A Guide to Learning, Skills and Qualifications for Line Managers

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Introduction

This guidance aims to support line managers using the Learning, Skills and Qualifications apps within People and Money. Managers should also familiarise themselves with the [Guide to Learning, Skills and Qualifications for Employees.](#)

People and Money Learning is a centralised space for staff and line managers, where they can search for, enrol on and undertake learning as well as maintain records of their personal/professional skills and qualifications.

There are two apps in People and Money:

University Learning Providers (departments that design and provide learning for staff) manage most staff learning in People and Money, which should be your first place to search for learning opportunities.

Learning offers a place to record other learning completed outside People and Money. It is also where for managers view this information for their team.

Details of Learning Providers who manage learning at the University of Edinburgh can be found here.

Please note that the system terminology uses American spelling, for example ‘catalog, license’ etc. This document has been written using British English.

Before you start

All members of University of Edinburgh staff (including Edinburgh University Press, Edinburgh Innovations, and UoE Accommodation Ltd) have access to the Learning, Skills and Qualifications apps through People and Money> 'Me' and line managers have 'My Team> Learning' access.

Before reading this document, please familiarise yourself with the People and Money User Guides for the Learning, Skills and Qualifications processes and check the People and Money Updates webpage.

If you are a line manager, please ensure that you are in the correct screen/ area of People and Money Learning for either yourself or for direct reports.

Responsibilities of a Line Manager - Why you should access the Learning Skills and Qualifications Apps

- Seeking opportunities to actively encourage the use of Learning, Skills & Qualifications in their teams
- Making the most of your new hires' on-boarding experience by recommending appropriate learning
- Supporting completion of 'expected' learning assignments automatically made to new starts
- Supporting your team in improving their performance
- Having more meaningful annual reviews and one-to-one conversations
- Keeping track of your team's learning progress and identify learning requirements
- Having visibility of your team's skills and qualifications

What you have access to	What you can do
• Access to the self-service Learning app • Access to the self-service Skills & Qualifications app • Notifications via the system and e-mails via your employee account • Access to direct reports' learning engagement and skills and qualifications records • Access to learning data for your direct reports and all employees in your reporting line.	• Assign and/or recommend learning to your direct reports individually, or as a group, including new hires • View and track your team's and other teams in your hierarchy learning activities and progress & assigning learning to all in your domain • View your team's skills and qualifications • Approve essential Licences, Certificates and Registrations • Use filters to view learning data by course title and completion status and export your search results. You can also download data for your direct reports.

The Learning Catalogue

You may wish to access learning opportunities for your direct reports for various reasons, for example to support onboarding and induction, to support your team in improving their performance, to support the annual review process and to keep track of your team's learning progress and identify learning requirements.

The Learning app provides a way to signpost and provide access to the learning content that you wish your team to undertake. As a manager, you can assign and recommend learning. The courses within the learning catalogue have different delivery modes, these include:

- Self-paced offerings which are always available
- Self-paced online offerings which have a required completion date
- Scheduled instructor-led offerings which occur on certain dates, either face-to-face or via digital platforms such as MS Teams or Zoom
- Blended learning which is a mixture of self-paced and instructor-led learning activities
- Some LinkedIn Learning content
- Learning Communities which group content together and can signpost learning options to staff

If you cannot find the course you are looking for, please refer to the details of learning providers who manage learning at the University here.

You can search the learning catalogue using the category "Expected learning" which will retrieve courses which have been identified by learning providers as important to complete.

In addition, managers can record 'external learning' (learning that is currently not in the People and Money learning catalogue). For example, in Estates, teams run Toolbox talks. Managers can easily record these using the 'Record External Learning for my Team' action. This information sits alongside the learning completed within the Learning Catalogue, visible in the learning record for the direct report.

Learning for New Starts

Onboarding tasks sent through People and Money direct new employees to complete suggested learning and review and update their Skills and Qualifications.

