People and Money: Learning

Manager: How to manage team learning

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Contents

PM-3228 –March 2025 (25A)

Introduction

This guide covers key tasks for managers in People and Money: Learning - a one-stop-shop for staff learning at the University.

There are hundreds of learning opportunities (courses) available to you, and your team members.

Some are expected of you in your role and may be assigned to you, and others are available for you to enrol on, or for your manager to enrol you on, and for you to enrol team members on.

Courses may be instructor-led in a classroom, be delivered virtually using e.g. Teams, or be self-paced eLearning that you complete independently.

Remember that People and Money offers access to learning opportunities, but it does not replace the requirement for ongoing and meaningful conversations. Learning aims should be discussed with your team member(s) and agreed in advance of enrolment. This may occur as part of their annual review or during your ongoing one to one conversations. Further information to support you is available in the Conversations Hub.

Before you start, please familiarise yourself with the Guide to Learning, Skills and Qualifications for Line Managers

Line managers 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

My Team> Learning enables managers to:

- Search the catalogue to review learning options for their direct reports
- View learning enrolment records of your direct reports and their direct reports and export their search results
- Download the data relating to learning enrolments for their direct reports and all employees in their reporting line.
- Assign learning to your team, and other teams in your organisation hierarchy
- Recommend learning to your team, or outside of your line management structure
- Find more information on Learning

This guide covers these processes.

Line Managers should also review the Guide to Skills and Qualifications.

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

View team enrolments

1. From the home page navigate to My Team then Learning.
2. Select My Team from the lower left of screen.
3. Use the filters to refine your search, if desired

View/Edit a team members' current enrolments

1. Select the relevant team member to view their learning engagement
2. Use the filters to refine your search, if desired
3. Select the "arrow" icon to email a reminder to your report about an enrolment
4. Select the "eye" icon to the right of each line of information to see more detail
5. From the details screen, select Actions for more options on this enrolment

Switch team

1. On the Team Learning screen, choose Switch Team from top right of screen
2. This will display a list of people managers in your team
3. Select the relevant manager to display their team members learning records
4. Navigate through your hierarchy of reporting to view other managers team learning records

Use reporting tools in Team Learning

1. On the Team Learning screen, choose Actions> Download options to download data relevant to your direct reports or organisation (all employees in your reporting line)

And/or

2. Use filters to refine a search to your criteria and select the export button to download the data that is on the screen at the time you select export

Search the catalogue of learning

1. From the home page navigate to My Team then Learning.
2. Select Search from the lower left of screen.
3. Enter a key word into the Search bar, and/or use the filters to refine your search.
4. From the results select the course title to Learn More or Assign to My Team.

Assign learning to your team

1. Use Search to find the learning item you'd like to assign and select it to expose more information.

2. Choose the option **Assign to My Team**.
3. Complete the **Assignment Details** section
    a. Assignment type
    b. Start date
    c. Due Date
    d. Choose Selection Type and Learners, and add a note
4. Select **Assign**.

Recommend learning

1. Use Search to find the learning item you'd like to assign and select it to expose more information.
2. Choose the option **Learn More**
3. Review Rating if you wish to
4. Select the **Actions** button and choose the option **Recommend**
5. Search for the person you want to recommend it to - add a comment if you wish - and select **Submit**.

Copy links

1. Use Search to find the learning item you'd like to share a link to and select it to expose more information.
2. Choose the option **Learn More**
3. Select the Actions button and choose the option **Copy Link**
4. The link will be copied to your computer clipboard for onward use

Record external learning

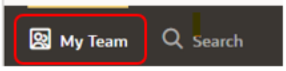
1. From the Team Learning screen, choose **Actions** then **Record External Learning**
2. Complete the following minimum information
    a. Start date & completion date
    b. Learning item title and description
3. Add Learners, with a note if desired
4. Select **Record**

