



NCDR Portal User Guide

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Introduction

The NCDR Portal was designed to meet the needs of people using specialised services data, whether that is easy access to intelligent reporting or extracting data for bespoke analysis. The flexible design of the NCDR Portal enables cross data source filters across multiple datasets, for example a simultaneous analysis incorporating both cost and activity information. Intelligent functionality including the selection of favourites and parameter setting for user alerts ensures an efficient delivery of the analytics you need when you need it.

The NCDR Portal has expanded and is now home to reports from all different areas of the NHS including all directly commissioned services.

Reporting content within the NCDR Portal is regularly updated to meet the evolving needs of commissioners.



The reports in the NCDR Portal are developed using Tableau which is a powerful and fast-growing data visualisation tool used in the Business Intelligence Industry. It helps with simplifying complex raw data into user friendly dashboards which can be tailored to customer requirements.

Members of the DPRU team work closely with internal and external customers to understand reporting specifications and can create a suite of interactive dashboards as well as maintain existing dashboards.

In April 2022 a redesigned NCDR Portal was published giving users a personal home page which allows pots to be created for storing reports in an organised way.

Homepage

Access to the NCDR portal is via the internet and the homepage can be found at: <https://ncdr.ardengemcsu.nhs.uk/>.

The home page displays contact details for support as well as links to Login and Register. Clicking on the Demo link Top the details and dates of upcoming demos.

The home page has a link to a User Guide.

Registration

To register for an account for the NCDR Portal navigate to <https://ncdr.ardengemcsu.nhs.uk/>

Then click on the Register button.

Welcome to the NCDR Portal

To access the system, please use your Okta Account. If you don't have an account please register.

User Guides

- [Registration Guide](#)
- [User Guide](#)



Or from the top right corner of web page on the blue menu bar.



This will then take you to the OKTA registration page.

New Users of the NCDR Portal who do not have an OKTA account

After selecting the Register button from the NCDR page the form below will load.

Register to access NHS England applications

Some products and services can only be used by employees of certain organisations. We may need to verify your details before granting access.

First name

Last name

Please read before choosing which address to use

- Use your work rather than personal email, where possible.
- Use the address provided to you by the main organisation you work for, where possible.
- Use your own email, not a group email address.

Email address
Enter your main email address.

Job role (main)
Select the role you have at the main organisation that you work for.

Organisation (main)
Select the main organisation you work for. If you work for a GP practice, select Primary Care Network.
If you can't find your organisation try Other (or unable to find organisation).

Terms and conditions
 I agree to the [terms and conditions](#) to access NHS England applications.

Fill in the requested details on the form and click the 'Register' button.

The details used in the "Register for an account to access NHS England applications" will be used to Sign In to the NCDR portal once registration is complete.

Upon completion of your registration form click the Register button, you will then receive the email below. Click on the 'Activate my Account' link.

Dear

Thank you for registering for the Insights Platform. Your registration request has been approved. To complete the activation of your account, you'll need to set your password and security questions:

[Activate my account](#)

If you need help, please contact our support desk: IT.Support@improvement.nhs.uk.

Kind regards,

NHS England and NHS Improvement

New Users of the NCDR Portal who have an Okta account to access NHS England Applications

Select Sign In from the blue menu bar or from the main window, use your OKTA account credentials to access the NCDR Portal.

Welcome to the NCDR Portal

To access the system, please use your Okta Account. If you don't have an account please register.

User Guides

- [Registration Guide](#)
- [User Guide](#)



Or from the top right of the web page on the blue menu bar.



Users of the Current NCDR Portal

Please use the same credentials previously used to login to the old NCDR Portal, which are your OKTA account credentials. If you are unsure of your OKTA credentials, please contact the helpdesk by emailing ncdr@england.nhs.uk

My Profile Page

Once signed in to NCDR your email address will show on the blue menu bar, in the top right-hand corner of the screen, to the side of the Sign out button. Selecting your email address from the blue menu bar will show a drop-down menu that will display two options 'My Home' and 'My Profile'.

Selecting My Home will just return you to your Home page which will be blank as default.

Selecting My Profile will enable you to view your NCDR Profile and change or update any settings.



Profile Page - My Details

When accessing the "My Profile" page it will first go to "My Details". This will show you the organisation you are assigned to, your details and access level. From the left-hand side, you can select Group Access to request access to a Group or select Change Organisation if you have changed role and moved to a different organisation.

Please note: the "State" status of your account must be 'Active' to view reports. If the status is 'Waiting for Approval' please contact your nominated Line Manager/Authoriser to ask them to Approve your NCDR Account.

If a change is made to the line manager or organisation, your account will reset and reapproval will be required to the portal and groups.

The "My Details" section will show your details captured in the Portal.

