title	Start Date
End Date	Start Time
End Time	Primary Trainer
Primary Venue	Title
First Name	Last Name
Preferred Name	Internal/Customer
Organisation	Role
Position Title	Supervisor
Customer Name	Supervisor Employee Number
Phone Number	Address
Email	Contact Full Name
In Certification	Places
Special Requirements	Enrolment Status Name

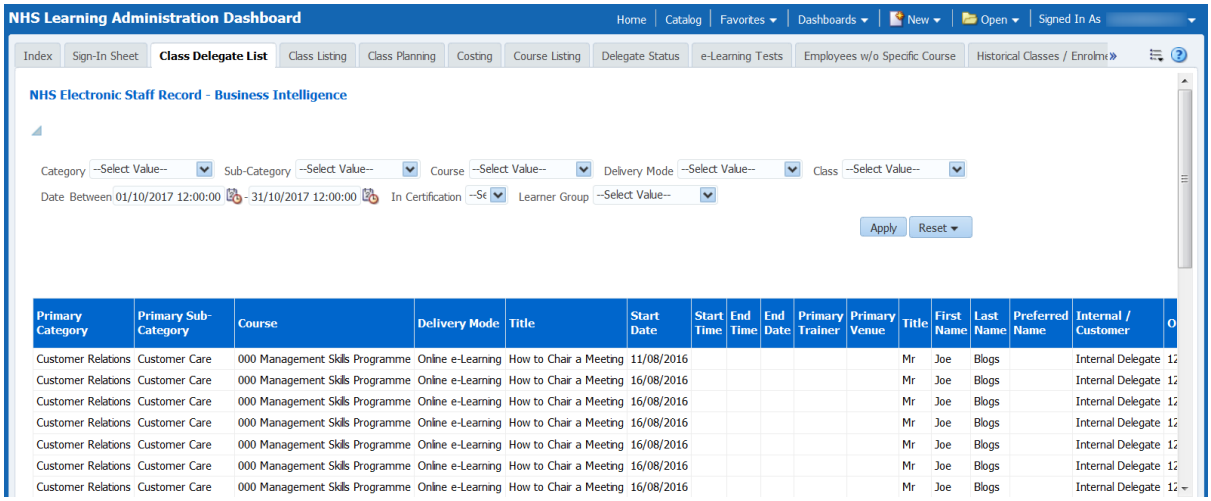
Prompts

Date Between
In Certification
Learner Group
Long Term Absence Type
Long Term Absence >= (Days)

Column Selectors

None

Example Screenshot



Class Listing

Description

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

Data Items

Course	Delivery Mode
Primary Venue	Internal Delegates
Customers	All Delegates
Places Remaining	Cancellation Reason
Class Cancellation Risk	Event Status
Category	Sub-Category
Title	Primary Trainer
Start Date	End Date
Start Time	End Time
Enrolment Start Date	Enrolment End Date
Maximum Attendees	Minimum Attendees
Enable Learner Access	Last Updated By
Offering Name	Last Updated Date
OLM Data Group	

Assumptions

- The Internal, External and Total Delegate counts are made up of delegates where the current enrolment status is 'Completed', 'Not Completed' or 'Confirmed'.
- Non Online e-Learning Classes will be selected where the class start date falls between Class Start Date Prompts.
- Online e-Learning Classes will be selected where the Class From Date is Less than the To Date Prompt and the Class End Date is Greater than the From Date Prompt.

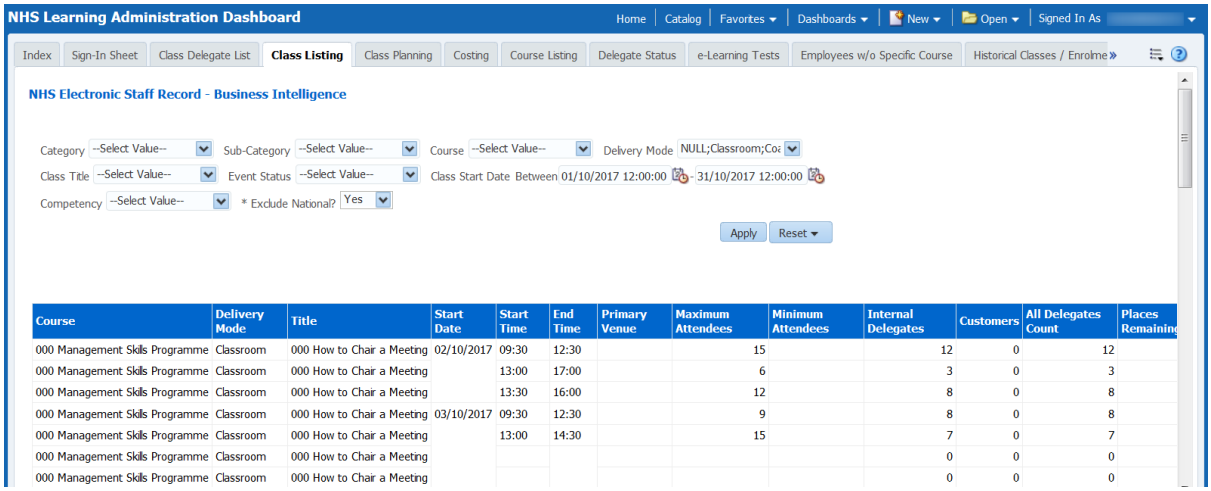
Cancellation Risk colour is calculated as below:

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)

Prompts

Event Status
Competency
*Exclude National? (default: Yes)
Restrict to Closed for Enrolment with Available Spaces
Enrolment Status to include in 'All Delegates Count'

Example Screenshot



Class Planning

Description

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. Users are able to click on the number of spaces available to see the classes for which there are spaces available.

Data Items

Competency	Required (Count)
Available Places (Count)	Ratio

Prompts

Competency

Number of Days to Look Forward (based on Class Start Date)

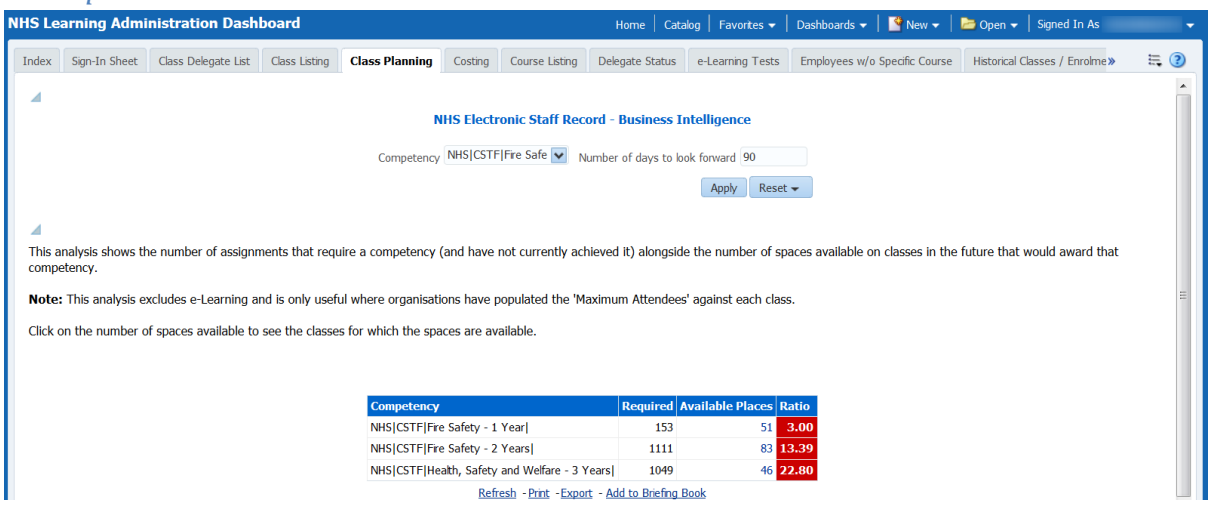
Column Selectors

None

Action Links

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.

Example Screenshot



Class Enrolment Method

Description

This analysis shows the different methods used to enrol learners onto classes over a period of time. It is designed to help Learning Administrators promote self-enrolment via Employee Self Service.

Data Items

Title	Description
Total Enrolment Count	
Auto Enrolment	Number of enrolments made by Auto Enrol
Learning Administration	Number of enrolments made by Learning Administrators
Class Administration	Number of enrolments made by Class Administrators
Employee Self Service	Number of enrolments made via Employee Self Service
Manager, Supervisor and Administrator Self Service	Number of enrolments made via Manager, Supervisor and Administrator Self Service
Auto Enrolment %	Number of enrolments made by Auto Enrol / Total Enrolment Count * 100
Learning Administration %	Number of enrolments made by Learning Administrators / Total Enrolment Count * 100
Class Administration %	Number of enrolments made by Class Administrators / Total Enrolment Count * 100
Employee Self Service %	Number of enrolments made via Employee Self Service / Total Enrolment Count * 100
Manager, Supervisor and Administrator Self Service %	Number of enrolments made via Manager, Supervisor and Administrator Self Service / Total Enrolment Count * 100

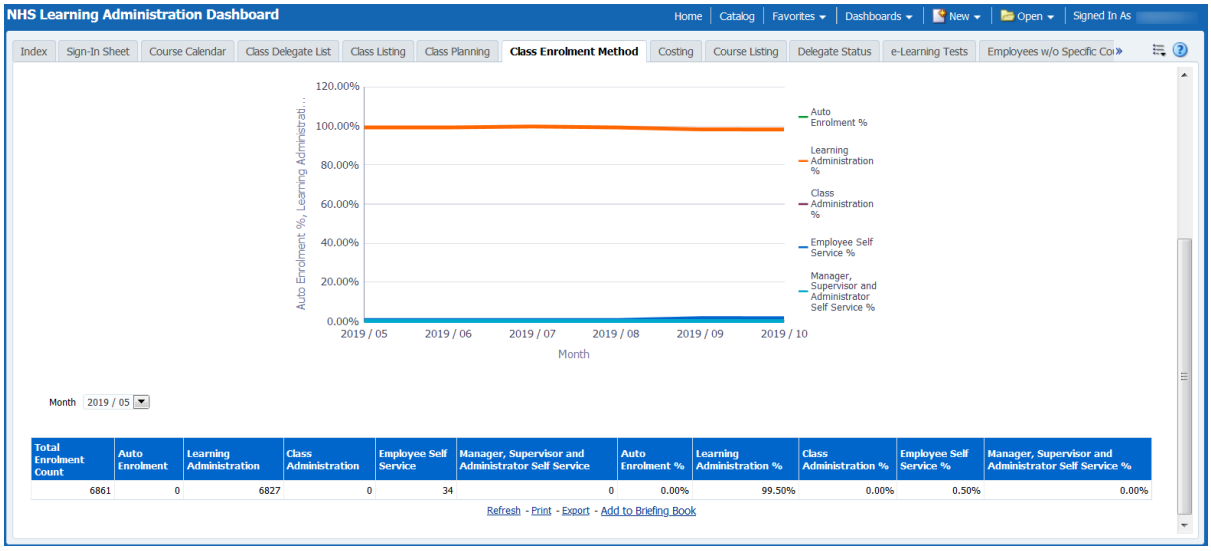
Prompts

Organisation
Staff Group
Job Role
Person Type
Employee Person Type
Enrolment Date Between

View Selectors

Line Graph (Default)
Bar Graph

Example Screenshot



Costing

Description

This report provides authorised reporting users with information in order to compare budgeted and actual costs of training at course and class level and to view the costs of training in terms of resources used and student attendance.

