



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

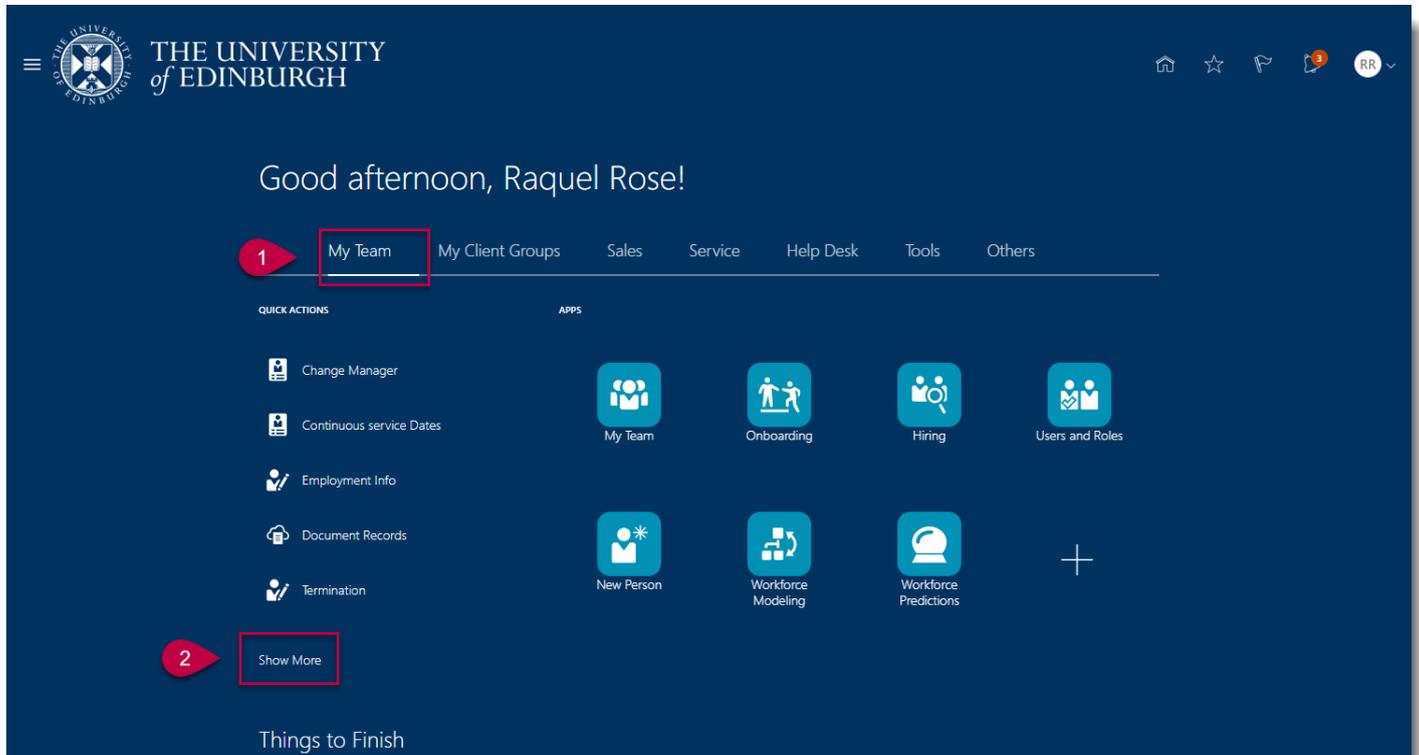
This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

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**.

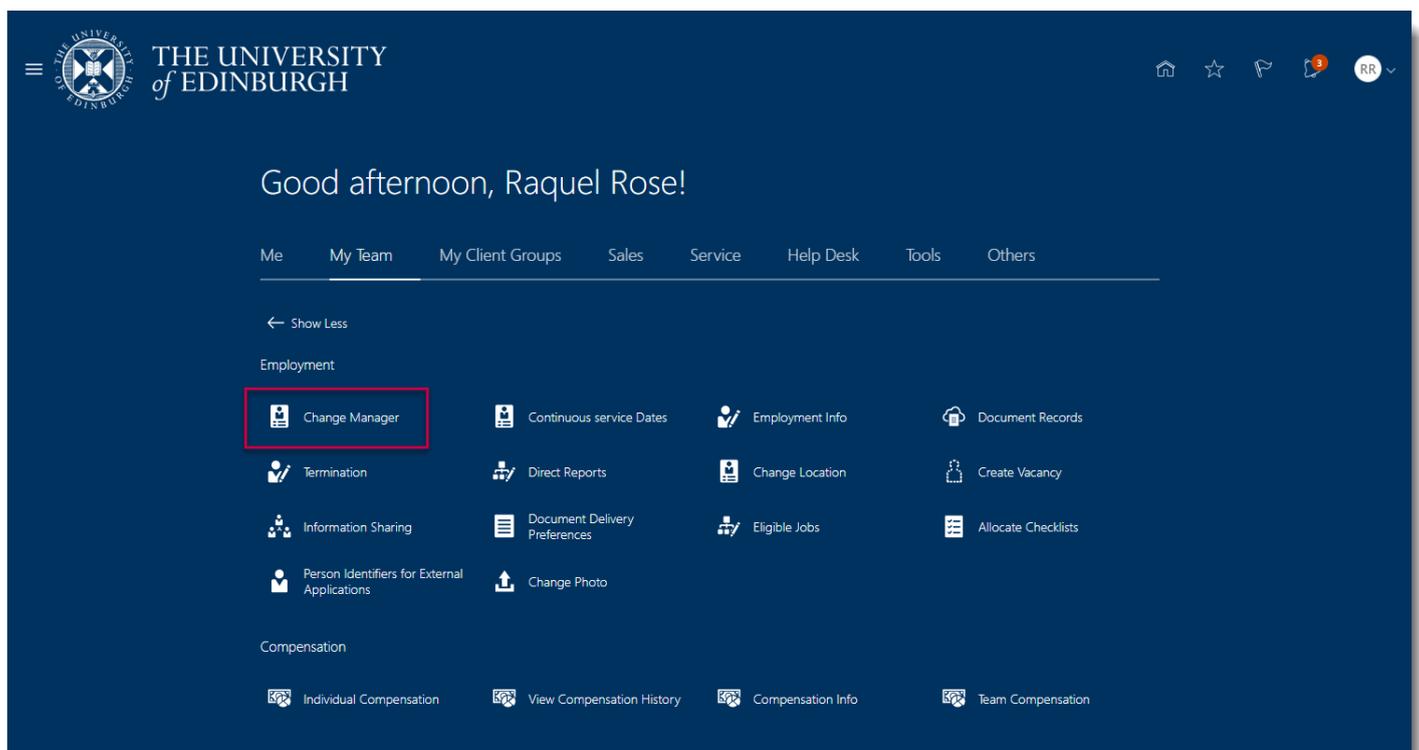
In Detail

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**.

