System User Guide

Line Manager Guide to Skills and Qualifications

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Contents

Introduction

Skills and Qualifications is a space for University employees to record information on their education, work history, career preferences, licences, certifications and registrations. It also provides a space for employees and line managers to keep track of licences, certifications and registrations that are essential requirements for certain roles.

Employees are encouraged to use this tool to support career progression discussions with their line managers. It also helps managers and staff to identify experience and maintain essential Skills and Qualifications records.

Managers have access to view the information for their direct reports and their next level reports (indirect reports).

Only changes made to the "Licences, Certifications and Registrations - Essential for current role" require an approval by line managers. This should only be used for options that need to be tracked.

Line Managers can make these updates on their direct or indirect report's Skills and Qualifications with no approval process. The employee will get a notification of the change.

Line Managers can delete recorded options; employees will get a notification of the change. Managers should discuss any changes with their staff, always encouraging staff to make their own changes in the first place.

The outcome of some learning items is that the completed participants get an updated option added to their Skills and Qualification. The employee will get a notification of the change.

In addition, for some learning items, a specific option within Skills and Qualification is checked as a prerequisite to attending the learning.

Further information is available in the [Guide to Learning, 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.

How to view and update your direct/indirect reports Skills and Qualifications

1. Navigate to the **My Team** tab.

2. Under **Quick Actions**, click **Show More**.

3. In the **Talent** area, select **Skills and Qualifications**.

4. **Search** for or click on the blue name link to **select** your direct report.

Adding or Editing the Skills and Qualifications Profile

1. Click **Edit** (the pencil icon) to amend existing details **or delete out-of-date information** or click **Add (+)** in the sections where you want to add new information. Add any attachments as required.

2. Remember to click **Save** once you have finished updating the section.

3. **Notifications** are sent to the employee for any edit, addition or deletion.

How to approve any edits or addition to "Licences, Certifications and Registrations – Essential" for current role

1. A notification is sent to you by **email** and will be shown on the **Bell Notification** in People and Money.
2. Approve or Reject via **email**: Click the **Approve / Reject** option in email.
3. Approve or Reject via in **system bell notification**: Open the record to review the content, by clicking on the name link in blue. Click **Approve / Reject**.

In Detail

Basic Navigation

1. Navigate to the **My Team** tab, then click **Show more**. In the **Talent** area, select **Skills and Qualifications.**
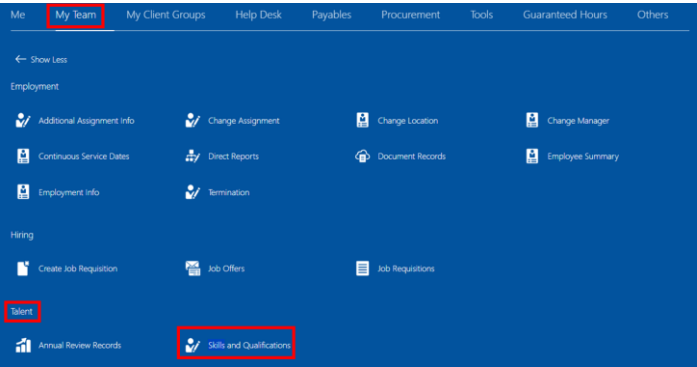
2. **Search** for the employee you wish to view by various search terms like name, person or assignment number or use the **filters** to display your direct reports or all reports. Further filtering options are available by clicking on **Filters**; a list will be displayed on the right-hand side of the screen.
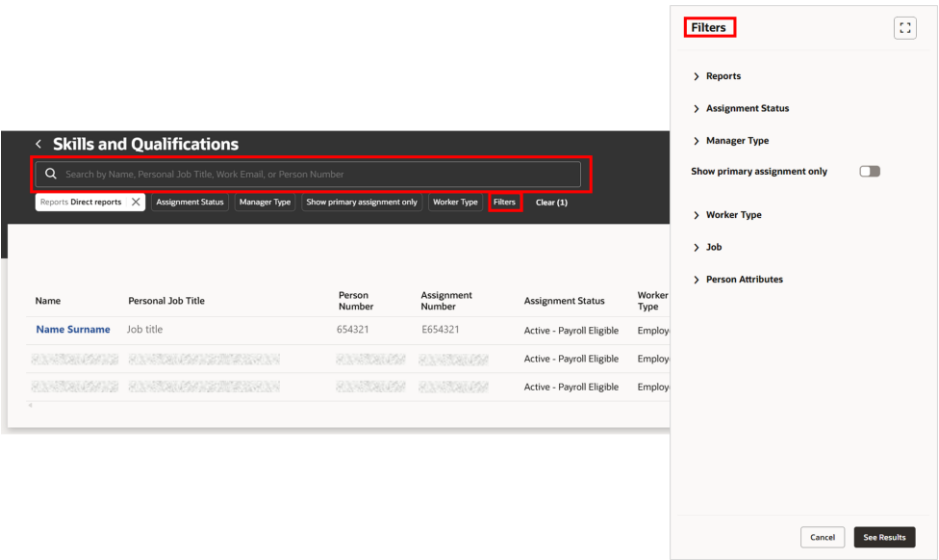
Alternatively, select from the displayed list by clicking on the blue hyperlinked name of the employee.

