

ESR Business Intelligence

Using Publisher within ESR Business Intelligence

Introduction

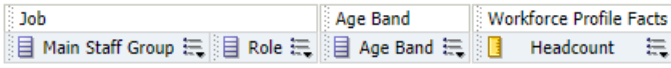
BI Publisher enables users to run, schedule and view reports; ready to be accessed as required by a user. The reports can include tables, pivot tables and charts, can be exported in various formats such as Excel and PDF and are able to be customised with filters and conditional formatting similar to BI analyses. Unlike Agents, they are not restricted to 75 rows.

Users can use BI Publisher to run reports that are required on a recurring basis in a specified format. These can be built from an existing Business Intelligence analysis in the form of a Data Model or can be created using a Subject Area.

Note: it is recommended that reports are based on existing BI Analyses (Data Model) rather than creating a report based on a Subject Area.

Using a Data Model

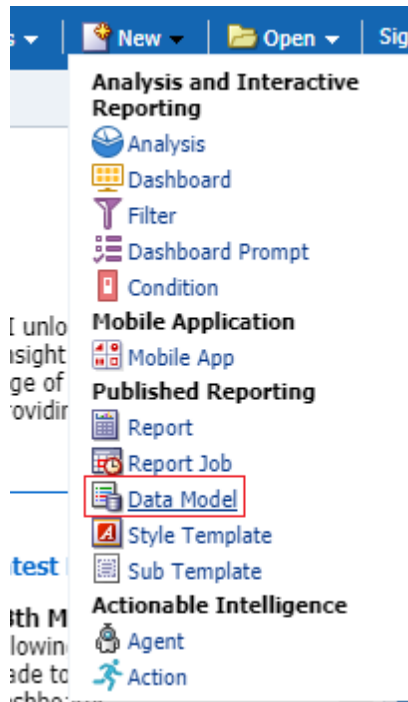
Using a Data Model involves using an analysis that has been built previously. When you create the analysis, include any formulas or filters that you wish the report to include.

Step / Action	Example Screen / Action Description
1	 <p> Filters Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Colour Date is equal to / is in CURRENT_DATE AND Main Staff Group is equal to / is in Administrative and Clerical; Estates and Ancillary AND Age Band is equal to / is in <=20 Years </p>



Electronic Staff Record

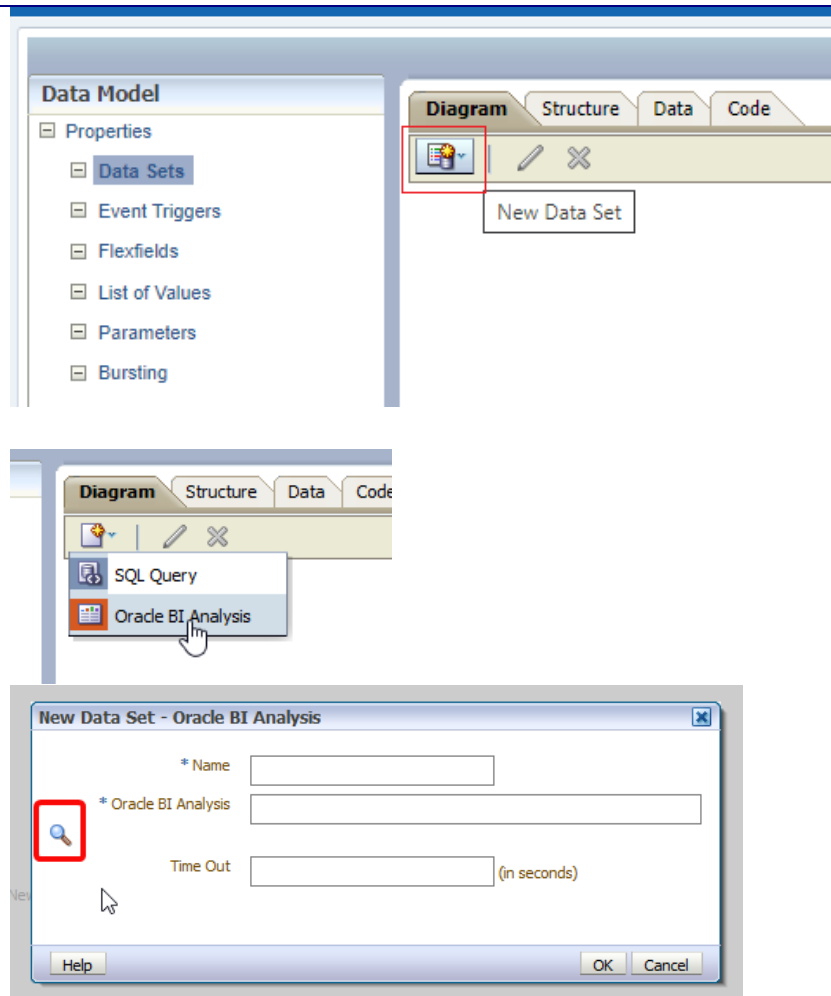




Action 1

Click the New dropdown in the header and select Data Model.










2



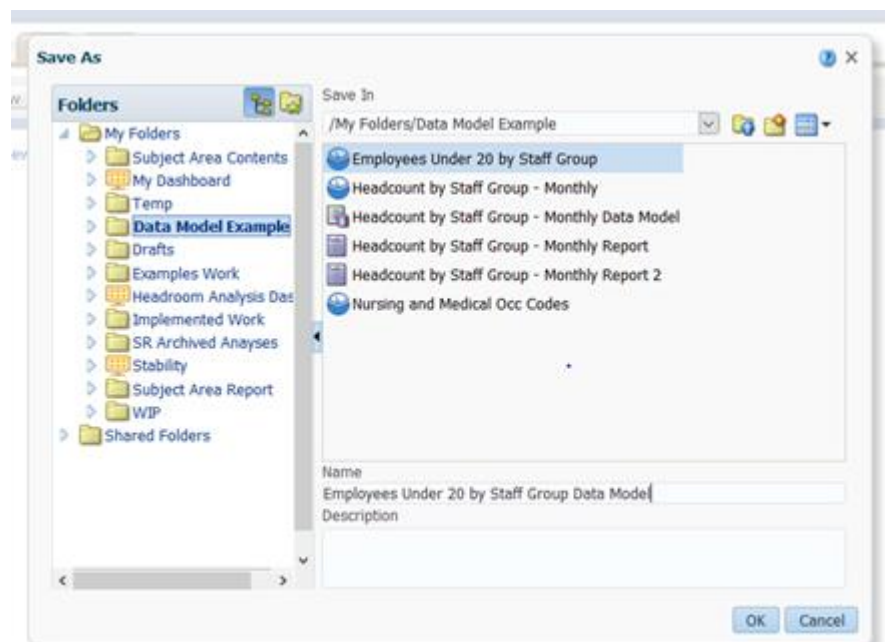
Oracle BI Analysis
BI Catalog Home

 [Shared Folders](#)
 [Users](#)