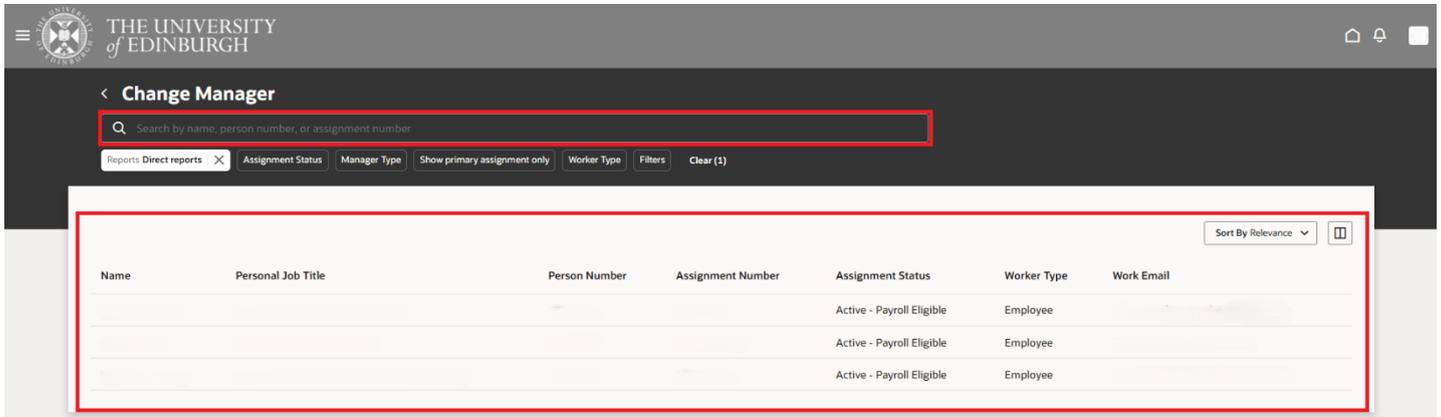


2. In the Employment section, select **Change Manager**.

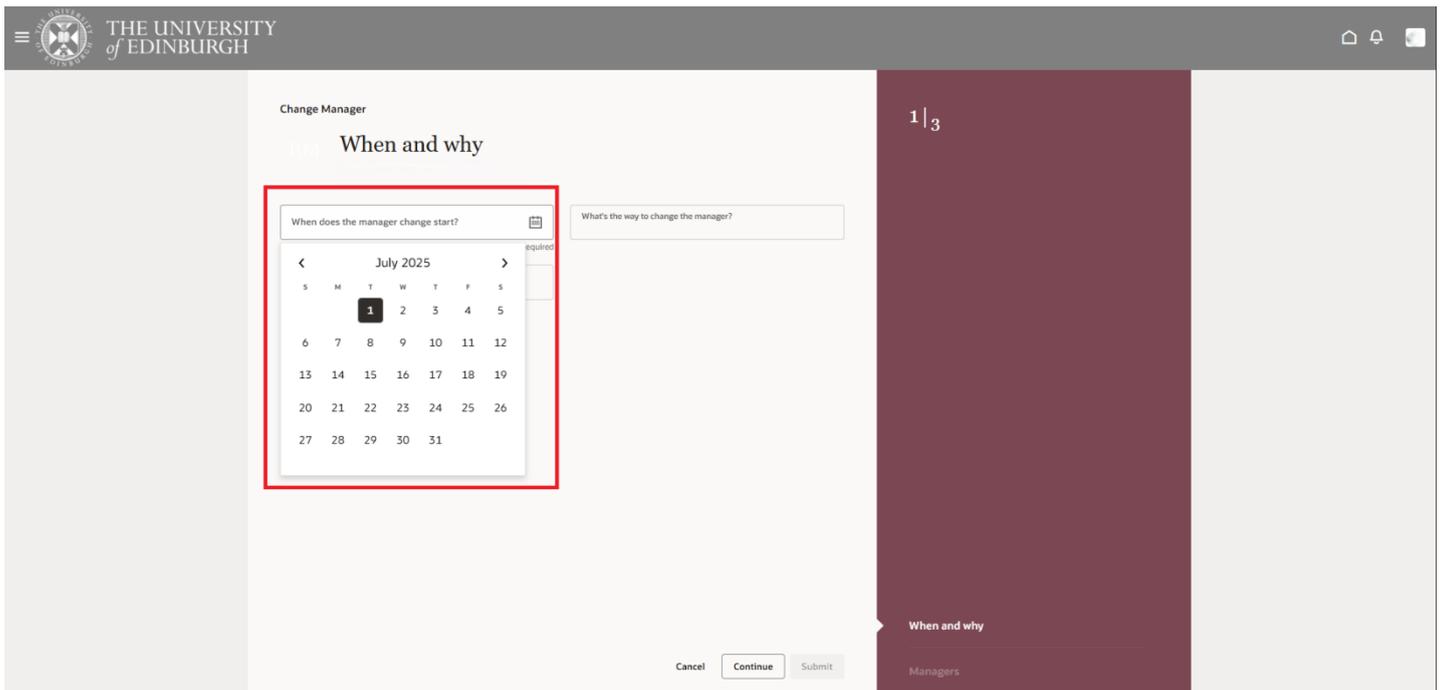


3. Populate the search bar with their **Name, Person Number** or **Assignment Number**. Alternatively, select from the list below the search bar.