In Detail

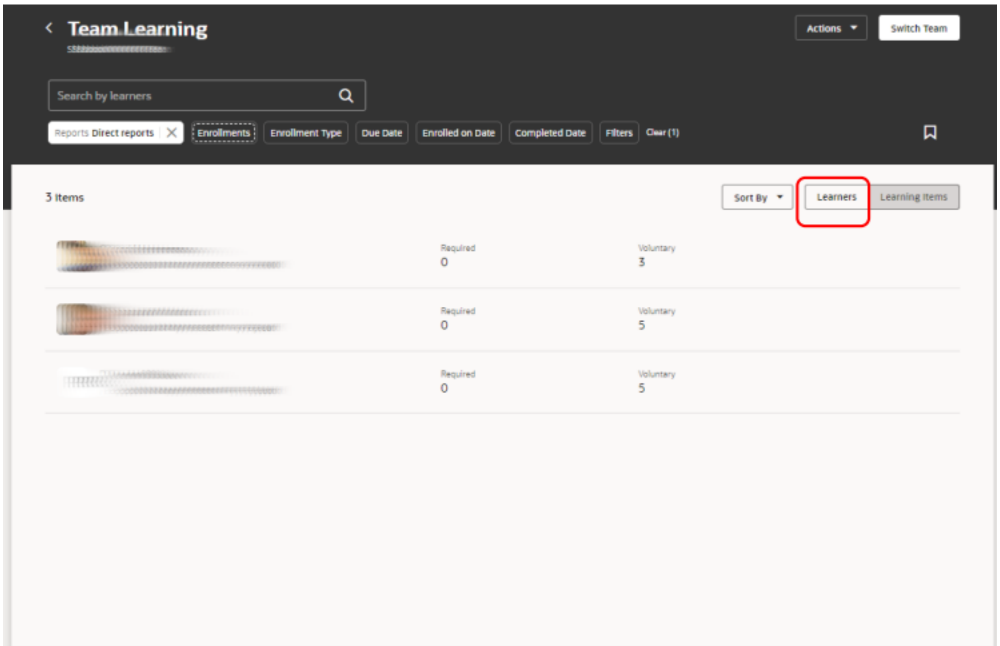
View team enrolments

View by Learners

1. From the home page navigate to My Team then Learning.
2. Select My Team from the lower left of screen (if it's not already selected).

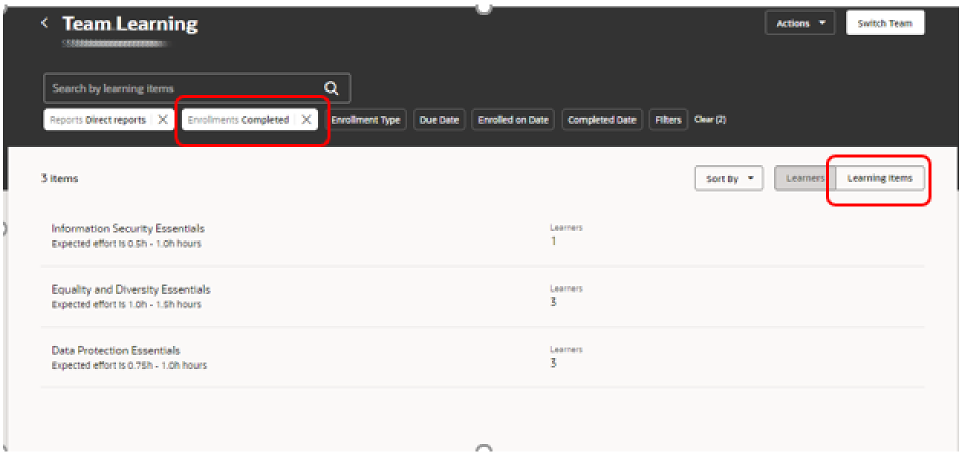


3. Use the filters to refine your search, if desired. You can combine multiple filters and clear them. You can switch order of presentation by using Sort By.
4. NOTE: if some of your team members do not yet have enrolments on Learning, they will not appear on this list.



View by Learning Items

1. Select Learning Items to change the view to focus on courses. This example shows an additional filter for Enrolments: Completed

