THE UNIVERSITY of EDINBURGH

People and Money system

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How to Track, Withdraw, Edit or Cancel Direct Reports Enrollments

Line Manager

Similar to the guidance that direct reports should discuss their learning aims with their line manager ahead of enrolling in options. Line Managers should discuss the Learning enrolment with their direct reports before editing or cancelling any enrollments.

People and Money – Learning – offers more access to Learning related information but it does not replace the requirement for ongoing and meaningful conversations.

Line Managers have access to Withdraw, Edit of Cancel Direct Report Enrolements as long as certain conditions are in place:

- The learning was not a required assignment
- The learning was a recorded External Learning Experience/Noncatalog Item (Line managers can Edit or Cancel these)
- The Learning is **Not Started** or **In Progress** (Line Managers cannot withdraw from a completed course,offering)

Users will notice the available options change depending on the status of the learning item and the type of item it is.

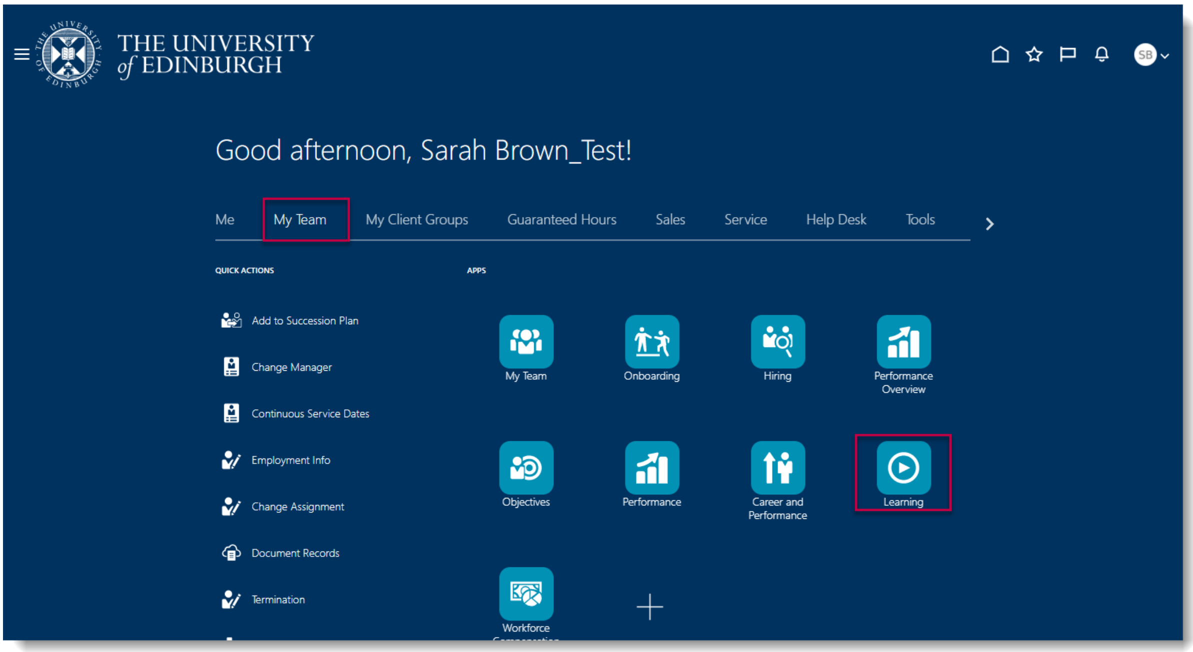
In Brief…

1. From the Home page navigate to **My Team** and select the **Learning app**.
2. Search for the name of the learner. Amend date range if necessary.
3. Select the Course and click the **Actions** button.
4. Choose the relevant action from the drop down list.

