People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email hrhelpline@ed.ac.uk.

How to Record External Learning

Employee

Line Manager

Estimated time to complete: 15 minutes

Introduction

Recording External Learning Experience offers a way to add additional learning history to the People and Money Learning Transcript. This is helpful for recording completion of activities that are held within the University but not organised using People and Money Learning. Or it can be used for recording activity completed externally.

For example, in Estates, teams run Tool-box talks, the line manager can easily record these using the 'Record External Learning for my Team' action.

Alternatively, this can be used by you to record the CPD learning you complete for your professional registrations.

In Brief...

This section is a simple overview and should be used as a reminder.

Employee - How to record my own External Learning Experience

1. From the Home page select **Me**, then click **Learning**.
2. Select **What to learn** or **View Transcript** - From the **Actions** button select the option Record External Learning Experience
3. Complete the fields within the **Learning Item Details** Section.
4. Complete the **Learning Record Details** and **Related Materials sections**.
5. Press **Submit** .

Line Manager - How to record External Learning Experience for my Team

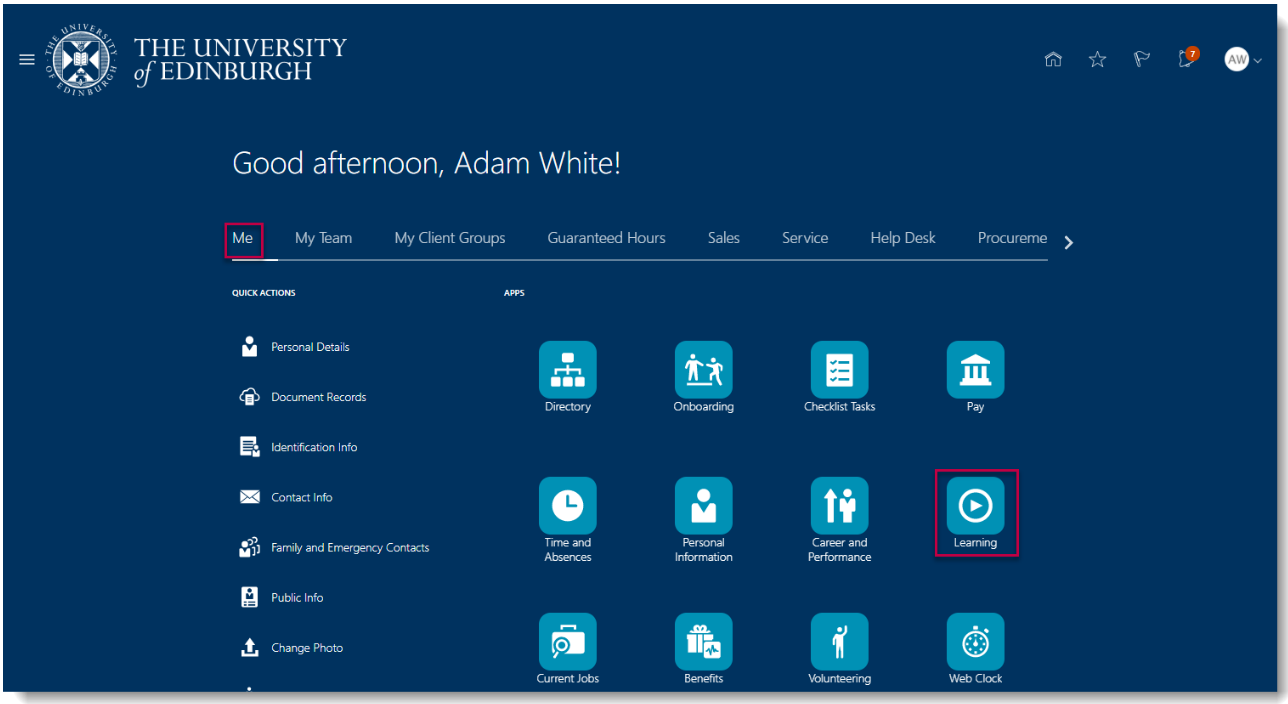
1. From the Home page select **My Team**, then click **Learning**.
2. From the **Actions** button select the option **Record External Learning for My Team**
3. Complete the fields within the **Record External Learning for My Team** Sections.
4. Press **Continue** to move between sections
5. Press **Submit**

For detailed guidance, see the next section.

