THE UNIVERSITY *of* EDINBURGH

System User Guide

Line Manager/Senior Manager/School Department Administrator/Time Keeper – How to view HR Reports

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

Contents

Introduction

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 line managers, senior managers, School/Department Administrators (SDAs) and Time Keepers can access the HR Reports app on People and Money to view the following reports:

- The All Staff Report
- Starters and Transfers
- Leavers and Transfers
- Assignment Costings
- Position Incumbents
- Time Card Report - The Time Card Report will only be visible to Line Managers and Time Keepers.

Line Managers will see data for their direct and indirect reports via My Team.

Senior Managers will see data for all employees with an assignment in their area of responsibility via My Client Groups.

SDAs will see data for all employees with an assignment in their area of responsibility via My Client Groups.

Time Keepers will see data for all employees with an assignment in their area of responsibility via My Client Groups.

Note: the person running the report will not be included in the results.

Please refer to the relevant sections of the People and Money User guides page for further information on processes and tasks in People and Money.

For more information on related policies please refer to the HR A-Z of Policies and Guidance

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.

Accessing HR Reports

1. From the Dashboard, click on **My Team**
   Note: if you're a Senior Manager, School/Department Administrator or Time Keeper, please select **My Client Groups.**
2. Select the **HR Reports** app and a new tab will open on your browser.

Running HR Reports

1. Select the relevant tab – All Staff Report, Starters and Transfers, Leavers and Transfers, Assignment Costings, Position Incumbents, Time Card report – to review the information for your direct reports. If

you also have SDA access you will be able to view information for all employees in your area of responsibility, except yourself.
Note: If you are a Senior Manager or SDA you will see information for all employees in your area of responsibility, expect yourself.
2. Use the filters to select the required information.
Note: when moving onto other Reports within the HR Reports Dashboard, filters should be **Reset** before running another Report.
3. Click **Apply** to view filtered results

If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message *'No Results: The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps, and try again'.* Review the filters you have applied and consider widening your search criteria.

Exporting Reports

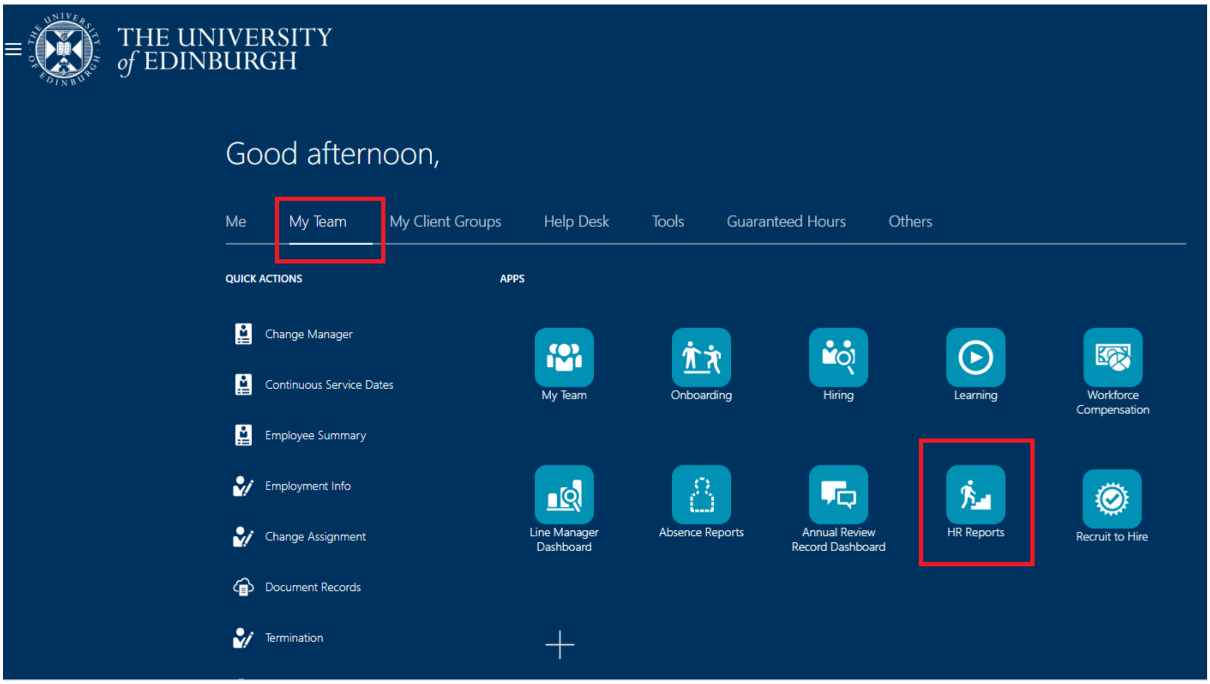
1. Export the data if required using the **Export** link (or the **View Report** icon within the Assignment Costings Report)

In Detail

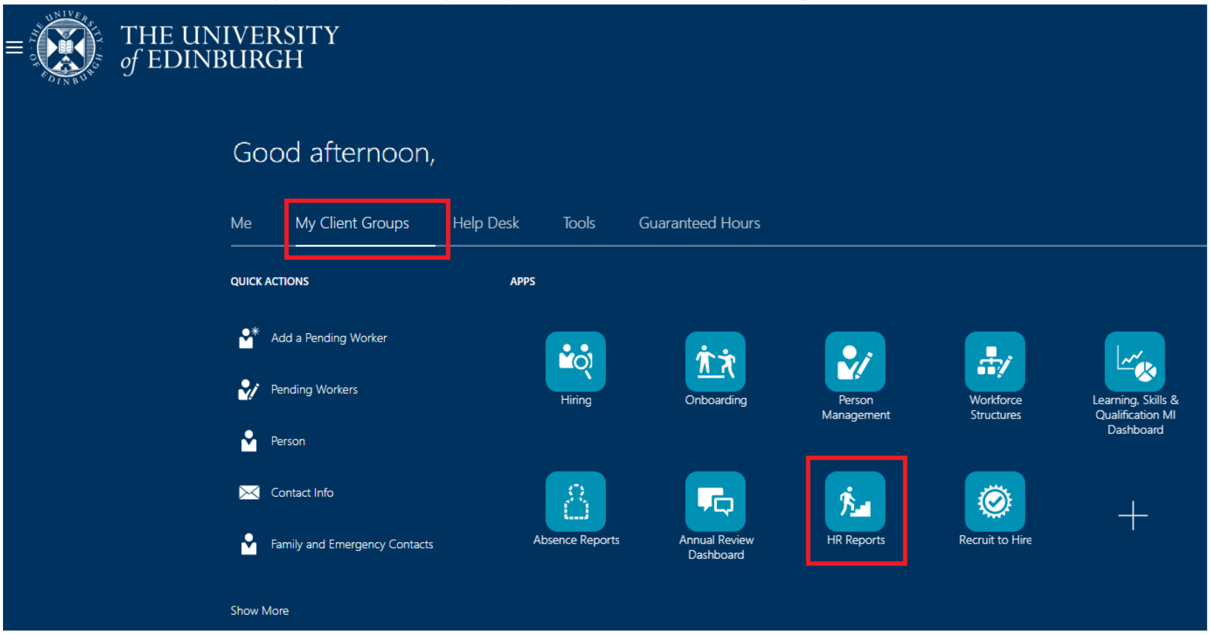
This section provides the detailed steps and includes relevant screenshots from the system.