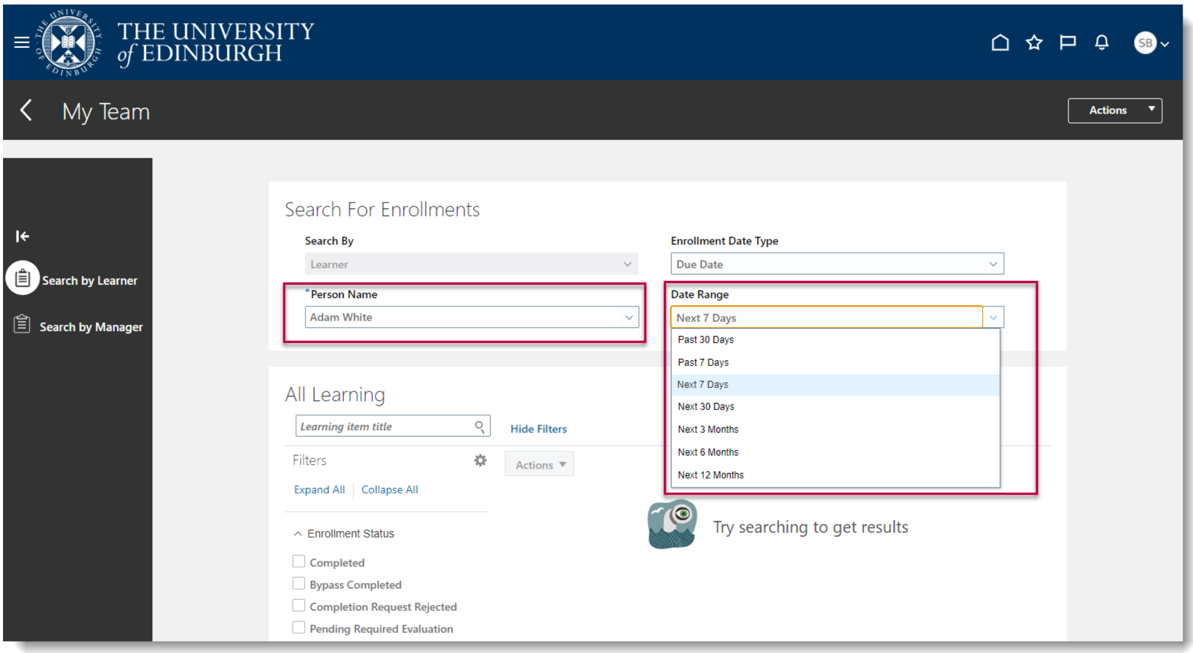
For detailed guidance, see the next section.

In Detail…

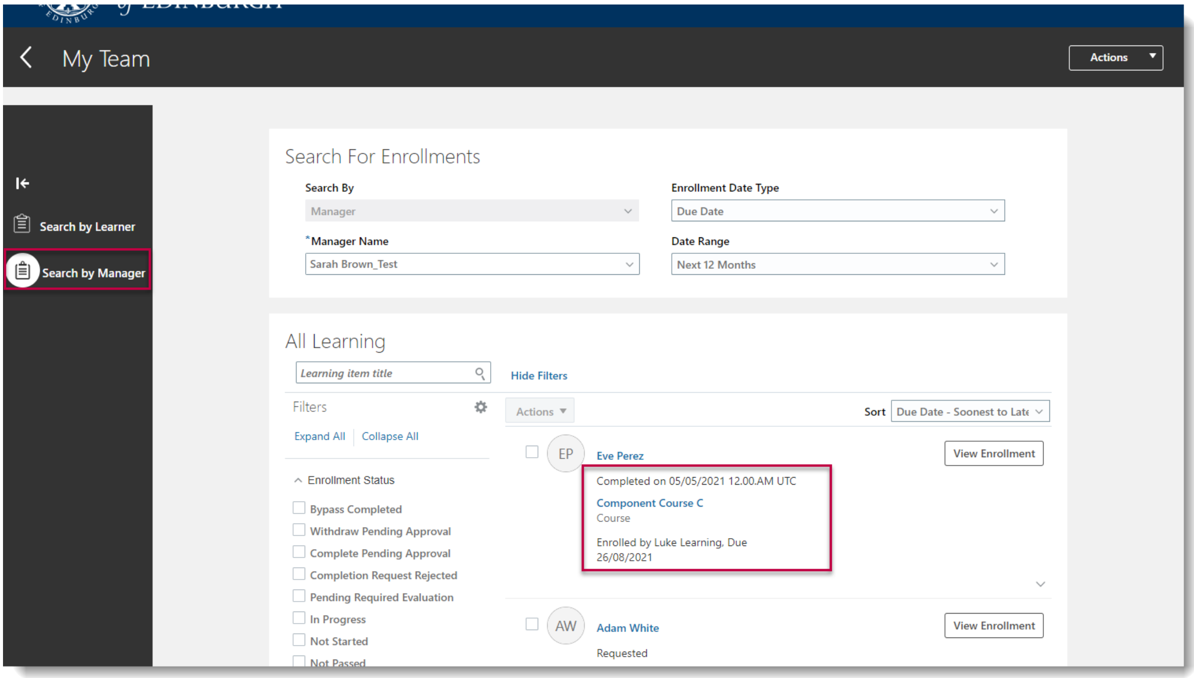
1. From the Home page navigate to **My Team** and select the **Learning app**.



