

Customer webinar: Power BI report updates in Console

Mark Abrahams, Head of
Research and Analytics

27 April 2022





Welcome to the 'Aptem Power BI reports' webinar

To help you make the most of this session:

1. We will be recording this session and sending a copy to you, so you can share with colleagues.
2. You are muted, so if you need assistance during the webinar please use the chat function in the right hand panel.
3. There will be an opportunity to ask questions at the end of this session, please put your questions in the right hand panel.
4. If we don't have an opportunity to answer all questions during the session we will follow up individually afterwards.

Today's hosts



Mark Abrahams
Head of Research and Analytics

Extensive experience of applying data analytics to training, recruitment and apprenticeship programmes to identify predictive trends and support organisational efficiency.



Hardeep Kondal
Marketing Apprentice

This is Hardeep's premier helping to host a webinar. He works in the marketing team at Aptem, supporting a range of existing customer activities including training and monthly customer summaries.

Purpose of today's session

Introduction to the Caseload, Funding, Compliance and Quality dashboards

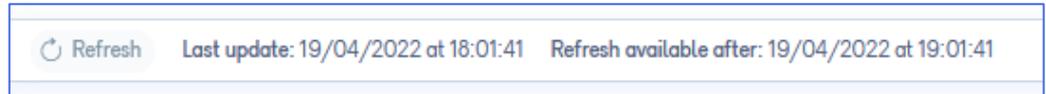
- What data and insights can you get from the Aptem Power BI reports?
- Tips and tricks for getting the best out of a Power BI report.
- What additional data and reporting can you access beyond the dashboards in Console?

What is Power BI?

- Power BI is a Microsoft product for visualising data. Data can be imported from a range of sources, e.g. Excel files, web services, databases.
- There are four reports available in Aptom. In Console they need to be enabled individually on your administrator account.

Note: As of last week's update the Power BI reports are no longer available in Aptom Classic.

- Reports present data from the last occasion they were refreshed. This can mean data can be a few weeks old. You will need to click on the 'refresh' button. It is not automatic.
- Security restrictions mean that the reports only show data from groups visible to your admin account. Changes to your account's group structure can alter data visibility.



Purpose of the Power BI Reports

To allow Aptem customers to quickly access headline data to enable the efficient management of their business.

- Reports are standard across all Aptem customers.
- Different customers have varying processes – so these reports present high-level metrics, whilst allowing you to filter and drill down to specific groups and cohorts.
- These reports allow access to multi-record data, e.g. all ILR aims, which cannot be done in the User Generic Report (Classic).
- View live data from your Aptem account.
- Underlying data from the reports can be exported in Excel format for record keeping purposes.

Caseload Report

Purpose

- Report on caseload counts (in learning / withdrawals / Breaks in Learning).
- Provide an Occupancy Report.

Criteria can be:

- ILR main status.
- Aptem Programme Status (as defined by admins / process automation).

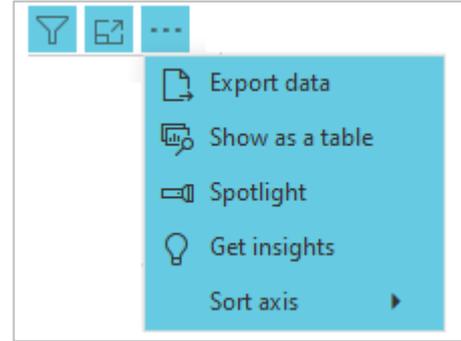
Recent additions:

- Overview by Programme Status tab.
- Occupancy Report tab.
- Data Checks tab – flag potential mismatches in between ILR status and programme statuses.

Using a Power report

BI

- Our reports have multiple pages, displayed as tabs at bottom of each report.
- Clickable filters:
 - Click to select one option.
 - Ctrl + click to select multiple options.
 - Many pages have a “Reset filters” button (usually positioned top right).
- Charts/Tables update according to selected filters:
 - Note: Clicking on a data point in a table will filter the data presented
- Usability features: Mouse over top right of any table / chart to view options.
 - Focus Mode – zoom to display only the chart / table. Display chart as a table.
 - Sort by – select how to sort the data.
 - Table drill downs.
 - Export data – to xlsx format.



Caseload Report: Demonstration of features and pages

aven. Reports Caseload Compliance Funding Quality Employ

Refresh Last update: 14/02/2022 at 08:55:52 Refresh available after: 14/02/2022 at 09:55:52

Funding Status

- In funding
- learner
- No start date
- Unknown/Excluded I/R

Case Owner All

Subscription Status Cancelled Expired FullUser Invited Prospect

Note: When using the filters, to select more than one option use CTRL key with

Caseload Limit 30

Programme start date 6/07/2019 6/10/2022

Planned end date 7/01/2022 3/01/2025

Groups Filter

- Cohorts
- Delivery Centres
- Organisational Hierar...
- QA Groups
- Sub-contractors

Caseloads

Legend: Live Learners (blue), Learners with excluded or no I/R (orange), Caseload Limit (red line)

Caseload Overview

Caseworker name	Live Learners	New Learner	Learners past planned end date	Learners within planned end date	Learners with no I/R or excluded I/R	Learners with no start date	Total Totals	Learner Overdue	Le...
Mike Sims	20	0	0	20	35	0	45		
Shaun Elliott	10	0	0	10	17	1	119		
Nick Hodder	1	0	0	1	2	0	1		
Ross Fenner	1	0	0	1	0	0	1		
Mark Admin	0	0	0	0	2	0	0		
Total	32	0	0	32	54	1	166		

Learner demographic

Map of the United Kingdom showing learner locations.

