# ESRBI Basic Report Running Workshop

## Script

### Introduction (00:00 – 00:29)

In the accompanying video, we have used a copy environment. This means that all the data is fictitious and at points there will not be the same quantity of data that you may expect in your own VPD.

We are going to be going through a selection of Dashboards and using them to look at different functionality that is available across all Dashboards. The functionality is universal and can be applied to all Dashboards.

For an extensive list of what URPs have access to which Dashboards, as well as descriptions of all analyses –this is available via the ESR BI Online Guide.

We will start on the Introduction to ESR Business Intelligence Dashboard page, which is where you will land after logging into ESR BI.

By selecting Dashboards, you will see all the Dashboards available to yourself, dependent on the URP you are using.

I am using the BI Administration URP so I have all the available Dashboards.

### Absence Dashboard (00:29 – 08:18)

Index page (00:29)

We will start on the Absence Dashboard. The Absence Dashboard has a pretty typical set up; with an index page, Summary and then a range of detail pages which cover the subject matter.

We are going to use this Dashboard to look at Prompts.

Detail page (00:59)

If we go to the Detail analysis we can see how the Prompt there affects the result of the analysis.

The Prompt is the object you see at the top of the page with:

* Drop downs
* Radio buttons
* Free text fields

The prompt allows you to filter the results of the analysis on the page that you are on. Most Dashboard pages will have this typical layout with the Prompt being at the top. There are also some Prompt features which will almost always be the same.

For example:

* Organisation will always include all values, so all Organisation names within the VPD will be returned
* Assignment category will always exclude bank, honorary and locum members of staff

Later on in this Workshop we will go through how we can customise prompts, so when you log in it is personalised to you and your requirements

Example:

1. Amend the staff group to admin and clerical and see how this affects the analysis.
2. As it stands now the staff group includes all column values: estates and ancillary, A&C.
3. Click on the prompt, select the staff group that we wish to use and then press apply and run the analysis.
4. The analysis now only shows administrative and clerical members of staff.

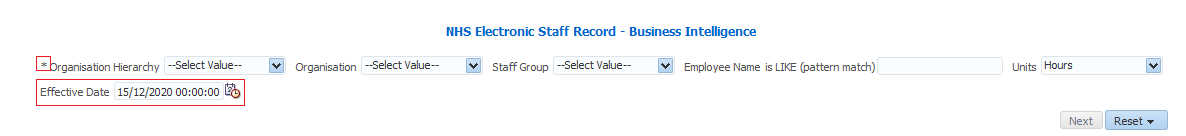
Date Prompts

One thing to note on the Absence Dashboard is the date prompt.

For most pages it will use the ‘between operator’ so the date IS BETWEEN two values. This means that the results of this analysis will be absences between 1/9/2019 and 31/8/2020. This is typical for the Absence Dashboard, however there are a few examples where we use an effective date (which is how most pages on other dashboards work) – this just means that the information in your analysis is correct as at the date you have selected.

Annual Leave Balances page (03:40)

To have a look at effective dates, we will look at Annual Leave Balances. Annual Leave Balances is built slightly differently in two ways:



1. Asterisk – denotes that the prompt has to be completed prior to the analysis being run
2. Built using the Real Time Subject Area – so the data is coming straight from ESR. You may find that these analyses are slightly slower to complete.

Other analyses which use an effective date but are not built using the Real Time Subject area, will have information as up to date as specified on the Introduction to ESRBI Dashboard page.

Set the effective date and ESR will return the information as of that date

Individual Absence Record page (06:20)

Another analysis that works slightly differently with the date prompt is the Individual Absence Record.

The Individual Absence Record is unique in that it has two date prompts.

1. Effective Date – which will return assignment information as at the date specified
2. Absence Date between - will return absences that have occurred in between these two dates.

Example:

In the example we have set the effective date to 1 June 2020 and Absence Dates between 1/9/2019 and 31/8/2020.

This will return the absences in the defined period and assignment information as of 1 June 2020. Assignment information may change dependent on the date specified. We could set effective date to the beginning, middle or end of the absence period and the data returned may be different.

Compliance Dashboard (08:18 – 20:18)

Index page (08:18)

We will now have a look at the Compliance Dashboard, the analyses here and what happens when we export them.

The Compliance Dashboard is very similar to the Absence Dashboard in terms of layout. It has an Index, Summary and wealth of detailed pages.

Various URPs have access to this Dashboard including:

* Manager, Admin and Supervisor Self Service
* Career management
* Learning administration
* HR admin and Management
* BI Admin

We will look at three pages, what they have to offer, how they are set up and what happens when we export these.

Competency Matching page (09:15)

Competency matching has two analyses.