A screenshot of the 'My Profile' page. The page has a light blue header with the text 'My Profile'. On the left side, there is a navigation menu with three items: 'My Details', 'Group Access', and 'Change Organisation'. The 'My Details' item is selected and highlighted with a red border. Below the navigation menu, there is a 'State' field with the value 'Active', also highlighted with a red border. The main content area contains several form fields: 'Oikta Email Address *' (with '@nhs.net' entered), 'First Name *', 'Last Name *', 'Role *' (with a dropdown menu showing 'Admin x', 'Report', and 'Viewer x'), 'Contact Number *' (with '01216110011' entered), 'Job Role *' (with 'Helpdesk Assistant' entered), 'Job Sector *' (with 'BI' entered), 'Organisation Type *' (with 'CSU AGEM' selected), 'Organisation Code *' (with 'ODE' entered), 'Organisation *' (with 'Arden & GEM' selected), 'Region *' (with 'Midlands' selected), 'Line Manager Email *' (with '@nhs.net' entered), 'Line Manager First Name *', and 'Line Manager Last Name *'. At the bottom left of the form, there is a 'Save' button.

If you have requested the role of Report Viewer, there is an additional field visible, to record your Line Manager/Authoriser details.

The Line manager/Authoriser is required to approve this role. If you need to change these details, you can amend them on this screen.

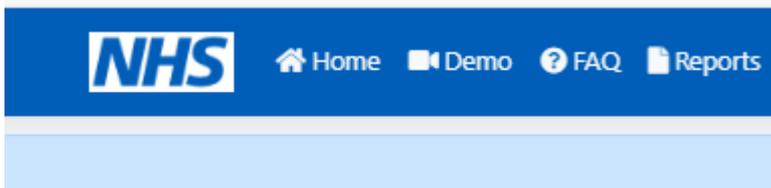
The Line Manager/Authoriser listed here is required to register for an account on the NCDR Portal and assign their Role as “Approver”.

A sole “Approver” role account does not require any further approval.

The nominated Line Manager/Authoriser will receive a notification via email and within the portal on 2 occasions:

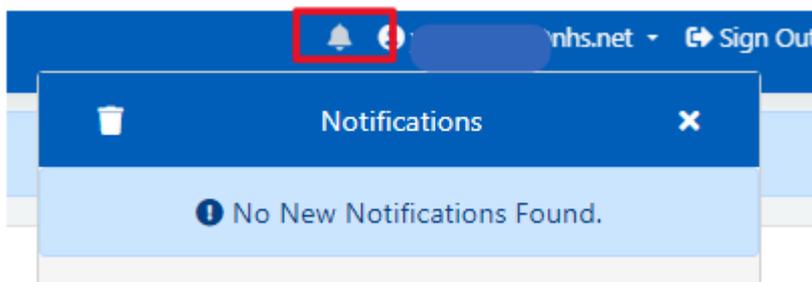
1. Initial NCDR Portal account approval
2. Access to Groups to enable you to view reports (reports are published into various Groups)

It is only once the Line Manager/Authoriser has approved the initial NCDR Portal account the Reports icon will appear in the blue ribbon.



Please note: The Line Manager/Authoriser will only receive an email notification when the access has been requested after the Line Manager/Authoriser has created their NCDR Portal account.

If the Line Manager/Authoriser has not created an account before the user’s access has been request, they will need to create an account as an approver, then log into the NCDR portal and click on the notification icon in the blue ribbon:

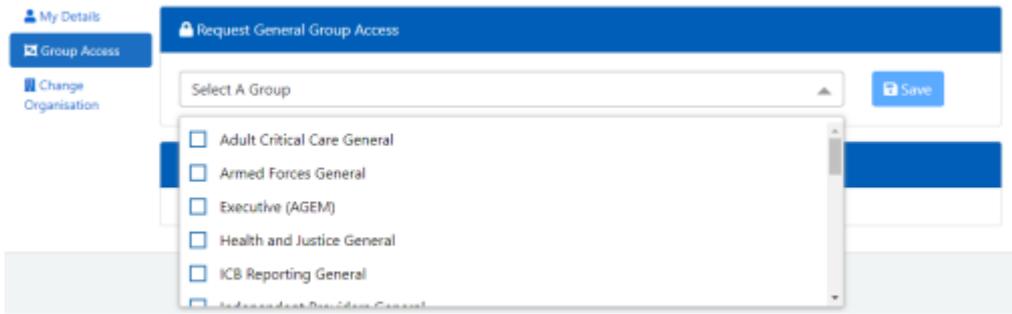


Profile Page – Group Access

From the Group Access link you can see any Groups you already have permission to access, or you can request Access to a Group.



To request access to a Group use the drop down selection menu and select the required group. Then Click Save. Once approved the Group will show in the My Assigned Groups section.

