THE UNIVERSITY of EDINBURGH

People and Money system

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

Line Manager/Senior Manager/School Department administrator

Estimated time to complete: 7 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 app on People and Money to view the All Staff Report, Starters and Transfers, Leavers and Transfers, Assignment Costing reports.

- **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.

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

1. Click on **My Team**
2. Select the **HR Reports** app and a new tab will open on your browser.
3. Select the relevant tab – All Staff Report, Starters and Transfers, Leavers and Transfers or Assignment Costings – 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.

4. 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.
5. Click **Apply** to view filtered results
6. Export the data if required using the **Export** link (or the View Report icon within the Assignment Costings Report)

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, Starters and Transfers, Leavers and Transfers or Assignment costings– to review the information for all employees in your area of responsibility, except yourself.
4. 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.
5. Click **Apply** to view filtered results
6. Export the data if required using the **Export** link (or the View Report icon within the Assignment Costings Report)

This is a simple overview of the process for **SDAs**:

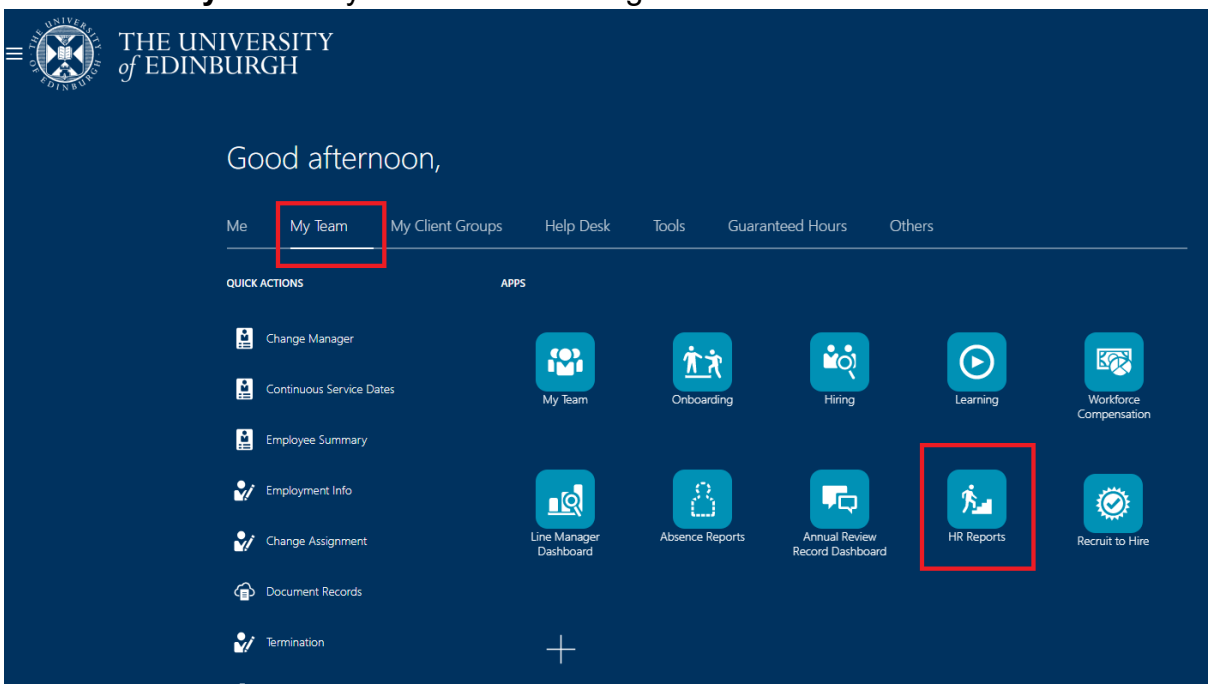
1. Click on **My Client Groups**
2. Select the **HR Reports** app
3. Select the relevant tab – All Staff Report, Starters and Transfers, Leavers and Transfers or Assignment costings – to review the information for all employees in your area of responsibility, except yourself.
   Use the filters to select the required information. Note: when moving onto other Reports within the HR Reports Dashboard, filters should be **Reset** before running another Report.
4. Click **Apply** to view filtered results
5. Export the data if required using the **Export** link (or the View Report icon within the Assignment Costings Report)

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.

