



People and Money system

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Line Manager Guide- How to Change Direct Reports

Line manager/School or Department Admin

Estimated time to complete: 12 minutes

Assumed Knowledge:

1. The Manage Direct Reports functionality enables you to reassign all the direct reports of a manager to new managers in a single process.
2. **Managers can initiate the Change Direct Report Process for their direct reports only whereas School/Department Admins can initiate this for anyone in their Area of Responsibility (ie. their School/Department)**
3. Both Managers and School/Department Admins can add any employee across the University as direct reports –
 - a. Managers can only add them to their own team
 - b. School/Department Admins can add them to a manager's team within their Area of Responsibility
4. Both Managers and School/Department Admins can reassign or push direct reports to any other manager in the University via the Change Direct Reports function –
 - a. Managers can only do this to employees in their own team
 - b. School/Department Admins can do this for employees within their Area of Responsibility

In Brief...

This is a simple overview of the process.

1. From the Dashboard, select the **My Team** section and then select **Show More** under **Quick Actions**
Note: If you're a School/Department Administrator, please select **My Client Groups** first.
2. In the Employment section, select **Direct Reports**
3. In the search box that appears **search** for the team member whose direct reports you would like to change or **select** them from the list of Direct Reports that will be displayed below
4. In the **When and Why** box, select the:
 - a. **Date** on which the change starts based on the hint provided
 - b. Relevant **Reason** for making these changes from the **Why are you making these changes?** dropdown menu

Then press **Continue**

Continue

5. The **Reassigning of Reports** box should be available if the employee you have selected has any direct reports. **Check the boxes** against all or any of the direct reports you would like to reassign to a new (proposed) manager as a result of these changes. Then, **Search** for the proposed manager and press **Continue**

Continue

6. In the **Add Direct Reports** box, **search** for people to add as new reports to the employee and then press **Continue**

Continue

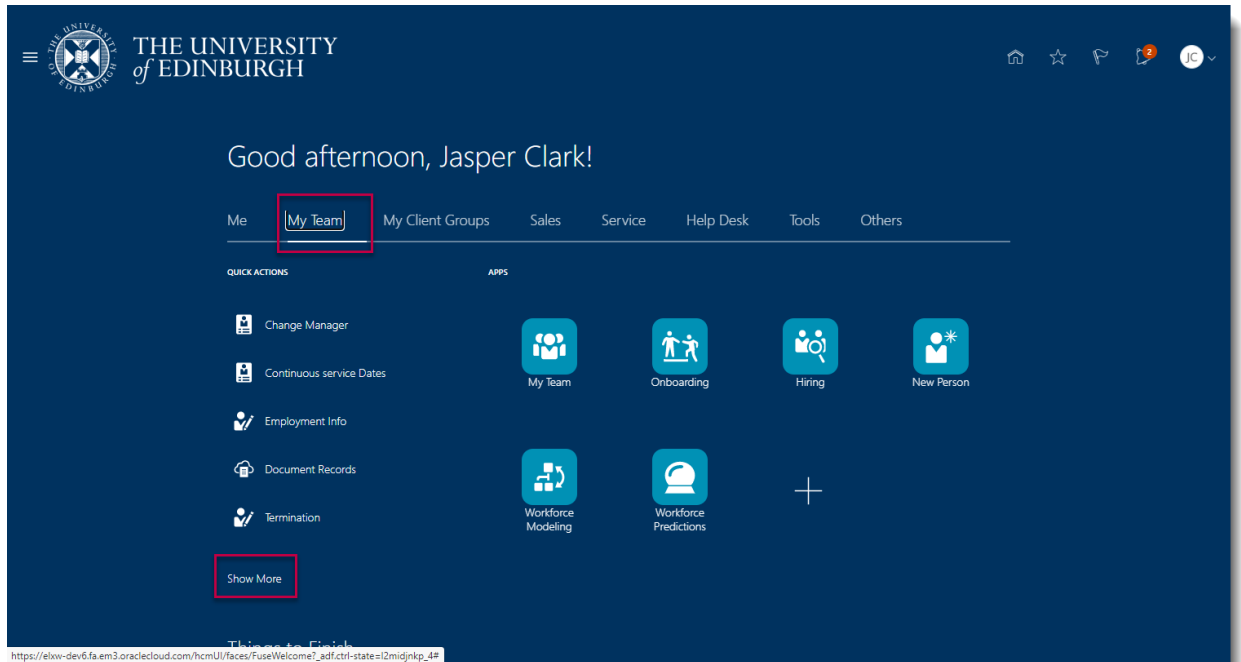
7. In the **Comments and Attachments** section, fill in any relevant comments and upload attachments where required
8. Hit **Submit**

