NHS

ESR Business Intelligence

Alerting

The ESR BI Alert functionality enables users to deliver alerts to the ESR BI Homepage/Dashboard and (or) directly to an employee's email address. An ESR BI Agent can be designed to deliver alerts which can be used to monitor changes in key workforce areas such as Absence and Compliance. For example, an ESR BI Agent can be setup to deliver alerts to managers when their team Absence rate has exceeded a set target e.g. 10%.

Benefits of using Alerting within ESRBI include the ability to quickly and directly target problem or well performing business areas, make fast and accurate decisions, enable users to subscribe or unsubscribe from alerts as required and have output delivered directly to users via email.

ESR BI Agent

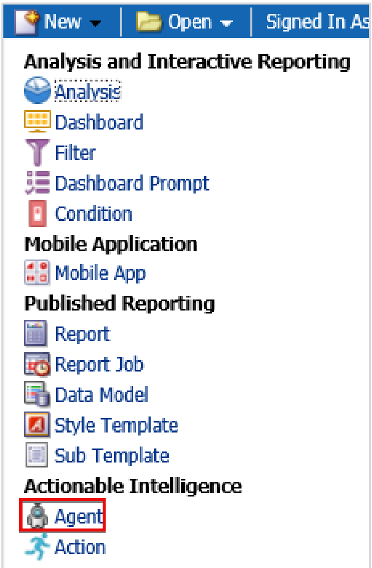
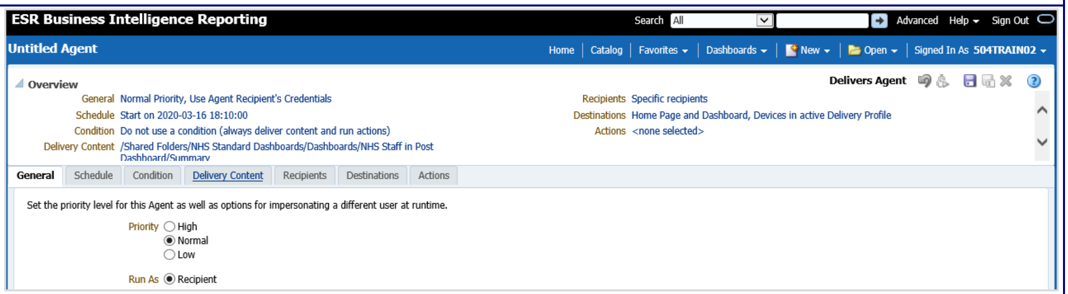
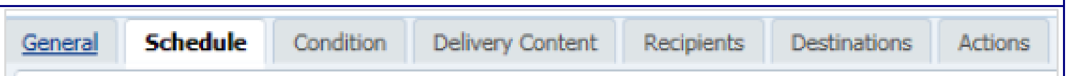
ESR BI Alerts requires ESR BI Agents to deliver them. Local BI Administrators can create BI Agents which can deliver limited parts of analyses or dashboard pages as alerts to the ESR BI Homepage/Dashboard and (or) to an email address. Local BI Administrators can create BI Agents for both local and national analyses/dashboards. BI Agents can run to a defined schedule and can be delivered to a list of recipients or can be set up to allow subscribers. A recipient or subscriber can be any BI User within the Organisation of the Local BI Administrator who created the BI Agent.

Important: For security reasons the ESR BI Alert functionality is not designed to be used for scheduling or to deliver large reports (greater than 75 rows). Users are advised to use ESR BI Publisher instead, a guide is available within the Reporting folder on the ESR Hub on how to create and publish reports using BI Publisher.

