System User Guide

Employee: How to manage your learning

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Contents

Introduction

This guide covers key tasks 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, 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.

Courses may be instructor-led in a classroom, be delivered virtually using e.g. Teams, or be self-paced e-learning 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 line manager and agreed in advance of enrolment. This may occur as part of your annual review or during your ongoing one to one conversation. Further information to support you is available in the Conversations Hub.

Please note that the system terminology uses American spelling, for example 'catalog', 'license', etc. Where there is reference to specific system fields, this guidance will use the system terminology.

Before you start, please familiarise yourself with the Guide to Learning, Skills and Qualifications for Employees.

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.

How to access the Learning app
1. From the People and Money **homepage**, select **Me**, then select the **Learning** app.
2. You will see a screen with two key menu items on the bottom left of the screen: Learning Catalog and My Learning.

My Learning Experiences
1. From the **Learning** app, select **My Learning** at the bottom left of your screen.
2. This opens the **My Learning** Experiences screen which is the main screen for learning where you can complete and track your own learning activities in People and Money.

Learning Catalog
1. From the **Learning** app, select **Learning Catalog** at the bottom left of your screen.
2. In the **Learning Catalog** screen, you can explore available courses, learning resources and learning communities, curated into categories and topics that may be of interest. You can also search for relevant courses and learning resources, using search keywords or filters.

Enrol on an instructor-led course
1. From the Learning Catalogue screen in the Learning app, **find the relevant course**.
2. Select the course tile to see more information, and actions to **Enroll**, **Learn More** or **Add to Journey*.**
3. Select the **Learn More** button to see full details of the course, including available offerings (instances).
4. Select the **Enroll** button next to the date for which you wish to enrol.
5. From the next details screen you can select **Download Invite** to download an iCal to add the course to your Outlook Calendar.

Enrol into self-paced learning
1. From the Learning Catalog screen in the Learning app, find the relevant self-paced learning.
2. Select the course tile to see more information, and actions to **Enroll**, **Learn More** or **Add to Journey*.**
3. Select the **Learn More** button to see full details of the course.
4. Select the **Enroll** button to enrol into the self-paced learning.

Record external learning
1. From the **Learning** app, select **My Learning** at the bottom left of your screen. This opens the My Learning Experiences screen.
2. Select **Record External Learning** at the top right of the screen.
3. In the next screen, **complete the information** relevant to your external learning.
4. Select **Record** at the top right of the screen, to finish recording the external learning in the system.
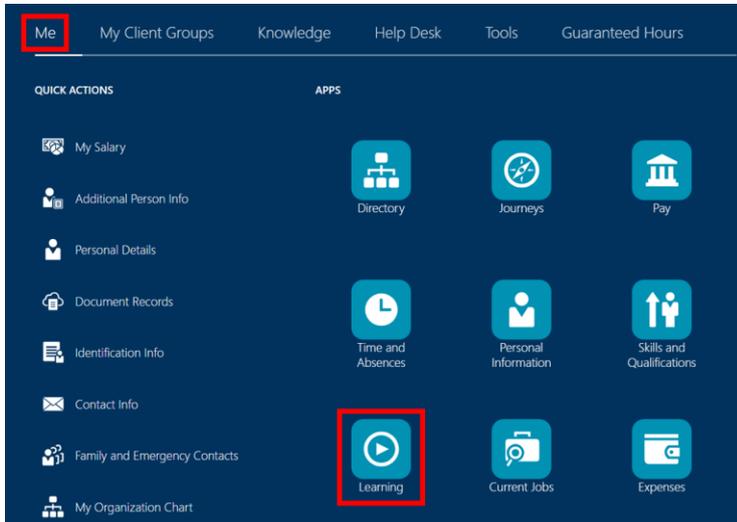
* We do not use the "Add to Journey" functionality at the University of Edinburgh.
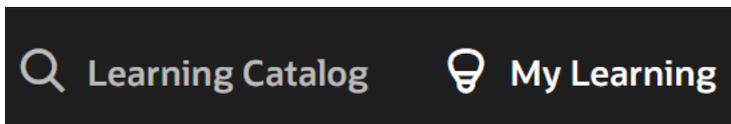
In Detail

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

How to access the Learning app

1. From the People and Money **homepage**, select **Me**, then select the **Learning** app.

2. You will see a screen with two key menu items on the bottom left of the screen: Learning Catalog and My Learning.

My Learning Experiences

This is the main screen for learning which allows you to view, search and engage with your current and previous learning enrolments and is the default screen in the Learning app.