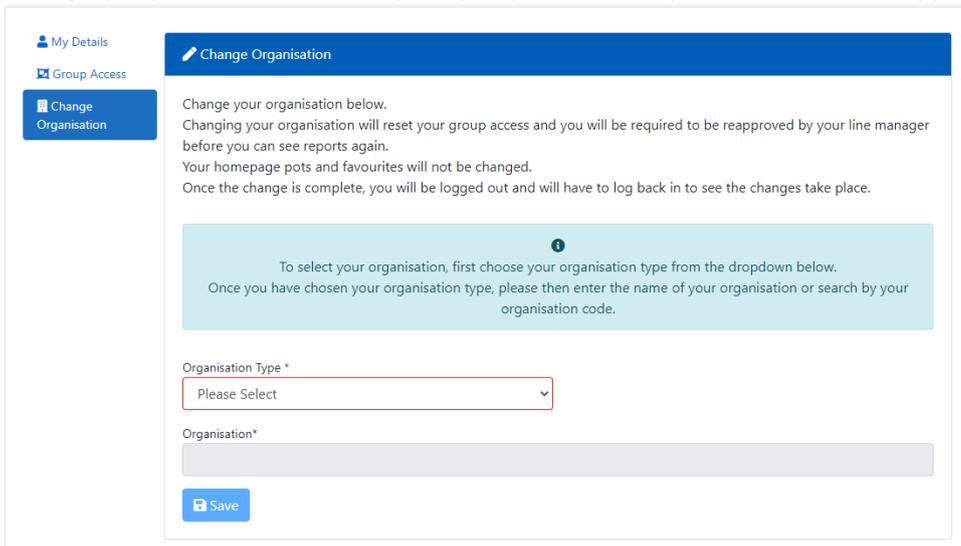


Profile Page – Change Organisation

If you change organisation this can be changed in NCDR from the “My Profile” page.

Select the organisation and type from the drop-down menu and selection search.

Changing organisation will reset your group access and you will need to be approved again by your line manager.



Menu

The menu is displayed in the dark blue bar at the top of the page and is displayed on all pages.



The Blue menu bar along the top of the screen will have the following options when selected:



Displays The contact details for the NCDR portal and links to Guides.



Takes users to their personal home page, where POTS will be displayed.



Shows the demo page, which has dates of upcoming demos and a link to join demos. There is a short video guide accessible from this page.



Displays the frequently asked questions page, split into 3 sections. Access Queries, Technical Support and Data Interpretation.



Takes users to the Reports page, which lists all reports in alphabetical order. This includes a search facility, allowing search by Name and Category.



Displays Notifications. This will show with a red icon. When selected, the notification can be clicked on for more detail and information.



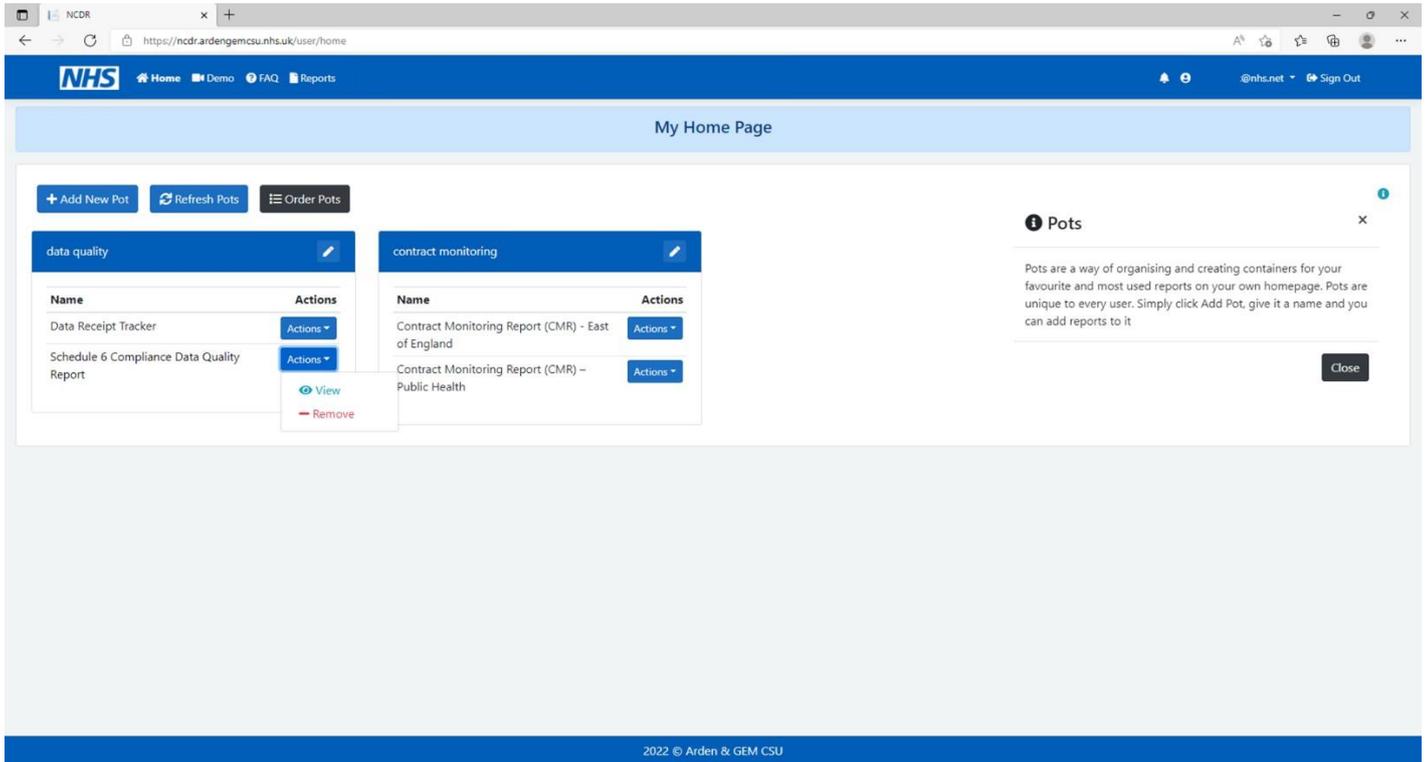
When clicked on allows the selection of "My Profile" or "My Home".