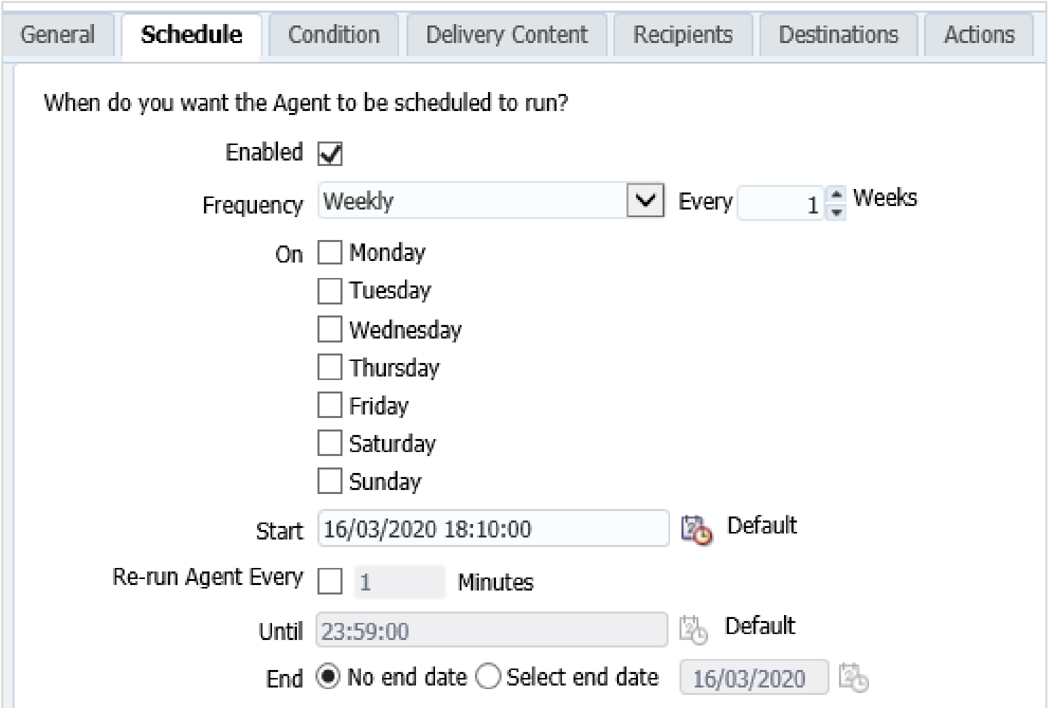
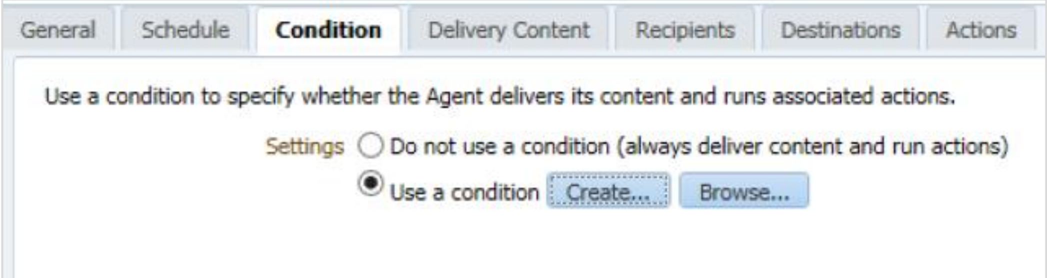
Please be advised that Agent queues will be monitored to ensure agents have not been setup incorrectly, for example to run reports continually (e.g. every 5 minutes). Where an alert is at risk of affecting the ESR BI service, it may be terminated centrally.

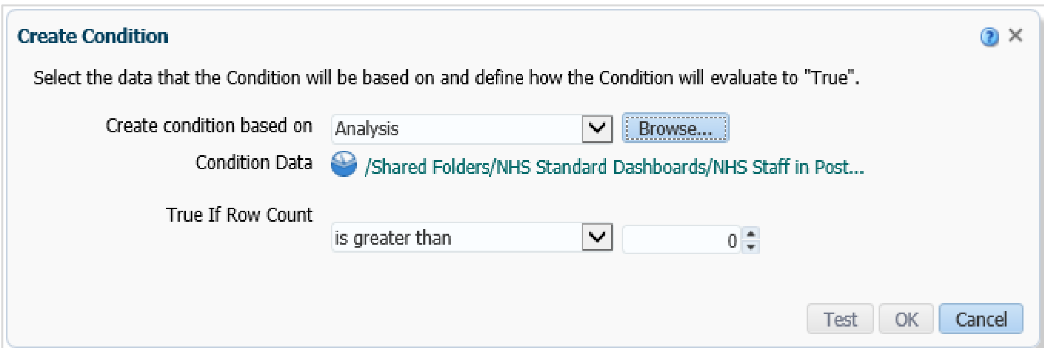
Creating an ESR BI Agent

Users wishing to create an ESR BI Agent can follow the below Steps and Actions which provide step-by-step guidance from start to completion:

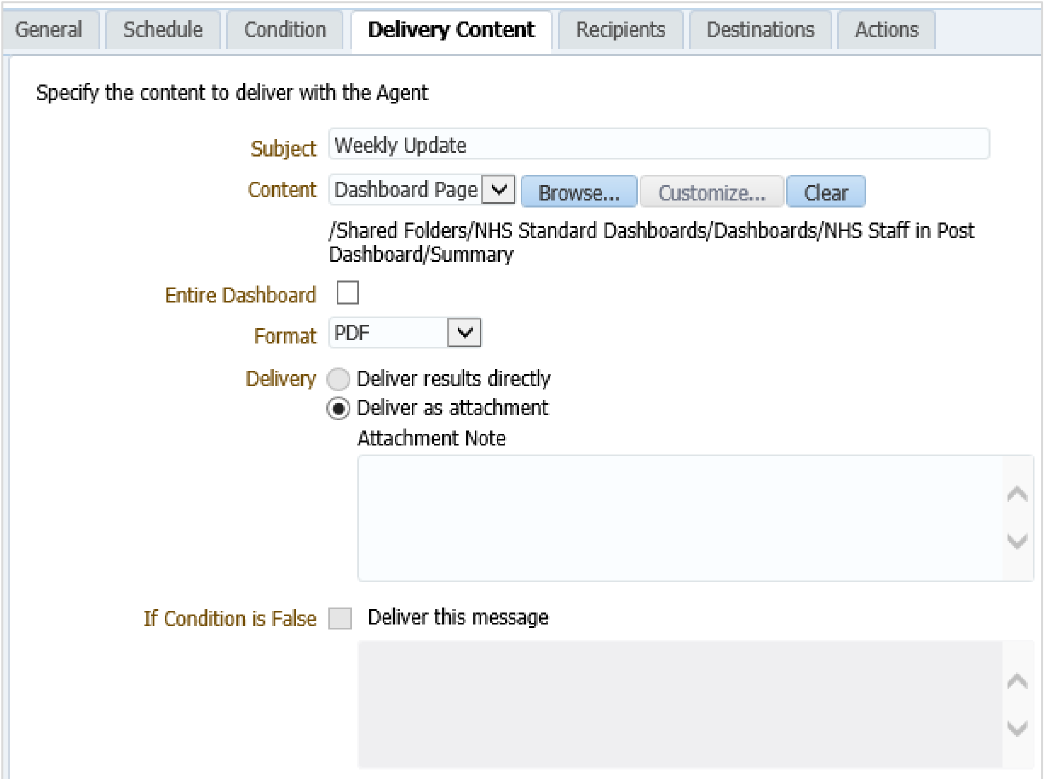
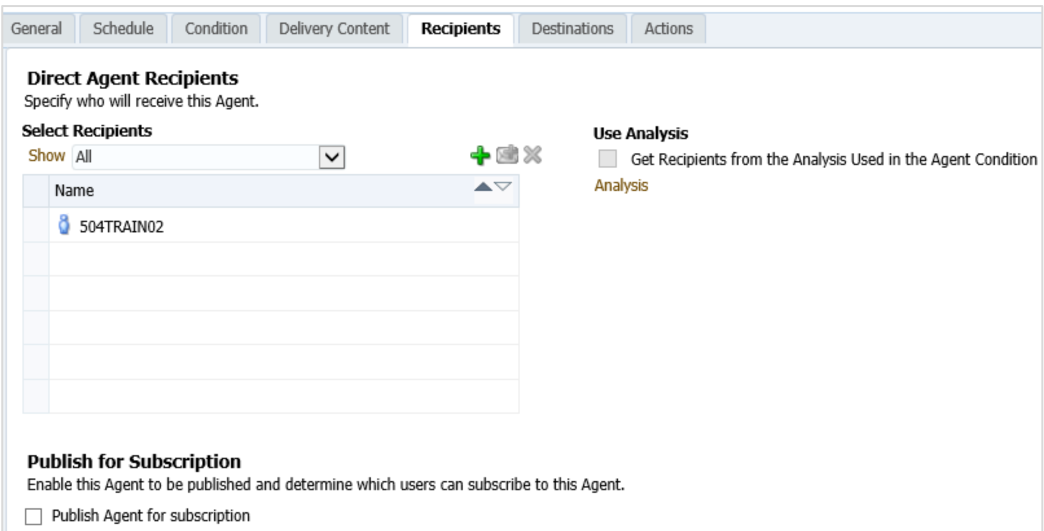
Step / Action	**Example Screen / Action Description**
1	
Action 1	Click the New dropdown arrow in the header and select 'Agent'.
2	
Action 2	Click on the General tab to define a Priority for the Agent as required (High, Normal (Default) and Low). ******Please note that the 'Run As' field will default to Recipient and cannot be amended*. ******Please note also that it is not possible to create an Agent that will run as any other user other than the recipient (or subscriber of the Agent).*
3	
Action 3	Depending on when you want the Agent to be scheduled for (Once, Daily, Weekly or Monthly), click on the Schedule tab to specify a schedule that