All your enrolments are shown here. Each course tile gives detail of your status and can be selected for more information and actions.

Courses shown are a mix of required and voluntary learning that either you or your manager have enrolled you on, that you have been assigned, and recommendations made by colleagues.

From this screen, you can:
- See a list of courses you are enrolled on, with an indicator that shows your status on each course
- Use filters to change the display of items by enrolment status and date
- Change the sort order to your preference
- Select any tile to view more details on each of your enrolments and take actions on that enrolment, e.g. resume learning that has been previously started or withdraw from learning
- Record external learning not booked using People and Money.

1. From the **Learning** app, select **My Learning** at the bottom left of your screen.
2. This opens the **My Learning Experiences** screen which is the main screen for learning where you can complete and track your own learning activities in People and Money.

3. When opening an individual learning item, you can take a number of actions from the menu top right:
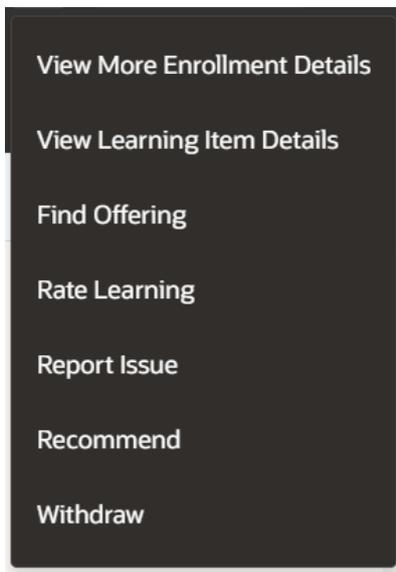

- **View More Enrollment Details** opens a side screen with more information on your enrolment of a self-paced learning item, e.g. when you started and completed the learning.
- **View Learning Item Details** will provide you more details on the learning item. This is explained more further in the guide.
- **Find Offering** displays a list of available offerings of the learning for you to select your preferred option
- **Rate Learning** encourages you to share your experience of this course with other staff by adding a star rating and comments, with your name shown. Note: Learning Providers often send learners feedback surveys to ask for more detailed feedback.
- **Report Issue** lets you anonymously contact the owner of this learning with feedback or about issues.
- **Recommend** is where you can recommend this learning to colleagues, and that recommendation will appear in their My Learning Experiences screen.
- **Withdraw** allows you to cancel your enrolment on incomplete learning that you have enrolled on yourself or has been assigned to you as Voluntary by your manager, or automatically. You may not withdraw from a Required learning assignment

Tips
- Use **Search learning enrollments** top left to find items in your learning record by entering words from

the course title and selecting the magnifying glass to search.

