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## Introduction

This guide details how to access and use the MyView reports available to you as a manager. Access to these reports will provide you with direct access to the key HR data you need to manager your team. Data in these reports comes straight from the HR and Payroll System (ResourceLink) and is live data. If the reports contain data that is different from what you are expecting contact [HRSystems@rhul.ac.uk](mailto:HRSystems@rhul.ac.uk) who will investigate.

The post to post reporting hierarchy in ResourceLink is used to determine the data seen in the reports. The data included in the report is specific to you as a manager and only includes people that report to you directly or indirectly. Where you sit in the organisational hierarchy will determine what data appears on your report. For example, a Head of School will see data for their whole school whilst a Team managers will see data just for their own team.

## Data classification

In line with the Information Classification Policy the data within these report is classified as 'Confidential'. This means that the data / information is open to groups of authorised people within Royal Holloway. The 'Confidential' data / information category includes data / information defined as Personal Data (Personally Identifiable information) by UK GDPR and the Data Protection Act 2018, such as names, email addresses, phone numbers, and photographs. For further information refer to the College Information Classification Policy.

## GDPR Responsibilities

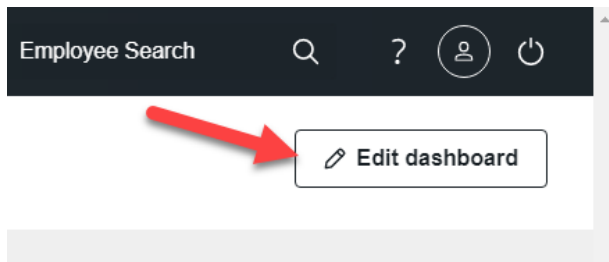
The data included in these reports includes Personal details and is subject to UK GDPR and the Data Protection Act 2018. Ensure that you do not store business critical data directly on your laptop, PC, phone or tablet. Use a secure shared network drive if possible. Ideally file sharing should be done via your College Microsoft 365 account (via Sharepoint) and if you must email the reports to a colleague make sure the file is encrypted and password protected.

It's extremely important and a legal requirement that all staff are equipped with a general knowledge of data protection principles and embed them within their working practices. It is therefore essential that all colleagues across the College, even those who are working remotely, complete the Data Protection Essentials course on Moodle.

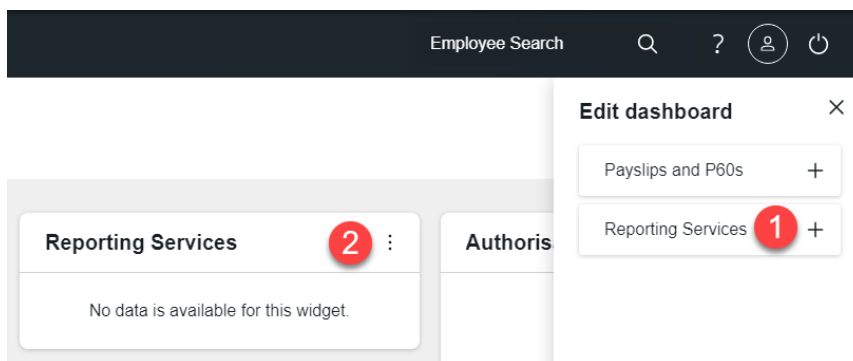
## Add Reporting Services widget to your Dashboard

If you do not have the Reporting Services widget you will need to add this. If you already have this enabled, skip the next step.

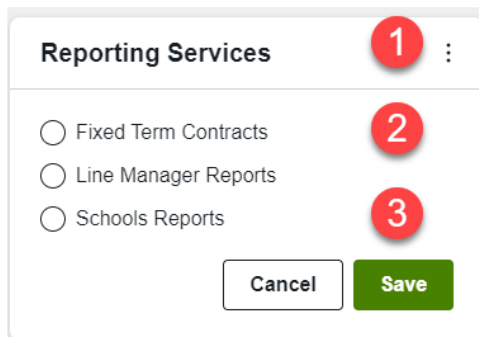
1. Click the **Edit Dashoard** icon in the top right of your screen and then click the + button next to **Reporting Services**. You will have the option of adding a variety of dashboard widgets.