Oracle BI Analysis
BI Catalog Home > Shared Folders

 001
 008
 009
 010
 018
 020
 028
 030
 038
 040

Save



Action 2

Select the icon beneath the Diagram tab and select Oracle BI Analysis.

In the pop up users will need the name and location of the BI Analysis that will be used for the Data Model. This can be sourced from the Shared Folders or the user's personal folder.

Note: users will only have access to their own VPD folder.

Once the source analysis has been selected, the Data Model will need to be saved by selecting the save icon in the top right hand corner.

3

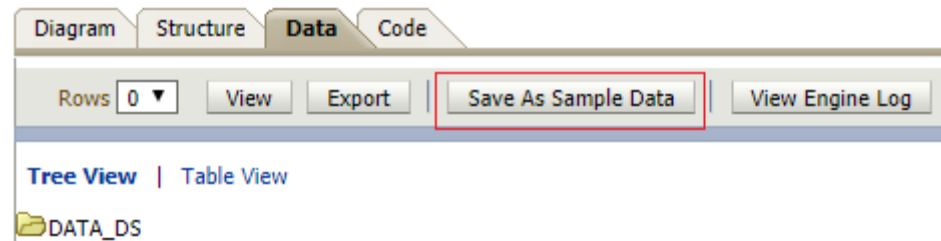
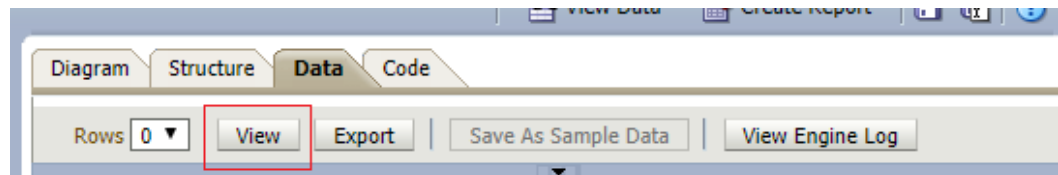
Structure

Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
Under 20s by Staff Group	G_1			G_1	
ce7e06b79e5e4108f	Column0			"Job","Main Staff Group"	abc
c4ec426b281eabbb	Column1			"Job","Role"	abc
c73e12f872df3729	Column2			"Age Band","Age Band"	abc
c5b4aa31f8f595cd	Column3			"Workforce Profile Facts","Headcount"	abc

With Amendments:

Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
Under 20s by Staff Group	G_1			G_1	
ce7e06b79e5e4108f	Column0			Staff Group	abc
c4ec426b281eabbb	Column1			Role	abc
c73e12f872df3729	Column2			Age Band	abc
c5b4aa31f8f595cd	Column3			Headcount	abc

Data



Action 3

Select the Structure tab and amend the 'XML Tag Name', 'Value If Null' and 'Display Name'.

Note: If this is not amended the headers will display as per their formula – eg. "Employee Attributes"."Employee Number".

The amendments to XML Tag Name' will be displayed if the output is exported as a CSV file.

Then go to the Data tab and select View. This may take a few minutes to load whilst it is processing. Once this has finished, select Save as Sample Data.

Once Saved as Sample Data, users need to save the Data Model again. The Data Model has now been created.

4

New Open Signed In A

Analysis and Interactive Reporting

- Analysis
- Dashboard
- Filter
- Dashboard Prompt
- Condition

Mobile Application

- Mobile App

Published Reporting

- Report
- Report Job
- Data Model
- Style Template
- Sub Template

Actionable Intelligence

- Agent
- Action

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model Use Subject Area

Create a report using an existing Data Model

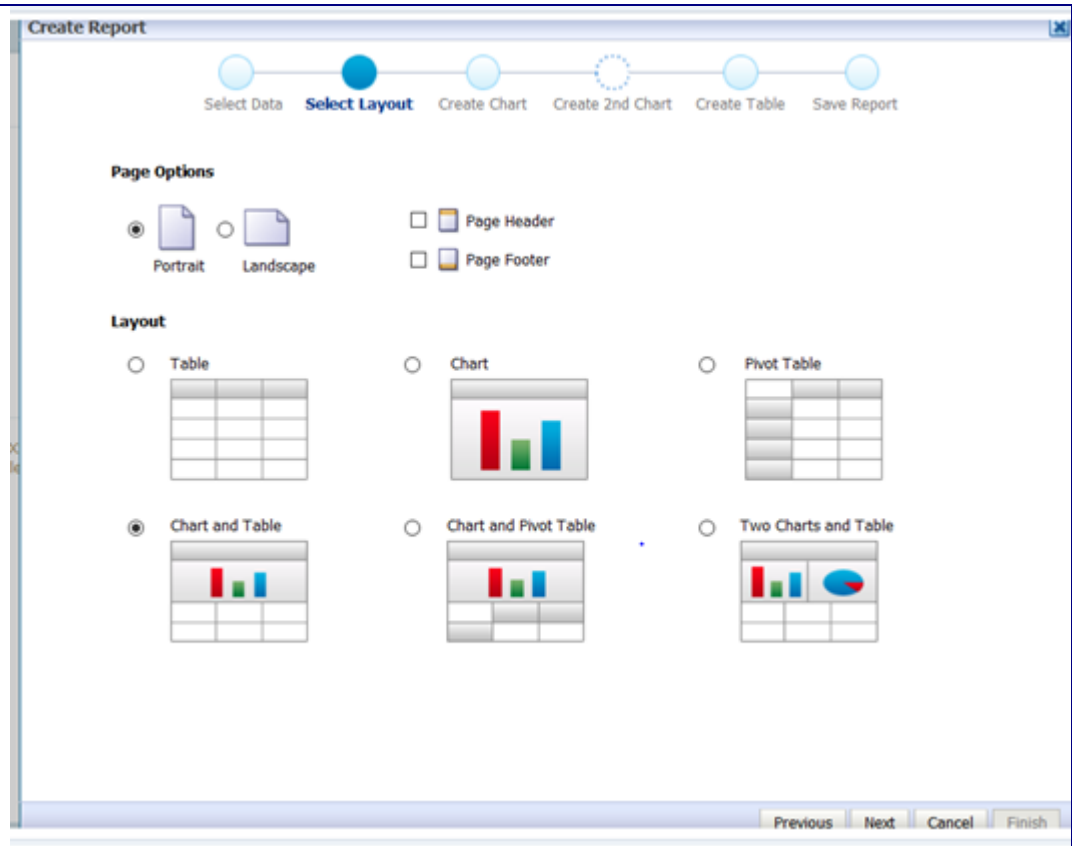
Data Model /~/NHSCHAMPTON01/Data Model Example