- Use the **filters** for Enrollments, Completed Date, and Enrolled on Date to refine your search.
- You can also **sort** your results by Due Date, Most recently assigned, Most recently completed and alphabetically by Title, by using the Sort By function on the top right.
- You can **view Learning Communities** you are a member of or which you manage by selecting View My Learning Communities top right.
- All 'tiles' display information on **Learning Format** e.g., Course, Official Community, Topic Community, etc.
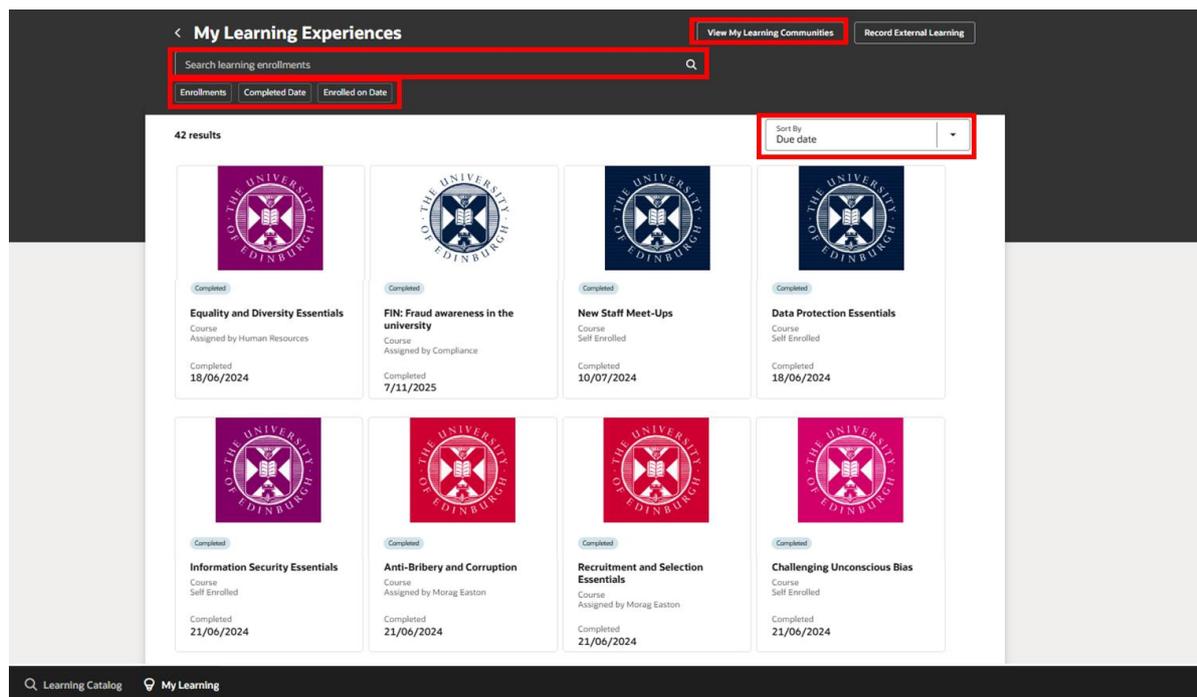
Learning Catalog

In the **Learning Catalog** screen you can explore available courses, learning resources and learning communities, curated into categories and topics that may be of interest. You can also search for relevant courses and learning resources, using search keywords or filters.

1. From the **Learning** app, select **Learning Catalog** at the bottom left of your screen.

2. This opens the **Learning Catalog** screen.
3. To **browse** learning within the **Learning Catalog** screen, select any of the categories from the **horizontal menu** to see a list of courses, learning resources, and learning communities that our University Learning Providers have curated into categories and topics that may be of interest.
4. Select **Topic Index** top right to view a full index of topics. You can view the index by category or alphabetically. You can follow **topics** of interest to you by selecting the Follow icon next to it (⊠).
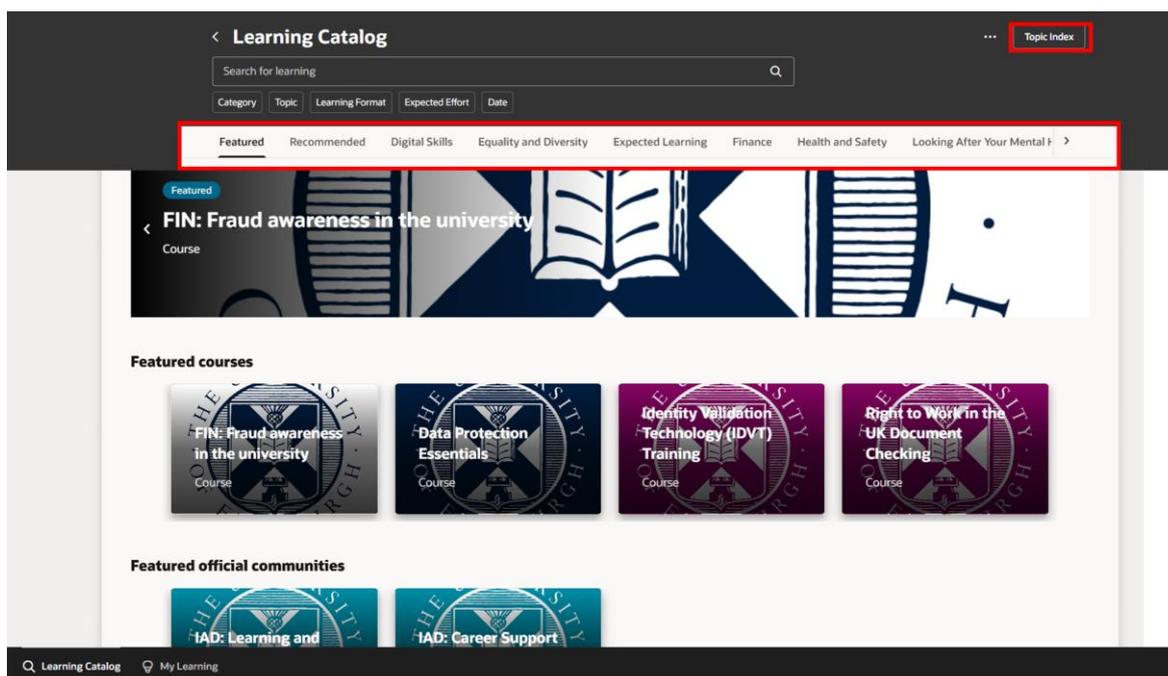
5. To **search** for learning on specific topics, enter keywords from the course title or description in the **Search for learning** box.