2. Select **Reporting Services** from the list of widgets. The Reporting Services widget will then appear on your Dashboard.



3. On the **Reporting Services** widget select the three dots at the top right. A list of the reporting widgets available will appear. Select the report that you want to access.

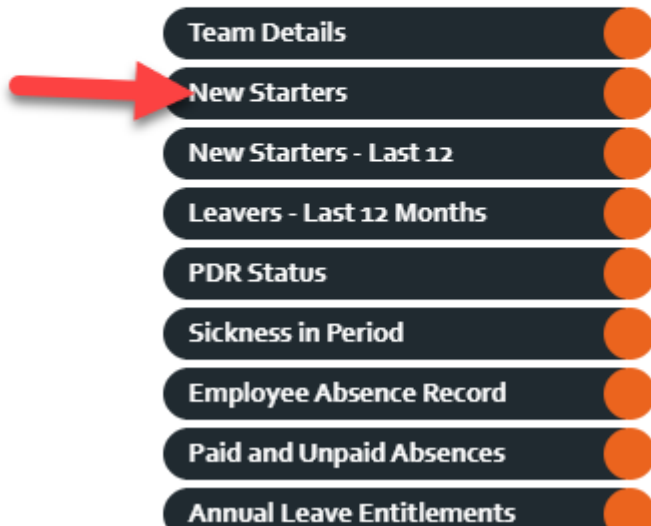


4. Repeat these steps 1-3 for each of the report widgets you would like to access.
5. The Line Manager report widget will look like this. Click on the report name to run the report.

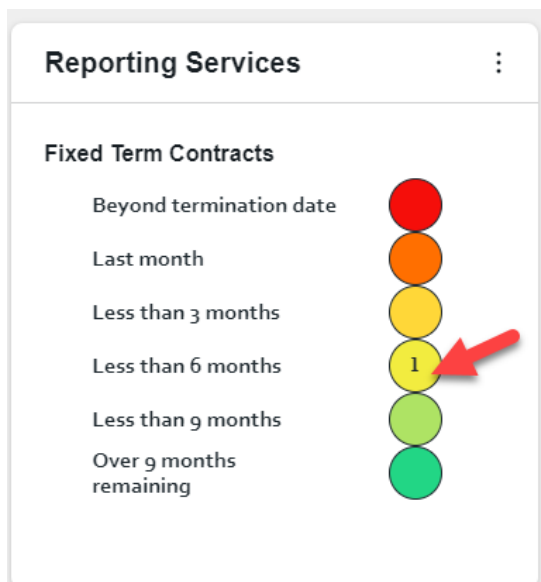
## Reporting Services



### Line Manager Reports



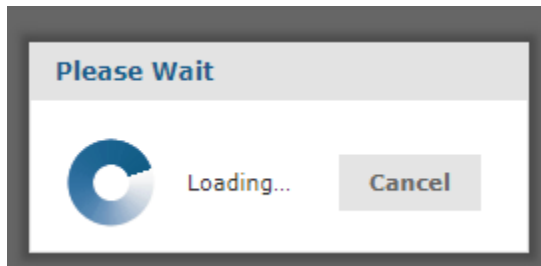
- The Fixed Term Contract End reports widget will look like this. Click on the number to run the report.



### Running the reports

To run the reports click on the respective grey button on the widget. The report will show as Loading for a few seconds / minutes and the report will open in a new browser tab.

**NOTE:** The reports access the main ResourceLink database and the queries they are running are complex it can sometimes take a couple of minutes for the report to run and return the results. As the report open a new tab in your browser should be able to continue with other tasks whilst the report loads.



