THE UNIVERSITY *of* EDINBURGH

System User Guide

Line Manager Guide – How to view Line Manager Dashboard

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Contents

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.
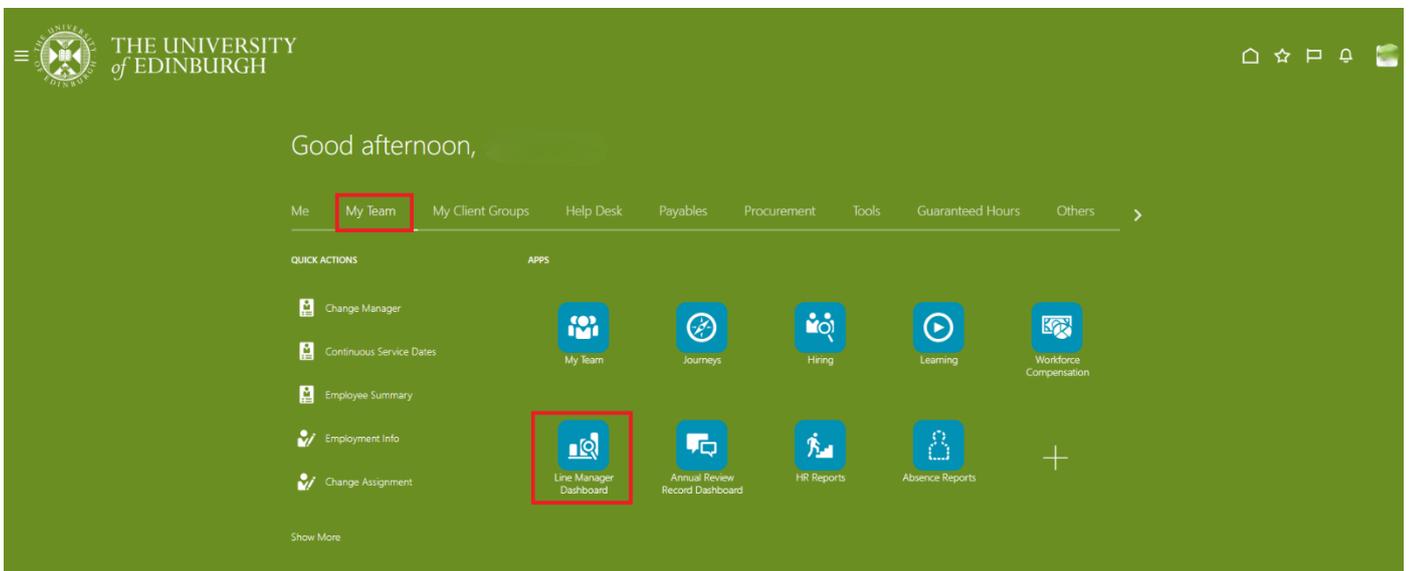
Note: The 'Line Manager Dashboard' app is for line managers and returns real time data for the line manager's direct and indirect reports. If you are a line manager who is also a School/Department Administrator then you will be able to bring back data for your Area of Responsibility.

