THE UNIVERSITY of EDINBURGH

People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email hrhelpline@ed.ac.uk.

Line Manager – How to Manage Team Learning

Line Manager
Estimate time to complete: 10 minutes

Contents

Introduction

Line managers will manage team learning by working with their direct reports to:

- Make the most of your new hires' on-boarding experience by recommending appropriate learning
- Support your team in improving their performance
- Have more meaningful annual reviews and one-to-one conversations
- Keep track of your teams' learning progress and identify learning requirements

People and Money will help to manage team learning by offering ways for managers to:

- Search the catalogue looking for options for their direct reports
- View team enrolments
- Assign learning to the team
- Recommend learning outside of your line management structure
- Gather more information on Learning – by viewing Ratings
- Pass details of the course on to others using other communication tools

This guide covers these processes.

Line Managers will also have access to processes found in other system user guides which focus on:

- Recording External Learning
- Using Skills and Qualifications
- Line Manager Dashboard
- Editing and Cancelling Enrolments

In Brief …

This section is a simple overview and should be used as a reminder.

Browse the learning catalog

1. From the home page navigate from **My Team** to the **Learning App**.
2. Select **Action** and choose **Search the Learning Catalog**.
3. Enter the course name or key word into the **Search bar**.
4. From the results click on the course title to view more information.

View Team enrolments – within People and Money

1. From the Home page navigate to My Team and select the Learning app.
2. Search for the name of the learner. Amend Enrollment Date Type and Date Range to see different information

NOTE: The Line Manager dashboard will also include a new tab called “Learning Transcript” which will provide you with another way to see team learning - See User Guide _ How to view Line Manager Dashboard

Assign Learning to your team

1. Follow steps 1-4 from the above **Browse the learning catalog**.
2. Select the **Actions** button and choose the option **Assign Learning to My Team**.
3. Complete the **Assignment Details** section. Select **Continue**.
4. Search for and select learners.
5. Review the learners and press **Submit**.

Recommend learning

1. Follow steps 1-4 from the above **Browse the learning catalog**.
2. Select the **Actions** button and choose the option **Recommend Learning**
3. Search for the person you want to recommend it to, add a comment if required and press **Submit**.

View Ratings

1. Follow steps 1-4 from the above **Browse the learning catalog**.
2. Select the **Actions** button and choose the option **Ratings**

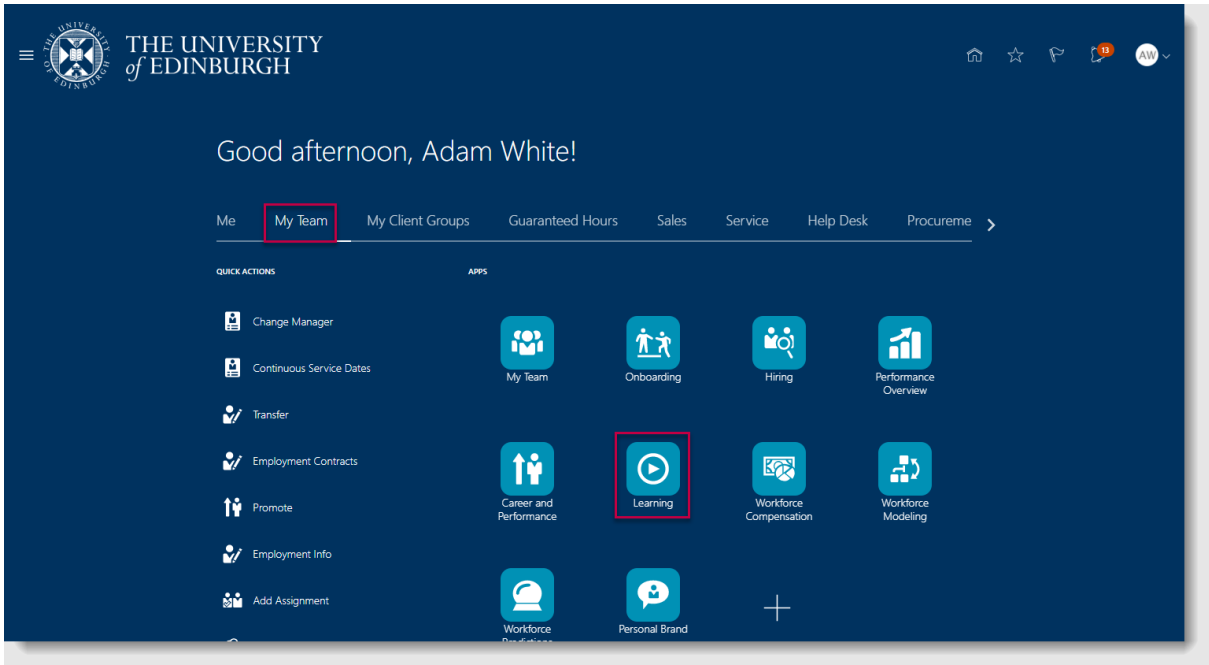
Copy and share links

1. Follow steps 1-4 from the above **Browse the learning catalog**.
2. Select the **Actions** button and choose the option **Copy Link.**
3. Share the link with Colleagues

