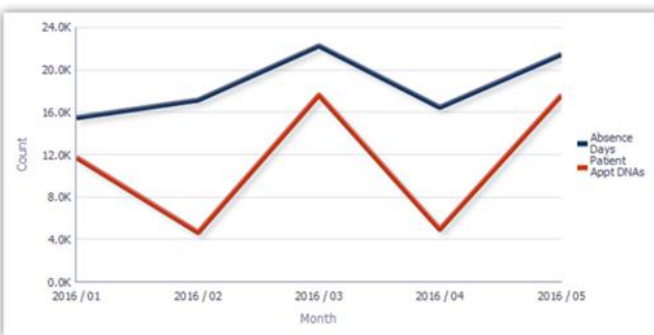


Ten Steps to using External Data within ESRBI

- 1 Raise an SR requesting use of the ESRBI External Data Functionality.
- 2 Setup your secure FTP account. Full details will be provided in the SR on how to setup a secure FTP account for transferring files for upload into ESRBI.
- 3 Ensure you have a clear understanding of what external data you are looking to combine with ESR data and how you envisage the final reporting will look.



- 4 Create a file layout ready to import into BI. This can either be done from scratch or an example is provided in the ESRBI External Data User Guide available on the ESR Hub within the Reporting folder.

Key Type	Key Value	Record Type	Date	Delete Flag	Decimal1	Decimal2
ORG	123456	FIN	20160131		12309.23	23
ORG	123456	FIN	20160228		12093.48	24
ASG	475849	PAT	20160131		93	2
ASG	475849	PAT	20160228		80	5

- 5 Establish the data object the external data is to be loaded against. Data can be loaded against the following objects; Positions, Organisations or Assignments.

- Position
- Position Name
- Organization Name
- Organization Number
- Organization Type

- 6 Obtain Object IDs. The easiest way to do this is to run a report in BI and export the data. The object IDs are Organisation Number, Position Number or Assignment Number.

A screenshot of a BI report window. The window title is 'Table'. The table has two columns: 'Organization Number' and 'Organization Name'. The data rows are as follows:

Organization Number	Organization Name
32662	504 Ward 10
32666	504 Ward 6
32668	504 Ward 7
32669	504 A & E Department
32671	504 Ward 12
32678	504 Ward 9
32679	504 Ward 1
32683	504 Ward 2
32685	504 ESR Hospitals NHS Trust

Need more help? Open the 'Introduction to ESR Business Intelligence' dashboard or visit the ESR Hub > Reporting folder for ESR BI Guides

Ten Steps to using External Data within ESRBI

7 Populate the file layout created earlier with data. The key fields to include (other than the data to be loaded) are Key Type (Object Type), Key Value (Object ID), Record Type (e.g. FIN for finance data. This is used to identify the data once in ESRBI) and Date (the date in ESRBI the data is to be loaded against).

Key Type	Key Value	Record Type	Date	Delete Flag	Decimal1	Decimal2
ORG	123456	FIN	20160131		12309.23	23
ORG	123456	FIN	20160228		12093.48	24
ASG	475849	PAT	20160131		93	2
ASG	475849	PAT	20160228		80	5

8 Ensure the template has the correct File Header and Trailer rows and save the file in CSV format. Ensure the correct file naming convention is used.

An example File Header:

HDR	BI_123_XXX_20161019_00000001.DAT	20161019 171400
-----	----------------------------------	-----------------

An Example File Trailer:

TRL		14
-----	--	----

An example filename could be:

BI_123_XXX_20161019_00000001.csv

9 Change the file extension to .DAT from .csv. The file is now ready to be uploaded into ESRBI.

An updated example filename could be:

BI_123_XXX_20161019_00000001.DAT

10

Upload the file. Files are processed weekly (at the weekend). Wait for confirmation of success, or detail of failures to be corrected.