



## System User Guide

# How to Change Manager

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## Introduction

This guide covers key tasks for **Line Managers** and **School/Department Administrators** in 'How to change manager' system process.

### 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, i.e. 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 and indirect 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
9. **Please do not leave any employees without a line manager.** If you do, the system will look like it has accepted this change but in the background, **it will cause an error**, which will require specialist help to be resolved.
10. **Please consider the order in which you make complicated changes** involving a group of managers. Loops may be created in the system hierarchy **which will cause errors** and will not allow any actions to be taken until a specialist resolves. An example of this kind of change would be:
- a. Trying to change A's manager from B to C (when C already reports to A), and then trying to change C's manager from A to B. In this instance, if the second change is made first, you can avoid creating a loop (error).

## In Brief

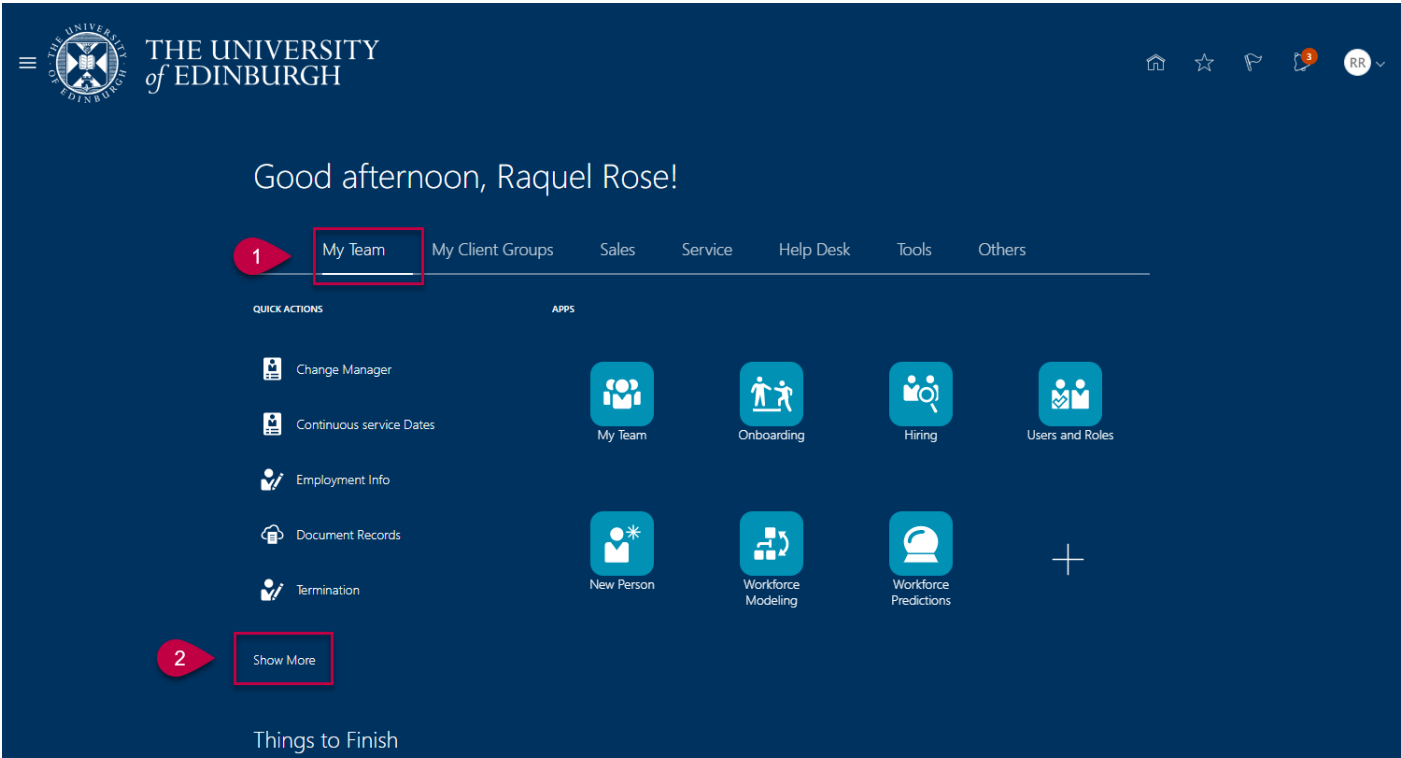
This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