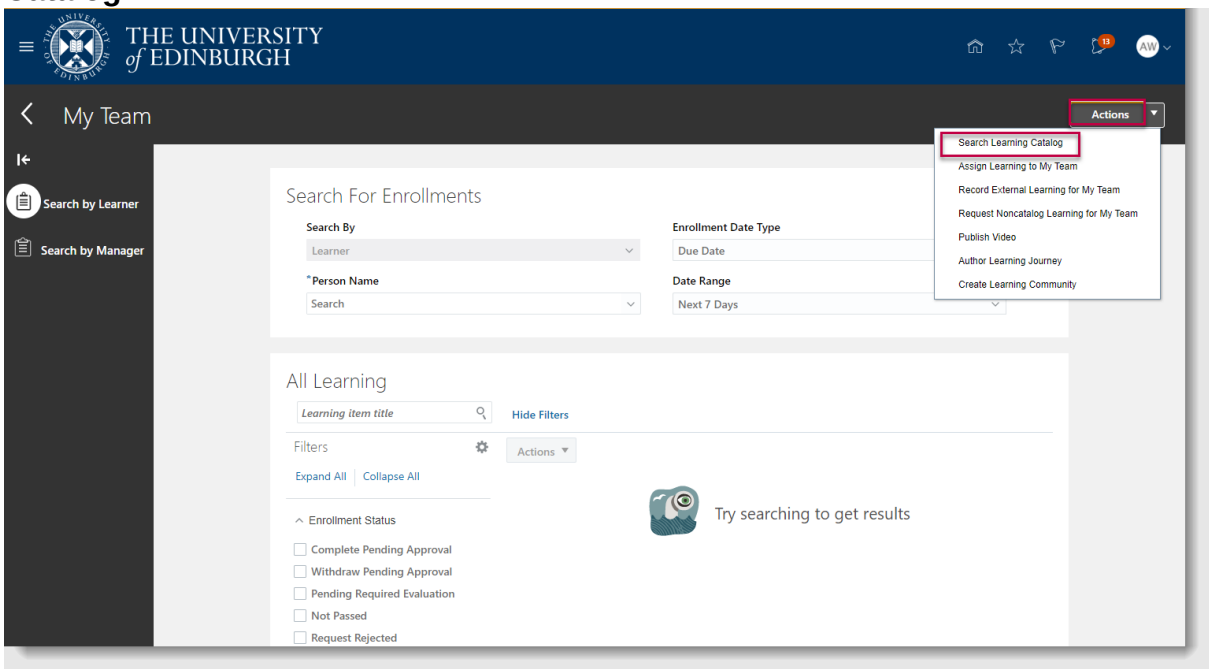
In Detail …

Browse the learning catalog

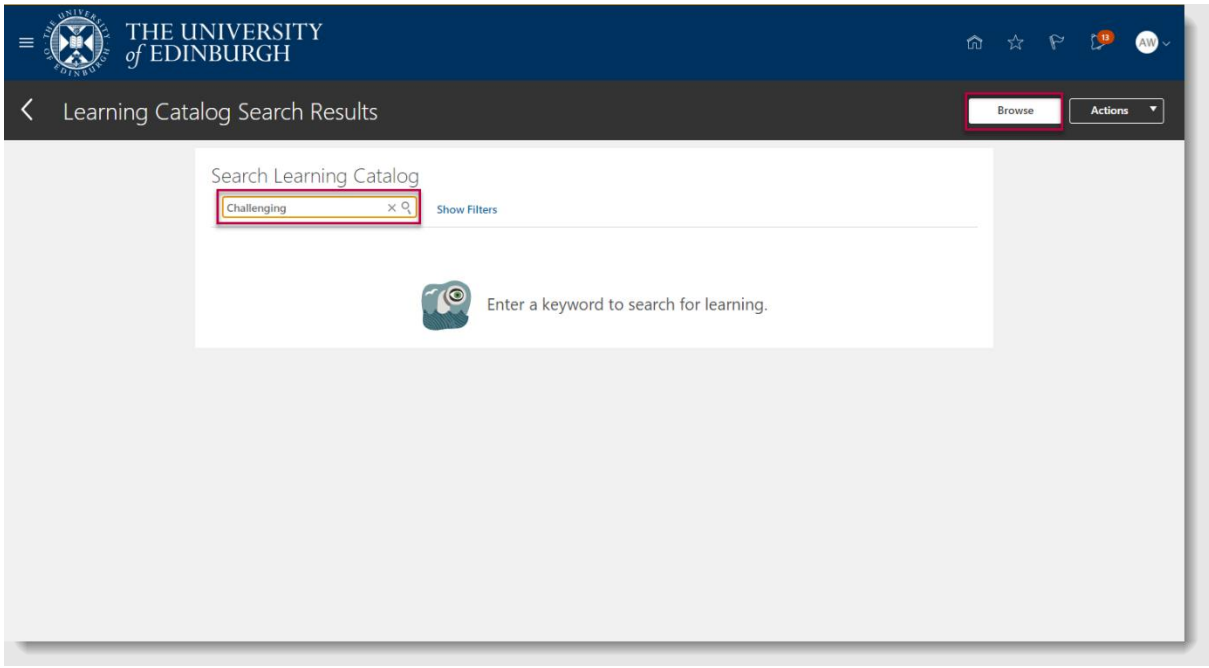
1. From the Home Page navigate from **My Team** to the **Learning** app.



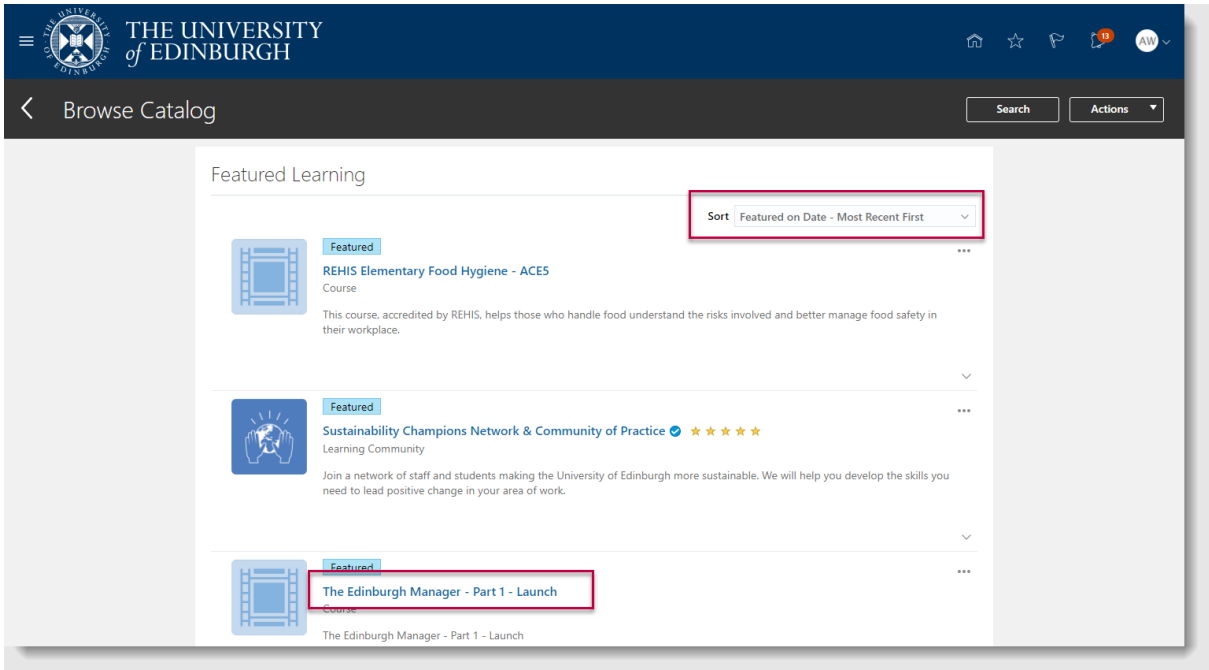
2. From the '**Action**' drop down choose the option '**Search the Learning Catalog'.**