<table>
<tr><td></td><td>the Agent will run with – a Weekly example is given below:


</td></tr>
<tr><td>4</td><td>
</td></tr>
<tr><td>Action 4</td><td>Conditions can be added to the Agent that will be evaluated and used to decide whether content is delivered to a recipient – an example is given below:



*Please note that an Agent can only contain one condition.</td></tr>
</table>

5	
Action 5	Delivery formats available are HTML, PDF, Excel, CSV and text. Click on the Delivery Content tab to define where results can be delivered directly to. This can be to the BI Homepage or as an email attachment. *****_Please note that the delivery content of the Agent will need to be saved in a shared / public folder to enable subscribers / recipients (covered in Step 6) to access it when viewing alerts delivered to them._
6	
Action 6	By default, the alert will be sent to the user logged in however this can be removed if not required. Further recipients can be created by selecting

individual Users or by using Application Roles.

******Please note that the VPD will be displayed by default as this is required and cannot be removed.*

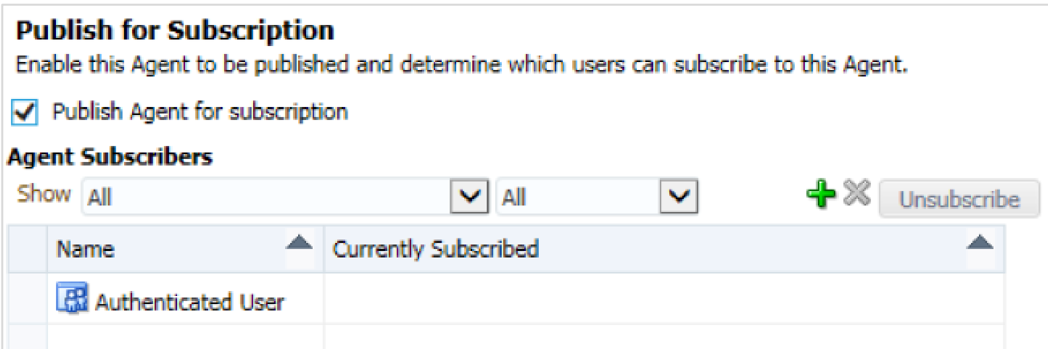
******Please note also that it is not possible to add email addresses as recipients.*

When an Agent runs it runs for the individual user (recipient). The Agent content delivered will therefore be relative to the user's access to ESR. For example an Agent delivered to a BI Administrator will contain information for the Employing Authority whereas the same Agent delivered to a Manager will only contain information for their supervisor hierarchy.

The above 'Get Recipients from the Analysis Used in the Agent Condition' checkbox can be checked to specify whether recipients are to be determined dynamically from the results of a conditional analysis. Or unchecked (default) to have the recipients determined from the Select Recipients area.

