

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

Approvals:

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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

REVIEWERS

Name	Position
Charlotte Hampton	Assistant Development Advisor - BI
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DISTRIBUTION

Copy No.	Name	Location
1	Library Master	Project Library
2		

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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

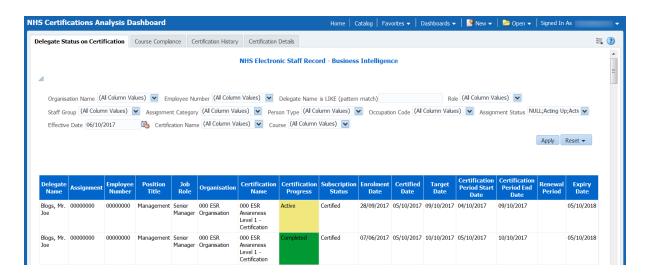
Delegate Name	Assignment Number
Employee Number	Position Title
Job Role	Organisation
Certification Name	Certification Progress
Subscription Status	Enrolment Date
Certified Date	Target Date
Certification Period Start Date	Certification Period End Date
Renewal Period	Expiry Date

Prompts

Effective Date
Certification Name
Course

View Selector

None



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

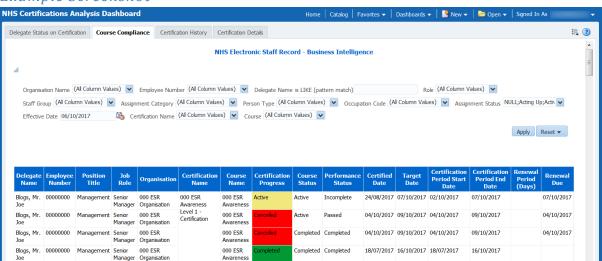
Delegate Name	Employee Number
Position Title	Job Role
Organisation	Certification Name
Course Name	Certification Progress
Course Status	Performance Status
Certified Date	Target Date
Certification Period Start Date	Certification Period End Date
Renewal Period (Days)	Renewal Due

Prompts

Effective Date
Certification Name
Course

View Selector

None



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

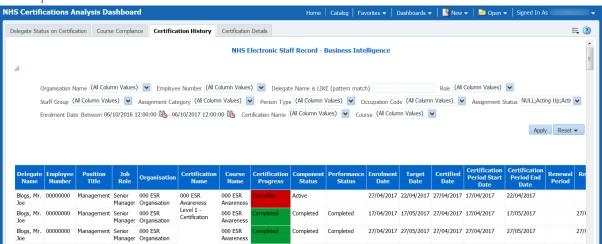
Enrollment Date Between

Certification Name

Course

View Selector

None



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