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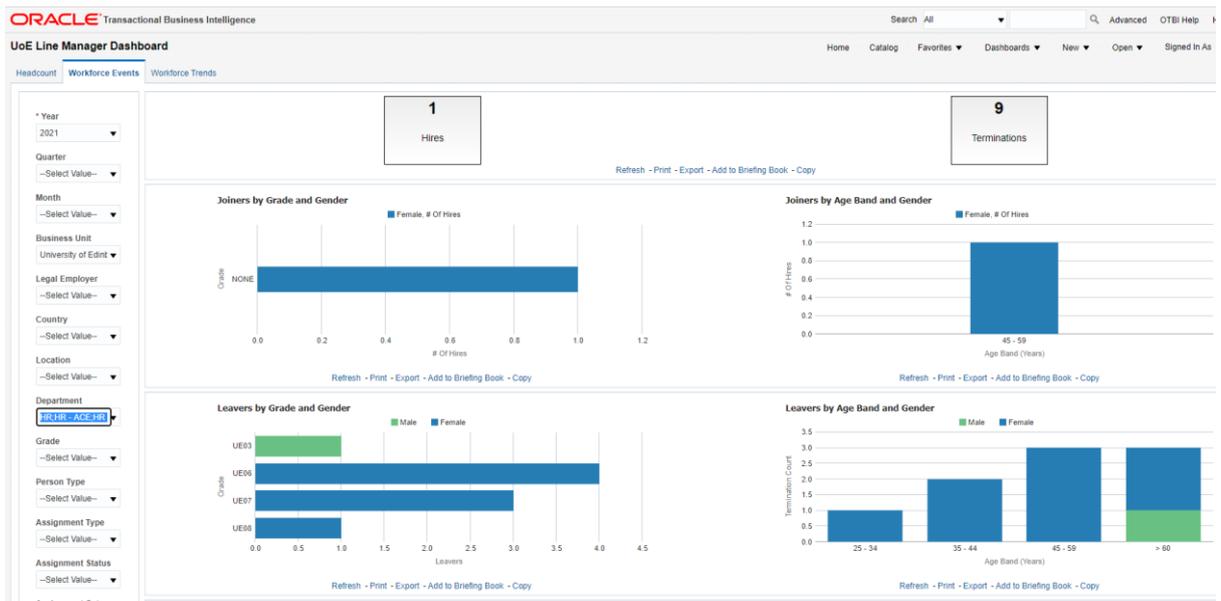
You can click on the two boxes – Hires and Terminations to see further detail.