6. You can use **filters** to enhance your search - by category, topic, learning format or date.
7. You can change the **sort order** of search results to your preference within the Sort By dropdown on the right.
8. From the Learning Catalog, you can **enrol** on courses that are of interest to you.
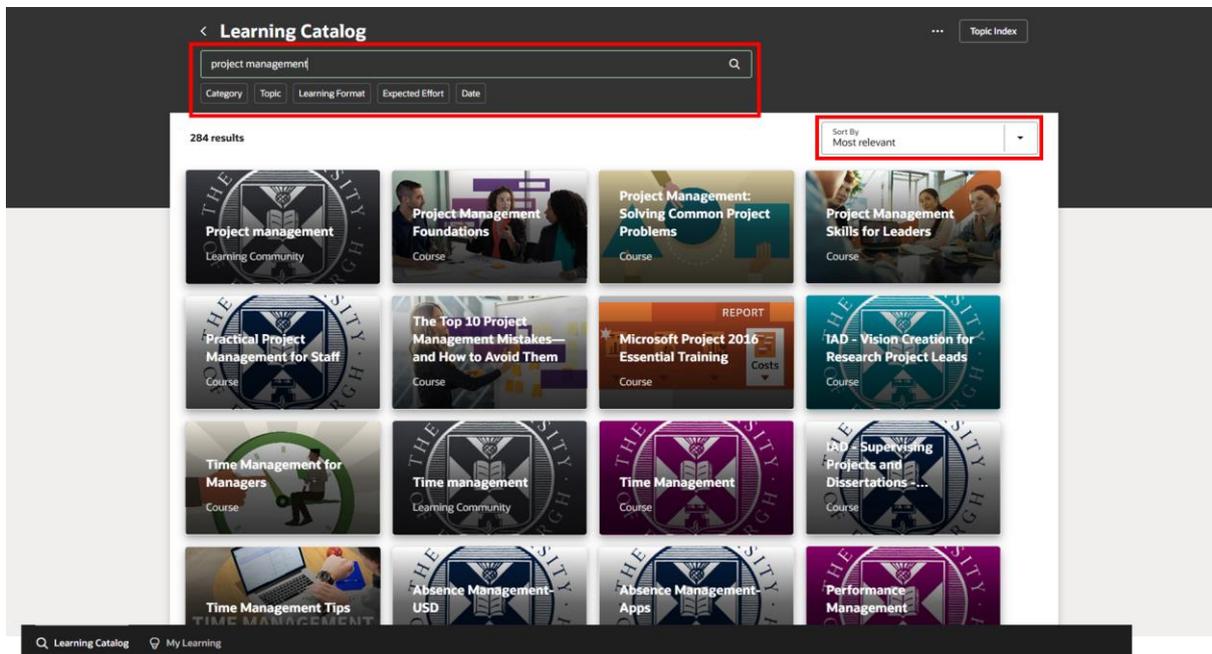
Tips

- You can recommend courses or learning items to colleagues. You can view recommendations that you have made to colleagues.
- All 'tiles' display its Learning Format e.g., Course, Official Community, Topic Community, etc.
- You can view the Learning Communities for those that you are a member of or which you manage.

Enrol on an instructor-led course

Instructor-led learning may be in a physical location, delivered online, or be delivered in a hybrid way.

1. From the Learning Catalog screen in the Learning app, **find the relevant course**.
2. Select the course tile to see summary information, and actions to **Enroll**, **Learn More** or **Add to Journey**. Please note we **do not use** the "Add to Journey" functionality at the University of Edinburgh.

