THE UNIVERSITY of EDINBURGH

System User Guide

Line Manager – How to manage Team Learning

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Contents

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.

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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 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 Line Manager Guide to Skills and Qualifications.

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.

View Team Enrolments

1. From the homepage navigate to **My Team**, then Learning.
2. Select **My Team** from the lower left of screen. The screen defaults to viewing by **Learners**, you can also select to viewing by viewing by **Learning Items**.
3. Use the **filters** to refine your search, if desired.

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.

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. From the ellipsis (…) at the top, which shows more actions when you hover over it, choose one of the **Download** options to download enrolment data relevant to either your direct reports or your 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 homepage navigate to **My Team**, then Learning.
2. Select **Search** from the lower left of screen.
3. Enter a **keyword** 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** bottom left of My Team > Learning, 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.
4. Select **Assign** top right.
5. You can also assign learning from My Team > Learning > click on the **ellipsis** (…) at the top right of the screen > Assign Learning.

Recommend learning

1. Use **Search** bottom left of My Team > Learning, to find the item you'd like to assign and select it to expose more information.
2. Choose the option **Learn More**.
3. Select the **ellipsis (…)** to see more action options, then select the option **Recommend**.
4. Add **Comments** to explain why you are recommending the learning.
5. Search for the Learner(s) you want to recommend it to, in the **Recommend to this person** field.
6. More learners can be added by the **+Add** button. You can add multiple people to a recommendation.
7. Select **Recommend** from the top right of the 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 **ellipsis** (…) to see more action options, then select 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, select the **ellipsis** (…) to see more action options, then select the option **Record External Learning**.
2. Complete the required **information**.
3. **Add Learners**, with a note if desired.
4. Select **Record** from the top right of the screen.

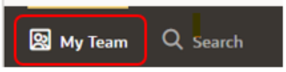
In Detail

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

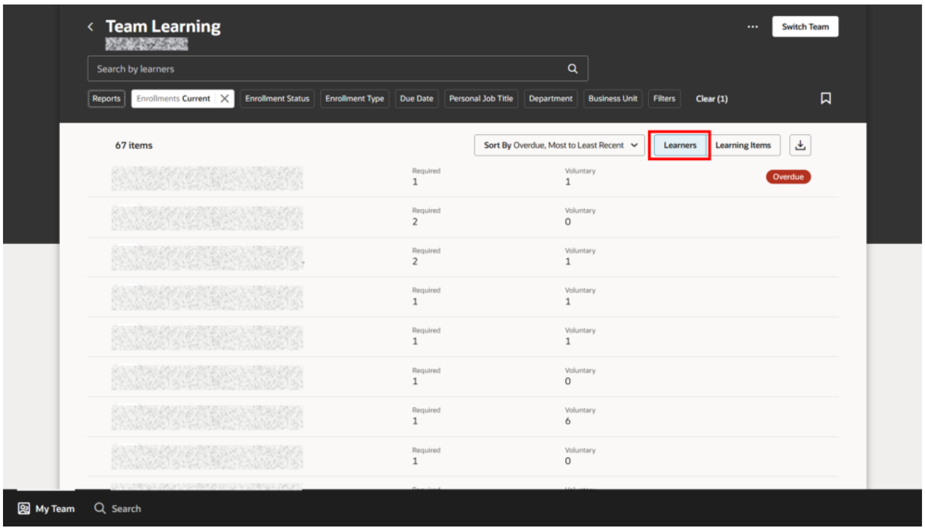
View team enrolments

View by Learners

1. From the homepage navigate to **My Team**, then **Learning**.
2. Select **My Team** from the lower left of screen (if it is not already selected).

