

# ESR Business Intelligence

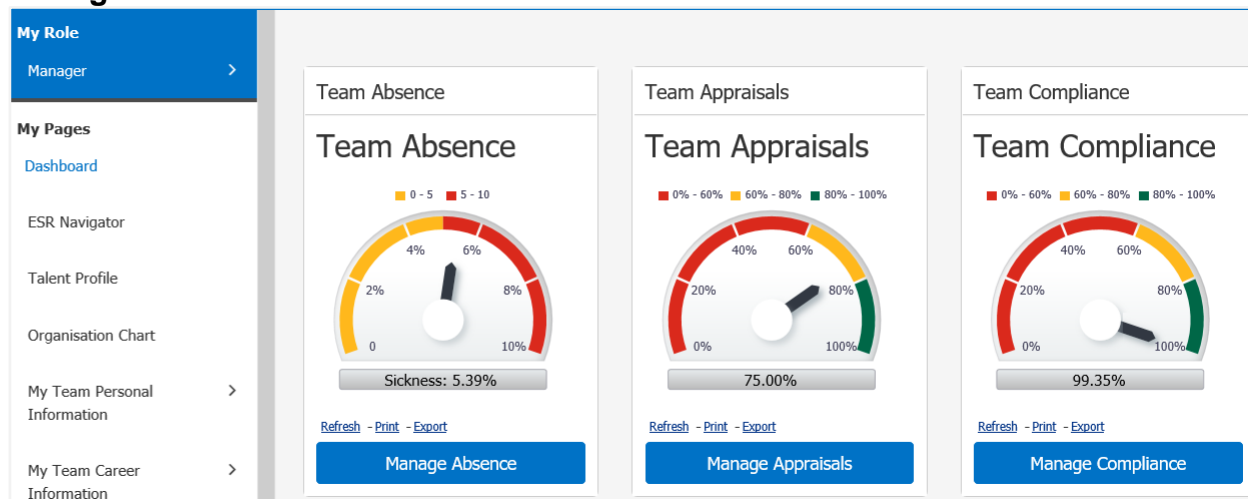
## Creating a Local Version of a National ESR BI Portlet

### Standard Portlets

The ESR Portal is a platform designed to be used by NHS Organisations to positively contribute to their efficiency and productivity targets, and more importantly support their staff engagement strategies. One of the many advantages of the ESR Portal is that it allows ESR BI portlet analyses to be displayed.

Portlet analyses are key performance indicator (KPI) type reports designed to run independently without relying on dashboard prompts or presentation variables to return results. These come in various formats such as gauges, bar graphs or tables and are restricted in size in order to display correctly within the space available on the ESR Portal. A number of national standard ESR BI portlets are already available on the ESR Portal for use by NHS Organisations. These are analyses designed to provide NHS managers and professional users with high level management information of key areas such as Absence, Appraisals and Compliance. Please see examples below:

#### Manager User:

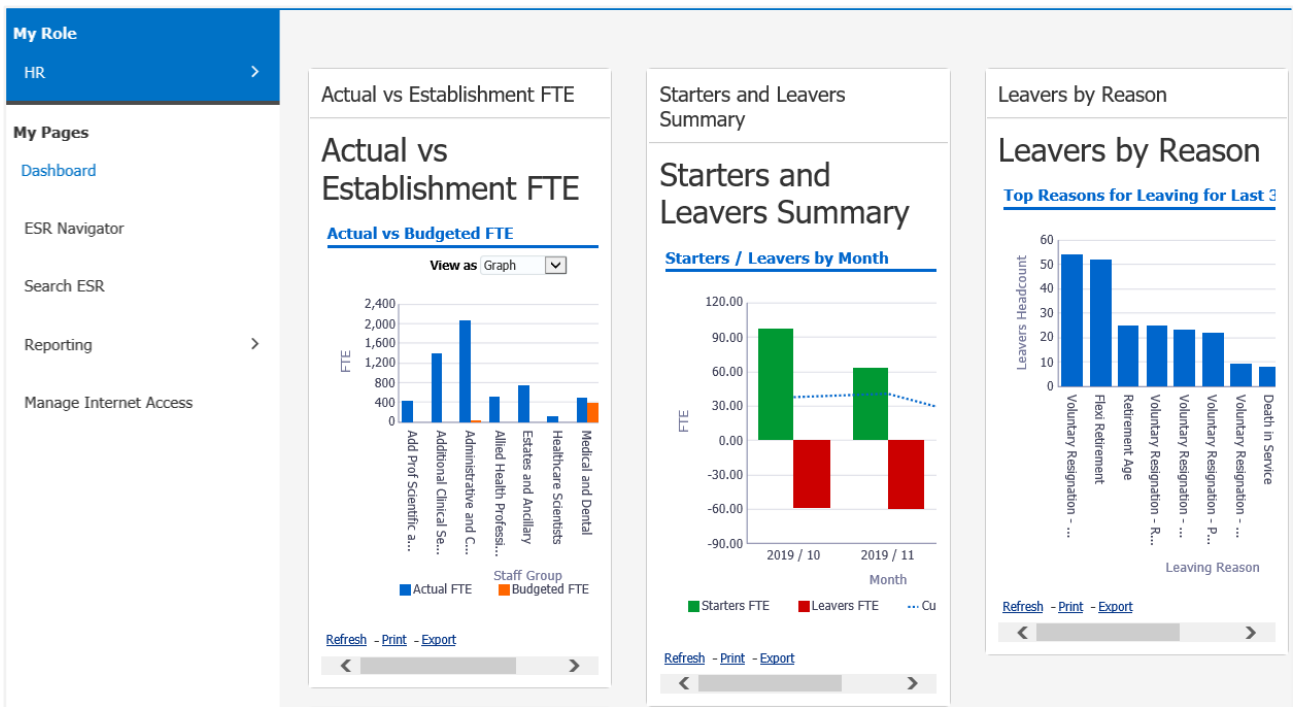


#### HR User:



## Electronic Staff Record





It is however recognised that the national standard ESR BI portlets may not always meet local requirements hence Organisations may decide to create their own local portlet analyses.