Accessing HR Reports

1. From the Home page:
   a. Click on **My Team** if you are a line manager



   b. Click on **My Client Groups** if you are a Senior Manager or SDA:



2. Click the **HR Reports** tile and a new tab will open on your browser.

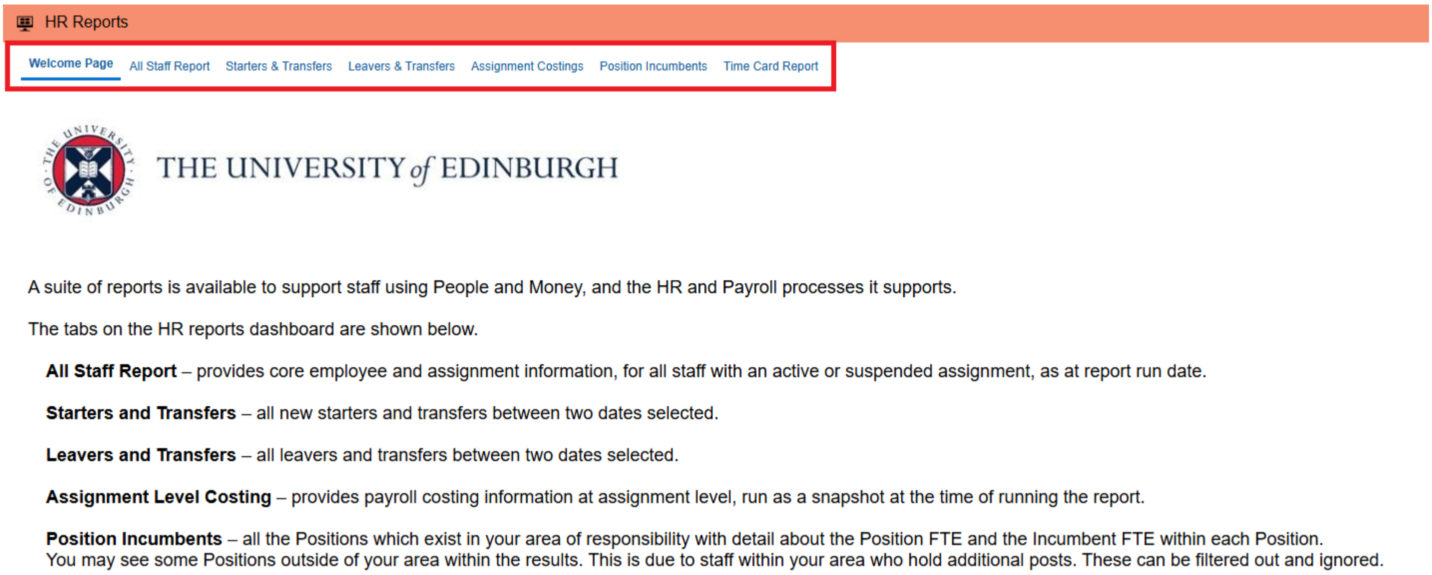
   The HR Reports Dashboard returns real time data for a line manager's direct and indirect reports.

If you are a School/Department Administrator, Time Keeper or have a Senior Manager role, then you will be able to return data for any employee with an assignment within your Area of Responsibility.

If you are a line manager who is also a School/Department Administrator then you will be able to return data for your direct and indirect reports via **My Team**, and for your Area of Responsibility via **My Client Groups**.

Note: the person running the report will not appear in the results.

Dashboards are displayed in tab format, with a welcome page containing a short description of the dashboard purpose, and the report names displayed on each tab:

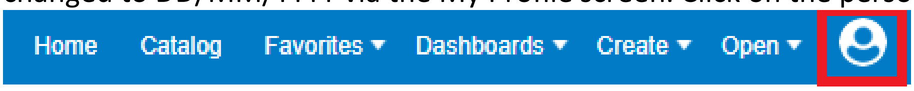


Managers and School/Department Administrators will see the same tabs, with the same column headings, however the data returned will vary according to each user's security access.

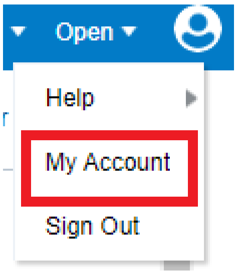
If you are a Time Keeper the Time Card Report will be the only report visible unless you also have Line Manager, SDA or Senior Manager access.