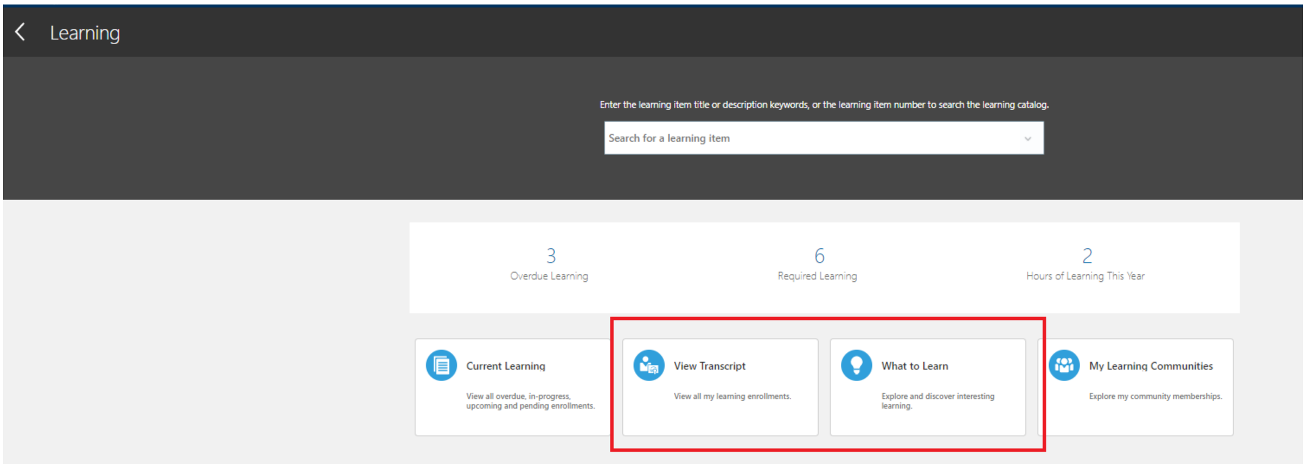
In Detail…

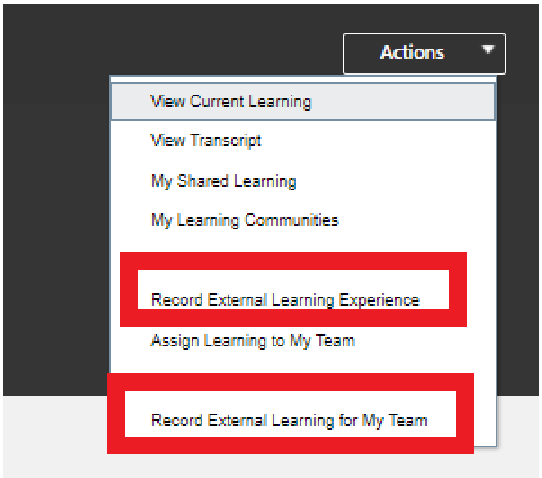
Employee - How to record my own External Learning Experience

1. From the Home page select **Me**, then click **Learning**.



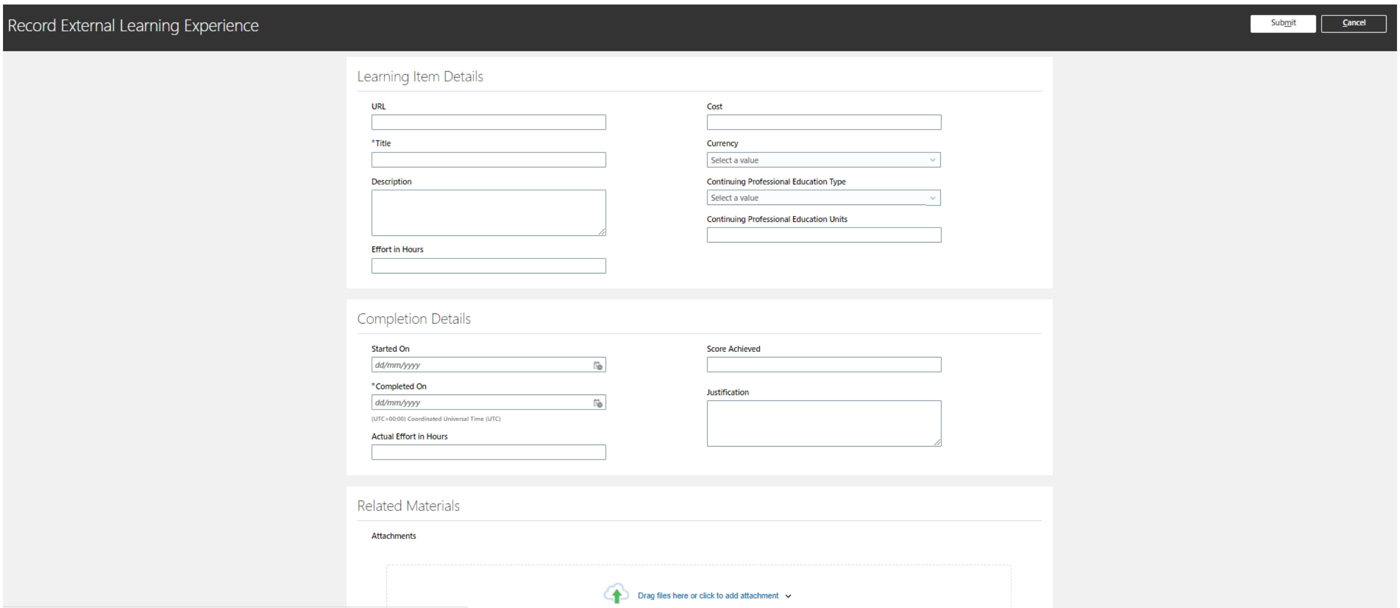
2. Select What to learn or View Transcript - From the **Actions** button select the option Record External Learning Experience