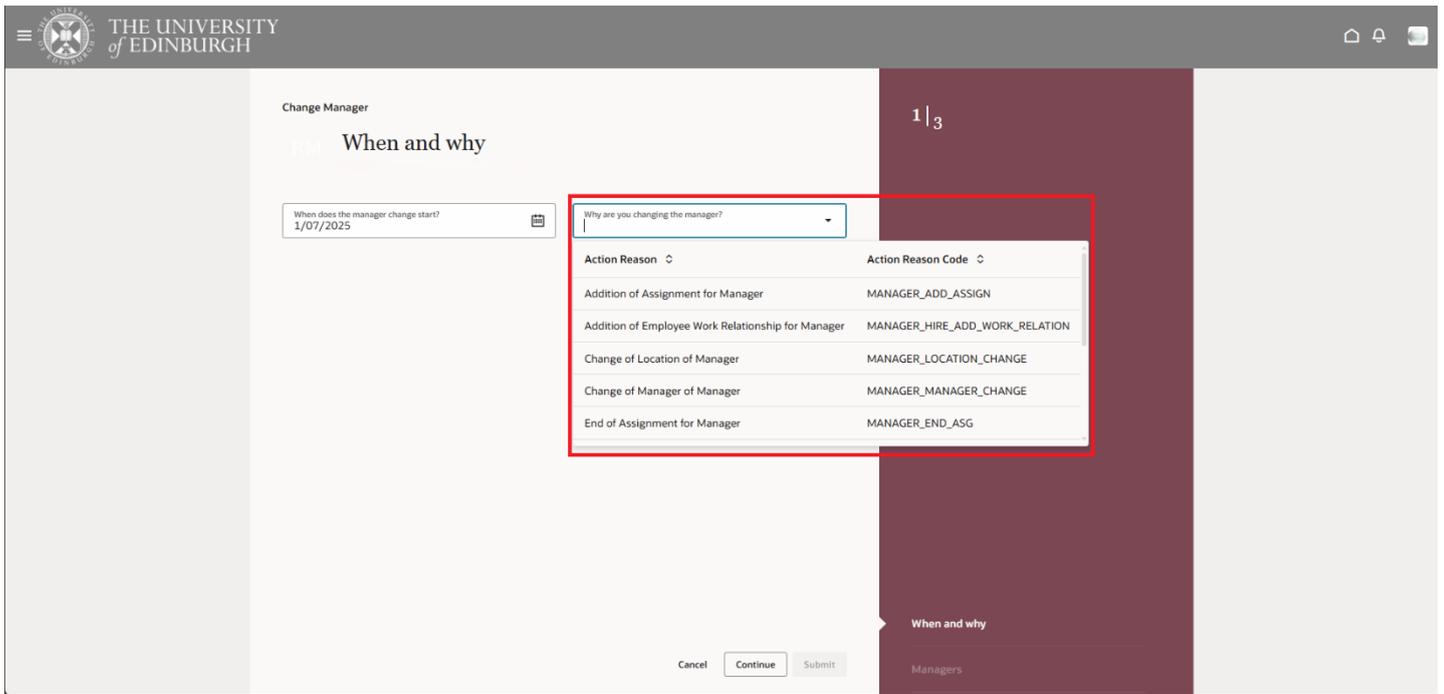
If the employee holds multiple assignments, all numbers will appear in the search but you can use the filters to locate the correct record to update.



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

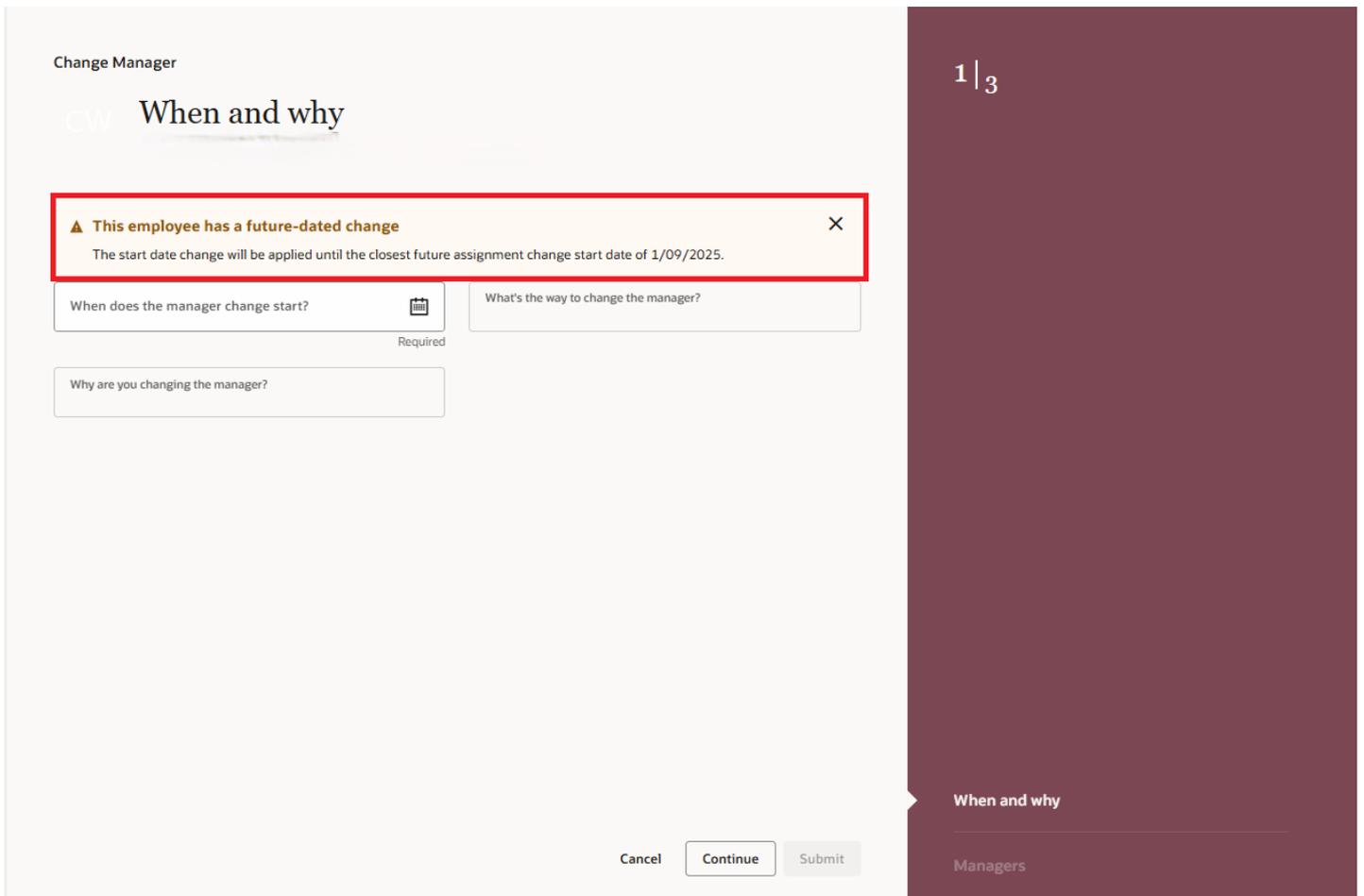


- b. **Reason** for changing the manager from the dropdown menu.
Note: for all the available reasons and when to use them, check the [Appendix](#).