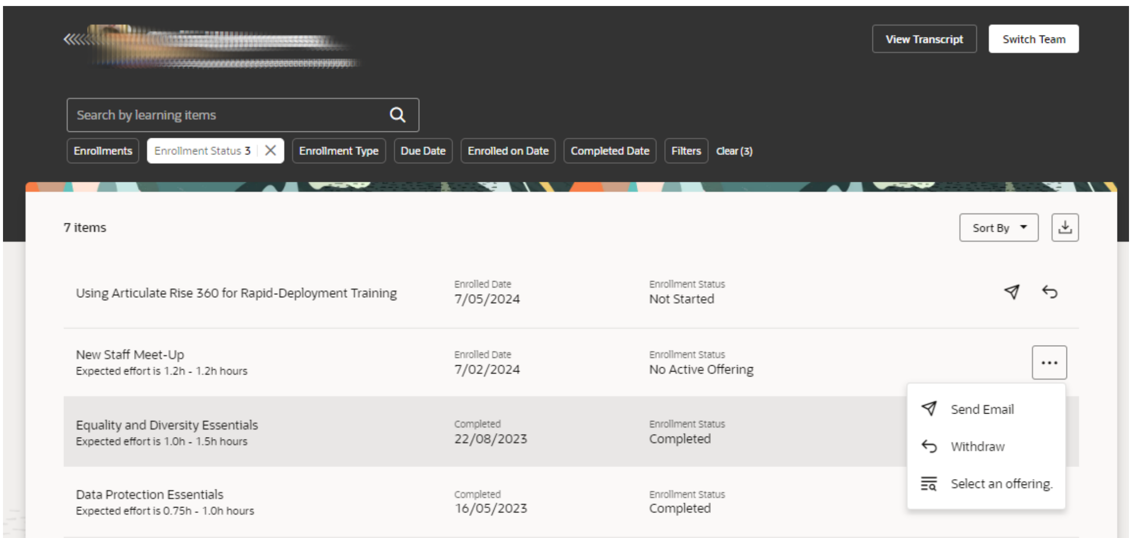


View/Edit a team members' current enrolments

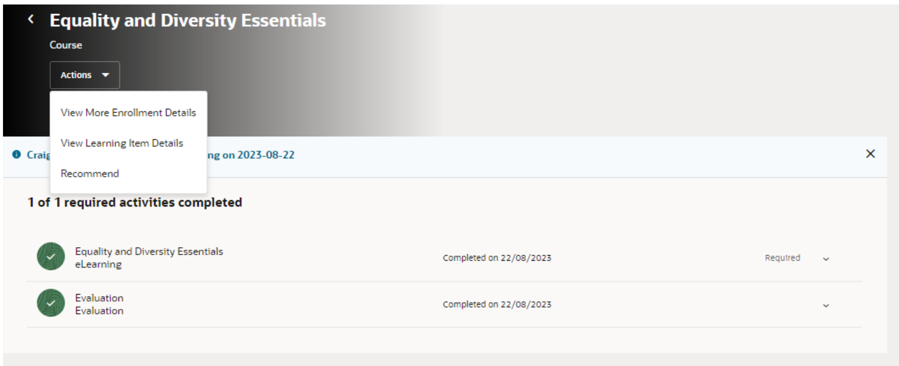
1. Select the relevant team member from your My Team screen to view their learning engagement in more detail
2. Use the filters to refine your search, if desired.

Tips:

- The actions available for each enrolment are context sensitive
- You can see actions/options on learning items with a pre-completed status. (No Offering Selected, Not Started or In Progress) as there is no need for actions on a Completed enrolment
- In the example below you can see for the top enrolment direct access to the email arrow, and the withdraw icon, and in the 2nd enrolment, the ellipsis is selected to see all available actions for that enrolment.

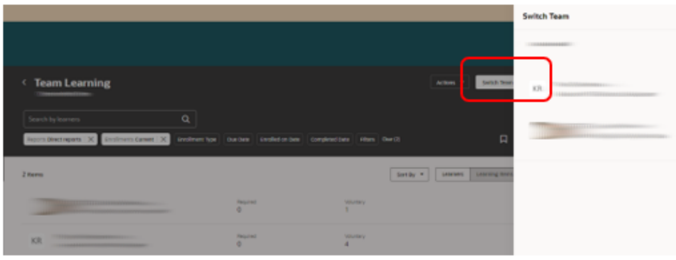


- Selecting an individual enrolment allows you to see more detail on the team members' engagement with that course.
- In this example we can see one required activity (the course title) has been completed and one optional activity (the evaluation).
- Use the **Actions** button to show more detail, if required.



Switch team

1. On the Team Learning screen, choose Switch Team from top right of screen
2. This will display a list of people managers in your team on the right
3. Select the relevant manager to display their team members learning records



Tips:

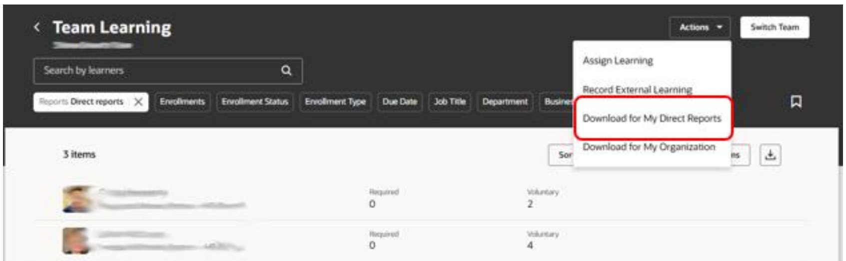
- From the Team Learning screen you can use Switch Team again to explore learning activity in your direct reports' team
- Using Switch Team again, you can explore learning activity in your organisational hierarchy.

Use reporting tools in Team Learning

There are 2 ways to retrieve data from My Team> Learning depending on your requirements.

Actions>Download

Choose Actions> Download options to download enrolment data relevant to your direct reports or organisation (all employees in your reporting line).