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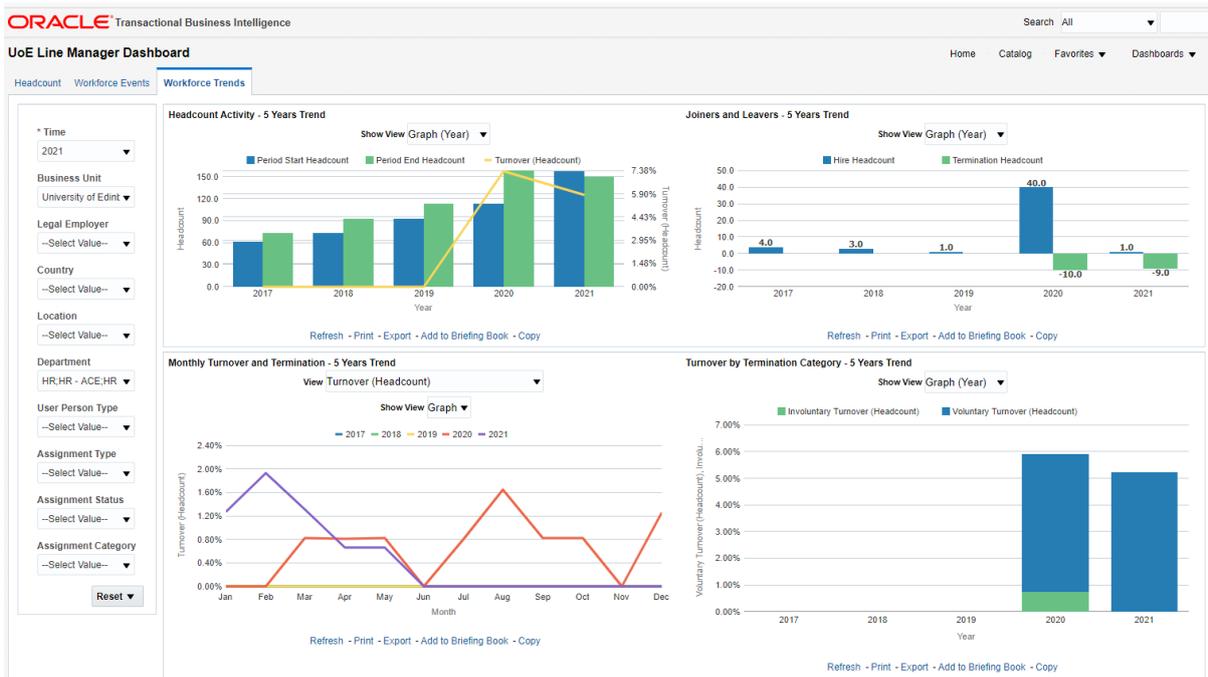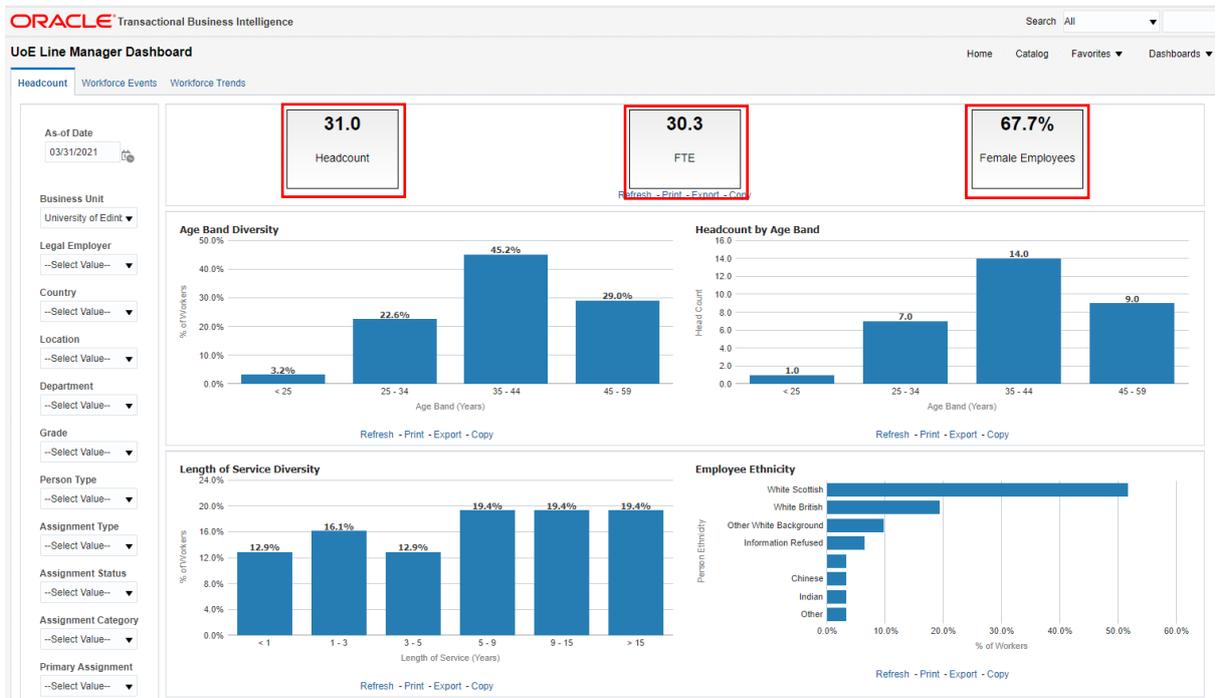