Help on this page

- Reset filters
- Total learners: 1
- Leavers with full achievement: 0
- Leavers without achievement: 0
- Learners on "Break in learning": 1
- Learners still on programme but past planned end date: 0
- Learners currently on programme and "in funding": 32
- Number of learners with no I/R or privately funded: 33
- Learners with excluded/unknown I/R and one or more aims: 24

Assessor Overview Caseload by Assessor Overview by Program Status Occupancy Report Data Checks

Funding Report

Purpose

- Provide funding estimates of revenue for apprenticeship, traineeship, AEB and study programme learners.

Content:

- Headline estimates by month, YTD and projected academic year.
- Detailed estimates per learner per month, including projected outcome payments. (All exportable.)
- Learner Funding Data table: Exportable table of all ILR Aim data per learner, including excluded aims.
- PMR/TNP Report: Export table of Apprenticeship Financial Records.
- Learning Aims page: A list of learning aims in the tenant identifying aim reference numbers which are mistyped or do not exist.

Funding Report: Demonstration of features and pages

aven. Reports Caseload Compliance **Funding** Quality Employ

Refresh Last update: 13/02/2022 at 13:55:04 Refresh available after: 13/02/2022 at 14:55:04

Introduction:

This dashboard provides funding estimates for all learners who are funded through the ILR via the following: Apprenticeships (levy and non-levy), Traineeships, Adult Education Budget, Advanced Learner Loans.

The calculated values match the aim values generated by FIS except for the following:

- ESFA provider weightings are applied using the value set on the 'Provider Weighting' page of this dashboard. By default the weighting factor is 1.00.
- Where funding has been devolved, then values may not match devolved variations from the ESFA formula.
- Adjustments for prior learning are included in the calculations, if an adjustment value is available for a given aim.

This report does not take account of learner postcode uplifts or delivery postcode uplifts

All tables in this report can be saved to csv format by mouse hovering over the top right corner of the table, clicking on the 'more options' '...' icon and selecting Export data.

FIS Funding Line	Aug	Sept	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	YTD	Year Total
Apprenticeship [ACT missing]	£4,200.00	£7,000.00	£7,000.00	£7,000.00	£8,866.67	£9,800.00	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£54,827.39	£109,631.00
Programme Funding	£4,200.00	£7,000.00	£7,000.00	£7,000.00	£8,866.67	£9,800.00	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£54,827.39	£109,631.00
Total	£4,200.00	£7,000.00	£7,000.00	£7,000.00	£8,866.67	£9,800.00	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£10,960.72	£54,827.39	£109,631.00

Headline Year To Date Funding Summary Funding detail - Standards Funding detail - Frameworks (May 17 o... Funding detail - Traineeships Funding detail - AEB and Study Proj

Compliance Report

Purpose

- Report on ILR Compliance status of learners.
- This report only uses the following criteria:
 - ILR signature status.
 - Commitment Statement status.
 - Written Agreement status.
 - ULN is valid, NI number exists.
 - There are valid aims in the ILR, and Start/Planned End Dates exist for the aims.

Recent additions:

- Compliance Documents tab – allows export of all available created Compliance Document names, created dates, signed dates.

Quality (Ofsted) Report

Purpose

- Provide information relevant for Ofsted and Quality reviews.

Content:

- Counts of live learners, leavers, achievers split by gender / age / ethnicity / health & LLD status.
- Success rate per main aim / qualification split by above D&I characteristics.
- ILR Destination data (Progression Destination fields).
- Learner Data Table: Underlying data of main aim, outcome status, D&I characteristics etc. per learner that can be exported.



Summary

The Power BI report allow drilldowns and exporting of underlying data within your account

Uses include:

- Checking ILR compliance statuses across all learners.
- Reviewing programme and ILR statuses for all learners / users.
- Exporting all ILR Aims to a readable Excel format.
- Reviewing PMR records and apprenticeship destination records across ILRs.
- Indicative success rates by diversity categories.

Upcoming webinars



Learning Plans

Wednesday, May 4

11am – 12pm BST



Resource Centre

Wednesday, May 25

11am – 12pm BST



Rebranding of Apprenticeships

Tuesday, June 7

11am – 12pm BST



Employer and Performance Dashboards

Wednesday, June 8

11am – 12pm BST

Questions and comments



Thank you

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