3. Click on the name of the person to show their skills and qualifications profile. The profile is split into different sections:

- **Career Preferences** – Information can be added on their career aims within and outside of the University of Edinburgh.
- **Licences, Certifications and Registrations** – **Essential for Current Role** – To record any licences and certificates held that are essential for the role. Employees who add anything here will require line manager approval.
- **My Licences, Certifications and Registrations** – To record any licences and certificates held.
- **Education** – For recording formal education and qualifications.
- **Work History** – For recording current or prior work history (not editable by a line manager).
- **University of Edinburgh Skills and Behaviours** – To record [digital skills](#) and [researcher skills](#) here.
- **Special Projects** – For information on any projects an employee has led or contributed to.
- **Additional Information** – Used to record early career research status only. Employees and line managers may update this to support the Research Excellence Framework (REF) data analysis.
- **Attachments** – To record any other relevant documents here.

The screenshot shows profile sections including:

Education +

Add items to the profile.

Add here information on your formal education and the qualifications that you hold, for example, a degree. If the option that you want to add is not listed go to the Helpdesk and raise a Service Request.

Work History

After items are added, you can see them here.

University of Edinburgh Skills and Behaviours +

Add items to the profile.

At present this section references the Digital Skills Framework and the Researcher Development Framework. Record your skills here.

Special Projects +

Add items to the profile.

You can add information on any projects you have lead or contributed to. To start, select a project category, for example Research Project, Transformation/Change Project, Volunteering Project.

University of Edinburgh Skills and Behaviours +

Add items to the profile.

At present this section references the Digital Skills Framework and the Researcher Development Framework. Record your skills here.

Special Projects +

Add items to the profile.

You can add information on any projects you have lead or contributed to. To start, select a project category, for example Research Project, Transformation/Change Project, Volunteering Project.

Additional Information +

Add items to the profile.

Please use this section only if you are an Early Career Researcher, to add any relevant additional information.

Attachments ✎

| Miscellaneous | Last updated by ... on 18/10/2024 | ⬇ |
| Miscellaneous | Last updated by ... on 18/10/2024 | ⬇ |

Adding or Editing the Skills and Qualifications Profile

1. Click **Edit** (the pencil icon) to amend existing details **or delete out-of-date information** or click **Add (+)** in the sections where you want to add new information. Add any attachments as required. Remember to click **Save** once you have finished updating the section to retain this on the profile. The example below is showing the fields to add a licence, certificate or regstration for the employee.

2. Notifications are sent to the employee for any edit, addition or deletion.

Tips

- Click on the **Print** button top left to download/print a direct report's Skills and Qualifications.

- Scroll down the page to view the full profile.

- If a field is madatory it will be shown as a 'Required Field' when you save.

How to approve Licences, Certifications and Registrations - Essential for current role

This approval process only occurs when an employee who is your direct reports adds an option to the section called "Licences, Certifications and Registrations - Essential for current role".