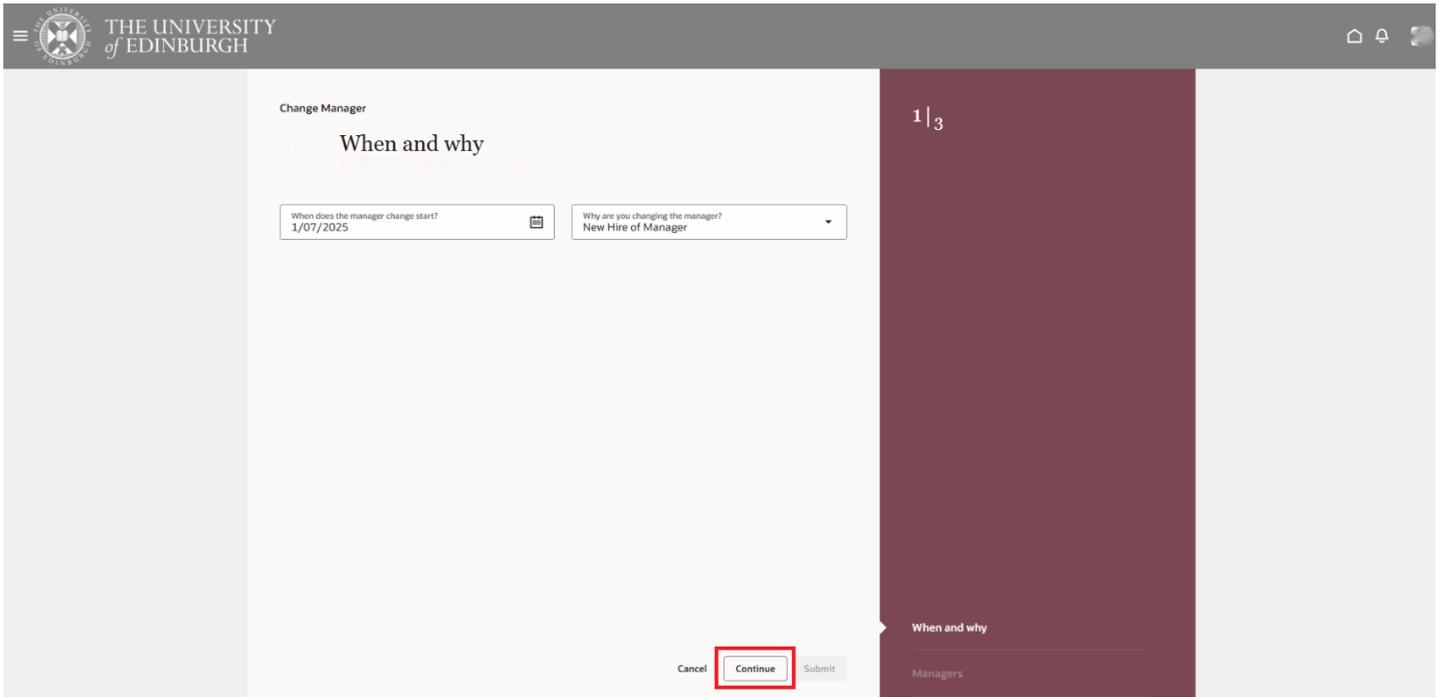


Tips:

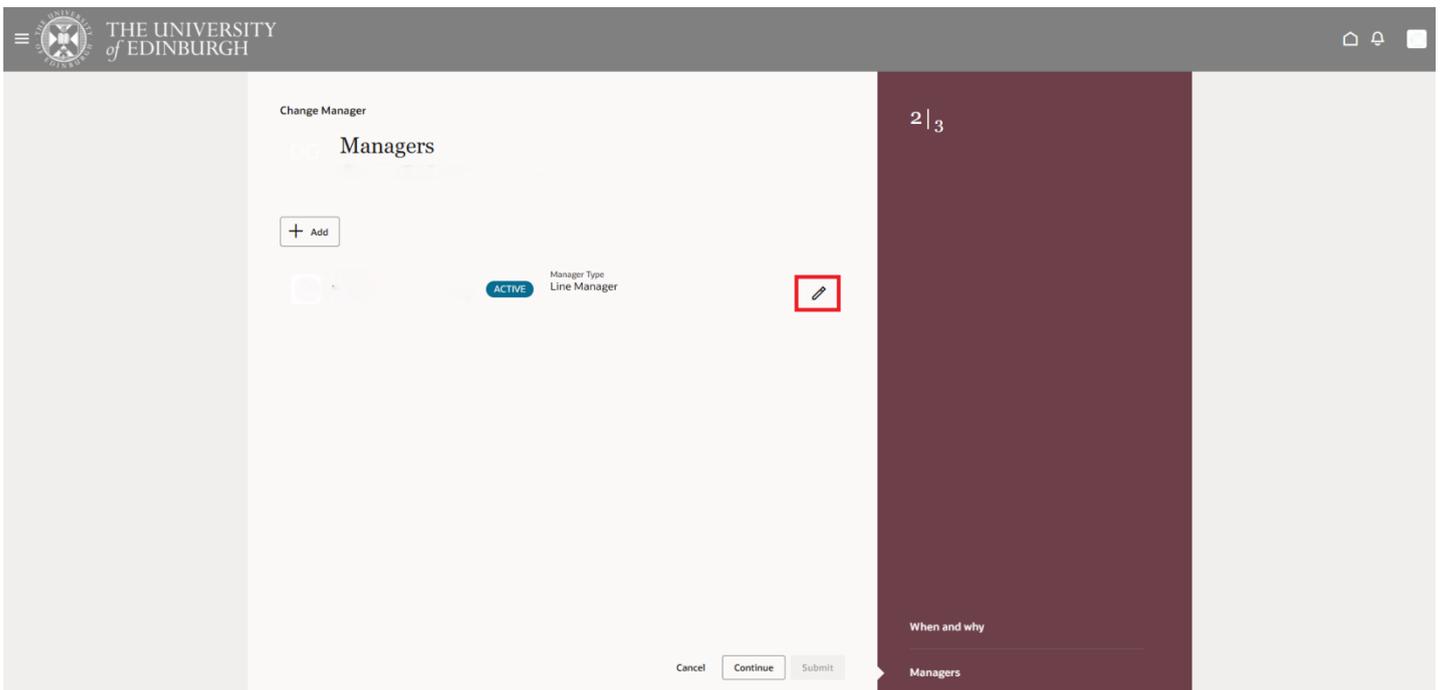
- If an individual has a future dated assignment you will receive a warning message at the top. If the change is to continue **beyond** the date shown in the message, you will need to submit change the again.



