People and Money system

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Line Manager – How to view Line Manager dashboard

Line Manager

Estimated time to complete: Insert time

Before you start, make sure you know…

1. How to log in and log out
2. How to navigate People and Money

The information in this guide details how to view workforce information for a direct or indirect report (Line Manager), or an individual in your area of responsibility (Line manager with SDA role) using the Line Manager dashboard app.

In Brief…

This is a simple overview of the process.

1. From the Home page click on ‘My Team’ if you are a Line Manager and select the ‘Line Manager Dashboard’ app
2. Select the correct tab – Headcount; Workforce Events or Workforce Trends to review the information for your direct and indirect reports

For detailed guidance, see the next section.

In Detail…

1. Line managers can access the line manager dashboard by click on ‘My Team’ and select the ‘Line Manager Dashboard’ app.

2. The ‘Line Manager Dashboard’ app is for line managers and returns data for the line manager’s direct and indirect reports. If you are a line manager who is also a School/Department Administrator then you will be able to bring back data for your Area of Responsibility.
3. If you selected the ‘Headcount’ tab, the following information will be displayed.

You can click on the three boxes – Headcount, FTE and Female employees
Go to point 7 to see further detail.

4. If you selected the ‘Workforce Events’ tab, the following information will be displayed.

You can click on the two boxes – Hires and Terminations to see further detail.
If you selected the ‘Workforce Trends’ tab, the following information will be displayed.

Workforce Trend information will build up over time, starting from 2021. **Note:** information showing from prior to 2021 is incomplete and should not be used.
6. If there are no joiners or leavers for the year you have selected the ‘Workforce Events’ and ‘Workforce Trends’ tabs will display a ‘No Results’ message. See below example:

7. You can click on the tiles at the top of each tab to drill down to the data and export it if required.
8. Example of the report that appears when you click on a tile:

9. If any of the source data is incorrect, then this can be corrected by raising the appropriate Service Request.
10. For info, there is a button at the top of the dashboard called ‘Catalog’. If you happen to click on this it will take you to the folder structure of the OTBI reporting tool. It is not possible to restrict your access to these folders. However it is only the folder names you are able to see, you will not be able to bring back any data.
11. OTBI folder structure:

Glossary

Please refer to Glossary

Appendix