3. Using the search bar enter the name of a course or a key word to search for relevant material. Select **Browse**.



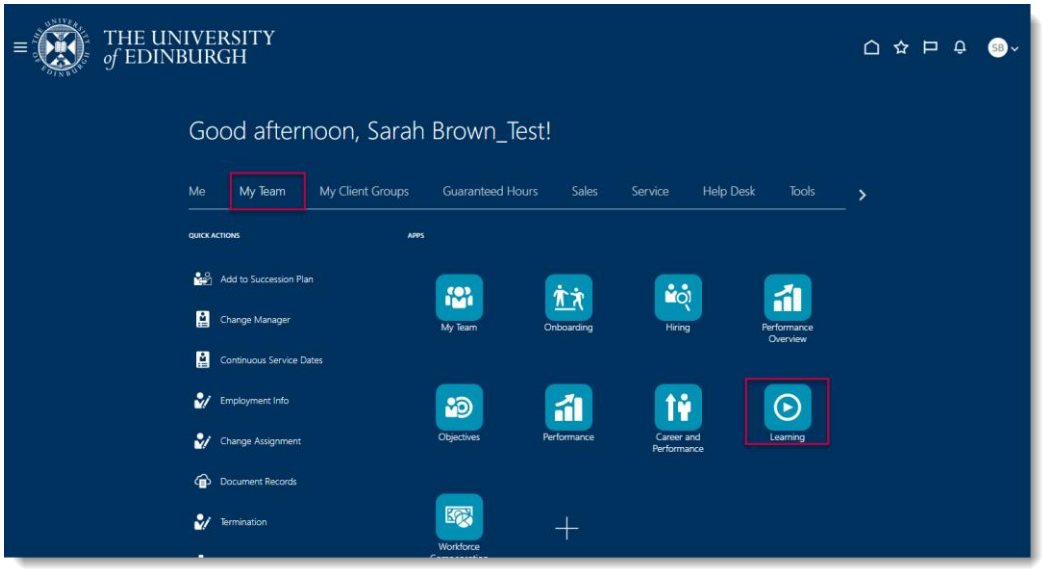
4. The results of your search will show. Depending on the number of results you can sort the list using the **Sort** drop down menu. When you find the best match click the title of the course.



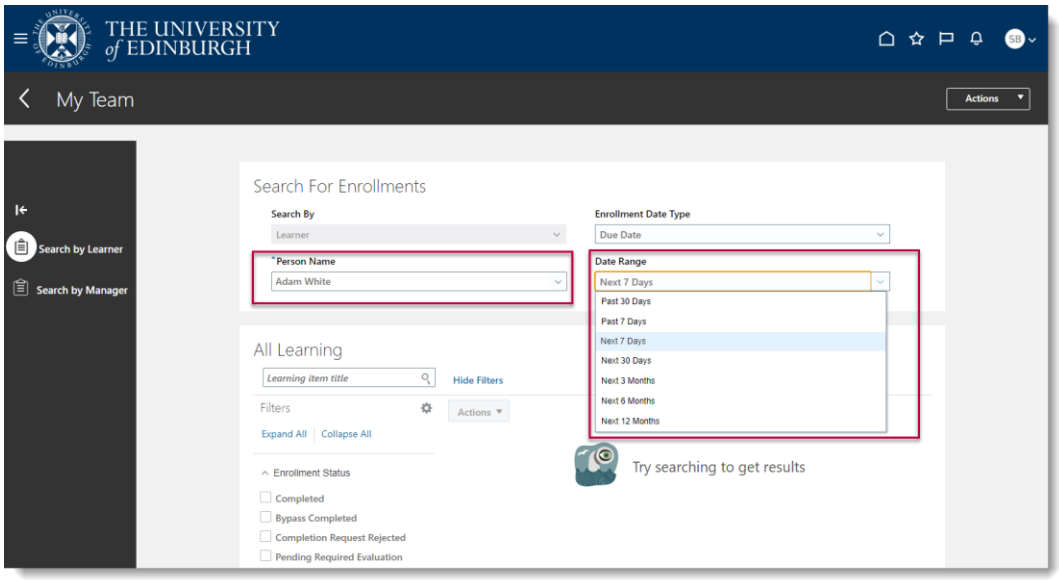
To see this process in brief click here.

View Team Enrolments

1. From the Home page navigate to **My Team** and select the **Learning app.**



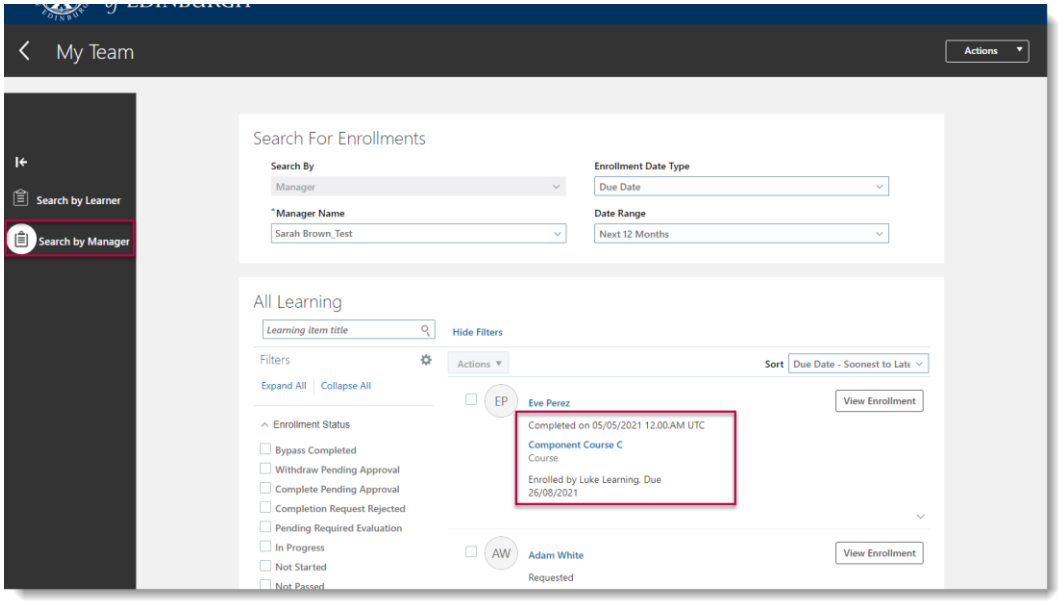
2. Search for the name of the learner.
   Change the Enrollment Date Type to see the different filter options at the top which will change the option available in Date Range.



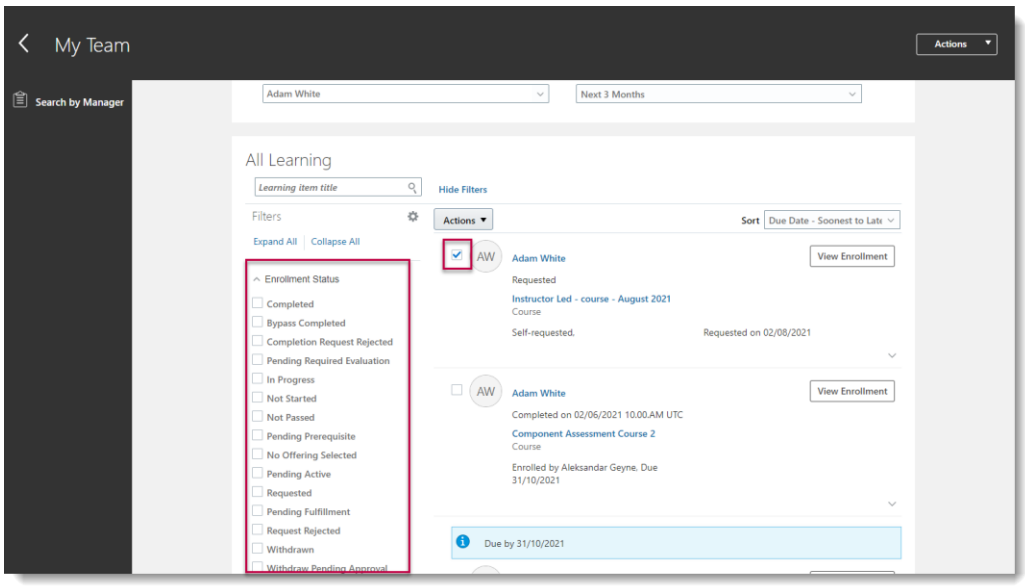
3. As a Line Manager you can also choose the option to **Search by Manager** by choosing the option from the menu on the left. The results will display the team enrolments for the Manager selected.

