



## People and Money system

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### How to Review, Approve and Update Skills and Qualifications

#### Line Managers

Skills and Qualifications is a space for university employees to record information on their education, work history, career preferences, licences, certifications and registrations. It will also provide a space for employees and line managers to keep track of licences, certifications and registrations that are essential requirements for certain roles.

Employees are encouraged to use this tool to support career progression discussions with their line managers. It also helps managers and staff to identify experience and maintain essential Skills and Qualifications records.

Managers have access to view the information for their direct reports and their next level reports (Indirect reports).

In the Manager Dashboard, a report is available which list Licences, Certifications and Registrations for use by Managers and Human Resources.

Only changes made to the Licences, Certifications and Registrations - Essential for current role require an approval by line managers. This should only be used for options that need to be tracked.

Line Manager can make these updates on their direct or indirect report's Skills and Qualifications with no approval process. Employee will get a notification of the change.

Line Manager can delete recorded options – employees will get a notification of the change. As the Skills and Qualification app is there for the employee we ask that Managers discuss any changes with their staff – always encouraging staff to make the changes in the first place.

The outcome of some learning items is that the completed participants get an updated option added to their Skills and Qualification. Employee will get a notification of the change.

In addition, for some learning items a specific option within Skills and Qualification is checked as a prerequisite to attending the learning.

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

### **How to view and update your direct/indirect reports Skills and Qualifications?**

1. Navigate to **My Team**, then click the **My Team app**.
2. **Select the name** of the direct report/employee you wish to view from the list of your direct reports or use **Search Person** to locate an indirect report
3. When on the Employment Info Page Click on **Show more**
4. Select **Skills and Qualifications** tab on the left hand side
5. **View** the direct/indirect reports current record
6. Click **Actions** to **Print** the record
7. Click **Edit** or **Add** in the section where updates are required.
8. Click **Edit** at the **Attachment** section to upload documents.

Note: Notifications are sent to the employee for any edit, addition or deletion.

For detailed guidance, see the [next section](#).

### **How to approve any edits or addition to - Licences, Certifications and Registrations - Essential for current role**

1. **Notification** is sent to your email or bell
2. Approve or Reject via email – Click the **Approve / Reject** option in email
3. Approve or Reject via in system bell Notification -Open the record to review the content – by clicking on the name in blue/link
4. Click **Approve / Reject**

For detailed guidance, see the [next section](#).

### **How to access reports on both sections relating to Licences, Certifications and Registrations**

1. Open Manager Report Dashboard – see the user guide - How to view Line Manager Dashboard – for more information

NOTE: The Line Manager dashboard has a report called “Licences and Certificates” which provides a summary of the recorded Licences, Certifications and Registrations.

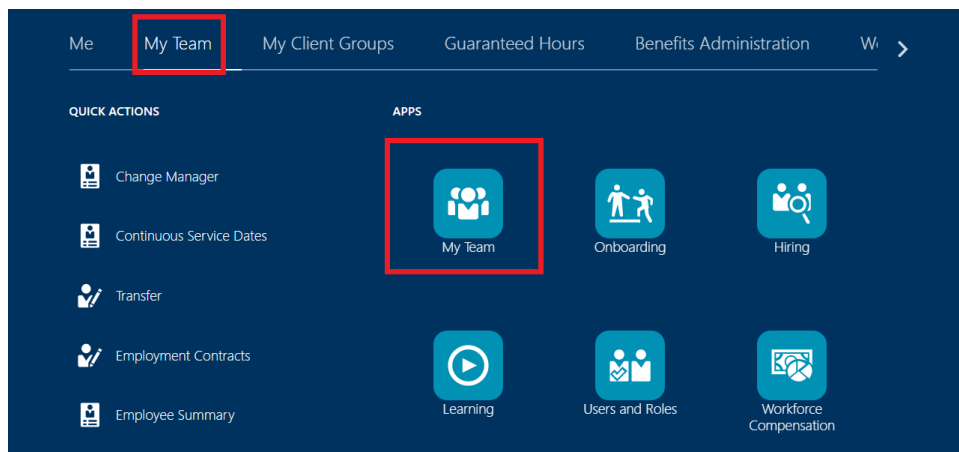
Records include options which are “Essential” and not. This report aims to support ongoing monitoring of the expiry dates and renewals. This report can also be used to identify holders of specific options, required for specific tasks.

For detailed guidance, see the [next section](#).