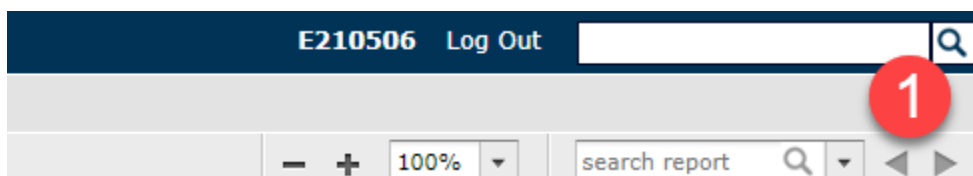
If there is no data for your line reports the report will display as being empty.

#### **New Starters (Man)**

The report is empty.

### **Viewing the report details**

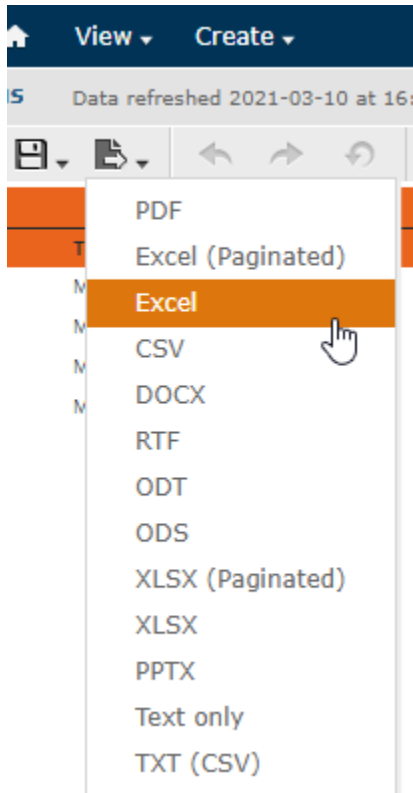
If you want to quickly check a few details then it is possible to view the reports details in the browser. Type the name in the search report area to find the individual you are looking for. You can also change the font size by increasing the % and + and – sign.



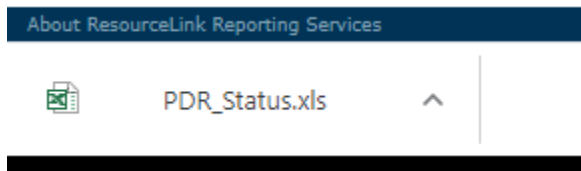
### **Using the report**

1. The widget on your dashboard will appear after you have saved it and should click on the required report to run it.
2. This will then open a new window and you will be presented with the data from that report. These reports are linked to your post, and therefore only show data for individuals who report to you, either directly or indirectly.
3. Saving copies of the report is possible, but you are reminded to consider the GDPR impact of doing so.
4. To save a copy of the report hover over the export icon and then click '**As Excel**':

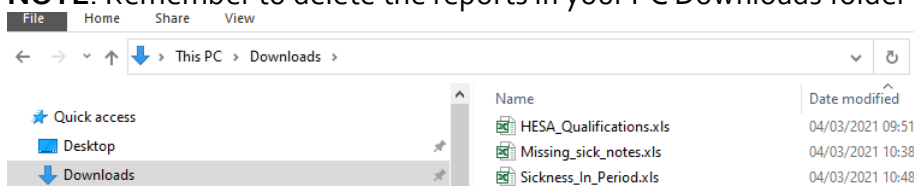
**NOTE:** If you do choose to download the report ensure that you take extreme care in where you download and save the file.



- The report will download to the Downloads folder of your PC and appear at the bottom left of your screen. Click on the downloaded report to open it.