   Change the Enrollment Date Type to see the different filter options at the top which will change the option available in Date Range.

   Both options allow you to see the status of the enrolment, the due date and who enrolled the learner.



You can also use the filter options on the left to further narrow your search results.



Assign learning to your team

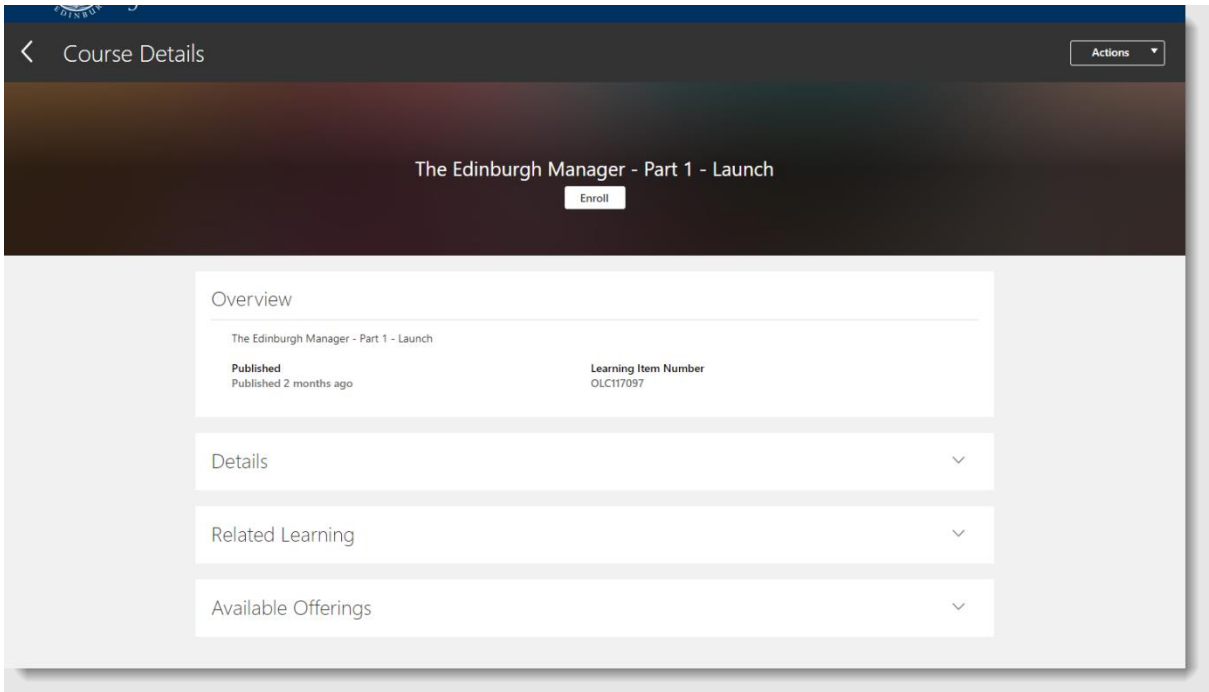
Required Learning Assignment	Completion of this learning is required by a specified date. The learner will receive a notification of the required learning. The learning is assigned to the learner by either their manager or by a learning provider/ HR. If not completed by the specified date, this is defined as overdue learning in P&M. Required learning must be done because there is either a UoE Policy or legal requirement to complete this learning or it is essential for the employee's role. We strongly suggest that required learning is assigned at a

	course level to allow for the learner to select the offering option that suits their needs.
Voluntary Learning Assignment	Learning that the learner chooses to undertake, which has been assigned. Assigned learning can be for a course or an offering. A due date can be added if relevant. If the employee enrols in a option from the self service it will also be noted as a voluntary assignment - with Self as the person who assigned this.

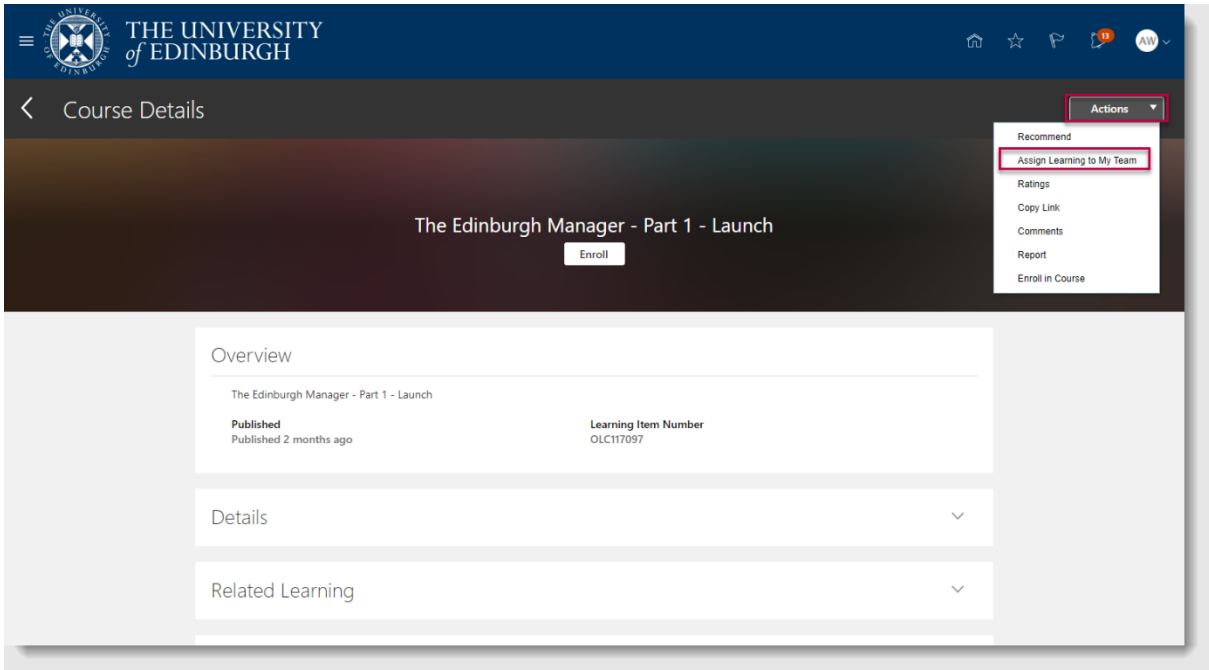
<u>Follow steps 1-4 from Browse the learning catalog.</u>

NOTE: If your direct report cannot attend a required Assignment, only the Line Manager or Learning Provider can withdraw them.

