2015/16 PLICS benchmarking tool: user guide
We support providers to give patients safe, high quality, compassionate care within local health systems that are financially sustainable.
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1. Introduction

This user guide explains how to access and navigate through the PLICS benchmarking tool and how to use the functionality of Tableau, the software we have used to design and develop the tool. The tool has 12 dashboards, each with one or more views.¹

Following consultation with users of the tool in previous years, we’ve developed the tool in the following ways:

- hosting on Tableau webserver
- inclusion of specialty in the filters
- removal of peer trust anonymity
- ability to select/refine peer benchmarking group.

2. Accessing the tool

i. Navigate to the NHS Improvement website https://improvement.nhs.uk/ and select ‘My account’ in the top-right corner of the screen.

ii. If you have not already, register for an account.

iii. Once you have an NHS Improvement account set up, sign in.

iv. Navigate to ‘Your Apps’ and click on ‘Tableau Analytics’

¹ A single graph or table of data
v. When you see the ‘select a site’ screen, press enter

vi. Click on ‘Analytics Hub Products’

vii. Click on the ‘PLICS Benchmarking Tool 201516’
3. Browsing between dashboards

The screen will initially show an index of all dashboard views. Click first on the ‘User Guide’ view.

To browse to other dashboards, simply click the tab you want at the top of the report or the drop-down arrow in the top left ( ). If you are selecting a tab for the first time, you’ll see a spinning loading icon and the dashboard will take a while to appear.
4. Interacting with views

You can interact with the data in many ways: filtering, sorting and exporting to support your individual analysis needs.

4.1. Benchmark selection tab

The Benchmark selection tab allows you to select a benchmark group of trusts with which to compare your data.

Select your trust in the drop-down box at the top, the year you wish to look at and whether the costs should be adjusted by the market forces factor.

Then select one or more trusts to benchmark against using the radio button filters and the tick-box list. Please ensure you have selected your trust at the top of the tick-box list as well as clicking ‘Apply’ once you’ve selected your benchmark group.

4.2. Filtering

There are more filters on the individual dashboards. The tool uses two types of filters: drop-down and slider.

Please note:

- slider type filters only apply to the worksheet they appear on
- drop-down filters on sheets 1 to 9 apply across these sheets
- drop-down filters on sheets 10a to 10c apply across these sheets.

<table>
<thead>
<tr>
<th>General filters</th>
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<tbody>
<tr>
<td>Chapter</td>
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<td>(All)</td>
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<td>Sub chapter</td>
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<td>TFC (Specialty)</td>
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<td>Activity - your trust</td>
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**Drop-down filter**

To use this type of filter, click the arrow to open the drop-down list, then select or deselect the desired values. This filtering action will include the selected values in the dashboard. It is possible to search for a specific filter value by clicking on the drop-down arrow and entering the value you want to search for.

**Slider filter**

This filter is used by either sliding the marker on the slider bar or entering a number manually. To do the latter, click the number and a text box will appear.
4.3. Sorting

You can sort report data in a number of ways using the sorting symbols:

- Click a graph axis or report field and the sort symbols will appear in a tooltip. Select the sort option you want.
- Select multiple report values by hovering the mouse cursor over the selection. A few options will appear, one of which will be the sorting symbol.

The sorting symbols look like this: 

4.4. Dynamic functionality

Each view has dynamic functionality (sorting, keep only, exclude, tooltip). You can use these in any graph or table of data by hovering over a multiple selection of values or a single value. To select multiple values, hold down the left mouse button and drag the mouse pointer, or hold down the Ctrl key and select individual bars or fields using the left mouse button.

Hover over the selected values and a tooltip will appear giving you the following options:

- keep only – includes only the selected values
- exclude – excludes the selected values
- sort symbols – sorts selected values accordingly
- tooltip – shows relevant measure values for selected data points on the report.
4.5. Remove all dashboard filters and sorting

To remove all filters and sorting click the Revert option at the top of the page.

4.6. Downloading

You can download a view in a number of formats: an image, PDF, data file or crosstab in Excel. Click Download and then the format you want.
5. General

5.1. Zoom

To zoom into the cost versus activity scatter graph, hover the mouse cursor over the part of interest and use the zoom controls in the top-left corner. The ‘+’ and ‘−’ options zoom in and out respectively. To revert to the original view, select the home symbol. Alternatively, you can double click on any area of the graph.

5.2. Highlighting specific report areas based on colour legend

To highlight a specific report item using the colour legend, click the pen symbol in the top-right corner of the colour legend. Then select the particular item in the colour legend and the report will update accordingly by highlighting that item.

5.3. Removing dashboard filters and sorting

To remove all filters and sorting, click the Revert button at the top of the screen. To deselect any highlighted or selected report items, filters, etc, press the Esc key.
6. Further help

For more help with the Tableau server click the ‘i’ icon in the top right of the screen.