**NOTE:** Remember to delete the reports in your PC Downloads folder on a regular basis.



**NOTE:** To add a filter to the report, you must delete the top title row in the spreadsheet first.

## Line Manager Reports

### Team details

This report includes the post holding details of the individuals within your team. The report contains the key contract information for your team including: Current Start Date, Leave

Date (where appropriate), Details for their Main Post plus any additional posts held. Dates when they started in the post, Post Number (this is useful for Stonefish requests), Contracted Hours, Weeks per year, Grade, Spine Point and Work Pattern information.

### **New Starters – Last 30 days**

This report includes the details of any new starters that have joined your team in the last 30 days and can be used to check basic details about new starters to your team such as their Post Number, Post Title, Grade and Spine Point. The Post Start Date and End Date is also included for reference.

Multiple records for an individual will appear on the report if they have more than 1 post with the College. The Main Post field will have 'Y' if it is a main post and 'N' in the record if it is not the main post.

### **New Starters – Last 12 months**

This reports includes the details of new starters that have joined your team in the last 12 months. It can be used to check basic details for a new starters such as their Post Number, Post Title, Grade and Spine Point. The Post Start Date and End Date is also included for reference.

Multiple records for an individual will appear on the report if they have more than 1 post with the College. The Main Post field will have 'Y' if it is a main post and 'N' in the record if it is not the main post.

### **Leavers – Last 12 months**

This reports includes the details of anyone that has the College from your team in the last 12 months. The report also includes anyone with an End Date in the future. This report can be used to check basic details such as the Post Number, Post Title, Grade and Spine Point. The Post Start Date and Leave Date is also included for reference.

### **PDR Status**

This report includes the Performance Development Review status for each person in your team. The reports includes **Probation Date**, **PDR Year** and **Status** of PDR. If you filter on the **Status** field, this will enable you to see who has and has not completed their PDR in the current year. The **Reviewers name** will default the Reviewer in the previous year. To update this data the line manager should log in and make the change via MyView. **NOTE:** If the meeting dates is 01 June YYYY this is the default date and needs to be updated.

### **Paid and Unpaid absence**

This reports include the details of anyone in your team that has had a period of **Paid** or **Unpaid** Absence during the date range selected. The **Absence Type** on the report will show

as either Paid or Unpaid and the **Reason** will provide additional details as to why this absence was taken. The **Start** and **End date** of the absence period is also provided together with the **Hours taken** and the date the record was **Last updated**.

## Sickness in Period

This reports includes the details of anyone in your team that has had a period of **Sickness** absence during the date range input. (Data from 1 August 2018 is available in this report. For information on sickness absence before this date please contact [HROperations@rhul.ac.uk](mailto:HROperations@rhul.ac.uk)).

Individuals that were in your team during the date range but have since moved role are also included in the report. The post title shows the post that they were in at the time of the absence. However, the Manager name is their current manager.

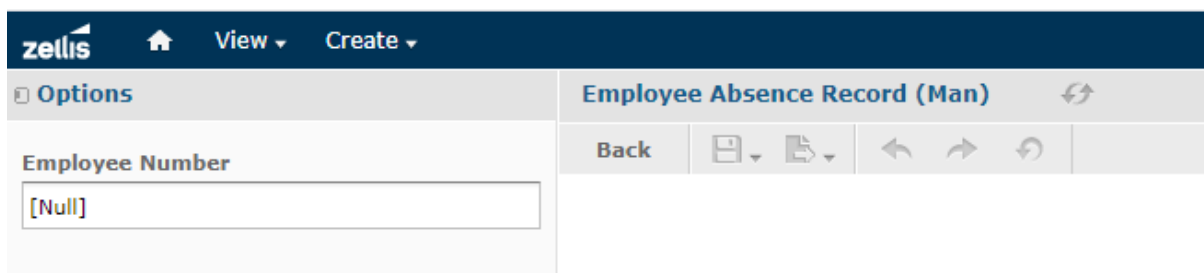
The **Absence Type** on the report will show **Sickness**. The **Start** and **End date** of the sickness absence period is also provided together with the **Hours taken** and the date the record was **Last updated**. This report can be used to check periods of sickness absence for your team and identify when **Certificates** (Fit Notes) are due to expire by reviewing the **Cert. expiry** field.