3. Select the **Learn More** button to see full details of the course.
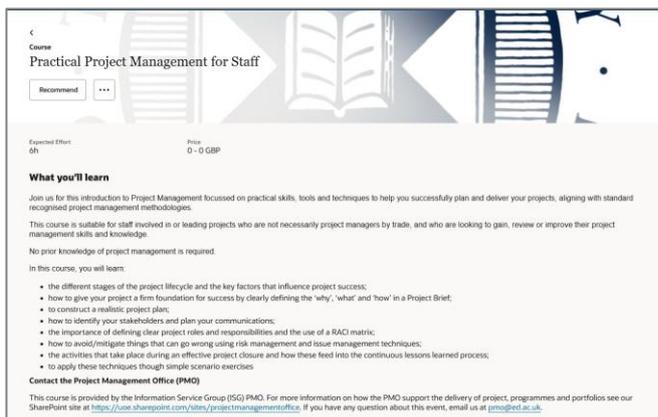
4. Scroll down in the next screen, to see the **dates of available offerings** (instances of the course). Select **Enroll** next to the date for which you wish to enrol.

5. Alternatively select **Enroll** in the initial screen, which will enrol you into the course but not a specific offering. The next screen will show the list of available dates. Select the **Select** button next to the
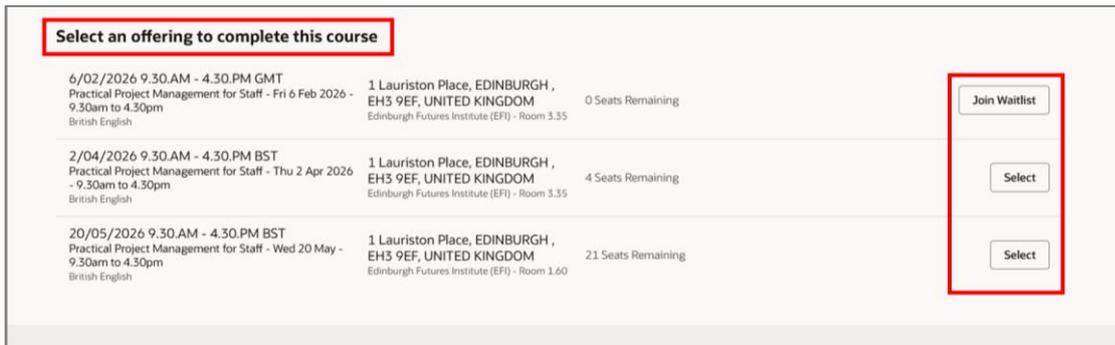
date for which you wish to enrol.

6. For some courses, you may see a screen which has details of different **activities** for this offering. Expand the detail of each activity using the down arrow to the right of the activity to see more information.
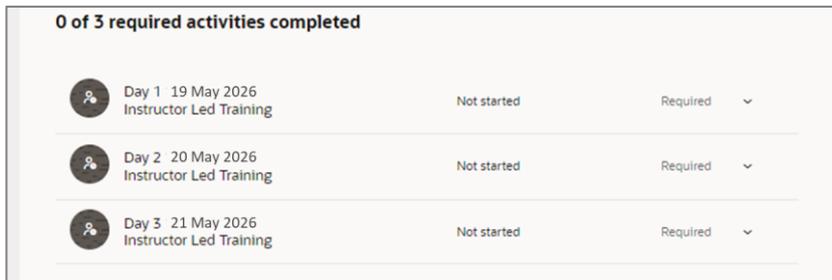
7. From the offering details screen you can select **Download Invite** to download an iCal to add the course to your Outlook Calendar. You will also receive bell notifications and email alerts relating to this enrolment a few days before the activity as a reminder.
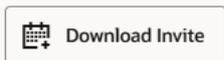
8. If the learning is a **virtual** instructor-led session, you will see a **Join** or **Join Conference** button. If accessing the screen too long in advance, you will see a message similar to this, "You can join the virtual conference 5 minutes before its start time". You can also join from the iCal if you have downloaded this to your Outlook Calendar.
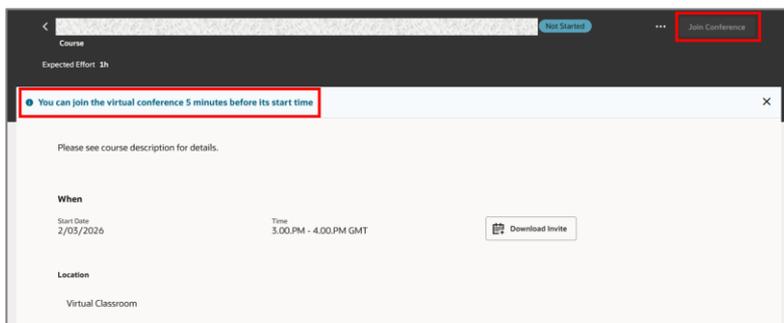
Tips:

- The enrolment process is the same for all instructor-led learning, no matter how you find it in the Learning Catalog.
- Remember to check the details in the offering title before you select **Enroll**.
- Remember to **download the invite** to pop in your Outlook calendar, as it does not happen automatically when you enrol.
- If there are no available offerings, you can **enrol on the course** and check back regularly to see if any offerings have been added.
- You can add yourself to the **waitlist** of an offering that is fully booked and you will get a notification if a space becomes free.
- If you book yourself onto one **offering** and then subsequently book yourself on a different offering, the initial booking will be cancelled.
- If you can no longer attend an instructor led learning, you should **withdraw** yourself from within Learning in People and Money as the instructor will be expecting you. Declining the Outlook calendar invite, will not withdraw you.
- There is **no approval process in Learning**. If required, you should consult with your manager about being released to attend training.
- You may see different Actions to the example above, as this is context sensitive.
- Available Actions depend on the status of your enrolment, and the type of learning.
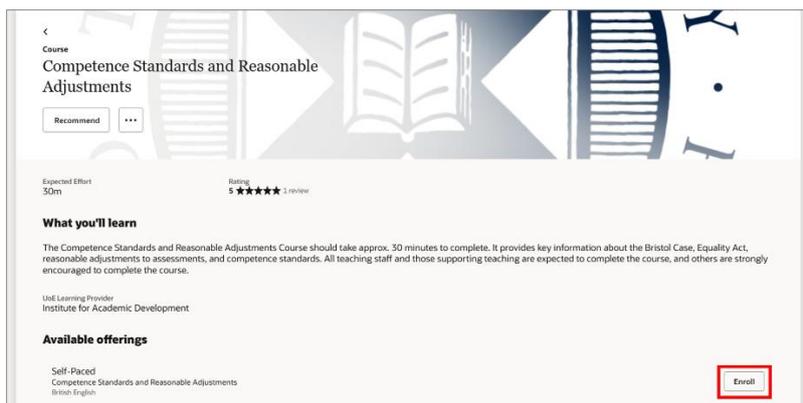
Enrol into self-paced learning

Self-paced learning is learning which, after you have enrolled in it, you can complete at your own pace, at a time that suits you.

1. From the Learning Catalogue screen in the Learning app, find the relevant self-paced learning.
2. Select the course tile to see more information, and actions to **Enroll**, **Learn More** or **Add to Journey**. Please note we **do not use** the "Add to Journey" functionality at the University of Edinburgh.


3. Select the **Learn More** button to see full details of the course.

4. Select the **Enroll** button to enrol into the self-paced learning.
5. As described above for instructor-led learning, for some courses, you may see a screen which has details of different activities for this offering. Expand the detail of each activity using the down arrow to the right of the activity to see more information.
   In this example, you will see this enrolment has two activities to complete, the e-learning and an evaluation.
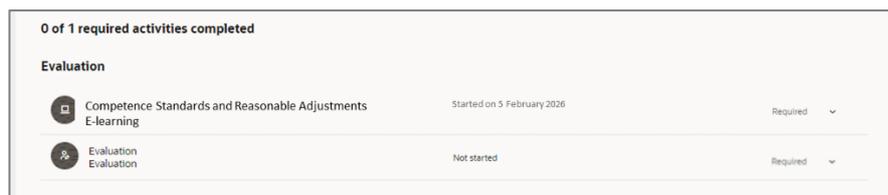
6. To access the learning, select the **Launch** button next to the title to start the self-paced learning item. Note if you previously started the learning, you would see a **Resume** button instead.
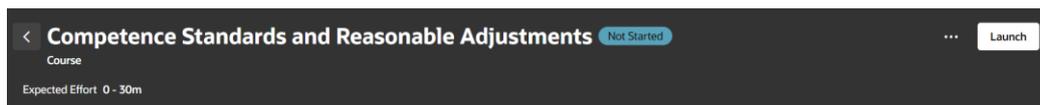
7. The **Take Again** button allows you to re-enrol and complete a course or learning item a second time, usually after you have already completed it once. This is typically used where the learning is a required learning that typically has a 2- or 3-year renewal cycle.