1. Learning Compliance Matching. This includes the requirements set against a person as well as the matching status, level required, level achieved and the expiry date.  
     
   It also shows where the requirement is inherited from. In this example we can see that it states “NHS Business Group” which means all employees across the organisation will have this requirement.
2. Non-Requirement Competencies. This returns where the competency has been achieved but is not a requirement.

Both of these analyses are set up with a table view – with the columns across the top and the detail in the body of the analysis.

This is different from the analyses on the Selective Competency Matching page as they are set up in a pivot table view.

Selective Competency Matching page (10:40)

We have to select the competencies before we can run the analysis – so this is similar to what we saw in the Absence Dashboard.

We are going to use some pre-selected competencies:

* Fire safety
* Information governance
* Adult safeguarding

Once the competencies have been selected, users will need to press apply on the prompt.

This page has both a summary and a detail analysis and it only lists required competencies. It identifies whether the competency is a match – so whether the employee has achieved the competence, required, or expired – these are conditionally formatted as red, amber or green

The summary shows the percentage of attainment for the selected competencies.

It does not show where a competency has been achieved but is not required.

Example:

As we are using a copy environment we are not really getting meaningful information. What we can see is that the Adult Mental Health organisation does have some results so what we can do is filter the analysis to show only this Organisation.

To do this we go to the second page of the Prompt and under Org Level 2 we select the Organisation. In this example I have selected the Adult Mental Health organisation.

The results are now refined to only this Organisation.

In this Dashboard we are also able to amend two other types of Prompts.

1. Expiring Soon. We are able to define the number of days for ‘Expiring Soon’. By default this is set to 90 days. This will affect the analyses and at which point competencies are defined as ‘Expiring Soon’.
2. RAG Indicators. Users are also able to define the RAG (red, amber, green) threshold. In the example we change the threshold for amber to 15. This means that where the competency attainment is at 15% or greater, it will show as amber.

In the detail analysis green shows as a match, amber is expiring soon, and red indicates where the competence has not been attained and is required.

In the detail analysis also returns dates. In most cases this will be the date that the competency is due to expire.

If it states ‘BKD’ before the date, it is the date of a future enrolment for the employee and the competence is set to be renewed.

Positions without Requirements page (14:53)

This analysis will return positions where they do not have the requirement set.

In the example on the video, no results are returned as the competencies we selected earlier have come through to this page of the Dashboard and all the competencies we selected earlier were mandatory so we would expect that all positions would have these set against them.

As a demonstration we need to pick a competency where we would expect that not all positions would have it as a requirement. We have selected Basic Life Support. We would not expect that all positions would have this set as a requirement.

For this analysis we can also set the mode.

* All – where the positions do not have ALL the competencies as a requirement
* Any – where they do not have at least one of the competencies selected
* Some not all – where they have some but not all of the competencies selected – this has been added very recently since we did the original run.

The analysis then returns the positions that do not have the competency or competencies selected dependent on the mode.

Exporting (16:45)

We will now have a look at what happens when we export these different analyses. First we will look at what happens when we export Positions without Requirements which is set up in a table format.

* Export via Excel – we can see that the analysis has retained the table layout and the formatting as it was in BI
* Export via CSV – when we export via CSV we are only exporting the raw data. The layout is the same when exporting the table via CSV but we have lost the formatting.

Now we will look at what happens when we export a pivot table in the same way (Selected Competency Requirements). (17:46)

We need to amend the competencies to the ones we were using earlier as we know there are results and values there.

Both the summary and detail analyses are set up in a pivot table view.

* Export via Excel – just like Positions Without Requirements, the export has retained the layout and has retained the conditional formatting in the form of the RAG
* Exporting via CSV - only the raw data has been exported. As a result we have lost the conditional formatting as well as the pivot table view.

Users may wish to export via CSV as it is faster, and some users experience error messages when exporting large files to Excel. For most scenarios it is appropriate and we recommend exporting via CSV. However be aware that if you are exporting a pivot table via CSV you will lose the pivot functionality and will only get the raw data.

Staff in Post Dashboard (20:18 – 27:01)

Summary page (20:18)

On the Staff in Post Dashboard we will look at three different pages:

* Staff List
* Detail
* Supervisor hierarchy

We will use Staff List and the Detail to look at granularity.

We often get asked by users “why are some analyses based on employee number whilst others are based on assignment number?”. The analyses are set up differently for several reasons:

* Sometimes it is not appropriate to go into a greater level of detail – for example summary analyses it may be more appropriate to use an employee number rather than an assignment number.
* Adding the assignment number, and information such as supervisor, supervisor email address, Organisation, values that are held at assignment level, is more appropriate for a detail analysis

A good example of this is Continuous Service Dates (CSDs). CSDs are reported at employee level. If we were to create an analysis with just employee number and the continuous service date for 3 months , they will be returned once.

