



System User Guide

Line Manager Guide – How to view Line Manager Dashboard

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Introduction

This guide covers key tasks for **line managers** in ‘How to view Line Manager Dashboard’ system process.

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

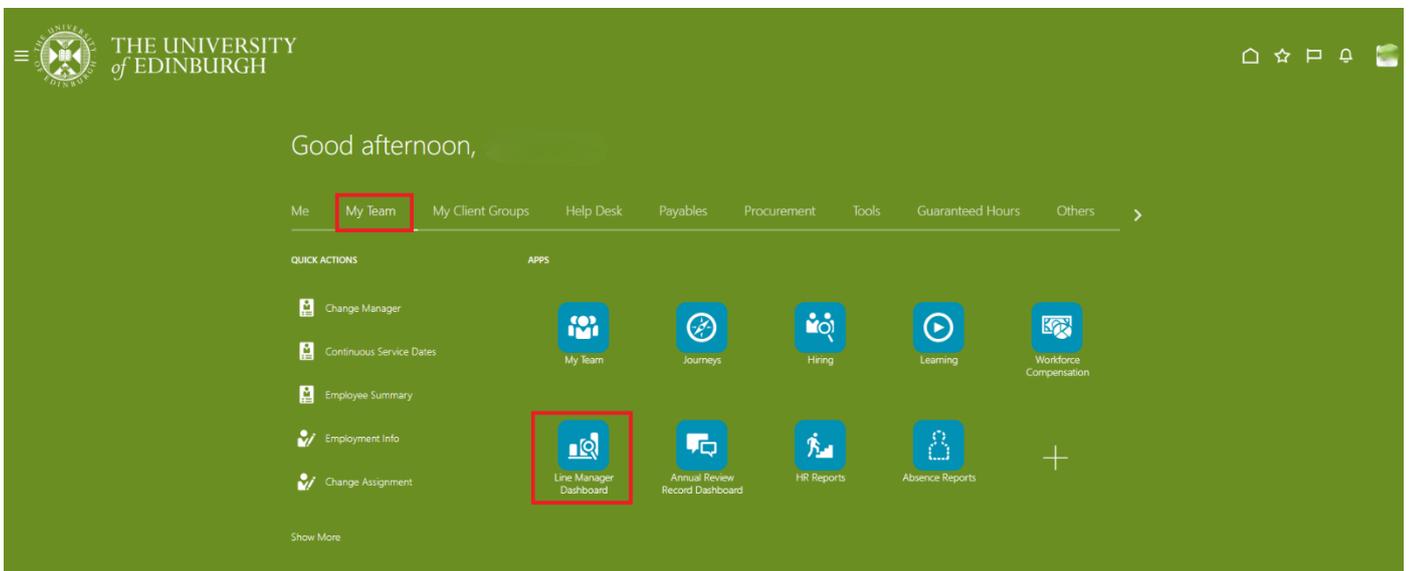
This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

1. Click on '**My Team**' and select the '**Line Manager Dashboard**' app
2. Select the correct tab – Headcount; Workforce Events; Workforce Trends; Learning Transcript; Licences and Certificates to review the information for your direct and indirect reports.

In Detail

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

1. Click **My Team** and select the **Line Manager Dashboard** app.



Note: The 'Line Manager Dashboard' app is for line managers and returns real time 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.

2. If you selected the **'Headcount'** tab, the following information will be displayed.



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

Filters down left hand side now display:

- Business Unit
- College/ Professional Service Group (PSG)
- School/ Planning Unit
- Department
- Grade
- Job Family
- Person Type
- Assignment Status
- Assignment Category
- Primary Assignment