NOTE: If you are a line manager you will have other options visible – such as Record External learning for My Team – this option can be used to do this task.

3. Complete the fields within the **Learning Item Details** Section.



The **Title** is a mandatory field

NOTE: If you select a value in Continuing Professional Education Type – there field Continuing Professional Education Units also becomes mandatory.

If there are no units gained from this external learning use the numeric value ‘0’.

4. You are also required to complete the **Learning Record Details** and **Related Materials sections.**

Record options after the learning is complete. The Completed On field is mandatory and you cannot add dates into the future.

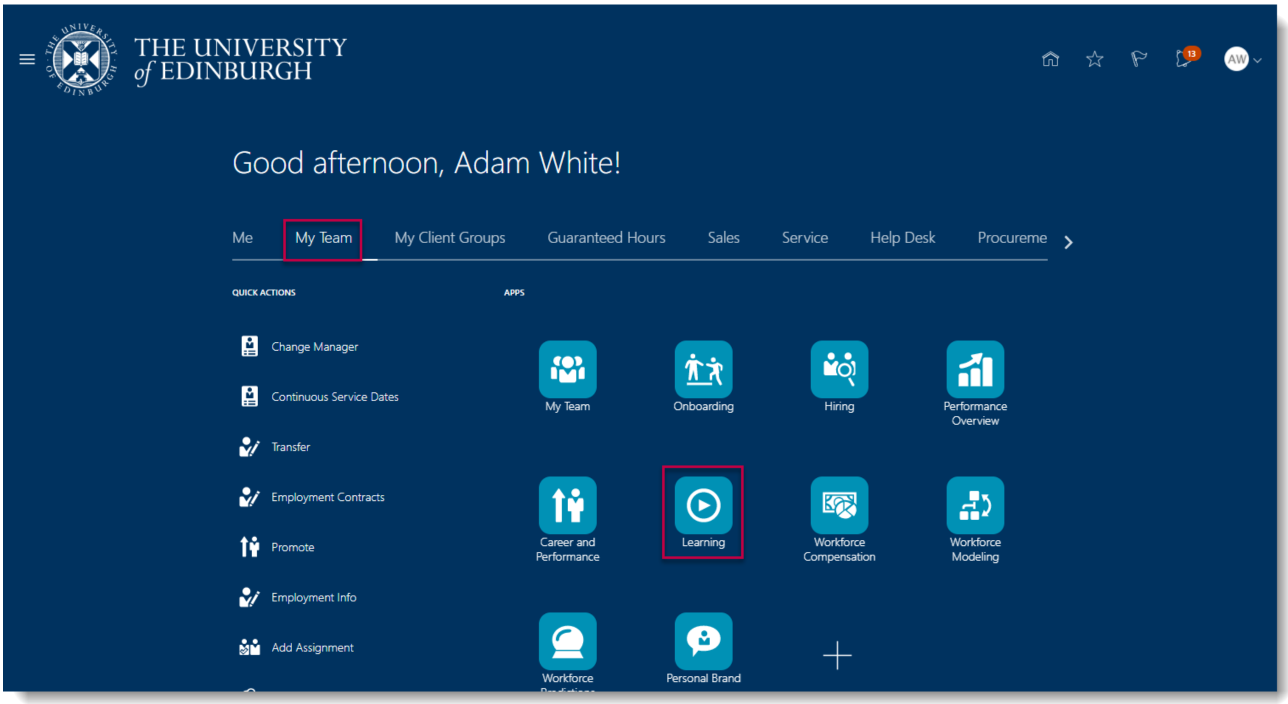
Adding more information provides a good record for historical reference. Use the appropriate fields to meet your needs and ignore those that are not relevant.