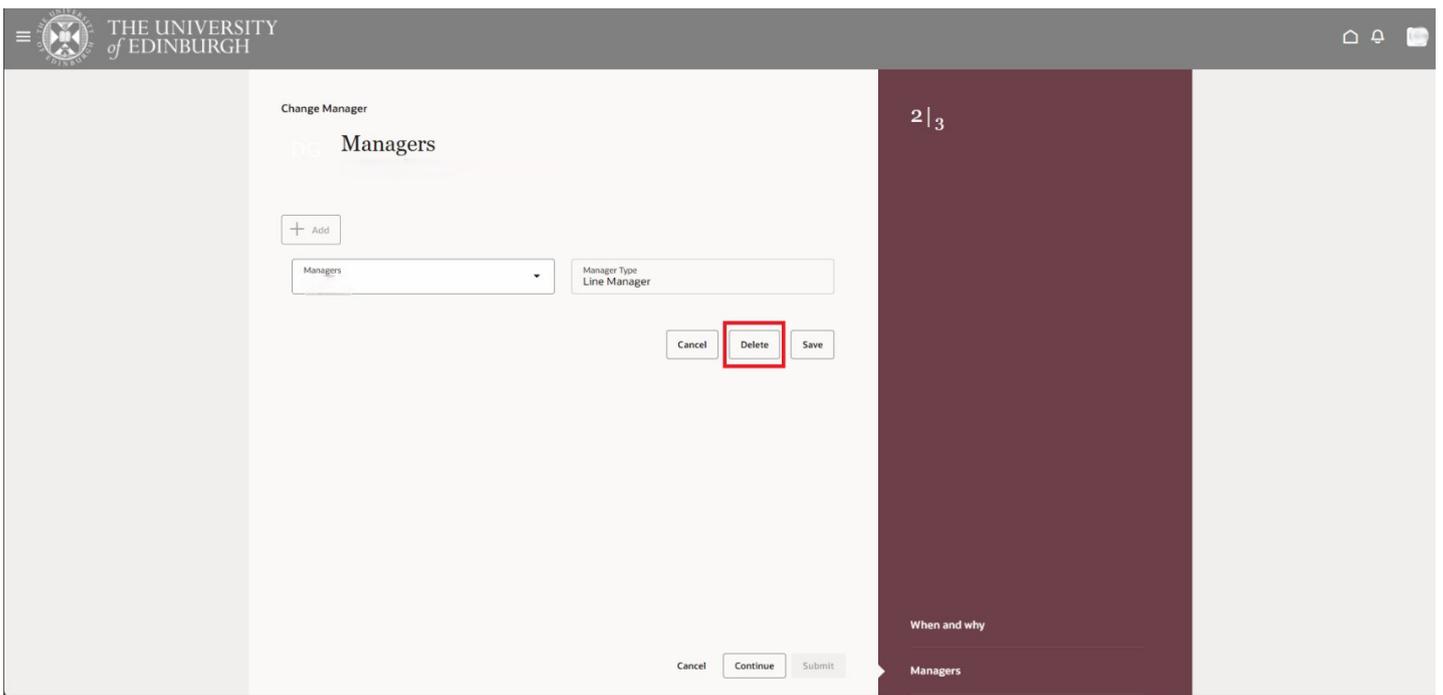
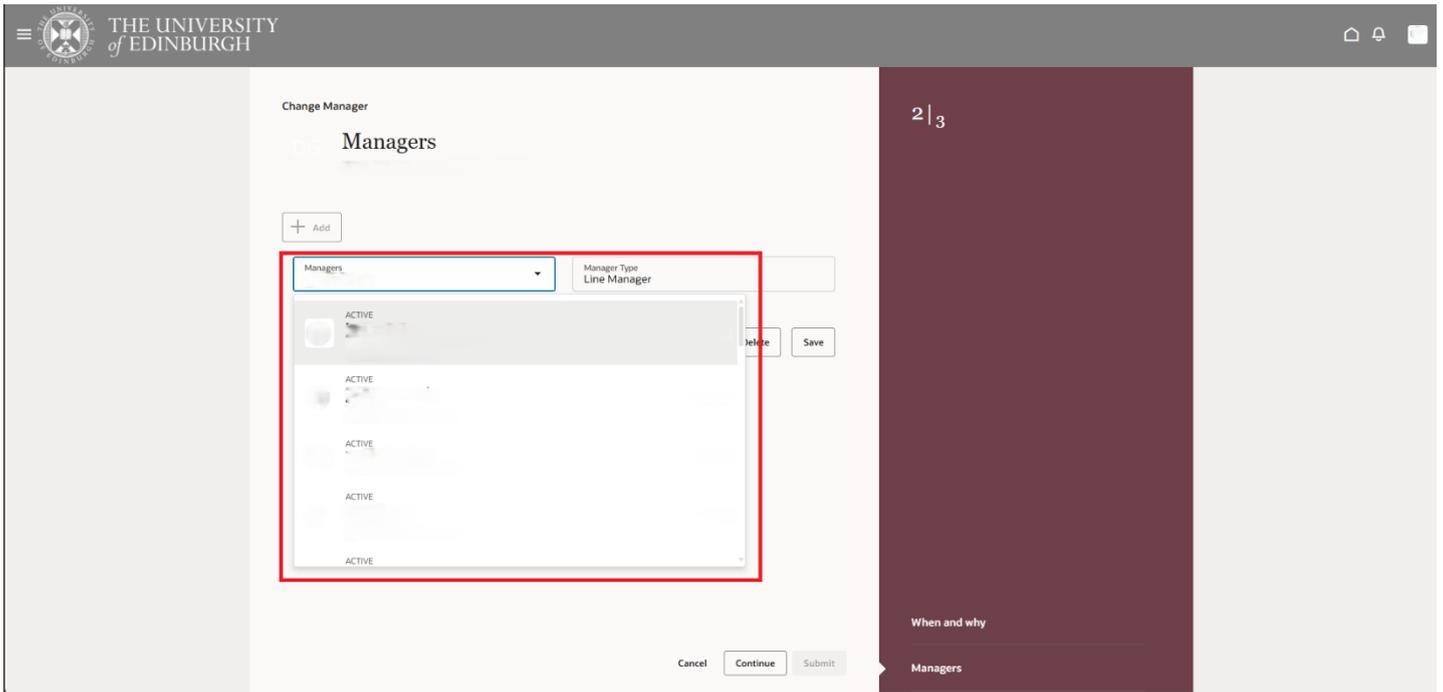
5. Click **Continue**.