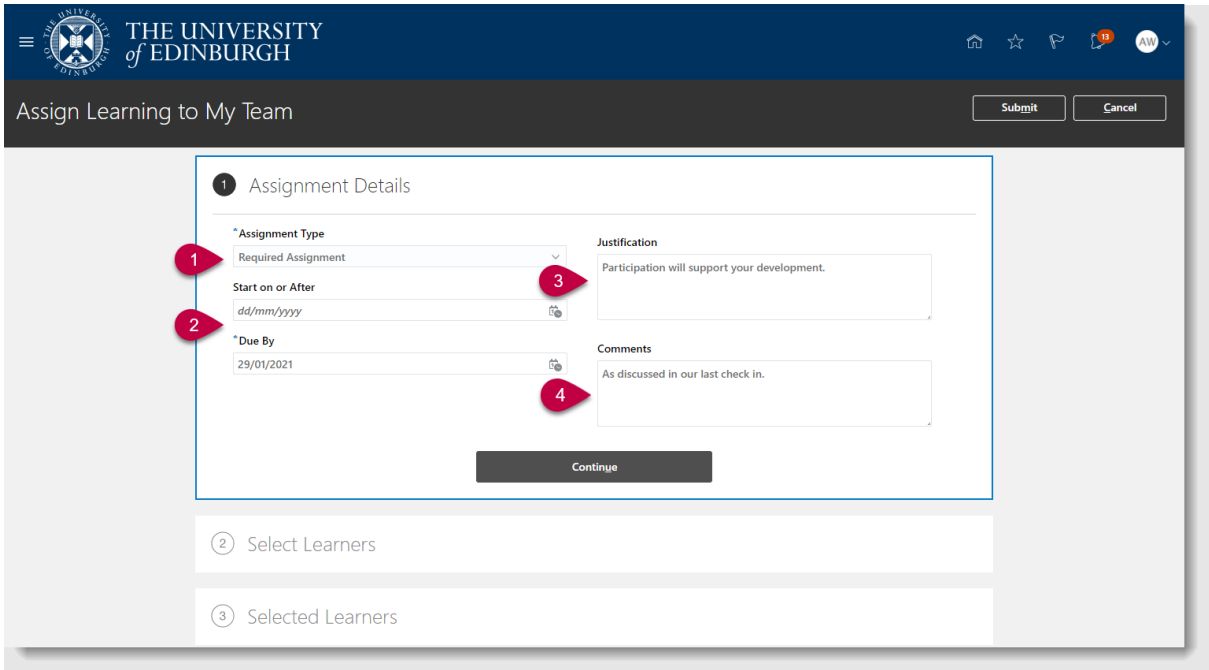
1. The Course Details page will show you **Overview** information, **Details**, **Related Learning** and **Available Offerings**.



To assign the course to your team or a specific direct report select the **Actions** button and choose the option '**Assign Learning to My Team'**.

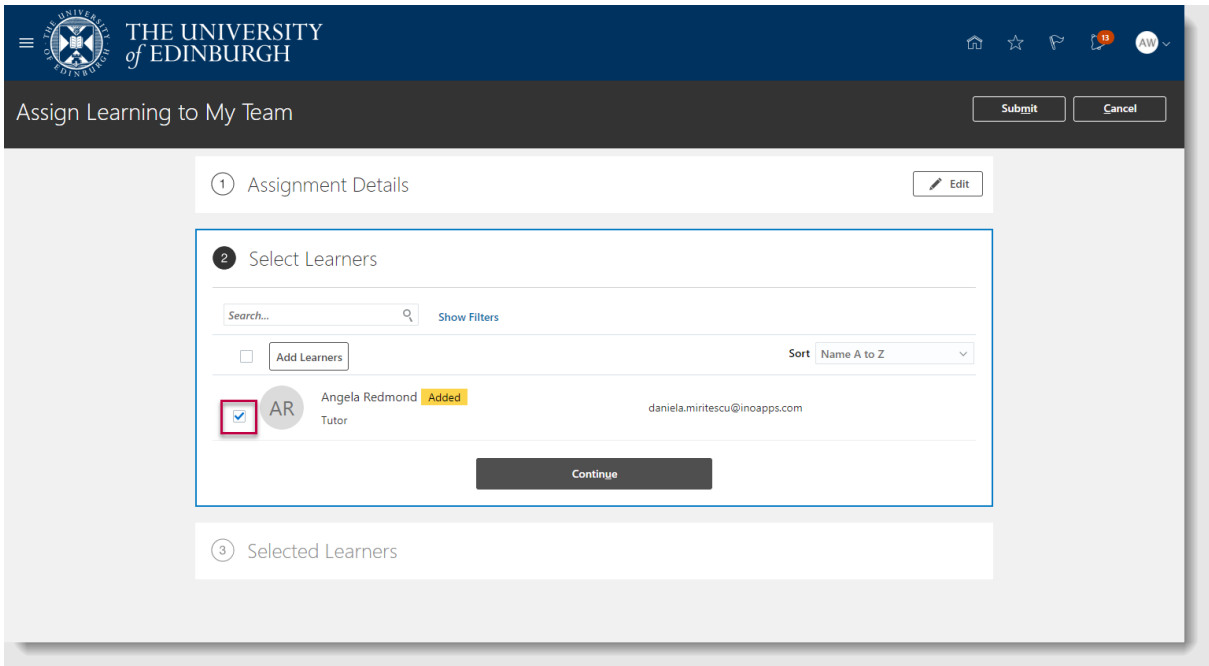


2. From the Assign Learning to My Team page complete the **Assignment Details** section. Select **Continue** to progress.