How do you want to create your report?

Guide Me Use Report Editor

Previous Next Cancel Finish

Select Layout

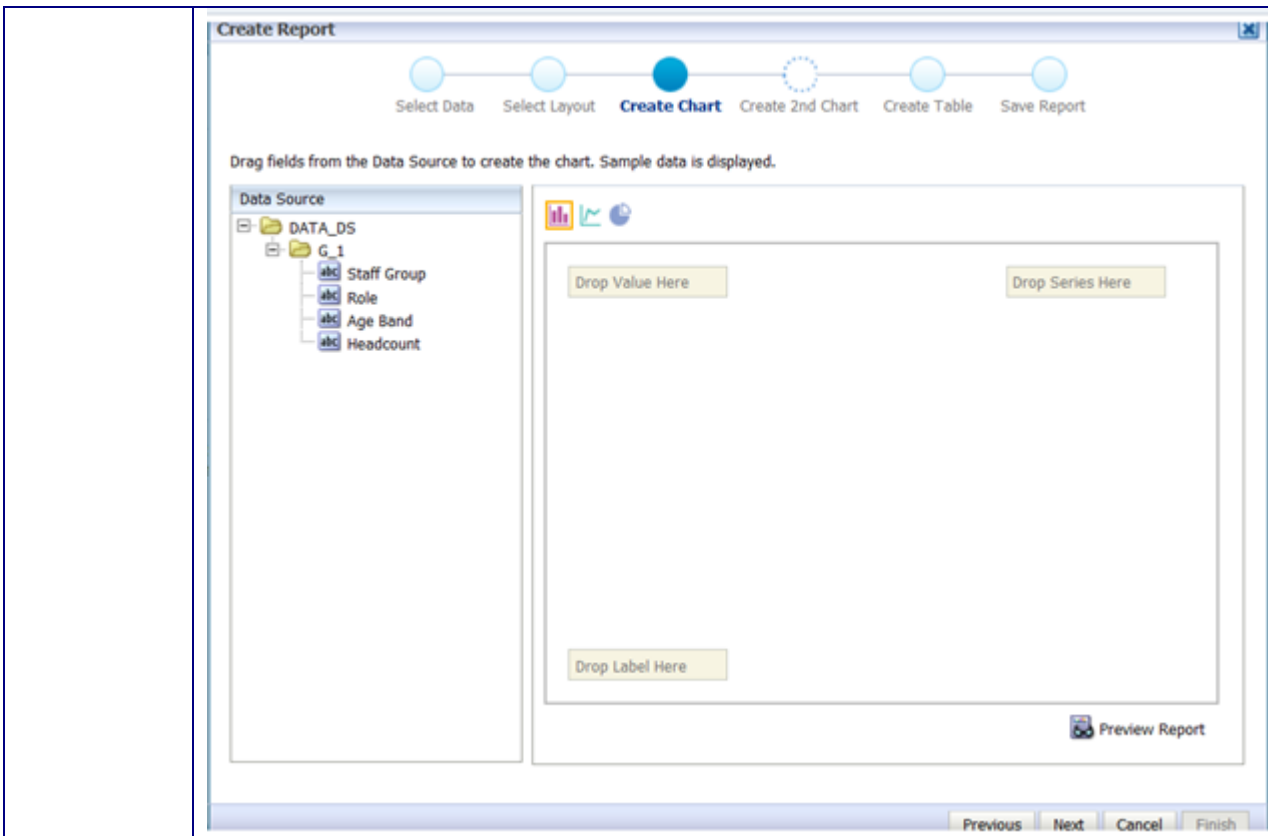


Action 4 Users will now be re-directed to 'Create Report'. If there is a Data Model already saved, this page can be accessed via Report in the New drop down.

The data source will already be selected as the Data Model if users have come directly from creating it.

It is recommended that the 'guide me' tool is used.

