

ESR Business Intelligence

Customising a National Analysis

Introduction

Each National Dashboard in ESR BI is made up of a number of analyses. These analyses are not only placed together in the dashboard, they can be linked to the dashboard in a number of ways. This guide will show you how to copy National Analyses and use them as individual items outside National Dashboards.

Copying an Analysis

To copy an analysis from the public area:

Step	Screen	Description
1		Select the analysis you want to copy from the catalog by clicking on it (you will see it turn blue) and click the icon on the top toolbar. This is the copy icon.
2		Click on 'My Folders' in the Folders Window and click on icon which will paste the analysis into the folder.



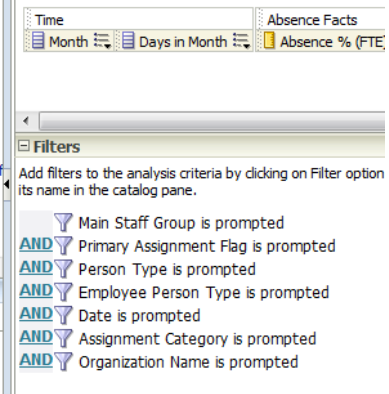
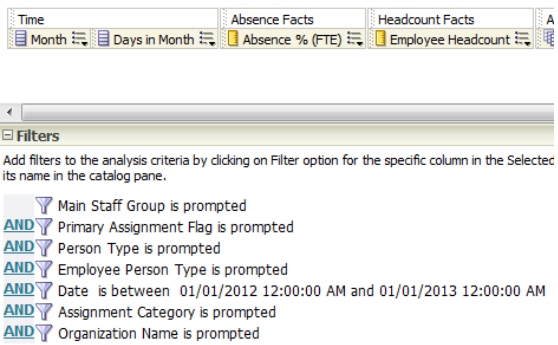
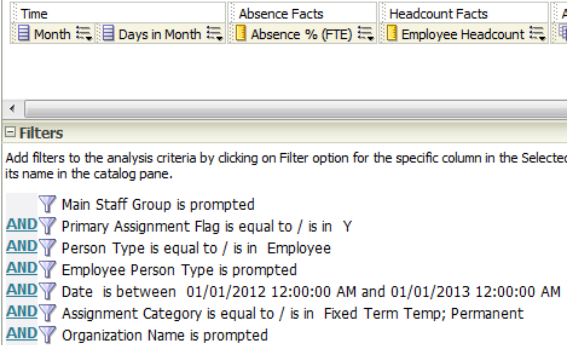
Electronic Staff Record



The analysis is now copied into your personal folder but may not work correctly on its own depending on how the analysis has been setup so may need to be changed.

The primary reason an analysis copied from a dashboard will not work on its own (or returns unexpected figures) is due to the use of 'Is Prompted' filters within the analysis. These require input from a dashboard prompt without which, the analysis may behave differently. For example a 'Staff in Post' analysis might normally exclude 'Honorary' person types in a dashboard, but when run on its own, will include them.

To update an analysis using 'Is Prompted' filters to run outside a dashboard:

Step	Screen	Description
1	 <p>Add filters to the analysis criteria by clicking on Filter option for its name in the catalog pane.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Main Staff Group is prompted AND <input type="checkbox"/> Primary Assignment Flag is prompted AND <input type="checkbox"/> Person Type is prompted AND <input type="checkbox"/> Employee Person Type is prompted AND <input type="checkbox"/> Date is prompted AND <input type="checkbox"/> Assignment Category is prompted AND <input type="checkbox"/> Organization Name is prompted 	<p>This is a screen shot of the filters used in the absence timeline analysis. You can see all the filters are 'Is Prompted' filters. If we ran the analysis on its own like this, the primary difference you would see (from the dashboard) is that it would return an entire date track history due to no date parameter being supplied.</p>
2	 <p>Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected its name in the catalog pane.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Main Staff Group is prompted AND <input type="checkbox"/> Primary Assignment Flag is prompted AND <input type="checkbox"/> Person Type is prompted AND <input type="checkbox"/> Employee Person Type is prompted AND <input type="checkbox"/> Date is between 01/01/2012 12:00:00 AM and 01/01/2013 12:00:00 AM AND <input type="checkbox"/> Assignment Category is prompted AND <input type="checkbox"/> Organization Name is prompted 	<p>In this example you can see we have changed the Date 'Is Prompted' filter to an 'Is Between' filter and supplied two dates (which would have previously been supplied by the dashboard prompt). The analysis will now only return data between the two dates.</p>
3	 <p>Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected its name in the catalog pane.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Main Staff Group is prompted AND <input type="checkbox"/> Primary Assignment Flag is equal to / is in Y AND <input type="checkbox"/> Person Type is equal to / is in Employee AND <input type="checkbox"/> Employee Person Type is prompted AND <input type="checkbox"/> Date is between 01/01/2012 12:00:00 AM and 01/01/2013 12:00:00 AM AND <input type="checkbox"/> Assignment Category is equal to / is in Fixed Term Temp; Permanent AND <input type="checkbox"/> Organization Name is prompted 	<p>You can also change other 'Is Prompted' filters as required (or to match the defaults supplied by the dashboard prompt). In this example we have changed the Primary Assignment Flag, Person Type and Assignment Category.</p>