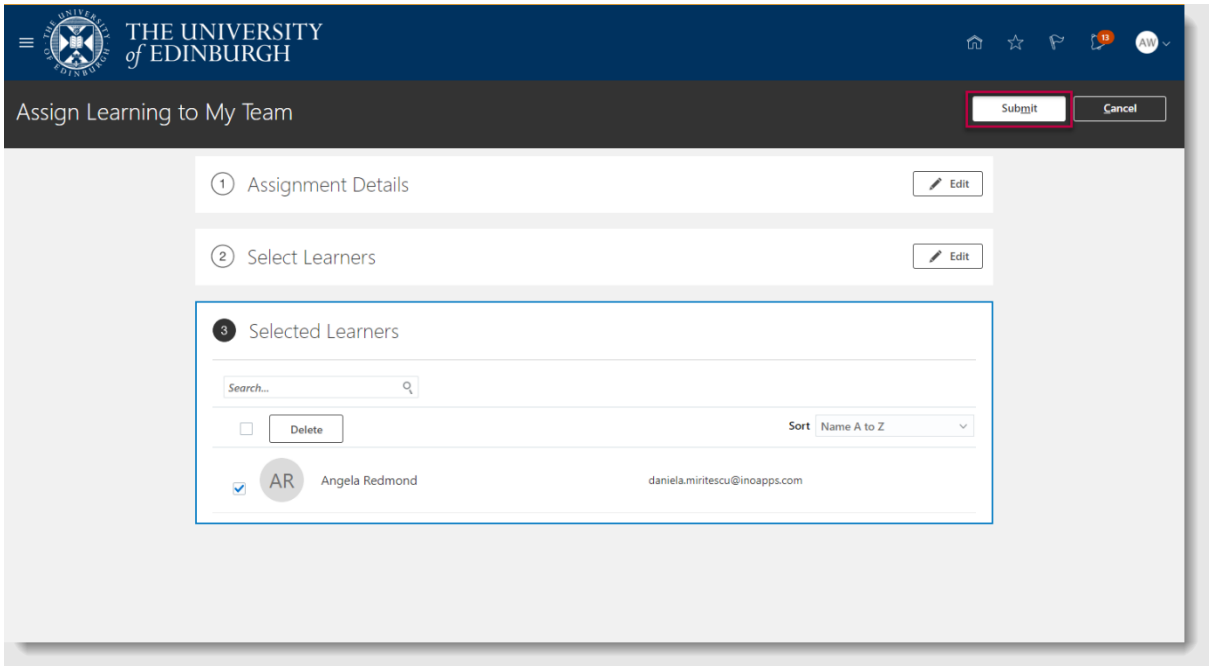


1. **Assignment Type** – mandatory field, specify whether the course is Required or Voluntary. NOTE: For synchronous learning, we recommend only creating a Required Assignment for a course, unless you know that the learner can attend the offering date(s).
2. **Date fields** – If you have determined the course is Required the due date will become mandatory and you should enter the last date possible for the course to be completed. The Start on or After field is optional. If you determined the course to be Voluntary both date fields are optional.
3. **Justification** – Optional field to note the reason for assigning the course
4. **Comments** – Optional field to not additional comments if needed.

3. Select the name of the learner(s) - your direct report(s) will be visible (or Search for indirect report). Click the **Add Learners** button after selecting the name(s). Selected learners will have the yellow Added option beside their name. Select **Continue** to progress.



4. The final stage is to confirm the names of the colleagues you are assigning the course to. When you are happy with those selected press **Submit**. You can remove any mistakes by clicking the box beside their name and selecting the Delete button.



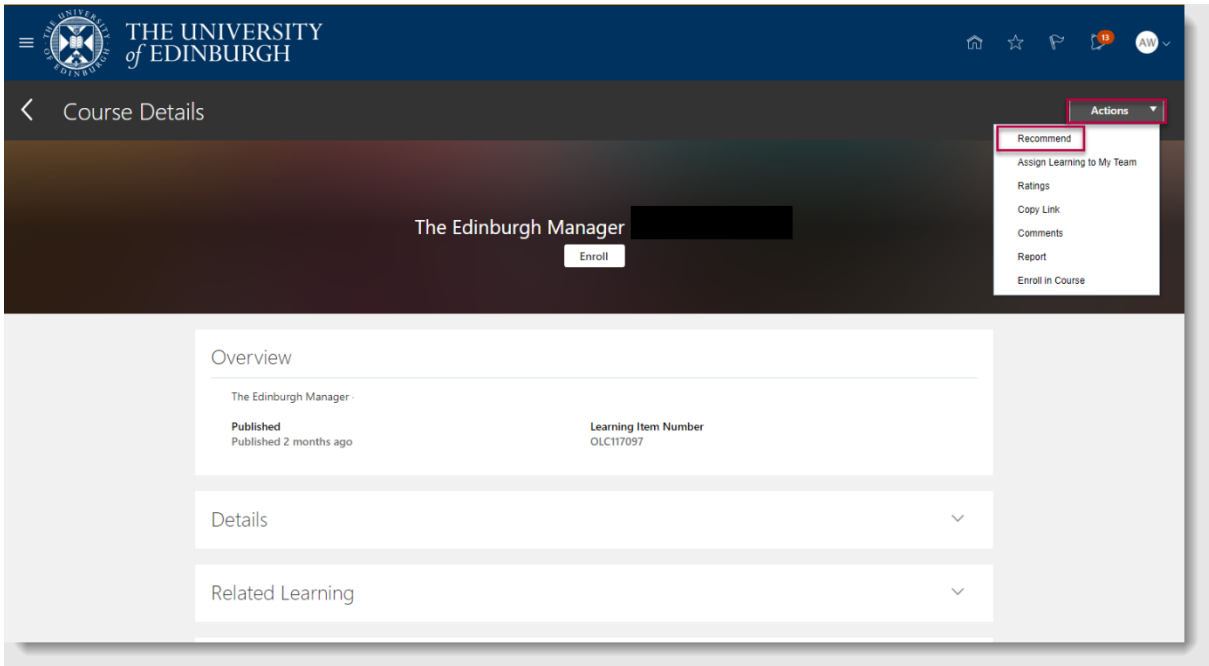
Learner who are assigned learning will get an email and a notification within People and Money. Further details will be in their **What to Learn**.

To see this process in brief click here

Recommend learning

Follow steps 1-4 from Browse the learning catalog.

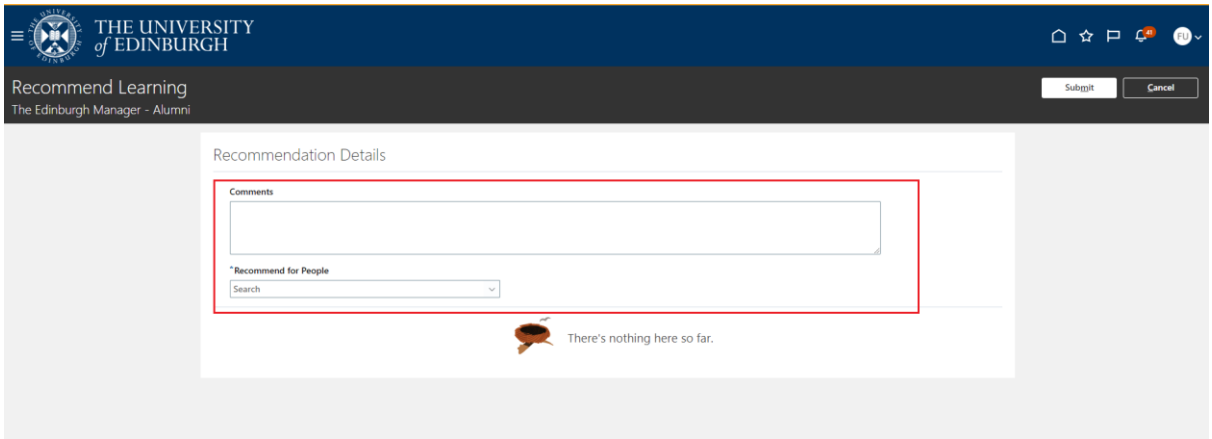
1. From the Course Details page select the **Actions** drop down menu and choose **Recommend**.