Tips:

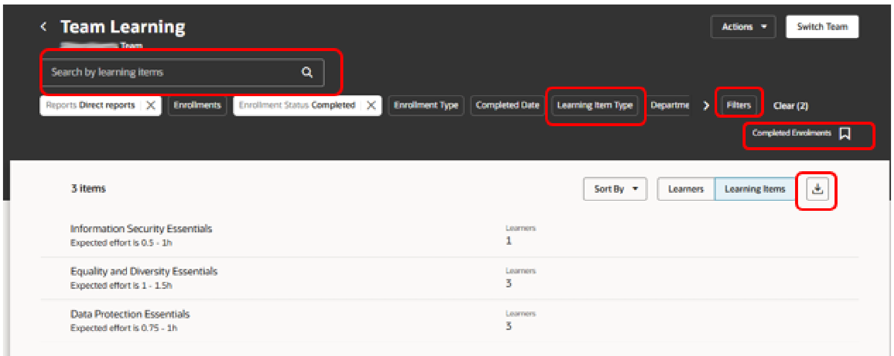
- The download can present up to 10,000 lines of data
- Please ensure that any downloaded reports are stored in accordance with the University's [Data Protection | Data Protection] and [Records Management | Data Protection] guidance.

- Some numeric data relating to learning assignment used in the background of People and Money is displayed as “general” format in Excel. If you need to see this data, simply change these columns to number format
- If an employee does not have an enrolment on at least one course, there will be no data to report. Typically, Guaranteed Hours, Casual staff and Contingent Workers are not auto enrolled.

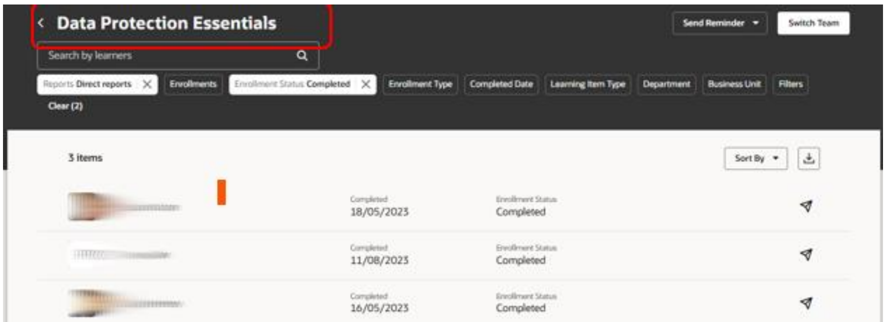
Using filters

Use filters to refine a search to your criteria and select the export button  to download the data that is on the screen at the time you select export.

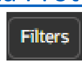
The following example of a search shows a combination of 2 filters (Reports = Direct, and Enrolment Status = Completed) with the Learning Items view enabled so that the manager can see the detail of learning items their team have completed. The manager has saved this search for future use.



From this screen, selecting a course title you are interested in will show the data relating to your teams’ enrolments.

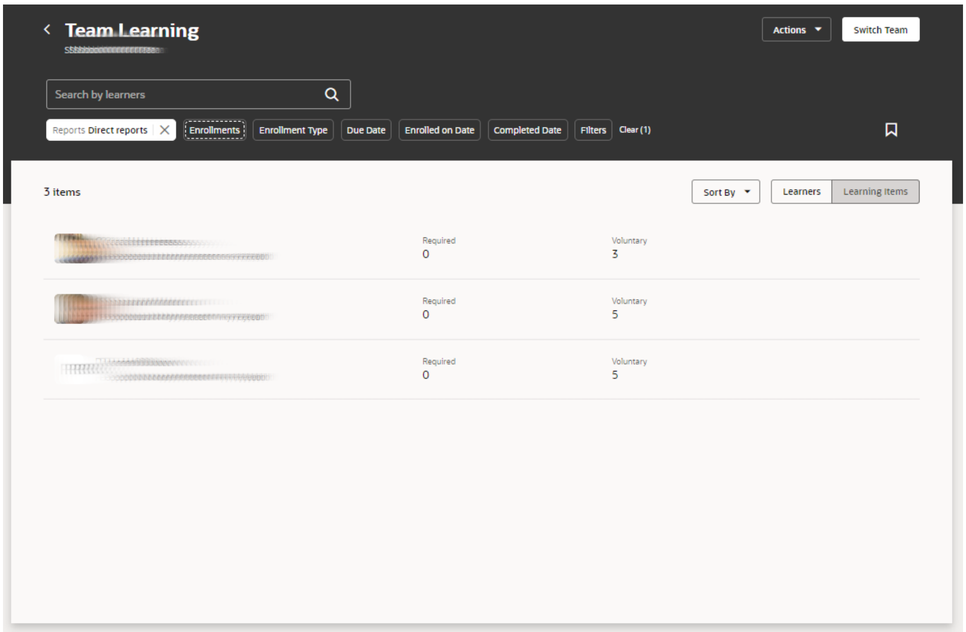


Tips:

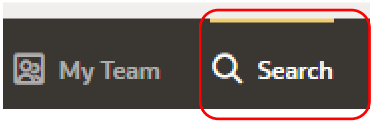
- You can use the bookmark icon to create and save a search for future use
- Exporting from this type of search will show only the on-screen data in the downloaded file
- Please ensure that any downloaded reports are stored in accordance with the University’s [Data Protection | Data Protection] and [Records Management | Data Protection] guidance.
- There are many more filters available – accessed by selecting 

Search the catalogue of learning

1. From the home page navigate to **My Team** then **Learning**.

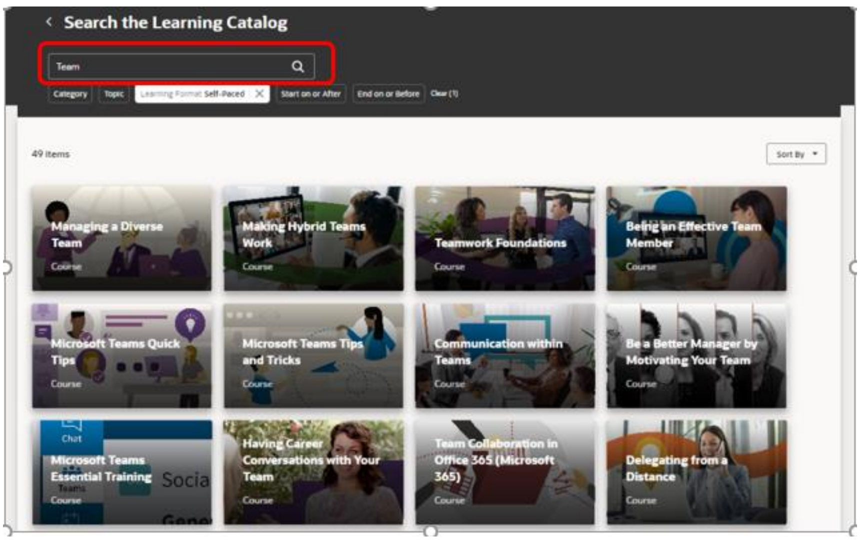


2. Select **Search** from the lower left of screen.

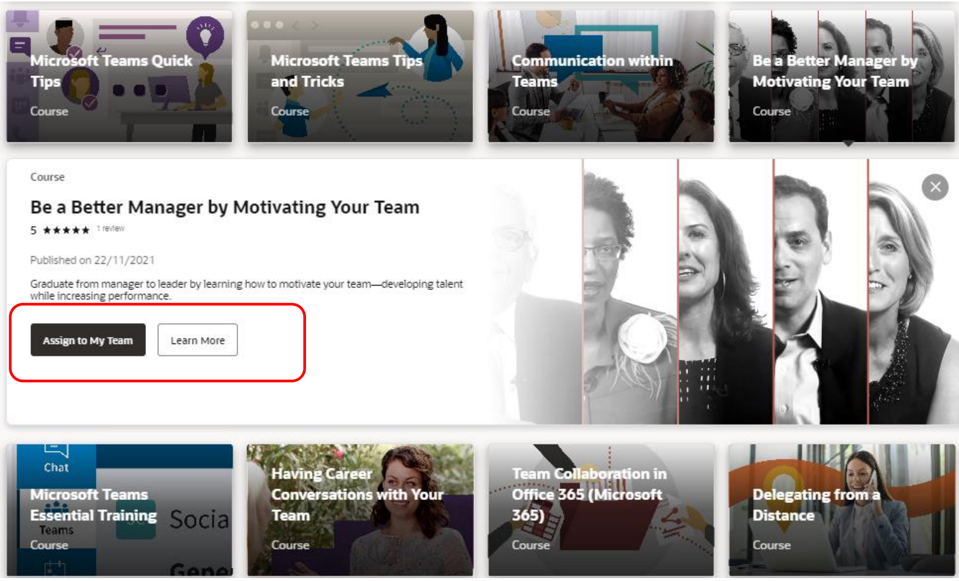


3. Enter a key word into the **Search bar** and select the magnifying glass to search. and/or use the filters to refine your search. You can combine filters and use the **Clear** function to remove

   An example search result for the keyword <u>Team</u>, filtered to show only Self-paced learning is shown below.