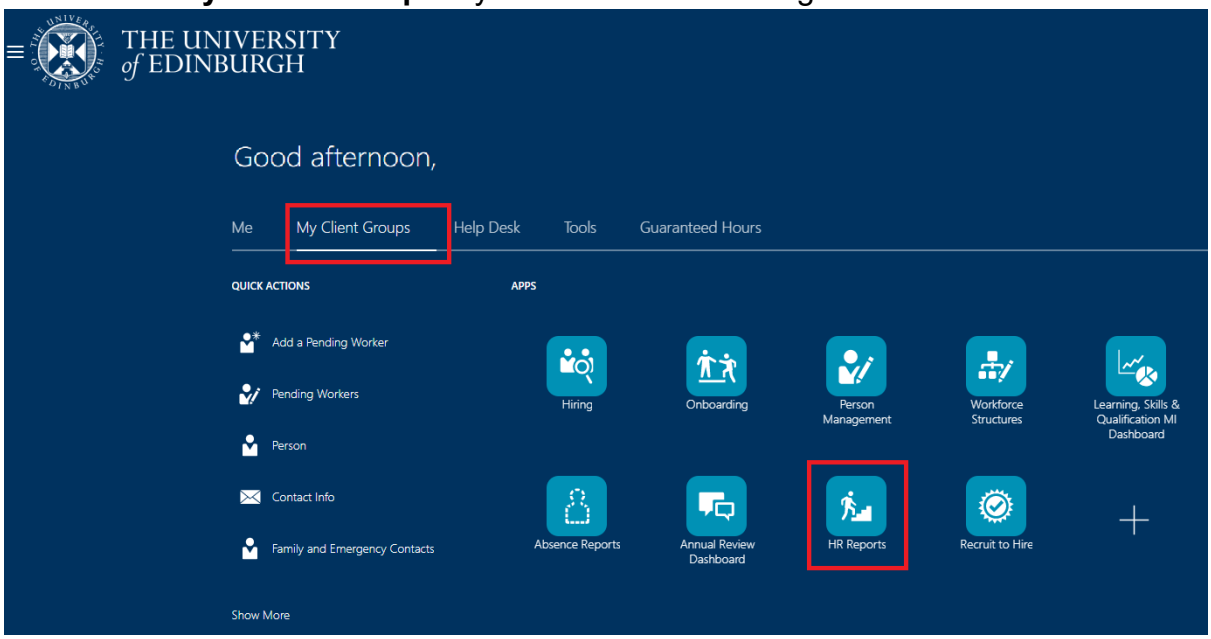
For detailed guidance, see the next section.

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.

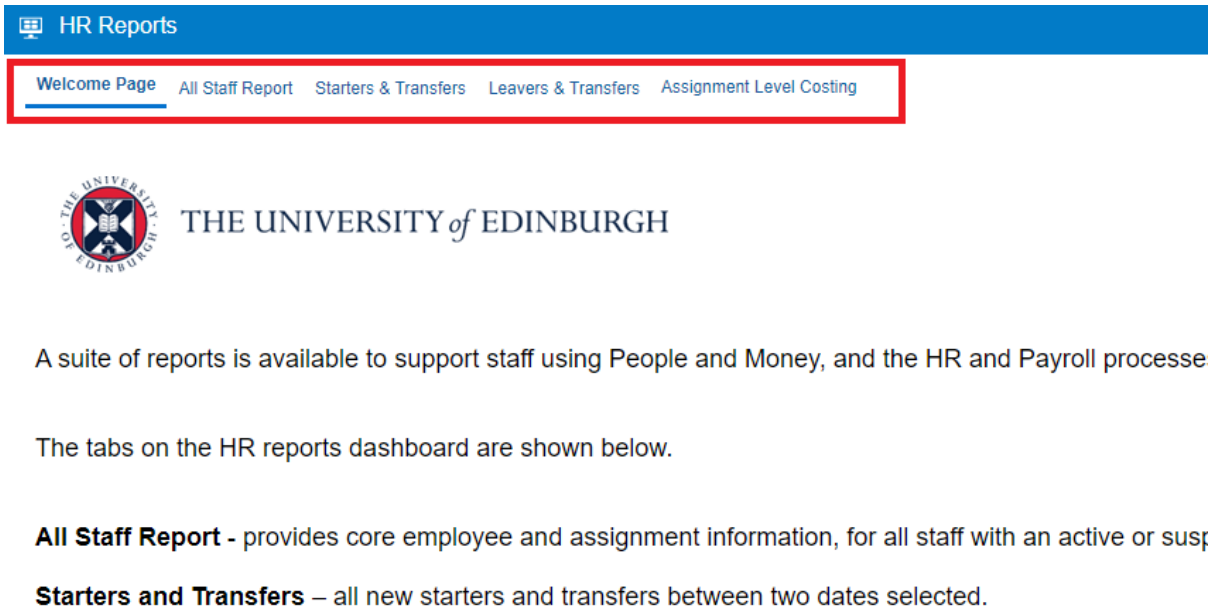
The HR Reports Dashboard returns real time data for a line manager's direct and indirect reports.