8. You may also see a **View Content** button, which allows you to access the material of a completed course for reference, without creating a new enrolment or changing your current completion status.


Tips:

- Self-paced learning available is from a variety of different publishers, and you should expect different courses to look and behave differently.
- The enrolment process is the same for all instructor-led learning no matter how you find it in the Learning Catalog.
- You may see different Actions to the example above, as this is context sensitive.
- Available Actions depend on the status of your enrolment, and the type of learning.
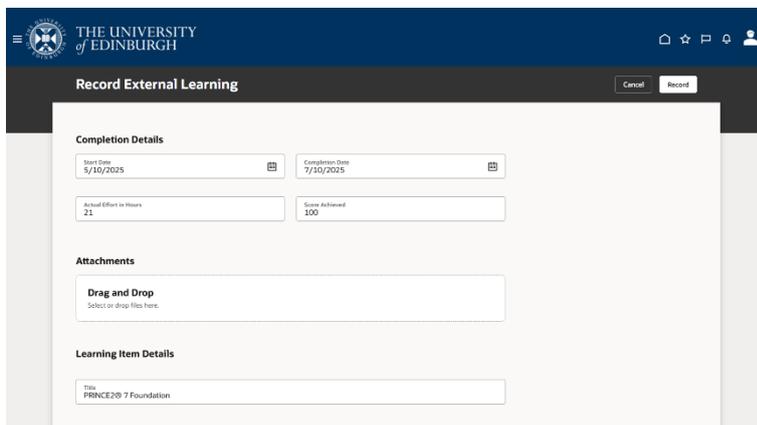
Record external learning

A good way for you to keep track of Continuous Professional Development (CPD), is to record relevant learning taken outside the University in your learning record within People and Money, which makes it visible to your line manager.

1. From the **Learning** app, select **My Learning** at the bottom left of your screen. This opens the My Learning Experiences screen.
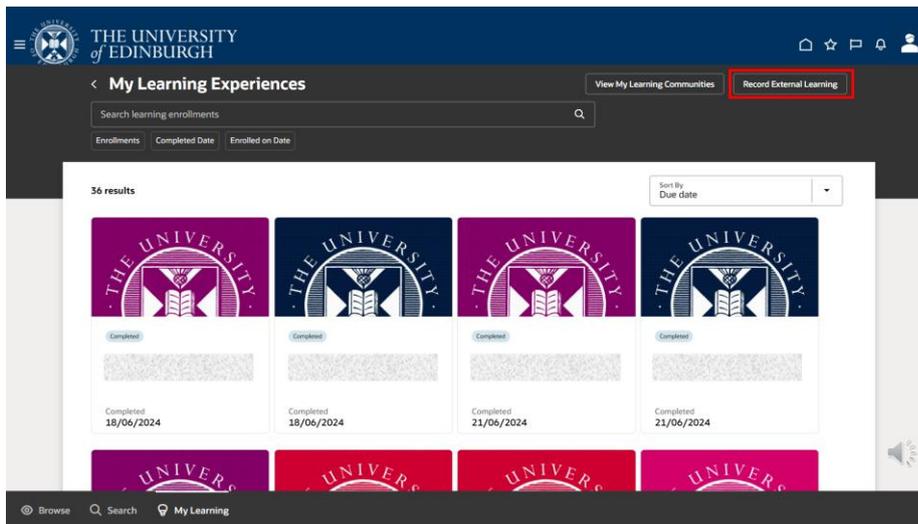
2. Select **Record External Learning** at the top right of the screen.
3. In the next screen, **complete the information** relevant to your external learning.

4. Select **Record** at the top right of the screen, to finish recording the external learning in the system.

5. You will see your learning recorded in My Learning Experiences, with a status of **Bypass Complete**.

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
1.0		First version for publication	ME
2.0		Updated version	ME
3.0	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.