5. When you have completed all the fields press **Submit.**

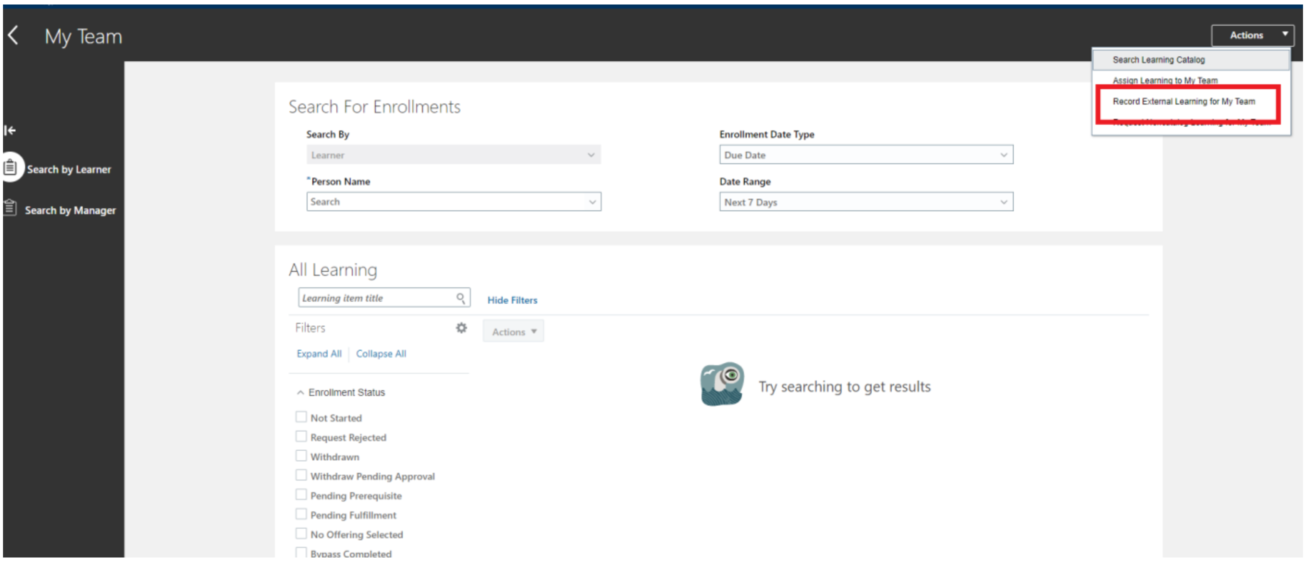
Information that you add will be visible in your Transcript and reportable in Learning Data.

