People and Money system

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**Line Manager/Senior Manager/School Department Administrator – How to view HR Reports dashboard**

Line Manager/Senior Manager/School Department administrator

Estimated time to complete: 5 minutes

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 and School/Department Administrators (SDAs) can access the HR Reports dashboard app on People and Money to view the All Staff Report, and the Starters and Transfers report.

- **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

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 is a simple overview of the process for **Line Managers**:

1. Click on My Team
2. Select the HR Reports app
3. Select the relevant tab – All Staff Report or Starters and Transfers – 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 via My Client Groups.
4. Use the filters to select the required information.
5. Click Apply to view filtered results
6. Export the data if required using the Export link

This is a simple overview of the process for those with a Senior Manager role:

1. Click on My Client Groups
2. Select the HR Reports app
3. Select the relevant tab – All Staff Report or Starters and Transfers – to review the information for all employees in your area of responsibility.
4. Use the filters to select the required information.
5. Click Apply to view filtered results
6. Export the data if required using the Export link

This is a simple overview of the process for SDAs:

1. Click on My Client Groups
2. Select the HR Reports app
3. Select the relevant tab – All Staff Report or Starters and Transfers – to review the information for all employees in your area of responsibility.
4. Use the filters to select the required information.
5. Click Apply to view filtered results
6. Export the data if required using the Export link

For detailed guidance, see the next section.

In Detail…

1. From the Home page:
   - Click on My Team if you are a line manager
• Click on **My Client Groups** if you are a Senior Manager or SDA:

2. Click the **HR Reports** tile.

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

If you are a School/Department Administrator 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.

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 will vary according to each user’s security access.

3. **Select the relevant tab** – All Staff Report or Starters and Transfers:

4. Use the **optional filters** to select the required information.
5. 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.

6. **Export the data** if required using the **Export** link. See the section on **Exporting** for more detail.

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

**All Staff Report**

The All Staff Report displays the following information. (See Appendix 1 for full list of columns)
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; Veterinary Clinical; Professional, Administration and Operational; Technical
- **College/ Professional Service Group**
- **School/Planning Unit**
- **Department**
- **Sub Department** (input only for MVM College)

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.

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.

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 and Transfers

The Starters and Transfers report displays all new starters and transfers with an effective start date between two dates. (See Appendix 2 for full list of columns)

Starters and Transfers has the following filters available:

- Effective Start Date Between [date1] and [date2]
- Type (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 (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.

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
You can export the report for further manipulation, by selecting the Export link at the bottom of the report (you may have to scroll).
If you choose to export the **Formatted** report you will see the options PDF, Excel, Powerpoint and Web Archive:

![Export options](image)

The **formatted** version retains the layout that is displayed and takes slightly longer to download.

If you choose to export only the **data** you will see the options Excel, CSV, Tab Delimited or XML:

![Export options](image)

The data option downloads quicker but has no formatting and may display slightly differently, for example columns may show in a different order.
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.

<table>
<thead>
<tr>
<th>J</th>
<th>30/09/2023</th>
<th>0</th>
<th>0</th>
<th>UE06</th>
<th>Step 3</th>
</tr>
</thead>
</table>

Select the blue arrow to view rows 1-500.

Select the blue arrow to view rows 1-500.

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

*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.*
Appendix 1: 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
- Sub Dept (MVM only)
- Location Name
- Personal Job Title
- Worker Category
- Assignment Category
- Person Type
- Fixed Term reason
- Fixed Term 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
- Line Manager
- Work Email
- UUN
- Assignment Status
- Primary schedule
- Work schedule (primary assignment only)
Appendix 2: 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
- College / Professional Service Group
- School / Planning Unit
- Department
- Sub Department (MVM Only)
- Location
- Personal Job Title
- Worker Category
- Assignment Category
- Person Type
- Fixed Term Reason Code
- Fixed Term Reason Code Description
- 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
- Action Code
- Action Name
- Starter/Transfer Ind
- Internal Candidate