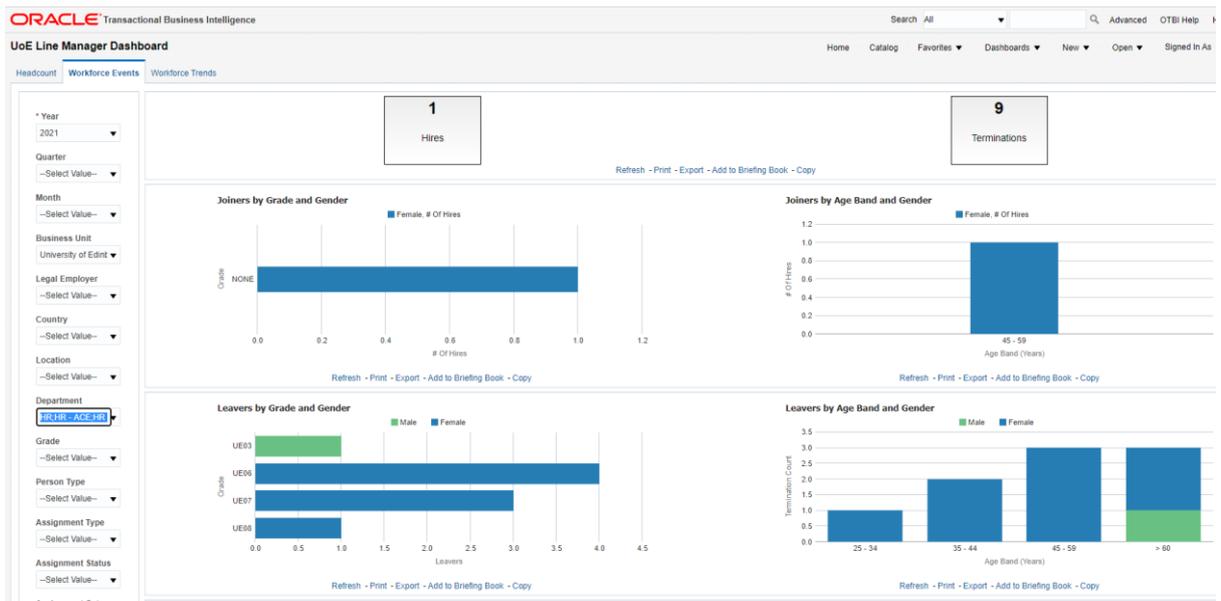
The [Appendix](#) shows the content of these dropdowns.

A number of default filters have been set up on each tab (Employee and Active Payroll Eligible) but these can be amended as required.

You can use multiple filters. Example below shows all Fixed Term, UE07, Professional, Administration and Operational Staff across the University of Edinburgh.

