

**N4**



# **FINANCE REPORTING PROJECT UTILISING POWER TOOLS**

**OXFORD UNIVERSITY HOSPITALS NHS FOUNDATION TRUST**

**SOUTH EAST, ACUTE**



**FOR INFORMATION ON THE  
INNOVATION PROGRAMME  
CLICK HERE**

# THE INNOVATORS

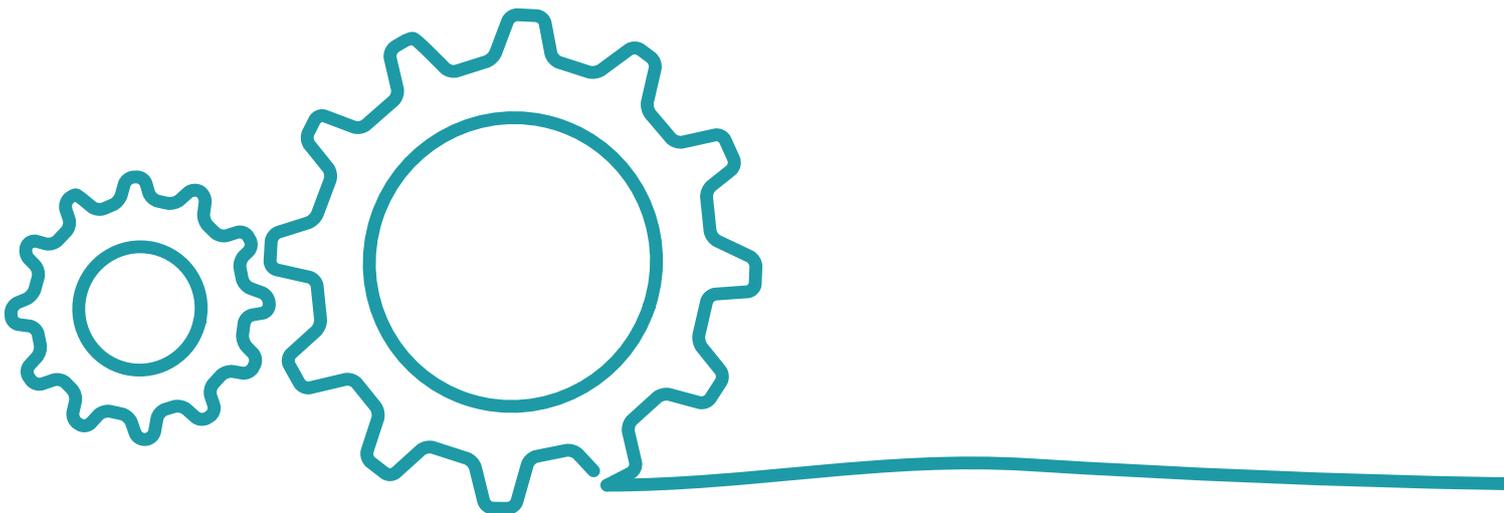
The finance systems and reporting team of three staff who run the finance systems and reporting for the trust.

## THE PROBLEM

The finance systems and reporting team needed to improve the financial reports being provided to budget managers and management accountants otherwise they would not have a clear understanding of the financial position within the trust.

## THE CHALLENGE

How might we improve the financial reports being provided to budget managers and management accountants to give them a clearer understanding of the financial position within the trust?



# THE INNOVATION

The trust invested in Office 365 which brought with it a number of new modules/ Power tools including Power Automate and Power BI. We undertook a project to improve the reporting of financial information using Power tools. Our finance systems are hosted by North East Partnerships and we use Oracle Fusion.

In order to access data, we initially used scripts developed by King's College Hospital NHS Foundation Trust. Working with King's we modified their reports to enable data to be downloaded to meet our requirements.

To develop a live system, we used Power Automate to automate the process every half hour. This required development of skills in Power Automate. With our digital team and an external consultant, we developed a finance database to hold the data to feed into Power BI. Team members have used various internet training resources to train and pick up skills around Power Automate, Power BI & Dax and have worked alongside our external consultant.

We initially developed Power BI reports for budget managers which allowed them to drill down to understand what maternity and overtime costs were by cost centre for each individual. On the non-pay side we have been able to give access and highlight key suppliers and subjective spend by invoice and also by accruals.

The system went live in July 2022 and we now publish all month-end reports via Power BI giving budget managers access across the trust. Utilising row level security we are able to control access, including access to pay data to those who need it compared to non-pay information. Having developed the budget manager reports we have also developed reports for management accountants to see key data to assist in their month-end processes and interrogation of the ledger. Work is currently being done to provide reports built for procurement to help understand requisitions raised, purchase orders fulfilled and invoices that are paid or still outstanding.