Date Format

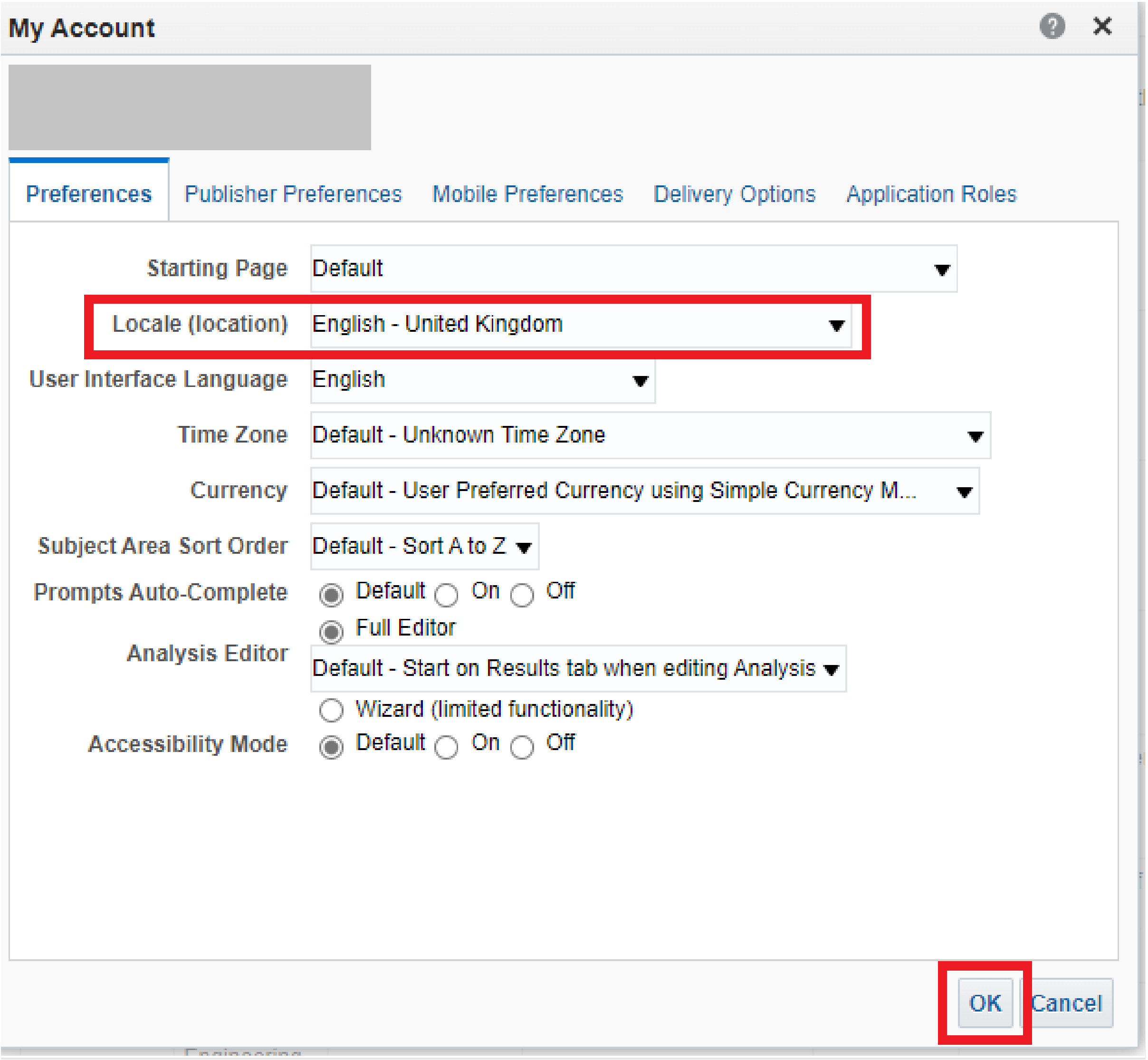
Depending on your settings, you may notice some date formats displayed as MM/DD/YYYY. This can be changed to DD/MM/YYYY via the My Profile screen. Click on the person icon in the top right corner:



Choose **My Account**



In the pop up window that follows, ensure you are in **Preferences** then change the **Locale (location)** field to 'English – United Kingdom' and click **OK.**

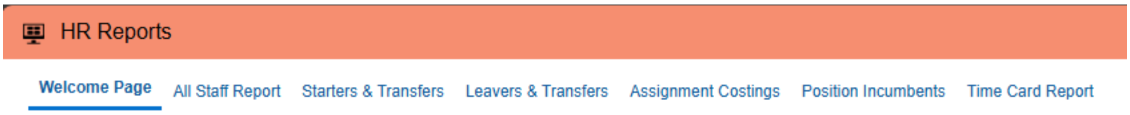


The next time you log in your date settings will display as DD/MM/YYYY.

***Note**: there is a button at the top of the dashboard called 'Catalog'. If you 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 only the folder names are visible, you will not be able to return any data.*

Running HR Reports

1. **Select the relevant tab** – All Staff Report, Starters & Transfers, Leavers & Transfers, Assignment Level Costing, Position Incumbents or Time Card Report:



2. Use the **optional filters** to select the required information. Note: when moving onto other Reports within the HR Reports Dashboard, filters should be **Reset** before running another Report.

3. Click **Apply** to view filtered results.

   If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message *'No Results: The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps and try again'.* You may wish to widen your search criteria.

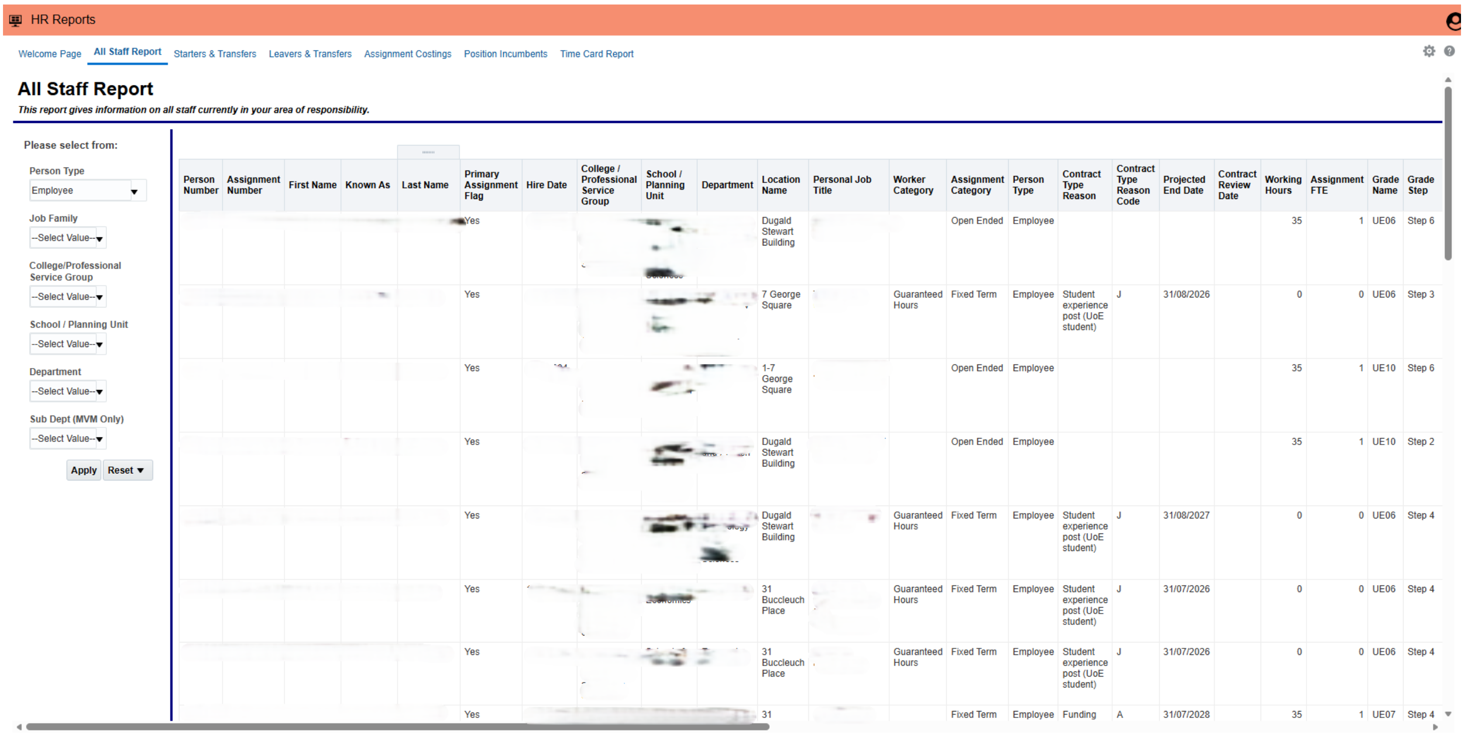
For specific information on each of the reports, please see the next sections.