1. From the Dashboard, select **My Team** and then select **Show More** under **Quick Actions**.  
**Note:** School/Department Admins should select **My Client Groups**.
2. In the Employment section, select **Change Manager**.
3. Populate the search bar with their **Name, Person Number** or **Assignment Number**.
4. In the **When and Why** box, select the:
  - a. **Date** on which the manager change starts.
  - b. **Reason** for changing the manager from the dropdown menu.
5. Click **Continue**.
6. In the **Managers** section, to change the name of the current manager click the **pencil icon** against the name of the current manager.
7. Under **Managers**, **search** for the name of the new manager and **select** their details or press **Delete** to remove the current manager.
8. Click **Save**.
9. Alternatively, click **+Add**.
  - a. **Search** for and **select** the name of the new manager.
  - b. Click on the **Manager Type** dropdown menu and select the type of manager they'll be.
  - c. Click **Save**.  
**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.
10. Click **Continue**.
11. If relevant, add in any **Comments and Attachments**. Then press **Submit**.

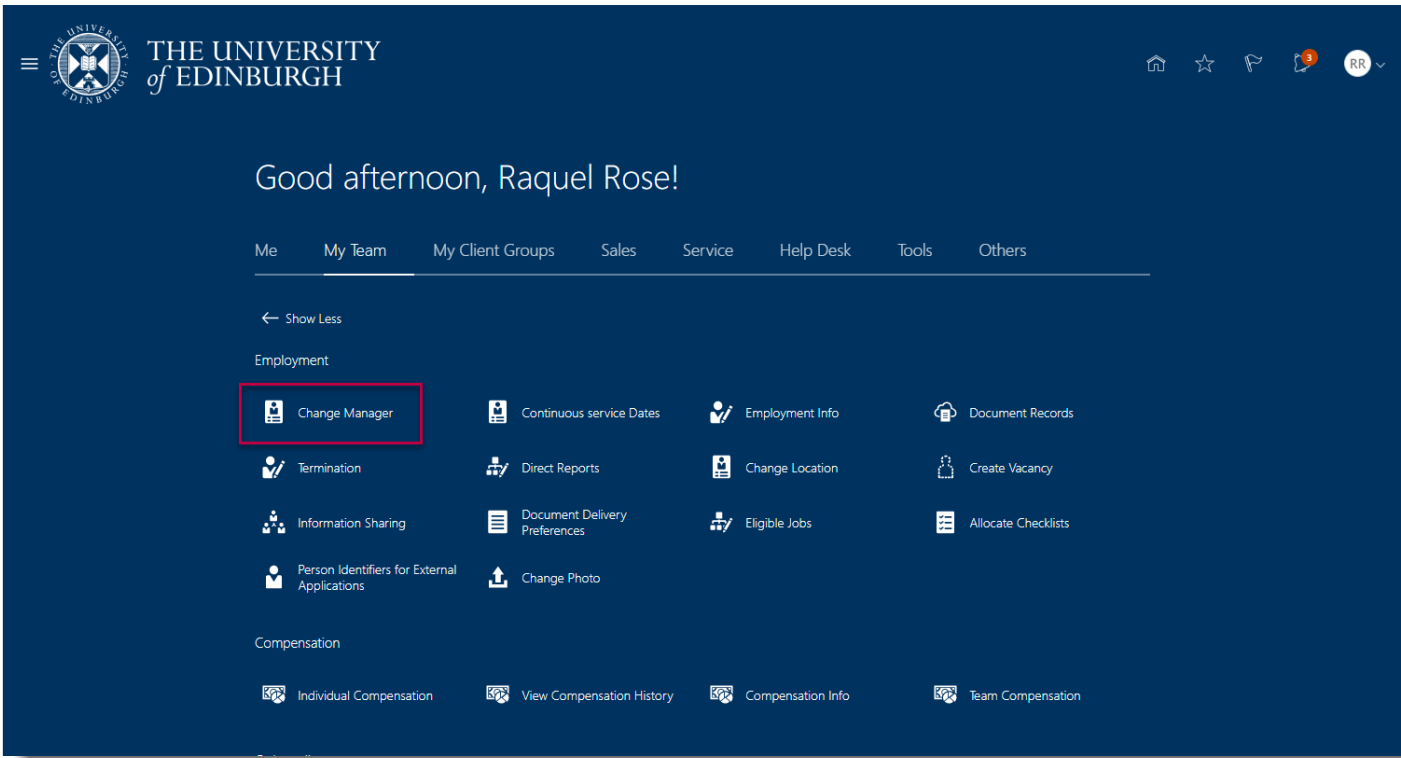
# In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