Line managers will also receive an onboarding task to assign any applicable learning to their new team member. Required induction training includes:

- Anti-Bribery
- Data Protection Essentials
- Fire Safety
- Fraud Awareness in the University
- Getting Recruitment Right
- Inclusion Essentials at Edinburgh
- Information Security Essentials
- Introduction to Sustainability
- Preventing Sexual Harassment
- Understanding Unconscious Bias

Notes:

- Some learning is automatically assigned. This is learning that the University expects all staff to complete.
- The above list is continuously being reviewed and therefore might change from time to time.

What should I do if I have a question regarding Learning, Skills and Qualifications in People and Money?

Please search My Knowledge for support in the first instance. Follow the People and Money user guide 'How to search My Knowledge'. If you cannot find the information required, raise a service request, following the People and Money user guide 'How to raise and maintain a service request enquiry'.

Other points to note

- Any previously completed learning prior to the launch of Learning in People and Money **has not been** automatically added to a learning record. The record of completed learning can however be added manually by the employee or manager, if desired. This is becoming less relevant as go-live of People and Money learning was in November 2021.
- Managers should continue to make all requests for external learning following current local process. Further information is available on the Procurement webpage.
- All staff can review and update their Skills and Qualifications information at any time, see the 'Skills and Qualifications' section below for further information.
- Casual staff and visitors **do not** have access to Learning or Skills and Qualifications Apps.

- Please ensure that any downloaded learning data is stored in accordance with the University's Data Protection | Data Protection and Records Management | Data Protection guidance.

How to Browse the Learning Catalogue, Assign and Recommend Learning

A line manager can browse the learning catalogue to find suitable learning to recommend and assign to their direct reports, and others in their organisation. The learning catalogue contains courses and resources created by University of Edinburgh Learning Providers as well as some LinkedIn Learning courses. Note that content within the learning catalogue changes over time. You can either browse the catalogue, or search for a specific key word and/or date range to see what is available.

The learning catalogue is accessed via the Browse functionality in the Learning app in People and Money.

Managers can *assign* and *recommend* learning to their direct reports, and others in their hierarchy - either to individuals or to a group.

When a manager *recommends* a learning option, the employee can decide if the option is for them. They are not enrolled in the learning – the employee must enrol to create a record of this learning.

When a manager *assigns* a learning option, the employee is enrolled. Assigning learning has two options, *required* or *voluntary* learning.

- Voluntary learning – when learning is assigned as voluntary it is the learner's decision when, how and (in some cases) if - they will complete the option. The employee has the option to withdraw from the enrolment.
- Required learning will appear as an enrolment (to be completed) with a completion date. Employees cannot withdraw from required assignments.

Assignment or recommendations of learning can be at **course** level or **offering** level. If the manager makes an assignment at offering level, for real time learning option (Instructor-Led or Blended), this means you have enrolled the staff into a specific date and time delivery of learning. In most situations it is best to assign at the course level as the employee can choose when to do the learning. If you wish to assign a specific offering to a member of staff or team, you should first check their availability to attend.

Where a manager is required to approve a direct report's learning, for example, where there is a cost implication, this is done by local process and not within People and Money.

The User Guide – Line manager – How to manage team learning support managers in this process.

Waiting Lists

Some courses have a maximum capacity of attendees. Employees can join a waiting list once the maximum capacity is reached, and to withdraw from the waiting list if they choose to. Managers can see that their direct report is on a waiting list or add a report to a waiting list.

Withdrawing from or Cancelling a Course

Line managers may need to withdraw from or cancel attendance of a course or offering for their direct reports. Alternatively, Learning Providers may also cancel and withdraw learners. Prior to withdrawing any learning line managers should discuss with their direct report the reason for withdrawing.

Managers can withdraw learners from voluntary assignments but cannot withdraw a learner from a required assignment set by someone else.

Managers can cancel/remove external learning from their direct report's records.

The User Guide – Line manager – How to manage team learning supports this process.

If you cannot withdraw a direct report from a course you should contact the Learning Provider, details of this can be found in the course details within the learning catalogue.

Communicating with the Learning Provider

If you have questions about a course or offering you should contact the Learning Provider, details of this can be found in the course information in People and Money.