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



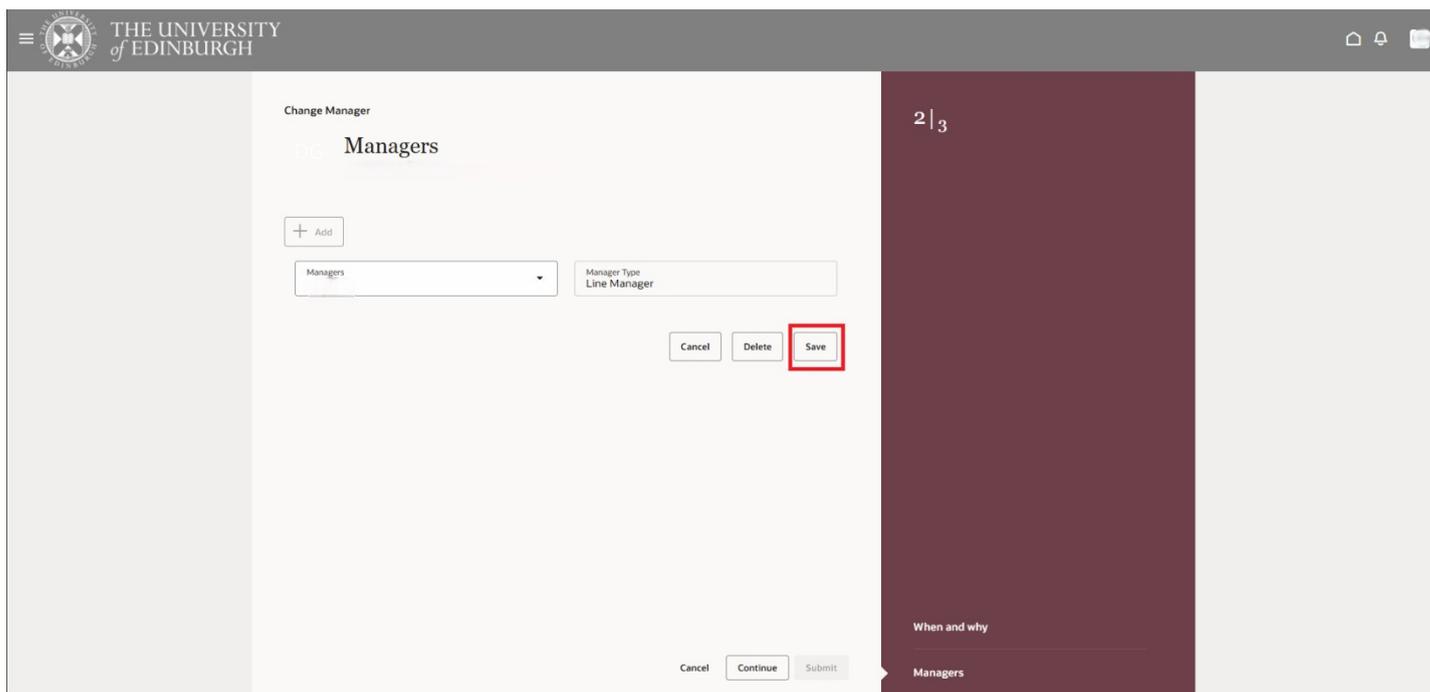
7. Under **Managers**, search for the name of the new manager and select their details or press **Delete** to remove the current line manager.



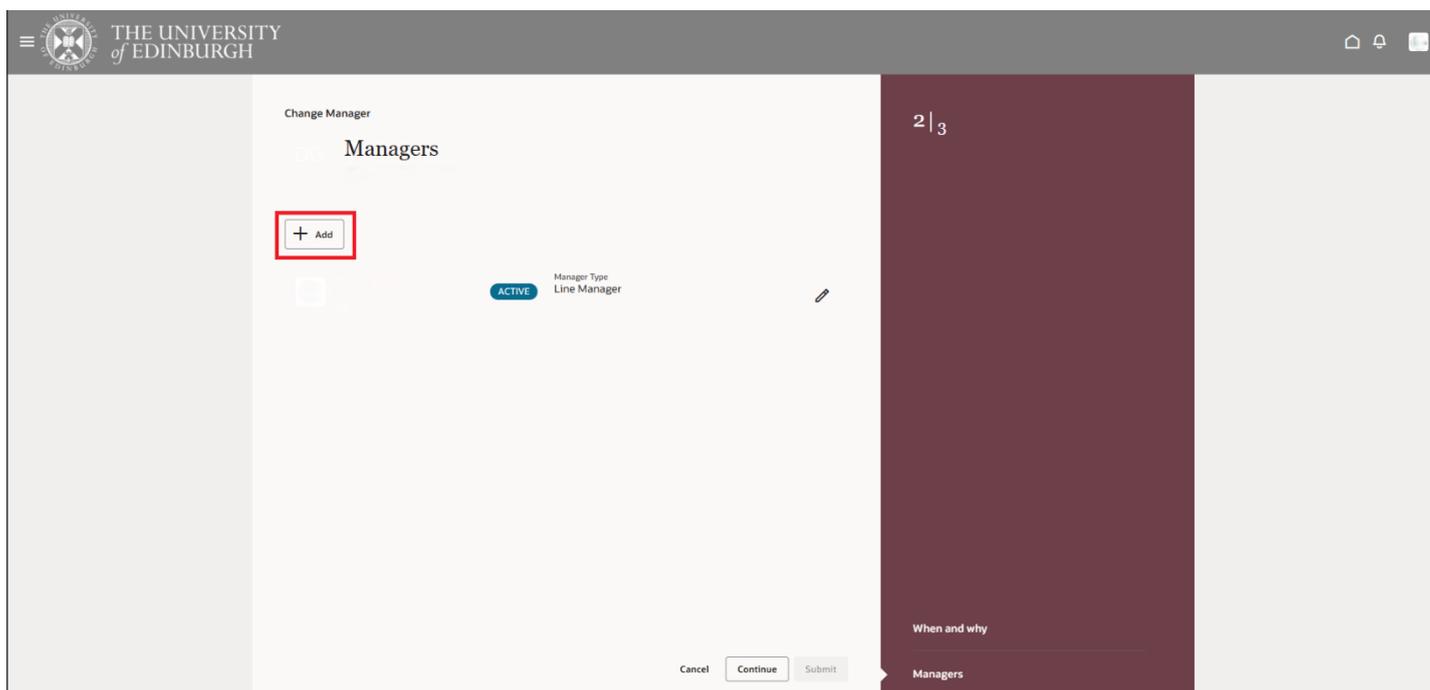
Notes:

- 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.