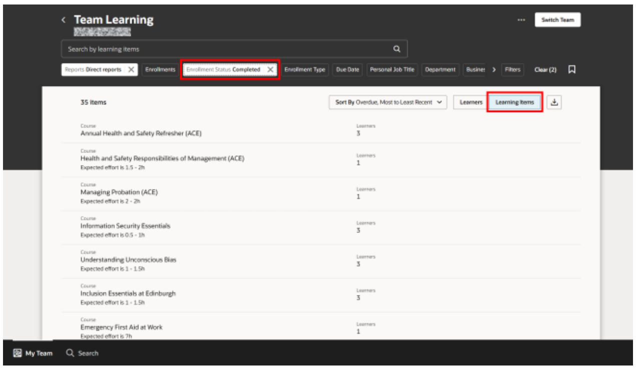


3. The screen will default to showing **Learners**. Use the **filters** to refine your search, if desired. You can combine multiple filters and clear them. You can switch the order of the display by using **Sort By**.
4. NOTE: If some of your team members do not yet have enrolments in Learning, they will not appear on this list.
5. For some learning items you may see a status indicator e.g. Overdue.



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.

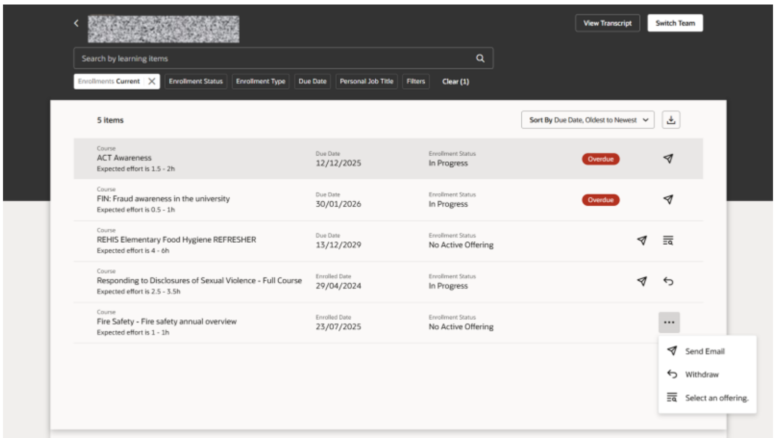


View/Edit a team members' current enrolments

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.

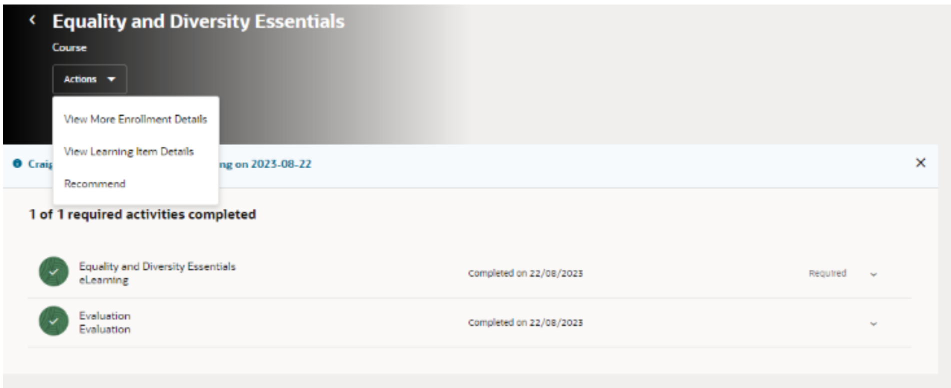
Tips

- 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 that for the top two enrolment, an arrow icon which will send an email to the individual; the third item also shows the icon to select an offering (lines with a small magnifying glass) as no active offering has been selected; and for the fourth item, also the withdraw icon (a curly arrow). In the last item in the image, the ellipsis (…) is selected to see all available actions for that enrolment.



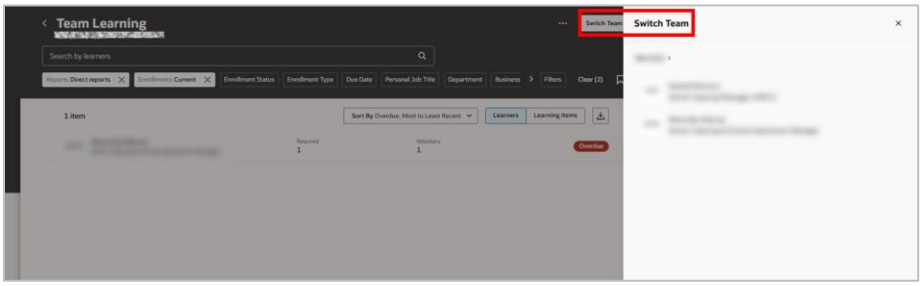
- Selecting an individual enrolment, allows you to see more detail on the team member's engagement with that course.

