

THE UNIVERSITY of EDINBURGH

People and Money: Learning

Manager: How to manage team learning

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Introduction

This guide covers key tasks for managers in People and Money: Learning - a one-stop-shop for staff learning at the University.

There are hundreds of learning opportunities (courses) available to you, and your team members.

Some are expected of you in your role and may be assigned to you, and others are available for you to enrol on, or for your manager to enrol you on, and for you to enrol team members on.

Courses may be instructor-led in a classroom, be delivered virtually using e.g. Teams, or be self-paced eLearning that you complete independently.

Remember that People and Money offers access to learning opportunities, but it does not replace the requirement for ongoing and meaningful conversations. Learning aims should be discussed with your team member(s) and agreed in advance of enrolment. This may occur as part of their annual review or during your ongoing one to one conversations. Further information to support you is available in the <u>Conversations Hub</u>.

Before you start, please familiarise yourself with the <u>Guide to Learning, Skills and Qualifications for Line</u> <u>Managers</u>

Line managers manage team learning by working with their direct reports to:

- Make the most of your new hires' on-boarding experience by recommending appropriate learning
- Support your team in improving their performance
- Have more meaningful annual reviews and one-to-one conversations
- Keep track of your teams' learning progress and identify learning requirements

My Team> Learning enables managers to:

- Search the catalogue to review learning options for their direct reports
- View learning enrolment records of your direct reports and their direct reports and export their search results
- Download the data relating to learning enrolments for their direct reports and all employees in their reporting line.
- Assign learning to your team, and other teams in your organisation hierarchy
- Recommend learning to your team, or outside of your line management structure
- Find more information on Learning

This guide covers these processes.

Line Managers should also review the Guide to Skills and Qualifications.

In Brief

This section is a simple overview and should be used as a reminder. More detailed information on each outcome is provided later in this guide.

View team enrolments

- 1. From the home page navigate to My Team then Learning.
- 2. Select My Team from the lower left of screen.
- 3. Use the filters to refine your search, if desired

View/Edit a team members' current enrolments

- 1. Select the relevant team member to view their learning engagement
- 2. Use the filters to refine your search, if desired
- 3. Select the "arrow" icon to email a reminder to your report about an enrolment
- 4. Select the "eye" icon to the right of each line of information to see more detail
- 5. From the details screen, select Actions for more options on this enrolment

Switch team

- 1. On the Team Learning screen, choose Switch Team from top right of screen
- 2. This will display a list of people managers in your team
- 3. Select the relevant manager to display their team members learning records
- 4. Navigate through your hierarchy of reporting to view other managers team learning records

Use reporting tools in Team Learning

1. On the Team Learning screen, choose Actions> Download options to download data relevant to your direct reports or organisation (all employees in your reporting line)

And/or

2. Use filters to refine a search to your criteria and select the export button to download the data that is on the screen at the time you select export

Search the catalogue of learning

- 1. From the home page navigate to My Team then Learning.
- 2. Select Search from the lower left of screen.
- 3. Enter a key word into the Search bar, and/or use the filters to refine your search.
- 4. From the results select the course title to Learn More or Assign to My Team.

Assign learning to your team

1. Use Search to find the learning item you'd like to assign and select it to expose more information.

- 2. Choose the option **Assign to My Team**.
- 3. Complete the **Assignment Details** section
 - a. Assignment type
 - b. Start date
 - c. Due Date
 - d. Choose Selection Type and Learners, and add a note
- 4. Select Assign.

Recommend learning

- 1. Use Search to find the learning item you'd like to assign and select it to expose more information.
- 2. Choose the option Learn More
- 3. Review Rating if you wish to
- 4. Select the Actions button and choose the option Recommend
- 5. Search for the person you want to recommend it to add a comment if you wish and select **Submit**.

Copy links

- 1. Use Search to find the learning item you'd like to share a link to and select it to expose more information.
- 2. Choose the option Learn More
- 3. Select the Actions button and choose the option **Copy Link**
- 4. The link will be copied to your computer clipboard for onward use

Record external learning

- 1. From the Team Learning screen, choose Actions then Record External Learning
- 2. Complete the following minimum information
 - a. Start date & completion date
 - b. Learning item title and description
- 3. Add Learners, with a note if desired
- 4. Select Record

In Detail

View team enrolments

View by Learners

- 1. From the home page navigate to My Team then Learning.
- 2. Select My Team from the lower left of screen (if it's not already selected).



- 3. Use the filters to refine your search, if desired. You can combine multiple filters and clear them. You can switch order of presentation by using Sort By.
- 4. NOTE: if some of your team members do not yet have enrolments on Learning, they will not appear on this list.

< Team Learning			Actions Switch Team
Search by learners Q			
Reports Direct reports X Enrollments Enrollment Type Due De	Enrolled on Date Complete	ed Date Filters Clear (1)	Д
3 Items		Sort	By
	Required O	Voluntary 3	
	Required O	Voluntary 5	
	Required O	Voluntary 5	

View by Learning Items

1. Select Learning Items to change the view to focus on courses. This example shows an additional filter for Enrolments: Completed

Search by learning items		۹							
Reports Direct reports	Enrollments Completed \mid X	Enrollment Type	Due Date	Enrolled on Date	Completed Date	Filters	Clear (2)		
3 items							Sort By 💌	Learners	Learning Iten
Information Security Esser Expected effort is 0.5h - 1.0h h	ntials iours			Lo 1	arners				
Equality and Diversity Esse Expected effort is 1.0h - 1.5h h	entials iours			La 3	arners				
Data Protection Essentials Expected effort is 0.75h - 1.0h	hours			La 3	arners				

View/Edit a team members' current enrolments

- 1. Select the relevant team member from your My Team screen to view their learning engagement in more detail
- 2. Use the filters to refine your search, if desired.

