

# NHS ELECTRONIC STAFF RECORD

## ESR-NHS0264 - GUIDE TO ESRBI EDUCATION AND LEARNING DASHBOARD

Information Classification: PUBLIC

Owner:	Development and Operations Team
Author:	Matt Madya
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### Approvals:

Name	Lee Pacey
Title	Director of Development & Operations

# 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
02/05/2018	Matt Madya	2.0	Updated following R38
01/10/2018	Matt Madya	3.0	Updated following new ESRBI developments
14/01/2019	Matt Madya	4.0	Updated following new ESRBI developments
27/02/2019	Matt Madya	5.0	Updated following new ESRBI developments
02/12/2019	Matt Madya	6.0	Removed the restricted classification. No change to content.
04/02/2020	Matt Madya	7.0	Updated following new ESRBI developments
22/03/2021	Matt Madya	8.0	Annual Review
01/04/2022	Matt Madya	9.0	Annual Review
27/10/2023	Matt Madya	10.0	Annual Review

## REVIEWERS

Name	Position
Charlotte Hampton	Assistant Development Advisor - BI
Chris Holroyd	Development Advisor - BI
James Haddon	Senior Development Advisor - BI, Reporting & Data Analysis
Sam Wright	Development Advisor - Workforce Information & Quality
Kieron Walsh	Senior Development Advisor - Workforce Information & Quality

## 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.

## Education and Learning Dashboard

### *Description*

This dashboard is designed to provide the user with intelligence around Education and Learning that is applicable to Managers and Learning Administrators.

### *Allocation*

This dashboard is available to the following URPs:

XXX Administrator Self Service (Payroll Approvals Not Required)  
XXX Administrator Self Service (Payroll Approvals Required)  
XXX BI Administration  
XXX HR Administration  
XXX HR Administration (With RA)  
XXX Recruitment & Applicant Enrolment Administration  
XXX Recruitment & Applicant Enrolment Administration (With RA)  
XXX Learning Administration  
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)

### *Prompts*

Course  
Delivery Mode  
Delegate Name is LIKE  
Employee Number  
Person Type  
Organisation  
Category  
Sub-Category  
Staff Group  
Job Role  
Learner Group  
Enrolment Status  
Organisation Level 1-13

## Learning Record (Internal Delegates)

### Description

This analysis provides users with information regarding classes attended for internal delegates only: This analysis displays assignment details as at the report run date (as opposed to assignment details as at the class date used by the All Delegates version of this analysis available within the NHS Learning Administration Dashboard).

### Data Items

Delegate Name	Employee Number
Organisation	Staff Group
Supervisor	Category
Sub-Category	Class Name
Delivery Mode	Class Start Date
Course	Duation
Date Placed	Enrollment Status
Status Changed By	Date Status Changed
In Certification	Actual Termination Date
Supplier	Cost Student (£)
Person Type	e-Learning Completion Date
Cost External (£)	Player Time
Date First Played	Score
Player Status	Enrollment ID
Mastery Score	Moved to History
Special Requirements	External Learning Flag
Class Cancellation Reason	Completion Date

### Prompts

Learner Group  
External Learning  
Date Between

### View Selector

None

### Example Screenshot

**NHS Education and Learning Dashboard** Home Catalog Favorites Dashboards New Open Signed In As

**Learning Record (Internal Delegates)** Candidate Status on Class Player Detail

**NHS Electronic Staff Record - Business Intelligence**

Course(s) --Select Value-- Delivery Mode --Select Value-- Delegate Name is LIKE (pattern match) Employee Number --Select Value-- Person Type --Select Value--  
 Organisation --Select Value-- Customer --Select Value-- Staff Group --Select Value-- Category --Select Value-- Sub-Category --Select Value-- Learner Group --Select Value--  
 External Learning --Sele \* Date Between 01/09/2017 12:00:00 - 05/10/2017 12:00:00

Apply Re

Delegate Name	Employee Number	Organisation	Staff Group	Supervisor	Category	Sub-Category	Class Name	Delivery Mode	Class Start Date	Course
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Customer Relations	Equality & Diversity	000 ESR Awareness Level 1	Online e-Learning	04/08/2016	000 NHS ESR - Rai
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Customer Relations	Equality & Diversity	000 ESR Awareness Level 1	Online e-Learning	04/08/2016	000 NHS ESR - Rai
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Customer Relations	Equality & Diversity	000 ESR Awareness Level 1	Online e-Learning	04/08/2016	000 NHS ESR - Rai
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Customer Relations	Equality & Diversity	000 ESR Awareness Level 1	Online e-Learning	04/08/2016	000 NHS ESR - Rai
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Customer Relations	Equality & Diversity	000 ESR Awareness Level 1	Online e-Learning	05/04/2017	000 NHS ESR - Rai
Blogs, Mr. Joe	00000000	000 ESR Organisation	Add Prof Scientific and Technic	Blogs, Mrs. Jo	Health & Safety	Fre Training	000 ESR Awareness Level 1	Classroom	18/09/2017	000 NHS ESR - Rai

## Candidate Status on Class

### Description

The Candidate Status on Class report provides Managers/HR Teams/Class Trainers to determine the candidate status on a particular class.