Logs users out of the NCDR portal.

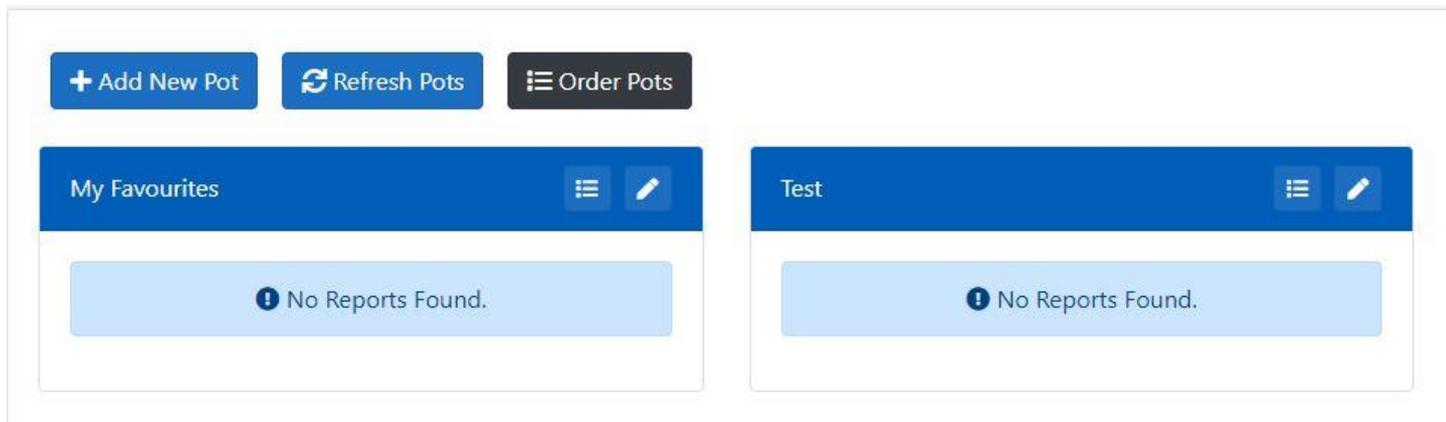
My Home Page

After logging in a user's personal home page is displayed.



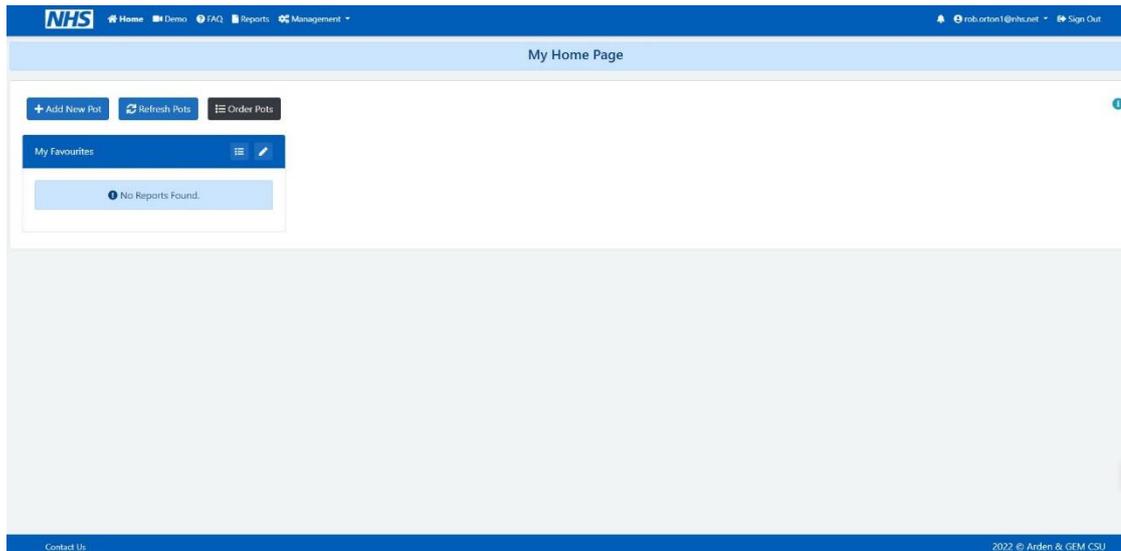
The My Home Page displays user defined/named pots for storing reports in an organised way. A user may use specific reports for BAU, ad-hoc work, projects, and pots can be created to store the reports required for different purposes.

