People and Money system

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Line Manager Guide- How to Change Direct Reports

Line manager/School or Department Admin

Estimated time to complete: 12 minutes

Assumed Knowledge:

1. The Manage Direct Reports functionality enables you to reassign all the direct reports of a manager to new managers in a single process.

2. Managers can initiate the Change Direct Report Process for their direct reports only whereas School/Department Admins can initiate this for anyone in their Area of Responsibility (ie. their School/Department)

3. 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

4. Both Managers and School/Department Admins can reassign or push direct reports to any other manager in the University via the Change Direct Reports 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
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 Direct Reports

3. In the search box that appears search for the team member whose direct reports 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 change starts based on the hint provided
   b. Relevant Reason for making these changes from the Why are you making these changes? dropdown menu

   Then press Continue

5. The Reassigning of Reports box should be available if the employee you have selected has any direct reports. Check the boxes against all or any of the direct reports you would like to reassign to a new (proposed) manager as a result of these changes. Then, Search for the proposed manager and press Continue

6. In the Add Direct Reports box, search for people to add as new reports to the employee and then press Continue

7. In the Comments and Attachments section, fill in any relevant comments and upload attachments where required

8. Hit 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**

**Note:** If you’re a School/Department Administrator, please select **My Client Groups** first.
2. In the Employment section, select **Direct Reports**

3. In the search box that appears **search** for the team member whose direct reports 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 change starts based on the hint provided

   ![Image](image1.png)

   b. Relevant **Reason** for making these changes from the **Why are you making these changes?** dropdown menu

   ![Image](image2.png)
Note: For all the available Reasons and when to use them, check the appendix.

5. Then press Continue

6. The Reassigning of Reports box should be available if the employee you have selected has any direct reports. Check the boxes against all or any of the direct reports you would like to reassign to a new manager as a result of these changes. Then, Search for the proposed manager and press Continue.
7. In the **Add Direct Reports** box, search for people to add as reports and then press **Continue**
8. In the **Comments and Attachments** section, fill in any relevant comments and upload attachments where required

9. Hit **Submit**.
<table>
<thead>
<tr>
<th>Action Reason (Why are you changing the Direct Report(s)?)</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>
</tr>
</tbody>
</table>