BCN

EasySPC User Guide

V1.2

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Version: 1.2

This document aims to guide you through the process of getting started with EasySPC.

Overview

EasySPC provides users with the ability to create SPC charts within Power BI.

A key feature is the ability to create multiple SPC charts in a single visualisation via the Spotlight functionality. The at-a-glance overview enables you to quickly identify issues that may require urgent attention, without having to filter through each chart individually.

Pre-requisites

EasySPC licence

Basic SPC charting functionality is free to use without a Pro license.

Advanced features such as annotations, marking of baselines, shifting control limits and ghosting of data points requires purchasing a Pro license.

Spotlight, which provides a single overview of performance across multiple indicators is a Pro feature, so a licence is also required to enable it.

Starter	Pro
All chart types available	Spotlight functionality
Applying Targets	Annotations
Toggle Sigma 1 and 2 on/off	Marking Baselines
Export to .ppt/.pdf	Shifting Control Limits
Special Cause identification	Ghosting data points
	Upper/Lower Specification Limits
	Capability Analysis (inc. CPK, PPK, DpM)
	JSON Theme Generator

Please contact BCN for more information by visiting https://bcn.co.uk/data-and-ai/easyspc/

Setting up EasySPC

After adding and selecting the EasySPC visual, following landing page will display:

The Chart buttons provide an overview of each individual chart type to help you select. If you need further guidance for choosing a chart, click Use Chart Selection Wizard. This will walk you through the available chart types by selecting the way the data is presented.

All chart types are available without a license. Selecting one of them will automatically display the chosen chart type. Please refer to the table below when determining which fields are required:

Chart Type	Field			
	Date/DateTime	Measure Data	Measure Data (n)	Measure Data (Stdev)
Run Chart	Continuous Date or DateTime field	Value to be measured (*Numerator*)	Not required	Not required
C Chart			Not required	Not required
U Chart			Group/Sample Size (*Denominator*)	Not required
P Chart			Group/Sample Size (*Denominator*)	Not required
X-MR Chart			Not required	Not required
XbarS Chart			Group/Sample Size (*Denominator*)	Std Dev calculated for Group/Sample
T Chart			Not required	Not required
G Chart			Not required	Not required

Once you select a chart from the home screen, a *Get started* screen will help you add any missing data.
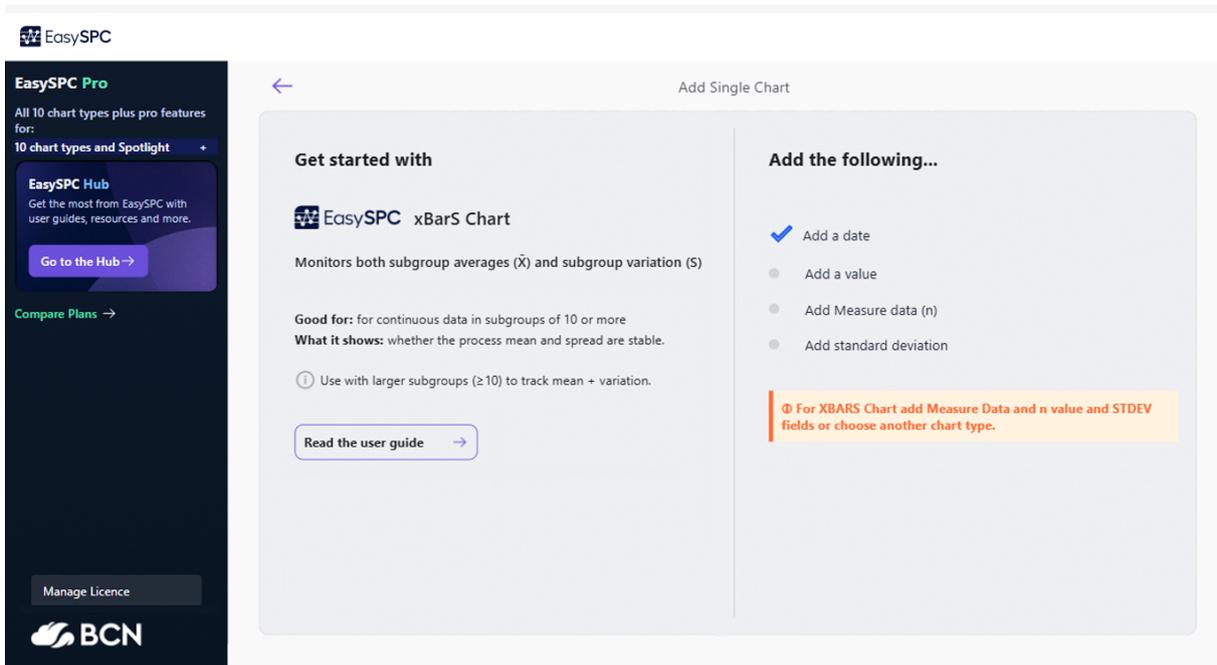
Data Point settings