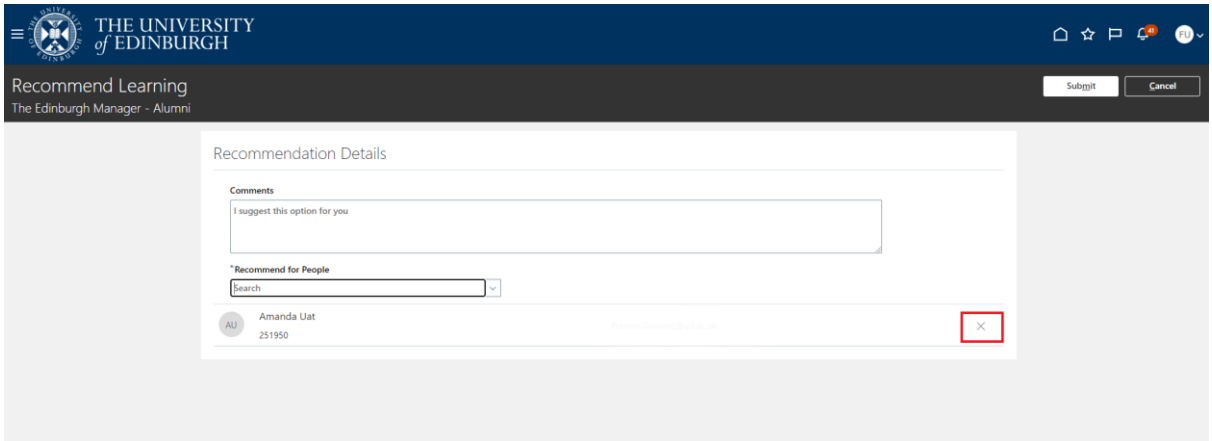


2. Add your comments to the recommendation.

3. Type the name of the person you want to recommend the course to using the search bar. You can remove anyone added in error by selecting the **X** symbol next to their name.

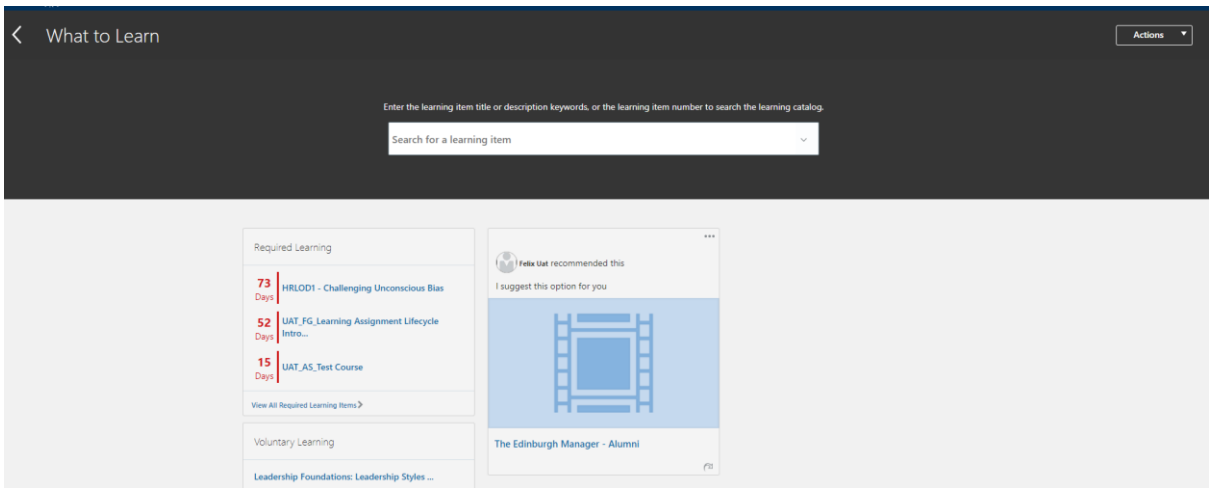
   The search is a link to the University directory so you can send your recommendation to any University employee.





Press **Submit** to complete the recommendation.

NOTE: The person who has been recommended the learning will see the comments and your name in their What to Learn space and will get an email notification.

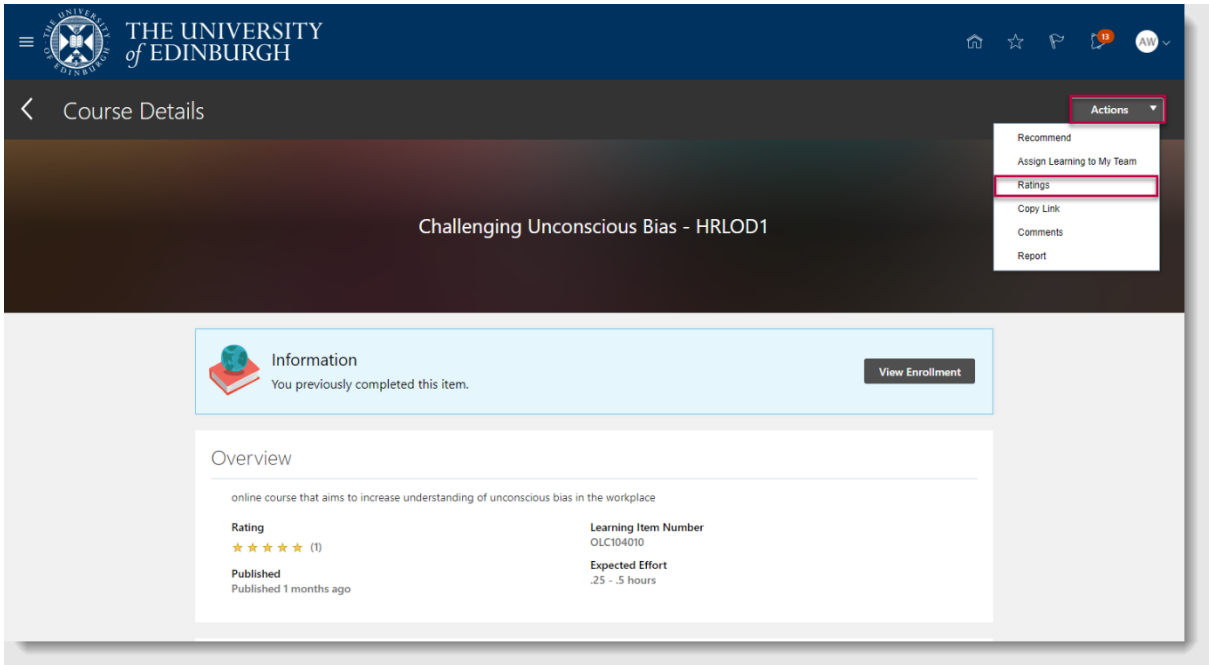


To see this process in brief [click here](#).