If you are a School/Department Administrator 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.

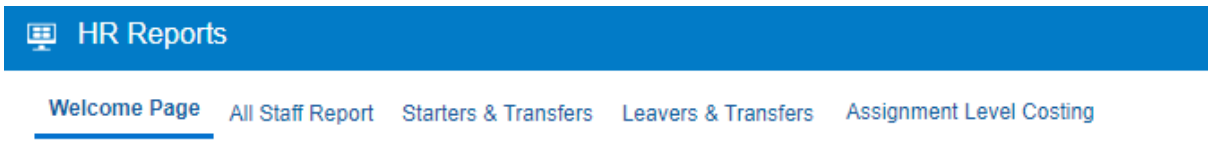
Note: the person running the report will not appear in the results.

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.

3. **Select the relevant tab** – All Staff Report, Starters & Transfers, Leavers & Transfers or Assignment Level Costing:



4. 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.
5. Click **Apply** to view filtered results.

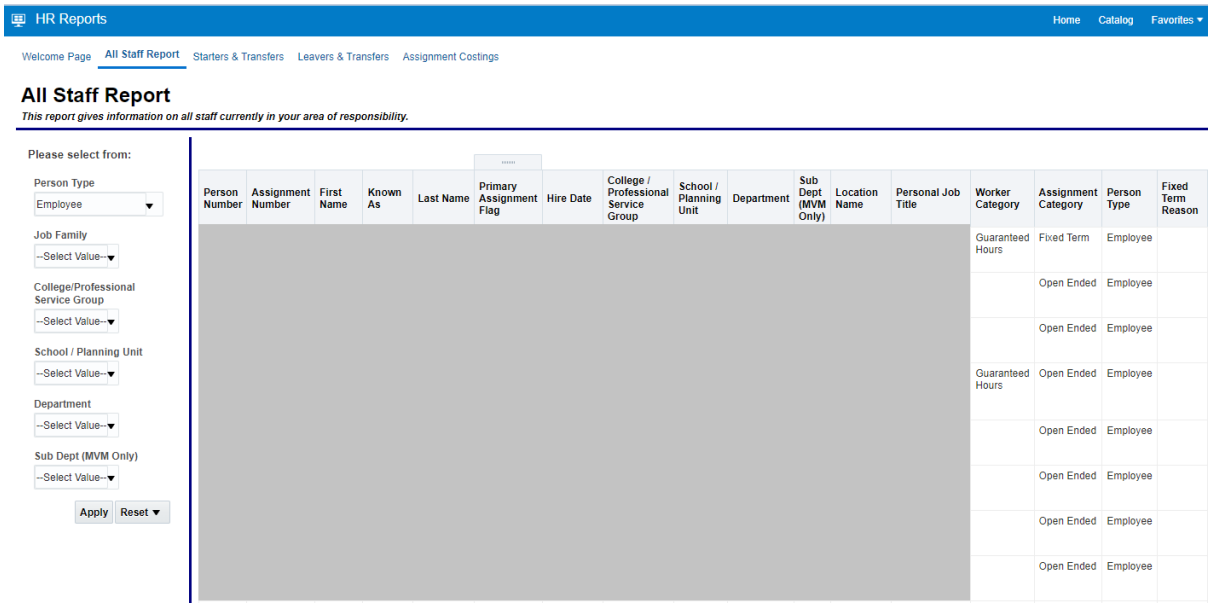
If there are no results to display, either because you have chosen filters that are too restrictive, or because there is no matching data within your area of responsibility, you will see an onscreen message *'No Results: The specified criteria didn't result in any data. This is often caused by applying 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** of the All Staff Report, Starters & Transfers and Leavers & Transfers report if required using the **Export** link and selecting the Formatted option. To export the Assignment Levels Costing report, select the **View Report** icon. 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, 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)

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.