Line Manager - How to record External Learning Experience for my Team

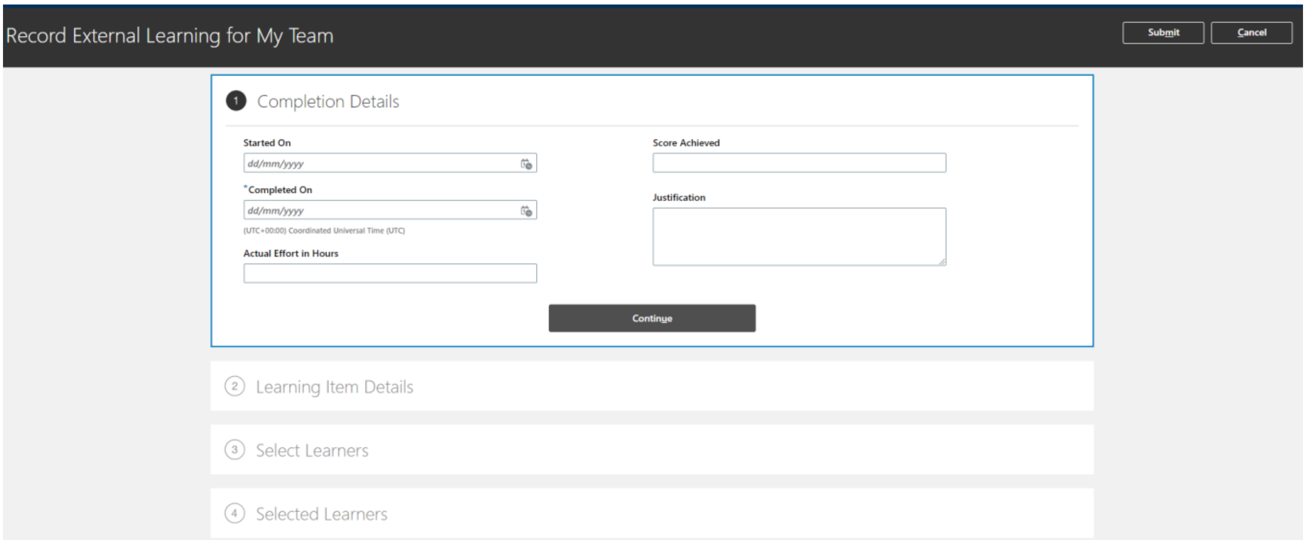
1. From the Home page select **My Team**, then click **Learning**.



2. From the **Actions** button select the option **Record External Learning for My Team**



3. Complete the fields within the **Record External Learning for My Team** Section.

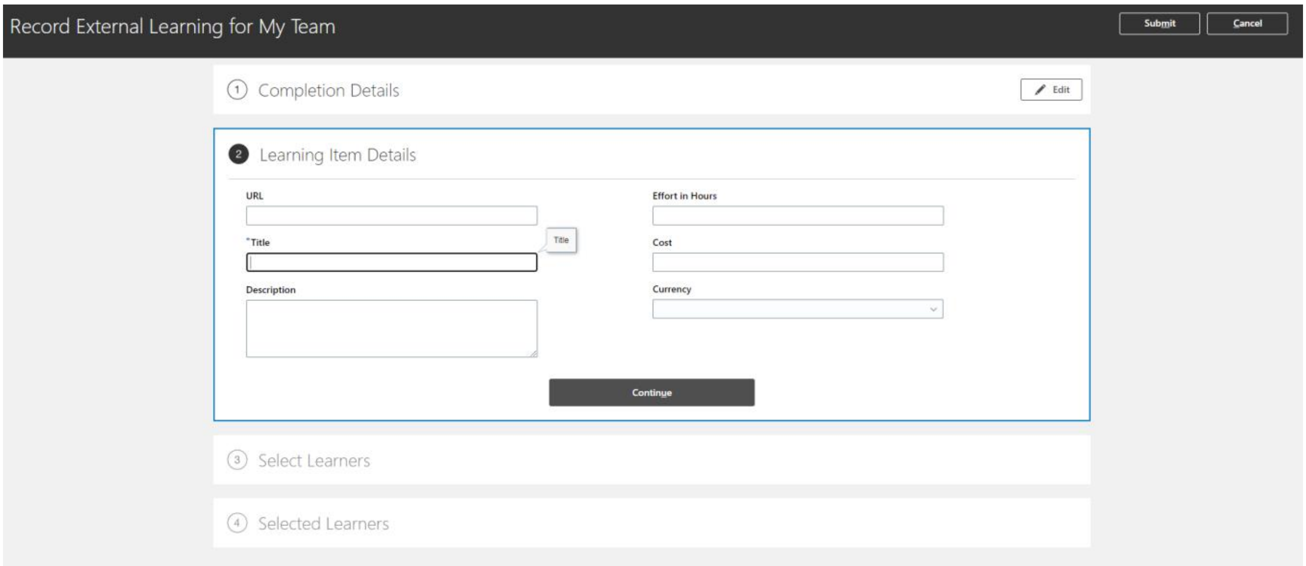


Record options after the learning is complete. The **Completed On** field is mandatory and you cannot add dates into the future.