Data Items

Course	Sponsor
Budget Cost	Actual Cost
National Funding Body	Local Funding Body
Funding Amount	Class Type
Class Title	Class Status
Sponsor	Start Date
End Date	Budget Cost (class)
Actual Cost (class)	Class Resource Cost
Price	

Prompts

Enrolment Status

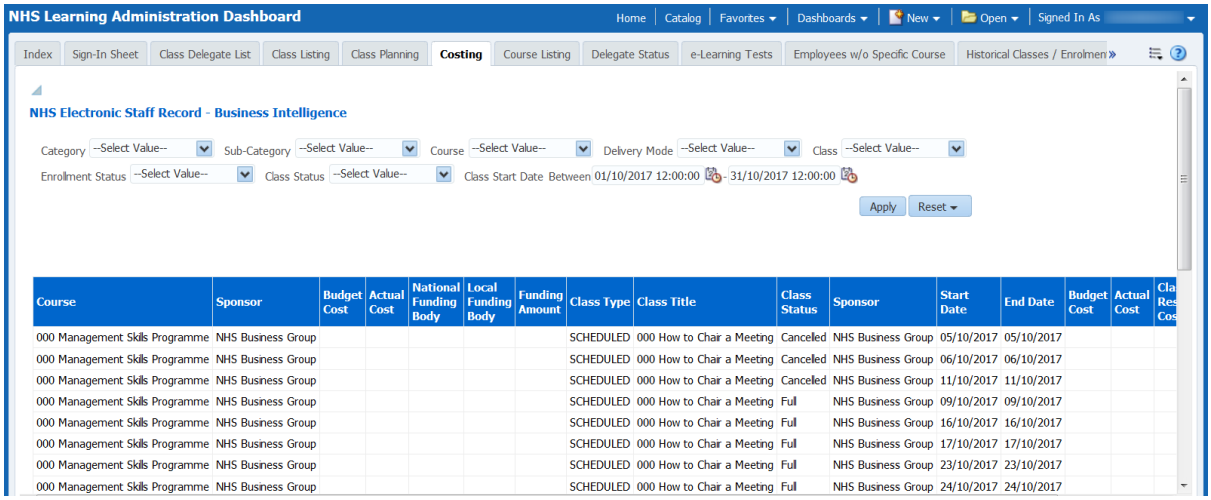
Class Status

Class Start Date Between

Column Selectors

None

Example Screenshot



Course Listing

Description

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

Data Items

Course	Start Date
End Date	Competency
Proficiency Level	Status
Competency Update Setting	Course Code
Auto-Enrolment Opt Out	Deactivate Waitlisting
Primary Category	Primary Sub-Category
Creation Date	Creation By
Last Updated Date	Last Updated By

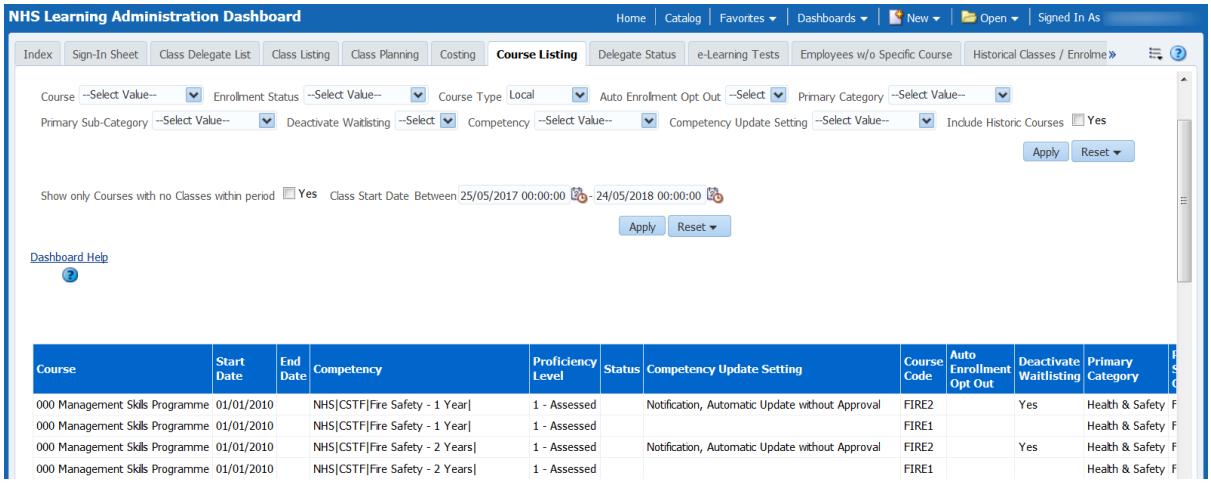
Prompts

Auto-Enrolment Opt Out
Deactivate Waitlisting
Competency
Competency Update Setting
Include Historic Courses
Show only Courses with no Classes within period
Class Start Date Between

Column Selectors

None

Example Screenshot



Delegate Status

Description

This analysis is designed to provide HR staff, Trainers and Managers with information about the status of the course, class or classes selected. Users can choose whether to include empty classes or not. **Please note:** This analysis updates overnight.

Prompts:

Course(s)
Date Between
Learner Group
Include Empty Classes? (default: No)

Column Selectors:

Group by Course or Class

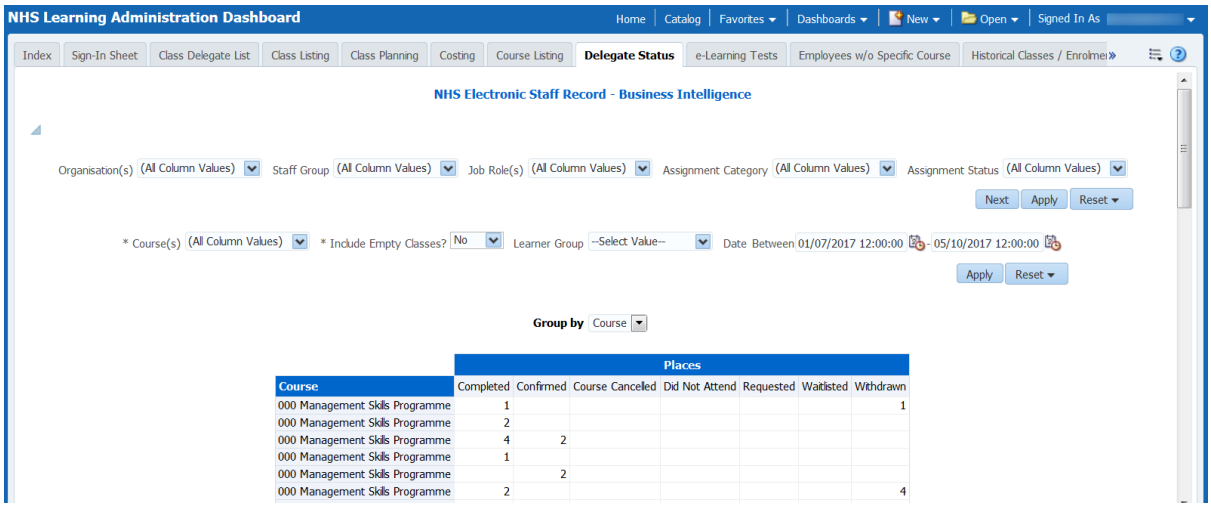
Assumptions:

- Non Online e-Learning Classes will be selected where the class start date falls between the between the Date Prompts.
- Online e-Learning Classes will be selected where the date first played falls between the Date Prompts.

Data Items

Course	Places
Class	Status

Example Screenshot



e-Learning Tests

Description

The e-Learning Test report provides Class Trainers with a summary of delegate's scores from online tests. Classes are returned where the Date First Played falls between the available Date Prompt.

Data Items

Category	Sub-Category
Course	Class
Delegate Name	Employee Number
Organisation	Job Role
Enrolment Status	Enrolled Date
Test Date	Date First Played
Last Attempt Date	Player Status
Time	Mastery Score
Attempts	Score

Prompts

Training Centre

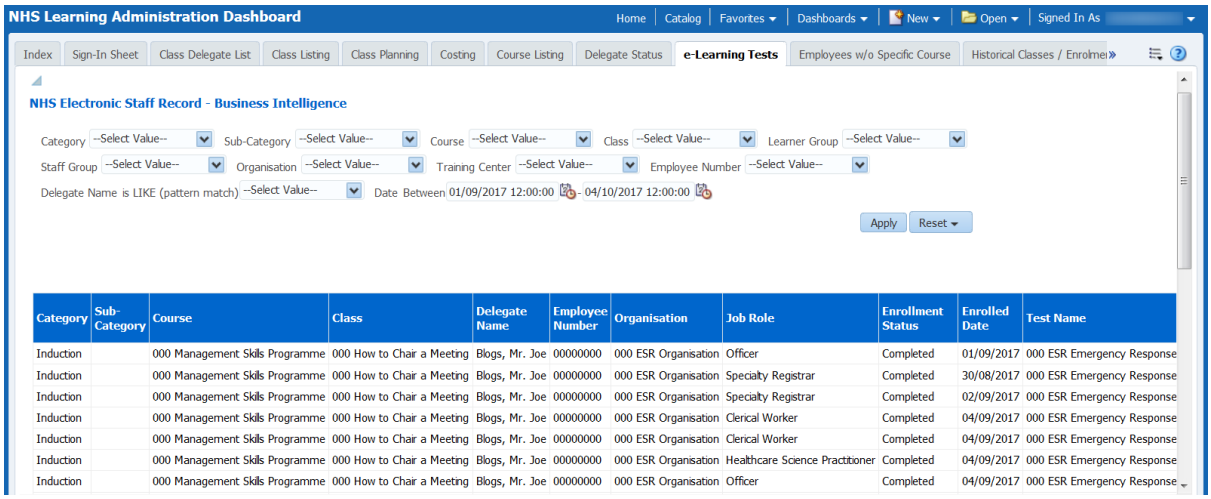
Delegate Name is LIKE

Date between

Column Selectors

None

Example Screenshot



Employees Without a Specific Course

Description

This report provides authorised reporting users with details of employees who have not attended a specific Course(s).

Note: The Employee Course Completions report enables users to view employees that have not yet completed a number of courses. This report is designed to enable users to view who hasn't completed all of the course(s) selected.

Prompts:

Course
Date Between

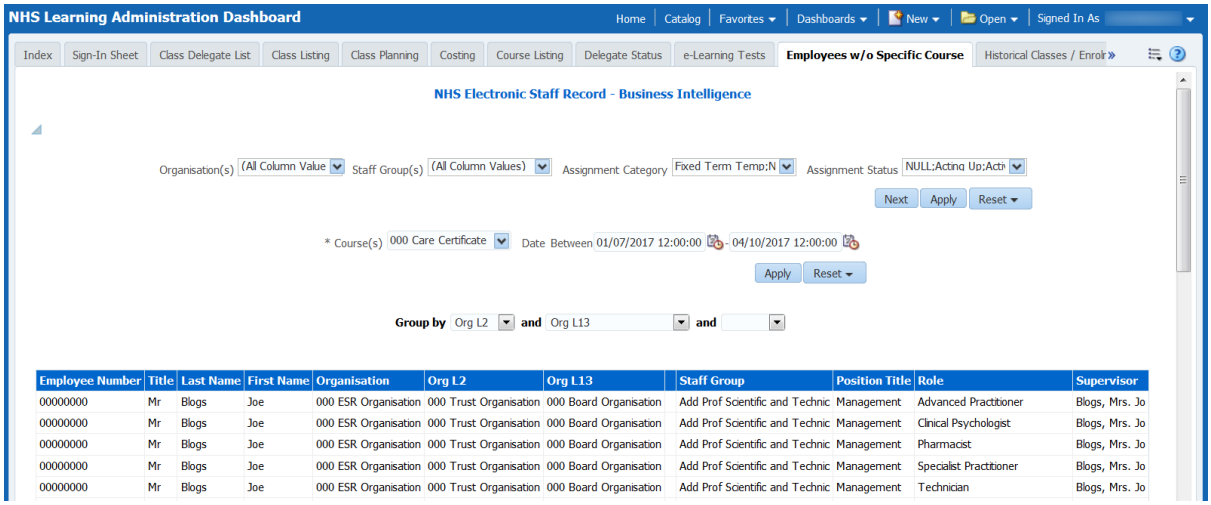
Column Selectors:

Org Level (default: Org L2)
Org Level (Default: Org L13)
Org Level

Data Items

Employee Number	Last Name
First Name	Title
Staff Group	Role
Organisation	Org L1-13
Position Title	Supervisor

Example Screenshot:



Historical Classes/Enrolments Not Updated

Description

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.