- 1. From the Dashboard, select **My Team** and then select **Show More** under **Quick Actions**.  
**Note:** School/Department Admins should select **My Client Groups**.



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



3. Populate the search bar with their **Name, Person Number** or **Assignment Number**. Alternatively, select from the list below the search bar.

If the employee holds multiple assignments, all numbers will appear in the search but you can use the filters to locate the correct record to update.

The screenshot shows the 'Change Manager' interface. At the top, there is a search bar with the placeholder text 'Search by name, person number, or assignment number'. Below the search bar, there are several filters: 'Reports Direct reports', 'Assignment Status', 'Manager Type', 'Show primary assignment only', 'Worker Type', 'Filters', and 'Clear (1)'. Below the filters, there is a table with the following columns: 'Name', 'Personal Job Title', 'Person Number', 'Assignment Number', 'Assignment Status', 'Worker Type', and 'Work Email'. The table contains three rows of data, all with 'Active - Payroll Eligible' status and 'Employee' worker type. The table is sorted by 'Relevance'.

4. In the **When and Why** box, select the:
- a. **Date** on which the manager changes.

The screenshot shows the 'When and why' box in the 'Change Manager' interface. The box is titled 'When and why' and contains two main sections. The first section is 'When does the manager change start?' and features a calendar for July 2025. The date '1' is highlighted. The second section is 'What's the way to change the manager?' and contains a dropdown menu. At the bottom of the box, there are three buttons: 'Cancel', 'Continue', and 'Submit'.

- b. **Reason** for changing the manager from the dropdown menu.
- Note:** for all the available reasons and when to use them, check the [Appendix](#).

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Change Manager

1 | 3

When and why

When does the manager change start?  
1/07/2025

Why are you changing the manager?

Action Reason

Action Reason Code

Addition of Assignment for ManagerMANAGER\_ADD\_ASSIGN

Addition of Employee Work Relationship for ManagerMANAGER\_HIRE\_ADD\_WORK\_RELATION

Change of Location of ManagerMANAGER\_LOCATION\_CHANGE

Change of Manager of ManagerMANAGER\_MANAGER\_CHANGE

End of Assignment for ManagerMANAGER\_END\_ASG

Cancel

Continue

Submit

When and why

Managers

## Tips:

- If an individual has a future dated assignment you will receive a warning message at the top. If the change is to continue **beyond** the date shown in the message, you will need to submit change the again.

Change Manager

1 | 3

CW

When and why

⚠ This employee has a future-dated change

×

The start date change will be applied until the closest future assignment change start date of 1/09/2025.

When does the manager change start?  
Required

What's the way to change the manager?

Why are you changing the manager?