**NOTE:** The **Hours taken** will only update once the sickness absence has been processed by Payroll at the end of the month. This may explain why the **Hours taken** value shows as zero in some instances.


## Employee Absence Record

This reports includes the all the absence details for anyone in your team that has had a period of absence during the last 2 years.

To run the report click on the report name and then enter the Employee Number for your team member. The Employee Number can be found in the Team Details report or in the

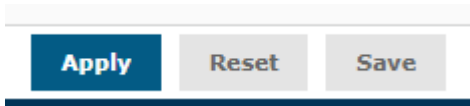


The screenshot shows the Zellis user interface. At the top, there is a dark blue header with the Zellis logo, a home icon, and menu options 'View' and 'Create'. Below the header, there is a light grey bar with the report title 'Employee Absence Record (Man)' and a refresh icon. Underneath, there is a search bar labeled 'Employee Number' with a dropdown menu showing '[Null]'. To the right of the search bar, there are several icons: 'Back', a save icon, a print icon, and navigation arrows.

The Employee Number can be found in the Team Details report or in MyView (My People > Select/View the individual >  the number next to this icon is the employee number.

Select Apply at the bottom of the screen.





The report will run and generate a report.

The Absence types include:

Absence type	Annual Leave Sickness Paid Absence Unpaid Absence Career Break Phased Return to work Sabbatical Leave Booked TOIL Worked TOIL
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## Annual Leave Entitlements

This reports includes the details of anyone and their annual leave entitlement for the current leave year.

- **Entitlement** shows the number of hour’s annual leave the person has been given as part of their annual leave allowance for the year.
- **Added Hours** shows any annual leave that has been added to the entitlement balance. For example, annual leave carried forwards from one year to the next leave year will appear here.
- **Hours Taken** shows how many hours have been booked and taken by the individual for the year. **NOTE:** This includes hours that have been booked in advance and not yet taken.
- **Remaining** shows the number of hours that are still to be booked in the current leave year.

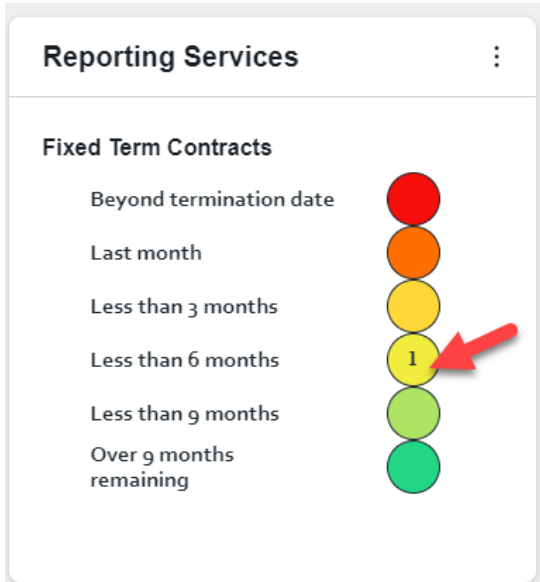
Annual Leave Entitlements													
Projected End	Position Status	Contracted	Hours Start	Hours End	Entitlement	System Adjustment	Manual	Added Hours	Reduced Hours	Hours Taken	Remaining	Period Start	Period End
	FTP	35	31 Jan 2015		189	0	0	49	0	101.5	136.5	01 Aug 2020	31 Jul 2021
	FTP	35	04 Jul 2016		189	0	0	56	0	49	196	01 Aug 2020	31 Jul 2021
31 Jul 2021	FTFX	35	01 Jul 2020		189	0	0	0	0	0	189	01 Aug 2020	31 Jul 2021