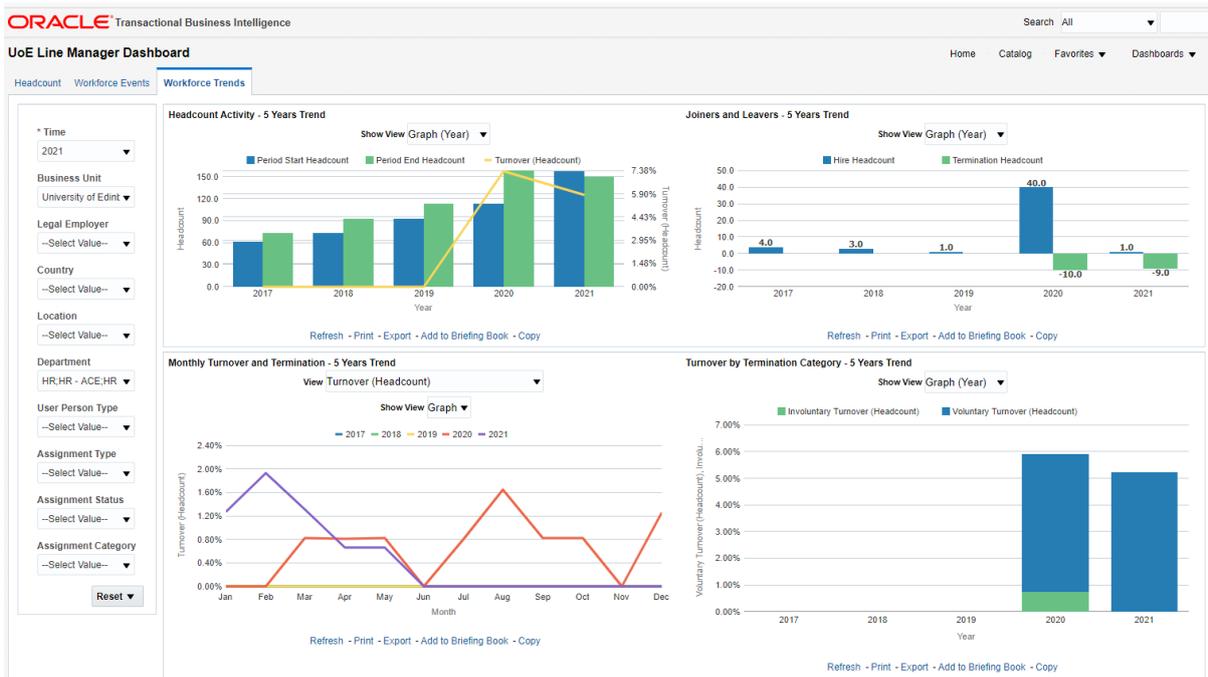


3. If you selected the **'Workforce Events'** tab, the following information will be displayed.

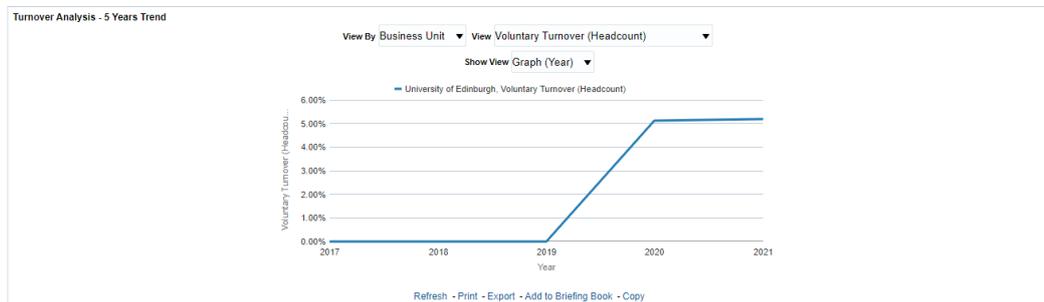


You can click on the two boxes – Hires and Terminations to see further detail.

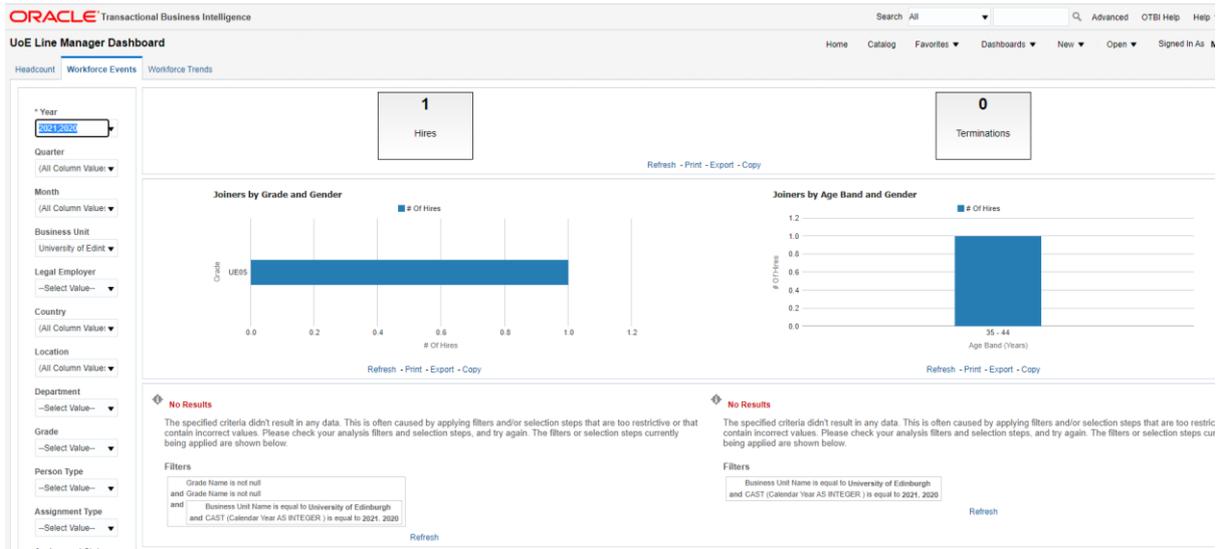
4. If you selected the 'Workforce Trends' tab, the following information will be displayed.