All Staff Report

The All Staff Report has a number of filters available:

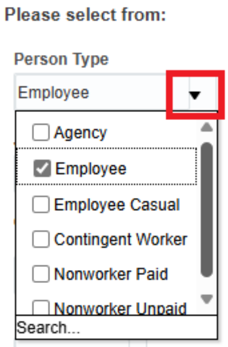
- **Person Type** - Agency, Employee, Employee Casual, Contingent Worker, Nonworker Paid, Nonworker Unpaid
- **Job Family** – Academic, Clinical, Facilities and Premises, Professional, Administration and Operational, Student Employment, Technical, Tutors and Demonstrators, Veterinary Clinical
- **College/Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (input only for MVM College)**

See Appendix 1 for a full list of columns available in the report.



Data is shown as at the date the report is run.

The report defaults to show only those with the person type **'Employee'**, however other person types are available (for example Employee Casual, Contingent Worker, Nonworker Paid and Nonworker Unpaid). You can include any or all of these, by clicking on the down arrow next to the field **Person Type**, selecting the relevant option from the list and clicking **Apply** to view the results. Follow the same steps to apply any of the other filters.



Future new starts **will not** be included in the All Staff Report until their hire date.

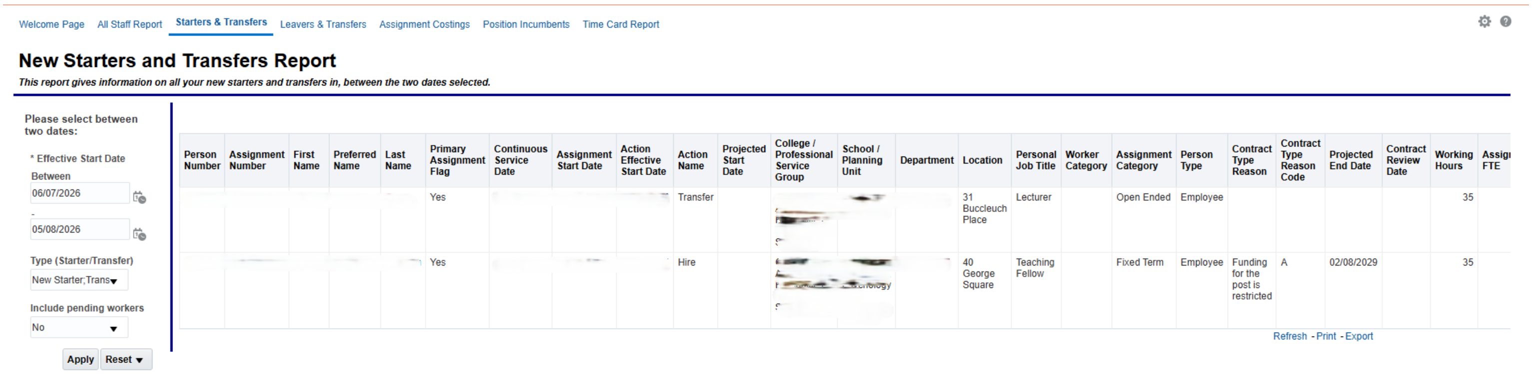
Employees who have a future termination in People and Money will continue to show on the report until their termination date has passed and their assignment becomes inactive.

The Job Level field is included in this report.

Please note that if an employee has multiple assignments, **the report will only display the work schedule for the primary assignment**. Non-primary assignments will display a blank field in the work schedule column. Please check the employee record in People and Money to see the work schedule for any non-primary assignments.

Starters & Transfers

The Starters & Transfers report displays all new starters and ‘transfers in’ (employees joining the team or Area of Responsibility) with an effective start date between two dates. See Appendix 2 for a full list of all columns.



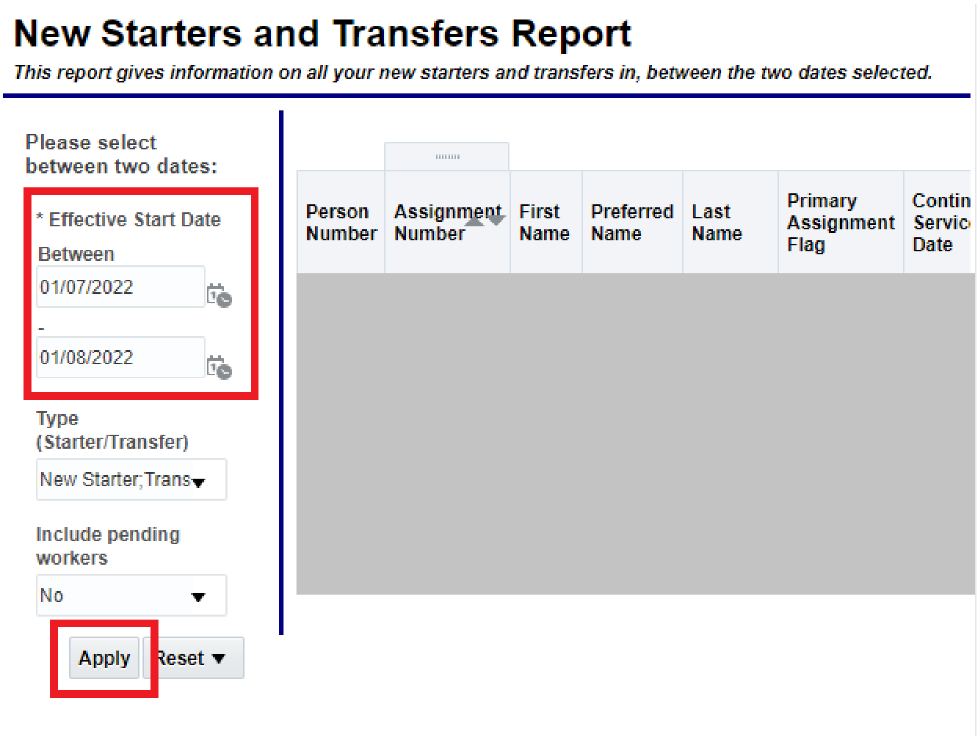
Note: if an individual is transferring out with your AoR, the report will only show the details of the post they are transferring to.