Workforce Trends information will build up over time, starting from 2021. **Note:** prior to 2021 the data is incomplete and should not be used.
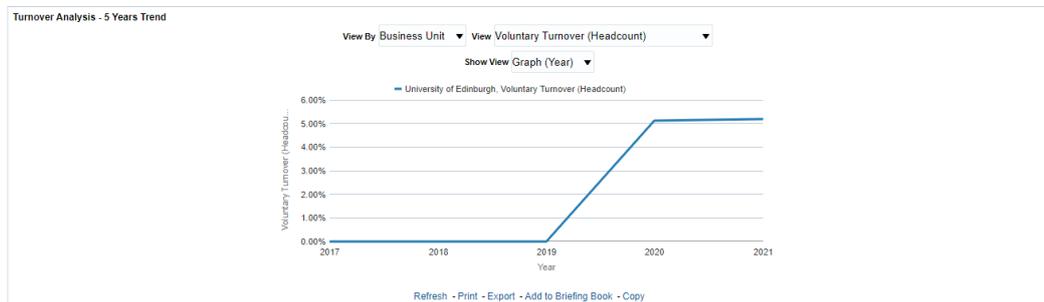
5. If there are no joiners or leavers for the year you have selected the 'Workforce Events' and 'Workforce Trends' tabs will display a 'No Results' message. See below example:
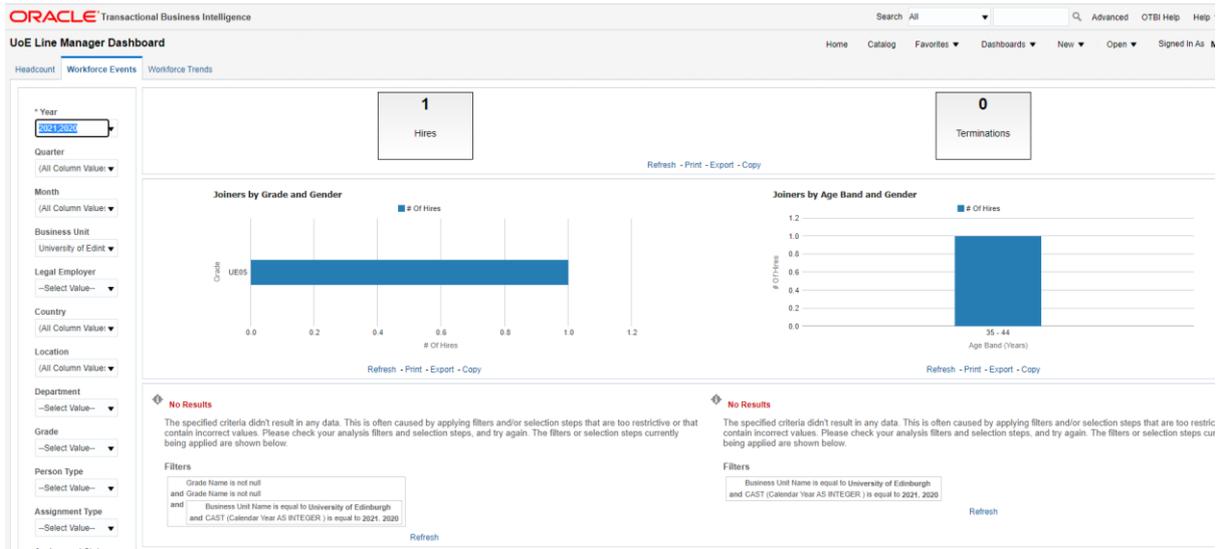
6. You can click on the tiles at the top of each tab to drill down to the data and export it if required.

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

8. 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.
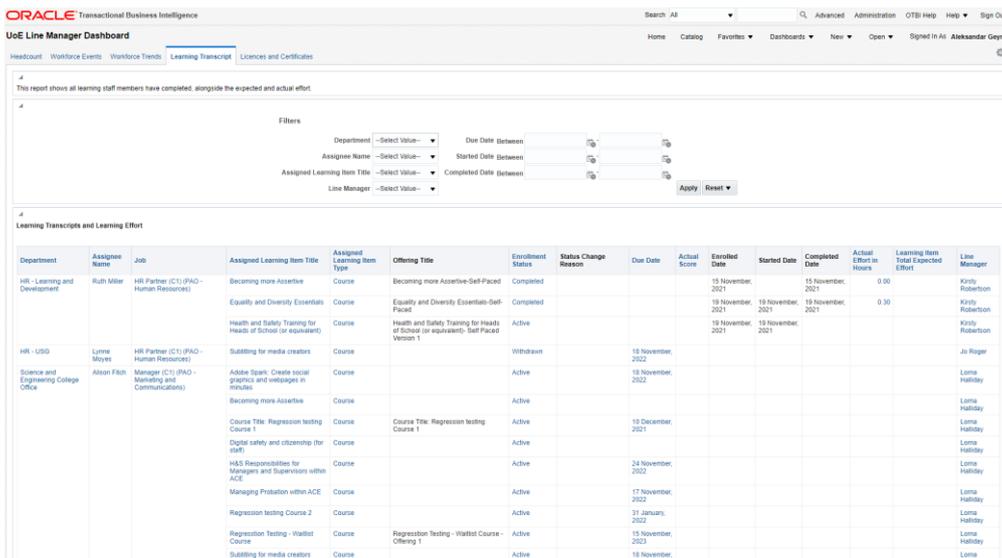
9. You can use the date filters to narrow down the date range results are being displayed for.