2. Search for the name of the learner, remembering to amend the date range you are searching in if needed.



2.1 As a Line Manager you can also choose the option to **Search by Manager** by choosing the option from the menu on the left. This will show you all enrolements for your team or your direct report's team.
Both options allow you to see the status of the enrolment, the due date and who enrolled the learner.



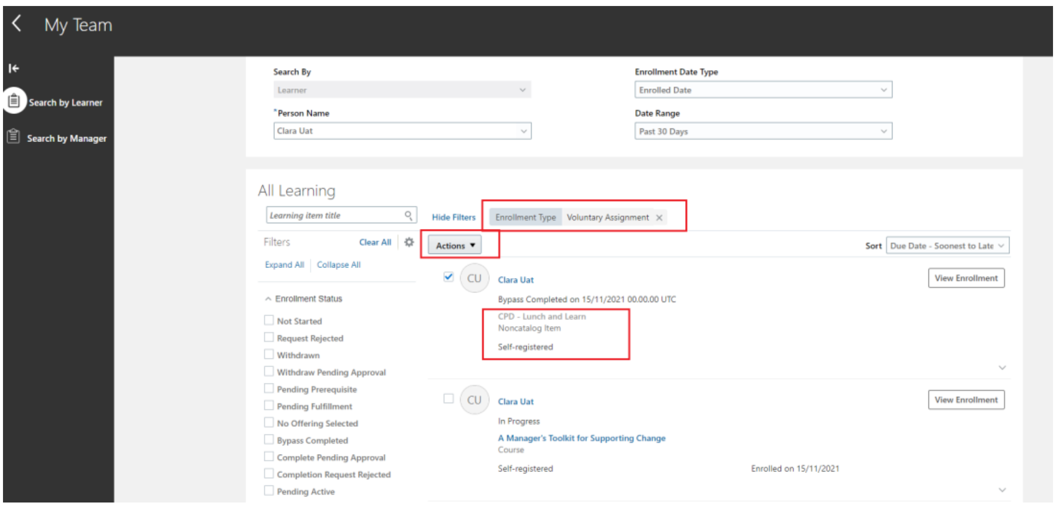
3. From the results choose the enrolment you want to amend by clicking the check box and the side.

In the example below we have added a filter to view only voluntary assignments. As a result Self-registered and Voluntary Assignments are displayed.

Note: Actions available differ depending on the course that is selected. E.g Line Managers are unable to cancel **Required** learning assigned by a Learning Administrator.

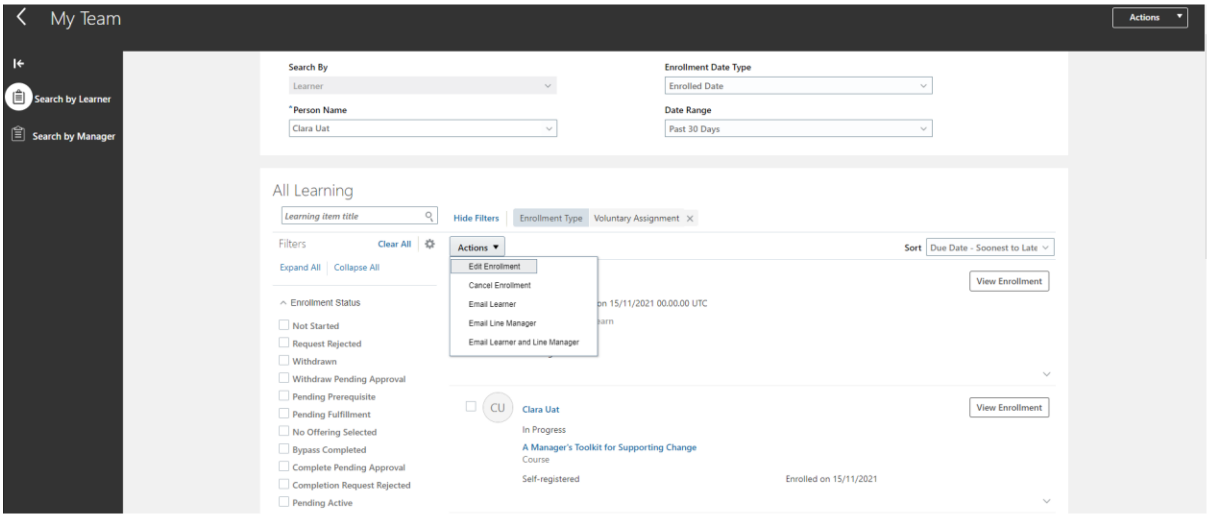
The first item to review is the recording that was made of a Lunch and Learn CPD session – External Learning (Noncatalog Item)