- 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

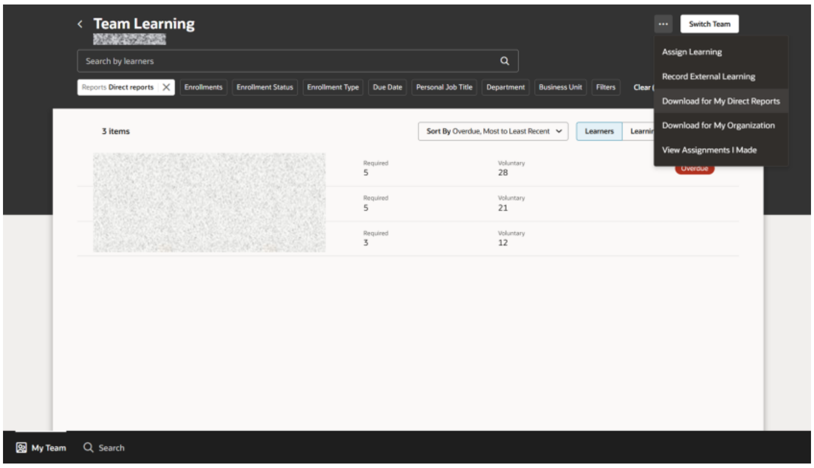
- From the Team Learning screen, you can use Switch Team again to explore learning activity in your direct reports' team.
- Using Switch Team again, you can explore learning activity in your organisational hierarchy.

Use reporting tools in Team Learning

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

More Actions (...) > Download

From the ellipsis (...) at the top, which shows more actions when you hover over it, choose one of the **Download** options to download enrolment data relevant to either your direct reports or your organisation (all employees in your reporting line).



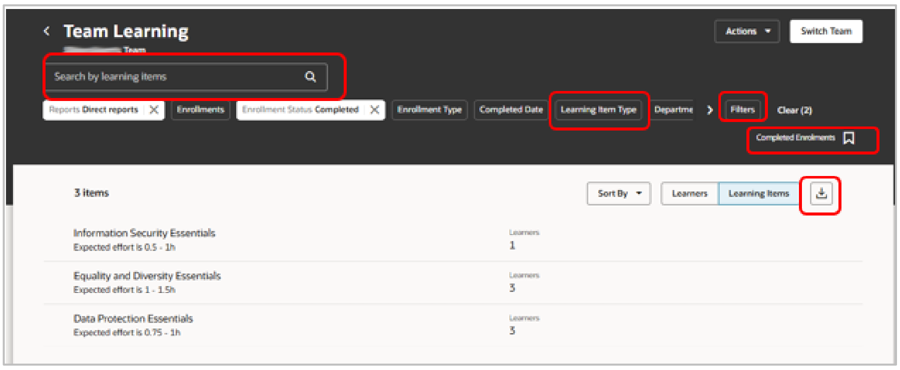
Tips

- 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, Rehires and Contingent Workers are not auto-enrolled.

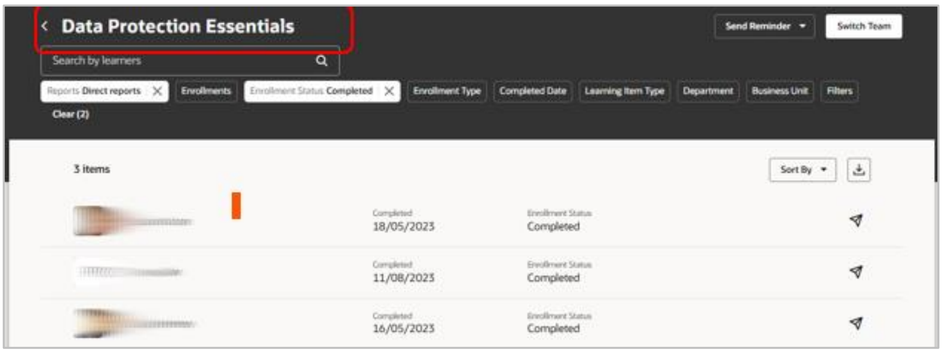
Using filters

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.