Click on a data point to use the EasySPC data point settings. You will need a Pro licence to access these.

- **Ghost point** — remove this point from the calculations
- **Add / Clear Annotations** — Annotate your data points to help track your activity. The annotations appear as small comments on the chart (hover over for the full annotation). You can adjust the position for clarity.
- **Mark / Mark default Baseline** — mark a baseline from your chosen data point
- **Shifts** — once you have marked a baseline, you can make a shift. There are a number of options: Start Shift, Shift 8 points and Shift to end.
- **Cross Filter** – Removes data that doesn't apply to the selection
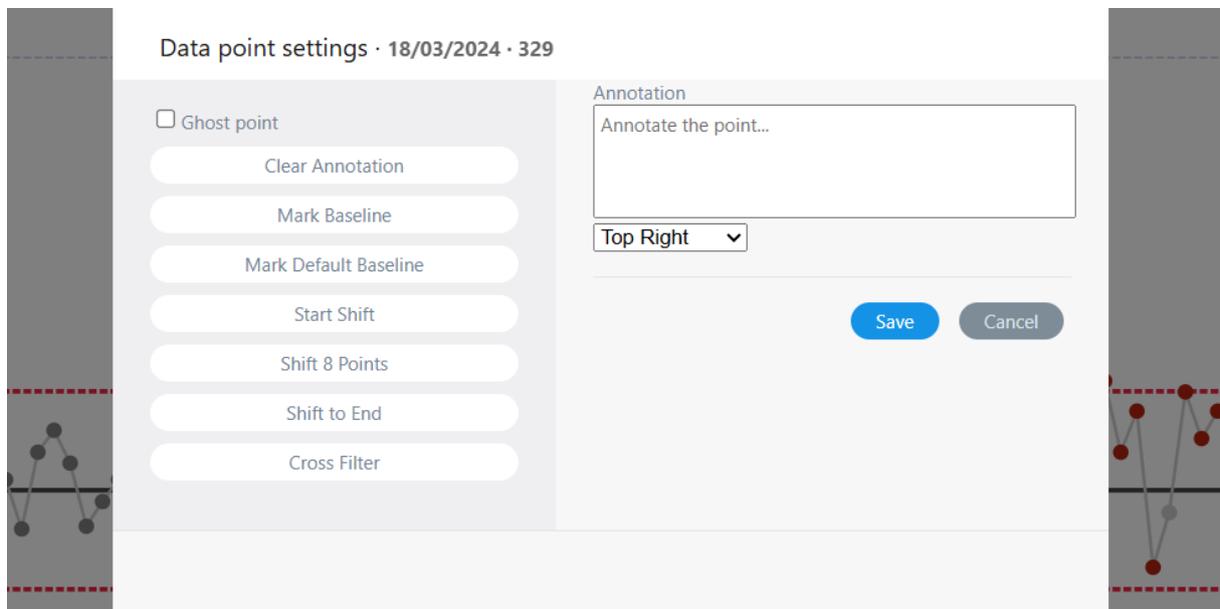
Quick Chart settings