5 **Chart**



Action 5

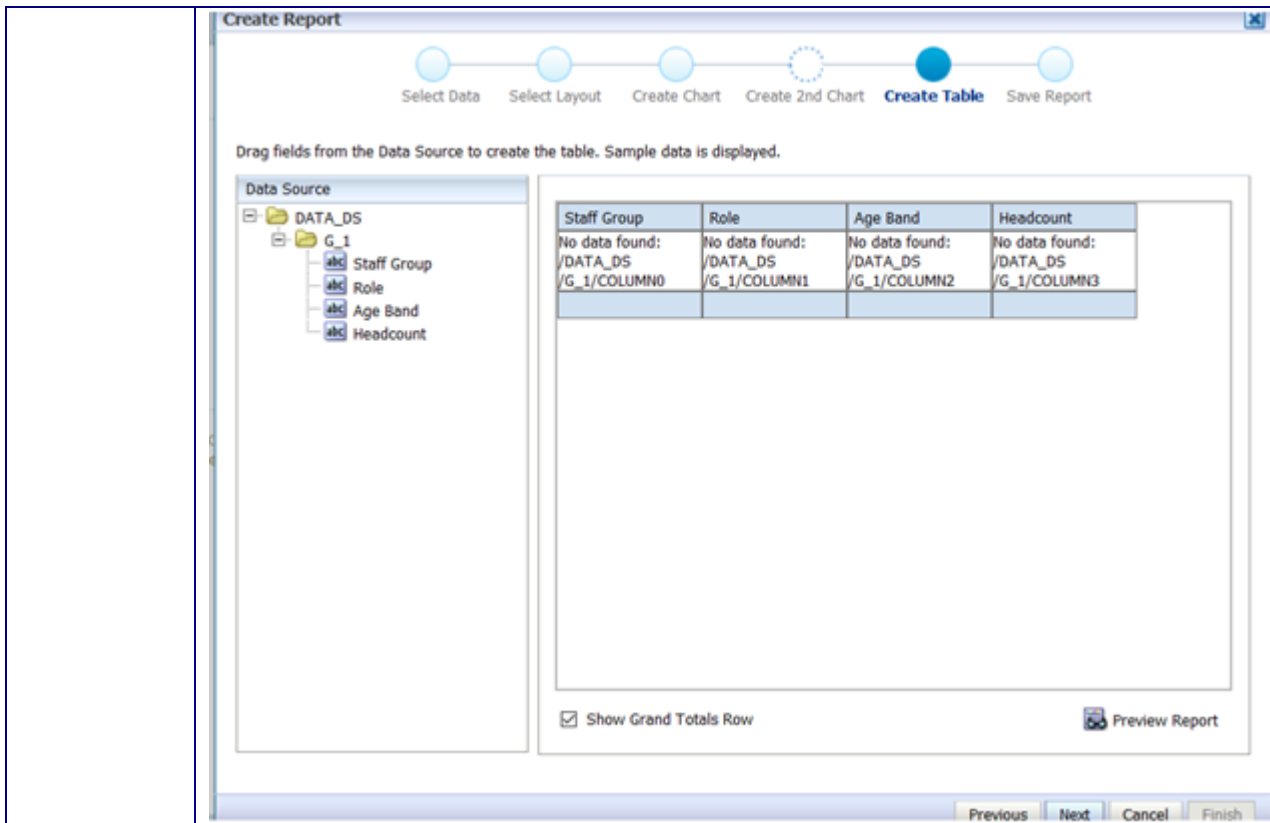
When creating the Report, click Next to move from the layout to the different options.

When designing the layout of the chart, criteria can be dragged from Data Source on the left hand side.

The design of the chart can also be selected here: bar, line or pie. This can be amended later on when the report is customised.

Once the chart has been designed, select Next.

6 **Table**



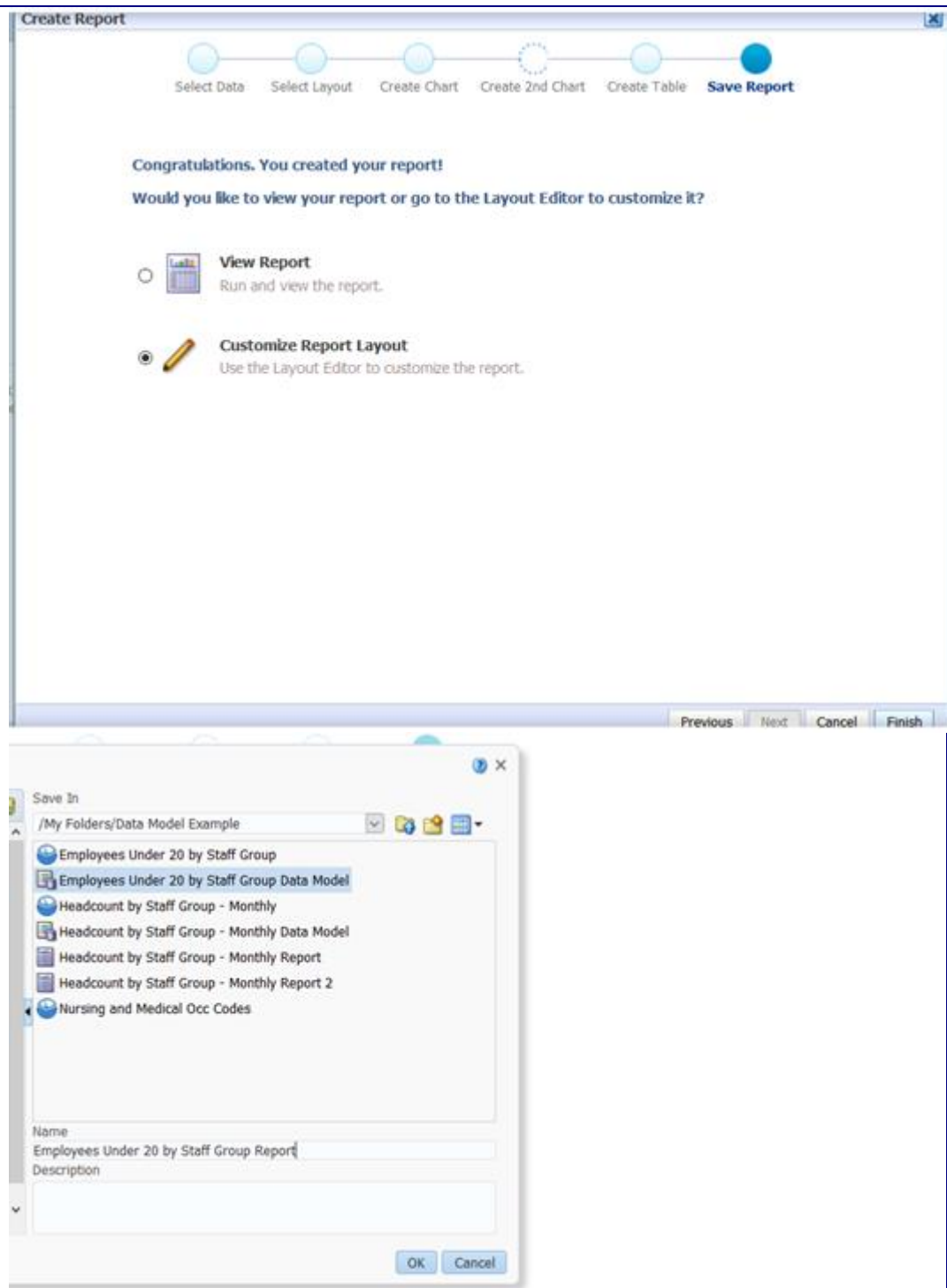
Action 6

If the selected layout is a chart and table, the user will then be prompted to create the table.