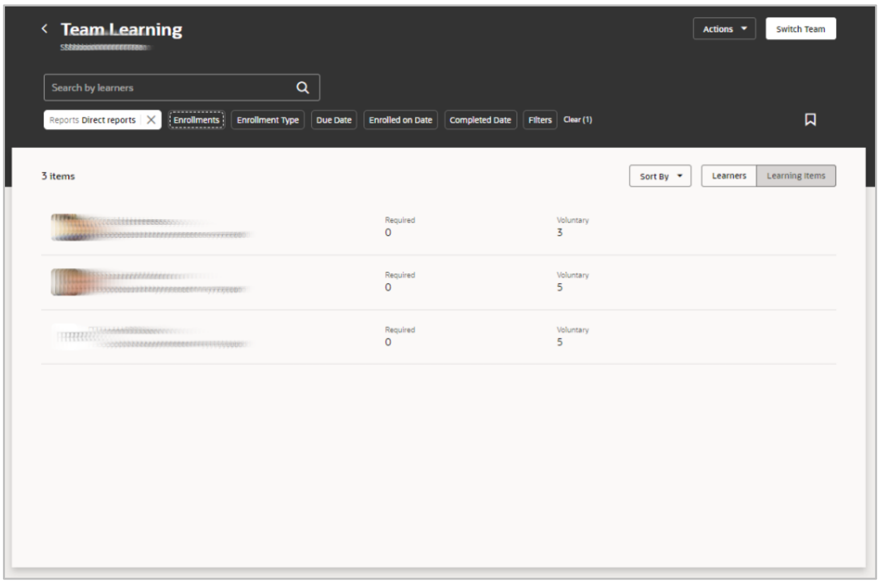


Tips

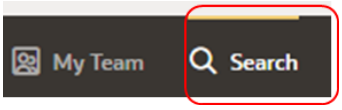
- You can use the bookmark icon to create and save a search for future use.
- Exporting from this type of search will show only the onscreen data in the downloaded file.
- Please ensure that any downloaded reports are stored in accordance with the University's Data Protection | Data Protection and Records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

Search the catalogue of learning

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

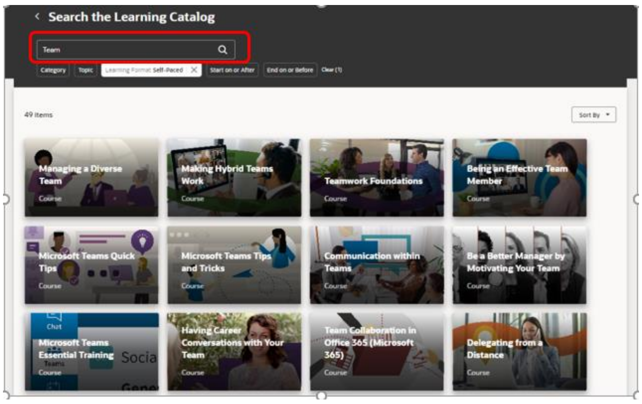


2. Select **Search** from the lower left of screen.



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 “Team” filtered to show only self-paced learning is shown below.