Data Items

Class Name	Number of Enrolments
Start Date	Employee Number
End Date	Delegate Name
Status	Enrolment Status

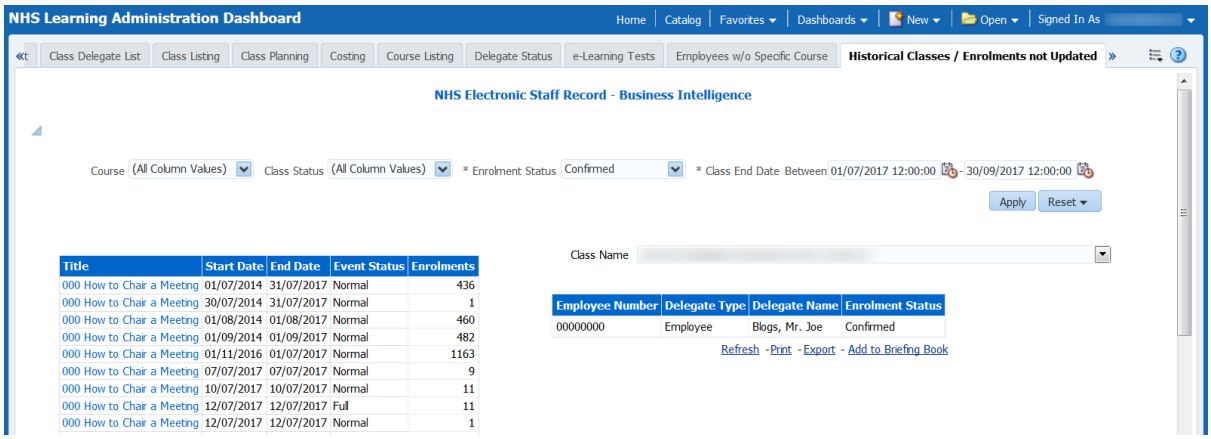
Table Prompt

Class Name

View Selector

None

Example Screenshot



Actions

None

Learning Record (All Delegates)

Description

This worksheet provides users with information regarding classes attended for all delegates based on when the learning took place (rather than current employment status). Where the class was e-Learning then the Date Last Played is used, where the delegate was an external learner then Completion Date is used otherwise the analysis is based on Class End Date.

- For Shared Training Centre (STC) Providers, the Learning Record report will include enrollees from the STC Customer. For enrollees from the STC Customer it will only display the classes that are run by the STC Provider, not the enrollee's entire learning history.
- When the report is run by a STC Customer, the report will include learning records that their employees have completed with the STC Provider.

Data Items

Delegate Name	Employee Number
Organisation	Staff Group
Supervisor	Mobile Phone Number
Supervisor Employee Number	Sub-Category
Category	Delivery Mode
Class Name	Course
Class Start Date	Date Placed
Class End Date	Status Changed By
Duration	In Certification
Enrolment Status	Supplier
Date Status Changed	Person Type
Customer	Cost External (£)
Actual Termination Date	Date First Played
Cost Student (£)	Player Status
e-Learning Completion Date	Mastery Score
Player Time	Special Requirements
Score	External Learning Flag
Enrolment ID	Moved to History
Primary Trainer	Change Reason
Primary Venue Name	Applicant Number
Org Levels 1-13	

Prompts

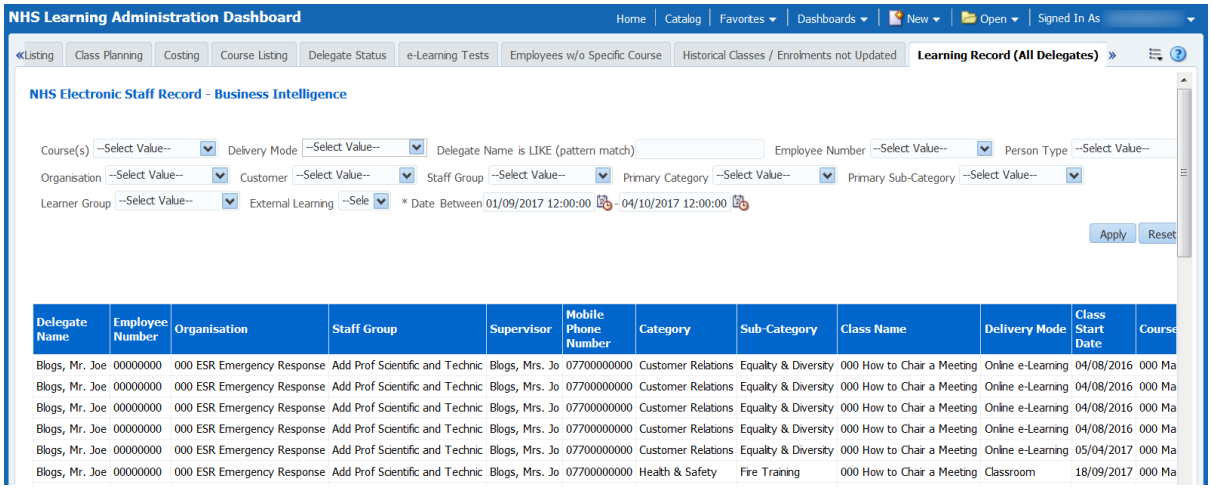
Customer
Course(s)
Delivery Mode
Enrolment Status
Delegate Name is LIKE (pattern match)
Employee Number

Person Type
Organisation
Staff Group
Primary Category
Primary Sub-Category
Learner Group
External Learning
* Date Between

Column Selectors

None

Example Screenshot



Monitoring

Description

This analysis is designed to show summary counts of learning enrolments grouped by a range of protected characteristics including Gender, Ethnic Origin and Disability. Users will be prompted to select a course using the Course prompt and a Date range.

Data Items

Gender	Disability
Ethnic Origin	Assignment Category
Employee Category	Age Band
Sexual Orientation	Religious Belief
Staff Group	Organisation
Job Role	Org L1-7
Course	Delivery Mode

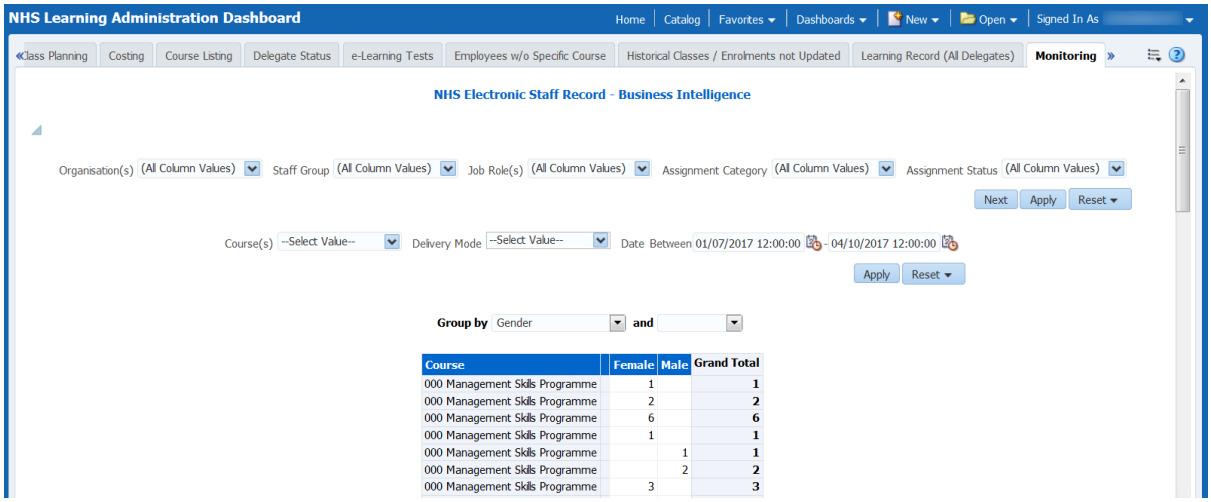
Prompts

Organisation(s)
Staff Group
Job Role(s)
Assignment Category
Assignment Status
Course(s)
Delivery mode
Date Between
Group by

Action Links

None

Example Screenshot



Online Test Analysis

Description

The Employee Online e-Learning Test Analysis report provides Class Trainers with a summary of delegate's scores from online tests.

Data Items

Category	Sub-Category
Course	Mastery Score
Maximum Score	Minimum Score
Standard Deviation	Total Learners
Learners Passed	Learners Failed
Learners Completed	Learners Incomplete
Learner Average Time	Learner Average Score
Total Number of Attempts	Average Score
Total Time	Questions Attempted
Questions Correct	Questions Incorrect
Questions Skipped	Class
Test Name	First Performance Date
Last Performance Date	

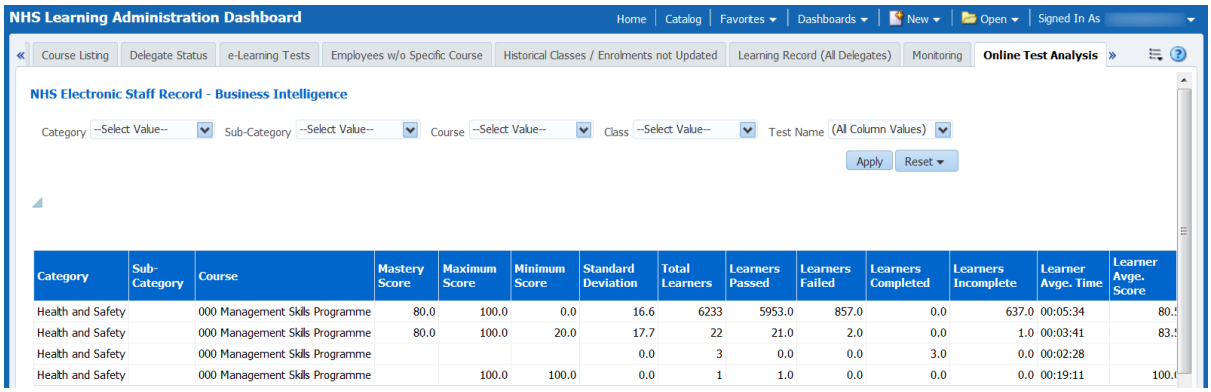
Prompts

Test Name

Column Selectors

None

Example Screenshot



Player Performance Summary

Description

The Player Performance Summary worksheet provides Learning Administrators with a summary of the variance of results achieved on e-learning courses they offer.