The table will automatically bring the columns from the Chart, however additional columns can be added from the left hand side which is made up from the BI Analysis.

Note: filters and other customisations can be added in the next step.

7



Action 7

Once the chart and table have been designed, users will have the option of viewing or customising their report.

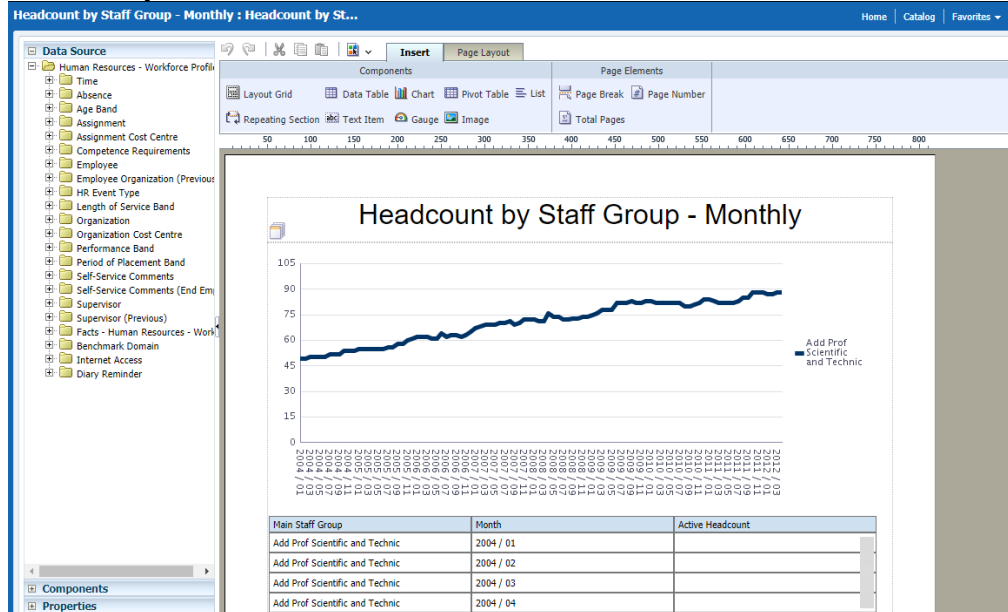
If users select Customise Report Layout they will be redirected to these options.

All users must now save the report.

Customising

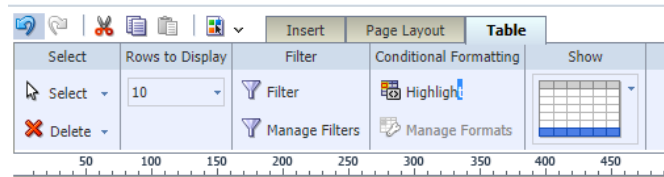
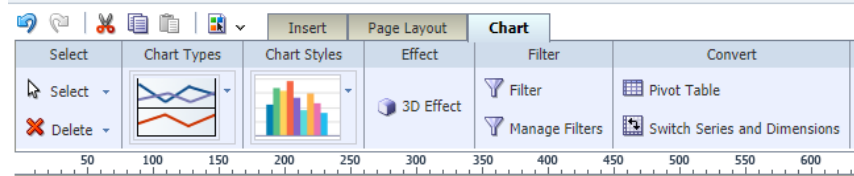
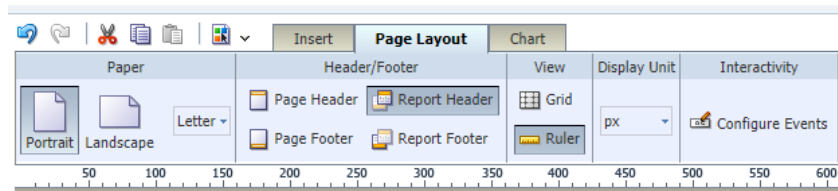
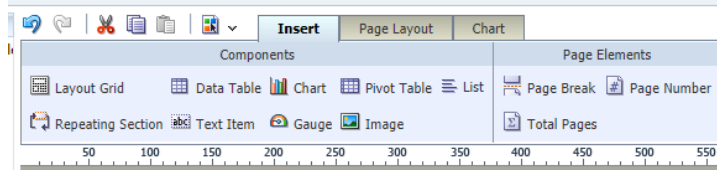
Step / Action Example Screen / Action Description

Default layout:



Customise report ribbon options:

1



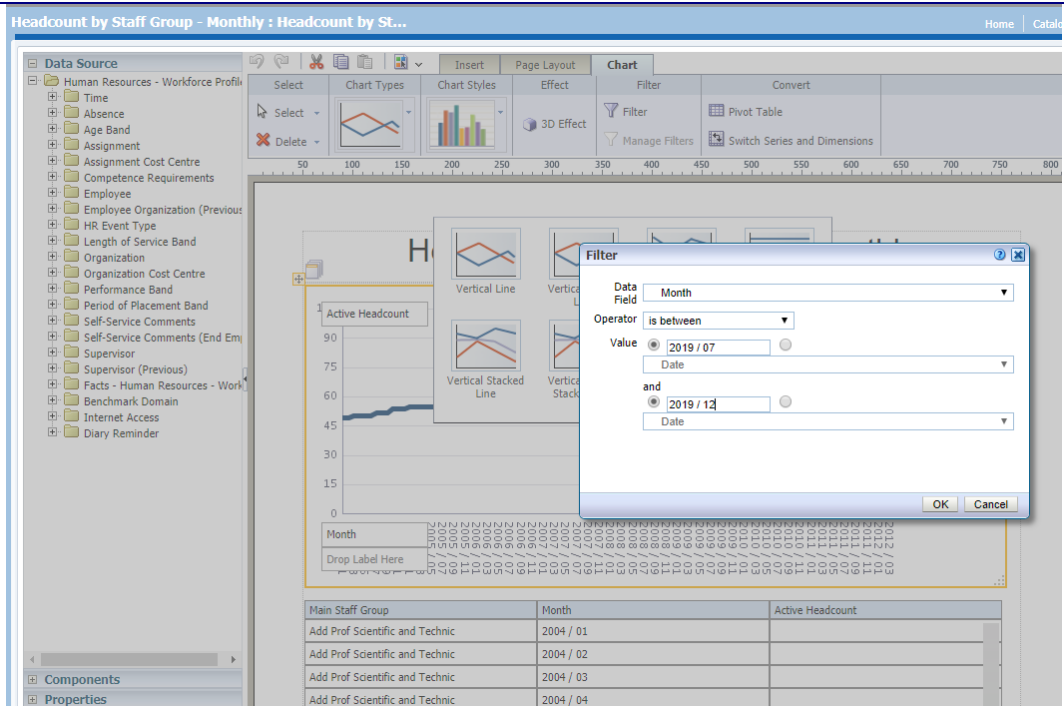
Action 1

Users can apply a range of customisations to their report, which can be found in the ribbon at the top of the page.

Users must select the Chart or the Table to enable the specific

customisations for each.

2



Filtering

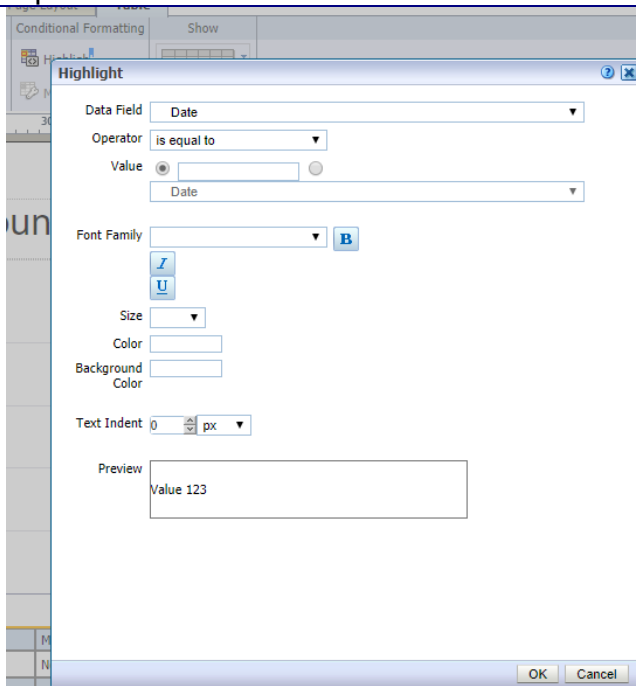
Users can apply a filter by selecting Filter in the ribbon at the top of the Report.

Action 2

To apply a filter, select the item (chart, table, pivot table) and then choose the filter parameters. This will only apply the filter to the selected item.

In this instance, to apply the filter to the table, the action will need to be repeated.

3



Conditional Formatting

Action 3

Users can apply conditional formatting to their report, in the same way that it can be applied to an analysis.

To apply conditional formatting to a table, select the table and in the ribbon select the Table tab. Under Conditional Formatting select Highlight.

The user can then select the conditions from their desired column.

4

Headcount by Staff Group - Monthly

Main Staff Group	Month	Active Headcount
Add Prof Scientific and Technic	2019 / 07	
Add Prof Scientific and Technic	2019 / 08	
Add Prof Scientific and Technic	2019 / 09	
Add Prof Scientific and Technic	2019 / 10	
Add Prof Scientific and Technic	2019 / 11	
Add Prof Scientific and Technic	2019 / 12	
Additional Clinical Services	2019 / 07	
Additional Clinical Services	2019 / 08	
Additional Clinical Services	2019 / 09	
Additional Clinical Services	2019 / 10	

Action 4

Once customisations have been applied, save any changes and select Done.

Users now can proceed to scheduling the Report.

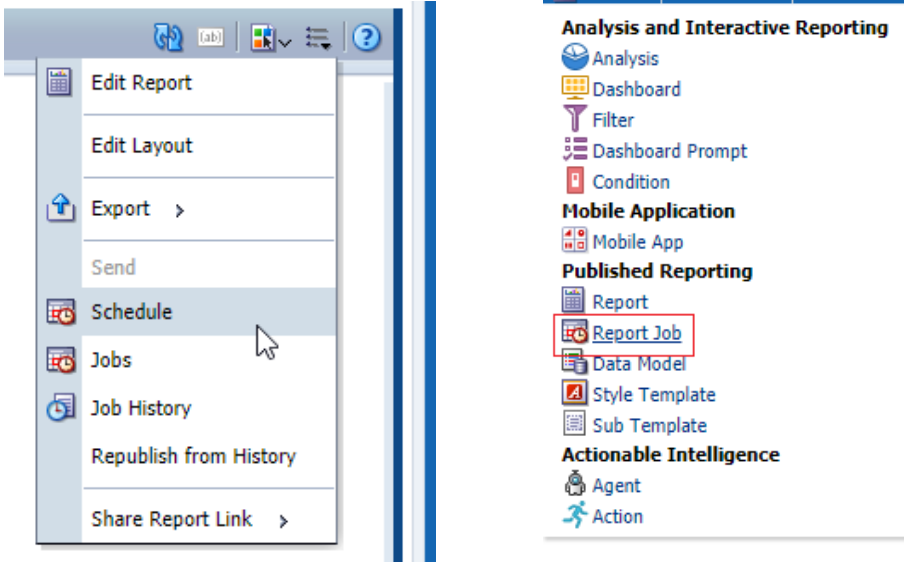
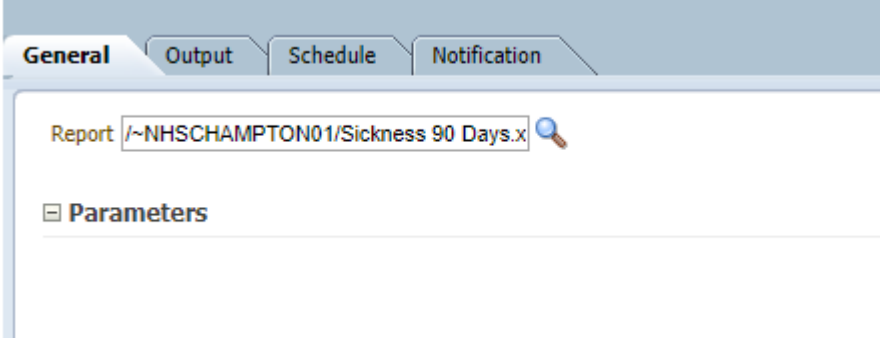
Scheduling and Viewing