Starters & Transfers has the following filters available:

- Effective Start Date Between [date1] and [date2]
- Type (New Starter/Transfer)
- Include pending workers*

*A pending worker is a person who has yet to start employment.

The dates default to show starters and transfers that have occurred within the previous 30 days. These can be altered by using the ‘Select Date’ button or by typing a date into the field in the format DD/MM/YYYY and clicking **Apply** to view the results.

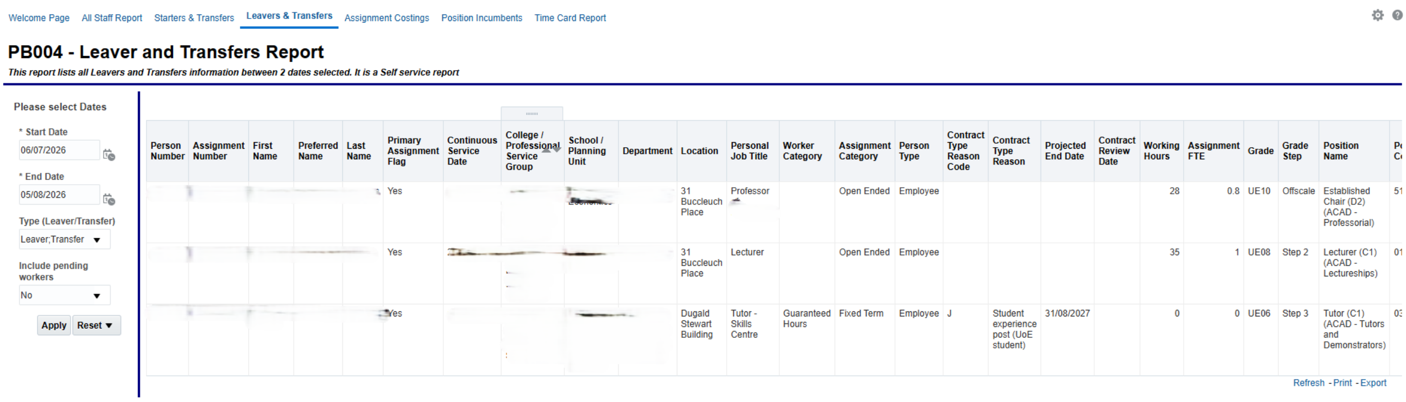


You can alter the other filters 'Type (New Starter/Transfer)' and 'Include Pending Workers' by clicking on the down arrow next to the field, selecting the relevant option from the list and clicking **Apply** to view the results. Note: when moving onto other Reports within the HR Reports Dashboard, filters should be **Reset** before running another Report.

Leavers & Transfers

The Leavers & Transfers report displays all new starters and 'transfers out' (employees leaving the team or Area of Responsibility) with an effective start date between two dates. See Appendix 3 for a full list of columns.

Note: if an individual is transferring out with your AoR, the report will only show the details of the post they



are transferring to.

If an individual is a multiple assignment holder and is only leaving one of their posts, they will **not** appear on the report. They will only appear on the report when their entire work relationship with the University is terminated.

Leavers & Transfers has the following filters available:

- Effective Start Date Between [date1] and [date2]
- Type (Leaver/Transfer)
- Include pending workers*

*A pending worker is a person who has yet to start employment.

The dates default to show leavers and transfers that have occurred within the previous 30 days. These can be altered by using the ‘Select Date’ button or by typing a date into the field in the format DD/MM/YYYY and clicking **Apply** to view the results. You can alter the ‘Include Pending Workers’ filter by clicking on the down arrow next to the field, selecting the relevant option from the list and clicking **Apply** to view the results.

Assignment Level Costing

The Assignment Level Costing Report displays all employees, except the person running the report, within the team or Area of Responsibility, with the costing segments that have been assigned, and the proportion. Note: when an employee has more than one source of funding, the report will display a row for each source.

EE No	Title	First Name	Last Name	Email address	Assignment Number	Hire Date	Projected End Date	Contract Review Date	Assignment FTE	Assignment Costing Effective Date	Grade	Grade Step	Primary Assignment Flag	Assignment Status	Personal Job Title	Person Type	Worker Category
									1	01-01-2021	UE09	Step 6	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE08	Step 8	Yes	Active - Payroll Eligible		Employee	
									0.8	01-01-2021	UE08	Step 7	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE08	Step 8	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE08	Step 7	Yes	Active - Payroll Eligible		Employee	
									1	03-04-2023	UE08	Step 4	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE08	Step 6	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE08	Step 7	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE07	Step 4	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE10	Step 4	Yes	Active - Payroll Eligible		Employee	
									0.9	01-01-2021	UE08	Step 6	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE07	Step 7	Yes	Active - Payroll Eligible		Employee	
									1	01-01-2021	UE07	Step 6	Yes	Active - Payroll Eligible		Employee	
									0.86	01-01-2021	UE09	Step 6	Yes	Active - Payroll Eligible		Employee	
									1	01-04-2022	UE07	Step 3	Yes	Active - Payroll Eligible		Employee	

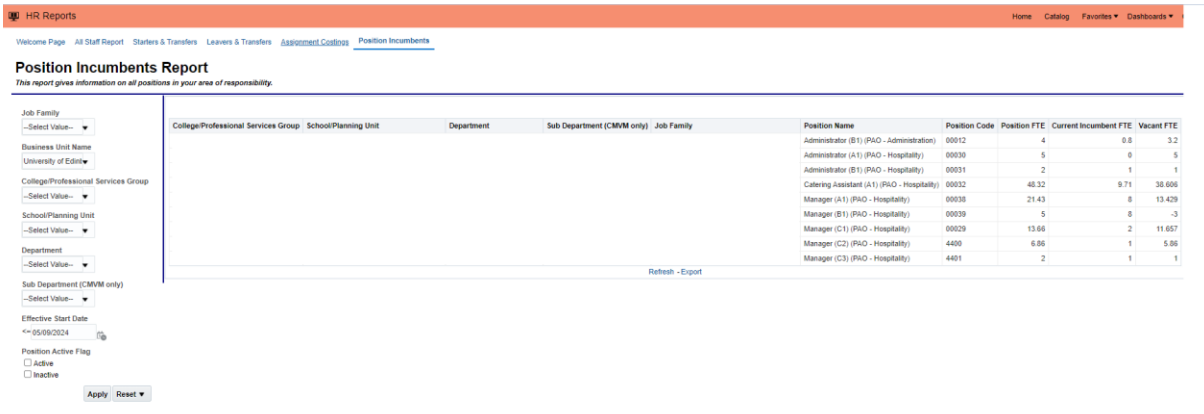
Assignment Level Costing has the following **filters** available:

- **Assignment Status**
- **User Type**
- **Worker Category**
- **Assignment Category**
- **Level 1 Department**
- **Level 2 Department**
- **Level 3 Department**
- **Level 4 Department**

See Appendix 4 for full list of columns contained in the report.