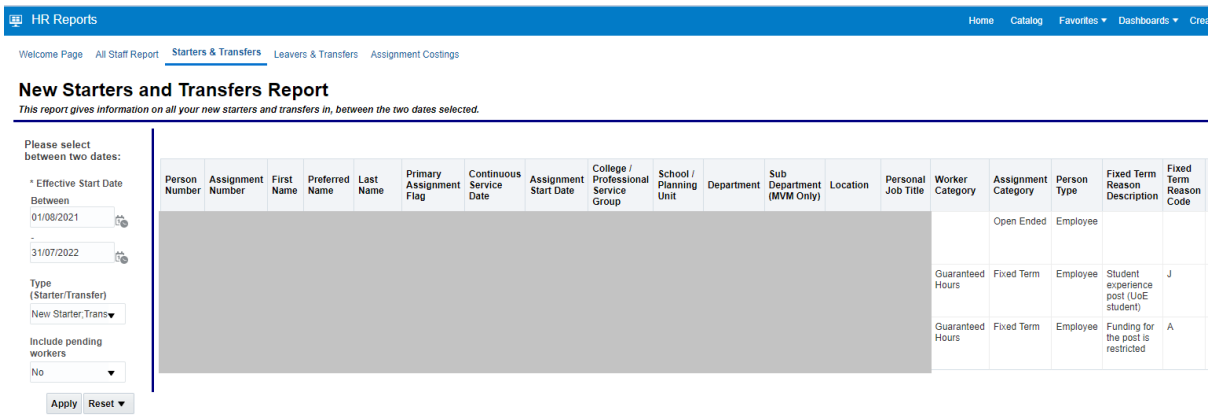
Employees who have a future termination in People and Money will continue to show on the report until their termination date has passed and their assignment becomes inactive.

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 full list of columns)

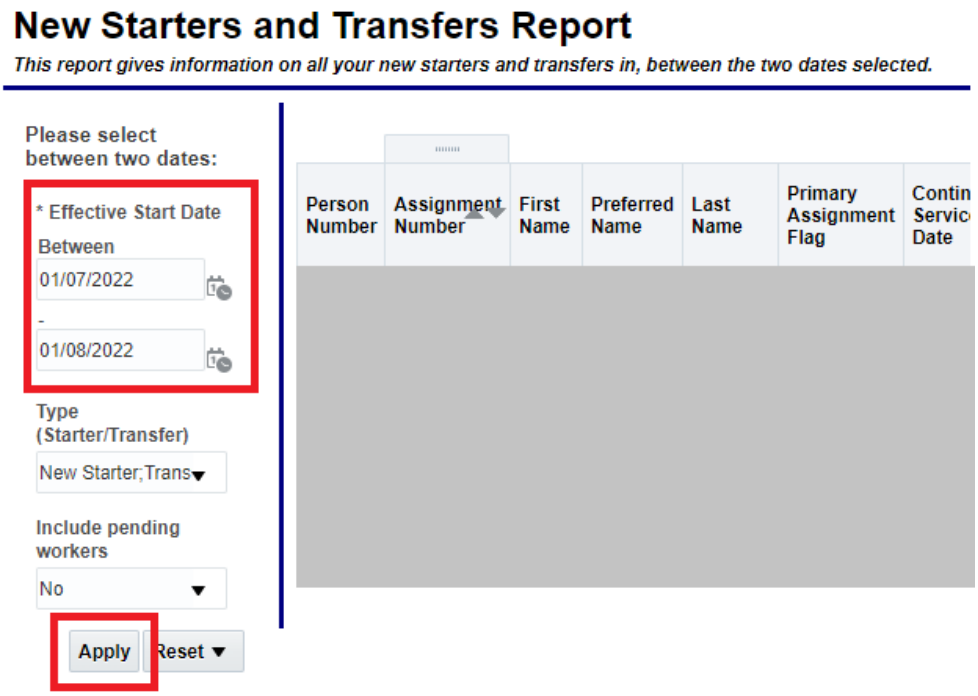


Starters & Transfers has the following filters available:

- 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.

