Professional Workforce Check-in Survey Standard Operating Procedure (SOP)

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# Description

This guide explains how to generate the i) Monthly (Professional\_Workforce.html) and ii) Six monthly (checkin\_6Month.html) **Professional Workforce Check-in Survey reports**.

It covers setting up the initial repository, preparing data, and running the **two** automated reports in RStudio with Quarto.

***⚠️ Note: This SOP will NOT cover the process of updating the data.csv file, which you will need to do manually by pulling in information from the People Analytics Check-in dashboard each month.***

***This is accessible through:*** [**UKHSA People check-in Report - Power BI**](https://app.powerbi.com/groups/me/apps/0abff0ac-078d-4074-805a-da3646840067/reports/ebb11658-cdfb-4cff-b0e5-a065d5b9dd7b/df56ba7f79326af763d3?ctid=ee4e1499-4a35-4b2e-ad47-5f3cf9de8666&experience=power-bi)

# Before You Start

1. Request installation of the following from the Service Now portal:

* **R**
* **RStudio**
* **Git (x64)**

1. Download the repository from GitHub:
   1. Open **RStudio**. (**image 2.1 and 2.2**)
   2. Go to **File → New Project → Version Control**. (**image 2.3**)
   3. Select **Git**.
   4. Enter the following: (**image 2.4**)
      1. **Repository URL:** <https://github.com/OhinUKHSA/Check_in_Reports.git>
      2. **Project directory name:** ProfWorkForce (or a name of your choice)
      3. **Location:** Choose where you want the project stored
      4. **Option:** Tick “Open in new directory”
   5. Click **Create Project**.

***✅ This will create a local copy of the repository with all necessary scripts (excluding data files, which must be downloaded separately for information governance reasons).***

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| * 1. Open R studio | * 1. Example of Rstudio |
|  |  |
| * 1. After opening RStudio click **file**, **new project** and then select **Version Control** | * 1. Fill in window as shown |

# Repository Structure

You should now have a repository similar to what is shown below

***⚠️ Note you will not have any .csv files (You will need to request this from me) or .html files, this will be created when you start running the analysis on your computer***

A screenshot of a computer

AI-generated content may be incorrect.

# Install Packages (first time only)

1. In RStudio, open the script **Load\_packages.R** (File → Open File → Load\_packages.R).
   * You should now see a screen similar to that shown in **image 4.1.**
2. Select all code (**Ctrl + A**) and run (**Ctrl + Enter**) (see **image 4.2**)
   * This can take **A WHILE** to complete
   * When complete, you will see the message:  
     ‘*All required packages are installed. You can run report*.’ (see **image 4.2)**

**✅ *Once you have done this step you will not need to do it again***

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| 4.1. Typical screen after opening Load\_package.R file. Highlighted in red is a new window top left including Load\_package.R script (yellow tab). |
|  |
| 4.2. Screenshot showing when all packages are installed. Highlighted in yellow indicates this is complete (**note this process can take a while to download**) |

# Prepare the Data

1. Navigate to your project’s **data** folder:

***…/ ProfWorkforceCheckIn /data/***

1. Create a copy of the **data.csv** file and save it to ***workforce Project/data/*old\_data**/ folder (see **image 5.1**)
   * ***⚠️ Note: If this is the first time running youwill not have any .csv files (You will need to request this from me)***
   * **Recommended** to create separate folder within this as shown in **image 5.2**
2. Navigate back to ***…/ProfWorkforceCheckIn/data/*** and open **data.csv** file
3. Update this file using data from the latest **People Analytics check-in survey results (**[**UKHSA People check-in Report - Power BI**](https://app.powerbi.com/groups/me/apps/0abff0ac-078d-4074-805a-da3646840067/reports/ebb11658-cdfb-4cff-b0e5-a065d5b9dd7b/df56ba7f79326af763d3?ctid=ee4e1499-4a35-4b2e-ad47-5f3cf9de8666&experience=power-bi)**)**
   * Updating data file is not covered in this SOP

