

Top tips for a successful implementation

You need to consider the following now, in anticipation of the implementation of ESR in your organisation.

■ **Assess local requirements** - Examine the type and formats of the built-in reports to determine if they meet local needs, or if additional ones need to be defined using Discoverer.

■ **Derive a reports schedule** - The Discoverer tool contains scheduling functionality that so that reports can be timetabled to run immediately or at a later date. With this facility it should be possible to draw up a schedule for all local reports on a daily, weekly, monthly or annual basis.

These are actions relevant to the Local Reports function of ESR. Other factsheets in this series describe actions to be considered with regards to other capabilities.

For further information relating to ESR, please contact your local Account Manager or visit the ESR website on www.esrsolution.co.uk



LOCAL REPORTS



ESR Local Reports allow processes to be **monitored** and for management to be **empowered** with **focused** and **accurate** statistics

OVERVIEW

ESR can produce reports at a local level, drawing on information that is only relevant to a single NHS organisation. They include process reports (e.g. payroll exceptions) and management statistics (e.g. labour turnover).

There are over 250 reports built into ESR, but others can be easily designed and produced at a local, regional or national level using a tool called **Discoverer**.

Information is also collated nationally in a computer system called a Data Warehouse. Statistics can be drawn or derived from the Data Warehouse that cover the whole of the NHS nationwide – eventually including the entire 1.2 million-strong workforce. The Data Warehouse is described in another factsheet in this series.

WHAT IT LOOKS LIKE


Reports are grouped into Business Areas, including:


- Absence Management ■ Education and Training ■ Finance Reporting
- Human Resources ■ Payroll ■ Recruitment ■ Talent Management

One or more **Workbooks** define the reports that cover the different elements of each Business Area – for example, Human Resources has workbooks covering starters, leavers, organisational profile etc. Each workbook includes one or more reports – for example, the “Leavers” workbook includes reports that analyse leavers in relation to equal

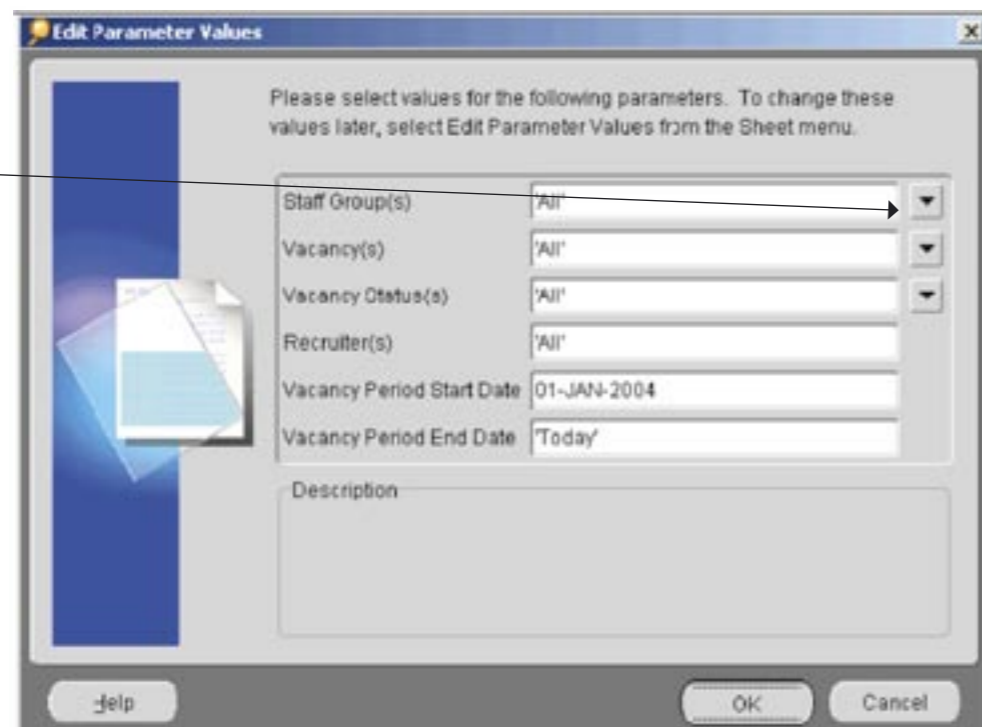
opportunities, length of service and leaving reason.

