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 Accessing Learning, Skills and Qualifications for Employees and Learners.]

The new People and Money Learning app, is a centralised space for staff and line managers, where they can search for 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) have moved most staff learning into the Learning Catalogue on 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.

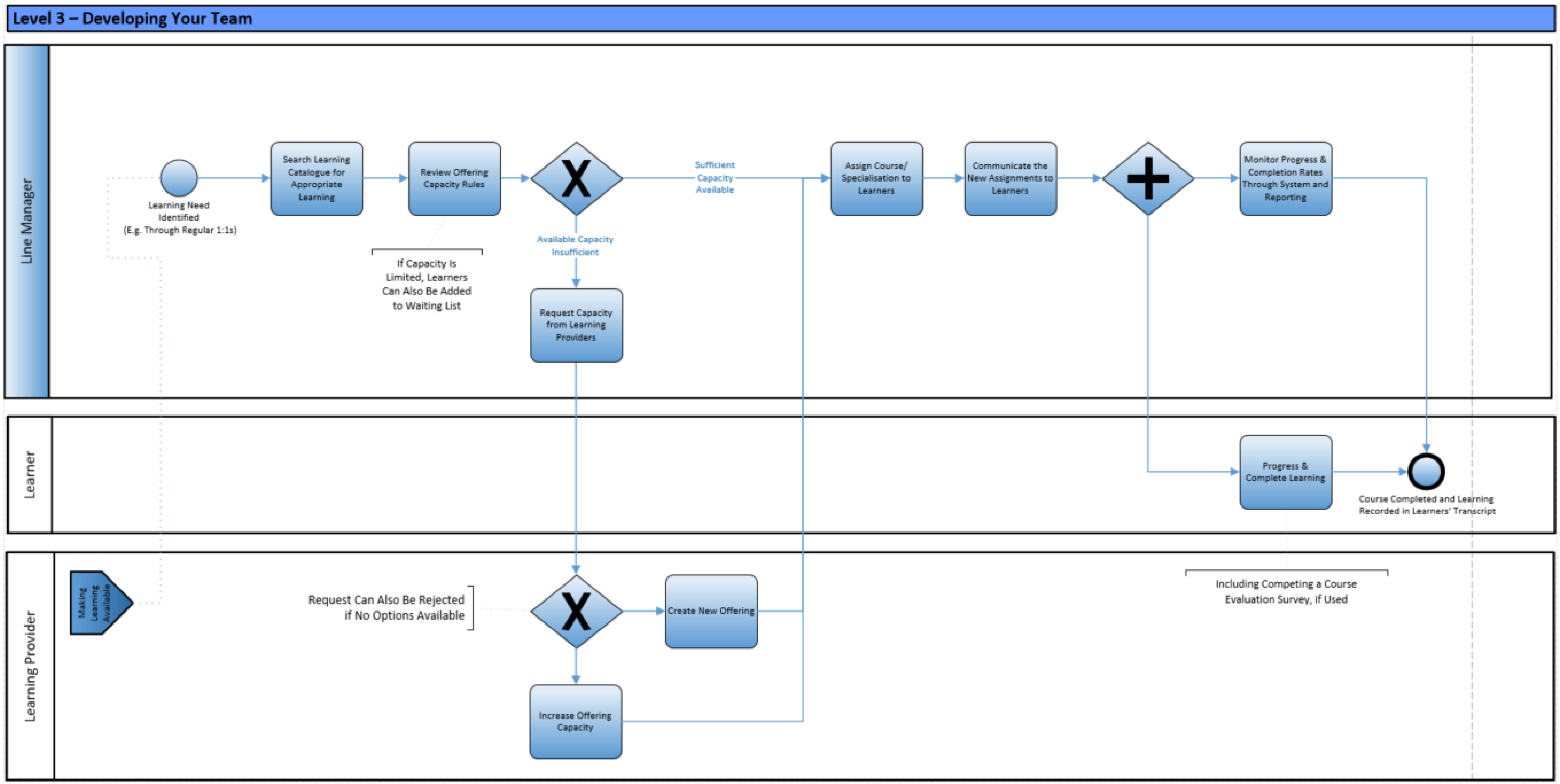
Please note that the system terminology uses American spelling, for example ‘catalog, specialization, license’ etc. This document has been written using British English.