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| * 1. Move or copy the previous month’s **.csv** files into ***workforce Project/data/*old\_data**/ before updating |
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| * 1. **Recommended** to save data in separate folder for version control |

# Create Monthly Report

1. Open R project (**Rproject\_checkin.Rproj**) from your directory (**image 6.1** - highlighted in red)

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| * 1. Image highlighting **Rproject\_checkin**.**Rproj** project (highlighted in red) and **Professional\_Workforce.qmd** script (**highlighted in blue**) which will need to be run within the R project to create new report |

1. When the R project opens, if you **don’t** see **Professional\_Workforce** in top left pane (see **image 6.2** -highlighted in yellow), click:
   * File 🡪 Open File 🡪 Professional\_Workforce.qmd. (**image 6.1 -** highlighted in blue)
     + *You should now see this script open in top left pane*. (**image 6.2 –** highlighted with red circle)

⚠️ **NOTE:** *Make sure you are in the* ***Professional\_Workforce*** *script as you can have several scripts on at once. Click on the tab if required* (**image 6.2** – highlighted yellow circle**)**

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|  |
| * 1. Image highlighting workforce r project (highlighted in red) and script (highlighted in **black**) which will need to be run within the R project to create new report |

1. If you are in the correct r script you should see the ‘***Render***’ button (see **image 6.2** - highlighted with **black** circle).
   * Click ‘**Render**’ button and after a **few minutes**, if successful a new file will appear (**Professional\_Workforce.html**) or replace existing (see **image 6.1**). You may even see this report automatically render.
2. Share the *.html* file with stakeholders (you may rename it if needed)

# Create 6-monthly Report

⚠️ **NOTE:** *This will be following exactly the same process as in section 6, but running checkin\_6Month.qmd instead*

1. Open R project (**Rproject\_checkin.Rproj**) from your directory (**image 7.1 –** highlighted in red)

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|  |
| * 1. Image highlighting **Rproject\_checkin**.**Rproj** project (highlighted in red) and **checkin\_6Month.qmd** script (**highlighted in black**) which will need to be run within the R project to create new report |

1. When the R project opens, if you **don’t** see *checkin\_6Month* in top left pane (see **image 7.2** -highlighted in yellow), click:
   * File 🡪 Open File 🡪 *checkin\_6Month*.qmd. (**image 7.1 -** highlighted in **black**)
   * *You should now see this script open in top left pane*. (**image 7.2 -** highlighted with red circle)

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| * 1. Image highlighting **Rproject\_checkin** project (highlighted in red) and script (**highlighted in black**) which will need to be run within the R project to create new report |

⚠️ **NOTE:** *Make sure you are in the* ***checkin\_6Month*** *script as you can have several scripts on at once. Click on the tab if required* (**image 7.2** – highlighted in yellow**)**

1. If you are in the correct r script you should see the ‘***Render***’ button (see **image 7.2** - highlighted with **Black circle**).
   * Click ‘**Render**’ button and after a **few minutes**, if successful a new file will appear (***checkin\_6Month*.html**) or replace existing. You may even see this report automatically render.
2. Share the *.html* file with stakeholders (you may rename it if needed)

# Important Notes

* Always save last month’s data in **data/old\_data/** before replacing with new files
* When updating **data.csv** file from check-in dashboard, ensure data is up-to-date
* Do not edit column names or file formats in the CSVs, the scripts expect consistent structure

# Quick Checklist

✅ Create copy of old files to data/old\_data/

✅ Update data file using data from check-in survey PowerBi dashboard

✅ Save new files in data/

✅ Open **Professional\_Workforce.qmd** or ***checkin\_6Month.qmd*** in Rstudio project (**Rproject\_checkin.Rproj**)

✅ Click **Render**

✅ Share the newly generated report