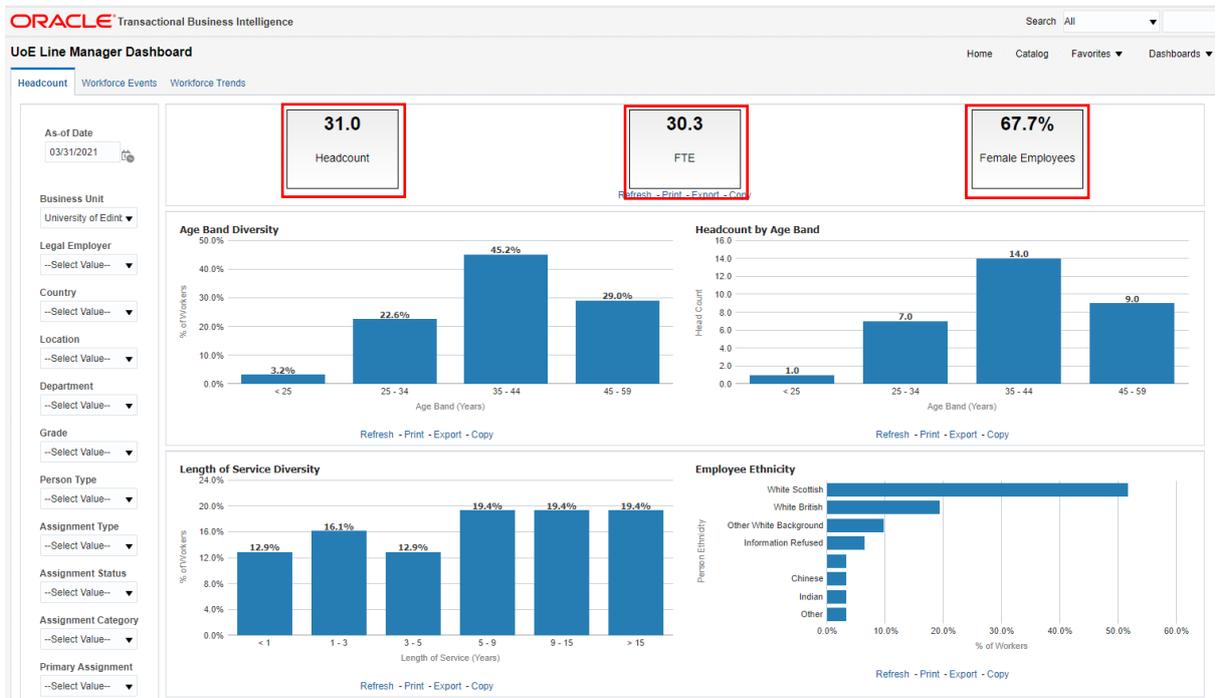
Workforce Trends information will build up over time, starting from 2021. **Note:** prior to 2021 the data is incomplete and should not be used.



5. 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:



6. You can click on the tiles at the top of each tab to drill down to the data and export it if required.



7. Example of the report that appears when you click on a tile:

UoE Line Manager Dashboard

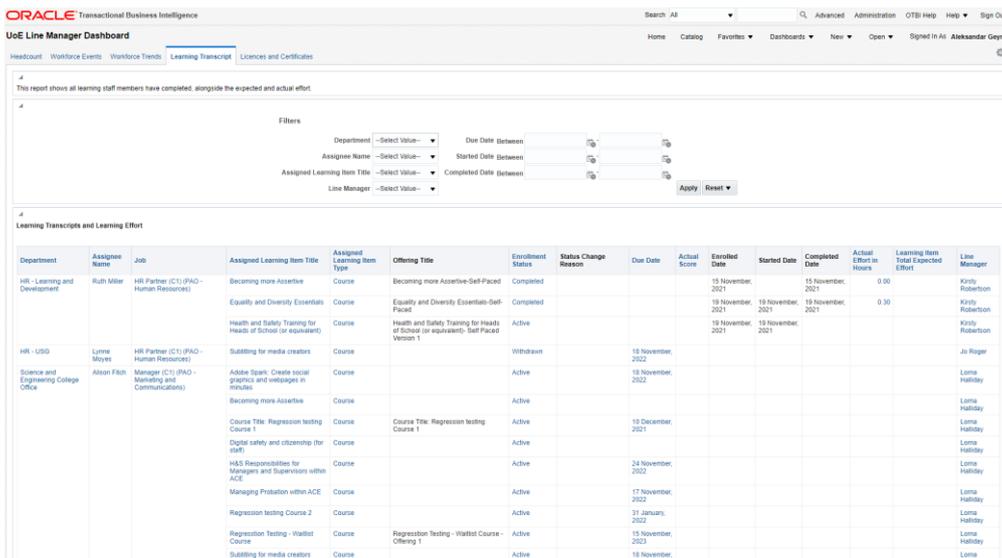
Female Employee Details

Person Number	Persion Name	Business Unit	Department	Location	Job	Position	Grade
██████	██████	University of Edinburgh	Philosophy, Psychology and Language Sciences	Dugald Stewart Building	Head of (C1) (PAO - Administration)	Head of (C1) (PAO - Administration)	UE07