## Local Portlets

Local or custom portlets are analyses created by users locally to meet local requirements. These can either be created from scratch or users wishing to copy and customise the national portlets for use locally can follow the following steps:

### Customising the Standard Portlet

To copy an object from the standard NHS Portal Dashboards items folder:

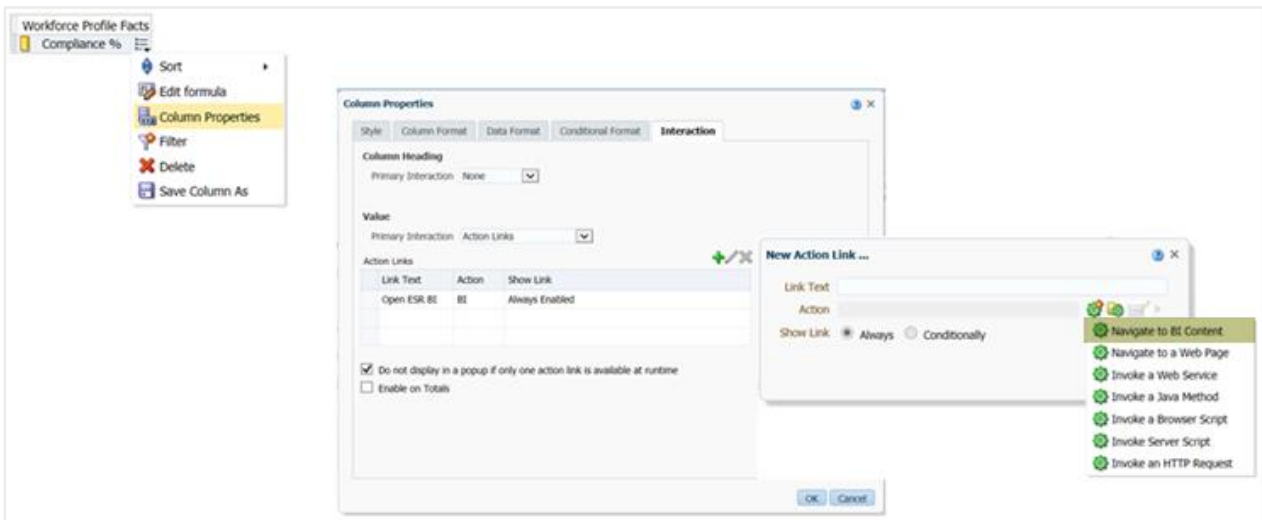
Step	Screen	Description
1		<p>Select the object you want to copy from the catalog by clicking on it (once selected, it will turn Blue) and click the  icon on the top toolbar.</p> <p>This is the copy icon. Any BI object (analysis, dashboard, filter etc.) can be copied using this method.</p>
2		<p>Click on 'Shared Folders' within the Folders Window and click on  icon which will paste the analysis into a</p>

		folder of your choice.
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Once the object has been copied, users are able to edit and save the analysis to update column formulas or filters in line with local requirements.

## Linking a Custom Portlet to a Local Dashboard

Most national portlets are designed with drill down functionality to navigate to relevant national dashboards however users may wish to navigate to local dashboards instead. To link a local portlet to a local dashboard, select 'Column Properties' of the column you wish to link to a local dashboard page, select the Interaction tab and set Column Heading and Value primary interaction as per the below example:



Select the + icon to bring up the option to add a new Action Link and then 'Navigate to BI Content' to link your Portlet to a local dashboard page.

**Note:** The existing 'Open ESR BI' action link (in the above example) may need to be removed before adding a new link to a local dashboard page. This can be done by selecting the action link and then the red 'X' icon. Some users however may prefer to maintain the link to the standard dashboard.

Once updated, the portlet analysis should be saved and reviewed to ensure it meets the below requirements:

## Prerequisites for a Custom Portlet Analysis

- ✓ Must be a 'standalone' analysis e.g. does not rely on dashboard prompts or presentation variables to return results.
- ✓ Should display data in a suitable format and size such as a gauge, bar graph or table format which will display appropriately within the space available on the ESR Portal.
- ✓ Must be performant.

## Procedure to add a custom portlet analysis to the ESR Portal

1. User must raise an SR and attach the Portlet analysis as a .catalog (archived) file.

**Note:** Guide available on the ESR Hub within the Reporting folder: *ESRBI - Managing Permissions and Archiving in ESR BI*, which describes how to archive/unarchive .catalog files.

2. IBM will review the SR and pass to NHS Central Team for further review.
3. NHS Central Team will review the portlet analysis suitability and performance and will return to IBM for deployment to the Portal. If the portlet is not suitable, the NHS Central Team will work through development with the organisation to ensure suitability.

Further information on creating local copies of NHS Standard Dashboards can be found in the: *ESRBI - Using National Analyses Outside National Dashboards* guide available on the ESR Hub within the Reporting folder.

