



THE UNIVERSITY *of* EDINBURGH

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# A Guide to Learning, Skills and Qualifications for Line Managers

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## Introduction

This guidance aims to support line managers using the Learning, Skills and Qualifications apps within People and Money. Managers should also familiarise themselves with the [Guide to Accessing Learning, Skills and Qualifications for Employees and Learners](#).

How you access and manage staff learning will change from November 2021 with the launch of the new People and Money Learning app. This will create a centralised space for staff and line managers, where they can search for and undertake learning as well as maintain records of their personal/professional skills and qualifications.

There are two apps in People and Money:



University Learning Providers (departments that design and provide learning for staff) will aim to move most staff learning into the Learning Catalogue on People and Money by the summer of 2022, prior to this learners and line managers may need to search for and access learning from a variety of existing sources (MyEd, Moodle, Cardinus, Learn etc.). People and Money should be the first search area.

Learning, Skills and Qualifications offers a place to record any learning completed (via courses in People and Money and External Learning). It is also a way for managers to view this information for their team.

Details of Learning Providers who manage learning at the University of Edinburgh can be found [here](#).

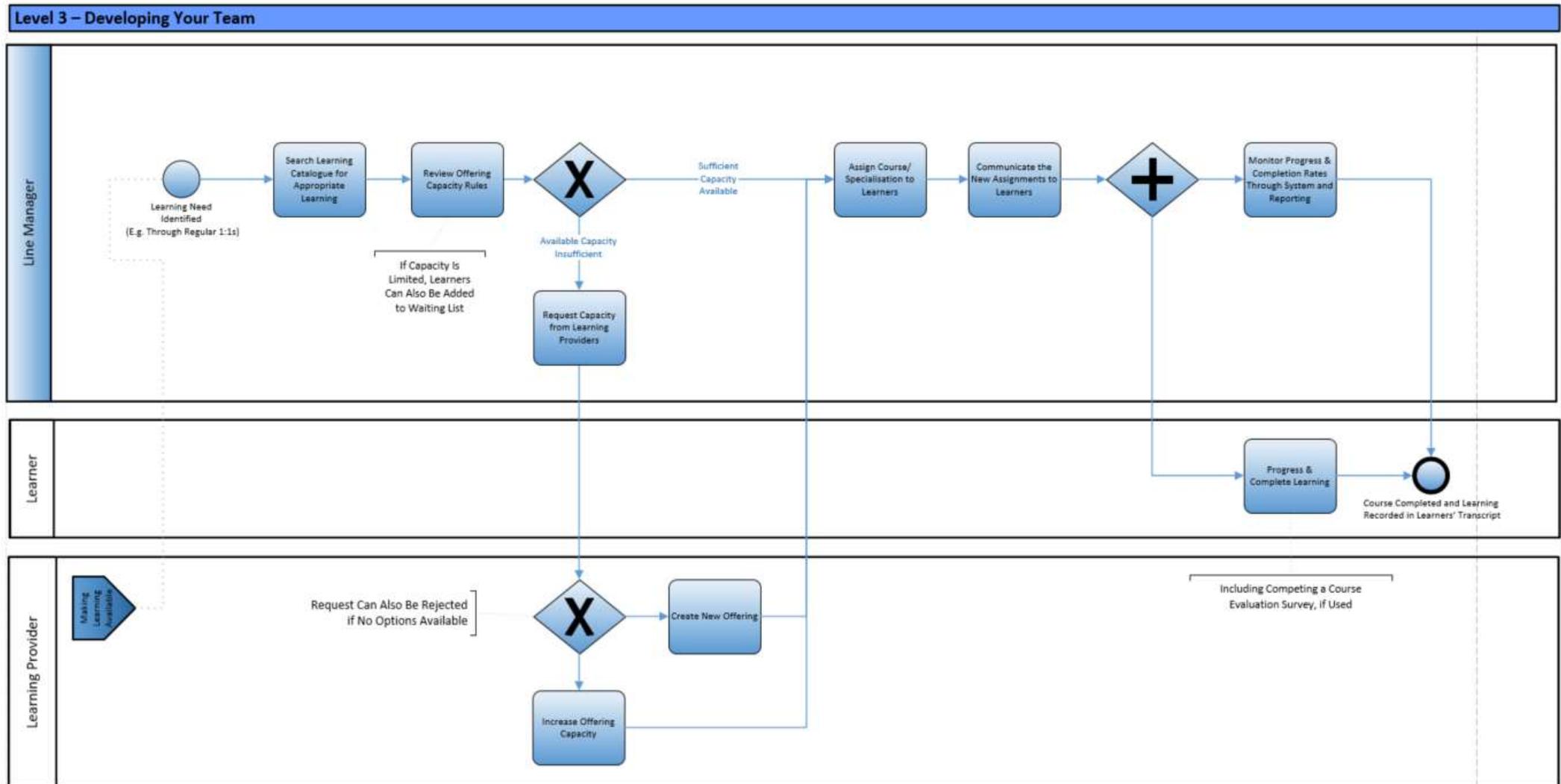
Please note that the system terminology uses American spelling, for example 'catalog, specialization, license' etc. This document has been written using British English.