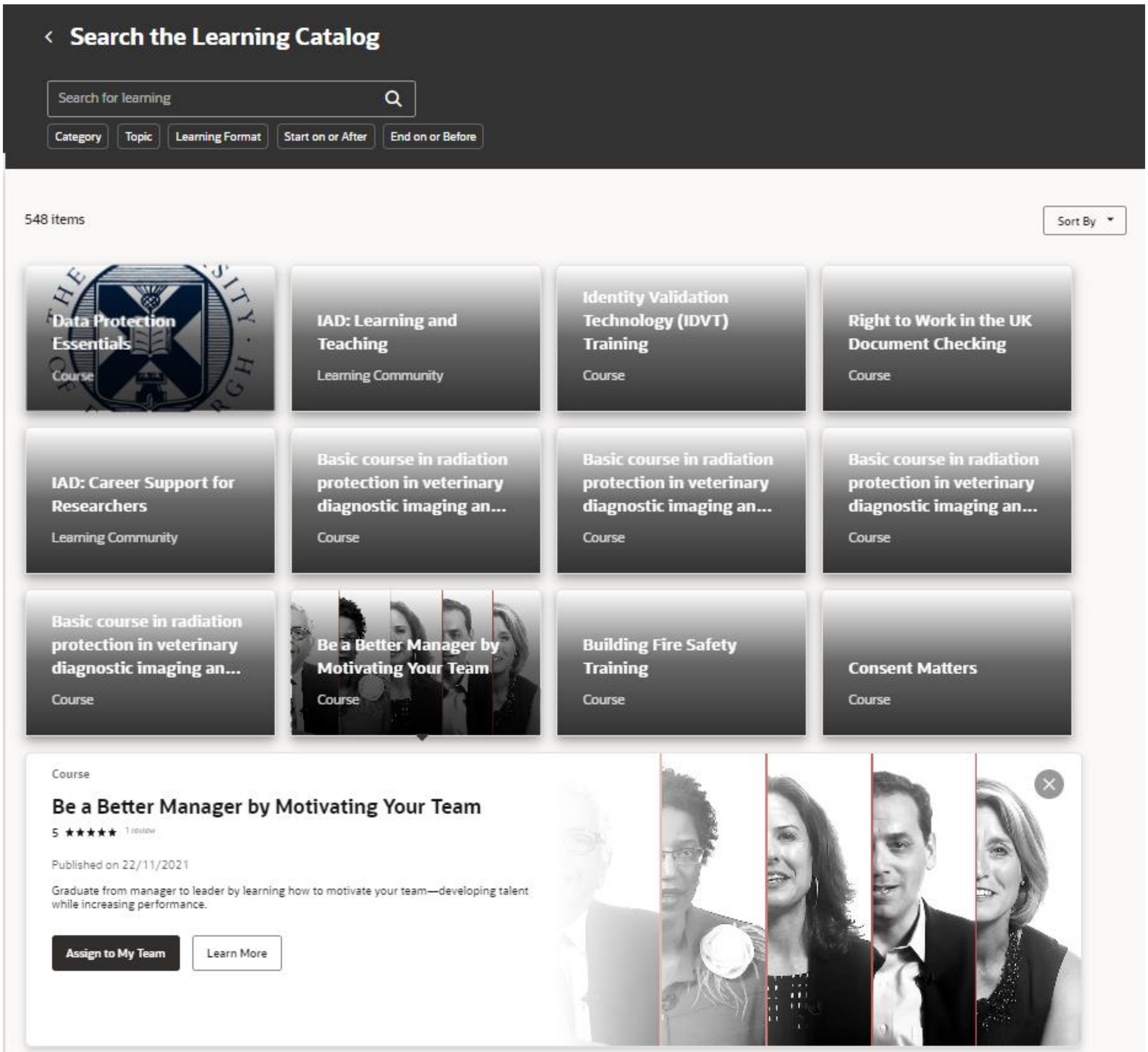


4. From the results click on the course title, to open a card with more information, where you can **Learn More** (see more details) or **Assign to My Team**.



Assign learning to your team

1. Use **Search** from bottom left of screen to find the learning item you'd like to assign and select it to show more information