## Fixed Term Contract report

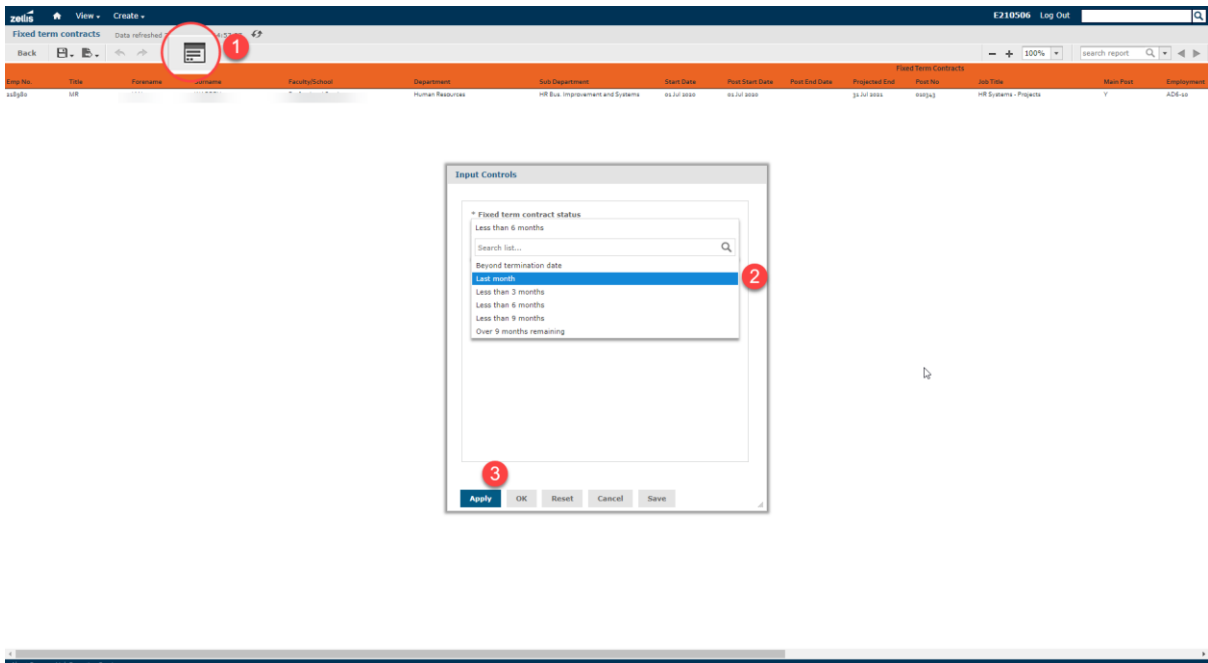
This reports includes the details of anyone on a Fixed Term contract and the traffic light colours on the widget indicate when the Fixed Term contract is due to end. As a Manager it is important that you follow the End of Fixed Term Contract process. If you are unsure what

this is and have individuals with less than 6 months to run on their contract please contact [HROperations@rhul.ac.uk](mailto:HROperations@rhul.ac.uk) for further information.

To run the report click on the number on the widget.



If you have multiple people in your team on Fixed Term contracts you can see other reports by clicking on the Input Controls on the top left (Step 1) and then selecting the period you want to view (Step 2). To run the report select Apply (Step 3).



## Data definitions

The following data items are included in the reports. If when you run a report and there is a column heading that you want to understand the meaning of, use the search function to find the definition here. The order that the data items are listed in follows that seen most commonly in the reports.