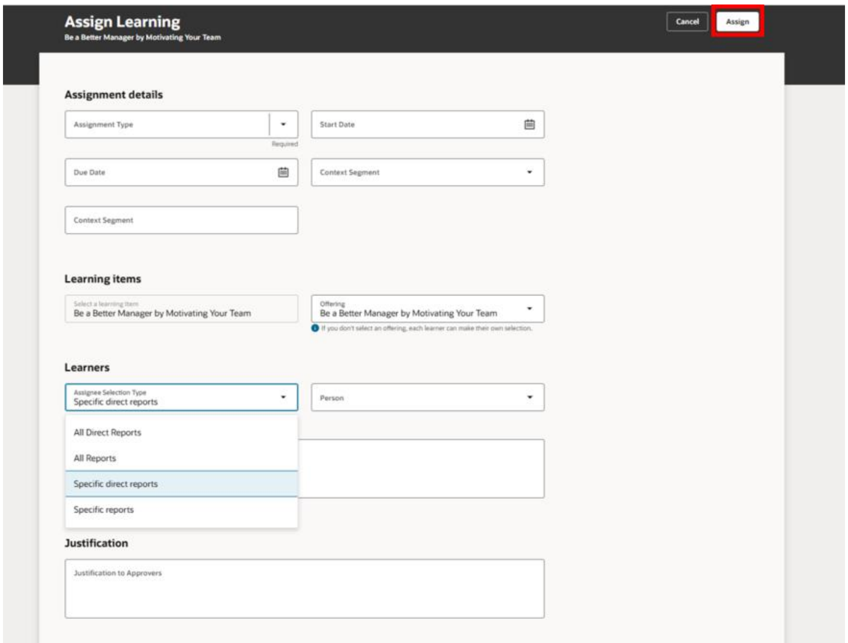


4. From the results hover on the course title, to show an extended information card with more information, where you can **Learn More** (see more details) or **Assign to My Team**.

Assign learning to your team

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

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



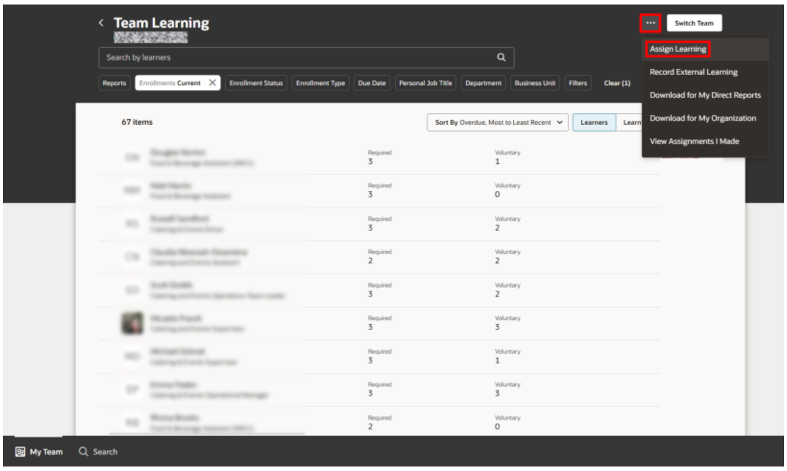
2. Complete the **Assign Learning** information:
   a. Assignment type:
      i. Voluntary – the assignee(s) can choose whether they enrol or withdraw
      ii. Required – the assignee cannot withdraw
   b. Start date – select today's date.

c. Due Date – select a future date.
d. Context segment fields should be left blank.

3. Select a **Learning Item**:
    a. If you searched for an item and selected it, the title will show by default in the Learning Item field.
    b. Select the offering title if you'd like to assign a specific offering.
4. Choose **Learners**, by selecting the appropriate information.
    a. Selection types available are:
        i. All Direct Reports to assign to everyone in your direct team.
        ii. All Reports to assign to everyone in your organisation i.e. including your direct reports' reports.
        iii. Specific Direct Reports, which will open a Person field to the right, showing a drop-down list of your direct reports, to select from.
        iv. Specific Reports, which will open a Person field to the right, showing a drop-down list of your direct and indirect reports, to select from.
5. Add a Note to Learners, if required.
6. Justification field should be left blank.
7. Select **Assign** from top right of the 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

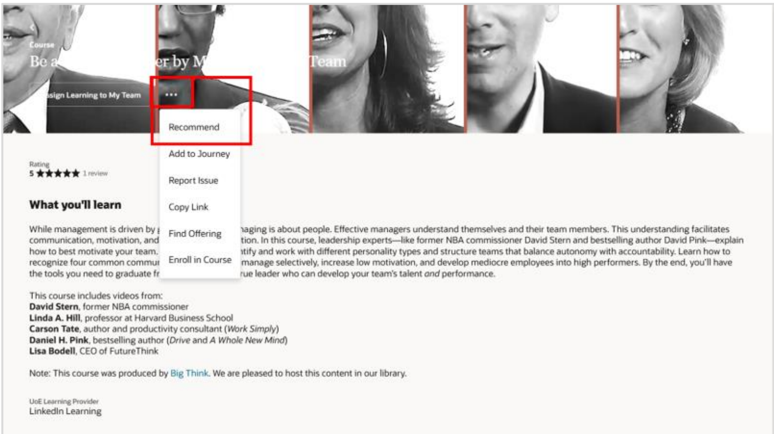
- You can also **assign learning** from My Team > Learning > click on the ellipsis (…) at the top right of the screen > Assign Learning.