2. Choose the option **Assign to My Team** to display the following screen

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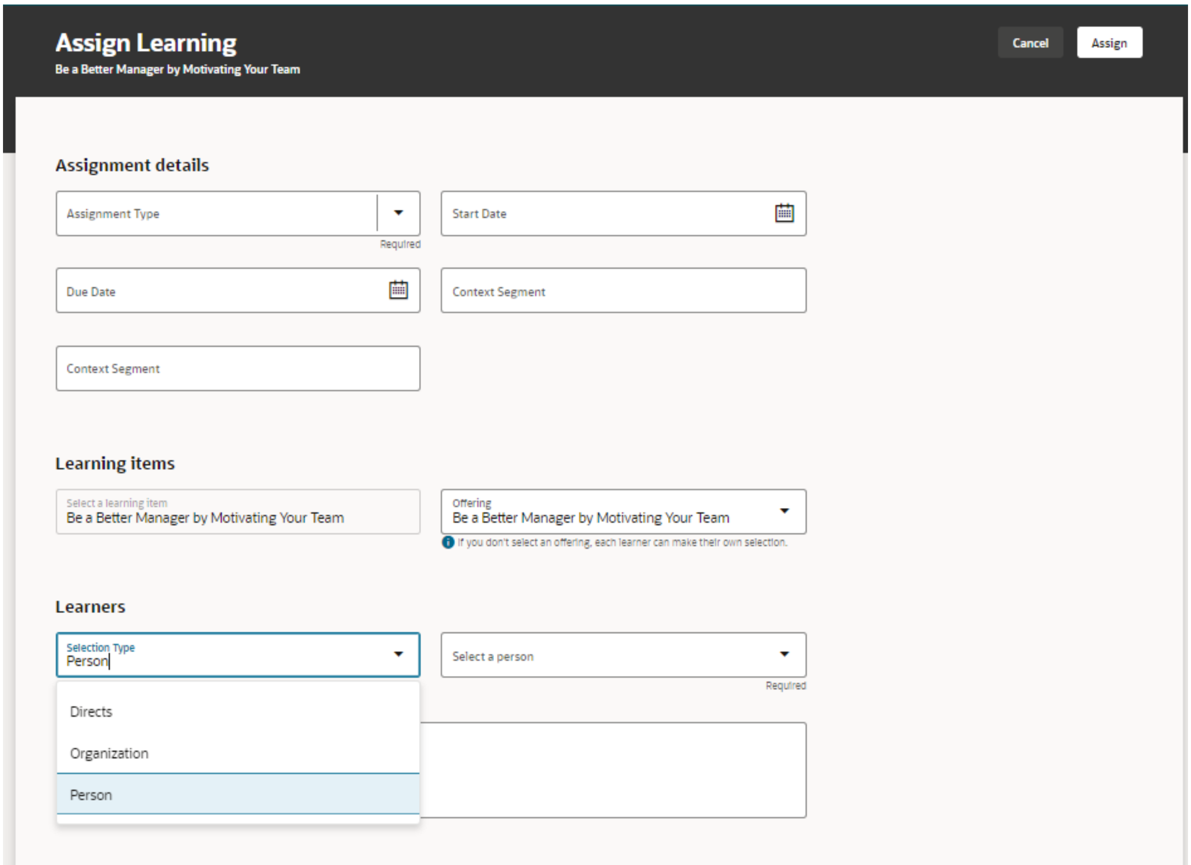


3. Complete the **Assign Learning** information
   a. Assignment type
      i. Voluntary – the assignee(s) can choose whether they enrol or withdraw
      ii. Required – the assignee cannot withdraw
   b. Start date – select today's date
   c. Due Date – select a future date
   d. Context segment fields should be left blank
4. Select a **Learning Item**
   a. type in a title or topic here to search available courses
   b. select the offering title if you'd like to assign a specific offering
5. Choose Learners, by selecting the appropriate information
   a. Selection types available are
      i. Person – to assign to an individual
      ii. Directs – to assign to the direct reports of a manager in your hierarchy
         1. **Tip**: use this to assign to your own direct reports by choosing your own name in Select a person
         2. Organization – assign learning to all employees in your hierarchy
6. Add a Note to Learners, if required
7. Justification field should be left blank

8. Select **Assign** from top left of screen. Once assigned you will be returned to your previous screen, and your team member will receive an email notification and bell icon about this assignment.

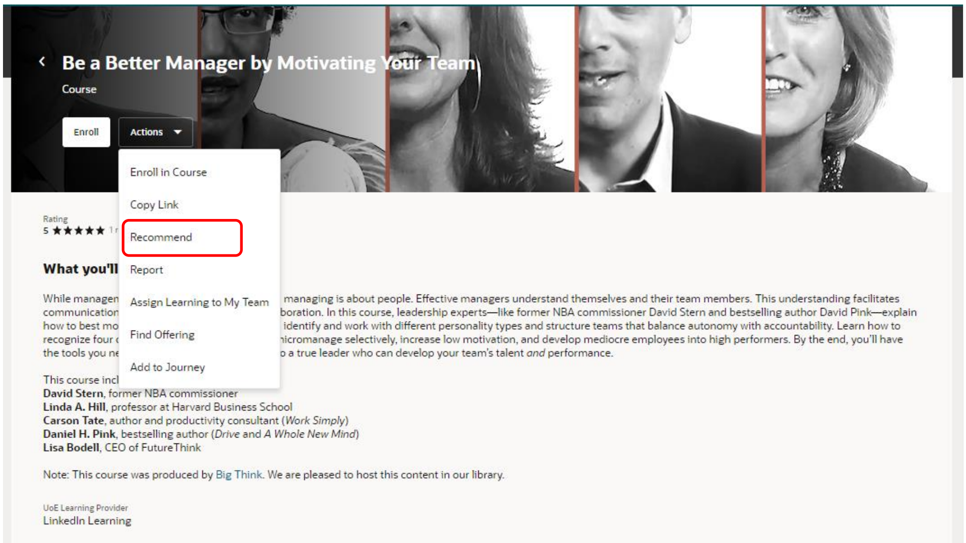
    Tips:

    You can also Assign Learning from My Team> Learning> Actions> Assign Learning

    If you have additional security roles in People and Money, this will affect the contents of "select a person" available to you when choosing Person, Directs or Organisation.

Recommend learning

1. Use Search to find the learning item you'd like to assign and select it to expose more information.
2. Choose the option **Learn More** to show the screen below
3. Select the **Actions** button and choose the option **Recommend**



4. Add Comments
5. Search for the **Learners(s)** you want to recommend it to by using the +Add button. You can add multiple people to a recommendation.

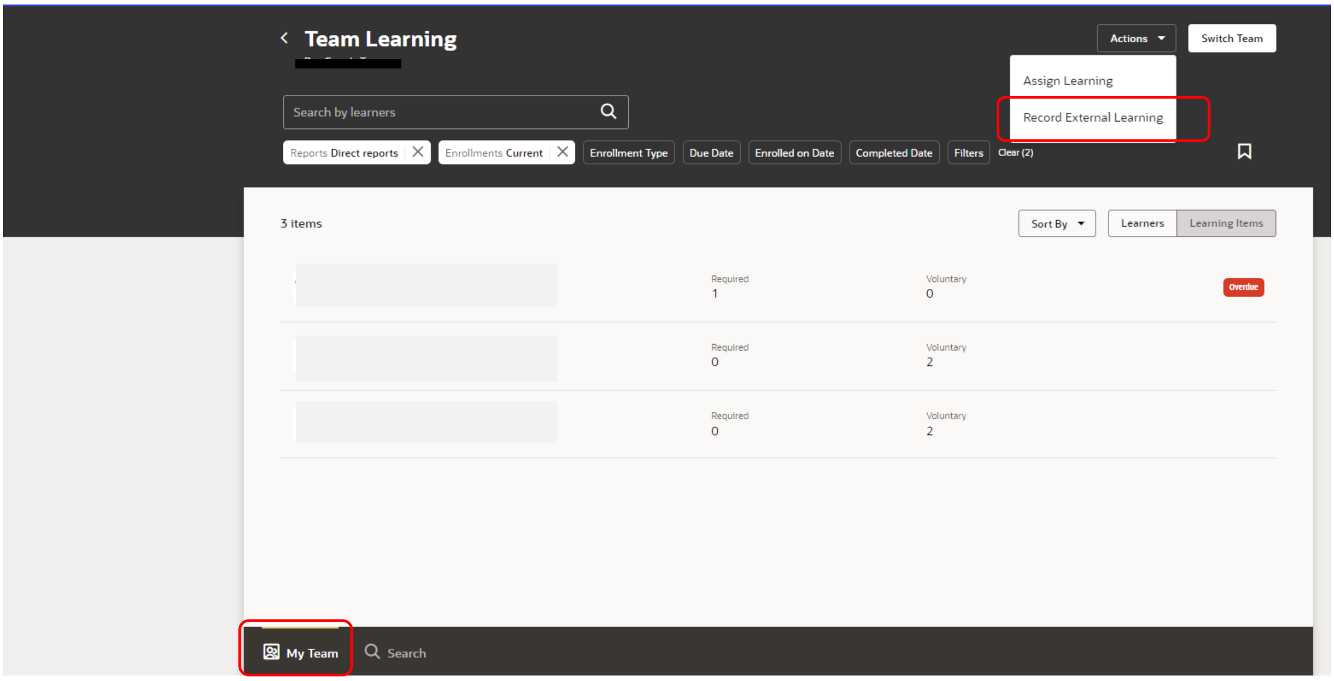
6. Select **Recommend from top right of screen**

Copy links

1. Use **Search** to find the learning item you'd like to share a link to and select it to expose more information.
2. Choose the option **Learn More**
3. Select the Actions button and choose the option **Copy Link**
4. The link will be copied to your computer clipboard for onward use

Record external learning

1. From the Team Learning screen, choose **Actions** then **Record External Learning**



2. Complete the following information
    a. Start date & completion date

b. Learning item title and description
c. Add Learners, with a note if desired. You can add multiple people here, if required.
d. There is no need to populate the Context Segments or Justification fields.
e. Select **Record** from top right of screen