10. 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.

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.
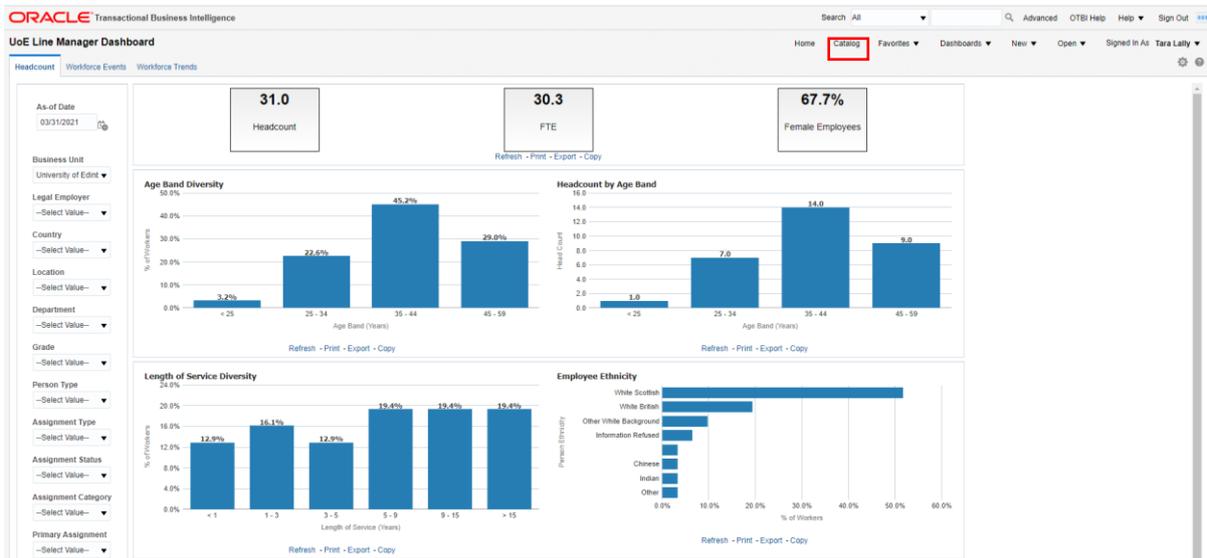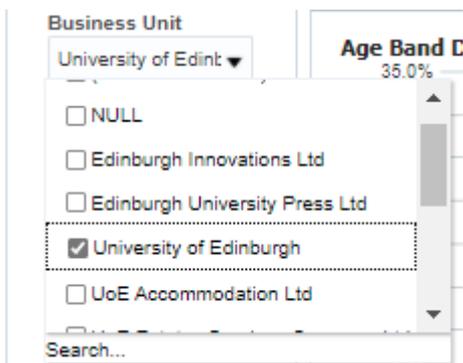
13. OTBI folder structure:
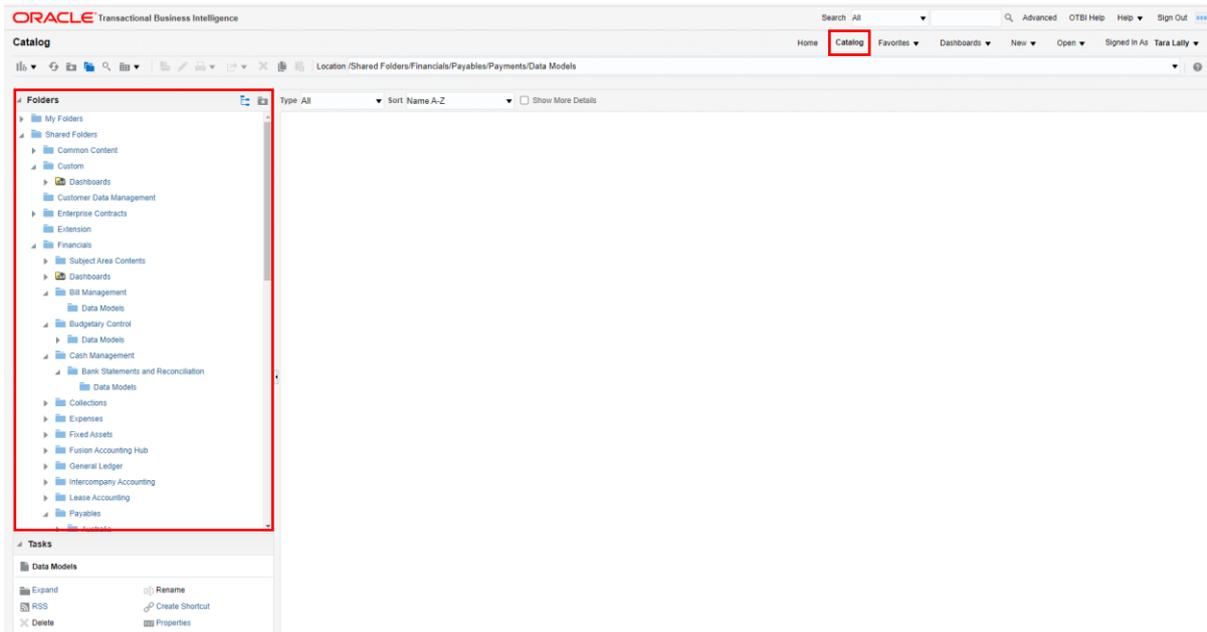
Appendix

