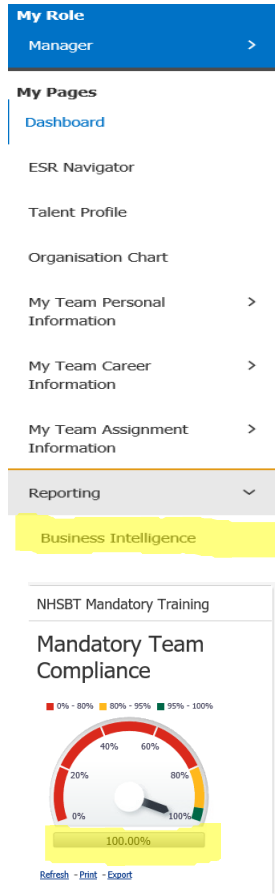
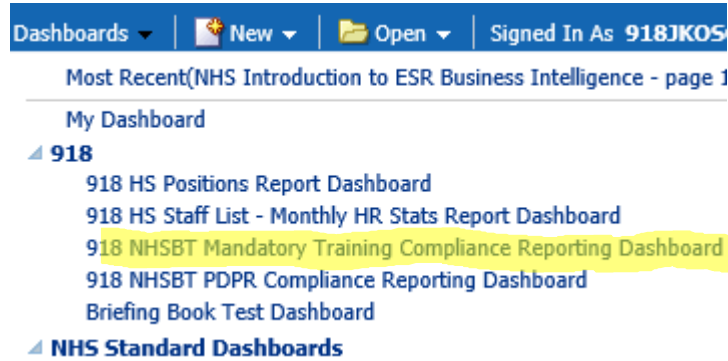


# Mandatory Training Competency overdue or date due for refresher

Step 1 – open the Dashboard – there are two ways that this can be accessed:



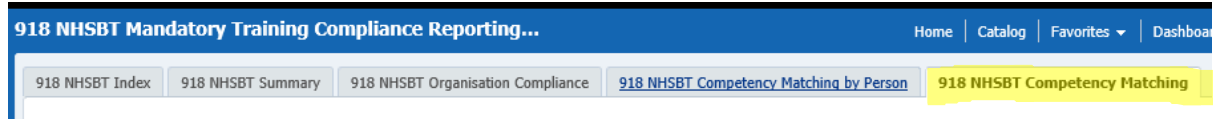
1. Launch Business Intelligence Reporting and open the Dashboard – **918 NHSBT Mandatory Training Compliance Reporting Dashboard** from the menu options from your Manager Role – Reporting>Business Intelligence



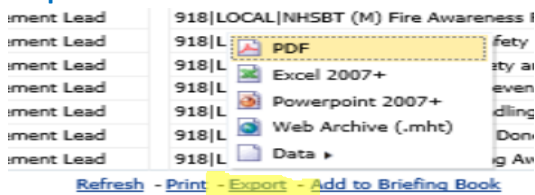
**OR**

2. From your Manager Portlet by clicking on the Grey % sign.

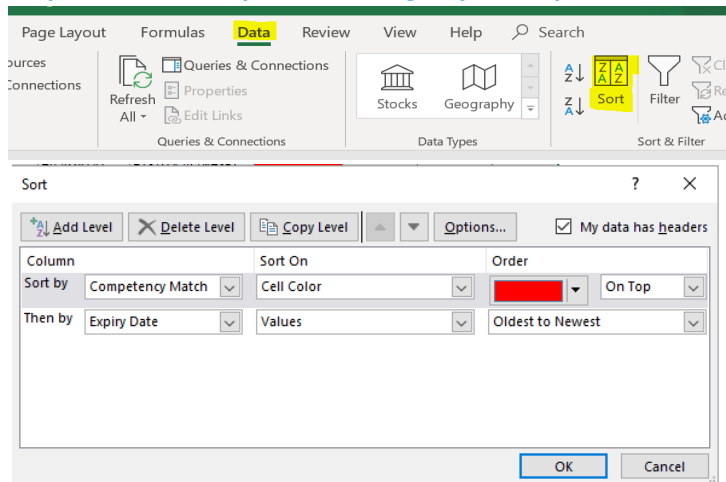
Step 2 – View the 918 NHSBT Competency Matching report



Step 3 – Scroll to the bottom of the table and select the option Export and then select Excel



Step 4 – Sort the report according to your requirements



Click on menu option 'Data' and then 'Sort'.

Remove any empty columns (you may also want to remove the blank top row).

You can sort by Cell colour – to identify any competencies that have expired and then by expiry date to identify any competencies that are due to expire.

**Points to note:**

1. 918 NHSBT Mandatory Training Compliance Dashboard automatically excludes anyone who has 28+ days sickness absence or other types of absence e.g. maternity leave. If you want to view your team including those who are on Long Term Sickness absence etc. amend the filters as follows:

Initially amend the Assignment Status by clicking on the arrow tick

**NHS Electronic Staff Record - Business Intelligence**

Organisation(s) (All Column Valu... Assignment Category Fixed Term Temp;P... Person Type(s) Employee;Employee... Employee Person Type(s) Employee;Employee...  
Assignment Status NULL;Acting Up;Acti... Primary Assignments Only --Selec... Role (All Column Values)... Assignment Number (All Column Values)...  
Employee Number (All Column Values)... Supplementary Role --Select Value--... Employee Location --Select Value--...  
Next Apply Reset

Select options to also include:

Assignment Status NULL;Acting Up;Acti... Career Break and Maternity & Adoption and then Apply the changes  
Employee Number (All Column Valu...  
[x] NULL  
[x] Acting Up  
[x] Active Assignme...  
[ ] Applicant Withdr...  
[ ] Application Pack  
Search...

To include anyone who is on Long Term Sickness Absence delete the date “Exclude Open Sickness Absence – start date” and then Apply the changes

Effective Date (Historical Dates Only) 09/03/2020 00:00:00... Competencies 918|LOCAL|NHSBT |...  
Competency Framework(s) LOCAL;CSTF... Employee Hire Date <= 09/03/2020 00:00:00...  
Exclude Open Sickness Absence - Start Date <= 10/02/2020 00:00:00... Essential --Sele...  
Apply Reset  
Group by Area Of Work... and Position Title... and... OK

2. A separate report is available for PDPR reporting- 918 NHSBT PDPR Compliance Reporting Dashboard.