******Please note that this option will only be available (selectable) where an agent has been set up to alert based on a condition.*

The 'Publish for Subscription' region enables you to create an Agent to which users can subscribe – an example is given below:



By ticking the above 'Publish Agent for subscription' checkbox, users are able to define who can subscribe to the Agent. The default is 'Authenticated User' which
allows any user within your Employing Authority to subscribe. Alternatively
this can be defined by User or Application Role – an example is given below:

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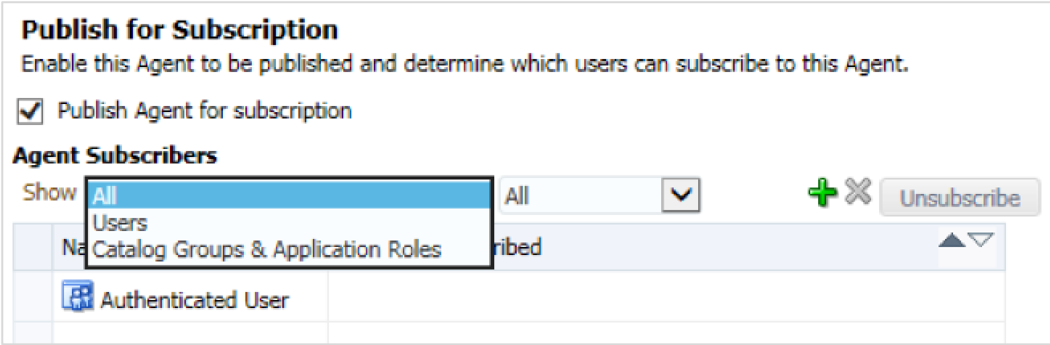

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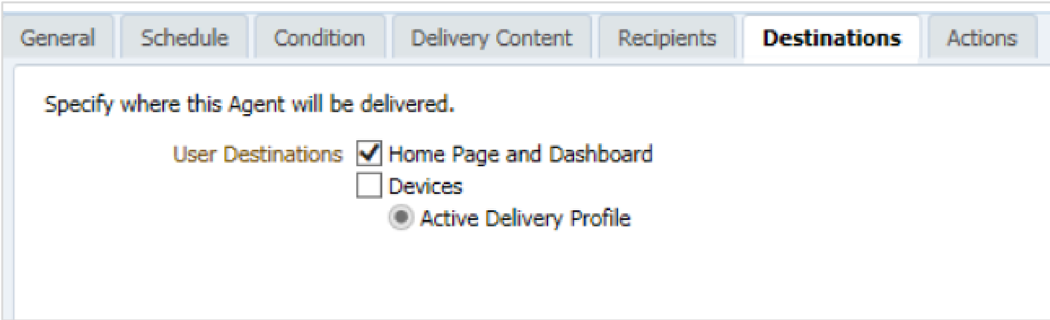
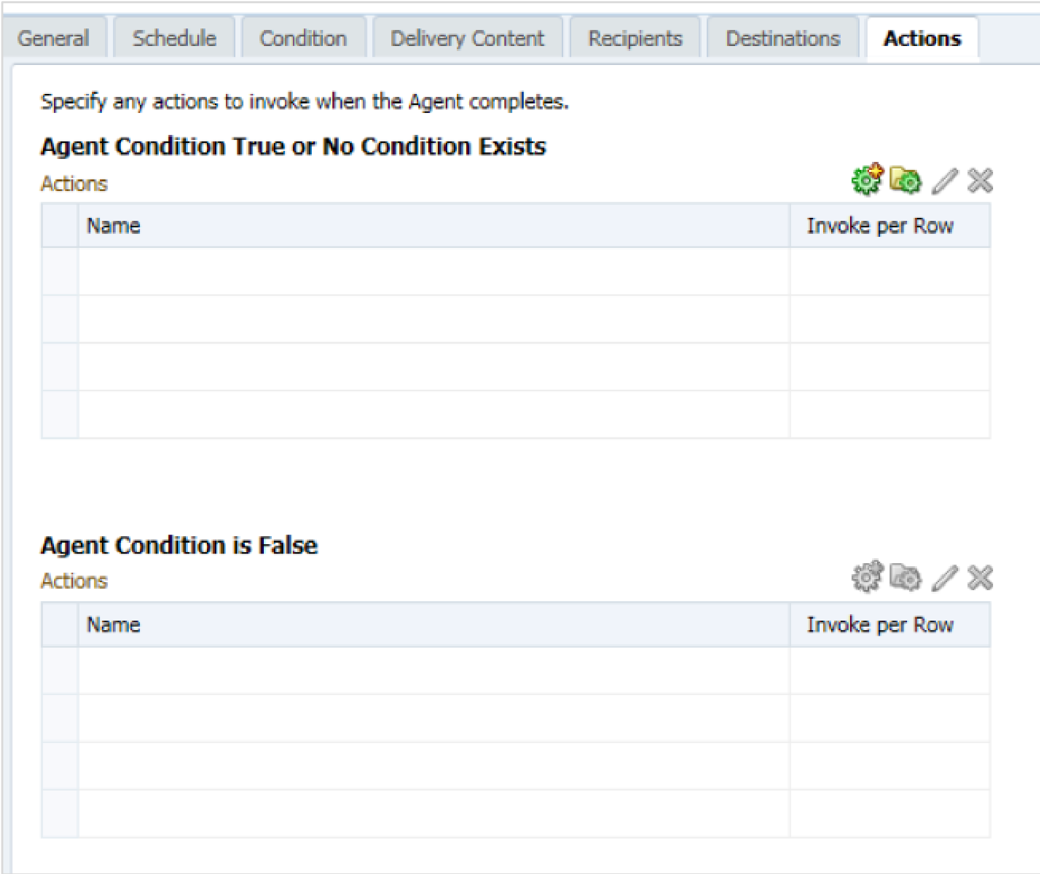
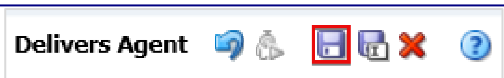
<tr>
<td>7</td>
<td>


