



System User Guide

Annual Review Reporting Dashboard for Line Managers/SDA's and HR Partners

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk.

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Introduction

This guide covers key steps for Line Managers, SDA's and HR Partners in accessing and reviewing the **Annual Review Reporting Dashboard**.

As part of the University's Annual Review process, there needs to be a record in People and Money of the Annual Review conversation having taken place.

Before you begin, make sure you know...

- All employees should have the opportunity to have appropriate discussions about their objectives, performance, and development. You should familiarise yourself with the annual review information available on the [Annual Review pages](#) of the [Conversations Hub SharePoint site](#).

There are two reports available in the 'Annual Review Dashboard' App as follows:

- **Annual Review Check-in Report** – shows a list of all active employees and notes the status of the annual review check-in for the review period(s) selected.
- **Completed Annual Reviews** – shows the date and participants in the annual review meeting or the reason why an annual review was not conducted.

The reports are available for line managers at department level (direct and indirect reports), SDAs at business unit level (within their area of responsibility) and HR at organisational level. If you are a Line Manager who also has SDA or HR Partner access the report will retrieve data for all employees within your area of responsibility. Employees who have changed roles within the review period will only be displayed in their current assignment(s). The details of the person running the report will not appear.

The reports will show all employees within your area of responsibility. As of October 2025, ineligible Casuals and Unitemps staff are excluded from reports.

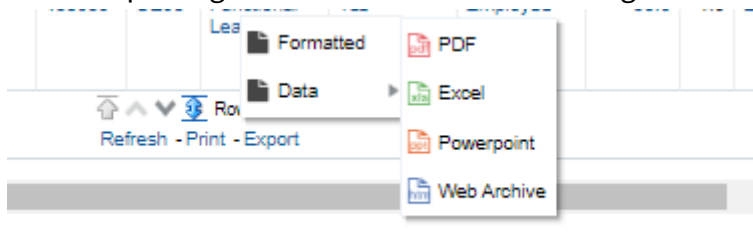
Typically, the annual review reporting period runs from 1 August to 31 July, but employees and managers have until the 31 August to input the dates of any meetings held or the reasons for non-completion. Please refer to the [How to record your Annual Review for employees / line managers](#) for further information.

If you have questions about the reports or the data returned on them, please raise a Service Request> Enquiry> Annual Review.

Data tables can be printed or exported into Excel. Click on the available options at the end of the table:

[Refresh](#) - [Print](#) - [Export](#)

When exporting the data we recommend using the “Formatted” and Excel option:



In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips are provided within the ‘In Detail’ section.

Accessing the reports

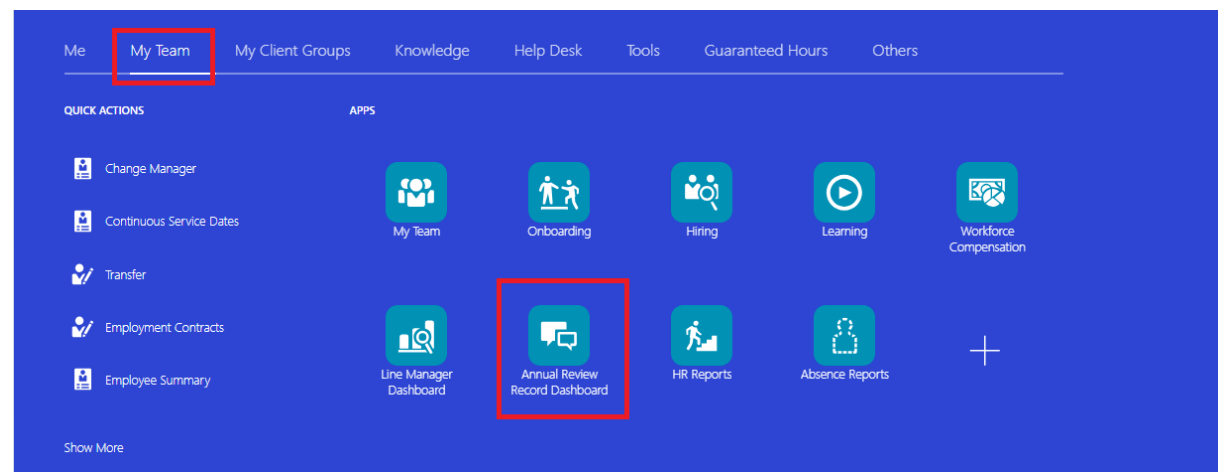
1. If you are a Line Manager, click on **My Team** and select the **Annual Review Reporting Dashboard App**.
2. If you are a School/Department Administrator (SDA) or HR Partner, click on **My Client Groups** and select the **Annual Review Reporting Dashboard App**.
3. On the tab **Annual Review Check-In report**, select the **Review Period** and apply relevant **filters** as required, then select apply.
4. To review the details of the completed check-ins, go to the **Completed Annual Reviews** tab and apply relevant **filters** as required, then select apply.