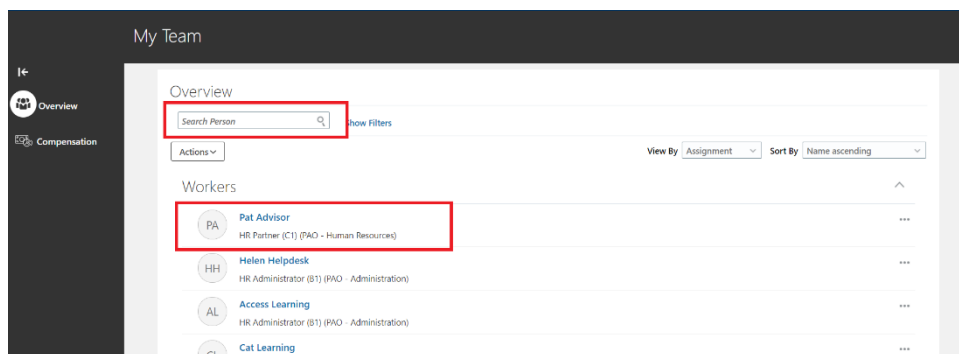
## In Detail...

### How to view and update your direct/indirect reports Skills and Qualifications?

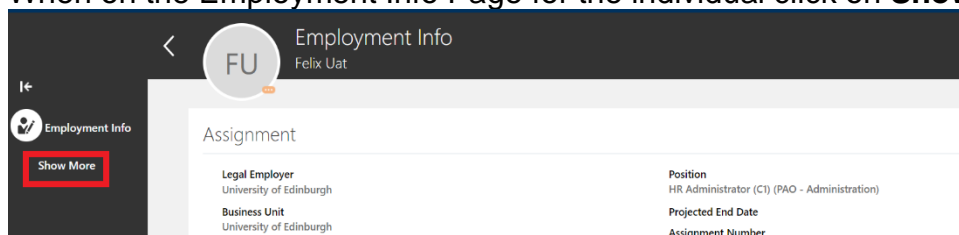
1. Navigate to **My Team**, then click the **My Team** app.



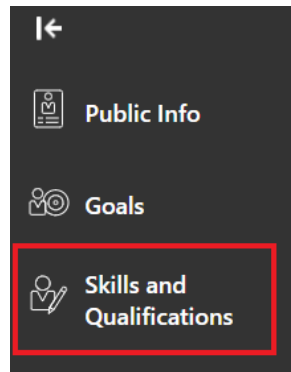
2. Select the employee you wish to view from the list of your direct reports or use Search Person to locate your indirect reports name – adding their name to the field and clicking the magnifying glass. NOTE: First line Managers have access to their direct reports only. Senior Manager have access to 2 levels below them in the structure.



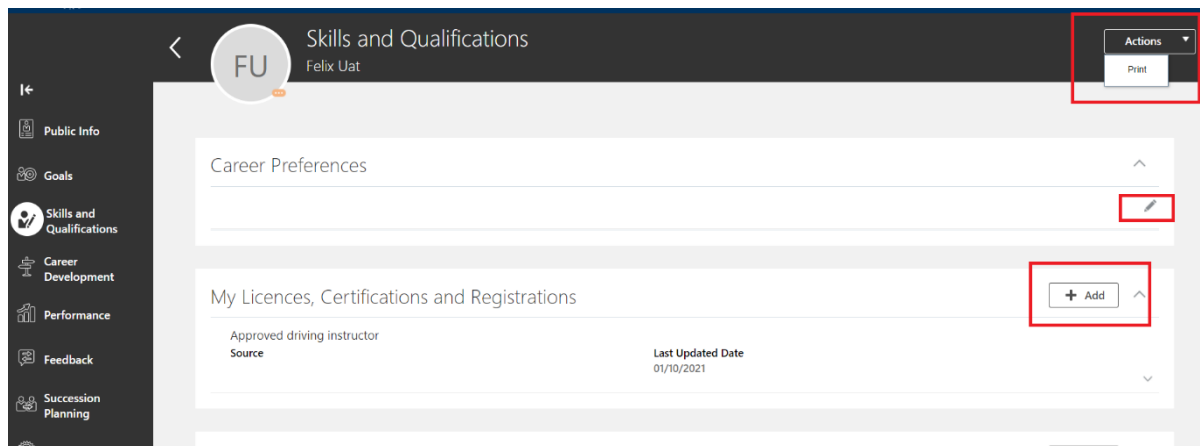
3. When on the Employment Info Page for the individual click on **Show more**



- The option **Skills and Qualifications** will be displayed, select this



- View** the direct/indirect reports current record
- Click **Actions** to **Print** the record
- Click **Edit** (the pencil icon) to amend existing details or click **Add** in the sections where you want to add new information or delete out of date information.