Submit

For detailed guidance, see the next section.

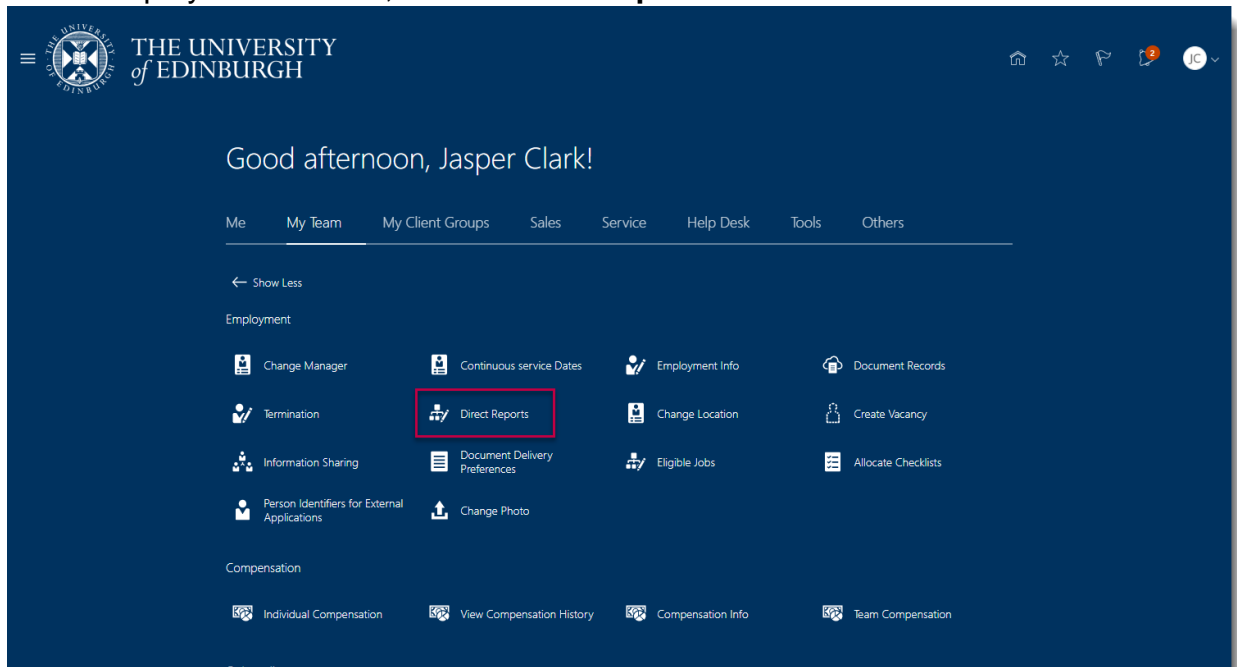
In Detail...