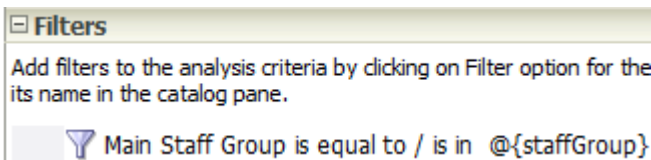
Another reason an analysis copied from a dashboard will not work on its own (or returns unexpected figures) is due to the use of presentation variables either within a filter or a formula.

In the example below, the formula requires a value from a presentation variable to run correctly. To update an analysis with a formula using a presentation variable to run outside a dashboard:

Step	Screen	Description
1	<p>Column Formula</p> <pre>((SUM(CASE WHEN ("Absence Type / Reason", "Absence Type" LIKE '@{absType}{%}' AND "Absence Type / Reason", "Absence Category" LIKE '@{absCat}{%}') AND "Absence Type / Reason", "Absence Reason" LIKE '@{absReason}{%}' THEN "Assignment", "FTE" ELSE 0 END)) / SUM("Assignment", "FTE")) * 100</pre>	<p>Working again in the Absence Timeline analysis, this is the formula used to calculate the Absence FTE %. You will see within the formula a number of entires which look like '@{xxxx}{xxxx}'. These are references to presentation variables which are set within a dashboard prompt.</p>
2	<p>Column Formula</p> <pre>((SUM(CASE WHEN ("Absence Type / Reason", "Absence Type" LIKE '@{absType}{%}' AND "Absence Type / Reason", "Absence Category" LIKE '@{absCat}{%}') AND "Absence Type / Reason", "Absence Reason" LIKE '@{absReason}{%}' THEN "Assignment", "FTE" ELSE 0 END)) / SUM("Assignment", "FTE")) * 100</pre>	<p>The first value encased in brackets after the '@' is the name of the presentation variable e.g. @ {absType}. The second value is the default value we would like the formula to use when the presentation variable is not available i.e. when running the analysis outside the dashboard. In this example we have used {%} where % is a wildcard so we are effectively saying include all values.</p>

3	<p>Column Formula</p> <pre>((SUM(CASE WHEN ("Absence Type / Reason"."Absence Type" LIKE '{@absType}{Sickness}' AND "Absence Type / Reason"."Absence Category" LIKE '{@absCat}{Sickness}') AND "Absence Type / Reason"."Absence Reason" LIKE '{@absReason}{Sickness}' THEN "Assignment"."FTE" ELSE 0 END)) / SUM("Assignment"."FTE")) * 100</pre>	<p>In this example we have changed all the default values from % to 'Sickness' so when the analysis is run outside the dashboard (and no presentation variable value is available), the default value to use is 'Sickness'</p>
4	<p>Column Formula</p> <pre>((SUM(CASE WHEN ("Absence Type / Reason"."Absence Type" = 'Sickness' AND "Absence Type / Reason"."Absence Category" = 'Sickness') AND "Absence Type / Reason"."Absence Reason" = 'Sickness' THEN "Assignment"."FTE" ELSE 0 END)) / SUM("Assignment"."FTE")) * 100</pre>	<p>You could of course remove the reference to the presentation variable altogether. In this example we have removed the three references to presentation variables and used an '=' function instead.</p>

The same principles are used when referencing presentation variables using filters. Below is a filter using the presentation variable `@{staffGroup}` for the Main Staff Group data item where no default value has been set:



The default value of 'Nursing and Midwifery' has now been set to enable to the analysis to function correctly where the presentation variable is not available (outside the dashboard).