From “My Home Page” New Pots can be added, refreshed, and displayed in a user’s preference by Ordering Pots.

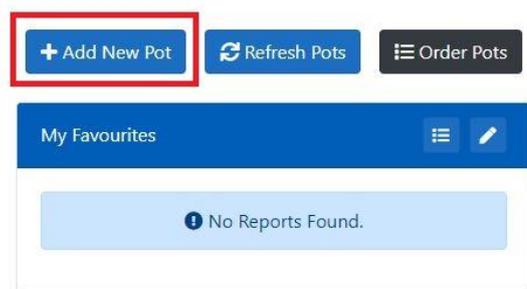


Pots

By default, when a user first uses NCDR the user Home Page will display as below, with only the My Favourites Pot.

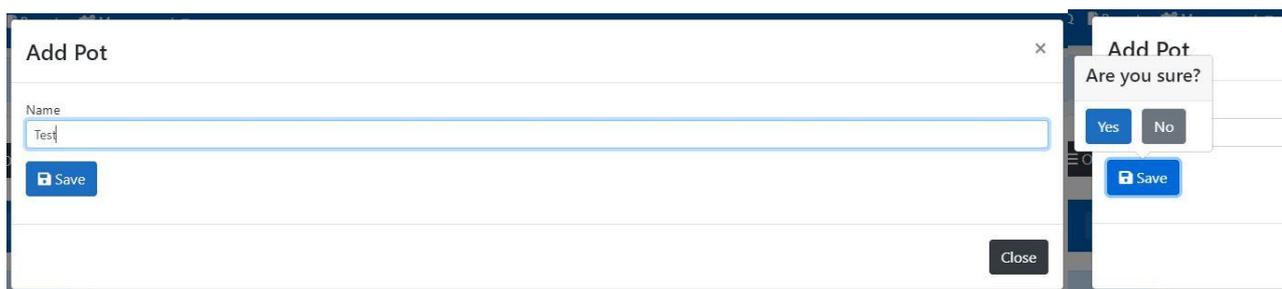


By clicking on the “+Add New Pot” button you can add new Pot for your own use.

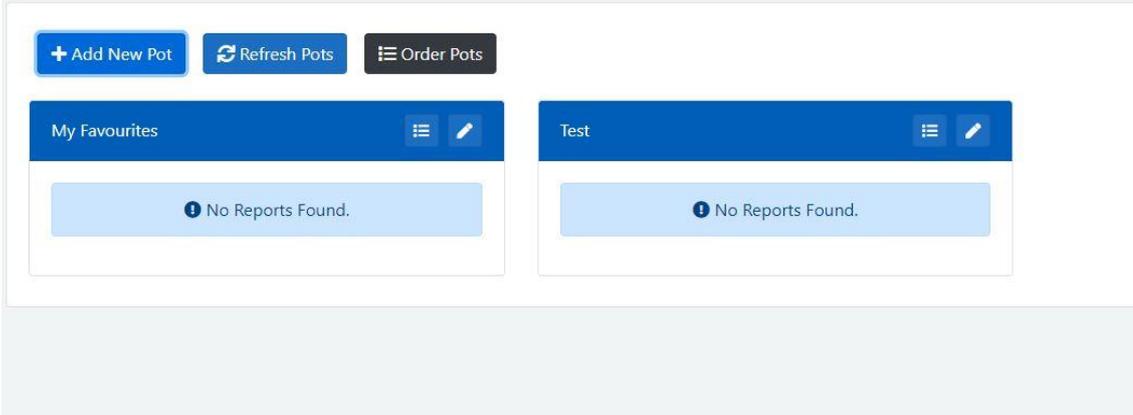


After clicking the Add New Pot button the below box will show, allowing you to name the Pot and then Save.

When clicking Save you will see a confirmation, click Yes to Save this Pot.



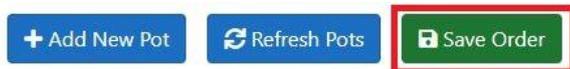
Once added the new Pot can be seen next to the My Favourites Pot.