Commonly used chart settings are also available by clicking the gear icons at the top right. These include:

- **Chart type** — quickly switch the chart type
- **Desired direction of travel** — 'Up is good' etc
- **Target settings** — Show/hide
- **Axis settings** — X and Y Axis titles
- **Chart actions** — clear all data point settings (Annotations, baselines etc)
- **Enable Autoshift** — a feature requested by many customers
- **Enable MDC icons** — Endorsed by the NHS Making Data Count Team
- **Download data** — Export from EasySPC
- **Baseline** — set the number of data points

Entering Licence Key

There are three ways to add a Licence Key to the EasySPC visual.

JSON Theme Generator

If **many SPC charts are needed**, it is recommended to use the JSON Theme Generator (available on the BCN EasySPC Hub) to apply the Licence to all generated EasySPC visuals.

Custom Measures

Our **recommended method** is to **create your own measures** for Power BI Desktop with DAX in the visual formatting pane, under Chart Settings.

Set up two measures, one for **Licencee** and one for **Licence Key**, both with the required value within quotation marks, e.g. [Licence Key = "XX1234"]. These measures can then be added to the Conditional Formatting [*fx*] elements within the Format pane of the visual. This stores the Licence details within the PBIX but requires adding them to each EasySPC visual. Learn more with our detailed guide.

Manage Licence Screen

Alternatively, the Licence can be entered inside EasySPC by selecting **Manage Licence** from the landing page. The following page will display:

After entering, please select the SAVE button before closing the landing page.
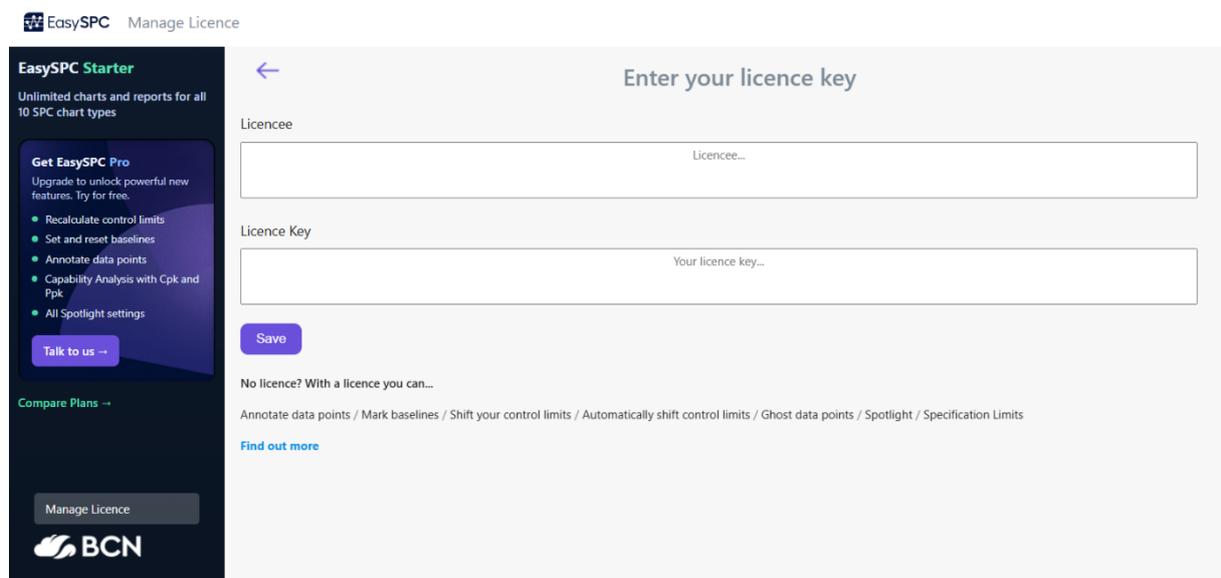
Setting up your data for Spotlight

For Spotlight the **Date**, **Measure Data**, **Measure Data (n)** and **Measure Data (Stdev)** fields need to be added to the visual.