Data Items

Course	Name
Mastery Score	Minimum Score
Maximum Score	Average Player Score
Standard Deviation	Average Time
Longest Time	Total Learners
Total Performances	

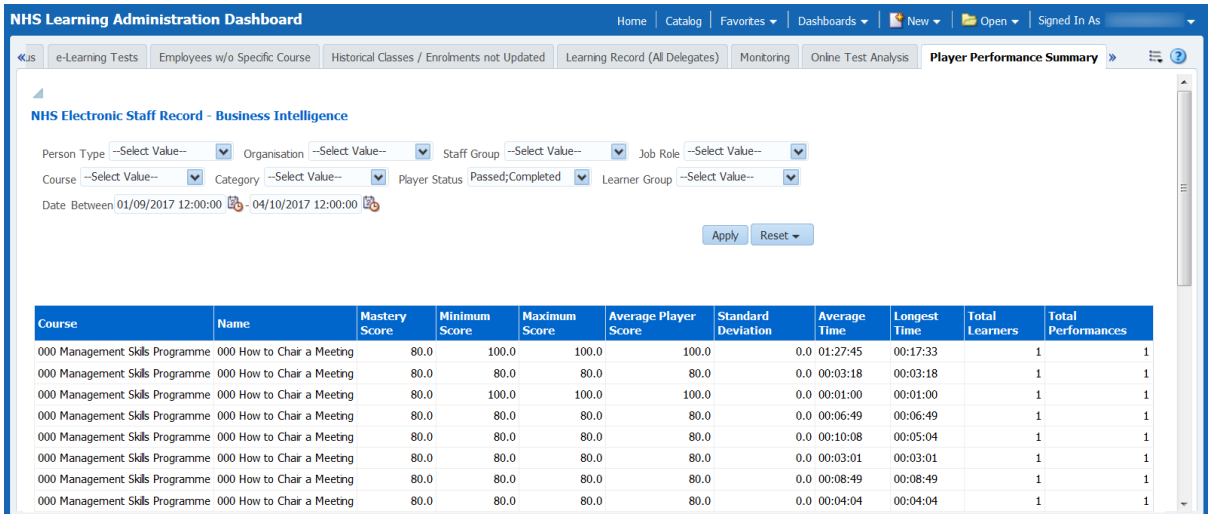
Prompts

Player Status

Column Selectors

None

Example Screenshot



Player Status Analysis

Description

The Player Status Analysis report provides a summary to learning administrators of the number of enrolments at a specific status on the e-Learning courses they offer.

Data Items

Course	Learning Object
Player Status	

Prompts

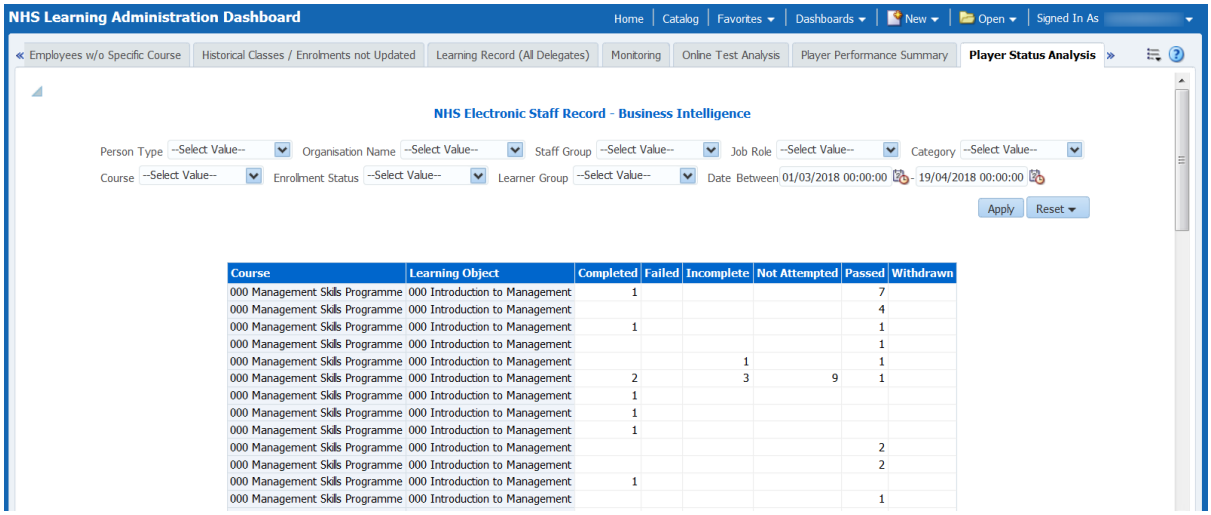
Course

Learner Group

Column Selectors

None

Example Screenshot



Selective Course Completions

Description

This analysis is designed to be a replication of the 'Employee Course Completions' report from Discoverer. Simply select the courses you wish to report on along with a date range, and the report returns a row for each person with the date they completed the course along with assignment details effective as at today's date.

Data Items

Employee Number	Assignment Number
Employee Name	Assignment Category
Assignment Status	Position
Staff Group	Organisation
Job Role	Course
Org L1-13	Employee Latest Start Date
Pay Grade	Enrolment Email Address
Employee Email Address	

Prompts

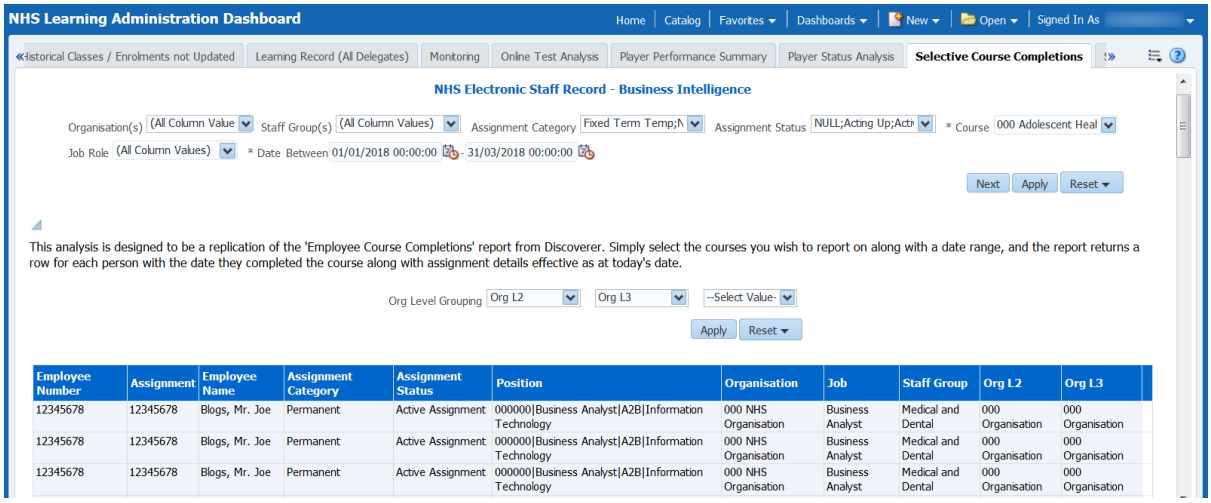
Course(s)

Date Between

Action Links

None

Example Screenshot



Study Leave

Description

This page of the dashboard provides the capability to analyse employee study leave and provide details of absence due to study decreasing or increasing leave and associated training record history. Depending on the user prompt selection, either the decreasing or increasing analysis will display.

Data Items

Employee Name	Employee Number
Staff Group	Absence Type
Absence Reason	Absence Start Date
Absence End Date	Calendar Days Lost
Study Leave Allocation	Number of Days Taken
Number of Days Remaining	Course Name
Successfully Attended	Failure Reason
Competencies Gained	Proficiency Level Name
Course Exam Fee Amount	Course Exam Fee Amount Percentage
Study Allocation Start Date	Course Venue
Course Location	

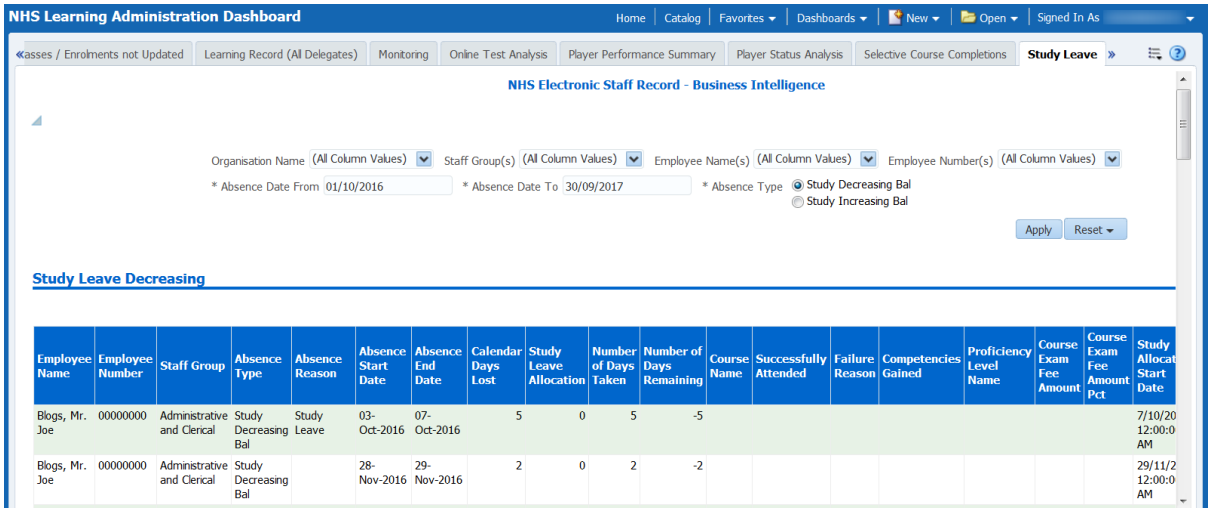
Prompts

Employee Number
Employee Name
Absence Start Date
Absence End Date
*Absence *(Study Leave)* Type (required)

Column Selectors

None

Example Screenshot



Percentage Trained on Course

Description

This analysis returns the number of primary assignments (as at today) that have completed a course, or one of a number of courses. Select a course using the prompts above and a date range for when employees should have completed the course. Selecting multiple courses will mean the analysis returns the number of assignments that have completed any of those courses.