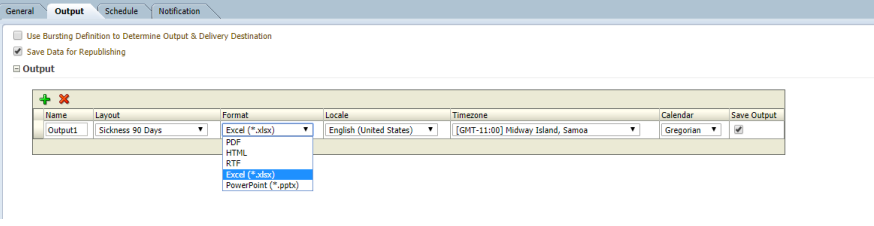
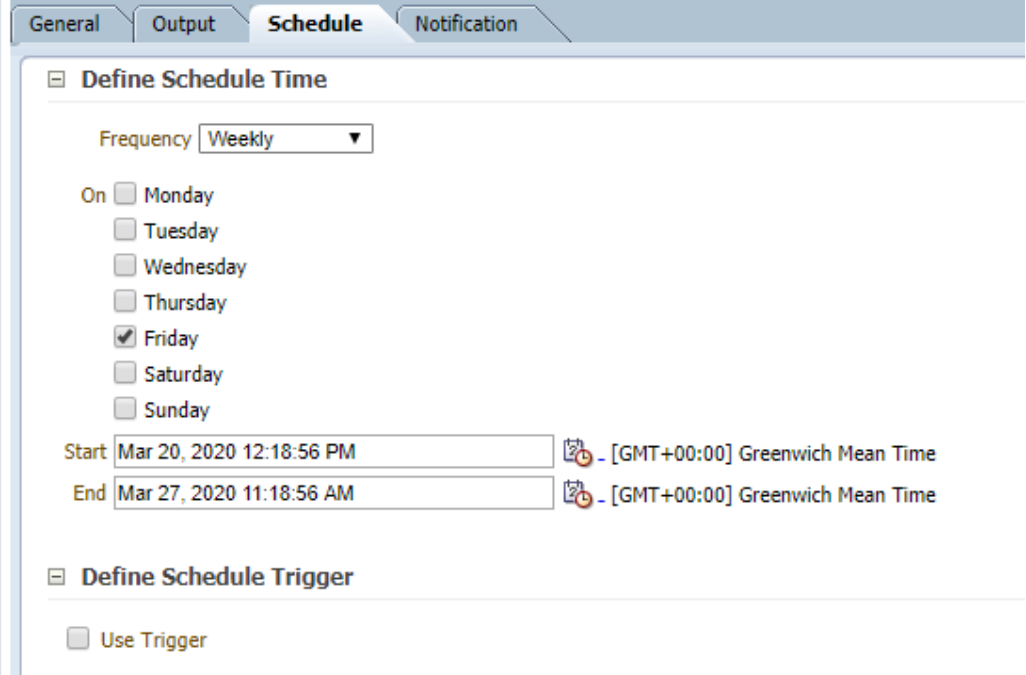
Users can schedule their report immediately after building their report, or if they have one already saved and wish to set up a new schedule, scheduling can be accessed by selecting Report Job from the New drop down.