The section will expand and you can add the specific details to your direct/indirect report's profile. In this example we have added another qualification. Click **Save** to complete the update.

Skills and Qualifications  
Angela Redmond

Licences, Certifications and Registrations - Essential for current role

Any Licences, Certifications and Registrations added requires line manager approval. These will not be visible for internal recruitment. If the option that you want to add is not listed go to the Helpdesk and raise a Service Request.

Save Cancel

\*License or Certificate  
REHIS Intermediate Food Hygiene Certificate

Renewal Date  
dd/mm/yyyy

Country  
United Kingdom

Renewal In Progress  
Select

State  
Scotland

Renewal Required  
Yes

Issue Date  
25/02/2021

Status  
Active

Expiration Date  
25/03/2021

Verified  
Select

Issued By

Training Completed Units

Certificate Number

If you do not see a delete option, you can remove the previously added responses/content and click save.

8. If you need to add an attachment, click **Edit** in the **Attachment** section to upload the required documents and **Save** to complete.

Skills and Qualifications  
Angela Redmond

Work History

University of Edinburgh Skills and Behaviours

Special Projects

Additional Information

Attachments

Save Cancel

Drag files here or click to add attachment

Notifications are sent to the employee for any edit, addition or deletion.

To see this process in brief [click here](#).

## How to approve any edits or addition to - Licences, Certifications and Registrations - Essential for current role?

1. Notification is sent to your **email** or **bell**.

This approval process only occurs when an employee who is your direct reports adds an option to the section - Licences, Certifications and Registrations - Essential for current role

All other changes or additions can only be seen by following the steps above.

2. Approve or Reject via email – Click the **Approve** option in email.

Details of what has been added to the record is outlined below in the large text box. If options are left blank by the employee they will not be displayed.

You can also look at the record in People and Money by clicking the blue link called Workplace Application.

If you have seen the correct evidence to confirm that the employee has the Licence, Certification or Registration and it is Essential for their role then click **Approve**.

Access this task in the [Workplace Application](#)

The screenshot shows a notification interface for Anna Uat. At the top, there are three buttons: 'Approve' (green), 'Reject' (red), and 'Request Info' (white). Below this is a header for 'Anna Uat License and Certification Changed'. The main content area, outlined in red, contains the following details:

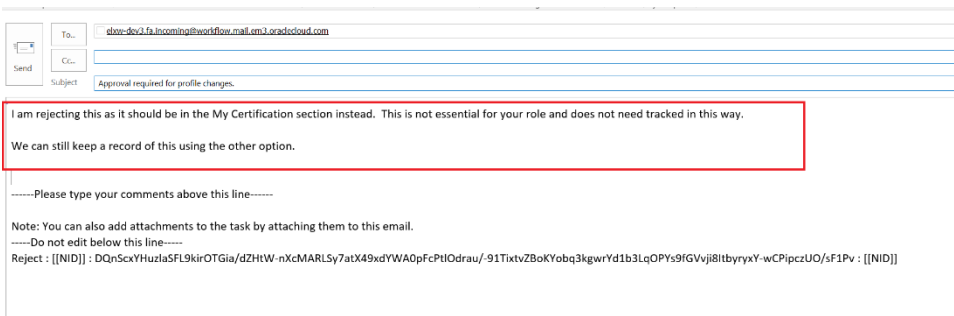
- Added-Certificate of Good Manufacturing Practice
- A license and certification was added to Anna Uat's talent profile. Approval Required.
- License and certification: Certificate of Good Manufacturing Practice
- Updated Date: 11/11/2021
- Name: Certificate of Good Manufacturing Practice
- Renewal Required
- Renewal in Progress
- Expiration Date
- Issue Date
- Number

Below the details is an 'Approvers' section with a table:

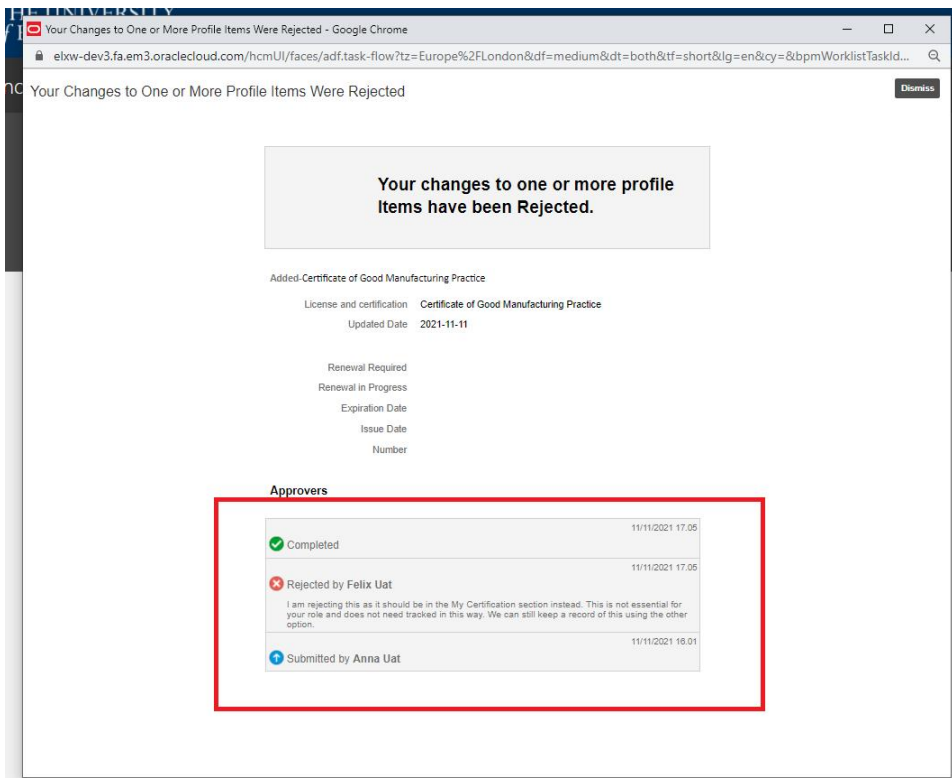
Action	Date
Assigned to Felix Uat	11/11/2021 16:01
Submitted by Anna Uat	11/11/2021 16:01

At the bottom of the notification, there are three buttons: 'Approve' (green), 'Reject' (red), and 'Request Info' (white).

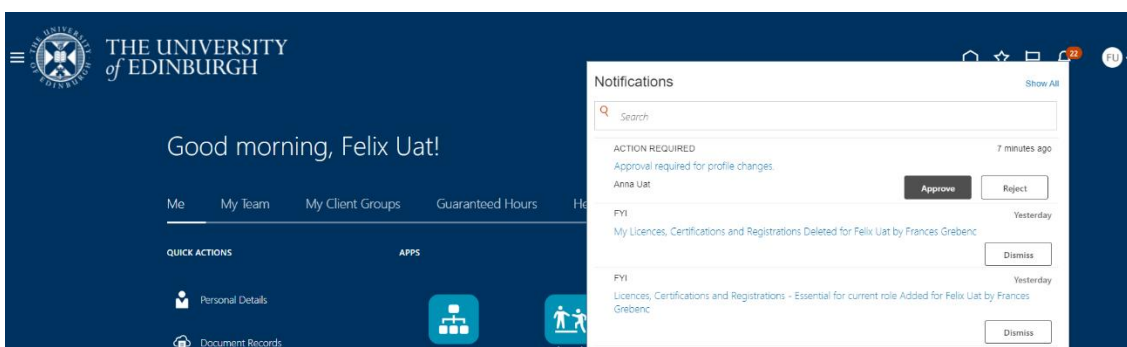
If this Licence, Certification or Registration is not essential for their current role or you want more evidence – click **Reject** - Adding your own reason.