Cancel

Continue

Submit

When and why

Managers

5. Click **Continue**.

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Change Manager

When and why

When does the manager change start?  
1/07/2025

Why are you changing the manager?  
New Hire of Manager

Cancel Continue Submit

1 | 3

When and why

Managers

6. In the **Managers** section, to change the name of the current manager click the pencil icon against the name.

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Change Manager

Managers

+ Add

Line Manager

ACTIVE

Manager Type

Cancel Continue Submit

2 | 3

When and why

Managers

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

Change Manager

### Managers

+ Add

Managers

Manager Type  
Line Manager

ACTIVE

ACTIVE

ACTIVE

ACTIVE

ACTIVE

Cancel Continue Submit

2 | 3

When and why

Managers

Change Manager

### Managers

+ Add

Managers

Manager Type  
Line Manager

Cancel Delete Save

2 | 3

When and why

Managers

**Notes:**

- All employees must have a line manager.
- You can only select one person as the new manager. If you try to add more than one, an error message will appear.



8. Click **Save**.

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Change Manager

Managers

+ Add

Managers

Manager Type  
Line Manager

Cancel Delete **Save**

2 | 3

When and why

Managers

Cancel Continue Submit

9. Alternatively, click **+Add**.

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Change Manager

Managers

**+ Add**

ACTIVE

Manager Type  
Line Manager

2 | 3

When and why

Managers

Cancel Continue Submit

- a. **Search** for and **select** the name of the new manager.

The screenshot shows the 'Change Manager' form in the University of Edinburgh system. The form is titled 'Change Manager' and 'Managers'. It features a '+ Add' button and a 'Managers' dropdown menu, which is highlighted with a red box. To the right of the 'Managers' dropdown is a 'Manager Type' dropdown menu. Below these fields are 'Cancel' and 'Save' buttons. At the bottom of the form, there is a 'Manager Type' section with a 'Line Manager' status and an 'ACTIVE' button. The right sidebar shows a progress indicator '2 | 3' and a 'When and why' section.

- b. Click on the **Manager Type** dropdown menu and select the type of manager they'll be.

The screenshot shows the 'Change Manager' form in the University of Edinburgh system. The 'Manager Type' dropdown menu is highlighted with a red box, showing the options 'Line Manager' and 'Dotted Line Manager'. The 'Managers' dropdown menu is also visible. Below these fields are 'Cancel' and 'Save' buttons. At the bottom of the form, there is a 'Manager Type' section with a 'Line Manager' status and an 'ACTIVE' button. The right sidebar shows a progress indicator '2 | 3' and a 'When and why' section.

- c. Click **Save**.

Change Manager

## Managers

+ Add

Managers Required

Manager Type  
Line Manager

Cancel Save

RC	Manager Type
RC	Line Manager

Cancel Continue Submit

**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.

#### 10. Click **Continue**.

Change Manager

## Managers


+ Add

Managers




Manager Type  
Line Manager

Cancel Continue Submit

11. If relevant, add in any **Comments and Attachments**. Then press **Submit**.



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Change Manager

Comments and attachments

Comments

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Submit

3 | 3

When and why

Managers

## Appendix

### Reason for Changing Manager

Action Reason (Why are you changing the manager?)	When to use this reason
Addition of Assignment for Manager	The Line Manager has taken on an additional role at the University.
Addition of Employee Work Relationship for Manager	<b>Do not use.</b>
Change of Location of Manager	The new Line Manager will be working from a different location
Change of Manager of Manager	<b>SDA use only.</b> This is to record when an SDA has changed the manager on behalf of a manager
End of Assignment for Manager	The Line Manager's assignment has ended
End of Temporary Assignment for Manager	The Line Manager's temporary assignment has ended
New Hire of Manager	The Line Manager is brand new to the University.
Promotion of Manager	The Line Manager has been promoted
Resignation of Manager	The Line Manager has resigned
Temporary Assignment of Manager	The Line Manager has taken on a temporary assignment
Transfer of Manager	The Line Manager has transferred to a new post

## Version History

Version	Date	Description	Approved By
1.0	04 August 2025	<ul style="list-style-type: none"><li>Transferred guide to new template</li><li>Replaced all screenshots to reflect the new look of the Redwood screens</li></ul>	M Easton 01/08/25

## Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.