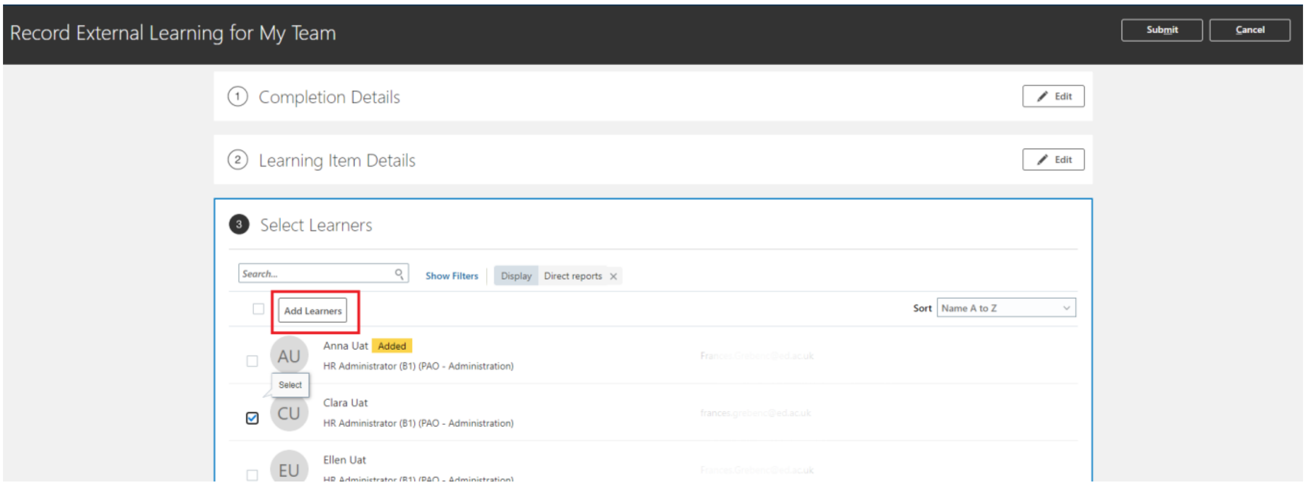
Adding more information provides a good record for historical reference. Use the appropriate fields to meet your needs and ignore those that are not relevant.

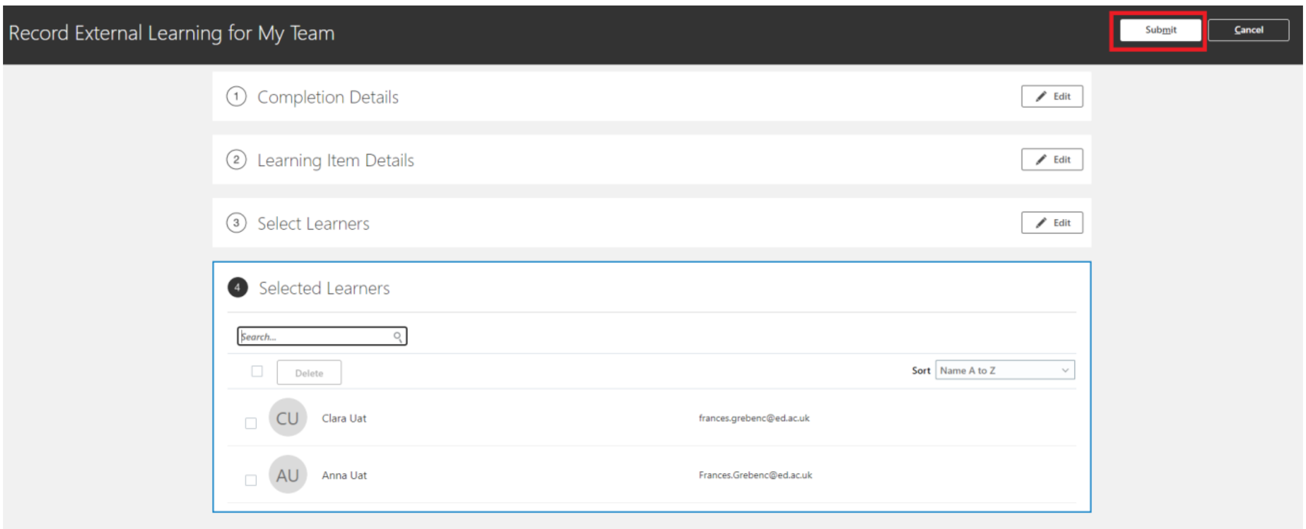
6. Press **Continue** to move between sections

Title is a mandatory field



The process to add your direct reports requires you to select the learner by ticking the box and then pressing Add Learners. Those that have been successfully added have a yellow Added notation beside their name.





You then review and confirm your selection – deleting any mistakes.

4. When you have completed all the fields press **Submit.**

Information that you add will be visible in the direct report's Transcript(s) and reportable in Learning Data found in the Line Manager dashboard.

Glossary

Please refer to Glossary