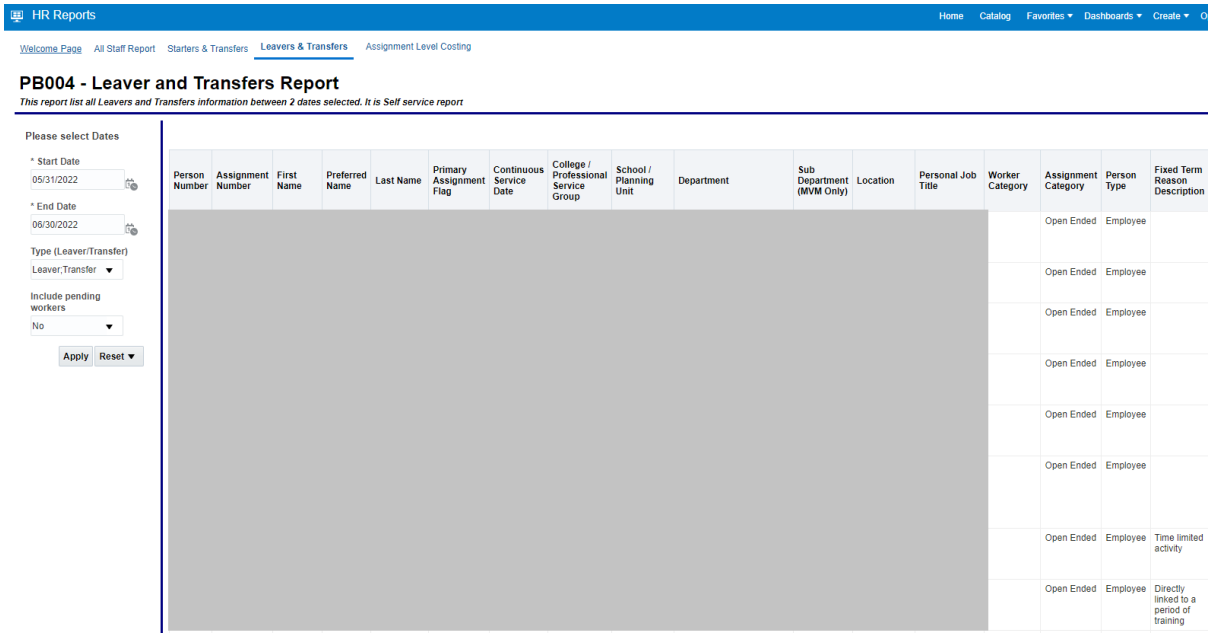
The dates default to show starters and transfers that have occurred within the previous 30 days. These can be altered by using the 'Select Date' button or by typing a date into the field in the format DD/MM/YYYY and clicking **Apply** to view the results.



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. 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 full list of columns)



Leavers & Transfers has the following filters available:

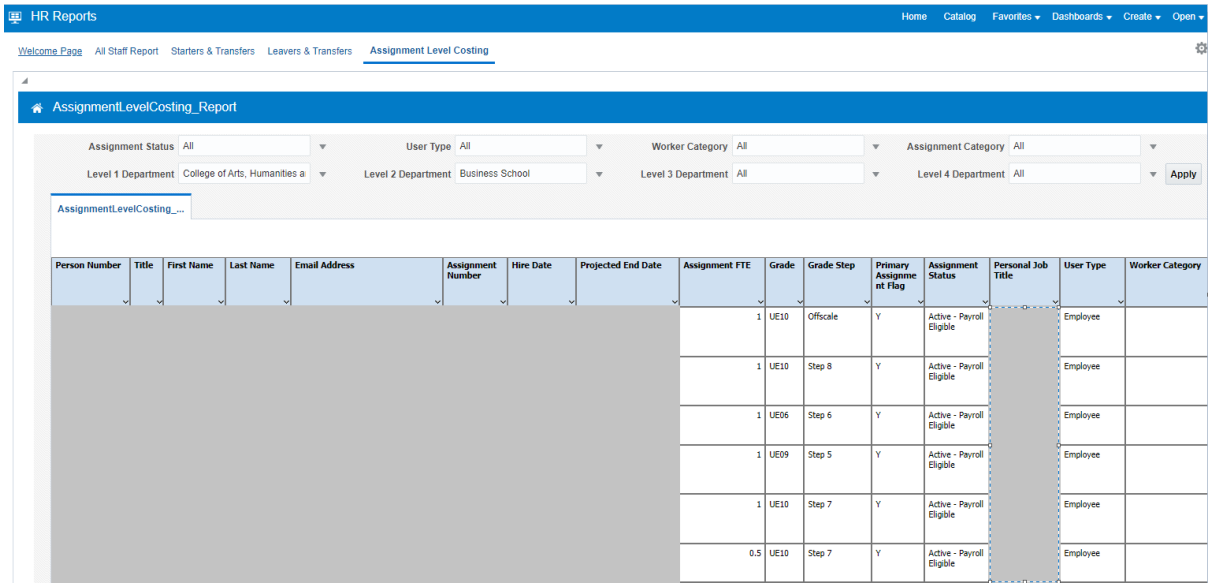
- Effective Start Date Between [date1] and [date2]
- Type (Leaver/Transfer)
- Include pending workers*

*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.

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 that when an employee has more than one source of funding, the report will display a row for each source.