Viewing Course Completion and Learning Activities

Using My Team> Learning, Line Managers can:

- view their direct reports' learning record, including the status of their courses, and dates of activities
- Use "Switch Team" to view learning records of their direct reports team members
- Add external learning or previously completed learning to your direct report's learning record

A good way for a learner to keep track of continuing professional development (CPD) is to add learning taken outside the University to their learning record. Once a learner has done this, it is also visible to their line manager.

Line Managers can view their direct reports' learning records including external learning that they have added and can add external learning for their direct reports.

Learning Data

Learning data is visible in People and Money to managers from My Team> Learning. Data is available for their direct reports and all employees in their reporting line. Managers are able to apply additional filters to the data, including by course title, enrolment status, plus enrolment and completion dates, to support the monitoring of their team's learning, and export their search results.

Managers are also able to download the data for their direct reports and all employees in their reporting line.

Please ensure that any downloaded reports are stored in accordance with the University's Data Protection | Data Protection and Records Management | Data Protection guidance.

Learning Transcript Reports

A standard Learning Transcript report is distributed by email from the HR Helpline during the first working week of the month and shows data from 01 June 2023 up until the last day of the previous month.

The report is issued to our Directors of Professional Services (or equivalent) and local contacts using school mailboxes wherever possible or named SDAs. This information is also shared with relevant HR Partner colleagues.

You can use this report to monitor completion of University expected learning (e.g. Data Protection Essentials, Inclusion Essentials and Information Security Essentials) as well as to review other learning activities that staff within your area have completed.

The report you will receive will be for your College/Professional Service Group at School/Department or Planning Unit Level. It won't be possible to break it down to individual line managers but remember line managers can see learning for their staff via the My Team >Learning app.

The report is in Excel format, which you can filter as required. Please consider if it would be helpful for you to share the report with colleagues in your area, e.g. filtering and sharing Health & Safety training completed with your School/Department safety teams.

If you do not want to receive this report on a regular basis or have any questions, please raise a Service Request using the category 'Reports'.