Data Items

Title	Description
Headcount Completed	
Headcount Not Completed	
Percentage (Completed)	Headcount of Employees who have completed a course / Total Headcount * 100
Percentage (Not Completed)	Headcount of Employees who haven't completed a course / Total Headcount * 100

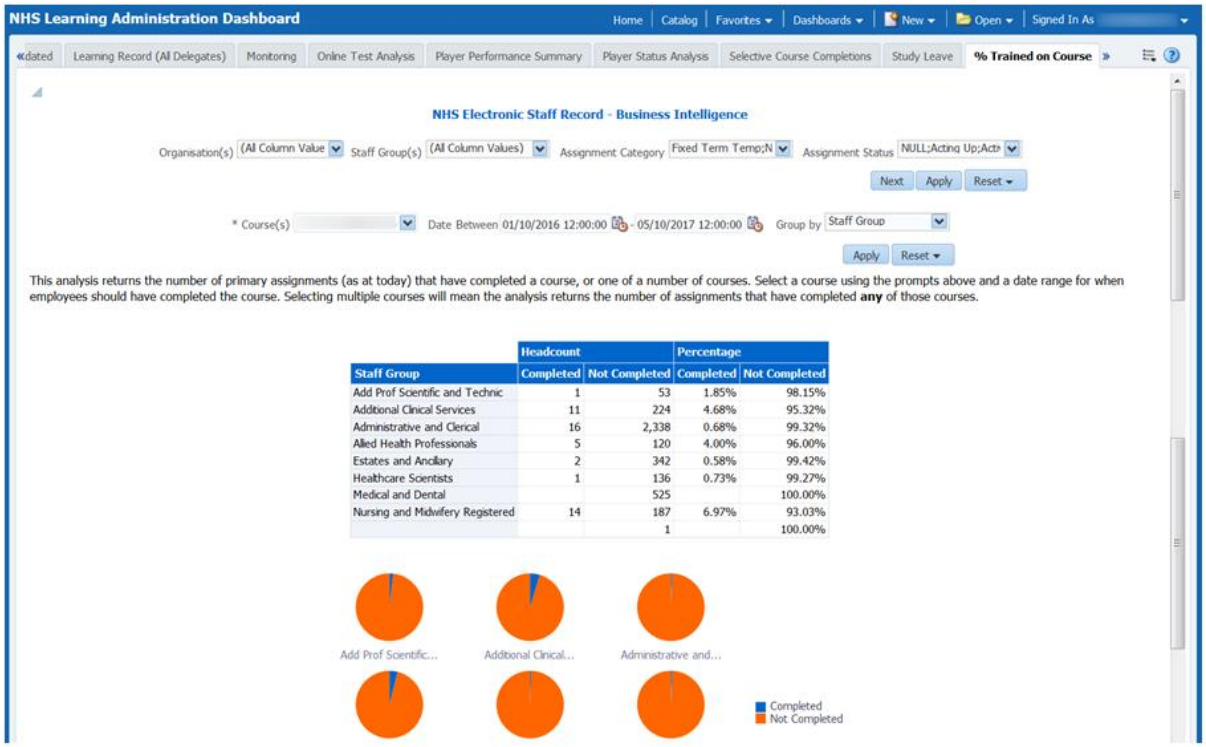
Prompts

Organisation(s)
Staff Group
Job Role(s)
Assignment Category
Assignment Status
Course(s)
Date Between
Group by

Action Links

None

Example Screenshot



Individual Learning Path

Description

This analysis allows users to analyse the subscriptions and status of course enrolment of an individual leaner subscribed on Learning Paths.

Data Items

Learning Path Name	Completion Type
Start Date	Course
End Date	Course Completion Target Date
Learning Path Section	

Prompts

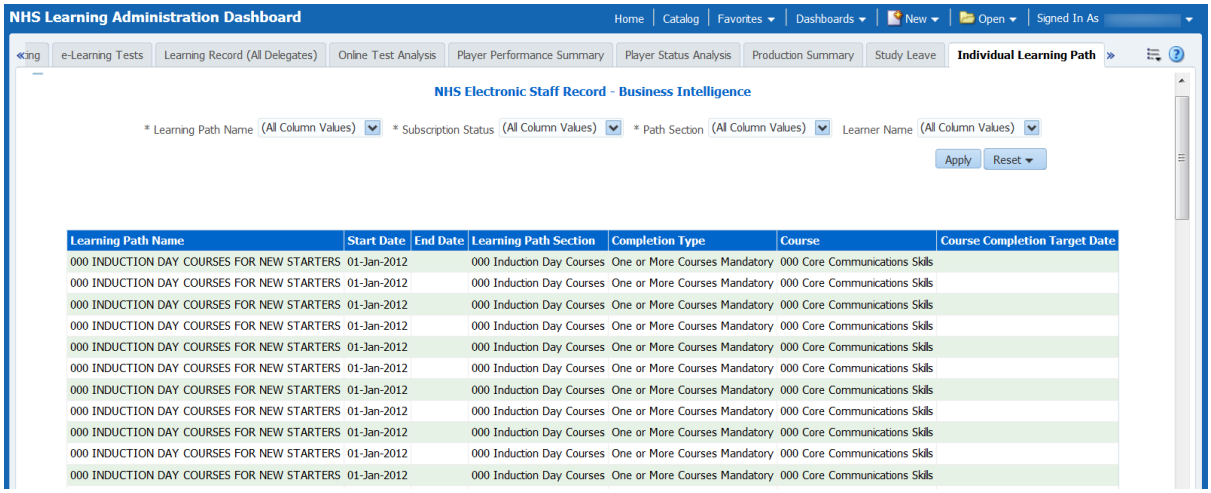
* Learning Path Name
* Subscription Status
* Path Section

Learner Name

Column Selectors

None

Example Screenshot



Learning Path Subscriptions

Description

This analysis allows users to analyse the subscriptions and status of course enrolments of those people subscribed on a Learning Path.

Data Items

Learning Path Name	Job Role
Learning Path Start Date	Subscription Status
Learning Path End Date	Completion Target Days
Title	Expected Completion Date
First Name	Completion Date
Last Name	Total Courses in Sections
Organisation	Total Mandatory Courses
Staff Group	Total Mandatory Courses Completed
Email Address	

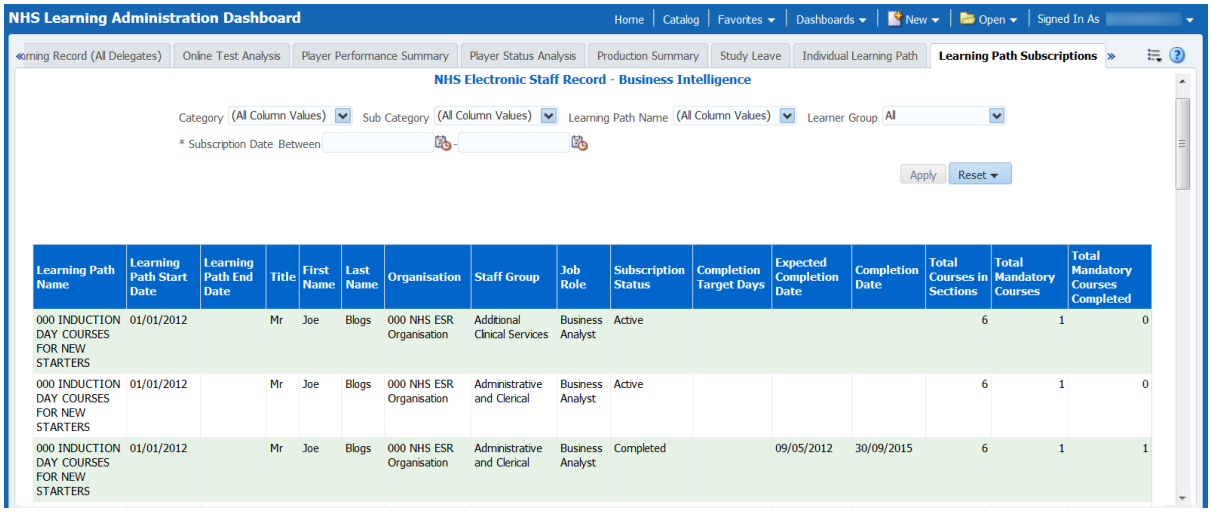
Prompts

Category
Sub Category
Learning Path Name
Learner Group
* Subscription Date Between

Column Selectors

None

Example Screenshot



Learning Path Name	Learning Path Start Date	Learning Path End Date	Title	First Name	Last Name	Organisation	Staff Group	Job Role	Subscription Status	Completion Target Days	Expected Completion Date	Completion Date	Total Courses in Sections	Total Mandatory Courses	Total Mandatory Courses Completed
000 INDUCTION DAY COURSES FOR NEW STARTERS	01/01/2012		Mr	Joe	Blogs	000 NHS ESR Organisation	Additional Clinical Services	Business Analyst	Active				6	1	0
000 INDUCTION DAY COURSES FOR NEW STARTERS	01/01/2012		Mr	Joe	Blogs	000 NHS ESR Organisation	Administrative and Clerical	Business Analyst	Active				6	1	0
000 INDUCTION DAY COURSES FOR NEW STARTERS	01/01/2012		Mr	Joe	Blogs	000 NHS ESR Organisation	Administrative and Clerical	Business Analyst	Completed		09/05/2012	30/09/2015	6	1	1

Learning Objects Listing

Description

This analysis return a list of local learning objects associated with current (open ended) courses.

.

Data Items

Course	Mime Type
Learning Object Name	Author
Identifier	Starting URL Exists
Parent Learning Object Exists	Starting URL
Published Status	Open in New Window
Tracking Type	Creation Date
Duration	Created By
Description	Last Updated Date
Objectives	Last Updated By
Audience	Course Start Date
Hardware / Software Requirements	Course End Date
Mastery Score	Local / STC

Prompts

Identifier

Learning Object Name

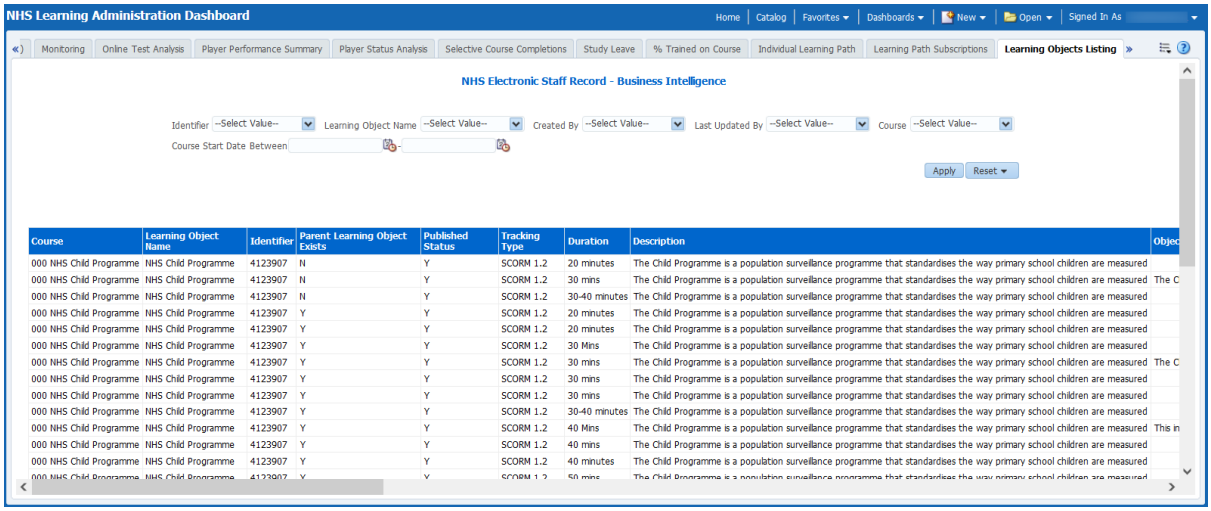
Created By

Last Updated By

Course

Course Start Date Between

Example Screenshot



Apprenticeships Summary

Description

Available on this tab are a number of summary analyses designed to provide high level information of employees undertaking Apprenticeship at a specified report effective date or period. The data returned is for employees whose EIT Apprenticeship details are populated in ESR and does not include those on an Apprentice Job Role which is no longer valid. Organisations are therefore advised to record Apprenticeships data using the Assignment EIT Apprenticeship functionality available in ESR to ensure apprenticeships are being reported correctly. Please note that this tab is also available in the NHS Staff in Post Dashboard.