Return - Refresh - Print - Export - Create Bookmark Link - Copy

-  PDF
-  Excel 2007+
-  Powerpoint 2007+
-  Web Archive (.mht)
-  Data

- If you selected the 'Learning Transcript' tab, all of the learning that your direct and indirect reports have undertaken will be displayed. The transcript information will build up over time, starting from Nov 2021.



- You can use the date filters to narrow down the date range results are being displayed for.

Filters

Department Due Date Between

Assignee Name Started Date Between

Assigned Learning Item Title Completed Date Between

Line Manager

- If you selected the 'Licences and Certificates' tab, all of the licences and certificates that your direct and indirect reports have added to their Skills and Qualifications profiles will be displayed.

UoE Line Manager Dashboard

Home Catalog Favorites Dashboards New Open Signed In As: Alexander Gayne

Headcount Workforce Events Workforce Trends Learning Tracks Licences and Certificates

This report shows an overview of your team's licences and certificates.

Filters

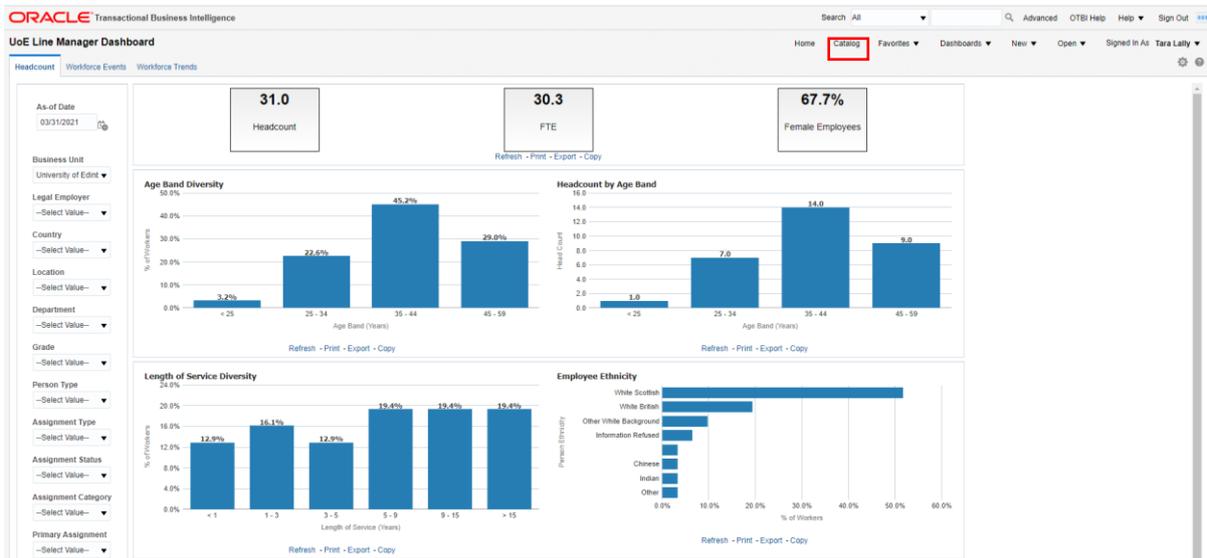
Profile Section: -Select Value-
License or Certificate: -Select Value-
Department Name: -Select Value-
Employee Name: -Select Value-
Status: -Select Value-
Expiration Date: Between: [] [] Apply Reset