A notification is sent to you by **email** and will be shown in the **Bell Notification** area in People and Money.

To approve or reject via email

1. To approve or reject via email, click the **Approve** or **Reject** option in the email.

   Details of what has been added to the record is outlined below in the large text box. If options are left blank by the employee they will not be displayed.

   You can also look at the record in People and Money by clicking the blue link at the top called

Workplace Application.

If you have seen the correct evidence to confirm that the employee has the Licence, Certification or Registration and it is Essential for their role, then click **Approve**.
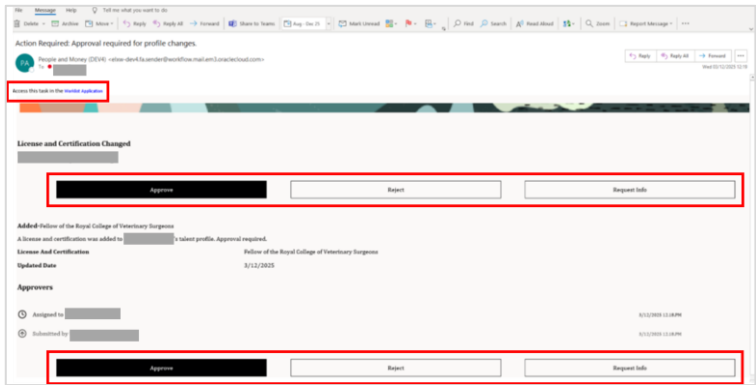
If this Licence, Certification or Registration is not essential for their current role or you want more evidence, click **Reject**, adding your own reason.
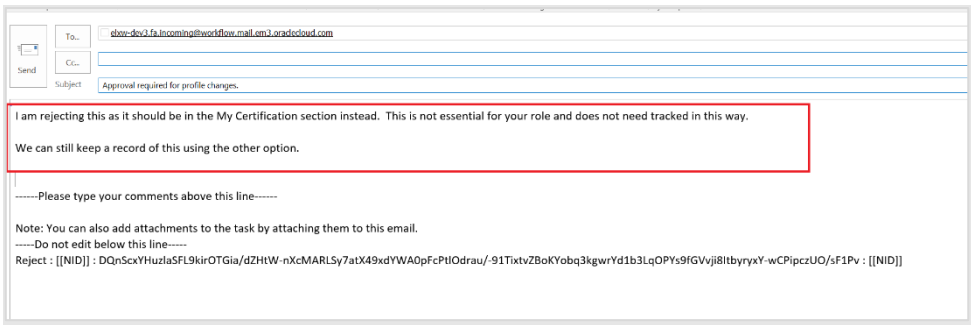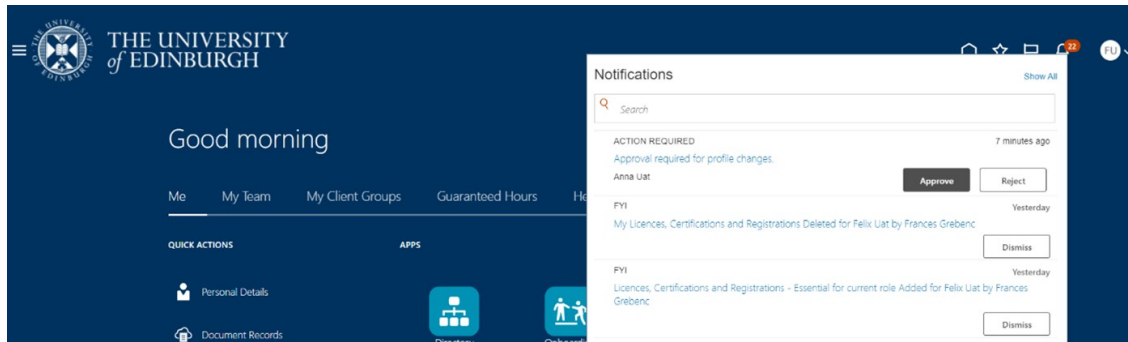