## Glossary (A-Z)

<b>Terminology</b>	<b>Explanation</b>
Activity	Content within an offering that the learner must complete. For example, an activity may be 'Prep work to do for First Aid Training', or in an example where the learning is held over multiple days- each date, location would be called out in a separate activity.
Assignment	A one-time only assignment of some learning. Assignments can be for a course or an offering. Assignments can be self-assignments (done by the individual), or assigned by the manager, or others (i.e., Learning Provider)
Blended Learning	A blend of learning where some elements of the learning will be instructor-led, and some elements will be self-paced.
Certification	A status or level of achievement confirmed in an official document. Often a certification is achieved following the successful completion of a professional training programme or course. An example of a certification required for staff working in catering in the University is the 'Royal Environmental Health Institute of Scotland (REHIS) Elementary Food Intermediate Certificate'.
Course	A course is an entity in the Learning Catalogue that defines what learners will learn from completing an offering.  A course is made up of offerings, which are instances of the course that contain information about how, when, and where you undertake the learning. For example, a course called 'First Aid' may have an instructor-led training offering in Edinburgh, another instructor-led training offering in Glasgow, and a self-paced online offering. You can decide which offering of the course they wish to take. Learners will have learned the same things which ever offering they complete.
Delivery Mode	How the course or learning is given – either instructor-led, self-paced or blended
External (Noncatalog) Learning	Learning completed outside of People and Money Learning, which you want to record within the system using the action "Record External Learning Experience" this is then visible in your transcript as a non-catalogue item. The learning can be completed externally or internally using a different system.
Instructor	The person delivering the training, whether in -person or online. There are two types of training facilitator described in P&M, either Instructor or Training Supplier, to describe the person delivering the training, whether in person or online. Instructors are university staff within P&M whereas training supplier will usually be an external facilitator.
Instructor-Led Learning	There will be a real time facilitator leading the learning item - this may be in person or delivered live on a digital meeting platform. Synchronous Learning.
Learning Catalog	The searchable catalogue of learning (includes Courses, Offerings, Communities, Specialisations)