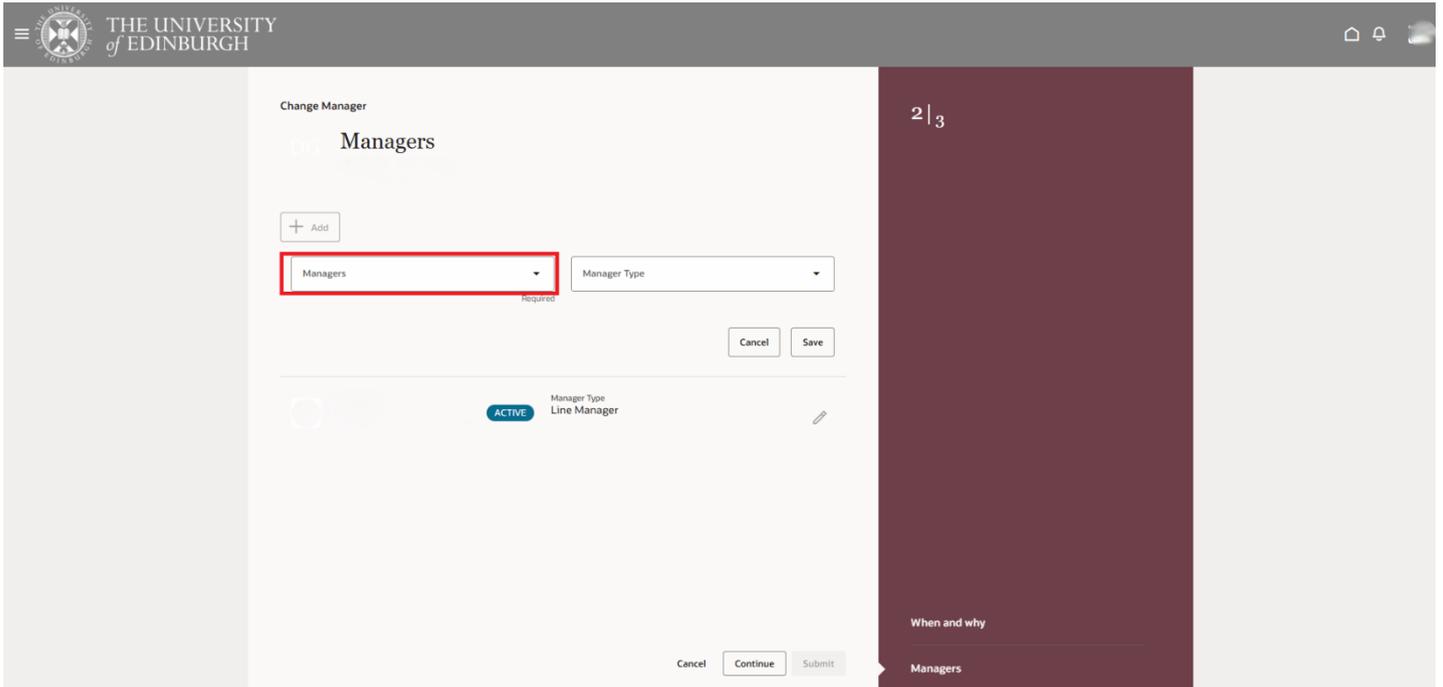
8. Click **Save**.



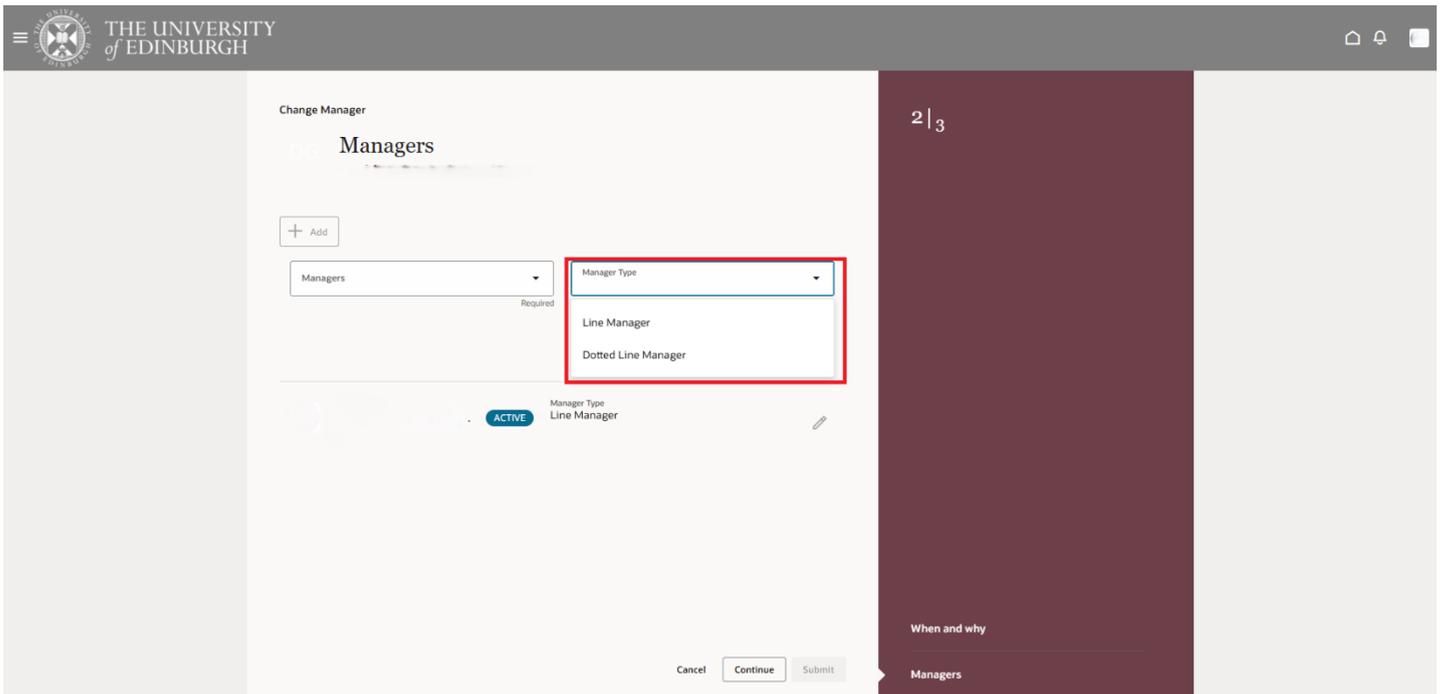
9. Alternatively, click **+Add**.