### Data Items

Category	Org L1-13
Course	Sub-Category
Title	Delivery Mode
Cancellation Reason	Class Status
Training Centre	Start Date
Employee Number	Delegate Name
Person Type	Organisation
Staff Group	Job Role
Customer	Date Placed
Enrollment Status	In Certification
Status Changed By	Date Status Changed
Change Reason	Contact Name
Telephone	Email
Date First Played	Player Status
Score	Player Time
Places	Enrollment ID
Organisation	Offering Name

### Prompts

- Class
- Enrollment Status
- Class Status
- Training Centre
- Class Date Between
- Assignment Category
- Assignment Status

## View Selector

None

## Column Selectors

Organisation Levels 1-13 (x 4)

## Example Screenshot

**NHS Education and Learning Dashboard**

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

Learning Record (Internal Delegates) | **Candidate Status on Class** | Player Detail

### NHS Electronic Staff Record - Business Intelligence

Course --Select Value-- | Delivery Mode --Select Value-- | Class --Select Value-- | Enrollment Status --Select Value-- | Employee Number --Select Value-- | Delegate Name --Select Value--

Class Status --Select Value-- | Category --Select Value-- | Sub-Category --Select Value-- | Organisation(s) --Select Value-- | Staff Group --Select Value--

Job Role(s) --Select Value-- | Assignment Category --Select Value-- | Assignment Status --Select Value-- | Training Center --Select Value-- | Learner Group --Select Value--

\* Class Date Between 01/10/2017 12:00:00 - 30/11/2017 12:00:00

Next Apply

Category	Sub-Category	Course	Delivery Mode	Title	Class Status	Cancellation Reason	Start Date	Training Center	Delegate Name	Employee Number
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Cancelled	Trainer Unavailable	06/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Cancelled	Trainer Unavailable	06/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Cancelled	Trainer Unavailable	06/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Cancelled	Trainer Unavailable	06/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Cancelled	Trainer Unavailable	06/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000
Customer Relations		000 ESR Awareness	Classroom	000 NHS ESR - Raising Awareness - Level 1	Full		16/10/2017	000 ESR Training Centre	Blogs, Mr. Joe	00000000



## Player Detail

### Description

The Player Detail Analysis report provides Learning Administrators and Managers with details of each player's performance against each Learning Object within a Course.

### Data Items

Last Name	First Name
Title	Person Type
Employee Number	Assignment Number
Applicant Number	Local/STC
Staff Group	Role
Organisation	Category
Course	Date Placed
In Certification	Class End Date
Learning Objects	Number of Attempts
Enrollment Status	Player Status
Mastery Score	Score
Player Time	Date First Played
Completion Date	Enrollment ID

### Prompts

Date Between  
Primary Category

### View Selector

None

### Example Screenshot

The screenshot displays the 'Player Detail' report within the NHS Education and Learning Dashboard. The interface 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 'Learning Record (Internal Delegates)', 'Candidate Status on Class', and 'Player Detail'. The main content area shows a search filter section with various dropdown menus for Date, Course(s), Delegate Name, Employee Number, Person Type, Organisation, Staff Group, Primary Category, and Learner Group. Below the filter section is a table with the following columns: Last Name, First Name, Title, Person Type, Employee Number, Assignment Number, Applicant Number, Local / STC, Staff Group, Role, Organisation, Category, and Course. The table contains several rows of data for a player named 'Blogs, Joe, Mr' with various roles and assignments.

Last Name	First Name	Title	Person Type	Employee Number	Assignment Number	Applicant Number	Local / STC	Staff Group	Role	Organisation	Category	Course
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Health & Safety	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Health & Safety	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Risk Management	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Risk Management	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Risk Management	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Clinical Psychologist	000 ESR Organisation	Risk Management	000 NHS ESR - Raising
Blogs	Joe	Mr	Employee	00000000	00000000	00000000	Local	Add Prof Scientific and Techn	Pharmacist	000 ESR Organisation	Customer Relations	000 NHS ESR - Raising