Learning Provider	The department or area that provides certain learning activities. You can search the Learning Catalogue by 'Learning Provider', and you will see for example all the courses which are provided by 'Health and Safety' or 'HR' etc.
Learning Record	The employee's record within P&M that shows courses which are completed, in progress, not completed, assigned, and suggested
Licence	A formal permission granted to an individual from the government or other authority to do something. An example of a licence required for a number of jobs in the University is a valid driving licence. Another example is a Home Office Personal Licence that gives permission to an individual to undertake regulated procedures in biomedical research.
Offering	A specific instance of a course. For example, this may be 'First Aid Training Day Edinburgh' or 'First Aid Training Day Glasgow'. These elements sit within a Course, they are in effect the building blocks of a Course.
Prerequisites	An item, definition, or level that learners must meet to undertake the learning. An example would be 'the prerequisite for enrolling in Advanced Python Skills is that you have completed the 'Introduction to Python'.
P&M	People and Money.
Qualification	A qualification is a pass of an examination or an official completion of a course, for example BA Hons, GCSE, Advanced Higher.
Recommended Learning	Learning content in the catalogue can be recommended to a Learner by a colleague or manager. The Learner will receive a notification of the recommended learning. (e.g., Course, Offering, Specialisation)
Registration	A registration is a professional registration with a relevant professional body that recognises the individual's ability to practice in a specific professional capacity and their commitment to the agreed standards. An example is the Nursing and Midwifery Council Registration
Required Learning Assignment	Completion of this learning is required by a specified date. The learner will receive a notification of the required learning. The learning is assigned to the learner by either their manager or by a learning provider/ HR. If not completed by the specified date, this is defined as overdue learning in P&M.
Self-Paced Learning	The learner decides when to complete the learning, normally this will be an eLearning course.
Specialization	A specialisation is a logical grouping of courses aimed to help learners achieve learning goals in a larger learning objective.
Voluntary Learning Assignment	Learning that the learner chooses to undertake, which has been assigned. Assigned learning can be for a course or an offering.

# End to End Process Map



## Key Roles

<b>Role</b>	<b>Description</b>
<b>University of Edinburgh employees and employees in subsidiaries</b>	All university members of staff will have access to view learning activities, to enrol and complete them, where appropriate, and to record learning they have completed, externally to the University in their People and Money learning record. Students will not have access to learning in People and Money unless they are an employee and should use their employee login.
<b>Line Manager</b>	All members of staff that have or will have direct or matrix -style management responsibilities for the employee or team. Line Managers will have access to Learning, Skills and Qualifications for themselves and their team.
<b>Learner</b>	Employees within the University
<b>Learning Provider</b>	Staff that design and provide learning within the University

## Before you start

Everyone will have access to the Learning, Skills and Qualifications apps through 'Me' and line managers will also be provisioned with 'My Team' access.

Familiarise yourself with the [People and Money User Guides](#) and [Videos](#) for the Learning, Skills and Qualifications processes and check the [People and Money Updates webpage](#).

If you are a line manager, please ensure that you are in the correct screen/ area of People and Money Learning for either yourself or for direct reports. As a line manager, you will have an option to open an area called 'My Team > Learning'.

### Responsibilities of a Line Manager - Why you should access the Learning Skills and Qualifications Apps

- Seek opportunities to actively encourage the use of Learning, Skills & Qualifications in their teams
- To make the most of your new hires' on-boarding experience by recommending appropriate learning
- To support your team in improving their performance
- To have more meaningful annual reviews and one-to-one conversations
- To keep track of your team's learning progress and identify learning requirements
- To have visibility of your team's skills & qualifications

What you will have access to	What you will do
<ul style="list-style-type: none"><li>• Access to the self-service Learning app</li><li>• Access to the self-service Skills &amp; Qualifications app</li><li>• Notifications via the system and e-mails via your employee account</li><li>• Access to your direct reports' learning and skills &amp; qualifications records</li><li>• Access to learning reports</li></ul>	<ul style="list-style-type: none"><li>• Assign and/or recommend learning to your direct reports individually, or as a group, including new hires</li><li>• View and track your team's learning activities and progress through a dashboard/ report</li><li>• View your team's skills and qualifications,</li><li>• Approve essential Licences, Certificates and Registrations</li></ul>

## The Learning Catalogue

You may wish to access learning opportunities for your direct reports for various reasons, for example to support onboarding and induction, to support your team in improving their performance, to support the annual review process and to keep track of your team's learning progress and identify learning requirements.

The Learning Catalogue provides a way to signpost and provide access to the learning content that you wish your team to undertake. As a manager, you can assign and recommend learning. The courses within the learning catalogue will have different delivery modes, these include:

- Self-paced offerings (including toolkits) which are always available
- Self-paced online offerings which will have a required completion date
- Scheduled instructor-led offerings which will occur on certain dates, either face-to-face or via digital platforms such as MS Teams or Zoom
- Blended learning which will be a mixture of self-paced and instructor-led learning activities
- All LinkedIn Learning content
- Learning Communities which group content together and can signpost learning options to staff

If you cannot find the course you are looking for, please refer to the details of learning providers who manage learning at the University [here](#).