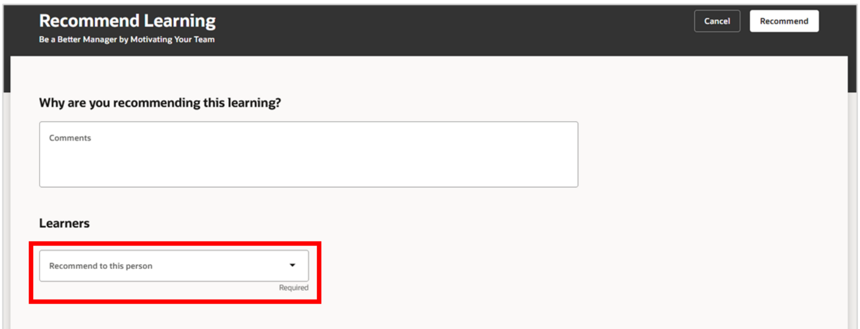
- Your hierarchy of reports in People and Money will affect the assignee selection type in the Assign learning screen. You may be able to select All Direct Reports, All Reports, Specific Direct reports or Specific Reports.

Recommend learning

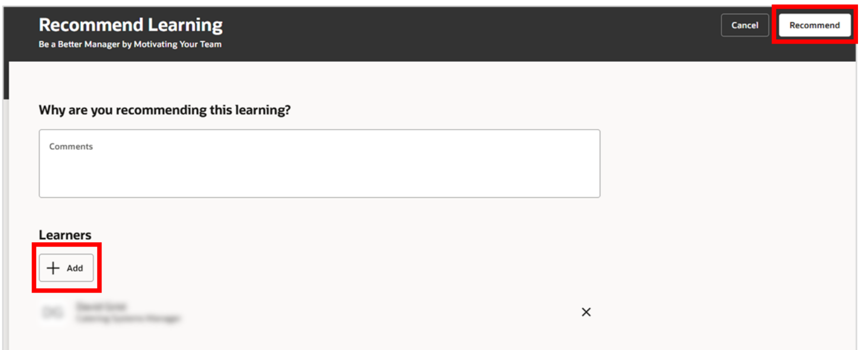
1. Use **Search** to find the learning item you'd like to assign. Select it to expose more information.
2. Choose the option **Learn More** to show the screen below.
3. Select the **ellipsis** (…) to see more action options, then select the option **Recommend**.



4. Add **Comments** to explain why you are recommending the learning.
5. Search for the Learner(s) you want to recommend it to, in the **Recommend to this person** field.



6. More learners can be added by the **+Add** button. You can add multiple people to a recommendation.
7. Select **Recommend** from the top right of the screen.