Data must be presented within a single 'long' KPI table. For example, you may currently monitor multiple fact tables with a shared dimension within a star schema. Any existing tables should be recreated as the following example shows:
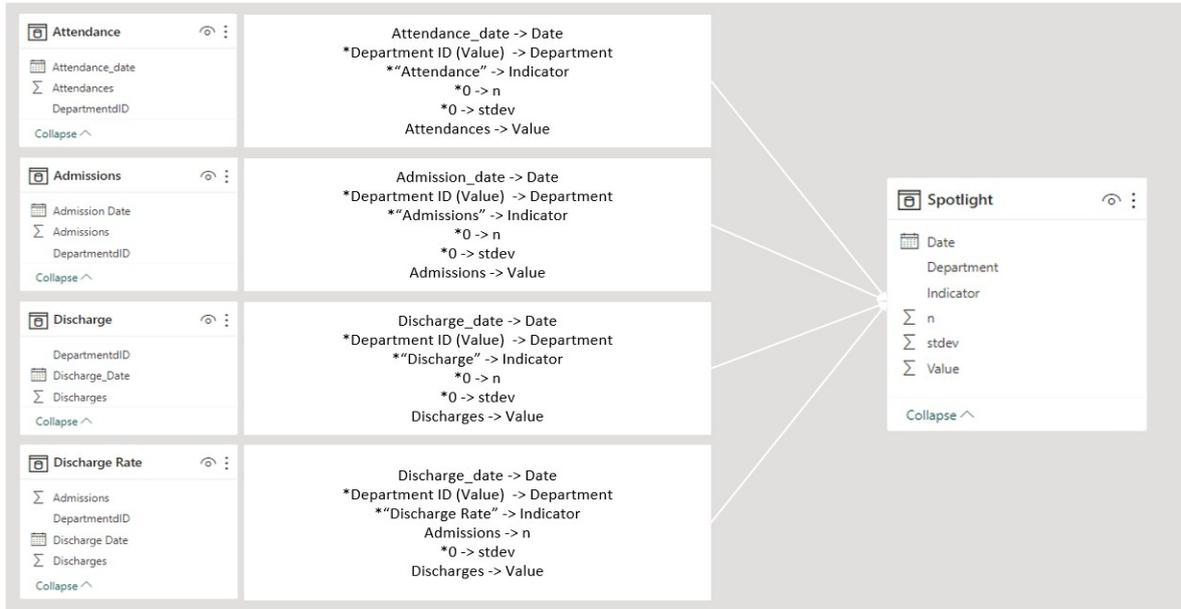
  (*) some additional data will need to be created as it does not exist in the source data – in which case a placeholder value is required for the visual to render correctly.

Example Data structure:

Indicator	Attendance_date	Value	n	stdev	Department
Attendance	01/01/2023	2645	0	0	Cardiology
Admissions	01/01/2023	2633	0	0	Cardiology
Discharges	01/01/2023	2614	0	0	Cardiology
Discharge Rate	01/01/2023	2622	2633	0	Cardiology
Attendance	01/01/2023	1901	0	0	ENT
Admissions	01/01/2023	1843	0	0	ENT
Discharges	01/01/2023	1816	0	0	ENT

Create the Spotlight visual

Once your data is set up, you can create the EasySPC Spotlight visual.

