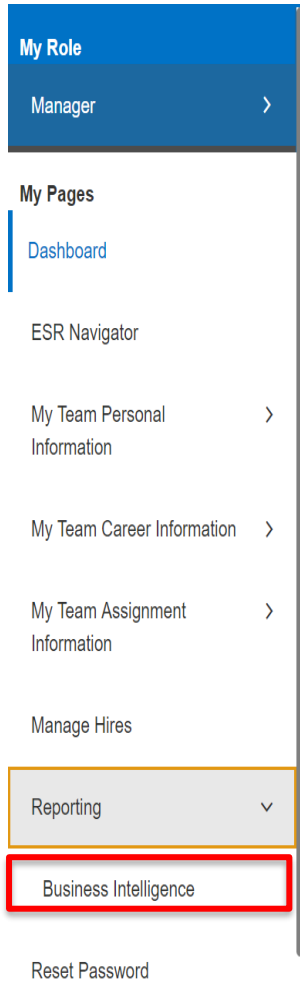


A thick, blue, wavy line that curves across the top of the slide, starting from the left edge and ending at the right edge.

Access Compliance Reports via ESR Reporting

Reporting



TIP: you need to have Upgraded to your Manager view to see these options – if you don't know how to do this book on to a [Manager Skype call \(found on People First My ESR page for Managers\)](#)

- Manager view shows menu option 'Reporting'
 - Business Intelligence

Reporting cont ...

Search All [dropdown] [button] Advanced Help [dropdown] Sign Out [button]

Home | Catalog | Favorites [dropdown] | **Dashboards** [dropdown] | New [dropdown] | Open [dropdown] | Signed In As 918IHARPER01 [dropdown]

Most Recent(NHS Introduction to ESR Business Intelligence - page 1)

My Dashboard

- 918
 - 918 NHSBT Absence Triggers Dashboard
 - 918 NHSBT Mandatory Training Compliance Reporting Dashboard
 - 918 NHSBT PDPR Compliance Reporting Dashboard
 - Dashboard
 - Payroll Reports
- NHS Standard Dashboards**
 - NHS Absence Analysis Dashboard
 - NHS Absence Dashboard
 - NHS Certifications Analysis Dashboard
 - NHS Compliance Dashboard
 - NHS Compliance Trending Dashboard
 - NHS Education and Learning Dashboard
- NHS Introduction to ESR Business Intelligence**
 - NHS Management Overview Dashboard
 - NHS Medical & Dental Dashboard
 - NHS Pay Bill Dashboard
 - NHS Professional Registrations Dashboard
 - NHS Qualifications Dashboard
 - NHS Staff in Post Dashboard
 - NHS Staff Movements Dashboard
 - NHS Staff Requirements Dashboard

...R, transforming it into valuable management information. Greater assistance of National Special Interest Group Chairs providing a broad...

The following changes have been made to the NHS Standard Dashboards... been added to the Flu Vaccinations pages within the NHS Workforce... used to remove long-term Sickness Absence. Users should enter a... ed Sickness Absence beginning before the date entered.

The following changes have been made to the NHS Standard Dashboards... s been added to the Data Quality page within the NHS Learning Adr... signed to help users identify employees booked on two or more clas...

The following changes have been made to the NHS Standard Dashboards... ns pages within the NHS Workforce Profile Dashboard have been up... and Influenza Date Between prompts.

Click on;

- 'Dashboards' then
- 918 then
- Choose Mandatory or PDPR compliance report

Reporting cont ...

ESR Business Intelligence Reporting Search All [dropdown] [input] [button] Advanced Help Sign Out

918 NHSBT Mandatory Training Compliance Reporting ... Home | Catalog | Favorites | Dashboards | New | Open | Signed In As 918IHARPER01


918 NHSBT Index | 918 NHSBT Summary | 918 NHSBT Organisation Compliance | 918 NHSBT Competency Matching by Person | 918 NHSBT Competency Matching

NHS Electronic Staff Record - Business Intelligence

This dashboard has been designed for NHSBT to provide users with intelligence around compliance levels within the organisation.

Compliance reports are available in four different categories identified below:

- Summary**
[918 NHSBT Summary](#)
This provides an overall % of your team compliance, together with information about mandatory training due to expire
- Organisation Compliance**
[918 NHSBT Organisation Compliance](#)
This provides a breakdown of compliance and can be filtered to change this by various options e.g. Directorate, Department, Position Title
- Competency Matching**
[918 NHSBT Competency Matching by Person](#)
This provides a breakdown of compliance by person so that you are able to view details of required vs achieved and % compliance
[918 NHSBT Competency Matching](#)
This provides a list of all competency requirements for each person and their % compliance
- Default Report Settings**
Default Report settings include the following in calculating NHSBT's MT compliance:
 - Fixed Term and Permanent employees
 - Sickness Absence pre-calculated to exclude anyone with absence of 28+ days
 - KPI settings of Green >=95%, Amber >=80% <95%, Red <80%
 - Competencies (mandatory training) measured by NHSBT
 - Effective date of the report set to the day you are running it
- Options to Group By**
Within the reports you can group data by a range of options.
Here is an overview of some of the options used by NHSBT to manage staff department structure:
 - Organisation = Department
 - Org L1 = NHSBT
 - Org L4 = Directorate
 - Org L5 = Function

- Various dashboards and information
- Summary or index of each Dashboard on 1st sheet
- Go to relevant tab – brings up report
- **TIP:** there may be more options to chose from, click on the  at the end of the tabs onscreen

Reporting cont ...

ESR Business Intelligence Reporting

918 NHSBT Mandatory Training Compliance Reporting ...

918 NHSBT Index

918 NHSBT Summary

918 NHSBT Organisation Compliance

- To View Team Mandatory Training Compliance – click on the ‘Summary’ tab

Compliance

Effective Date (Historical Dates Only) 05/12/2019 00:00:00 Competencies 918|LOCAL|NHSBT |

Competency Framework(s) LOCAL;CSTF Employee Hire Date <= 05/12/2019 00:00:00

Exclude Open Sickness Absence - Start Date <= 07/11/2019 00:00:00 Essential --Sele |

Apply Reset |

Assignment Count	Required	Achieved	Compliance %
2	21	21	100.00%

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

- Assignment Count – number of people in the department
- Required – number of training needs that are required for compliance
- Achieved – number of training needs that have been completed
- Compliance% - overall compliance for Mandatory Training for department

Reporting cont ...

Assignment Count	Required	Achieved	Compliance %
2	21	21	100.00%

[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#)

- If you want to export the report into excel use the 'Export' button

- If you want to view the Compliance by employee click on the '918 NHSBT Competency Matching by Employee' tab

918 NHSBT Index 918 NHSBT Summary 918 NHSBT Organisation Compliance **918 NHSBT Competency Matching by Person** 918

NHS Electronic Staff R