

NHS ELECTRONIC STAFF RECORD

ESR-NHS0263 - GUIDE TO ESRBI CERTIFICATIONS ANALYSIS DASHBOARD

Information Classification: PUBLIC

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Creation Date: September 2017
Last Updated: February 2024
Version: 6.0

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DOCUMENT CONTROL

CHANGE RECORD

Date	Author	Version	Change Reference
09/10/2017	Chris Holroyd	0.1	Initial draft
10/10/2017	Matt Madya	1.0	Initial Release
02/12/2019	Matt Madya	2.0	Removed the restricted classification. No change to content.
22/03/2021	Matt Madya	3.0	Annual Review
01/04/2022	Matt Madya	4.0	Annual Review
27/10/2023	Matt Madya	5.0	Annual Review
01/02/2024	Matt Madya	6.0	Updated following new ESRBI developments

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DISTRIBUTION

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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.

Certifications Analysis Dashboard

Description

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.

Allocation

This dashboard is available to the following URPs:

XXX BI Administration

XXX Learning Administration

XXX Administrator Self Service (Payroll Approvals Not Required) *(Excludes Certification Details)*

XXX Administrator Self Service (Payroll Approvals Required) *(Excludes Certification Details)*

XXX Manager Self Service (Payroll Approvals Not Required) *(Excludes Certification Details)*

XXX Manager Self Service (Payroll Approvals Required) *(Excludes Certification Details)*

XXX Supervisor Self Service *(Excludes Certification Details)*

XXX Supervisor Self Service (Limited Access) *(Excludes Certification Details)*

Prompts

Organisation

Employee Number

Delegate Name is LIKE

Role

Staff Group

Assignment Category

Assignment Status

Person Type

Occupation Code

Delegate Status on Certification

Description

This report 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.

Data Items

Delegate Name	Assignment Number
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

Prompts

Effective Date
 Certification Name
 Course

View Selector

None

Example Screenshot

The screenshot shows the 'NHS Certifications Analysis Dashboard' with the 'Delegate Status on Certification' report selected. The dashboard includes a navigation bar with 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As'. Below the navigation bar, there are tabs for 'Course Compliance', 'Certification History', and 'Certification Details'. The main content area is titled 'NHS Electronic Staff Record - Business Intelligence' and contains a search and filter section with various dropdown menus and input fields. Below this, there is a table with the following data:

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

Course Compliance

Description

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

Data Items

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

Prompts

Effective Date

Certification Name

Course

View Selector

None

Example Screenshot

The screenshot displays the NHS Certifications Analysis Dashboard. The main content area shows the 'Course Compliance' report. The dashboard includes a navigation bar at the top with options like Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As. Below the navigation bar, there are tabs for Delegate Status on Certification, Course Compliance (selected), Certification History, and Certification Details. The report title is 'NHS Electronic Staff Record - Business Intelligence'. The filter section includes dropdown menus for Organisation Name, Employee Number, Delegate Name (with a LIKE pattern match input), Role, Staff Group, Assignment Category, Person Type, Occupation Code, and Assignment Status. There is also an Effective Date field set to 06/10/2017 and a Certification Name dropdown. The data table below has 16 columns and 4 rows of data.

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	Cancelled	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	000 ESR Awareness	Cancelled	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	000 ESR Awareness	Completed	Completed	Completed	18/07/2017	16/10/2017	18/07/2017	16/10/2017		

Certification History

Description

Report 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.

Data Items

Delegate Name	Position Title
Employee Number	Organisation
Job Role	Course Name
Certification Name	Certification Progress
Course Status	Performance Status
Enrolment Date	Target Date
Certified Date	Certification Period Start Date
Certification Period End Date	Renewal Period
Renewal Due	

Prompts

Enrollment Date Between

Certification Name

Course

View Selector

None

Example Screenshot

The screenshot displays the 'NHS Certifications Analysis Dashboard' with the 'Certification History' report selected. The dashboard features a search and filter section with various dropdown menus and text input fields. Below the filters is a data table with the following columns: 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, and Renewal Period. The table contains three rows of data for 'Blogs, Mr. Joe', with the first row showing 'Canceled' progress and the other two rows showing 'Completed' progress.

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	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	000 ESR Awareness	000 ESR Awareness	Completed	Completed	Completed	17/04/2017	17/05/2017	27/04/2017	17/04/2017	17/05/2017		27/04/2017
Blogs, Mr. Joe	00000000	Management Senior Manager	000 ESR Organisation	000 ESR Awareness	000 ESR Awareness	000 ESR Awareness	Completed	Completed	Completed	27/04/2017	27/05/2017	27/04/2017	27/04/2017	27/05/2017		27/04/2017

Certification Details

Description

Report is designed to provide the details of each certification that is available within the OLM Catalogue.

Data Items

Certification Name	Start Date
End Date	Target Days
Renewal Period (Days)	Validity Period
Validity Period Starts From	Course Name
Certification Competence Name	Certification Competence Level Achieved
Created By	Last Updated By
Created Date	Last Updated Date
Learning Certification Competency Update Setting	Auto Enrol Opt Out

Prompts

Certification Name

Certification Competence Name

Certification Competence Level Attached

Created By

Course

View Selector

None

Example Screenshot

The screenshot shows the 'NHS Certifications Analysis Dashboard' with the 'Certification Details' tab selected. The dashboard title is 'NHS Electronic Staff Record - Business Intelligence'. Below the title, there are search filters for Effective Date (06/10/2017), Certification Name, Course, Certification Competence Name, Certification Competency Level Attached, and Created By. There are 'Apply' and 'Reset' buttons. Below the filters is a table with the following data:

Certification Name	Start Date	End Date	Target Days	Renewal Period (Days)	Validity Period	Validity Period Starts From	Course Name	Certification Competence 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		000JBlogs01 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		000JBlogs01 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	000JBlogs01 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		000JBlogs01 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		000JBlogs01 Blogs, Mr. Joe