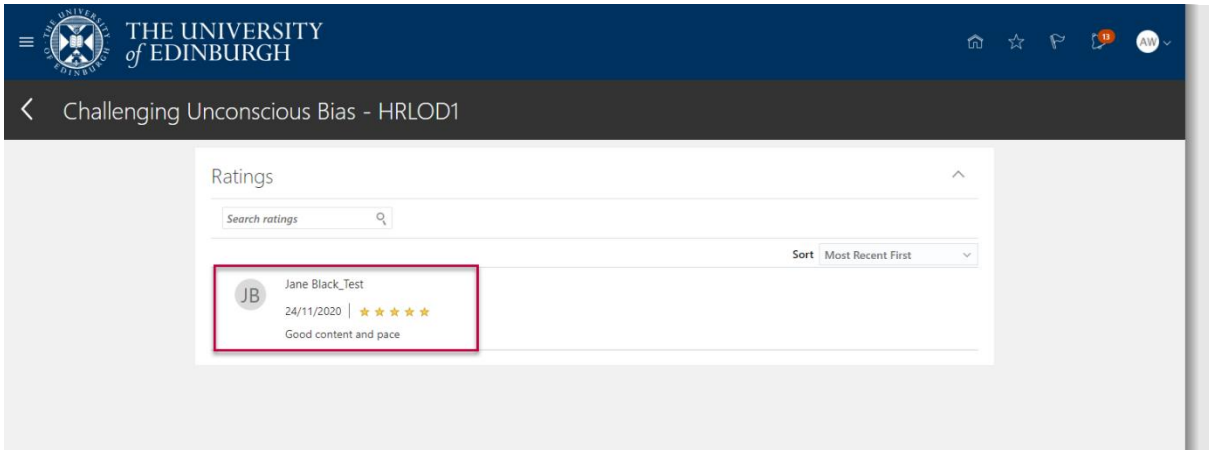
View Ratings

Follow steps 1-4 from Browse the learning catalog.

1. From the Course Details page select the **Actions** drop down menu and choose **Ratings**.



2. The ratings from previous participants is shown on a 5 star scale along with a comment.



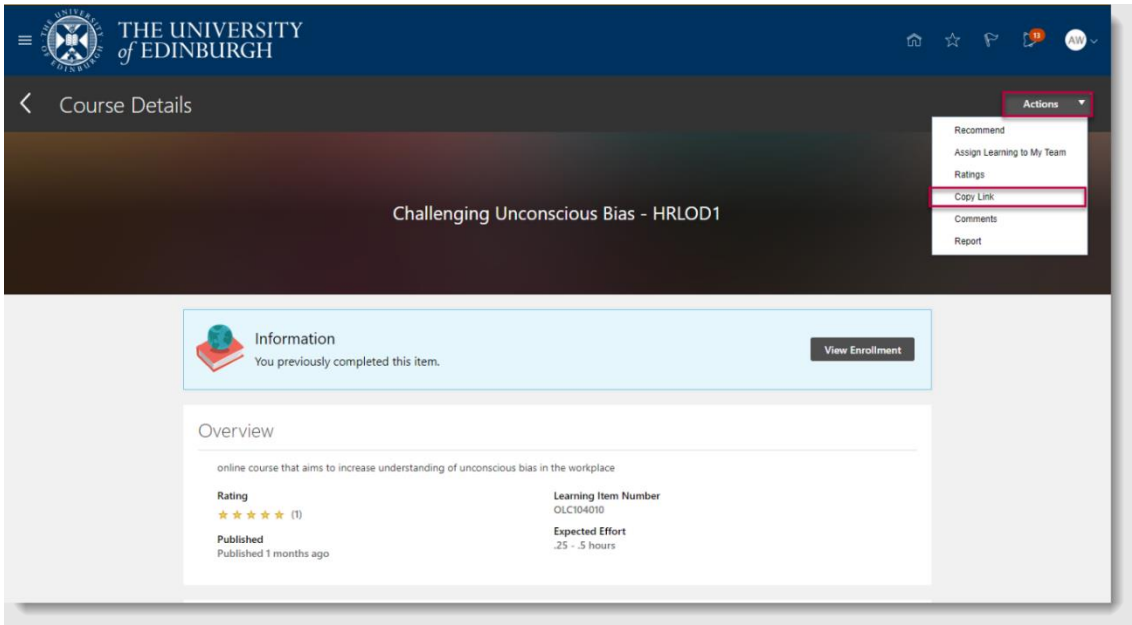
Ratings, in addition to the **Overview** and **Details** section on the Course page, will provide further information on the Learning Item.

To see this process in brief click here.

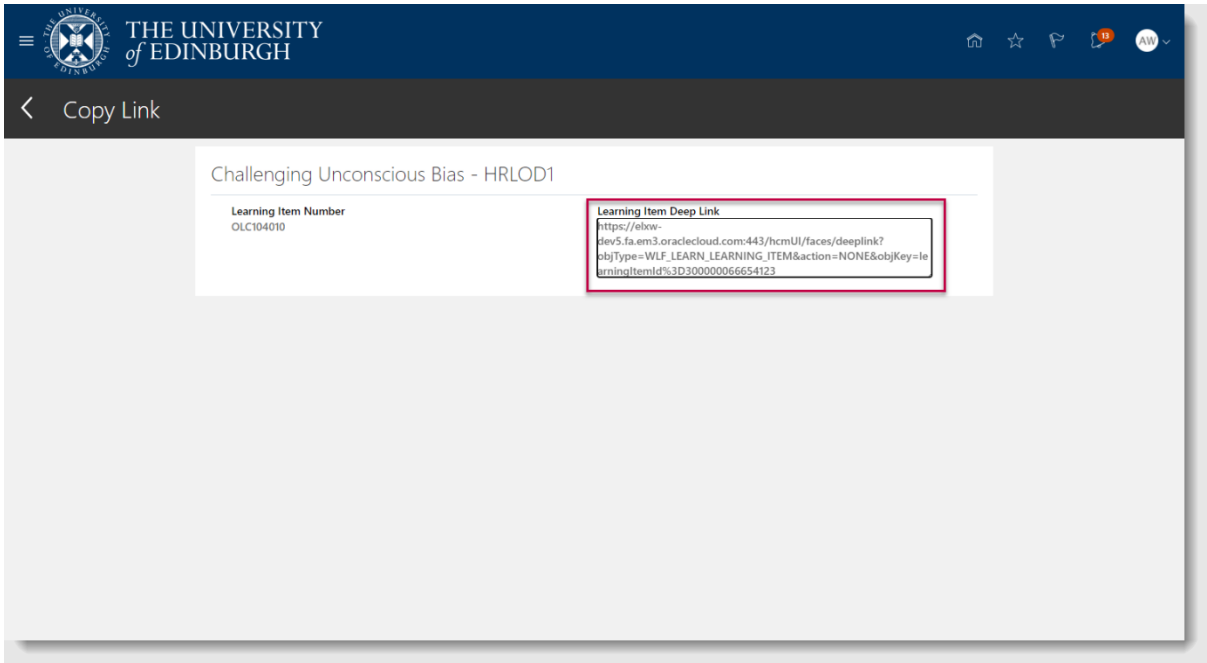
Copy and share links

<u>Follow steps 1-4 from Browse the learning catalog.</u>

1. From the Course Details page select the **Actions** drop down menu and choose **Copy Link.**



2. The unique Learning Item Number will be displayed with the Learning Item Deep Link. Copy and paste the Deep link into a chat or email to allow colleagues/direct reports to be directed the specific course without having to browse the catalogue.



To see this process in brief click here.