People and Money system

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Assumed Knowledge:

1. The 'traditional' line management role has a solid reporting line and they:
   a. Provide professional leadership – setting standards, expected ways of working, ensuring compliance
   b. Facilitate professional development
   c. Lead the setting of objectives and assessment of performance through regular planned and ad hoc 1:1s
   d. Deliver the annual review meeting (with input from any dotted reporting line if applicable)
   e. Approve annual leave and development requests, record and monitor absence levels
   f. Hold the budget for the staff in their area
   Note: A Line manager is not always a budget holder

2. A line manager with 'dotted' line of responsibility provides:
   a. Direction on the business strategy
   b. Direction on operational priorities – which will feed into objectives and are part of assessment of performance through structured ongoing feedback
   c. Ongoing two-way communication and regular business updates through 1:1’s and attendance at meetings
d. Encouragement to challenge/feedback on people/business related issues

3. The dotted line manager appears on the employee’s record but the employee does not appear on the dotted line manager’s ‘My Team’ section ie. they cannot view any assignment info relating to this employee.

4. The Change Manager functionality enables you to change managers of all types, but only one worker at a time.

5. You can only select one person as the new manager. If you try to add more than one, an error message will appear.

6. **Managers can initiate the Change Manager Process for their direct reports only, whereas School/Department Admins can initiate this for anyone in their Area of Responsibility (i.e. their School/Department)**

7. Both Managers and School/Department Admins can add any employee across the University as direct reports –
   a. Managers can only add them to their own team
   b. School/Department Admins can add them to a manager’s team within their Area of Responsibility

8. Both Managers and School/Department Admins can reassign or push direct reports to any other manager in the University via the Change Manager function –
   a. Managers can only do this to employees in their own team
   b. School/Department Admins can do this for employees within their Area of Responsibility

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**In Brief…**

This is a simple overview of the process.

1. From the Dashboard, select the **My Team** section and then select **Show More** under **Quick Actions**

   **Note:** If you’re a School/Department Administrator, please select **My Client Groups** first.

2. In the Employment section, select **Change Manager**
3. In the search box that appears search for the team member whose manager you would like to change or select them from the list of Direct Reports that will be displayed below.

4. In the **When and Why** box, select the:
   - **Date** on which the manager change starts based on the hint provided
   - **Reason** for changing the manager from the dropdown menu

   Then press **Continue**

5. In the **Maintain Managers** box, to change the name of the current manager, click the **pencil icon** against the name of the current manager.

6. Under **Name**, search for the name of the new manager and select their details or press **Delete** to remove the current manager.

7. Click on **OK**

8. Alternatively, click **Add** and then the **Name** dropdown menu
   - **Search** for and select the name of the new manager
   - Click on the **Type** dropdown menu and select the type of manager they’ll be ie. Line Manager or Dotted Line Manager. These are the only manager types available.
   - Click on **OK**

   **Note:** If a system warning appears at this point, either update the type of manager you have just entered or delete the previous manager type which is no longer required.

9. Click **Submit**

For detailed guidance, see the next section.
1. From the Dashboard, select the **My Team** section and then select **Show More** under **Quick Actions**

   ![Dashboard Screenshot]

   **Note:** If you’re a School/Department Administrator, please select **My Client Groups** first.

2. In the Employment section, select **Change Manager**

   ![Employment Screenshot]
3. In the search box that appears **search** for the team member whose manager you would like to change or **select** them from the list of Direct Reports that will be displayed below.

4. In the **When and Why** box, select the:
   
a. **Date** on which the manager change starts based on the hint provided.
b. **Reason** for changing the manager from the dropdown menu

![Image showing the dropdown menu for changing the manager]

**Note:** for all the available Reasons and when to use them, check the [Appendix](#).

5. Then press **Continue**

![Image showing the Continue button after filling out the When and Why section]
5. In the **Maintain Managers** box, to change the name of the current manager, click the **pencil icon** against the name of the current manager.
6. Under **Name**, search for the name of the new manager and select their details or press **Delete**
7. Click on **OK**

8. **Alternatively**, click **+Add** and then the **Name** dropdown menu
a. **Search** for and **select** the name of the new manager

b. Click on the **Type** dropdown menu and select the type of manager they'll be ie. Line Manager or Dotted Line Manager
c. Click on **OK**

![Image of Change Manager interface]

**Note:** If a system warning appears at this point, either **update** the type of manager you have just entered or **delete** the previous manager type which is no longer required.

9. Click **Submit.**

![Image of Change Manager interface after submission]
### Glossary

Please refer to Glossary

### Appendix

<table>
<thead>
<tr>
<th>Action Reason (Why are you changing the manager?)</th>
<th>When to use this reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Temporary Assignment for Manager</td>
<td>The Line Manager's temporary assignment has ended</td>
</tr>
<tr>
<td>New Hire of Manager</td>
<td></td>
</tr>
<tr>
<td>Addition of Employee Work Relationship for Manager</td>
<td></td>
</tr>
<tr>
<td>Change of Location of Manager</td>
<td>The Line Manager will be working from a different location</td>
</tr>
<tr>
<td>Change of Manager of Manager</td>
<td></td>
</tr>
<tr>
<td>Promotion of Manager</td>
<td>The Line Manager has been promoted</td>
</tr>
<tr>
<td>Resignation of Manager</td>
<td>The Line Manager has resigned</td>
</tr>
<tr>
<td>Temporary Assignment of Manager</td>
<td></td>
</tr>
<tr>
<td>Transfer of Manager</td>
<td>The Line Manager has been transferred to a new post</td>
</tr>
<tr>
<td>Addition of Assignment for Manager</td>
<td></td>
</tr>
<tr>
<td>End of Assignment for Manager</td>
<td>The Line Manager's Assignment has ended</td>
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</tbody>
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