Licences and Certificates Overview

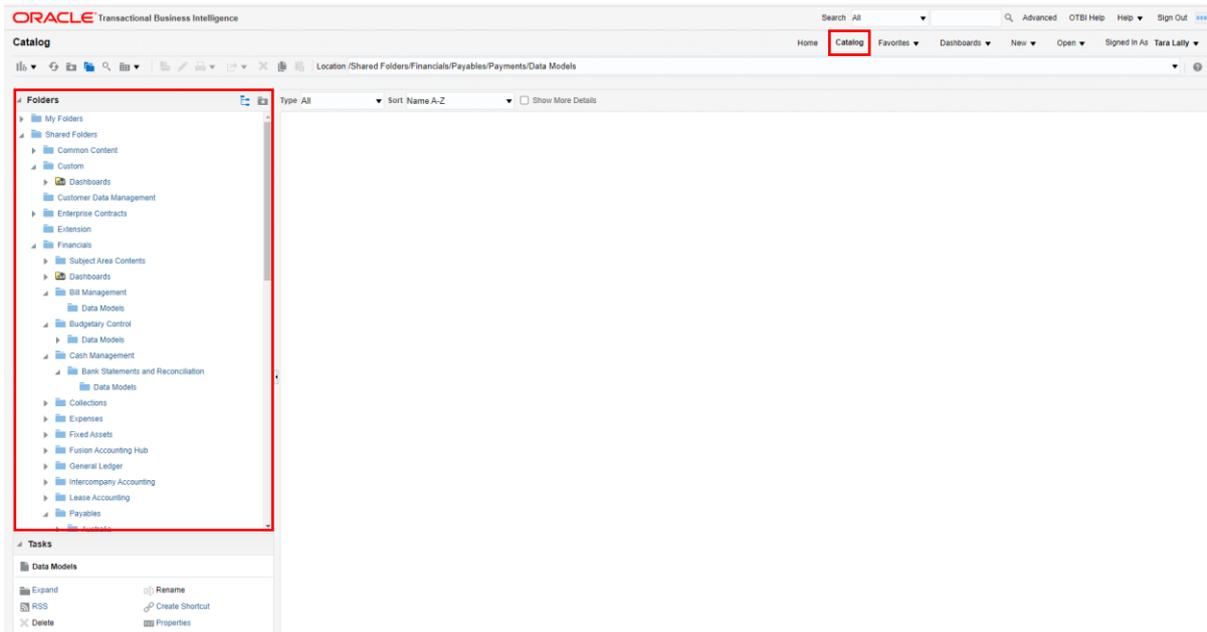
Department	Employee Name	Profile Section	License or Certificate	Certificate Status	Issue Date	Expiration Date	Renewal Required	Renewal Date	Issued By	Comments
Centre for Cardiovascular Science	Jessica Thompson	My Licences, Certifications and Registrations	Nurse and midwife	Active	12 September 2019	30 September 2022	Yes	30 September 2022	Nursing and Midwifery Council (NMC)	
Centre for Clinical Brain Sciences	Cerelia	My Licences, Certifications and Registrations	Doctor with basic training	Active	5 August 2015		No		General Medical Council	
	Symonds	My Licences, Certifications and Registrations	Doctor with basic training	Active			No		GMC	
Centre for Genomic and Experimental Medicine	Avantza Esmal-Zulfuara	My Licences, Certifications and Registrations	Registered Scientist	Active	1 October 2020		Yes	1 October 2021	Science Council	
Centre for Inflammation Research	Ahmad Abdalla	My Licences, Certifications and Registrations	Doctor, Specialist doctor	Active	1 July 2008			1 July 2022	High Medical Council	
	Avantza Esmal-Zulfuara	My Licences, Certifications and Registrations	Registered Scientist	Active	1 October 2020		Yes	1 October 2021	Science Council	
Centre for Open Learning	Anastasia Lamprell	My Licences, Certifications and Registrations	Biomedical Scientist						Florida International University	
Centre for Open Learning office	Anastasia Lamprell	My Licences, Certifications and Registrations	Biomedical Scientist						Florida International University	
	Antigon Kapacari	My Licences, Certifications and Registrations	Chartered Teacher of English	Active	8 October 1995		No	25 June 2019	Greek Ministry of Education	
	David Wintour	My Licences, Certifications and Registrations	Social Worker		1 June 2010				University of Plymouth	
	Francesca Sweeney-Andrews	My Licences, Certifications and Registrations	School teacher in State-maintained schools (secondary)	Active	1 September 1998		No		General Teaching Council for England	
	Susanna Fodme Stabo	My Licences, Certifications and Registrations	Chartered Linguist							
			Teacher in Further Education (England & Wales)		1 January 2008				Cambridge University	

11. If any of the source data is incorrect, then this can be corrected by the employee or line manager through self-service or by raising the appropriate Service Request.