Get started with Spotlight

The *Get started with Spotlight* screen can guide you through the required data fields, along with setting your initial chart type.
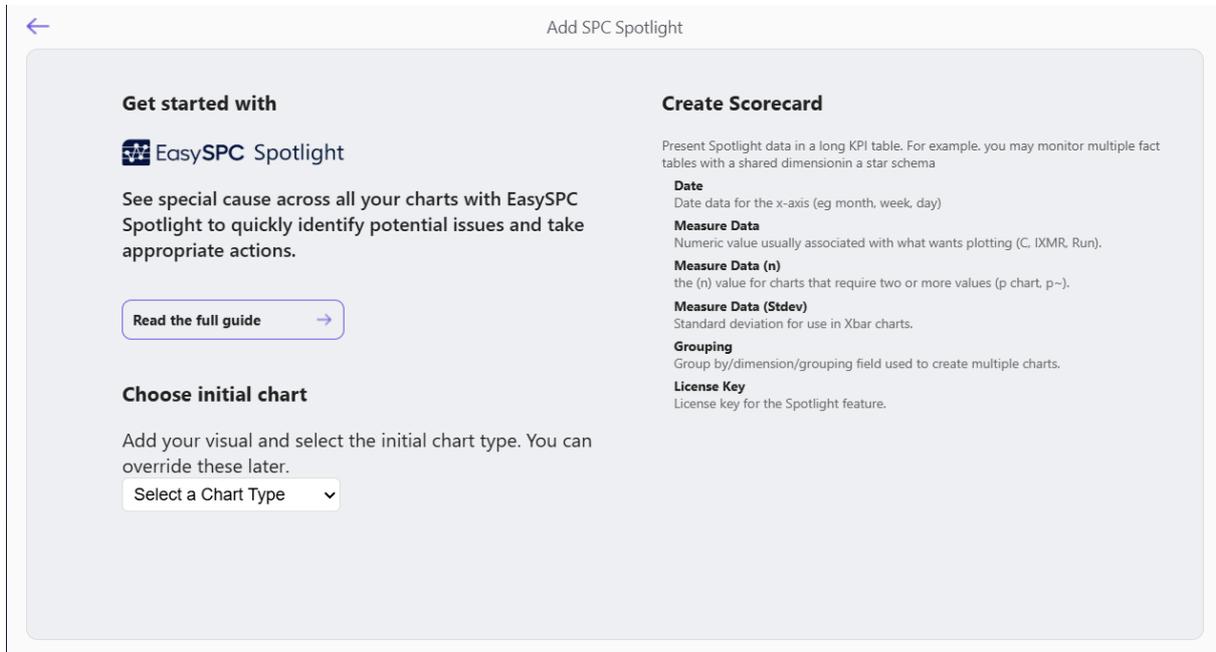
Spotlight data settings in the Power BI formatting pane

1	**Add licence key** You need a valid licence key to use Spotlight. Add this first.	
3	**Select initial chart type** Once Spotlight mode is enabled you can also select the initial chart type from the formatting pane. You can update the chart type for individual groups later once the visual has been created.	

5	**Add data fields** Add a minimum of Date, Measure Data, Measure data (n) and Measure data (Stdev) fields. Continue to add additional data fields to the visual.	Date Date ⌄ ✕ Measure Data Sum of Value ⌄ ✕ Measure Data (n) Sum of n ⌄ ✕ Measure Data (Stdev) Sum of stdev ⌄ ✕ Group By Indicator ⌄ ✕ Department ⌄ ✕

Configure the visual

Once Spotlight is enabled and you have created the charts, you can apply various filters to the overview page, as well as navigating around the individual charts.

Setting the chart type (and other settings) for different groups

You can update the chart type and other settings for individual groups once the visual has been created.

Simply click on the **Back to Spotlight** button in the top right corner of the overview page to display the Spotlight settings.

From here you can select the group type that you want to set different chart type/formatting for:

Only one group type can be used across all chart types.

In example above, if 'KPI' is selected, then all Spotlight SPC charts can have their chart type customised based on that metric/field. If 'Grouping' is required also, then a separate Spotlight visual would need to be created.