Prompts

Effective Date
Apprentice Type
Status
Employee Number
Assignment Number
Restrict to Current Employment (Yes: Optional)
Include Leavers for Previous Two Years (Yes: Optional)

Summary

Description

This analysis is designed to show FTE, Headcount (Default) and Headcount percentage of employees undertaking Apprenticeship at a specified report effective date grouped by Staff Group, Organisation Levels 1-13, Pay Grade, Age Band and a number of EIT Apprenticeship fields.

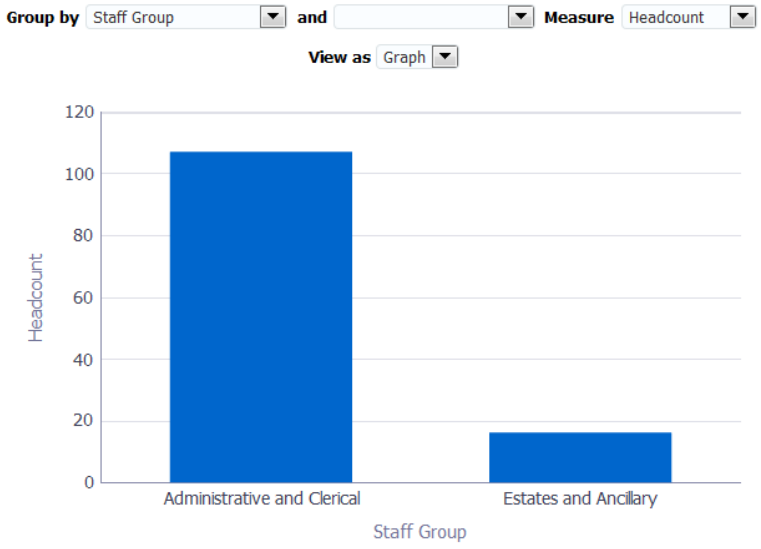
Data Items

Staff Group	Apprenticeship Level
Organisation Level(s) 1-13	Framework Standard
Staff Group	FTE
Pay Grade	Headcount
Age Band	Headcount %
Apprentice Status	
Apprentice Type	
Main Training Provider	

View Selector

View as Column Graph (Default) or Table

Example Screenshot



Apprenticeships Trending by Status

Description

This analysis is designed to show the number of Apprenticeships on a monthly basis as at the last day of the month, defaulted to one year ago from the last day of previous month.

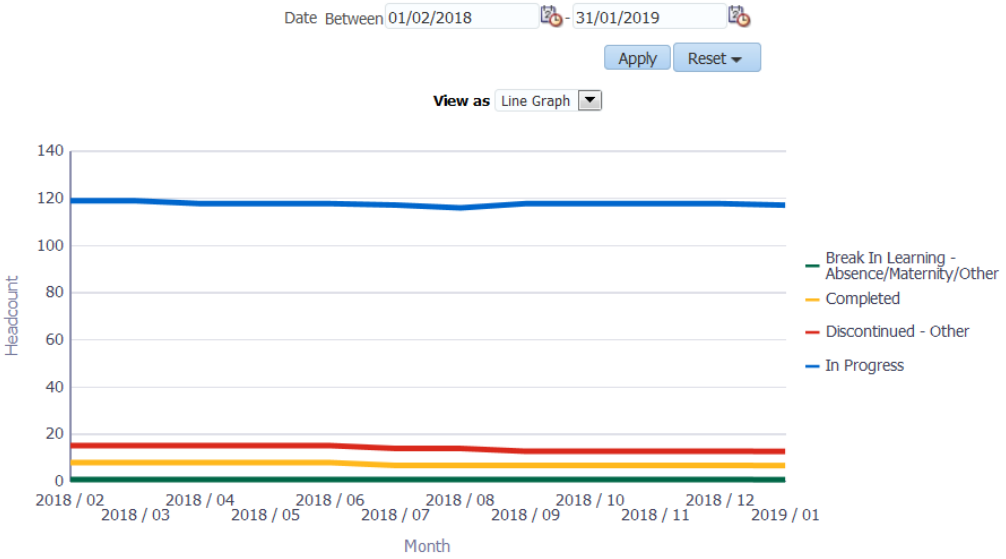
Data Items

Apprentice Status	Month
Headcount	

View Selector

View as Line Graph (Default) or Pivot Table

Example Screenshot



Apprenticeships Detail

Description

The Apprenticeships detail analysis returns a list of employees undertaking Apprenticeship within the Organisation. Only employees whose EIT Apprenticeship details are populated in ESR are returned and does not include those on an Apprentice Job Role which is no longer valid. Organisations are therefore advised to record Apprenticeships data using the Assignment EIT Apprenticeship functionality available in ESR to ensure apprenticeships are being reported correctly. Please note that this tab is also available in the NHS Staff in Post Dashboard.

Data Items

Employee Number	Position Title
Assignment Number	FTE
Last Name	Contract Hours
First Name	Pay Grade
Gender	Organisation Level 1-13
Email Address	Cost Centre Org L1-12
Assignment Category	Apprentice Type

Assignment Status	Apprenticeship Level
Primary Assignment	Framework Standard
Supervisor Name	Status
Supervisor Email Address	Start Date
Staff Group	Proposed End Date
Role	Actual End Date
Occupation Code	Main Training Provider
Area of Work	EPA Centre
Location Name	Age Band
Position Number	Employee Latest Start Date
Unique Learner Number	

Prompts

Effective Date
Apprentice Type
Status
Employee Number
Assignment Number
Restrict to Current Employment (Yes: Optional)
Include Leavers for Previous Two Years (Yes: Optional)

Column Selector

Organisation Level 1-13
Cost Centre Org L1-12

Example Screenshot

Apprentice Type	Apprenticeship Level	Framework Standard	Status	Start Date	Proposed End Date	Actual End Date	Main Training Provider	EPA Centre	Unique Learner Number	Age Band	Latest Start Date	Actual Termination Date
Existing Employee - Same Role	Level 4	Management	Completed - Remain In Post	10/05/2016	26/09/2017		10005716			51-55	08/09/2008	
New Employee	Level 4	Associate Ambulance Practitioner	In Progress	30/10/2019	30/04/2021		10042155			46-50	10/03/2024	
Existing Employee - Same Role	Level 3	Business and Administration	In Progress	05/04/2022	30/09/2023		10034450			51-55	06/03/2023	
Existing Employee - Same Role	Level 2	Management	In Progress	17/12/2018	06/03/2018		10024124			51-55	01/02/2007	
Existing Employee - Same Role	Level 2	Health and Social Care	Completed - Remain In Post	24/11/2010	26/04/2012	26/04/2012	10024124			41-45	22/05/2023	
Existing Employee - Same Role	Level 3	Business and Administration	Completed - Remain In Post	12/09/2017	01/02/2019	25/01/2019	10009902			31-35	06/09/2021	
Existing Employee - Same Role	Level 4	Business and Administration	Completed - Remain In Post	07/05/2019	28/02/2021	29/01/2021	10005716			31-35	06/09/2021	
Existing Employee - Same Role	Level 3	Health - Clinical Healthcare Support	Completed - Remain In Post	03/10/2019	01/08/2021	05/10/2021	10024124			31-35	27/02/2022	
Existing Employee - Same Role	Level 4	Management	Completed - Remain In Post	06/02/2020	11/06/2021	09/03/2021	10005716			36-40	02/07/2024	
Existing Employee - Same Role	Level 4	Accounting	Completed - Remain In Post	13/09/2021	02/06/2023	04/11/2022	10009902			36-40	18/10/2023	
Existing Employee - Same Role	Level 5	Management	In Progress	14/03/2018	06/09/2019		10005716			36-40	17/07/2017	
Existing Employee - Same Role	Level 2	IT Application Specialist	In Progress	30/10/2018	22/11/2019		10024124			56-60	26/01/2004	
Existing Employee - Same Role	Level 4	Associate Project Manager	In Progress	20/06/2018	12/06/2020		10005716			31-35	04/09/2017	
Existing Employee - Same Role	Level 3	Management	Completed - Remain In Post	19/10/2017	12/04/2019		10005716			36-40	05/05/2017	

Employee Details

Description

This tab provides the user with a range of information relating to a specific employee as defined by the available prompts.

Note: Leavers can be returned up to 2 years prior to current date.

Prompts

Employee Name *

Assignment Number *

Employee Details

Description

This analysis is designed to show various Employee details as part of the Employee Details Dashboard Page.

Data Items

Employee Name	Employee Address Line1
Assignment Number	Employee Address Line2
Organisation	Employee Address Line3
First Name	Employee Address City
Last Name	Employee Address Region1
Email Address	Employee Address Region2
Work Phone	Employee Address Region3
Home Phone	Employee Address Postal Code
Mobile Phone	Employee Address Country
Position Title	
Pay Grade	
Assignment Category	
FTE / Contract Hours	
Supervisor	
Location	
Latest Start Date	

Example Screenshot

Employee Details

Employee Number	20055417
Assignment Number	20055417
Organisation	504 Ward 9
First Name	Sarah
Last Name	007Lane
Email Address	
Work Phone	
Home Phone	
Mobile Phone	
Position Title	
Pay Grade	NHS|XR05|Review Body Band 5
Assignment Category	Permanent
FTE / Contract Hours	1.00 / 37.50 Week
Supervisor	
Location	504 ESR Hospital
Latest Start Date	01/01/2001

Employee Address Line1	100 ESR Street
Employee Address Line2	
Employee Address Line3	
Employee Address City	Warwick
Employee Address Region1	
Employee Address Region2	
Employee Address Region3	
Employee Address Postal Code	CV1 1AB
Employee Address Country	United Kingdom

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Professional Registration Body

Description

This analysis is designed to show an Employees Professional Registration Details.

Data Items

Professional Registration Body	Match

Example Screenshot

Professional Registrations

Register and Membership Body	Match
General Dental Council	✔

Prompts

None

Actions

None

Appraisal Reviews

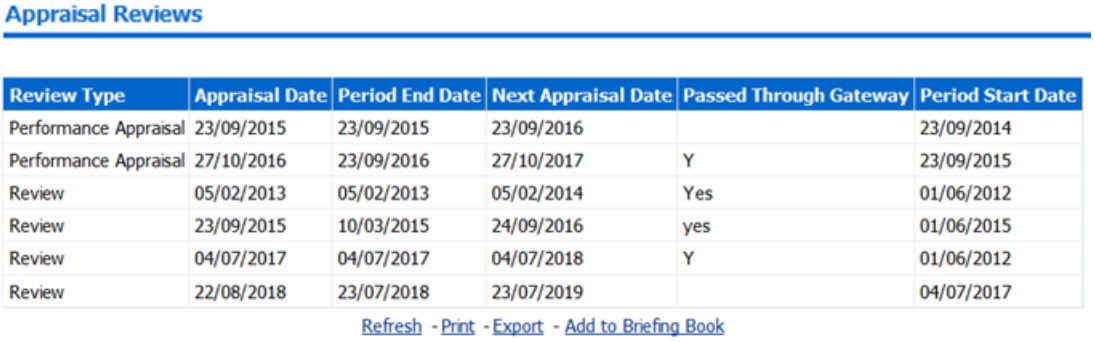
Description

This analysis is designed to show an Employees Appraisal Details.