As Power BI is picked up by different teams new ideas are coming through from costing and income teams. Our biggest constraint is the resource available to develop the reports. Recently we developed a full suite of statistical process control (SPC) charts which are automatically updated and save two days a month in the time for collation.

We are currently also working with HR to explain the benefits in using Power BI for their reporting. We have shared our learning with a couple of other trusts.

# THE LESSONS LEARNT

If we had the ability to put a number of the finance team on Power BI development courses that would have been beneficial. It would have speeded up the development and expansion of reporting.

The reports have given us a greater insight into the finances of the trust and we are still learning how we can use the tool to achieve greater insights. The productivity benefit is still being realised and the compilation of SPC charts has been the greatest win to date (saving 24 days over a twelve-month period).

## THE OUTPUTS

The outputs are:

- professional looking reports which present data both graphically and in table format
- the ability to drill through from a high level to the detail
- ability to undertake quick analytics
- increased speed in providing answers to financial questions and giving better insights
- productivity gains in producing information (as per SPC production).

## THE OUTCOMES

The outcomes are:

- enthusiasm within the team related to development of the tool
- positive feedback from finance colleagues for the information/ reports produced.
- engagement from business/ budget managers into the finance details of their area improvement in reports produced for users.

## THE QUICK WINS

- Cost up the software for trust-wide implementation (under £50k).
- Use Udemy/ You Tube and Microsoft to gain traction and get engagement from colleagues and wider audiences
- Show users what can be achieved to get them engaged.

# THE REVIEWERS SAID

**“IT REDUCES REPORTING TIMETABLE AND SO SHOULD ENABLE THE FINANCE TEAM TO BE MORE PRODUCTIVE AND ENHANCE THEIR HEALTH AND WELL-BEING.”**

**“REDUCES THE AMOUNT OF TIME PROCESSING AND MORE TIME ANALYSING THE DATA, STANDARDISING IT FOR THEIR USERS, WHILE CONTINUALLY LOOKING TO BUILD AND ENHANCE THE FUNCTIONALITY OF THE SOFTWARE.”**

**“GOOD USE OF TECHNOLOGY AVAILABLE AND SHARING OF DEVELOPMENTS.”**



# WHAT YOU CAN DO NOW

## SUBMIT INNOVATION

**If you recognise the problem stated and have implemented your own innovation** to overcome it please submit this innovation to the programme and give others more examples to learn from.

## REGISTER INTEREST

**If you recognise the problem stated and would like to know more details about this innovation in particular**, we will be hosting showcase and workshop sessions throughout the year, so all interested staff can gain ideas and inspiration from innovators in a manageable one-to-many format.

## SUBMIT PROBLEM

**If you have a problem but don't currently know of a solution to it**, then please submit it here and in 2022 the Forum intends to crowdsource solutions to problems that don't currently have known innovations.

## LEARN MORE

**If you would like to learn more about about the innovation programme** please click for more details.

## ENDORSEMENT DISCLAIMER

The Finance Innovation Forum's Innovation Programme asks NHS Finance peer reviewers whether the "Innovation overcomes, successfully addresses, or solves the problem identified". The programme does not endorse, recommend or provide any assurance of software used or mentioned in any of the published innovations. If you think a published innovation is being used to falsely validate a commercial product or company please contact [finance.innovation@nhs.net](mailto:finance.innovation@nhs.net)



## WHAT ARE WE DOING

- A national Innovation Programme for NHS Finance staff to submit their innovations for peer review. Successful innovations will be published and accessible to all on the One NHS Finance website
- Software Skills is a network of likeminded NHS Finance staff which exists to help its members see what's possible when using accessible software to its full potential.
- An 'Art of the Possible' briefing which explains two new technologies AI & Blockchain and discusses the opportunity for NHS Finance
- We helped develop a Provider Finance Return (PFR) Automation Project tool, to save NHS Finance teams excessive manual time in their monthly returns.

## WHAT YOU CAN DO NOW

- Submit your innovations for peer review
- Sign up to be an innovation peer reviewer
- Share you problems and ideas with us
- Join the Software Skills network
- Register your interest in R&D and automation

**Innovation  
Programme**

**Software  
Skills**

**Automation  
sign up**

**Be a peer  
reviewer**

**Art of the  
Possible**



## FURTHER INFORMATION

Website: [FinanceInnovation.nhs.uk](https://FinanceInnovation.nhs.uk)

Email: [FinanceInnovation@nhs.uk](mailto:FinanceInnovation@nhs.uk)

LinkedIn: [One NHS Finance](#)

Twitter: [@OneNHSFinance](#)



One NHS Finance brings together the Future-Focused Finance, National Finance Academy, and the Finance Innovation Forum programmes and networks to make sure that everyone working in NHS Finance has access to skills, knowledge, methods, and opportunities to influence and enhance patient services.



An NHS Finance platform for the discovery and development of problems, ideas and innovations.