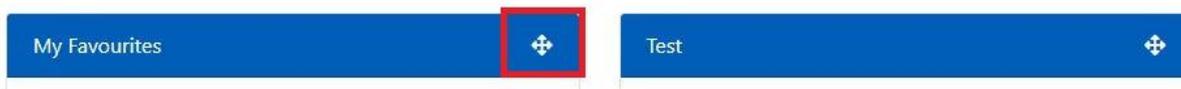
To change the order of pots, click on Order Pots.



The edit icon  in the top right-hand corner of the Pots changes to six small squares which are used to move the Pot by dragging and dropping. When ordering is complete click Save Order.



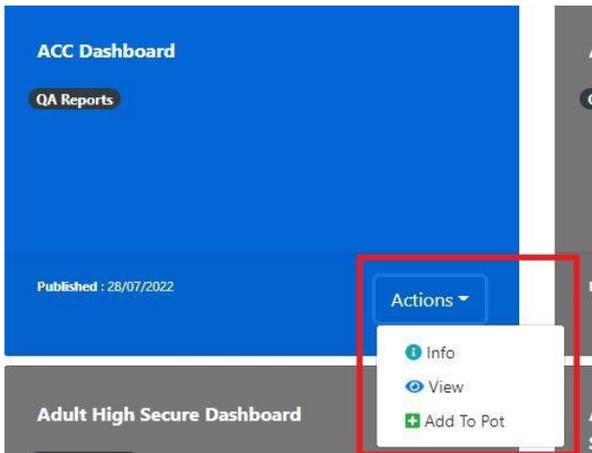
Click and drag the  icon on the pot to reorder them.



Click on the edit option to rename or delete the pot.



Adding reports to a Pot is done from the reports page by selecting Actions from the bottom right corner of the desired report tile. Then select Add To Pot.



When selecting Add to Pot you have the option to choose the desired Pot if you have more than one. Select the green Assign to Pot button for the desired Pot



Click on a report's actions to view it or remove it from the pot.



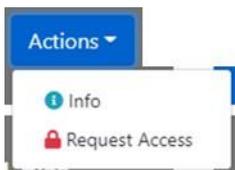
Reports

Reports published to the NCDR Portal are stored under both General groups and Sub-groups.

General permission groups give access to multiple reports, usually of aggregated data. Sub-groups sit under General groups and are used to control permissions for reports that need to have access more locked down.

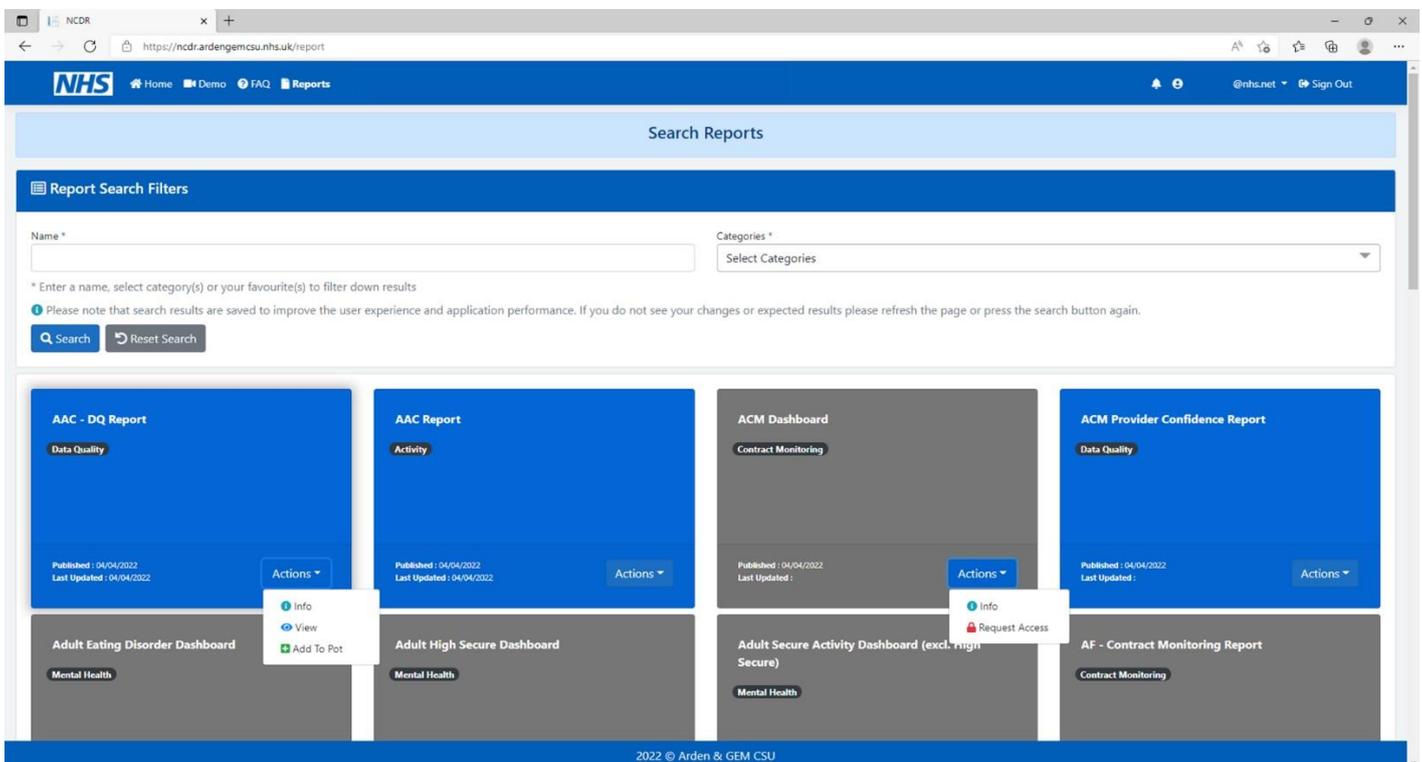
Access to General groups are granted by your specified line manager ([See page 16 for details](#)) or automatically with certain so called “Assign on registration” General groups.