12. 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.



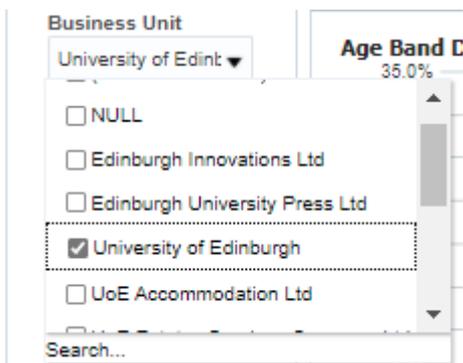
13. OTBI folder structure:



Appendix

We have set up a number of default filters but these can be added or removed if required by the manager.

Business Unit - defaults to University of Edinburgh (but subsidiaries also listed in filter)



College/PSG – contains Colleges & Professional Service Groups

College 30.0%
25.0%

--Select Value--

- College of Arts, Humanities and Social Sciences
- College of Medicine and Veterinary Medicine
- College of Science and Engineering
- Corporate Services
- Information Services
- University Secretarys Group

Search...

School/Planning Unit –contains Schools and Planning Units

School of Works 20.0%
15.0%

--Select Value--

- Accommodation, Catering and Events Unit
- Application Development and Operations Unit
- Arts, Humanities and Social Sciences, College of
- Bioresearch and Veterinary Services Unit
- Business School
- Centre for Open Learning

Search...

Department – contains Departments within the Schools and Planning Units

Department 5.0%
0.0% < 25 25

--Select Value--

- ACE Administration
- ACE Business Administration
- ACE Business Development
- ACE Catering
- ACE Festivals, Culture and City Events
- ACE Finance

Search...

Grade – lists all grades

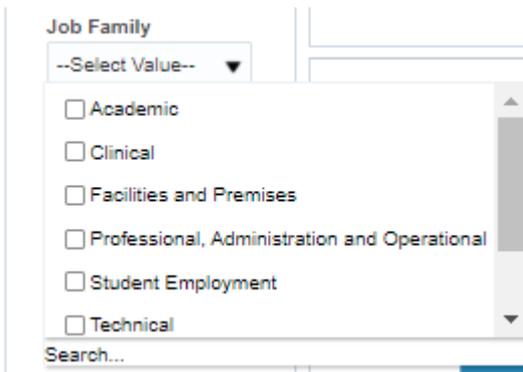
Grade

--Select Value--

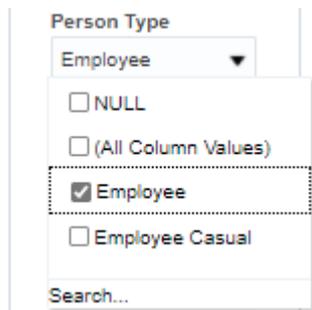
- UE02
- UE03
- UE04
- UE05
- UE06
- UE07

Search...

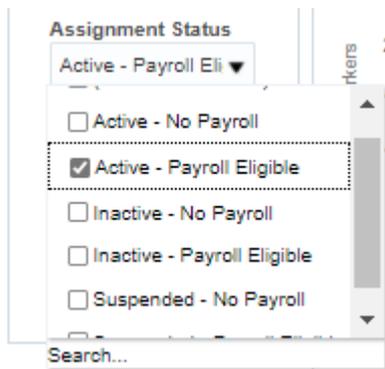
Job Family – lists all Job Families



Person Type – Defaults to Employee (but has future option of Employee Casual)



Assignment Status – Defaults to Active – Payroll Eligible (but list contains other options with system e.g. Inactive – Payroll Eligible used for leavers)



Assignment Category – Lists all Assignment Categories

Assignment Category

--Select Value--

- Casual
- Fixed Term
- Nonemploy
- Open Ended
- Secondment

Search...

Primary Assignment – enables you to select if data should contain only Primary Assignments, Secondary Assignments or All Assignments.

Primary Assignment

--Select Value--

- (All Column Values)
- No
- Yes

Version History

Version	Date	Description	Approved By
1.0	February 2026	<ul style="list-style-type: none">• Updated guide to new format• Updated screenshots	RM/SK

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.