4. Once you have selected the course click the **Actions** button and choose the action you want to take.

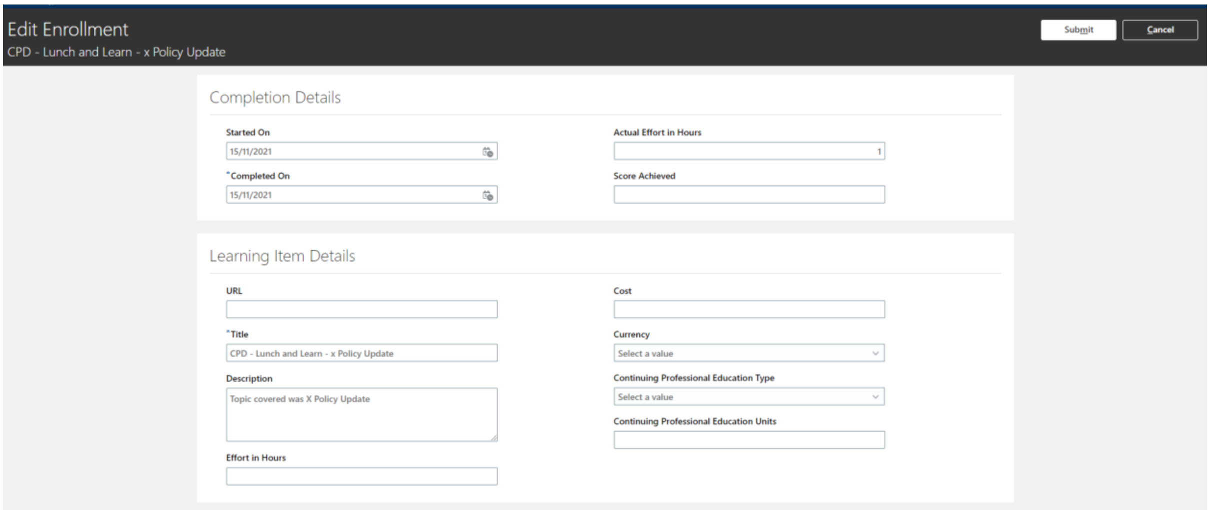


The options displayed are:

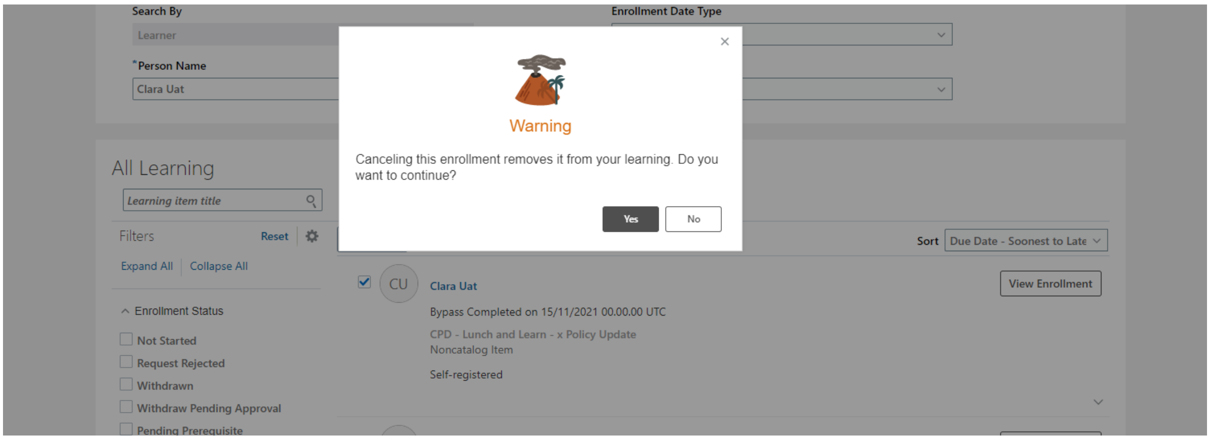
- Edit Enrolment
- Cancel Enrolment
- Email Learner – to send email using outlook
- Email Line Manager – n/a unless you are cancelling a indirect report's enrolment
- Email Learner and Line Manager - to send email using Outlook