Access to a sub-group is granted by specific, named approvers that are familiar with the reports and the users that should have access. You can only request access to a sub-group if your line manager has already given you access to the parent General group, or the portal has done this automatically (a so called “Assign on registration” General group).



Access To Reports

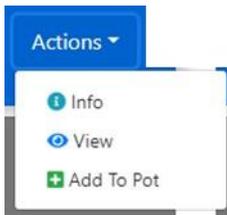
Reports with a blue tile are available to view. You will have to request access to any reports shown in a grey tile, as they are currently unavailable to you.



If reports aren't displayed below the Report Search section on opening this page, click on search and they should then appear.

Reports can be searched for by Name and by Category.

The actions for a report with a blue tile are Info, View and Add to Pot.

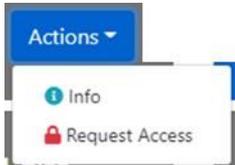


Info – a pop up window with information regarding a report appears.

View – opens the report. Add To Pot is available when viewing a report.

Add To Pot – a pop up window appears with the pots available for the report to be assigned to.

The actions for a report with a grey tile are Info and Request Access.



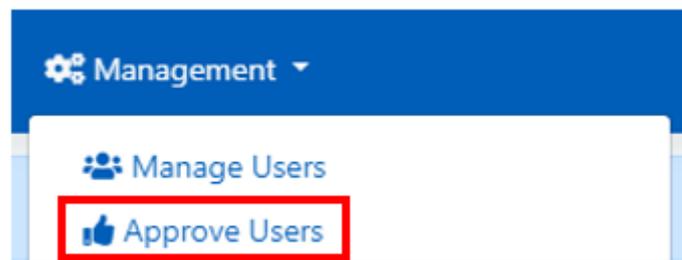
Info – a pop up window with information regarding a report appears.

Request Access – a pop up window appears which allows access to be requested.

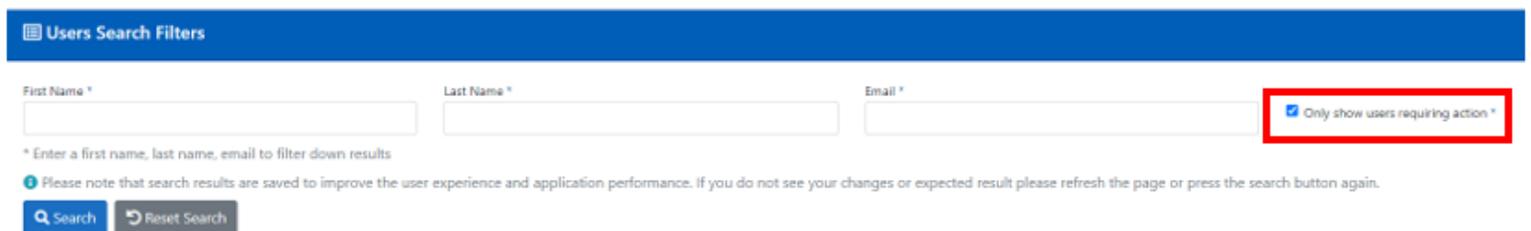
Approving Accounts and General Groups

If you chose the 'Approver' role when registering and a user has chosen you as their approver, then it is your responsibility to approve the users account and report access requests within the NCDR Portal.

To do this, go to the 'Management' tab and select 'Approve Users'.