The reason added will be included in the notification that goes back to your direct report.
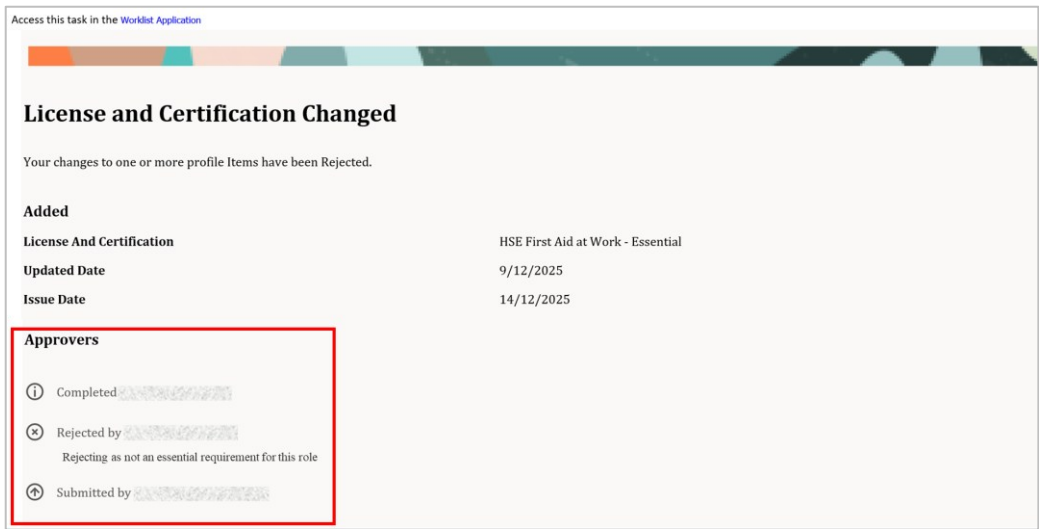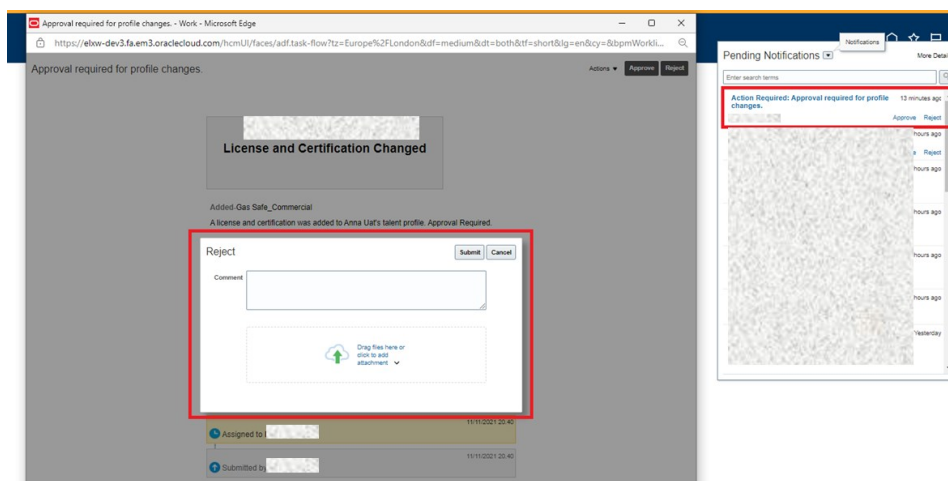
To approve or reject via in-system bell notification

2. Approve/Reject via in-system bell notification: Open the record to review the content, by clicking on the **name in blue/link**.

3. Click **Approve or Reject** – the information is displayed on the pop-up when you click Approve or Reject; you have the option to add the reasoning or an attachment (only if required).

In the same way as in the email version outlined above, a reason can be added to the Reject option.

Tips

- The attachment option is available for use, if appropriate for the situation. Follow the current agreed practice for your area when viewing and recording evidence. If there is no need to keep a record of the evidence, then don't add the attachment. If you use a different storage system for copies of documents, continue as per local practice.

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0	04/2021		SK
2.0	15/12/2025	Updated to reflect launch of Redwood screens.	ME

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.