Position Incumbents Report

This report lists the positions which exist in your area with details about the position FTE and Incumbent FTE within each position. You may see some positions outside your area within the results, this is due to staff within your area who hold additional posts. These can be filtered out and ignored.



The Position Incumbents report displays the following **columns:**

- **College/Professional Services Group**
- **School/Planning unit**
- **Department**
- **Sub Department (CMVM only)**
- **Job Family**
- **Position Name**
- **Position Code**
- **Position FTE** (overall total position FTE)
- **Current Incumbent FTE** (number of FTE that currently hold that position)
- **Vacant FTE** (the difference between position FTE and current incumbent FTE)

The example below shows the section of the report that displays Position FTE, Current Incumbent FTE and Vacant FTE.

Position FTE	Current Incumbent FTE	Vacant FTE
4	0.8	3.2
5	0	5
2	1	1

Position Incumbents has the following **filters** available:

- **Job Family**
- **College/Professional Services Group**
- **School/Planning Unit**
- **Department**
- **Sub Department (CMVM only)**
- **Effective Start Date**
- **Position Active Flag**
    - **Active**
    - **Inactive**

If you notice any positions with incorrect FTE assigned (shown in the Position FTE column), you can raise a

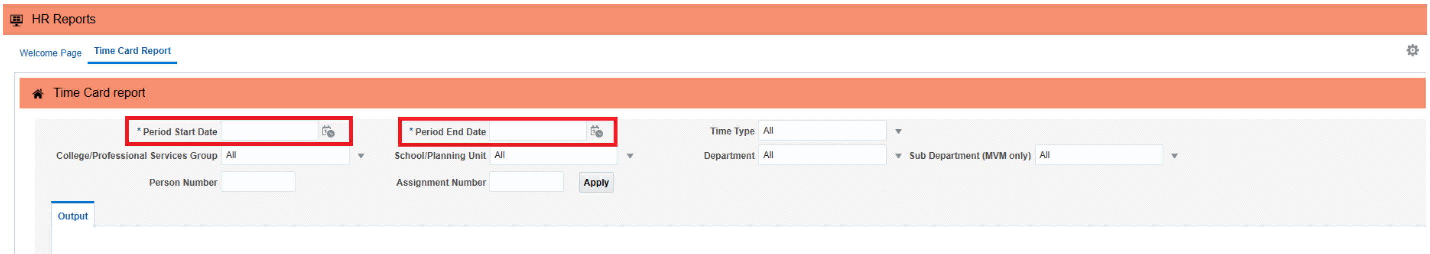
Position Change request within People & Money. Further information on how to do this can be found in the guide '[How to request a new position or position change'](#) (under the heading of Recruitment and Onboarding > Positions). Please note you must continue to seek approval to recruit to positions with vacant FTE.

The [Guide to Job Classifications and Position Management](#) provides some helpful background to positions within People and Money.

Please note that this report may show duplication of position numbers if there is an employee assignment with a suspended status.

Time Card Report

This report lists all the time cards in your area between two dates with details on time type, hourly rate and estimated costs. This report will show time cards that have been approved and submitted. The Time Card report is available to line managers and timekeepers.
As this report is gathering information from a number of areas within People and Money it may take some time to load.



The Time Card report has the following **filters** available:

- **Period Start Date** - Select the 1st day on the month
- **Period End Date -** Select the last day of the month
- **Time Type**
  Note: as this report is gathering information from a number of areas within People and Money it may take some time to load when selecting Time Type > 'All'. Applying a filter to 'Time Type' may improve the time taken to produce results.
- **College/Professional Services Group**
- **School/Planning unit**
- **Department**
- **Sub Department (CMVM only)**
- **Person Number**
- **Assignment Number**

See [Appendix 5](#) for a full list of columns contained in this report.

HR Reports

Welcome Page | Time Card Report

Time Card report

* Period Start Date: 01-02-2025 | * Period End Date: 31-03-2025 | Time Type: GH Hours
College/Professional Services Group: All | School/Planning Unit: All | Department: All | Sub Department (MVM only): All
Person Number: | Assignment Number: | Apply

Output

Period Start Date	Person Number	Assignment Number	First Name	Known As	Last Name	UUN	Primary Flag	College / Professional Services Group	School / Planning unit	Department	Sub Department (CMVM only)	Personal Job Title	Job Name	Worker Category	Person Type	Permission Type	Fund	Fund Description
01/02/2025	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	College of Medicine and Veterinary Medicine	Edinburgh Medical School	Medical Education Unit	Medical Education	[illegible]	[illegible]	Guaranteed Hours	Employee	[illegible]	[illegible]	General Unrestricted Funds
01/03/2025	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	College of Medicine and Veterinary Medicine	Edinburgh Medical School	Medical Education Unit	Medical Education	[illegible]	[illegible]	Guaranteed Hours	Employee	[illegible]	[illegible]	General Unrestricted Funds
01/03/2025	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	College of Medicine and Veterinary Medicine	Edinburgh Medical School	Medical Education Unit	Medical Education	[illegible]	[illegible]	Guaranteed Hours	Employee	[illegible]	[illegible]	General Unrestricted Funds
01/02/2025	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	College of Medicine and Veterinary Medicine	Edinburgh Medical School	Medical Education Unit	Medical Education	[illegible]	[illegible]	Guaranteed Hours	Employee	[illegible]	[illegible]	General Unrestricted Funds
01/03/2025	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Y	College of Medicine and Veterinary Medicine	Edinburgh Medical School	Medical Education Unit	Medical Education	[illegible]	[illegible]	Guaranteed Hours	Employee	[illegible]	[illegible]	General Unrestricted Funds

The example below shows the section of the report that displays Time Card Status, Approved Date, Time Card Work Category, Course Code, Hourly Rate, Alternate Rate, Time Type, Entry Date, Quantity of Hours Claimed, Estimated Costs, Comments:

Time Card Status	Approved Date	Time Card Work Category	Course Code	Grade	Grade Step	Hourly Rate	Alternate Rate	Time Type	Entry Date	Quantity of Hours Calimed	Estimated Cost	Comments
APPROVED	04/02/2025			UE03	UE03 - Step 2	13.09		GH Hours	30/01/2025	6.25	96.55	[illegible]
APPROVED	04/02/2025			UE03	UE03 - Step 2	13.09		GH Hours	13/01/2025	3	46.34	
APPROVED	04/02/2025			UE03	UE03 - Step 2	13.09		GH Hours	30/01/2025	3.5	54.07	
APPROVED	03/02/2025			UE04	UE04 - Step 2	14.43		GH Hours	14/01/2025	2	34.06	

If you select Time Type -> 'GH Hours', the Estimated Costs column will include the 18.1% holiday pay that all guaranteed hours employees are entitled to. The Estimated costs for overtime time types will be the Hourly Rate or Alternate Rate multiplied by the hours claimed multiplied by the overtime rate. E.g. Overtime x 0.5.