Select the individual metric/field value you would like to customise the SPC chart for:
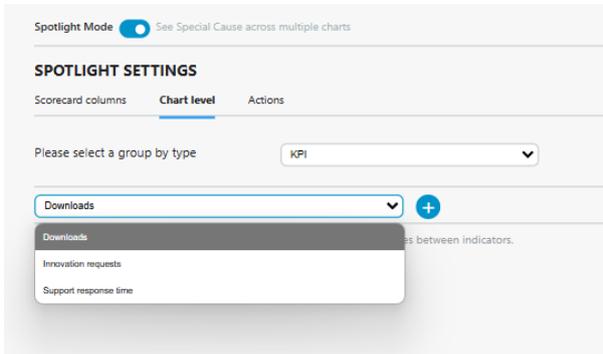
Once selected, various settings can be modified. Within 'Chart Settings' is the option to specify the SPC chart type for the chose metric/field value. After configuring the desired settings select 'Save Changes' and return to the visual to check all settings have been applied appropriately.
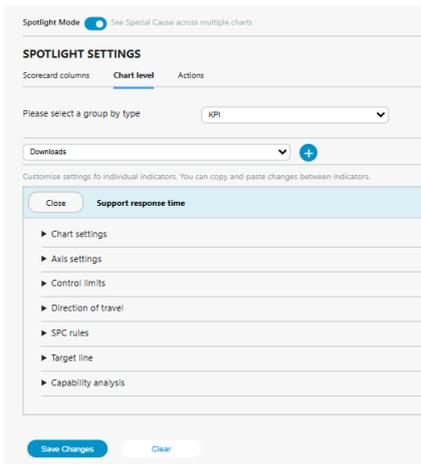
Select the chart type required for each group and click **Save Changes** to be returned to the overview page.

View individual charts

You can drill down to the individual chart allowing further detail analysis.

You can also edit each chart individually, such as marking a baseline, adding a shift and annotations. Annotations added at the individual chart level will display on the Spotlight overview page.

Note: New charts created with Spotlight are not linked to any existing visuals you have created with EasySPC. For example, if you set a baseline or add an annotation to an individual chart within the Spotlight visual, the baseline or annotation would not be available within another visual.

If you need to move existing charts to Spotlight, we advise you use the export facility to get the data and input it once Spotlight has been set up. The same applies to baselines and targets from existing EasySPC charts.

Edit individual chart settings

Open the chart you would like to edit by clicking on the arrow icon from the Spotlight table →

Click on the quick chart settings icon in the top right corner ⚙

From here you can edit the setting for this individual chart, such as the chart type, desired direction of travel and Axis format.

Once you have updated the required settings for the individual chart, click save to apply the changes and return to the chart.

Working with Targets

Spotlight allows you to set targets at an individual chart level or for all charts contained within the Spotlight visual.

Targets can be managed at the individual chart level within the quick chart settings menu, as above.

To enable targets at the Spotlight level, switch the toggle **Target Line Settings** on. Within target source select your *measure*.
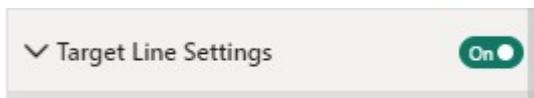
Adding additional data items

You can add additional target data item to the visual.

Select **Measure** to add additional data items, which will plot a target line as per the data.

For example, you could create a measure to set a universal target line.

Alternatively, different departments could have specific targets applied to them.

Example Target data:

Indicator	Date	Value	n	stdev	Department	Target
Attendance	01/04/2022	1391	0	0	Cardiology	1100
Attendance	01/05/2022	2792	0	0	Cardiology	1100
Attendance	01/06/2022	1145	0	0	Cardiology	1100