1. From the Dashboard, select the **My Team** section and then select **Show More** under **Quick Actions**

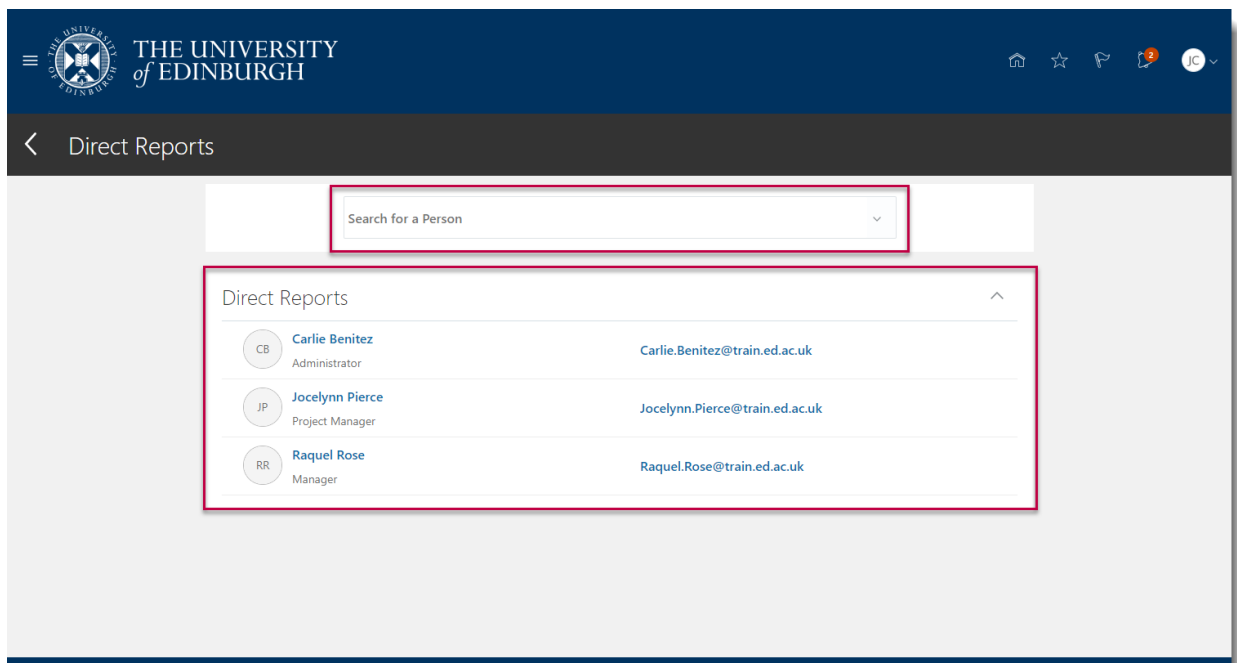


Note: If you're a School/Department Administrator, please select **My Client Groups** first.