Data item	Definition
School / Professional Service	<b>Organisation hierarchy (Level 3)</b>
	Doctoral School School of Business and Management School of Engr, Phys and Math. Sciences School of Humanities School of Law and Social Sciences School of Life Sciences and Environment School of Performing and Digital Arts Principal's Office - Support Professional Services
Department	<b>Organisation hierarchy (Level 4)</b>
	Includes Academic Department and Professional Service areas.
Sub Department	<b>Organisation hierarchy (Level 5)</b> Includes Professional Service teams.
Employee Number	NNNNNN Unique reference number, 1 per employee. Also known as Payroll Number. The same employee number is used when someone re-joins the College. An employee can hold multiple posts (i.e. have more than 1 post number but only one employee number).
Emp + Post Number	A unique reference number joining together the Employee number and post number to provide a unique number for each employee and post.
Title	DR MISS MR MRS MS MX PROF
First Forename	First Forename
Surname	Surname
Known as name	First forename person prefers to be called/known as.
	DD/MM/YYYY

Employee Starting Original Date	Date on which the employee first started in the College
Current Date	DD/MM/YYYY Date on which the employee started in the College during this period of employment
Leave Date / End Date	DD/MM/YYYY Date on which the employee ended with the College. This will be blank for current employees, unless they plan to leave in the future
Post Main Flag	Y – main post N – not main post
Post Holding Start Date	DD/MM/YYYY Date on which the post started.
Post Holding End Date	DD/MM/YYYY Date on which the post ended.
Post Number	Number that identifies the post. In some instances, there may be multiple employees per post. These are referred to as bucket posts. In general, for substantive employees there is 1 person per post.
Post Title	More commonly known as Job title (aka Post Title)
Probation Date	DD/MM/YYYY Date when probation period is due to end
Emp Probation	Same as Probation Date. Is the Date when probation period is due to end
Post Projected End Date	DD/MM/YYYY Date when the post is due to come to an end. Used to define the end date for Fixed Term Contracts and Casual posts.
Contract Hours	The number of hours the employee is contracted to work in a week. For hourly paid staff this will be zero.
WPY	Week Per Year contracted to work
WPY FTE	Calculated field. Week Per Year Full Time Equivalent (aka FTE)
Position Status Start Date	DD/MM/YYYY Date on which the position status started
Position Status	CAS - Casual FTP - Full time, permanent FTFX - Full time, fixed term FTPHP - Full time, permanent, hourly paid FTFXHP - Full time, fixed term, hourly paid VHP - Variable hours, permanent VHFX - Variable hours, fixed term PTP - Part time, permanent PTFX - Part time, fixed term PTPHP - Part time, permanent, hourly paid PTFXHP - Part time, fixed term, hourly paid TTP - Term time, permanent TTFX - Term time, fixed term TTPHP - Term time, permanent, hourly paid Other

	Pensioners
Grade Start Date	DD/MM/YYYY
	Date on which the employees grade started
Grade End Date	DD/MM/YYYY
	Date on which the employees grade ended
Grade	ACADVISIT ATYPICAL EMERITUS GOVERNOR GRADE10B GRADE10C HONORARY IR35 OSGRADE7 Off-scale grade 7 OSGRADE9 Off-scale grade 9 OSNOGRADE Off-scale no grade PENSIONERS PROFBAND1 PROFBAND2 PROFBAND3 PROFBAND4 PROFBAND5 RHUL 10 RHUL 2 RHUL 3 RHUL 4 RHUL 5 RHUL 6 RHUL 7 RHUL 8 RHUL 9 RHUL2(HP) Grade 2 Hourly Paid RHUL3(HP) RHUL4(HP) RHUL5(HP) RHUL6(HP) RHUL7(HP) RHUL8(HP) RHUL9(HP) UNPAID
Grade Current Point	Spine point on Royal Holloway pay scale 002-049
Service Condition ID	ACADEMIC CASSER5 - Casual Service Conditions GOVENOR GRADES1-5 GRADES6-10 IR35 NOSERVCOND
HESA Academic Employment Function	Academic contract teaching only Academic contract research only Academic contract teaching and research