</td>
</tr>
<tr>
<td>Action 7</td>
<td>
By clicking on the Destinations tab, users are presented with the following options:

Home Page and Dashboard – select this option to deliver the Agent to the ESR BI homepage
Devices – select this option to deliver the agent to an email address

*Please note that ESR BI will use the email address stored against the recipients person record in ESR.
</td>
</tr>
</table>

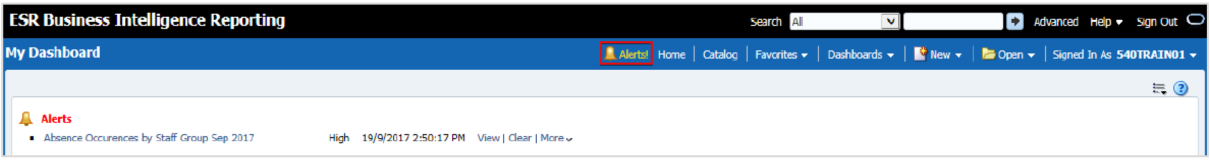
8	
Action 8	On the Actions tab, users can select actions that are available to be executed (These can be locally created actions, or National actions created by the NHS Central Team). ******Please note that if the agent has been set up to alert based on certain conditions, an Action can then be executed based on the condition.*
9	
Action 9	When happy with everything i.e. the Agent has been setup as required, you can then now select the above highlighted Save button to save your Agent in your preferred folder. Bearing in mind that the Agent will need to be saved in a shared / public folder to enable subscribers / recipients to access it when viewing the Alerts delivered to them.

ESR BI Agent Alert

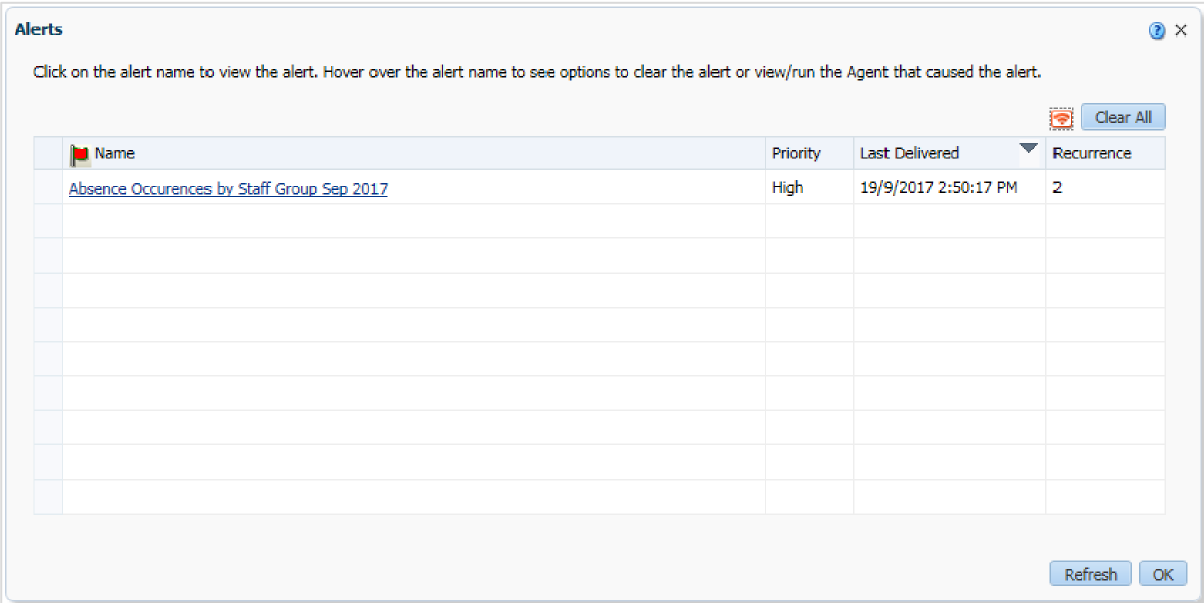
ESR BI Agents can be designed and setup to deliver alerts to a dashboard or to an email address, below are examples of how an alert may look when delivered to these two destinations.