2. In the Employment section, select **Direct Reports**

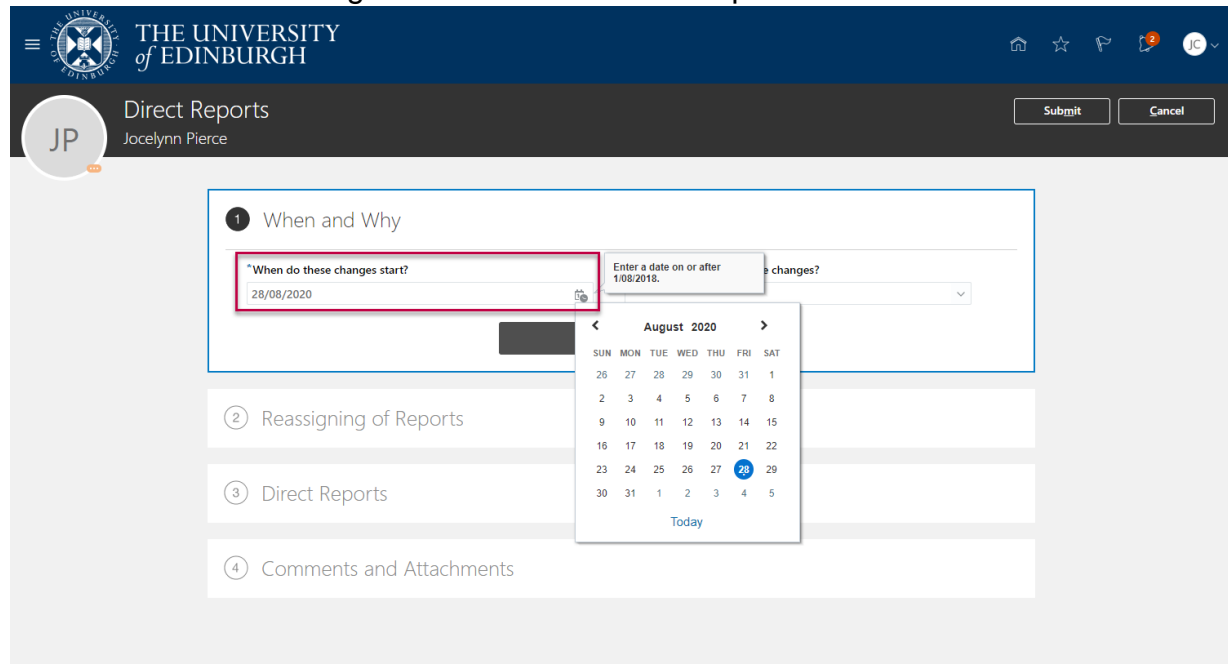


3. In the search box that appears **search** for the team member whose direct reports you would like to change or **select** them from the list of Direct Reports that will be displayed below

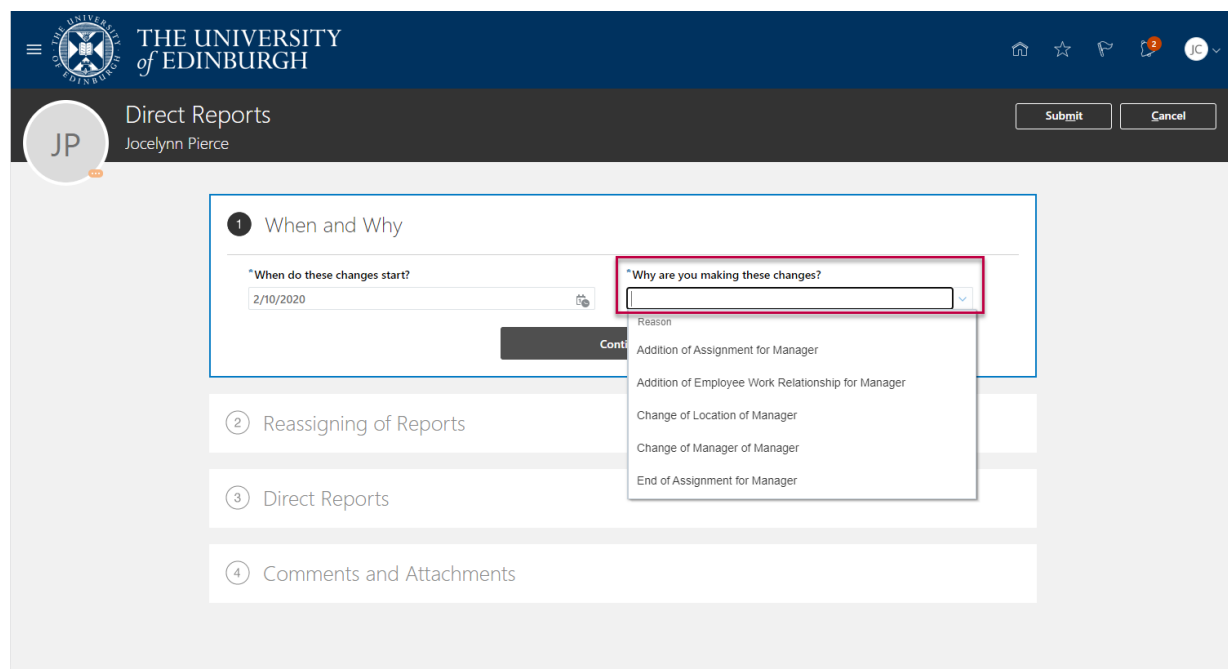


4. In the **When and Why** box, select the:

a. **Date** on which the change starts based on the hint provided



b. Relevant **Reason** for making these changes from the **Why are you making these changes?** dropdown menu



Note: For all the available Reasons and when to use them, check the [appendix](#).