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 are instructor-led, and some elements are 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. Learners will have learned the same things which ever offering they complete.
Delivery Mode	How the course or learning is given – either instructor-led, self-paced or blended
External (Noncatalog) Learning	Learning completed outside of People and Money Learning, which you want to record within the system using the action "Record External Learning Experience" this is then visible in your transcript 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 P&M, either Instructor or Training Supplier, to describe the person delivering the training, whether in person or online. Instructors are university staff within P&M 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 Catalog	The searchable catalogue of learning (includes Courses, Offerings, Communities, Specialisations)

Learning Provider	The department or area that provides certain learning activities. You can search the Learning Catalogue by 'Learning Provider', to see for example all the courses which are provided by 'Health and Safety' or 'HR' etc.
Learning Record	The employee's record within P&M 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 P&M.
Self-Paced Learning	The learner decides when to complete the learning, normally this will be an eLearning course.
Specialization	A specialisation is a logical grouping of courses aimed to help learners achieve learning goals in a larger learning objective.
Voluntary Learning Assignment	Learning that the learner chooses to undertake, which has been assigned. Assigned learning can be for a course or an offering.

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.
Line Manager	All members of staff with have direct or matrix -style management responsibilities for the employee or team. Line Managers have access to Learning, Skills and Qualifications for themselves and their team.
Learner	Employees within the University. NOTE: Agency Workers and visitors do not have access to People and Money - Learning
Learning Provider	Staff that design and provide learning within the University

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 and Videos 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 & 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 your direct reports' learning and skills & qualifications records • Access to learning reports	• Assign and/or recommend learning to your direct reports individually, or as a group, including new hires • View and track your team's learning activities and progress through a dashboard/ report • View your team's skills and qualifications, • Approve essential Licences, Certificates and Registrations

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 (including toolkits) 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 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.

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 Tool-box 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 transcript 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.

Note that some learning is automatically assigned as part of the new start experience. This is learning that the university expects all staff to complete.

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

Please watch the user videos and search My Knowledge for support in the first instance. Follow the P&M user guide 'How to search my knowledge'. If you cannot find the information required, raise a service request, following the P&M 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** be automatically added to a learning record. The record of completed learning can however be added manually by the employee or manager, if desired.
- 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.

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. 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 will grow and develop over time. You can either browse the catalogue, or search for a specific key word to see what is available.

Managers can *assign* and *recommend* learning to their direct reports, either to individuals or to a group. For example, for your team.

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 in their transcript.

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

- Voluntary learning – when learning is assigned as voluntary it is the learners decision when, how and (in some cases) if - they will complete the option. The employee will still have the option to withdraw from the enrolment. The manager can optionally add a completion date or leave this blank.
- Required learning will appear as a task (to be completed) with a set completion date. Employees cannot withdraw from a required assignment. Manager and Learning Providers can withdraw/cancel employee's required enrolments. Please note that required learning assignments that are not completed by their due date will trigger future email notifications to both you as a manager and the learner.

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. <u>In most situation it is best to assign at the course level as the employee can make the choice for when to do the learning</u>. If you wish to assign a specific offering to a member of staff or team, you should first check their availability to attend.

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

The P&M User Guide – Line manager – How to manage team learning and P&M User Guide - Line manager - How to Track, Edit or Cancel Direct Reports Enrolments support managers in this process.

Waiting Lists

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

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 P&M User Guide - Line manager – How to Track, Edit or Cancel Direct Reports Enrolments 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 syllabus within the learning catalogue.

Communicating with the Learning Provider

If you have questions about a course, specialisation or offering you should contact the Learning Provider, details of this can be found in the course syllabus within the learning catalogue.

Viewing Course Completion and Learning Activities

Line Managers can:

- view their direct reports' learning record, including the status of their courses, 'Enrolled' or 'Completed'.
- access reports on learning activities undertaken in People and Money via the 'Line Manager Dashboard' app. This returns data for the line manager's direct and indirect reports. If you are a line manager who is also a School/Department Administrator, you can see data for your Area of Responsibility. There are two tabs available in the Line Manager dashboard in respect of Learning, Skills and Qualifications; namely, the Learning Transcript showing a detailed view of team learning and the Certificates Overview, showing an overview of certificates held within the team.

Please note that data within the Line Manager dashboard will take time to build up as learner's complete courses or update their certificates. There was no transfer of historic data to People and Money at launch.

The P&M User Guide – Line manager - How view the Line Manager Dashboard (please note this is available under the 'General' heading on the user guide webpage), supports managers with how to use the Line Manager Dashboard.

Adding external learning or previously completed learning to your direct reports learning record

A good way for a learner to keep track of continuous 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.

The P&M User Guide - How to record an external learning experience provides further information on how to add external learning.

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).

The P&M User Guide - Line manager – How to Review, Approve and Update Skills and Qualifications provides further information.

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>Add missing content to option lists.

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.

Appendices

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 will have full access to the Learning, Skills and Qualifications Apps in People and Money.