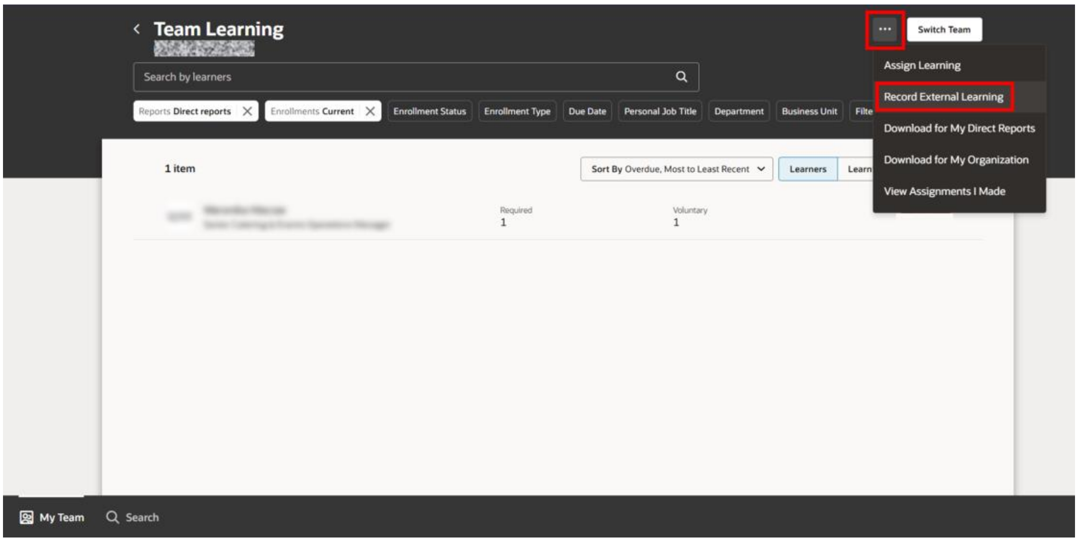


Copy links

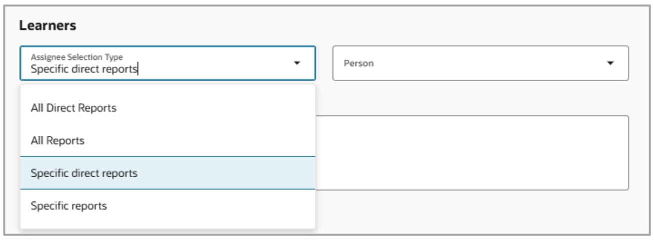
1. Use **Search** to find the learning item you would like to share a link to and select it to expose more information.
2. Choose the option **Learn More**.
3. Select the **ellipsis** (…) to see more action options, then select the option **Copy Link**.
4. The link will be copied to your computer clipboard for onward use.

Record external learning

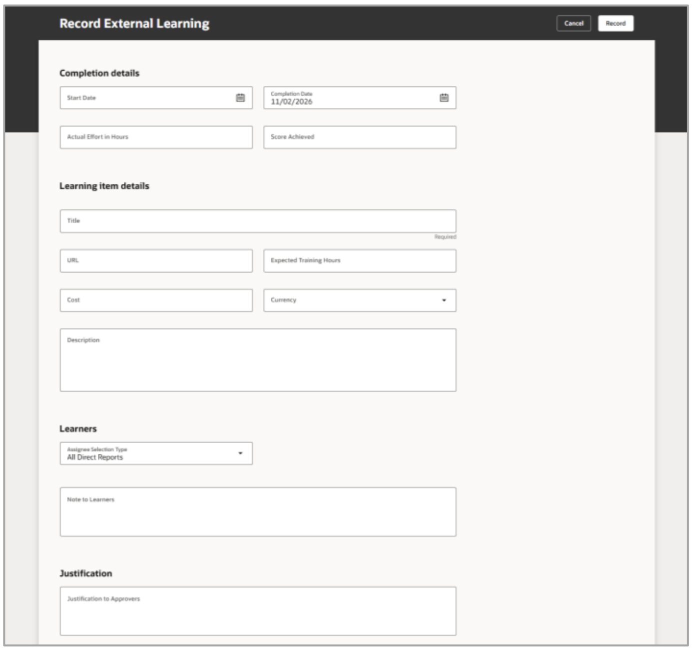
1. From the My Team Learning screen, Select the **ellipsis** (…) to see more action options, then select the option **Record External Learning**.



2. The only required fields to complete tare as follows:
   a. Completion Details - Start date and update the completion date
   b. Learning Item Details - title and description
   c. Learners – In the Assignee Selection Type field, add Learners, with a note if desired. Select from the drop-down and if prompted, select the Person(s) you are recording the external learning for. You can add multiple people here, if required.



   d. There is no need to populate the Justification field
3. Select **Record** from top right of screen.


Record External Learning
Cancel
Record
Completion details
Start Date
Completion Date
11/02/2026
Actual Effort in Hours
Score Achieved
Learning item details
Title
Required
URL
Expected Training Hours
Cost
Currency
Description
Learners
Assignee Selection Type
All Direct Reports
Note to Learners
Justification
Justification to Approvers

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0		First version for publication	ME
2.0	Feb 2025	Changes to viewing team learning	ME
2.0	16 Feb 2026	Updated to 26A functionality	SK

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.