5. Then press **Continue**

THE UNIVERSITY of EDINBURGH

Direct Reports
Jocelynn Pierce

Submit Cancel

1 When and Why

*When do these changes start?
2/10/2020

*Why are you making these changes?
Addition of Assignment for Manager

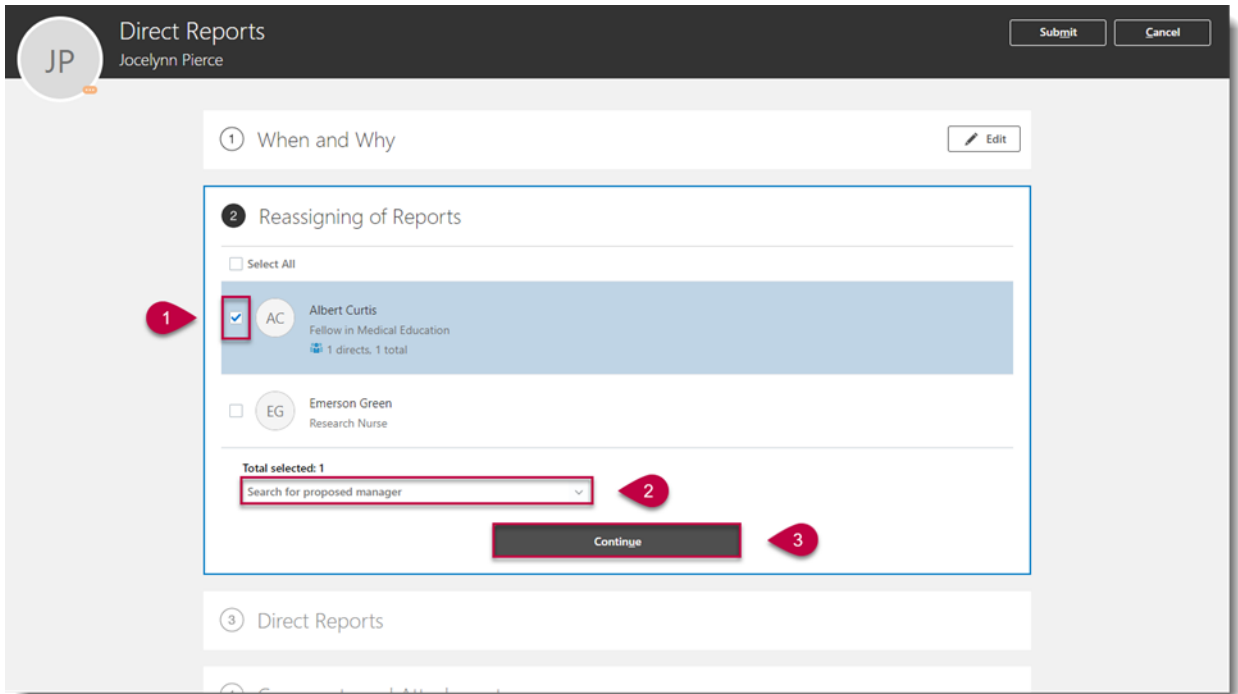
Continue

2 Reassigning of Reports

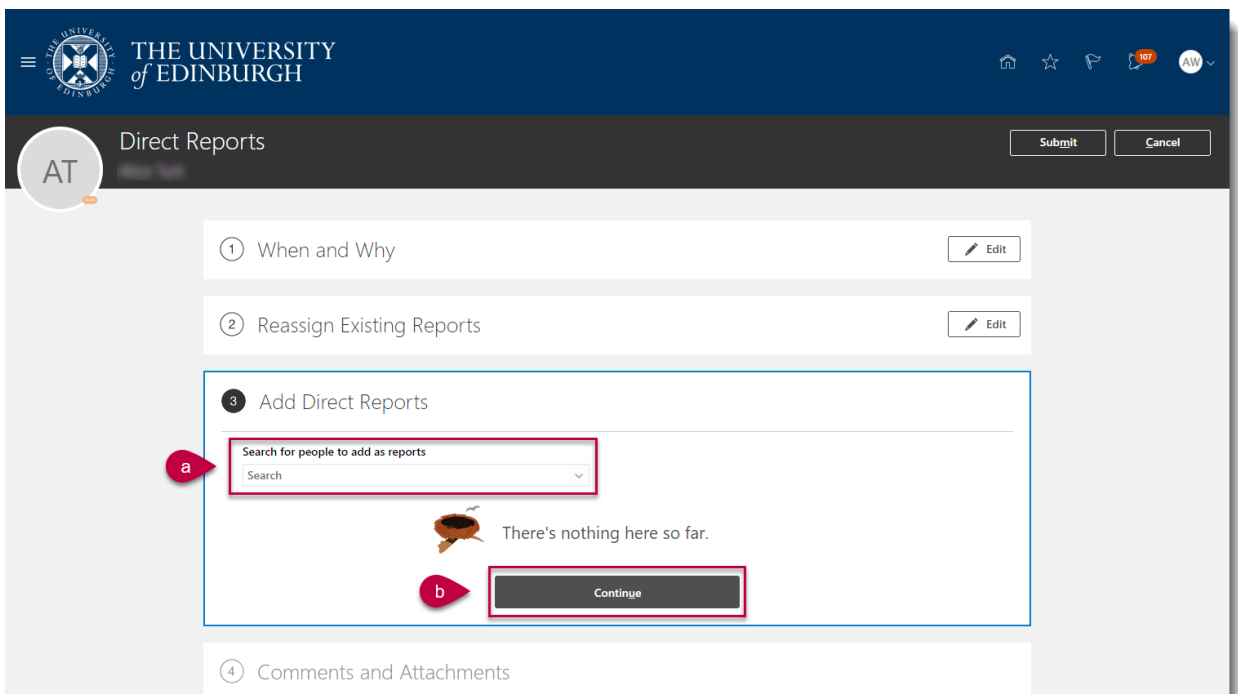
3 Direct Reports

4 Comments and Attachments

6. The **Reassigning of Reports** box should be available if the employee you have selected has any direct reports. **Check the boxes** against all or any of the direct reports you would like to reassign to a new manager as a result of these changes. Then, **Search** for the proposed manager and press **Continue**.



7. In the **Add Direct Reports** box, **search** for people to add as reports and then press **Continue**



8. In the **Comments and Attachments** section, fill in any relevant comments and upload attachments where required

The screenshot shows a web interface for 'Direct Reports' by Jocelynn Pierce. The top navigation bar includes a user profile icon (JP) and buttons for 'Submit' and 'Cancel'. Below the navigation bar, there are four numbered sections: 1. When and Why, 2. Reassigning of Reports, 3. Direct Reports, and 4. Comments and Attachments. The fourth section is highlighted with a red border. It contains a 'Comments' text area and an 'Attachments' section with a dashed box and a green upload icon. A tooltip labeled 'Comments' is visible next to the text area.

9. Hit **Submit**.

This screenshot shows the same 'Direct Reports' form as above, but with the 'Submit' button in the top right corner highlighted by a red box. The 'Comments and Attachments' section is no longer highlighted. The interface includes the University of Edinburgh logo and navigation icons in the top right corner.

Glossary

Please refer to Glossary

Appendix

Action Reason (Why are you changing the Direct Report(s)?)	When to use this reason
End of Temporary Assignment for Manager	The Line Manager's temporary assignment has ended
New Hire of Manager	
Addition of Employee Work Relationship for Manager	
Change of Location of Manager	The Line Manager will be working from a different location
Change of Manager of Manager	
Promotion of Manager	The Line Manager has been promoted
Resignation of Manager	The Line Manager has resigned
Temporary Assignment of Manager	
Transfer of Manager	The Line Manager has been transferred to a new post
Addition of Assignment for Manager	
End of Assignment for Manager	The Line Manager's Assignment has ended