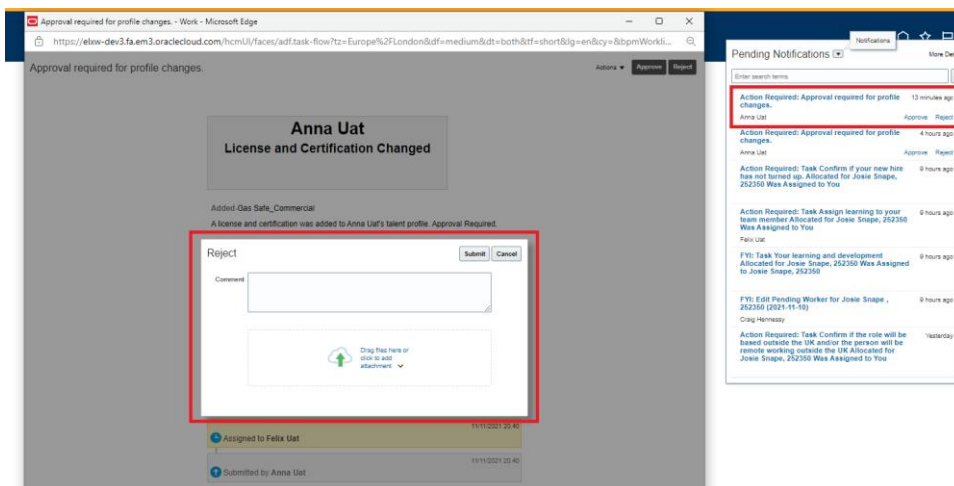
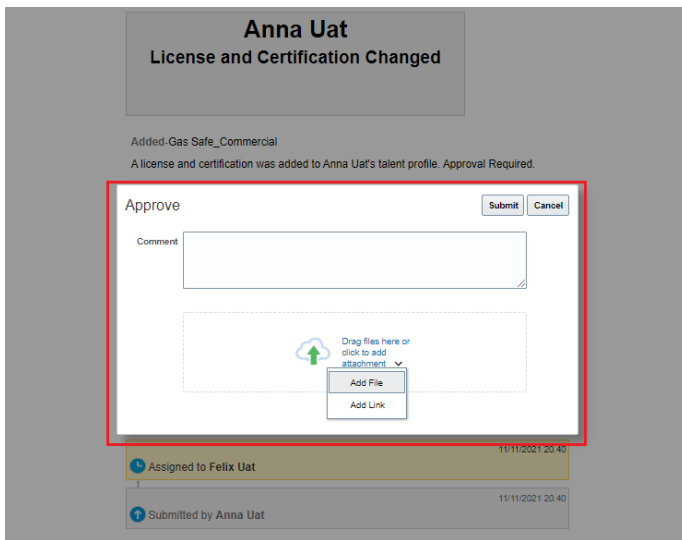
The reason added will be included in the notification that goes back to your direct report



3. Approve/Reject via in system bell Notification -Open the record to review the content – by clicking on the **name in blue/link**



4. Click **Approve or Reject** - the information is displayed on the pop up when you click Approve or Reject you have the option to add the reasoning or an attachment only if required



In the same way as email outlined above – a reason is added to the Reject option.

NOTE: Follow the current agreed practice when viewing and recording evidence. If there is no need to keep a record of the evidence, then don't add the attachment. If you use a different storage system for copies of documents – continue as is.

The attachment option is available for use, if appropriate for the situation. Teams may move over to this process if it meets their needs.

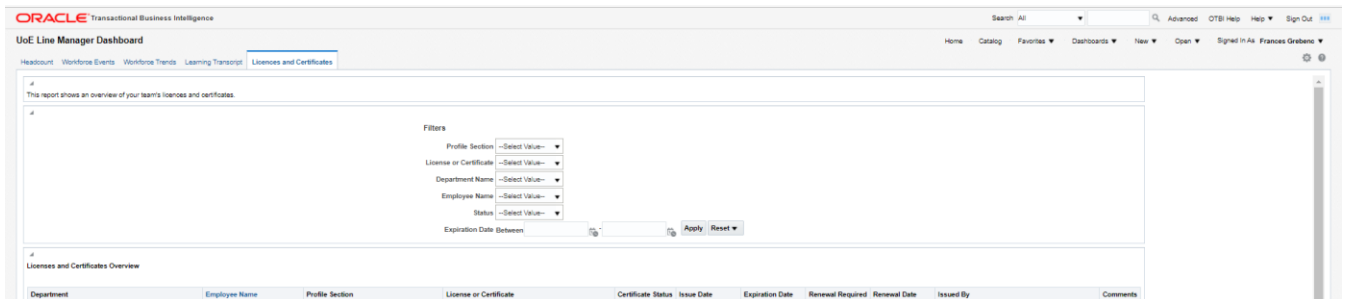
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## Glossary

Please refer to [Glossary](#)