If we were to add assignment number to the same analysis, they would return the same number of times as the person has assignments. If an employee had three assignments, the same continuous service dates would be returned three times. Once for each assignment

There is no need to go to the level of detail of including the assignment number. Therefore it is more appropriate to only include employee number and sufficient for our needs.

Staff List page(22:18)

The Staff List and the Detail are very similar analyses and include a lot of the same information for example: assignment number, assignment status, organisation and position.

However the detail goes into a greater level of detail and includes more fields.

The reason we have two similar analyses is because the Staff List is designed to be a quick, easily run analysis. Whereas the detail provides more information.

For the next example we are going to focus on employee number ending 530.

They are returned twice on the Staff List. Once where the primary assignment is set to yes, and again where it is set to no. They are working at the same band within the same organisation.

For this example, please review the video content as it will show the assignment information.

Detail page (23:39)

The Detail will provide more information. Employee Number ending 530 is again returned twice. The more information provided, the lower the level of granularity.

For this example, please review the video content as it will show the assignment information.

In the example we can see that they have two supervisors, and as a result two supervisor employee numbers.

The Detail analysis also includes the address. It is restricted to only return one, however employees may have several addresses. If we created an analysis from scratch we could include all the addresses and that would go to an even lower level of granularity as we are providing more information. For this detail, it is not appropriate to include all addresses.

To summarise:

Granularity is the level of detail. The more information and the more specific that information is, the lower the level of granularity.

Supervisor Hierarchy page (25:43)

We are often asked how users can identify assignments where there is no supervisor specified.

To do this go to the Assignments with a Supervisor by Organisation analysis. They list all the Organisations and the number of assignments, whether they have a supervisor or not.

Example:

We have selected the Adult Mental Health organisation. On the left it will list all assignments without a supervisor, and on the right those with.

It’s important to note that this only works where the Organisation has fewer than 200 employees.

Management Overview Dashboard (27:01 – 28:50)

The management overview dashboard is available to Manager, Supervisor and Administrator URP holders. It provides an overview on KPIs, indicating performance, as well as printable and scorecard analyses.

The prompt also has the ability to amend the RAG indicators as we saw earlier.

We are briefly covering this Dashboard as it provides a quick guide to managers explaining the layout of the Dashboard. It is a good place to direct managers to if they are yet to start using BI.

The guide covers:

1. The various different pages of the dashboard
2. The prompt
3. The various pages of a prompt and how to apply filtering such as the RAG threshold
4. As well as explaining the summary analyses

You may wish to direct managers here if they are new to BI. We are now going to have a look at the Staff Requirements Dashboard. Here we are going to look at customising prompts which is another feature that you may wish to demonstrate to users.

Staff Requirements (28:50 – 33:40)

Summary page (28:50)

Managers do have access to the Staff Requirements Dashboard so that includes Manager, Admin and Supervisor Self Service. HR URP holders also have access so HR admin and HR management.

Pay progression page (29:30)

We will use the Pay Progression page to look at Customisations.

In the results of the analysis we can see that there are four different employees and two different wards. The use of customisations may appear to senior managers who look after an entire directorate and wish to create customisations to restrict analyses based on ward or smaller department.

When I worked in an Organisation I was always asked for analyses where bank members of staff were included. As we saw earlier, those with an assignment category of Bank are not included by default, so this was one of my customisations.

In this example we are going to create two customisations based on the ward or department. It is important to note that we can customise all the prompts across the dashboards. I am just using Organisation here as it is provides the best example.

Example:

Filter the results using the prompt, ensuring that you select apply.

Navigate to the top right corner and select page options, and then save current customisation. Users will be prompted to name the customisation as well as stating who it should be for, and whether it is the default on the page.

The second example demonstrates what happens if the prompt is not applied. If the prompt is not applied, and therefore the results are not restricted, the saved customisation will not be saved as intended.

Data Quality (33:40 – 36:24)

Summary part 1 page (33:40)

We have looked at all the functionality we will now look at the Data Quality page.

The Data Quality page has been updated in recent months. We have split the summary page into two to split the validations. The Dashboard does not definitively indicate whether is something is wrong. Users should use this to check their data and make a judgement for themselves as to how they should act on this. It may be a good use of customisations to remove employees from validations.

Supervisor page (35:03)

The Supervisor page identifies any loops in the hierarchy. This is when an employee manages another employee but is simultaneously managed by them at the same time. So the same employee appears twice in the hierarchy.

In BI, clicking on the affected employee number would provide a detail of all the affected employees in the loop. As this is a copy environment we cannot do this here now.