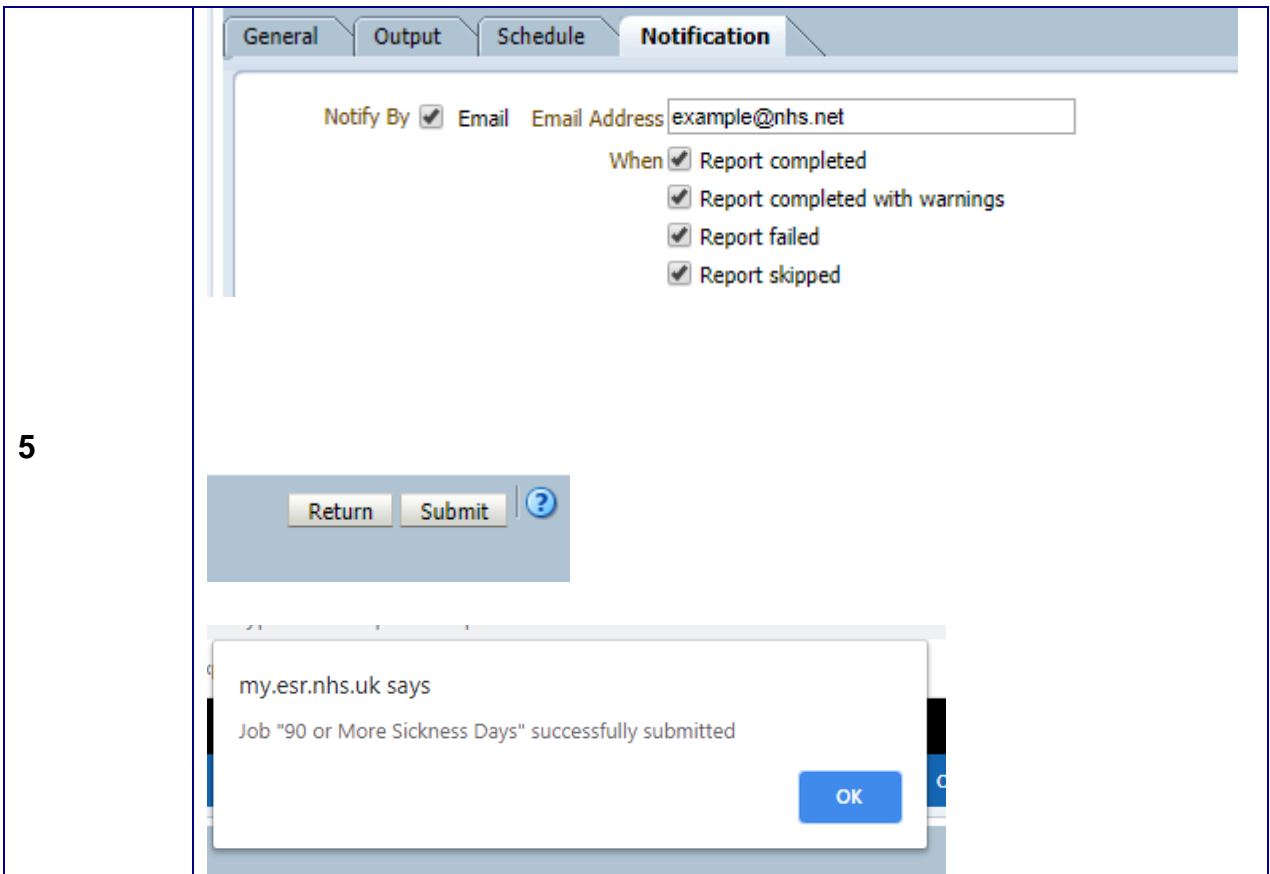
A schedule can be edited, paused, or deleted from the following locations:

1. Global Header (Open – Report Jobs)
2. Home Page (Browse/Manage – Report Jobs)
3. Report Viewer (Action Menu – Jobs)

The output of the scheduled reports will also be here.

Step / Action	Example Screen / Action Description
1	 <p>The screenshot shows a context menu for a report with options: Edit Report, Edit Layout, Export, Send, Schedule (highlighted), Jobs, Job History, Republish from History, and Share Report Link. To the right, a sidebar menu lists various report types, with 'Report Job' highlighted under the 'Published Reporting' section.</p>
Action 1	<p>Once the report has been built, select the Interactive icon in the top right corner and select Schedule.</p> <p>This option is available on the right hand side whether users created their report with a Data Model or Subject Area.</p> <p>For users who already have a report saved but are yet to schedule it, Report Job under the New dropdown will direct them to the same screen.</p>
2	 <p>The screenshot shows the 'Schedule' tab of a report configuration window. The 'Report' field contains the path: /~NHSCHAMPTON01/Sickness 90 Days.x. Below the field is a 'Parameters' section.</p>

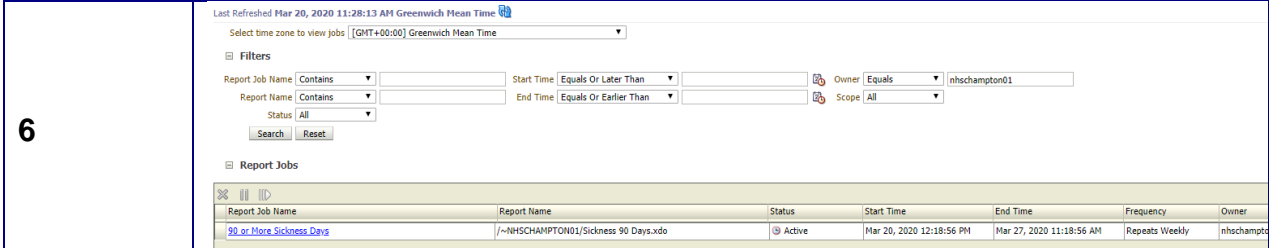
Action 2	The General tab will automatically be populated with the saved report file.
3	
Action 3	<p>Under Output, users can select the format.</p> <p>Save Output allows the data to be saved for republishing. This will allow the report to be published in a different format without having to re-create the report.</p>
4	
Action 4	<p>In the Schedule tab, users will need to define the schedule time.</p> <p>This includes:</p> <ul style="list-style-type: none"> • Frequency: once, hourly, daily, weekly, monthly, annually or specified dates • Start date • Use of triggers (if parameters set) • Retrying



Action 5

Under Notification, users will be able to set up any notifications should they so choose.

This will alert the user to the report completing as well as any failures.

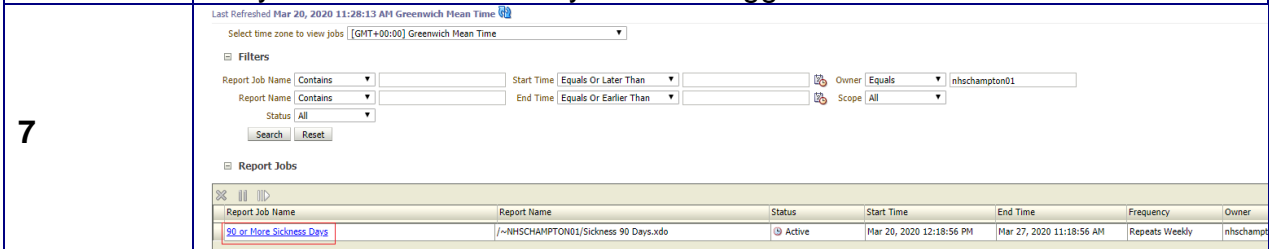


Action 6

Once saved, all scheduled reports can be accessed by opening Manage Report Jobs.

Here the reports can be deleted, paused and restarted.

Only schedules created by the user logged in will be visible.



Action 7

The output of the scheduled reports can also be accessed via Manage Report Jobs.

Users can access the results by clicking the hyperlink for the report.

If 'Save Data for Republishing' was selected in Action 3, users will be able to republish the report in a different format from this screen.