In addition, managers can record 'external learning' (learning that is currently not in the People and Money learning catalogue). For example, in Estates, teams run Tool-box talks, managers can easily record these using the 'Record External Learning for my Team' action. This information will sit alongside the learning completed within the Learning Catalogue, visible in the learning transcript for the direct report.

## Learning for New Starts

Onboarding tasks sent through People and Money will direct new employees to complete suggested learning and review and update their Skills and Qualifications.

Line managers will also receive an onboarding task to assign any applicable learning to their new team member.

## What should I do if I have a question regarding Learning, Skills and Qualifications in People and Money?

Please watch the user [videos](#) and search My Knowledge for support in the first instance. Follow the P&M user guide '[How to search my knowledge](#)'. If you cannot find the information required, raise a service request, following the P&M user guide '[How to raise and maintain a service request enquiry](#)'.

### Other points to note

- Any previously completed learning prior to the launch of Learning in People and Money **will not** be automatically added to a learning record. The record of completed learning can however be added manually by the employee or manager.
- Managers should continue to make all requests for external learning following current local process. Further information is available on the [procurement webpage](#).
- Unless your team member joined the University since the launch of People and Money (November 2020), in most cases, the Skills and Qualifications app will be blank. All staff can review and update this information at any time, see the '[Skills and Qualifications](#)' section below for further information.

## How to Browse the Learning Catalogue, Assign and Recommend Learning

A line manager can browse the learning catalogue to find suitable learning to recommend and assign to their direct reports. The learning catalogue will contain courses and resources created by University of Edinburgh Learning Providers as well as all LinkedIn Learning courses. Note that content within the learning catalogue will increase over time.

Managers can *assign* learning to their direct reports, can *recommend* learning to their direct reports, either to individuals or to a group. For example, for your team. Assignment of learning can be at course level or offering level. Prior to assignment of any learning, managers should discuss with their direct report(s) the reason for recommending a learning item.

By assigning a course, the employee can then choose the offering (instance of the course) that they wish to enrol in. If you wish to assign a specific offering to a member of staff or team, you should first check their availability to attend.

Assigning learning has two options, required or voluntary learning. **Managers should only assign learning as ‘voluntary learning’**. Assignment of ‘required’ learning is at the discretion of HR or Learning Providers.

Voluntary learning will not have any completion dates specified by the system. Required learning will appear as a task (to be completed) with a set completion date.

If the manager is required to approve a direct report’s learning, for example, where there is a cost implication, this should be done by local process and not within People and Money.

The [P&M User Guide – Line manager – How to manage team learning](#) and [P&M User Guide - Line manager - How to Track, Edit or Cancel Direct Reports Enrolments](#) will support managers in this process.

### Waiting Lists

Some courses will have a maximum capacity of attendees. Employees will be able to join a waiting list once the maximum capacity is reached, and to withdraw from the waiting list if they choose to. Managers will be able to see that their direct report is on a waiting list.

## Withdrawing from or Cancelling a Course

Line managers may need to withdraw from or cancel attendance of a course or offering for their direct reports. Alternatively, Learning Providers may also cancel and withdraw learners. Prior to withdrawing any learning line managers should discuss with their direct report the reason for withdrawing or cancelling a learning item.

Managers can withdraw learners from voluntary assignments but cannot withdraw a learner from a required assignment set by someone else.

Managers can cancel/remove external learning from their direct report's records.

The [P&M User Guide - Line manager – How to Track, Edit or Cancel Direct Reports Enrolments](#) will support this process.

If you cannot withdraw a direct report from a course you should contact the Learning Provider, details of this can be found in the course syllabus within the learning catalogue.