Skills and Qualifications – How to view, approve and update

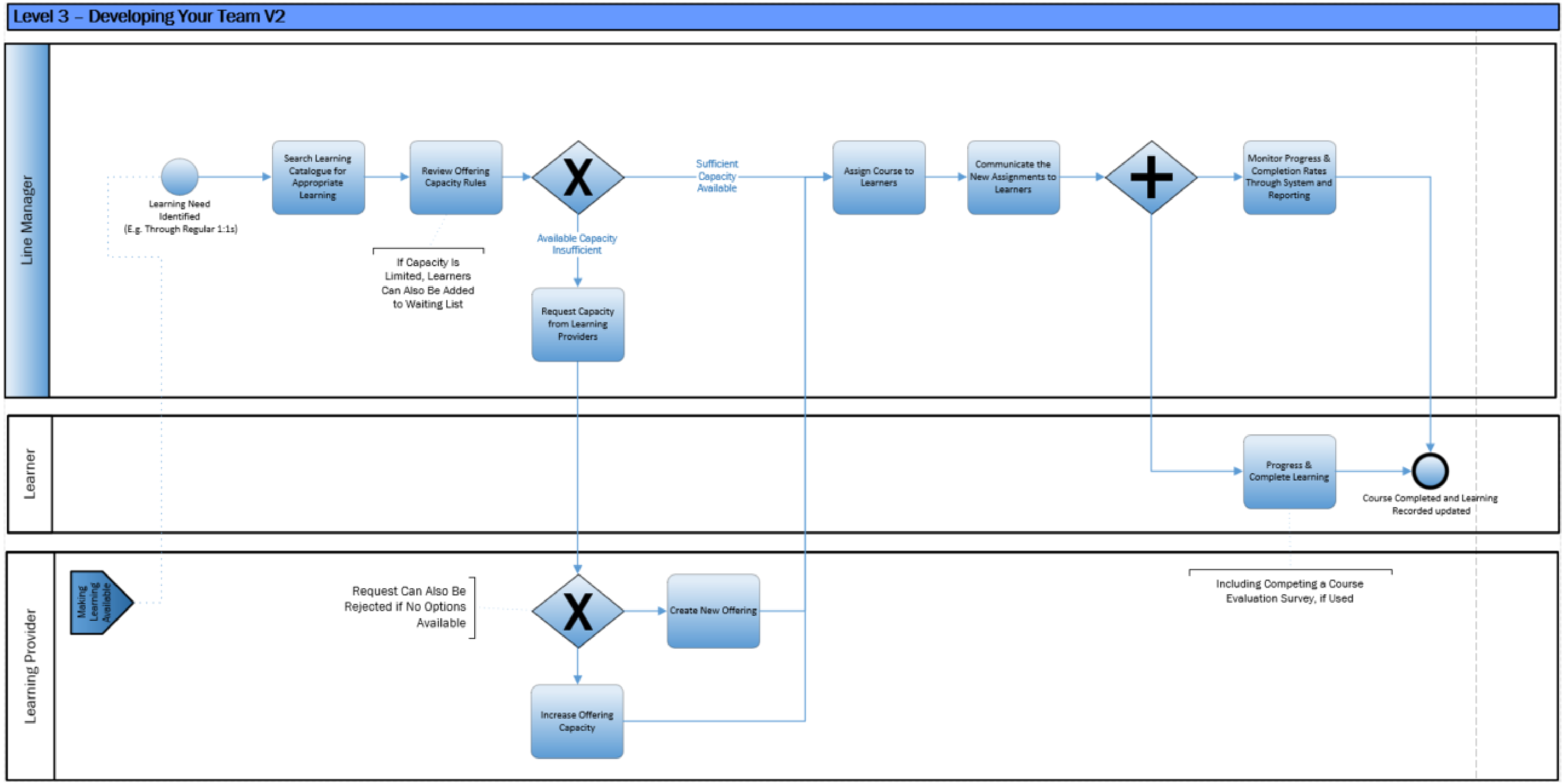
All employees can update their skills and qualifications through Me>Skills and Qualifications within People and Money at any time. Line managers can view and update their direct reports learning, skills and qualification record and approve any additions to Licences, Certifications and Registrations (Essential for current role).

Please see the User Guide called How to review, approve, update skills and qualifications – Line Manager.

If the qualification, licence, certification, or registration is not listed you can request that this be added. Please complete the Request for additional qualification, licence or certification form and submit this via a Service Request, Enquiry >Skills and Qualifications.

There is no requirement for employees to update this information but may be of benefit to support career progression discussions and help managers identify the skills and qualifications within their team. Skills and Qualifications is available to Hiring Managers during the recruitment process and internal applicants will be prompted to review and update these during the application process.

End to End Process Map



Key Roles

Role	Description
University of Edinburgh employees and employees in subsidiaries	All University members of staff have access to view learning activities, to enrol and complete them, where appropriate, and to record learning they have completed, externally to the University in their People and Money learning record. Students do not have access to learning in People and Money unless they are an employee and should use their employee login. Visitors do not have access to People and Money Learning.
Line Manager	All members of staff that have or has direct or matrix -style management responsibilities for the employee or team. Line Managers has access to Learning, Skills and Qualifications for themselves and their team.
Learner	Employees within the University. NOTE: Agency Workers and Casual staff do not have access to People and Money – Learning.
Learning Provider	Staff that design and provide learning within the University.