Sample Data for Spotlight

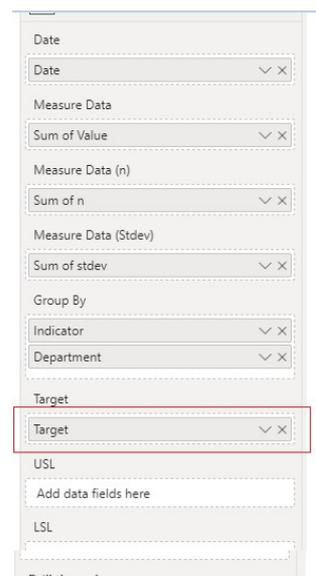| Indicator	Date	Value	n	stdev	Department
Attendance	01/04/2022	1391	0	0	Cardiology
Attendance	01/05/2022	2792	0	0	Cardiology
Attendance	01/06/2022	1145	0	0	Cardiology
Attendance	01/07/2022	1331	0	0	Cardiology
Attendance	01/08/2022	2107	0	0	Cardiology
Attendance	01/09/2022	1481	0	0	Cardiology
Attendance	01/10/2022	1365	0	0	Cardiology
Attendance	01/11/2022	2802	0	0	Cardiology
Attendance	01/12/2022	1945	0	0	Cardiology
Attendance	01/01/2023	2645	0	0	Cardiology
Attendance	01/02/2023	1626	0	0	Cardiology
Attendance	01/03/2023	2265	0	0	Cardiology
Attendance	01/04/2023	1303	0	0	Cardiology
Attendance	01/05/2023	2168	0	0	Cardiology
Attendance	01/06/2023	2967	0	0	Cardiology
Attendance	01/07/2023	2043	0	0	Cardiology
Attendance	01/04/2022	2987	0	0	ENT
Attendance	01/05/2022	2464	0	0	ENT
Attendance	01/06/2022	1815	0	0	ENT
Attendance	01/07/2022	2855	0	0	ENT
Attendance	01/08/2022	1889	0	0	ENT
Attendance	01/09/2022	1124	0	0	ENT
Attendance	01/10/2022	2844	0	0	ENT
Attendance	01/11/2022	1683	0	0	ENT
Attendance	01/12/2022	1262	0	0	ENT
Attendance	01/01/2023	1901	0	0	ENT
Attendance	01/02/2023	2732	0	0	ENT
Attendance	01/03/2023	2630	0	0	ENT
Attendance	01/04/2023	2990	0	0	ENT
Attendance	01/05/2023	1052	0	0	ENT
Attendance	01/06/2023	1559	0	0	ENT
Attendance	01/07/2023	1435	0	0	ENT
Admissions	01/04/2022	1269	0	0	Cardiology
Admissions	01/05/2022	2514	0	0	Cardiology
Admissions	01/06/2022	1087	0	0	Cardiology
Admissions	01/07/2022	1310	0	0	Cardiology
Admissions	01/08/2022	2103	0	0	Cardiology
Admissions	01/09/2022	1409	0	0	Cardiology
Admissions	01/10/2022	1351	0	0	Cardiology
Admissions	01/11/2022	2584	0	0	Cardiology
Admissions	01/12/2022	1844	0	0	Cardiology
Admissions	01/01/2023	2633	0	0	Cardiology
Admissions	01/02/2023	1616	0	0	Cardiology
Admissions	01/03/2023	2239	0	0	Cardiology
Admissions	01/04/2023	1301	0	0	Cardiology
Admissions	01/05/2023	2010	0	0	Cardiology
Admissions	01/06/2023	2786	0	0	Cardiology
Admissions	01/07/2023	1905	0	0	Cardiology
Admissions	01/04/2022	2966	0	0	ENT
Admissions	01/05/2022	2329	0	0	ENT
Admissions	01/06/2022	1707	0	0	ENT
Admissions	01/07/2022	2725	0	0	ENT
Admissions	01/08/2022	1765	0	0	ENT
Admissions	01/09/2022	1074	0	0	ENT
Admissions	01/10/2022	2809	0	0	ENT
Admissions	01/11/2022	1621	0	0	ENT
Admissions	01/12/2022	1209	0	0	ENT