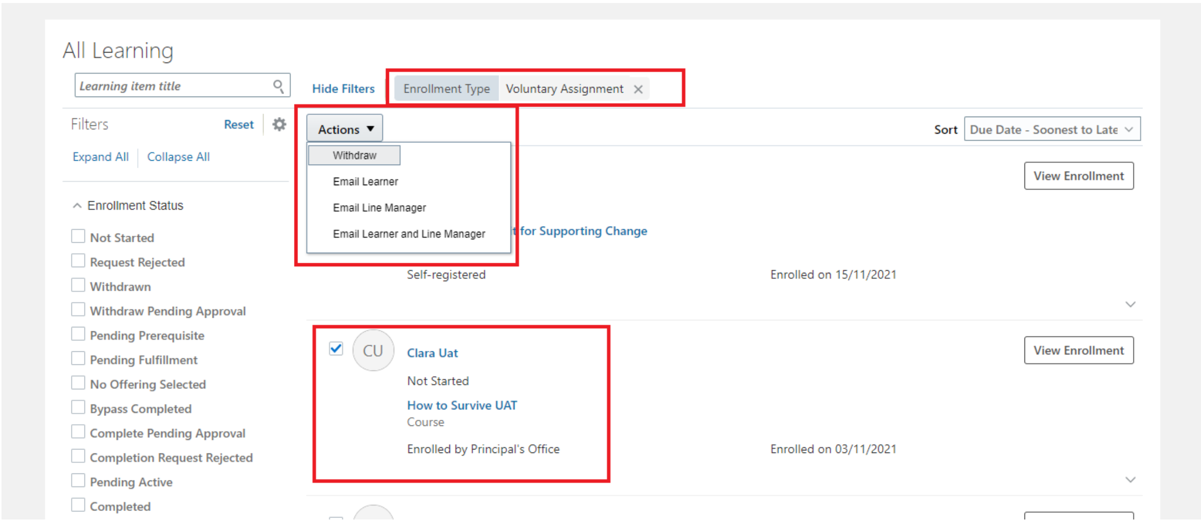
If the Line Manager clicks on **Edit** – you can add more information to the record. Click **Submit** to save.



If the Line Manager clicks on **Cancel** and **Yes** – the record is removed.



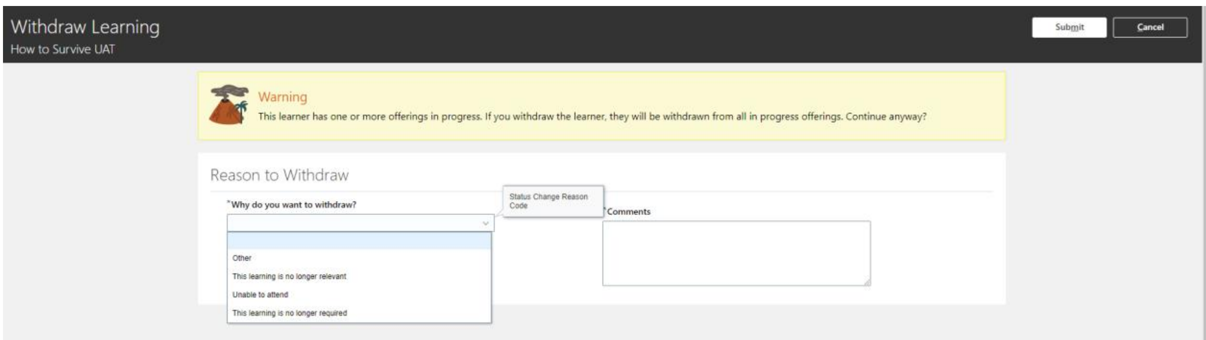
Using the example of a course that is **In Progress** or **Not Started** the options change when you click on **Actions**.



The options displayed are:

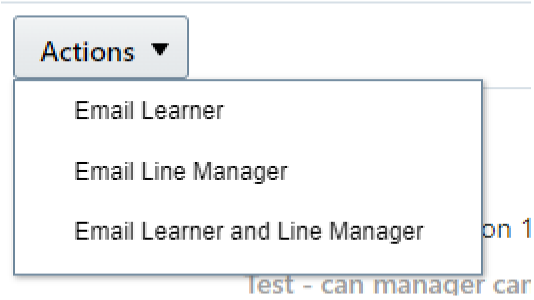
- Withdraw
- Email Learner – to send email using outlook
- Email Line Manager – n/a unless you are cancelling a indirect report's enrolment
- Email Learner and Line Manager - to send email using outlook

If you click on **Withdraw** – The warning will change depending on the situation:



Record the reason and add **Comments** then Click on **Submit**.

If a course cannot be Withdrawn, Edited or Cancelled – then the Action list will only display:



5. The learner will also receive a notification advising them of the action that has been taken.

Glossary

Please refer to Glossary