Data Items

Review Type	Appraisal Date
Period End Date	Next Appraisal Date
Passed Through Gateway	Period Start Date

Example Screenshot



Appraisal Reviews

Review Type	Appraisal Date	Period End Date	Next Appraisal Date	Passed Through Gateway	Period Start Date
Performance Appraisal	23/09/2015	23/09/2015	23/09/2016		23/09/2014
Performance Appraisal	27/10/2016	23/09/2016	27/10/2017	Y	23/09/2015
Review	05/02/2013	05/02/2013	05/02/2014	Yes	01/06/2012
Review	23/09/2015	10/03/2015	24/09/2016	yes	01/06/2015
Review	04/07/2017	04/07/2017	04/07/2018	Y	01/06/2012
Review	22/08/2018	23/07/2018	23/07/2019		04/07/2017

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Compliance Matching

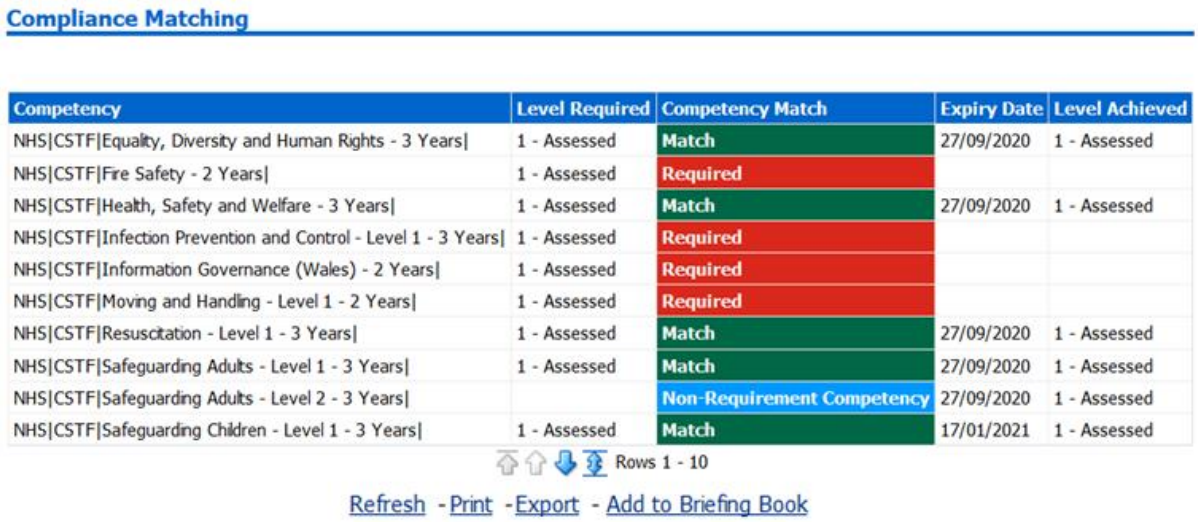
Description

This analysis is designed to show an Employees Compliance Information.

Data Items

Competency	Level Required
Competency Match	Expiry Date
Level Achieved	

Example Screenshot



Compliance Matching

Competency	Level Required	Competency Match	Expiry Date	Level Achieved
NHS|CSTF|Equality, Diversity and Human Rights - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Fire Safety - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Health, Safety and Welfare - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Infection Prevention and Control - Level 1 - 3 Years|	1 - Assessed	Required		
NHS|CSTF|Information Governance (Wales) - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Moving and Handling - Level 1 - 2 Years|	1 - Assessed	Required		
NHS|CSTF|Resuscitation - Level 1 - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Adults - Level 1 - 3 Years|	1 - Assessed	Match	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Adults - Level 2 - 3 Years|		Non-Requirement Competency	27/09/2020	1 - Assessed
NHS|CSTF|Safeguarding Children - Level 1 - 3 Years|	1 - Assessed	Match	17/01/2021	1 - Assessed

Rows 1 - 10

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Enrolments

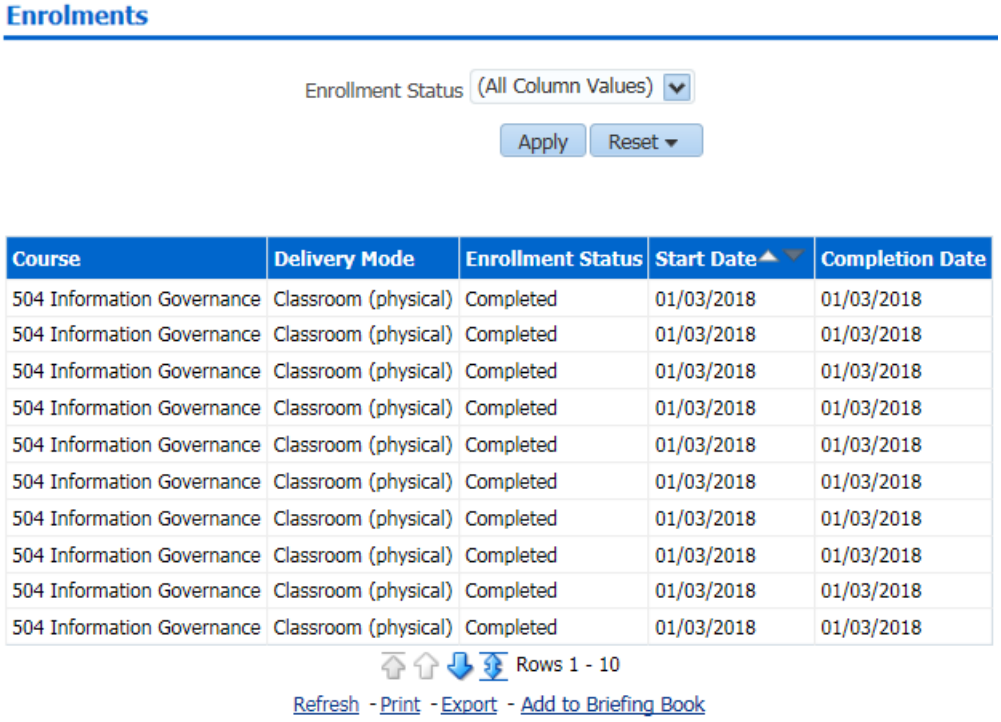
Description

This analysis is designed to show an Employees Enrolment Information.

Data Items

Course	Start Date
Enrolment Status	Completion Date
Delivery Mode	

Example Screenshot



Prompts

Enrolment Status

Actions

None

Certifications

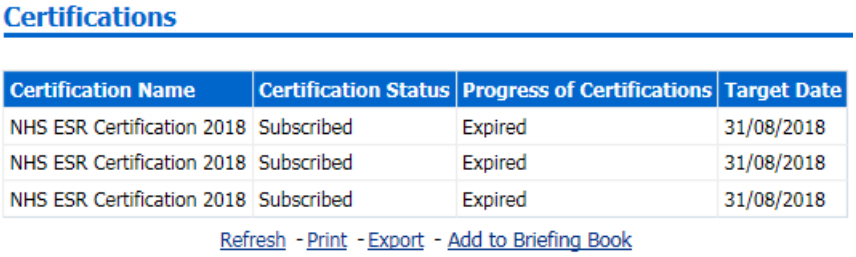
Description

This analysis is designed to show an Employees Certification Details.

Data Items

Certification Name	Progress of Certification
Certification Status	Target Date

Example Screenshot



Certifications

Certification Name	Certification Status	Progress of Certifications	Target Date
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018
NHS ESR Certification 2018	Subscribed	Expired	31/08/2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Learning Paths

Description

This analysis is designed to show an Employees Learning Path Information.

Data Items

Learning Path	Learning Path Completed Courses
Subscription Status	Start Date

Example Screenshot

Learning Path

Learning Path Name	Subscription Status	Learning Path Completed Courses	Start Date
NHS ESR Training	Active	1.0	31-Aug-2018
NHS ESR Training	Active	1.0	31-Aug-2018
NHS ESR Training	Active	1.0	31-Aug-2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Qualifications

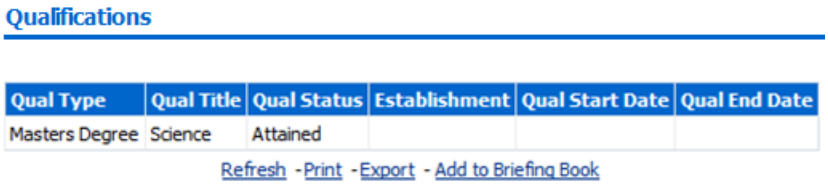
Description

This analysis is designed to show an Employees Qualifications Details.

Data Items

Qualification Type	Qualification Start Date
Qualification Title	Qualification End Date
Establishment	

Example Screenshot



Prompts

None

Actions

None

Objectives

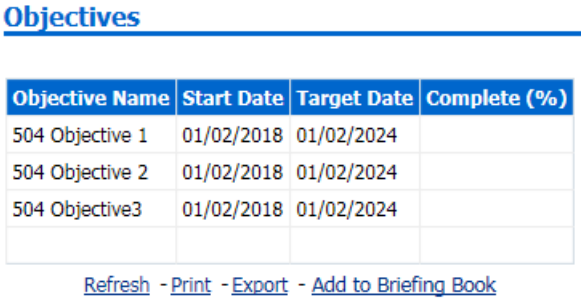
Description

This analysis is designed to show an Employees Objectives Information.

Data Items

Objective Name	Target Date
Start Date	Complete (%)

Example Screenshot



Prompts

None

Actions

None

Previous Employment

Description

This analysis is designed to show an Employees Previous Employment Information.

Data Items

Employer Name	End Date
Start Date	

Example Screenshot

Previous Employment

Employer Name	Start Date	End Date
000 ESR Medical Team	01/01/2018	31/12/2018
000 ESR Medical Team	01/01/2018	31/12/2018
000 NHS Medical Team	01/01/2018	31/12/2018
000 NHS Medical Team	01/01/2018	31/12/2018

Refresh - Print - Export - Add to Briefing Book

Prompts

None

Actions

None

Job History

Description

This analysis is designed to show an Employees Job History.

Data Items

Job Role	Change Date

Example Screenshot

Prompts

None

Actions

None

Did Not Attend Details

Prompts

Organisation(s)
Person Type(s) (Default: Employee, Employee and Applicant)
Job Role
Staff Group
Supplementary Role
Course
Organisation Level 1-13

DNA Rate

Description

This analysis is designed to show the DNA rate of staff in the organisation on a number of courses.

Data Items

Title	Description
Staff Group	Staff group associated with the job role in position
Course Name	Name of the course
Enrolment Count	Number of Enrolments excluding Enrolment Status = 'Withdrawn'
DNA Count	Number of enrolments with status of 'Did Not Attend'

Prompts

Class Date Between (Default between first day of month 3 months ago, and last day of last month)
Enrolment Statuses (Default: Did Not Attend)
DNA Rate Limit % (Default 5)

Filters

Include non-"Online e-Learning" only.
Include enrolments where class start date is between the from and to date Prompts.

Column Selectors

Group by Course or Staff Group (Default: Staff Group).

View Selectors

View as Pie Graph, Bar Graph, Column Graph or Table (Default: Column Graph).

Formatting

Red flag or change colour to red when DNA rate is above the rate set in Prompts.

Example Screenshot

Future Enrolments

Description

This analysis is designed to show a list of staff enrolled on courses with future class start dates in the period. Default: between current date and last day of next month.

Prompts

Class Start Date Between

Data Items

Employee Name
Organisation Name
Course Name
Class Start Date

Filters

Restrict to classes occurring within the next month (prompt is available to update this).

DNA Detail

Description

This tab is designed to give users the details of each enrolment. By default the data is restricted to 'DNA' enrolments only, however users can change this using the prompt provided.