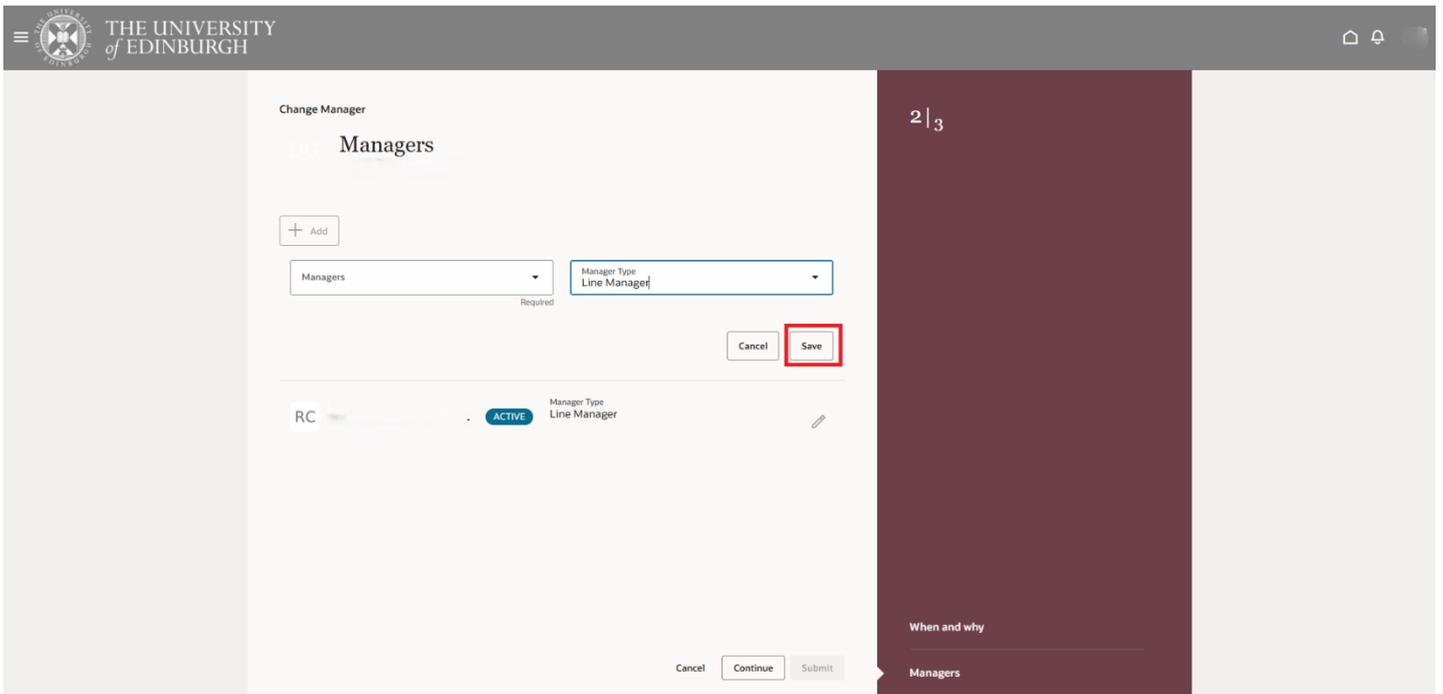
a. **Search** for and **select** the name of the new manager.



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

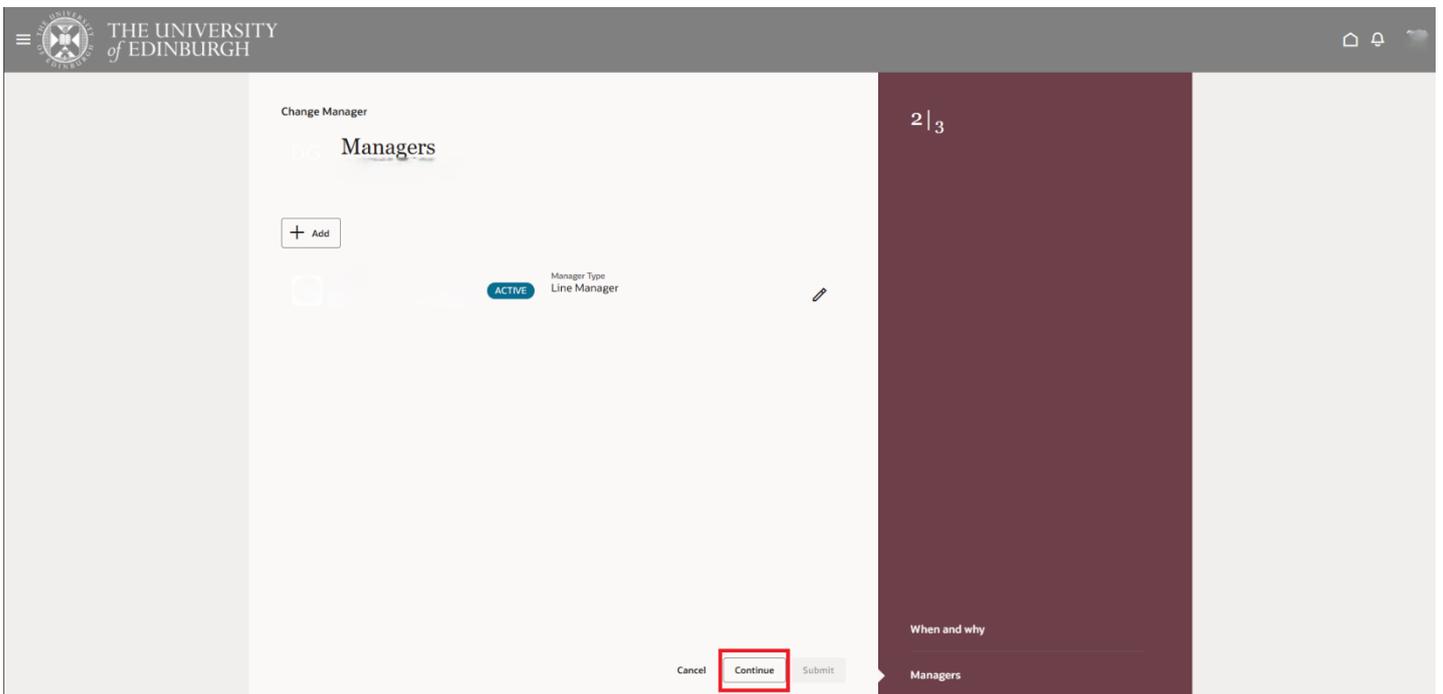


c. Click **Save**.



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**.

The screenshot shows the 'Change Manager' interface for 'Comments and attachments'. It includes a 'Comments' text area, a 'Save Comment' button, a 'Drag and Drop' area for file uploads, and a 'URL' field with an 'Add URL' button. At the bottom right, there are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red box. The right-hand side of the interface shows a dark sidebar with '3 | 3' at the top and 'When and why' and 'Managers' sections below.

Tip:

- If you enter a comment, you must ensure you click the **Save Comment** button before navigating to a different section on the right-hand side or submitting the change.

This screenshot is identical to the one above, showing the 'Change Manager' interface for 'Comments and attachments'. In this version, the 'Save Comment' button is highlighted with a red box, while the 'Submit' button is not. The rest of the interface, including the sidebar and form fields, remains the same.

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	Do not use.
Change of Location of Manager	The new Line Manager will be working from a different location
Change of Manager of Manager	SDA use only. 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">• Transferred guide to new template• Replaced all screenshots to reflect the new look of the Redwood screens	M Easton 01/08/25
1.1	23 February 2026	<ul style="list-style-type: none">• Updated for 26A – added tip for comments and attachments	RM/HH 17/02/2026

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.