In Detail

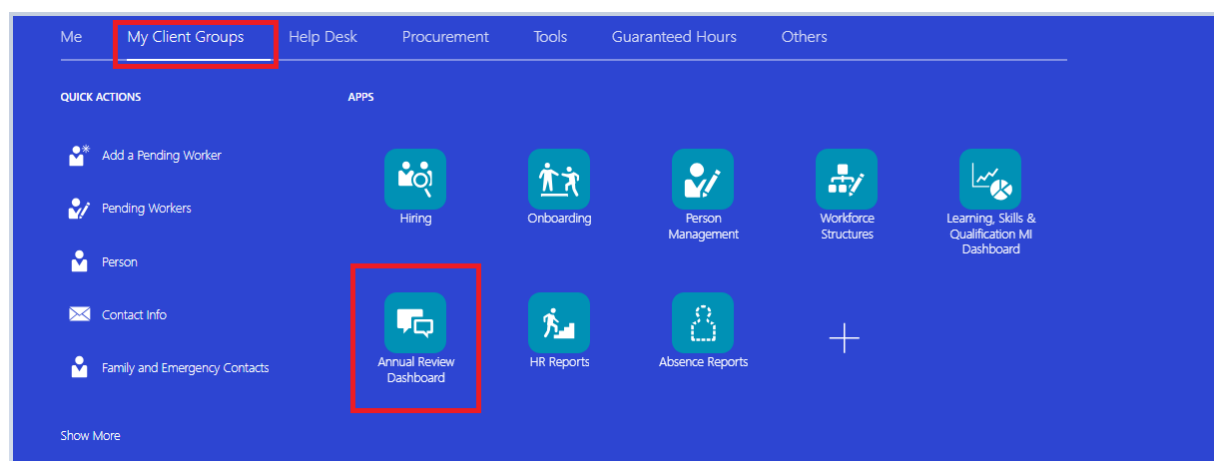
This section provides the detailed steps and includes relevant screenshots from the system.

Accessing the reports

1. If you are a Line Manager, click on **My Team** and select the **Annual Review Record Dashboard App**.



2. If you are a School/Department Administrator (SDA) or HR Partner, click on **My Client Groups** and select the **Annual Review Dashboard App**.



3. The welcome page of the dashboard introduces the report and its parameters.

Viewing the Annual Review Check-In report

1. Navigate to the **Annual Review Check-In report**.
2. **Select the Review Period** and filter the report as required using the following:

- College /Professional Services Group
- School/Planning Unit
- Department
- Sub Department (CMVM only)
- Job Family
- Worker Category

Then select **Apply**.

Annual Review Check-in

Welcome PageAnnual Review Check-inCompleted Annual Reviews

Annual Review Check In Report

Review Period

Use Review Period 2023/2024

Business Unit Name

--Select Value--

College/Professional Services Group

--Select Value--

School/Planning Unit

--Select Value--

Department

--Select Value--

Sub Department (CMVM only)

--Select Value--

Job Family

--Select Value--

Worker Category

(All Column Values)

Apply

Reset

Person Number	Assignment Number	First Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMVM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status Type	Number of Check-ins in Review Period
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational		35	Active	
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational		35	Active	
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational		35	Active	
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational		35	Active	
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes			31/12/2024	Fixed Term	Employee	Professional, Administration and Operational		35	Active	
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services		Yes				Open Ended	Employee	Professional, Administration and Operational		35	Active	

3. Scroll along to the right-hand side of the report and review the column titled **Number of Check-Ins in Review Period**, to establish the annual review status.