Actions

Click -> Employee Email Address or Supervisor Email Address to generate email template

Data Items

Employee Number	Supervisor Name
Course Name	Supervisor Email Address
First Name	Supervisor Employee Number
Last Name	Enrolment Status
Email Address	Class Start Date
Position Title	Class End Date
Organisation	Change Reason
Organisation Level1-13	Enrolment ID
Staff Group	

OLM Data Group Staff List

Description

The OLM Data Group Staff List detail analysis returns a list of employees who are a member of any of the three OLM Data Groups created in ESR.

Data Items

Employee Number	Assignment Category
Assignment Number	Assignment Status
Last Name	Primary Assignment
First Name	Pay Scale
Title	FTE
Staff Group	Pay Step Date
Role	Fixed Term End Date
Occupation Code	Fixed Term End Reason
Position Number	Work at Home Flag
Position Title	OLM Data Group 1
Area Of Work	OLM Data Group 2
Organisation Name	OLM Data Group 3

Prompts

Organisation(s)
Staff Group(s)
Assignment Category(s) (Multi-select: default: exclude Bank, External Learner, Honorary and Locum)
Person Type(s) (Multi-select: default: Employee, Employee and Applicant)

Employee Person Type(s) (Multi-select: default: Employee, Employee and Applicant)
Assignment Status (Multi-select: default: exclude External Learner, Terminate Assignment and Terminate Process Assignment)
Occupation Code
Job Role
Pay Grade(s)
Job Sharer
Primary Assignments Only
Effective Date
Organisation Level 1-13
Cost Centre Org Level 1-12

Column Selector

Organisation Level 1-13
Cost Centre Org L1-12

Example Screenshot

Assignment Category	Assignment Status	Primary	Pay Scale	FTE	Pay Step Date	Fixed Term End Date	Fixed Term End Reason	Work at Home Flag	OLM Data Group 1	OLM Data Group 2	OLM Data Group 3
Permanent	Active Assignment	Y	XR07	0.67	15/12/2019			N	000 VCC Clinical Nursing	000 VCC Blood Fridge Access	
Permanent	Active Assignment	Y	XR06	1.00	23/02/2025			N	000 VCC Clinical Nursing		
Permanent	Active Assignment	Y	XR02	1.00	04/03/2025			N	000 VCC Clinical Nursing		
Permanent	Active Assignment	Y	XR08	1.00	02/06/2025			N	000 VCC Clinical Nursing		
Permanent	Active Assignment	Y	XR04	1.00	22/11/2024			N	000 WBS Clinical Training		
Permanent	Active Assignment	Y	XR08	1.00	09/01/2025			N	000 VCC Radiation		
Fixed Term Temp	Active Assignment	Y	XR07	0.40	04/09/2024	31/03/2024	Limited Term Project	N	000 Safeguarding		
Permanent	Active Assignment	Y	XR05	1.00	11/03/2025			N	000 People Management		
Permanent	Active Assignment	Y	XR10	1.00	13/03/2025			Y	000 Safeguarding		
Permanent	Active Assignment	Y	XR07	1.00	20/09/2025			N	000 VCC Clinical Nursing	000 VCC Radiation	000 VCC Blood Fridge Access
Fixed Term Temp	Active Assignment	Y	XR05	1.00	01/09/2025	31/03/2024	Covering Maternity Leave	N	000 People Management		
Permanent	Active Assignment	Y	XR04	0.80	23/04/2019			Y	000 WBS Clinical Training		
Permanent	Active Assignment	Y	XR04	1.00	05/10/2024			Y	000 WBS Clinical Training		
Permanent	Active Assignment	Y	XR06	1.00	01/03/2025			N	000 Health & Safety		

Cost of Learning

Description

The Cost of Learning analysis is designed to return the total cost of training completed based on the hourly rate of a delegate's primary assignment, taking into account the time taken to complete the training.

Users are able to calculate the predicted cost over a number of years where the time period and renewal frequency is defined by the user.

Data Items

Title	Description
Course	
Class Start Date	
Number of Delegates	
Estimated Time Taken (Hours)	The average time taken as defined in the prompt.
Total Time to Complete Training (Hours)	Avg. Time to Complete Training (Mins) * Number of Delegates. Example calculation available on the dashboard.
Hourly Rate (All Delegates)	The combined hourly rate of all delegates.

Total Cost	combined hourly rate * Time to Complete Training (Hours).
Predicted Cost	The predicted cost of training over a number of years, defined by the user.

Prompts

Course
* Class
Enrolment Status
Date Between
Organisation(s)
Staff Group
Role
Session Multiplier
Avg. Time to Complete Training (Mins)
Projected Cost over X Years where X is
Renewal Frequency is every X Years where X is

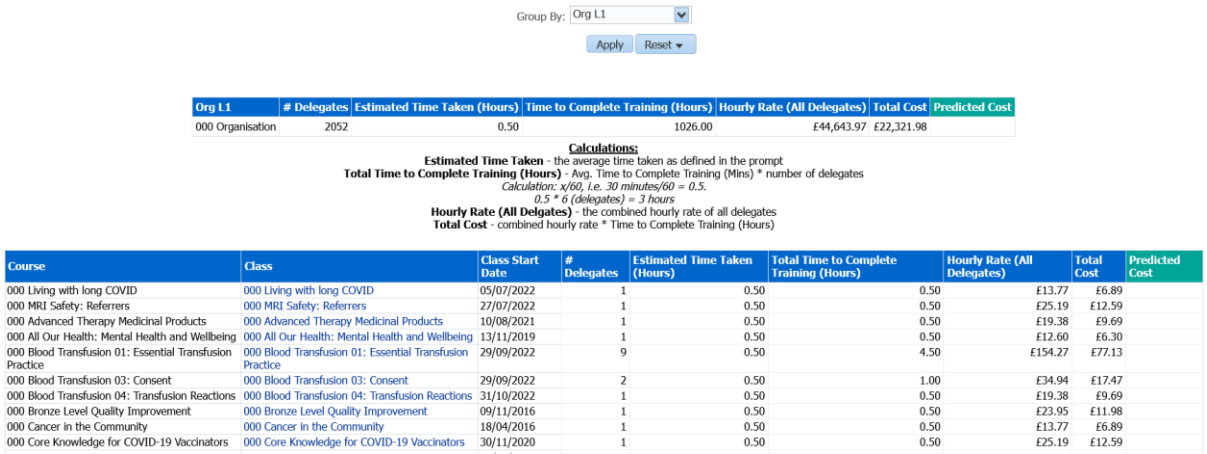
Column Selector

Organisation Level 1-13
Organisation
Staff Group
Job Role

Actions

Click -> Class to navigate to the Class Delegate List. Please note that this may return more delegates than the number shown on this analysis.

Example Screenshot



Org L1	# Delegates	Estimated Time Taken (Hours)	Time to Complete Training (Hours)	Hourly Rate (All Delegates)	Total Cost	Predicted Cost
000 Organisation	2052	0.50	1026.00	£44,643.97	£22,321.98	

Calculations:
Estimated Time Taken - the average time taken as defined in the prompt
Total Time to Complete Training (Hours) - Avg. Time to Complete Training (Mins) * number of delegates
Calculation: x/60, i.e. 30 minutes/60 = 0.5.
*0.5 * 6 (delegates) = 3 hours*
Hourly Rate (All Delgates) - the combined hourly rate of all delegates
Total Cost - combined hourly rate * Time to Complete Training (Hours)

Course	Class	Class Start Date	# Delegates	Estimated Time Taken (Hours)	Total Time to Complete Training (Hours)	Hourly Rate (All Delegates)	Total Cost	Predicted Cost
000 Living with long COVID	000 Living with long COVID	05/07/2022	1	0.50	0.50	£13.77	£6.89	
000 MRI Safety: Referrers	000 MRI Safety: Referrers	27/07/2022	1	0.50	0.50	£25.19	£12.59	
000 Advanced Therapy Medicinal Products	000 Advanced Therapy Medicinal Products	10/08/2021	1	0.50	0.50	£19.38	£9.69	
000 All Our Health: Mental Health and Wellbeing	000 All Our Health: Mental Health and Wellbeing	13/11/2019	1	0.50	0.50	£12.60	£6.30	
000 Blood Transfusion 01: Essential Transfusion Practice	000 Blood Transfusion 01: Essential Transfusion Practice	29/09/2022	9	0.50	4.50	£154.27	£77.13	
000 Blood Transfusion 03: Consent	000 Blood Transfusion 03: Consent	29/09/2022	2	0.50	1.00	£34.94	£17.47	
000 Blood Transfusion 04: Transfusion Reactions	000 Blood Transfusion 04: Transfusion Reactions	31/10/2022	1	0.50	0.50	£19.38	£9.69	
000 Bronze Level Quality Improvement	000 Bronze Level Quality Improvement	09/11/2016	1	0.50	0.50	£23.95	£11.98	
000 Cancer in the Community	000 Cancer in the Community	18/04/2016	1	0.50	0.50	£13.77	£6.89	
000 Core Knowledge for COVID-19 Vaccinators	000 Core Knowledge for COVID-19 Vaccinators	30/11/2020	1	0.50	0.50	£25.19	£12.59	

Data Quality

Description

Available on this tab are analyses designed to help users identify learning related data quality issues.

Prompts

Course(s)
Delivery Mode
Enrolment Status
Organisation
Staff Group
Person Type
Delegate Name is LIKE (pattern match)
Employee Number
* Class Date Between

Employees booked on two or more classes in the same offering

Description

This analysis is designed to show the details of those employees booked on two or more classes in the same offering.

Data Items

Employee Number	Offering Name
Delegate Name	Class
Email	Enrolment Status
Telephone	

Example Screenshot

Employees booked on two or more classes in the same offering

Employee Number	Delegate Name	Email	Telephone	Offering Name	Class	Enrollment Status
01234567	Blogs, Mrs. Jo	jo.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mrs. Jo	jo.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Waitlisted
12345678	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed
	Blogs, Mr. Joe	joe.blogs@nhs.net	01234 567890	000 ESR Information Governance	000 ESR Information Governance: ESR House, 29/11/2019	Confirmed

Rows 1 - 10

Refresh - Print - Export - Add to Briefing Book

Class Enrolment End Date is greater than Class End Date or is Null

Description

This analysis is designed to show Classes where a Class Enrolment End Date is greater than Class End Date or is null.

Data Items

Class	Enrolment Start Date
Start Date	Enrolment End Date
End Date	

Example Screenshot

Class Enrolment End Date is greater than Class End Date or is Null

Class	Start Date	End Date	Enrolment Start Date	Enrolment End Date
000 14th April 2025	14/04/2025	14/04/2025	13/04/2025	24/04/2025
000 Adult Resuscitation Opt Out Level 1 and 2 Non Medical April 2025	01/04/2025	01/04/2025	01/04/2025	30/04/2025
000 Adult Resuscitation Training Level 1 - April 2025	01/04/2025	01/04/2025	01/04/2025	
000 Adult Resuscitation Training Level 2 Medical - April 2025	01/04/2025	01/04/2025	01/04/2025	
000 Adult Resuscitation Training Level 2 Non-Medical - April 2025	01/04/2025	01/04/2025	01/04/2025	
000 Asepsis Assessments April 2025	01/04/2025	30/04/2025	01/04/2024	
000 E&F Food Safety Refresher - April 2025	01/04/2025	01/04/2025	20/03/2025	
000 E&F Swallowing Awareness - April 2025	01/04/2025	01/04/2025	20/03/2025	
000 Food Safety Level 1 - April 2025	01/04/2025	01/04/2025	20/03/2025	
000 IPP for Facilities Technicians - 01 April 2025	01/04/2025	01/04/2025	01/04/2025	05/04/2025

Rows 1 - 10

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