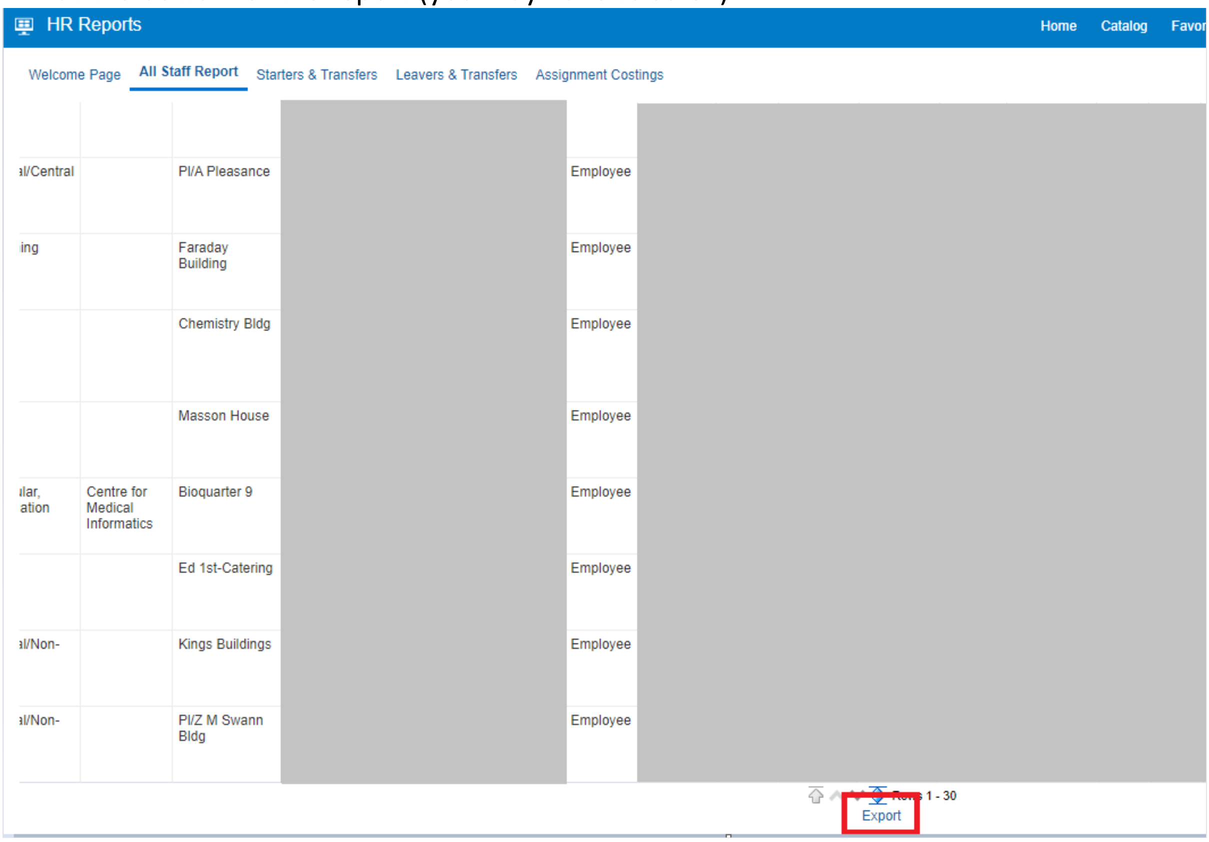
The report will only show costing information, Time Card Work Category, Course Code, Alternate Rate and Comments when this has been entered onto a time card. Costing information is only added where this is different from the normal assignment costing information.

Exporting Reports

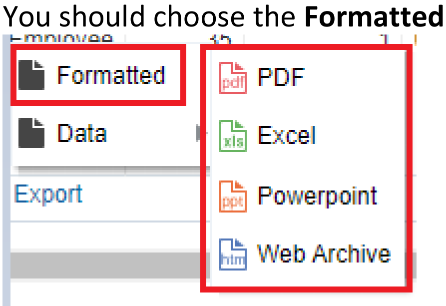
1. **Export the data**
    a. To export the All Staff Report, Starters & Transfers, Leavers & Transfers and Position Incumbents report use the **Export** link and select the **Formatted** option. See Exporting the All Staff, Starters & Transfers, Leavers &Transfers and Position Incumbents reports for more information.
    b. To export the Assignment Levels Costing and Time Card report, select the **View Report** icon. See Exporting the Costing Assignment Report for more detail.

Exporting the All Staff, Starters & Transfers, Leavers & Transfers and Position Incumbents reports

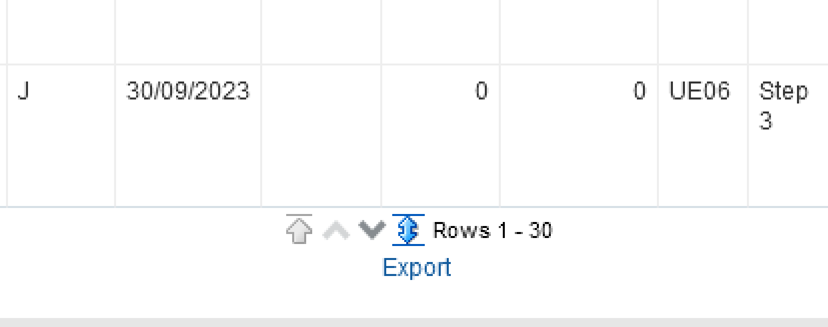
You can export the above reports within the dashboard for further manipulation, by selecting the **Export** link at the bottom of the report (you may have to scroll).



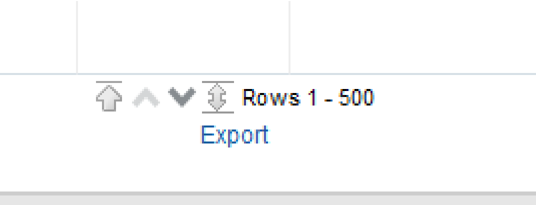
You should choose the **Formatted** option. You will see the options PDF, Excel, Powerpoint and Web Archive:



If you wish to view the data in the report without exporting, you can use the arrows at the bottom to navigate through the results. Initially you will see rows 1-30.