- A “1” means the person has had an annual review check-in recorded in the system in the review period selected.
- A “0” means that no status update has been logged in the system. (Please refer to the [How to record your Annual Review for employees / line managers](#) for further information).

Use the arrows in the **Number of check-ins in review period** column to sort this into ascending order so that everyone with a '0' is at the top. This means that no status update has been logged in the system.

Assignment Number	First Name	Preferred Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMVM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status Type	Number of Check-ins in Review Period	Employee Email	Manager Name	Manager E-Mail
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	1			
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	1			
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	0			
				University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	0			

Viewing the Completed Annual Reviews report

1. The review period is carried over from the selection made on previous page but can be amended here, this will also update on the previous tab if changed.

Filter the report as required using the following:

- School/Planning Unit
- Department
- Sub Department (CMVM only)
- Job Family
- Worker Category
- Manager Name
- Check-in date

Then select **Apply**.

Annual Review Check-in
Welcome Page
Annual Review Check-in
Completed Annual Reviews
Favourites
Dashboards
Create
Open

Completed Check-in Report
Details on all annual review check-ins. Filter and export the information if you want to analyse the questionnaire responses. The questionnaires gather information to understand the annual review process, focusing on date of the meetings, participants in the meetings and reasons for why meetings were not conducted.

* Review Period
Unit Review Period 2023/2024
Business Unit Name
--Select Value--
College/Professional Services Group
--Select Value--
School/Planning Unit
--Select Value--
Department
--Select Value--
Sub Department (CMVM only)
--Select Value--
Job Family
--Select Value--
Worker Category
(All Column Values)
--Select Value--
Manager Name
--Select Value--
Check-in Date
Apply
Reset

Person Number	Assignment Number	First Name	Preferred Name	Last Name	Business Unit Name	College/Professional Services Group	School/Planning Unit	Department	Sub Department (CMVM only)	Primary Assignment Flag	Personal Job Title	Work Relationship Start Date	Projected End Date	Assignment Category	Worker Category	Assignment Type	Job Family	Normal Working Hours	Assignment Status Type	Review Period	Check-in Template Name	Check-in Date Name
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 26/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 26/06/2024
					University of Edinburgh	University Secretaries Group	Student Services Unit	Academic Services						Open Ended		Employee	Professional, Administration and Operational	35	Active	Use Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 26/06/2024

Please note, the report will display multiple rows per employee per review period. The example below shows the completed annual review for one employee which was recorded by the Line Manager.

Review Period	Check-In Template Name	Check-in Doc Name	Check-in Doc Creation Date	Check-in Date	Check-in Last Update	Worker Question Text	Worker Response Text	Worker Response List	Manager Question Text	Manager Response Text	Manager Response List
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q1. Did the employee have an Annual Review/Performance and Development Review discussion this academic year (August to July)?		Yes
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q2.2 Record the date of the Annual Review/Performance and Development Review:	2024-06-19	
UoE Review Period 2023/2024	Annual Review Completion Record	Annual Review Completion Record 19/06/2024	20/06/2024	19/06/2024	20/06/2024				Q3. This meeting was held with:		Line Manager (you)

If the check-in was to record non-completion of an annual review (e.g., because of absence), this will also be displayed.

Appendix

Appendix A – *Clinical Grades*

Clinical Grades not included within the reports are as follows, due to them following the NHS process:

- AC3A
- AC3B
- ACN2
- ACN3
- ACN4
- ACT3
- ACT4
- AM3B
- AMN2
- AMN3
- AMN4
- AMT4

Version History

Version	Date	Description	Approved By
0.1			
1.0			
2.0	October 2025	Updated to Redwood Template for 25C.	M Easton

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.