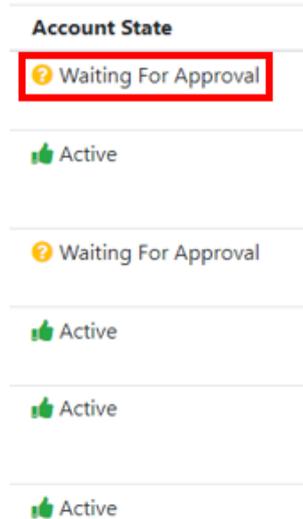


This will display all the pending requests that you need to action. You can also search for specific user's requests using the search function at the top of the screen. Ticking the 'Only show users requiring action' box will only display the pending request.

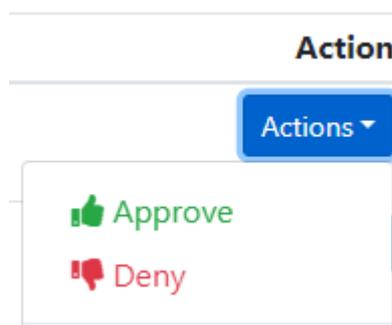


Below are users who have listed you as their line manager

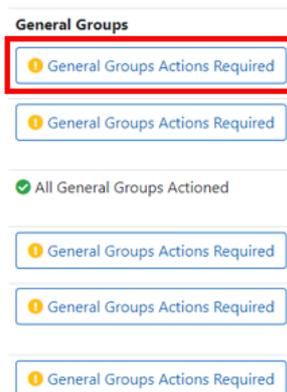
If a user is waiting for their account to be activated, it will be displayed as 'Waiting for Approval' in the 'Account Status' column.



To approve a user’s account access request, navigate to the right side of the request and select the ‘Actions’ button. You can then choose to approve or deny the request.



If a user is waiting for a report general group to be approved, it will be displayed in the ‘General Groups’ Column.



To approve the general group request, select the ‘General Group Access Required’ button, navigate to the pending request, select ‘Actions’ and then chose to either approve or deny the request.

Groups	State	Actions
Adult Critical Care General	Approved 02/03/2023 4:55:02 PM ncdr.system@ncdr	Actions ▾
Report Permissions	Approved 02/03/2023 4:55:02 PM ncdr.system@ncdr	Actions ▾
NHS Elect - SDEC	Approved 02/03/2023 4:55:02 PM ncdr.system@ncdr	Actions ▾
NHS Elect - Frailty	Approved 02/03/2023 4:55:02 PM ncdr.system@ncdr	Actions ▾
Region South East General	Waiting Approval 01/06/2023 1:00:09 PM	Actions ▾
Specialised Commissioning Service Transformation General	Waiting Approval 01/06/2023 1:00:09 PM	<div style="border: 1px solid red; padding: 2px;"> Approve </div> Deny User Details

Using

Reports

Filters and sorting

Global Filters				Page Filter
Activity Year 21/22	Activity Month (All)	Region MIDLANDS	Provider (All)	National POD Code (All)
Provider Name	Activity Plan	Activity Actual	Activity Variance	Price Plan
				Price Actual
				Price Variance

Most reports have filters, and these can be global filters or page filters.

Global filters apply to all pages and the filter selection remains when moving to different pages in a report. In the Region filter shown above MIDLANDS would be carried through to different pages.

Page filters apply to a specific page. If a National POD Code was selected on a particular page, when moving to a different page which also has National POD Code as a filter the default setting for that page would be displayed. Therefore, if required the filter value would need to be re-selected.

A sort icon shows that a field can be sorted in a different order. Sort filters are not always displayed but hovering over a field name shows whether sorting is available.

Toolbar

The following toolbar can be found at the bottom of a report page. Scrolling down the page may be required to see it.



The most useful tools are:

- Undo** Reverses actions made in the report one at a time.
- Redo** Repeats reversed actions made using Undo.
- Revert** Undoes all changes made since the report was opened.
- View: Original** Save filters, sorts, and selections so reports can be opened to preferred settings by selecting them from the list of Views. Default views should not be saved as this makes the view the default for all users.

 Download

Download to other applications. Among the available download options are Image, PDF, PowerPoint, Data, and Crosstab (summary data to Excel).

 Full Screen

This expands the report to fill the screen. Pressing the Esc key exits Full Screen.

Contacts

Contact Us

Website: <https://ncdr.ardengemcsu.nhs.uk/>

E-mail support: ncdr@england.nhs.uk

Telephone: 0333 038 4238

Version	Version Date	Author	Approver Name	Description
1	28/10/2022	Rob Orton		Initial version
2	04/11/2022	Rob Orton	Vicky Nelson	Updated sections
3	19/07/2023	James Lewis	Vicky Nelson	Added section
4	03/07/2024	Jack Waters	Helen Rodgers	Updated sections
5	15/07/2024	Alice Reading		Updated sections
5	22/01/2025	Nkiere Mudianga		Updated contact number
6	23/01/2025	Jack Waters		Updated contact number in footer
7	30/01/2025	Jack Waters		Formatting changes