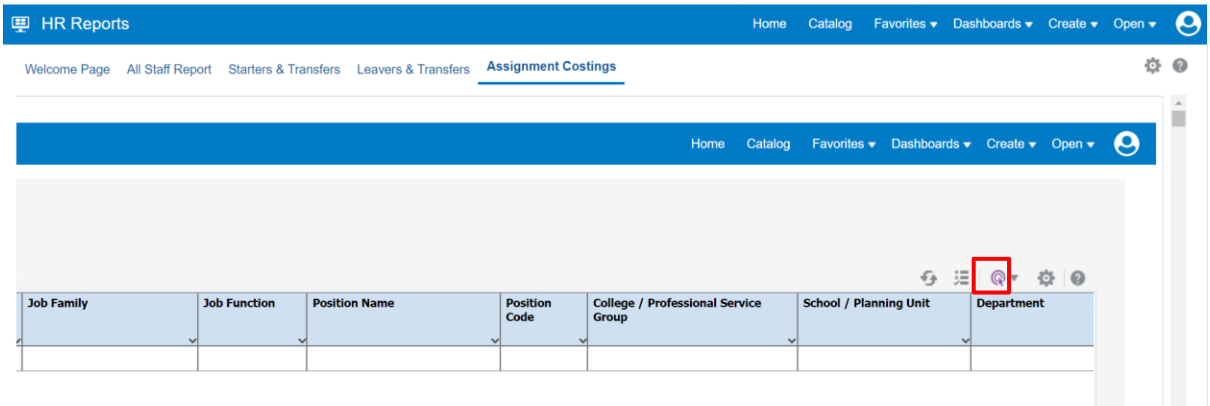
Select the blue arrow to view rows 1-500.



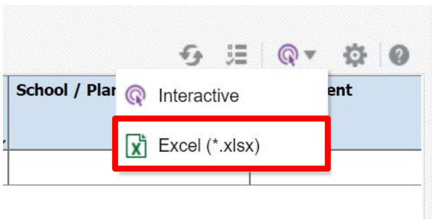
Use the up and down arrows to move up 500 rows or down 500 rows.

Exporting the Costing Assignment and Time Card reports

You can export the Costing Assignment and Time Card report by selecting the **View Report** icon on the right-hand side of the screen **(you may have to scroll to the right of the page).**



To export the data, select the **Excel (*.xlsx)** option from the drop-down menu.



The **Excel (*.xlsx)** version of the report will then download and retain the layout that is displayed in People and Money.

Appendix

Appendix 1 – The All Staff Report

The All Staff Report displays the following information:

Person Number	Assignment Number
First Name	Known As
Last Name	Primary Assignment Flag
Hire Date	College/Professional Service Group
School/Planning Unit	Department
Location Name	Personal Job Title
Worker Category	Assignment Category
Person Type	Contract Type Reason
Contract Type Reason Code	Projected End Date
Contract Review Date	Working Hours
Assignment FTE	Grade
Grade Step	Position Name
Position Code	Job Code
Job Level	Job Family
Job Function	Research/Teaching & Research/Teaching Only Code
Research/Teaching & Research/Teaching Only Description	Line Manager
Work Email	UUN
Assignment Status	Primary Schedule
Clinically Active	MRCVS Qualified
Work Schedule	

Appendix 2 – Starters and Transfers

Starters and Transfers displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	Primary Assignment Flag
Continuous Service Date	Assignment Start Date
Action Effective Start Date	Action Name
Projected Start Date	College/Professional Service Group
School/Planning Unit	Department

Sub Department (MVM Only)	Location
Personal Job Title	Worker Category
Assignment Category	Person Type
Contract Type Reason	Contract Type Reason Code
Projected End Date	Contract Review Date
Working Hours	Assignment FTE
Grade	Grade Step
Position Name	Position Code
Job Code	Job Level
Job Name	Job Family
Job Function	Line Manager
Work Email	UUN
Assignment Status	Starter/Transfer Ind
Internal Candidate (Yes/No)	

Appendix 3 – Leavers & Transfers

Leavers & Transfers displays the following information:

Person Number	Assignment Number
First Name	Preferred Name
Last Name	Primary Assignment Flag
Continuous Service Date	College/Professional Service Group
School/Planning Unit	Department
Location	Personal Job Title
Worker Category	Assignment Category
Person Type	Contract Type Reason Code
Contract Type Reason	Projected End Date
Contract Review Date	Working Hours
Assignment FTE	Grade
Grade Step	Position Name
Position Code	Job Code
Job Level	Job Name
Job Family	Job Function
Line Manager	Work Email

UUN	Assignment Status
Transfer Code	Transfer Description
Transfer Date	Leaver/Transfer Ind
Termination Reason For Leaving Desc (university)	Actual Termination Date
HESA Reason for end of contract	HESA Activity After Leaving
HESA Destination After Leaving	

Appendix 4 – Assignment Level Costing

Assignment Level Costing displays the following information:

EE No	Title
First Name	Last Name
Email Address	Assignment Number
Hire Date	Projected End Date
Contract Review Date	Assignment FTE
Assignment Costing Effective Date	Grade
Grade Step	Primary Assignment Flag
Assignment Status	Personal Job Title
Person Type	Worker Category
Assignment Category	Job Family
Job Function	Position Name
Position Code	College/Professional Service Group
School/Planning Unit	Department
Sub Dept (MVM only)	Costing Segments 1 (Entity)
Costing Segments 2 (Fund)	Costing Segments 3 (Cost Centre)
Costing Segments 4 (Account)	Costing Segments 5 (Analysis)
Costing Segments 6 (Portfolio)	Costing Segments 7 (Product)
Costing Segments 8 (Intercompany)	Costing Segments 9 (Spare 01)
Costing Segments 10 (Spare 02)	Proportion

Appendix 5 – Time Card Report

Time Card report displays the following information:

Period Start Date	Person Number
Assignment Number	First Name
Known As	Last Name
UUN	Primary Flag
College/Professional Service Group	School/Planning Unit
Department	Sub Dept (MVM only)
Personal Job Title	Job Name
Worker Category	Person Type
Permission Type	Fund
Fund Description	Cost Centre
Cost Centre Description	Analysis
Analysis Description	Portfolio
Portfolio Description	Time Card Status
Approved Date	Time Card Work Category
Course Code	Grade
Grade Step	Hourly Rate
Alternate Rate	Time Type
Entry Date	Quantity of Hours Claimed
Estimated Cost	Comments

Version History

Version	Date	Description	Approved By
3.0	October 2024	• Old format	ME
4.0	10 July 2025	• Transferred to new format • Added section for Time Card Report • Updated screenshots • Review and updates of columns in appendices	ME
4.1	11 August 2026	• Updated for fixed term contract project	RM

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.