Assignment Level Costing has the following filters available:

Assignment Status

User Type

Worker Category

Assignment Category

Level 1 Department

Level 2 Department

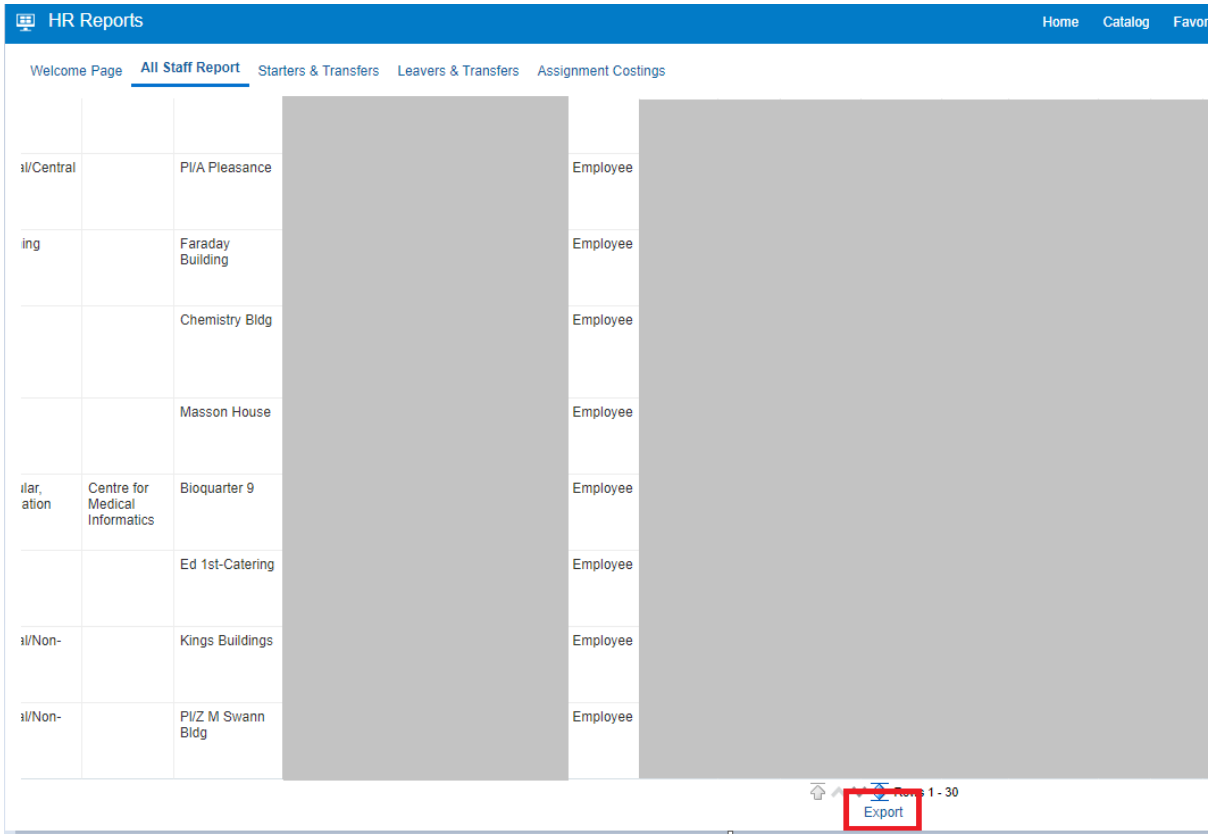
Level 3 Department

Level 4 Department

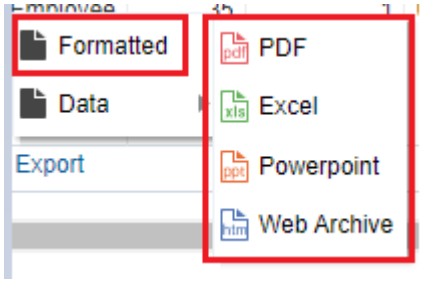
See Appendix 4 for full list of columns contained in the report.

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

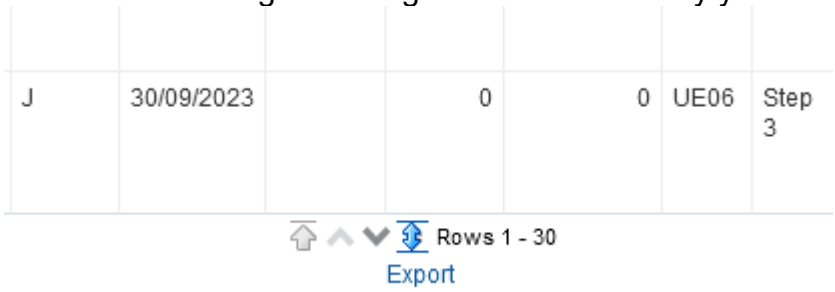
You can export the All Staff, Starters & Transfers and Leavers & Transfers reports for further manipulation, by selecting the **Export** link at the bottom of the report (you may have to scroll).