	Not an academic contract Academic contract neither teaching nor research
Staff Group	A6-10V - Academic 6-10 Variable ACAD - Academic ACVISI -Academic Visitor AD1-5 - Administration - Grade 2-5 AD1-5V - Administration - Grade 2-5 Variable hours AD6-10 - Administration - Grade 6-10 CASUAL - Casual workers EMERIT - Emeritus EXEXAM - External Examiners GOV - Governors HON - Honorary IR35 MA6-10 - Manual 6-10 MANUAL - Manual MANVAR - Manual Variable hours OTHER PENS - Pensioner RES - Research RESV - Research Variable hours TEC1-5 - Technical Grade 2-5 TECH - Technical TECHV - Technical Variable hours VISIT - Visitor
Cont Hr Start Date	DD/MM/YYYY Contract hours start date
Cont. Hr. End Date	DD/MM/YYYY Contract hours end date
Current Start Date	Date that the individual started their current period of employment
Current LoS [Yrs/Mths]	The current Length of Service that an individual has in years and months.
Pat ID	Work Pattern ID
Position Status End Date	DD/MM/YYYY Date when position status ends
Grade Reason	Reason for grade change
<b>PDR Data</b>	
PRD Year	Year for which the PDR data is for.
PDR Status	Complete Not completed Not required
PDR Not required	Academic staff on probation Leaving Maternity leave Other Student worker Visiting teacher
PDR Reviewer	Name of PDR reviewer

PDR Meeting date	Date when PDR review meeting took place.
<b>Absence Data</b>	
Absence type	Annual Leave Sickness Paid Absence Unpaid Absence Phased Return to work Sabbatical Leave Booked TOIL Worked TOIL
Absence Start date	Date when Absence started
Absence End date	Date when Absence ended
Absence Hours taken	Number of hours of absence taken in period
Certificate	
Cert. expiry	Date when the certificate expires
Last updated on	Date when the sickness absence was last updated
<b>Paid and Unpaid Absence Data</b>	
Paid absence reason	Antenatal Compassionate Leave Conference Jury Service Medical Public duties Reservist Self-isolation Special leave Training Volunteering Work from home Work from another institution
Unpaid absence reason	Absent without leave Antenatal Career break Compassionate Leave Conference Jury Service Medical Public duties Reservist Self-isolation Special leave Training Volunteering
<b>Annual Leave Absence Data</b>	
Entitlement	The number of hour's annual leave the person has been given as part of their annual leave allowance for the year.
System Adjustment	System adjustments will be recorded here
Manual	Manual adjustments may be recorded here

Added Hours	The number of hours annual leave the person has had added to their annual leave allowance for the year. Hours carried forward from one annual leave year to the next will be recorded here.
Reduced Hours	The number of hour's annual leave taken off the entitlement.
Hours Taken	The number of hour's annual leave the person has booked or taken in the leave period.
Remaining Hours	The number of hour's annual leave the person has remaining in the leave period. Remaining = (Entitlement + System Adjustment + Added Hours) - Hours Taken
Period Start	The date on which the annual leave entitlement starts
Period End	The date on which the annual leave entitlement ends

## Frequently Asked Questions

### Why does an employee appear on the report more than once?

An employee may appear in a report multiple times if they have had multiple appointments / changes during a period. For example, if they have two different appointments with you then their details will show on the report twice.

### Can I see information for people who don't report to me?

By default the data presented to you in the reports is only for individuals who report to you, either directly or indirectly. If there is a requirement within your role to view data for everyone in a particular school, then please request access to this data from the HR Systems team.

### How accurate is the data?

When you run a report will see live data from the HR and Payroll system. If the reports contain data that is different from what you are expecting contact [HRSystems@rhul.ac.uk](mailto:HRSystems@rhul.ac.uk) who will investigate for you.

### Who can I share this data with?

This data is specific to you as a line manager and should not be shared with others who do not have a legitimate need to access it. Check with the Data Steward for your area or [dataprotection@royalholloway.ac.uk](mailto:dataprotection@royalholloway.ac.uk) if you are not sure if data should be shared or not.