Discoverer allows a user to set **parameters** for each report that enable a focus on the specific data required. For example, the parameters may restrict the information to a particular staff group or to certain dates.


 The parameters specify the criteria for the report – e.g. by limiting the information to certain staff groups or dates.


 Drop-down menus are available for some parameters, easing data entry.


Setting Report Parameters

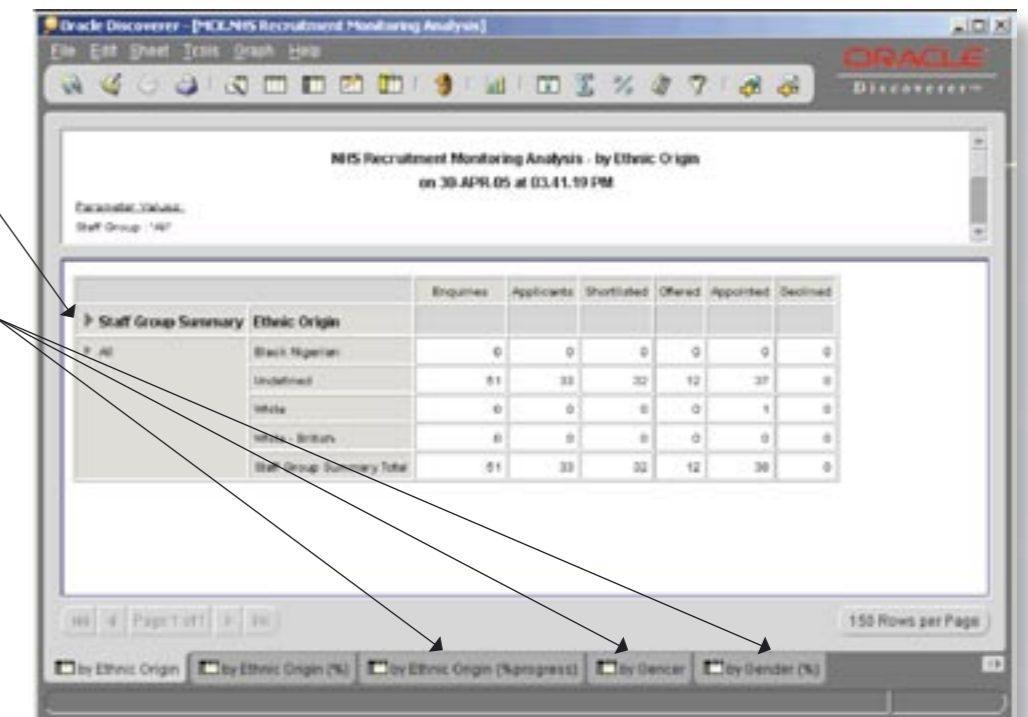


Example Workbook

 This workbook deals with the reports covering the monitoring of recruitment.


 Users can drill down further to get more detail where there is a title marked with a “▶”

 Each workbook contains one or more reports, which are shown as “Tabs” at the bottom of the page.



	Enquiries	Applicants	Shortlisted	Offered	Appointed	Declined
▶ Staff Group Summary						
▶ All						
Black Nigerian	0	0	0	0	0	0
Unclassified	51	33	22	12	27	0
White	0	0	0	0	1	0
White - British	0	0	0	0	0	0
Staff Group Summary Total	51	33	22	12	28	0

Example Report

 This report shows the status of interviews, broken down by vacancy, across the organisation.



Staff Name	Interview Title	Interviewer	Where to report to	Location
Blank, No. year	19:00	Sara, Ms. South, Anthony, M. Simon,	Main Reception	004 (N) 0100
Leaving, No. Vac	00:00	Sara, Ms. South, Anthony, M. Simon,	Main Reception	004 (N) 0100