## Communicating with the Learning Provider

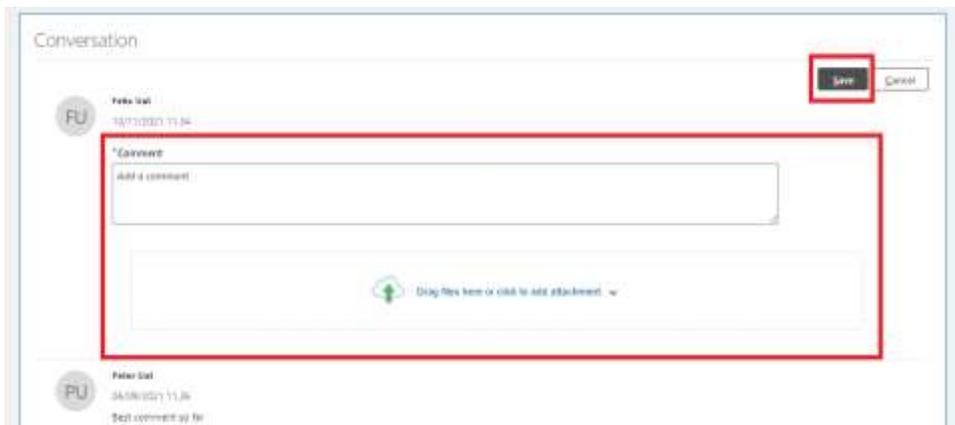
If you have questions about a course, specialisation or offering you should contact the Learning Provider, details of this can be found in the course syllabus within the learning catalogue.

Some courses or offerings will make available a feature where communication can occur within People and Money. These exchanges can be open to anyone, before they enrol, or they are only available to learners who have enrolled in the course/offering.

When the option is enabled in Actions you will see 'Comments'



Comments are posted in a Conversation space that may or may not be structured, depending on the set up relating to the learning item it is associated with. You can add comments, which can be replied to and moderated by the organiser. You will also see other participant's thoughts.



## Viewing Course Completion and Learning Activities

Line Managers can:

- Can see their direct reports' learning record, including the status of their courses, 'Enrolled' or 'Completed'.
- Can view reports on learning activities undertaken in People and Money via the 'Line Manager Dashboard' app. This returns data for the line manager's direct and indirect reports. If you are a line manager who is also a School/Department Administrator, you will be able to bring back data for your Area of Responsibility. There are two tabs available in the Line Manager dashboard in respect of Learning, Skills and Qualifications; namely, the Learning Transcript showing a detailed view of team learning and the Certificates Overview, showing an overview of certificates held within the team.

**Please note** that data within the Line Manager dashboard will take time to build up as learner's complete courses or update their certificates. There will be no transfer of historic data to People and Money at launch.

The [P&M User Guide – Line manager - How view the Line Manager Dashboard](#) (please note this is available under the 'General' heading on the user guide webpage), will support managers with how to use the Line Manager Dashboard.

## Adding external learning or previously completed learning to your direct reports learning record

A good way for a learner to keep track of continuous professional development (CPD) is to add learning taken outside the University to their learning record. Once a learner has done this, it will also be visible to their line manager.

Line Managers can view their direct reports' learning records including external learning that they have added and can add external learning for their direct reports.

The [P&M User Guide - How to record an external learning experience](#) provides further information on how to add external learning.

## Skills and Qualifications – How to view, approve and update

All employees will be able to update their skills and qualifications through Me>Skills and Qualifications within People and Money at any time. Line managers can view and update their direct reports learning, skills and qualification record and will approve any additions to Licences, Certifications and Registrations (Essential for current role).

The [P&M User Guide - Line manager – How to Review, Approve and Update Skills and Qualifications provides further information.](#)

If the qualification, licence, certification, or registration is not listed you can request that this be added. Please complete the [Request for additional qualification, licence or certification form](#) and submit this via a Service Request, Enquiry >Skills and Qualifications>Add missing content to option lists.

There is no requirement for employees to update this information but may be of benefit to support career progression discussions and help managers identify the skills and qualifications within their team. Skills and Qualifications will also be available to Hiring Managers during the recruitment process and internal applicants will be prompted to review and update these during the application process.

## Appendices

### Subsidiaries

There are three subsidiary companies: Edinburgh University Press, Edinburgh Innovations, and UoE Accommodation Ltd.

Subsidiaries do not have any Learning Providers specific to them or their areas/departments. However, all employees, including those working within a subsidiary will have full access to the Learning, Skills and Qualifications Apps in People and Money.