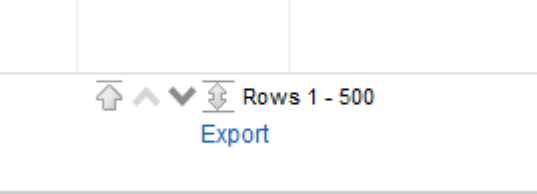
You should choose the **Formatted** option. You will see the options PDF, Excel, Powerpoint and Web Archive:



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.



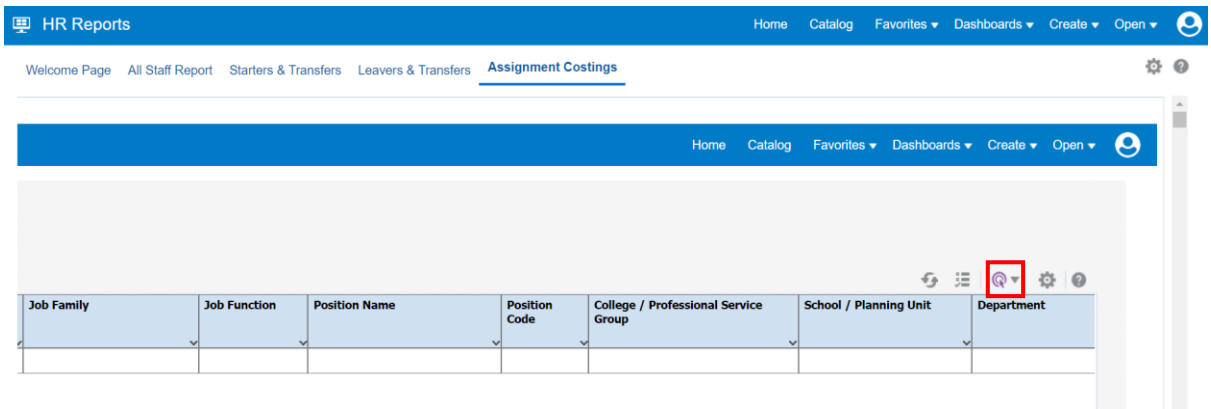
Select the blue arrow to view rows 1-500.



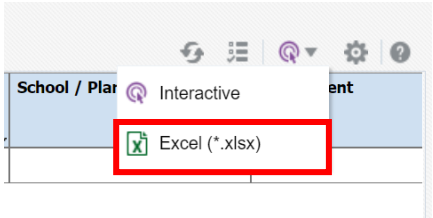
Use the up and down arrows to move up 500 rows or down 500 rows.

Exporting the Costing Assignment Report

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



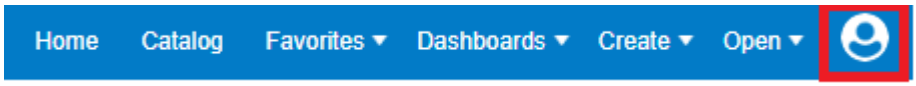
To export the data, select the **Excel (*.xlsx)** option from the drop down menu.



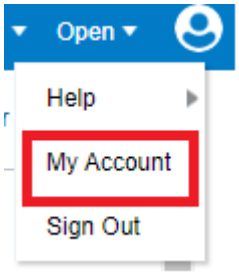
The **Excel (*.xlsx)** version of the report will then download and retain the layout that is displayed in People and Money.