Alert Delivered to a Dashboard

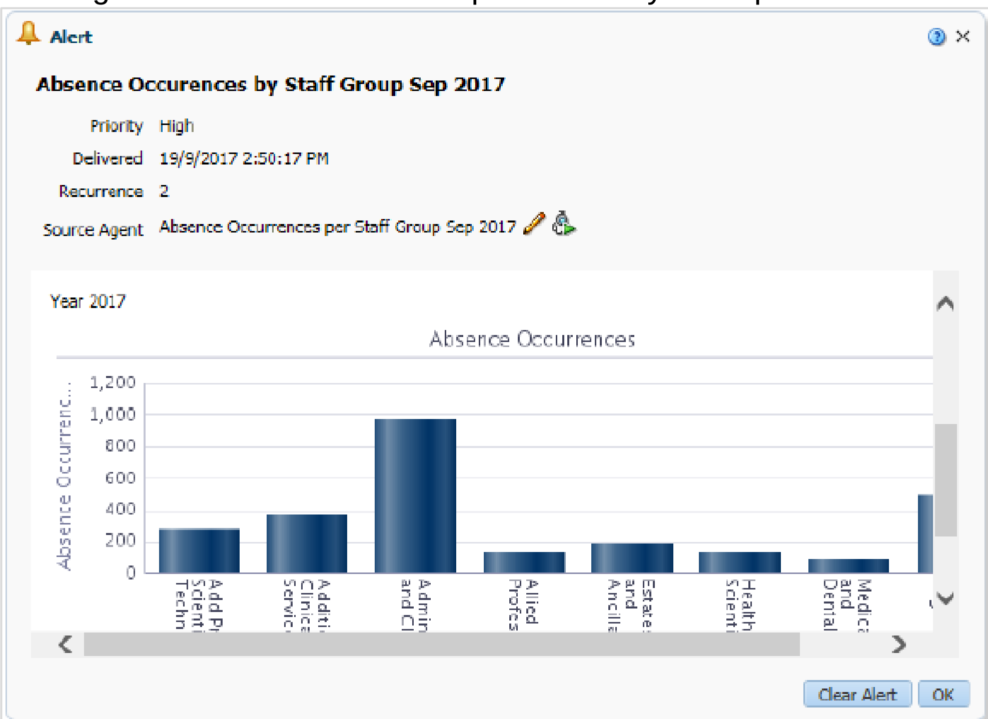
An 'Alerts' link will be displayed on the ESR BI header once a BI Agent has delivered an alert to a dashboard, please see below highlighted example:



An Alerts link will also be displayed on the ESR BI homepage (My Dashboard) as per the above example (Alerts in Red). Clicking either link will open the below Alerts window:



Clicking the above Alert link will open the analysis as per the below example:



Alert Delivered to an Email Address

Please note that it is not possible to add email addresses as recipients when creating an ESR BI Alert. However where the Devices checkbox is checked on the Destinations tab, ESR BI will use the email address stored against the recipients person record in ESR to deliver the Alert.