THE UNIVERSITY of EDINBURGH

People and Money system

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Line Manager/ School Department Administrator – How to view Annual leave dashboard

Line Manager/ School Department administrator

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 line managers access the Annual Leave dashboard app to view the Annual leave calendar report and Accrual (Annual leave balance) reports. The guide also details how School/ Department administrators can view the same information for an individual in your area of responsibility.

The Guide to Annual Leave and the Guide to Work Schedules can be found in the relevant sections of the People and Money User guides

In Brief…

This is a simple overview of the process.

1. If you are a Line Manager click on '**My Team'** and select the '**Annual leave Dashboard'** app
2. Select the correct tab – Annual leave Calendar report; Accrual (Annual leave balance); to review the information for your direct and indirect reports. If you also have SDA access you will be able to view information for all employees in your area of responsibility.
3. Use the filters to select the required information.
4. Use the date fields to select the required time period.

This is a simple overview of the process.

1. If you are a School Department Administrator click on '**My Client Group'** and select the '**Annual leave Dashboard'** app
2. Select the correct tab – Annual leave Calendar report; Accrual (Annual leave balance); to review the information for all employees in your area of responsibility.
3. Use the filters to select the required information.
4. Use the date fields to select the required time period.

For detailed guidance, see the next section.

In Detail…

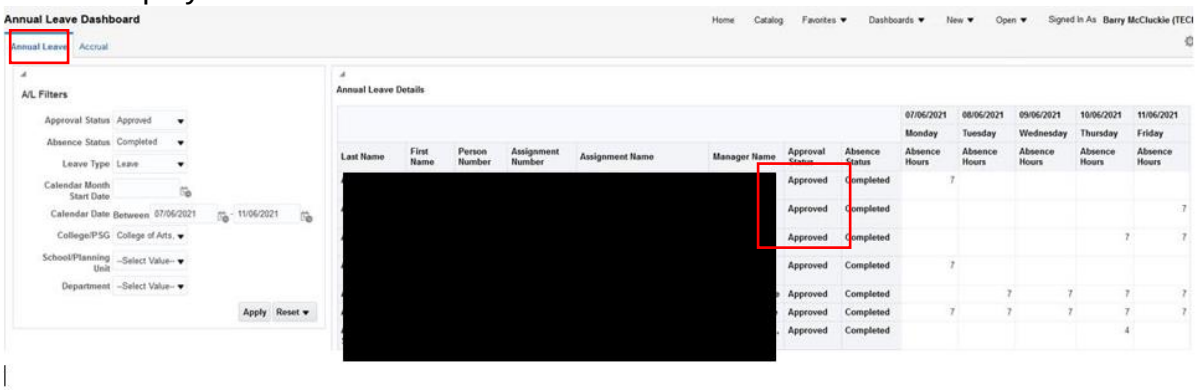
1. Line managers can access the line manager dashboard by clicking on '**My Team'** and selecting the '**Annual Leave dashboard'** app. 

The 'Annual Leave 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. School Department Administrator click on '**My Client Group'** and select the '**Annual leave Dashboard'** app 

If you are a School/Department Administrator then you will be able to bring back data for your Area of Responsibility.

3. If you selected the 'Department calendar report' tab, the following information will be displayed.



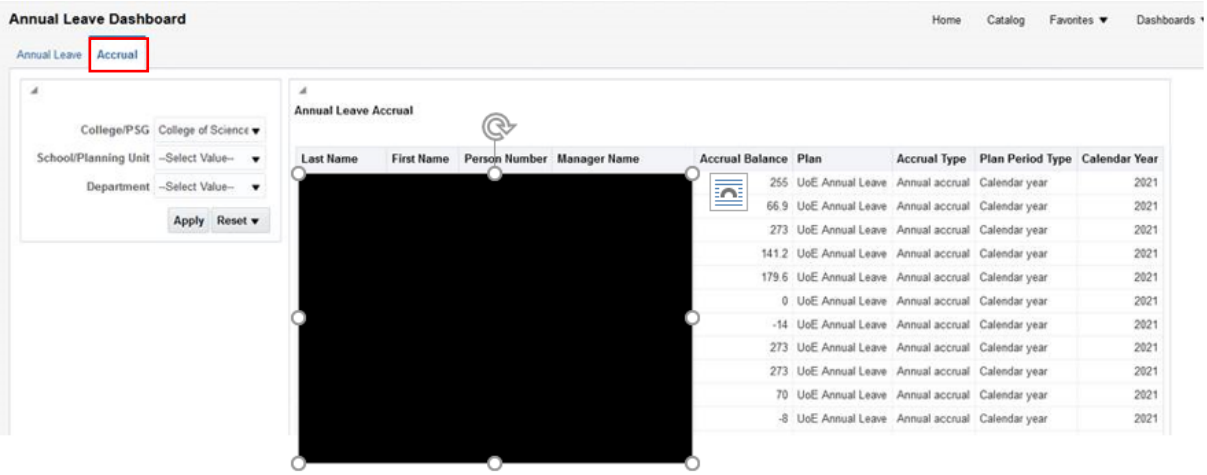
The report has a number of filters available:

- College/ Professional Service area
- School/Dept
- Approval Status
- Absence Status
- Leave Type

- Calendar Month start date – select the 1st of the month to pull whole month report
- Calendar date between – select to pull report for a set period

Please note: terminated employees will not show on either report (if the termination date is prior than the system date the employee will not show).

4. If you selected the 'Accrual' tab, this shows the annual leave balance to the end of the leave year the following information will be displayed.

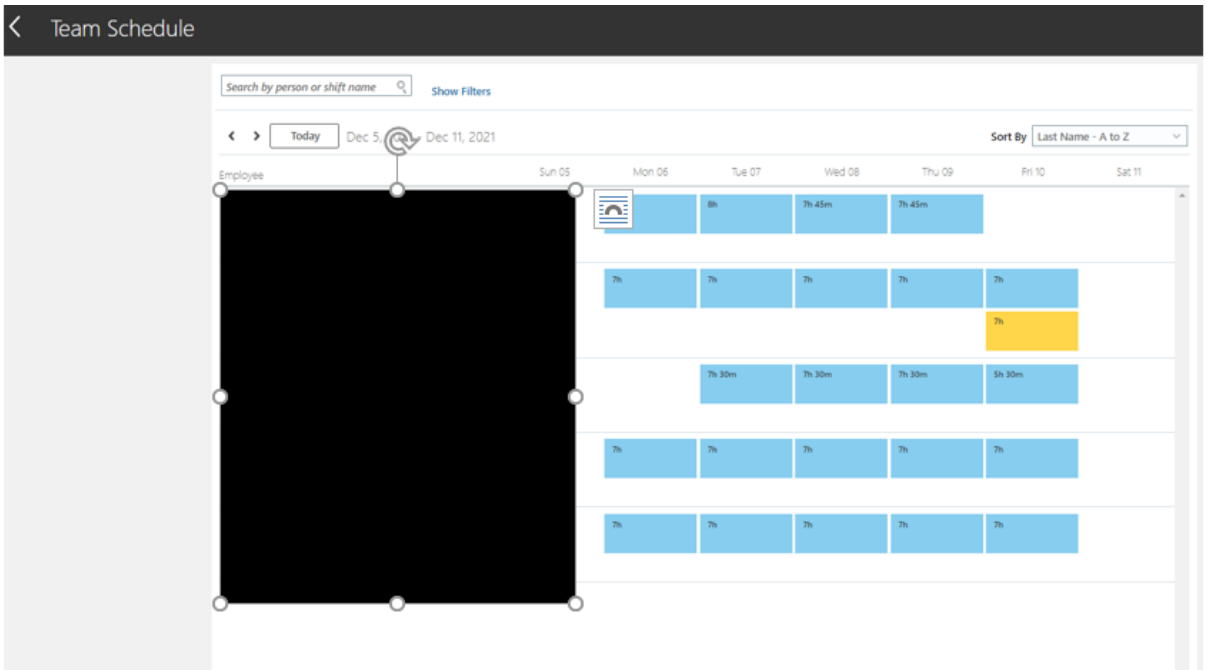


5. The annual leave balance is made up of the Accrual (annual leave entitlement including Public holidays) any carry over for the previous year minus all leave approved or taken.

6. You can export the report for further manipulation. The option to export is held at the bottom of the report.

7. If the annual balance is incorrect, please check the employee has booked all their leave including public holidays and closure days.

8. Check their work schedule for their assignment is correct. Employees and Line managers can check this through the Team Schedule found on the Home page. (Employees on the Me tab, and Line managers on the My Team tab). The blue boxes show the days scheduled to work and the hours in each box show the hour scheduled each day. The yellow boxes show where annual leave has been booked.



9. If this is blank or incorrect then this can be corrected by raising the appropriate Service Request. To support this process we have launched a [Work Schedule Change Form (No Hours Change)](). This will help users provide all the required details needed for HR Services to update People and Money. This form should be used for requesting a change to work schedule when the contractual working hours is not changing. The form should be attached to the Service Request >Interim Form>Work Schedule change (no hours change) prior to submitting. You should continue to use the Outcome of Contract review Form (OCR) to request a change to contractual working hours.

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.