Date Format

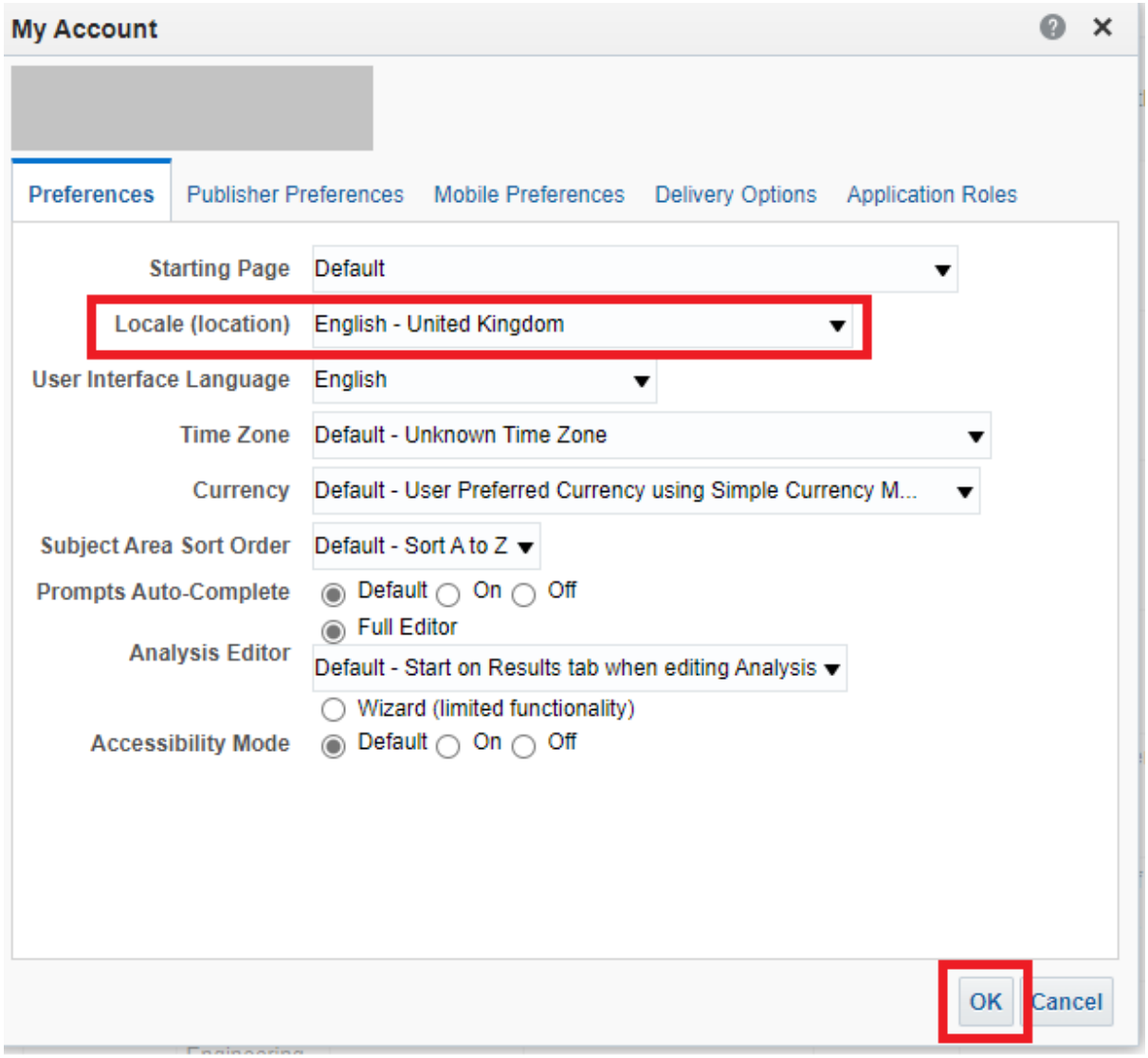
Depending on your settings, you may notice date formats displayed as MM/DD/YYYY. This can be changed to DD/MM/YYYY via the My Profile screen. Click on the person icon in the top right corner:



Choose **My Account**



In the pop up window that follows, 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.

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

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

Appendix 3: 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
- Sub Department (MVM Only)
- Location
- Personal Job Title
- Worker Category
- Assignment Category
- Person Type
- Fixed Term Reason Description
- Fixed Term Reason Code
- 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
- Leaver/Transfer Ind
- Actual Termination Date
- Termination Reason For Leaving Desc (university)
- Termination Reason For Leaving Code (university)
- Termination Category
- HESA Activity After Leaving
- HESA Destination After Leaving
- HESA Reason for end of contract

Appendix 4: Assignment Level Costing displays the following information:

- Person Number
- Title
- First Name
- Last Name

- Email Address
- Assignment Number
- Hire Date
- Projected End Date
- Assignment FTE
- Grade
- Grade Step
- Primary Assignment Flag
- Assignment Status
- Personal Job Title
- User Type
- Worker Category
- Assignment Category
- Job Family Code
- Job Function Code
- Job Name
- College / Professional Service Group
- School / Planning Unit
- Department
- 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)
- Percentage