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

School/Planning Unit –contains Schools and Planning Units

Department – contains Departments within the Schools and Planning Units

Grade – lists all grades

Job Family – lists all Job Families
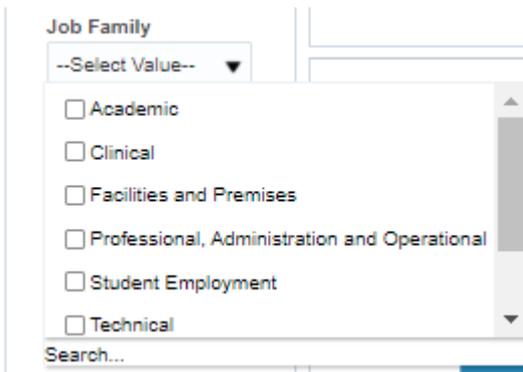
Person Type – Defaults to Employee (but has future option of Employee Casual)
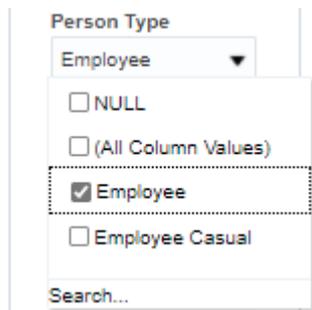
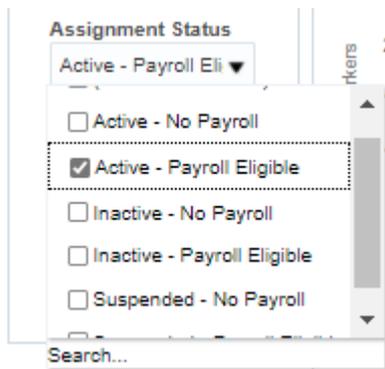**Assignment Status** – Defaults to Active – Payroll Eligible (but list contains other options with system e.g. Inactive – Payroll Eligible used for leavers)

Assignment Category – Lists all Assignment Categories

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

Version History

Version	Date	Description	Approved By
1.0	February 2026	• 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.