Glossary (A-Z)

Terminology	Explanation
Activity	Content within an offering that the learner must complete. For example, an activity may be ‘Prep work to do for First Aid Training’, or in an example where the learning is held over multiple days- each date, location would be called out in a separate activity.
Assignment	A one-time only assignment of some learning. Assignments can be for a course or an offering. Assignments can be self-assignments (done by the individual), or assigned by the manager, or others (i.e. Learning Provider).
Blended Learning	A blend of learning where some elements of the learning will be instructor-led, and some elements will be self-paced.
Certification	A status or level of achievement confirmed in an official document. Often a certification is achieved following the successful completion of a professional training programme or course. An example of a certification required for staff working in catering in the University is the ‘Royal Environmental Health Institute of Scotland (REHIS) Elementary Food Intermediate Certificate’.
Course	A course is an entity in the Learning Catalogue that defines what learners will learn from completing an offering. A course is made up of offerings, which are instances of the course that contain information about how, when, and where you undertake the learning. For example, a course called ‘First Aid’ may have an instructor-led training offering in Edinburgh, another instructor-led training offering in Glasgow, and a self-paced online offering. You can decide which offering of the course they wish to take.
Delivery Mode	How the course or learning is given – either instructor-led, self-paced or blended.
Evaluation	Digital feedback forms that are provided to learners at the end of a course, to measure the satisfaction of the learner. These may be on other systems, depending on the Learning Provider’s preference.

External Learning	Learning completed outside of People and Money Learning, which you want to record within the system using the action "Record External Learning"; this is then visible in the learning record as a non-catalogue item. The learning can be completed externally or internally using a different system.
Instructor	The person delivering the training, whether in-person or online. There are two types of training facilitator described in People and Money: either Instructor or Training Supplier, to describe the person delivering the training, whether in person or online. Instructors are University staff within People and Money whereas training supplier will usually be an external facilitator.
Instructor-Led Learning	There will be a real time facilitator leading the learning item - this may be in person or delivered live on a digital meeting platform. Synchronous Learning.
Learning Catalogue	The searchable catalogue of learning opportunities (includes Courses, Offerings, Communities).
Learning Community	A learning community is a place where learning is curated for a particular topic or area of interest and shared or assigned to a distinct set of people known as the community member.
Learning Provider	The department or area that provides certain learning activities. You can search the Learning Catalogue by ‘Learning Provider’ e.g. ‘Health and Safety’ or ‘Human Resources’ etc.
Learning Record	The employee’s record within People and Money that shows courses which are completed, in progress, not completed, assigned, and suggested.
Licence	A formal permission granted to an individual from the government or other authority to do something. An example of a licence required for a number of jobs in the University is a valid driving licence. Another example is a Home Office Personal Licence that gives permission to an individual to undertake regulated procedures in biomedical research.
Offering	A specific instance of a course. For example, this may be ‘First Aid Training Day Edinburgh’ or ‘First Aid Training Day Glasgow’. These elements sit within a Course; they are in effect the building blocks of a Course.
Prerequisites	An item, definition, or level that learners must meet to undertake the learning. An example would be ‘the prerequisite for enrolling in Advanced Python Skills is that you have completed the ‘Introduction to Python’.
P&M	People and Money.
Qualification	A qualification is a pass of an examination or an official completion of a course, for example BA Hons, GCSE, Advanced Higher.
Recommended Learning	Learning content in the catalogue can be recommended to a Learner by a colleague or manager. The Learner will receive a notification of the recommended learning. (e.g., Course, Offering, Specialisation).
Registration	A registration is a professional registration with a relevant professional body that recognises the individual’s ability to practice in a specific professional capacity and their commitment to the agreed standards. An example is the Nursing and Midwifery Council Registration.
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 People and Money.

Self-Paced Learning	The learner may be able to decide when to complete the learning, normally this will be an eLearning course.
Training Supplier	There are two types of Facilitators to choose from in People and Money, either Instructor or Training Supplier, to describe the person delivering the training, whether in person or online. A training supplier is a facilitator from an external company.
Voluntary Learning Assignment	Learning that the learner chooses to undertake, or that which has been assigned by their Line Manager or a Learning Provider. Assigned learning can be for a course or an offering.

Subsidiaries

There are three subsidiary companies: Edinburgh University Press, Edinburgh Innovations, and UoE Accommodation Ltd.

Subsidiaries do not have any Learning Providers specific to them or their areas/departments. However, all employees, including those working within a subsidiary have full access to the Learning, Skills and Qualifications Apps in People and Money.