Admissions	01/01/2023	1843	0	0	ENT
Admissions	01/02/2023	2654	0	0	ENT
Admissions	01/03/2023	2564	0	0	ENT
Admissions	01/04/2023	2717	0	0	ENT
Admissions	01/05/2023	1042	0	0	ENT
Admissions	01/06/2023	1488	0	0	ENT
Admissions	01/07/2023	1326	0	0	ENT
Discharges	01/04/2022	1256	0	0	Cardiology
Discharges	01/05/2022	2487	0	0	Cardiology
Discharges	01/06/2022	1084	0	0	Cardiology
Discharges	01/07/2022	1307	0	0	Cardiology
Discharges	01/08/2022	2086	0	0	Cardiology
Discharges	01/09/2022	1392	0	0	Cardiology
Discharges	01/10/2022	1336	0	0	Cardiology
Discharges	01/11/2022	2537	0	0	Cardiology
Discharges	01/12/2022	1843	0	0	Cardiology
Discharges	01/01/2023	2614	0	0	Cardiology
Discharges	01/02/2023	1613	0	0	Cardiology
Discharges	01/03/2023	2199	0	0	Cardiology
Discharges	01/04/2023	1275	0	0	Cardiology
Discharges	01/05/2023	1978	0	0	Cardiology
Discharges	01/06/2023	2749	0	0	Cardiology
Discharges	01/07/2023	1896	0	0	Cardiology
Discharges	01/04/2022	2937	0	0	ENT
Discharges	01/05/2022	2321	0	0	ENT
Discharges	01/06/2022	1701	0	0	ENT
Discharges	01/07/2022	2721	0	0	ENT
Discharges	01/08/2022	1740	0	0	ENT
Discharges	01/09/2022	1065	0	0	ENT
Discharges	01/10/2022	2766	0	0	ENT
Discharges	01/11/2022	1599	0	0	ENT
Discharges	01/12/2022	1208	0	0	ENT
Discharges	01/01/2023	1816	0	0	ENT
Discharges	01/02/2023	2608	0	0	ENT
Discharges	01/03/2023	2546	0	0	ENT
Discharges	01/04/2023	2695	0	0	ENT
Discharges	01/05/2023	1033	0	0	ENT
Discharges	01/06/2023	1475	0	0	ENT
Discharges	01/07/2023	1316	0	0	ENT
Discharge Rate	01/04/2022	1268	1269	0	Cardiology
Discharge Rate	01/05/2022	2471	2514	0	Cardiology
Discharge Rate	01/06/2022	1085	1087	0	Cardiology
Discharge Rate	01/07/2022	1289	1310	0	Cardiology
Discharge Rate	01/08/2022	2076	2103	0	Cardiology
Discharge Rate	01/09/2022	1402	1409	0	Cardiology
Discharge Rate	01/10/2022	1335	1351	0	Cardiology
Discharge Rate	01/11/2022	2563	2584	0	Cardiology
Discharge Rate	01/12/2022	1828	1844	0	Cardiology
Discharge Rate	01/01/2023	2622	2633	0	Cardiology
Discharge Rate	01/02/2023	1602	1616	0	Cardiology
Discharge Rate	01/03/2023	2225	2239	0	Cardiology
Discharge Rate	01/04/2023	1290	1301	0	Cardiology
Discharge Rate	01/05/2023	1992	2010	0	Cardiology
Discharge Rate	01/06/2023	2740	2786	0	Cardiology
Discharge Rate	01/07/2023	1871	1905	0	Cardiology
Discharge Rate	01/04/2022	2914	2966	0	ENT
Discharge Rate	01/05/2022	2302	2329	0	ENT
Discharge Rate	01/06/2022	1705	1707	0	ENT
Discharge Rate	01/07/2022	2683	2725	0	ENT
Discharge Rate	01/08/2022	1761	1765	0	ENT
Discharge Rate	01/09/2022	1053	1074	0	ENT
Discharge Rate	01/10/2022	2790	2809	0	ENT
Discharge Rate	01/11/2022	1604	1621	0	ENT
Discharge Rate	01/12/2022	1206	1209	0	ENT
Discharge Rate	01/01/2023	1820	1843	0	ENT
Discharge Rate	01/02/2023	2606	2654	0	ENT
Discharge Rate	01/03/2023	2514	2564	0	ENT
Discharge Rate	01/04/2023	2704	2717	0	ENT
Discharge Rate	01/05/2023	1023	1042	0	ENT
Discharge Rate	01/06/2023	1472	1488	0	ENT
Discharge Rate	01/07/2023	1304	1326	0	ENT

Support for EasySPC

If you have any other questions, please contact our support team via the [EasySPC Hub](#).