Customising National Content for Local HTML Questionnaires

Script

Introduction (00:00 – 00:31)

Hello and welcome to this video on how to customise national content for local HTML questionnaires. My name is Charlotte Hampton and in this video, we will look at what is currently available within ESRBI and how we can customise this to meet your reporting requirements for your own HTML based appraisal.

Before we get started on creating a local report, we will briefly cover what is currently available on the Dashboards, what knowledge of ESRBI is required before you can get started and where you can find further guidance.

NHS Appraisals and PMP Dashboard (00:32 – 01:01)

The Appraisals and PMP Dashboard is available to BI (Business Intelligence) Administration and HR Management and Administration URP holders. The Dashboard includes summary and detail reports for Appraisals, Objectives, Questionnaires and Scorecards.

It is the Questionnaire Detail which we will be focussing on today, and this is what you can see on this slide. By default, it will return the questions and answers of the national questionnaire.

Further detail on this Dashboard can be found on the online Dashboard guide.

Requirements (01:02 – 01:56)

Before we get started there are three requirements.

Firstly, you will need the Business Intelligence Administration URP.

You will also need to know how to copy a national object. If this is something you have not done before, there are a few resources on the ESR Hub which you might find useful. There is a guide called Creating a Local Version of a National Dashboard, and this is also covered in the Basic Report Writing Workshop which is available as a video.

You will need to have some understanding of CASE Statements, but we will go through an example of this during this session. For those who are new to CASE Statements, they are similar to an IF function in Excel and they go through a series of conditions and return a

value when the first condition is met. The Intermediate and Advanced Report Writing Workshop videos go through them in greater detail.

Copying a National Object (01:56– 02:22)

We need to start by taking a copy of the national object which in this case is the NHS Questionnaire Detail which can be found in the NHS Appraisal and PMP Dashboard Items folder.

This will need to be copied to a local folder with permissions set as appropriate. From here we will make amendments to the CASE Statement.

Amending Column Formulas (02:22 – 02:50)

In your local copy you will need to make amendments to three column formulas: Appraisee Question, Main Appraiser Question and Participant Question. Which of these three fields will be populated in the report is dependent upon who is conducting the appraisal with the employee.

It is not necessary to make any amendments to the answer fields.

Introduction to CASE Statements (02:51– 03:41)

Before we move on to looking at what specific changes are required to customise the Questionnaire Detail for local reporting requirements, we will have a look at a basic CASE Statement.

As mentioned previously, CASE Statements are similar to an IF function in Excel. We use CASE Statements throughout the BI Dashboards and what we are looking at here is a simple formula.

When an assignment's contracted hours are greater than 20, then BI returns a value of one, else, for everything else, it returns a value of two.

In this example, BI returns a numerical value but CASE Statements can also return text, which is how we take the HTML appraisal and turn it into a question to be able to report on it.

NHS Questionnaire Detail CASE Statement (03:42 – 04:18)

On this slide I have taken a snippet from the formula in the Appraisee Question column. We will go through and break down each part individually.

If you are new to CASE Statements, you may find it easier to read and write formulas if you break it down into individual lines to make it more manageable.

It is worth pointing out that in this example, the ellipses used are not part of the formula, I have just included them here to show that there are more conditions to the Statement that I have not included.

NHS Questionnaire Detail CASE Statement – Breakdown (04:18 – 07:22)

We can now begin to break it down. In purple we have the column formula, and this is found at the beginning and end of the CASE Statement. In this instance it is for the appraisee question, but the column reference will change each time. You can copy and paste the CASE Statement between the three columns that you need to make amendments to, but please be aware that you will need to change this part of the formula for the for Main Appraiser and Participant Question columns.

In green, blue, and yellow are the HTML field tags and the respective questions which is how they appear in the report.

In this example, the HTML tags are 'PDPDate', 'LerDev1' and 'LerDev2'. The HTML tags will need to be exactly as they appear in the HTML in order for the CASE Statement to work.

The CASE Statement finds the HTML field tags in the questionnaire and returns the text written in the formula. This is where we covert the HTML into the question as it appears in the BI report.

The CASE Statement ends with the column formula. This too will need to change between each column, just like at the beginning.

Now we that we know what each part of the CASE Statement means, if we look at each section individually, we can understand how it comes together. Once a condition is true it will stop and return a result.

CASE, appraisee question – the column formula.

When the HTML field tag is 'PDPdate', then return 'PDP Date' as the question in the BI report.

When the HTML field tag is 'LerDev1' then return 'What is the development need? Relate the development need to the NHS KSF dimensions and levels'.

When the HTML field tag is 'LerDev2', then return 'learning and development activity…'.

And this will continue for all the HTML field tags and questions.

Then 'ELSE' and the column formula again. If no condition is met, then it will return what is

defined after the 'ELSE' part of the Statement. In the earlier example, we returned a value of two for assignments whose contracted hours were not greater than 20. In this example, if there is no HTML appraisal, the CASE Statement will return the question from the national questionnaire.

Next, we will look at how this would appear on the BI report.

In this example, we have used the second HTML field tag to demonstrate what would be returned in the report, but in BI all the questions would be returned as per how it was set up in the formula.

Amending the NHS Questionnaire Detail CASE Statement for Local Reporting Requirements (07:23 – 08:06)

Now that we have broken down the different parts of the CASE Statement we can now look to make amendments for our own local reporting requirements.

In this example of the formula, I have renamed the field tags and will include this in the accompanying script for this video. This is all you need to create your local reporting solution and for the most part you can copy this like for like, changing the column formula and changing the HTML field tags and questions as required.

At the bottom of the screen is an example of how the first question would be reported.

Additional Resources (08:07 – 08:35)

We have reached the end of this video on customising national content for local HTML questionnaires. All resources mentioned are available on the ESR Hub, alongside the script for this video.

If you have any questions about implementing a local HTML based appraisal, please speak to your account manager.

And for any issues with ESRBI please raise them via the Service Desk. Thank you for listening.

Example Formula

CASE "Human Resources - Appraisals and PMPs"."Appraisal"."Appraisee Question" WHEN 'HTMLtag1' THEN 'Your question 1 as you wish it to appear in BI' WHEN 'HTMLtag2' THEN 'Your question 2 as you wish it to appear in BI' WHEN 'HTMLtag3' THEN 'Your question 3 as you wish it to appear in BI' ELSE "Human Resources - Appraisals and PMPs"."Appraisal"."Appraisee Question" END