Tips:

- The actions available for each enrolment are context sensitive
- You can see actions/options on learning items with a pre-completed status. (No Offering Selected, Not Started or In Progress) as there is no need for actions on a Completed enrolment
- In the example below you can see for the top enrolment direct access to the email arrow, and the withdraw icon, and in the 2nd enrolment, the ellipsis is selected to see all available actions for that enrolment.

	89 99			View Transcript Switch Tear
Search by learning items	Q			
Enrollments Enrollment Status 3 X	nrollment Type Due Dat	te Enrolled on Date	Completed Date Filters Clear (3)	
7 items		÷		Sort By 💌
Using Articulate Rise 360 for Rapid-Depl	oyment Training	Enrolled Date 7/05/2024	Enrollment Status Not Started	\$ 5
New Staff Meet-Up Expected effort is 1.2h - 1.2h hours		Enrolled Date 7/02/2024	Enrollment Status No Active Offering	
Equality and Diversity Essentials Expected effort is 1.0h - 1.5h hours		Completed 22/08/2023	Enrollment Status Completed	 Send Email Withdraw
Data Protection Essentials Expected effort is 0.75h - 1.0h hours		Completed 16/05/2023	Enrollment Status Completed	Ξα Select an offering.

- Selecting an individual enrolment allows you to see more detail on the team members' engagement with that course.
- In this example we can see one required activity (the course title) has been completed and one optional activity (the evaluation).
- Use the **Actions** button to show more detail, if required.

< E	Equality and Diver	sity Essentials				
	Actions View More Enrollment Details					
Craig	View Learning Item Details Recommend	ng on 2023-08-22				×
1 of	1 required activities com	pleted				
C	Equality and Diversity Essen eLearning	tials	Completed on 22/08/2023	Required	v	
C	Evaluation Evaluation		Completed on 22/08/2023		~	

Switch team

- 1. On the Team Learning screen, choose Switch Team from top right of screen
- 2. This will display a list of people managers in your team on the right
- 3. Select the relevant manager to display their team members learning records



Tips:

- From the Team Learning screen you can use Switch Team again to explore learning activity in your direct reports' team
- Using Switch Team again, you can explore learning activity in your organisational hierarchy.

Use reporting tools in Team Learning

There are 2 ways to retrieve data from My Team> Learning depending on your requirements.

Actions>Download

Choose Actions> Download options to download enrolment data relevant to your direct reports or organisation (all employees in your reporting line).

Search by learners	م						Assign Learning	
Reports Direct reports X Encolv	ents Enrollment Status	Enrollment Type	Due Date	Job Title	Department	Busine	Record External Learning Download for My Direct Reports	R
3 items						Sor	Download for My Organization IIII	Ł
Construction of the local diversion of the lo			Required		-	thetay		

Tips:

- The download can present up to 10,000 lines of data
- Please ensure that any downloaded reports are stored in accordance with the University's <u>Data</u> <u>Protection | Data Protection</u> and <u>Records Management | Data Protection</u> guidance.

- Some numeric data relating to learning assignment used in the background of People and Money is displayed as "general" format in Excel. If you need to see this data, simply change these columns to number format
- If an employee does not have an enrolment on at least one course, there will be no data to report. Typically, Guaranteed Hours, Casual staff and Contingent Workers are not auto enrolled.

Using filters

Use filters to refine a search to your criteria and select the export button 2 to download the data that is on the screen at the time you select export.

The following example of a search shows a combination of 2 filters (Reports = Direct, and Enrolment Status = Completed) with the Learning Items view enabled so that the manager can see the detail of learning items their team have completed. The manager has saved this search for future use.

< Team Learnin	g			Actions
Search by learning items	٩			
Reports Direct reports X	Enrolments Enrolment Status Completed	Enrolment Type Completed Date	Learning Rem Type Departme	Filters Clear (2) Completed Envolments
3 items			Sort By 💌 Learners	Learning Items
Information Security En Expected effort is 0.5 - 1h	ssentials	Learners 1		
Equality and Diversity Expected effort is 1 - 1.5h	Essentials	Learners 3		
Data Protection Essent Expected effort is 0.75 - 1P	ials h	Learners 3		

From this screen, selecting a course title you are interested in will show the data relating to your teams' enrolments.

Data Protection Ess	sentials			Send Reminder 📼	Switch Team
Search by learners	٩				
Reports Direct reports 🛛 🗙 Enrollments	Enrolment Status Comple	ted × Enrolment Type	Completed Date Learning Item Type	Department Business Unit	Filters
Cear (2)					
3 items				Sort By	• 🛃
		Completed 18/05/2023	Envolvment Status Completed		4
00000 ································		Completed 11/08/2023	Evolment Status Completed		4
		Completed 16.005/2023	Erectionant Status Completed		4

Tips:

- You can use the bookmark icon to create and save a search for future use
- Exporting from this type of search will show only the on-screen data in the downloaded file
- Please ensure that any downloaded reports are stored in accordance with the University's <u>Data</u> <u>Protection | Data Protection</u> and <u>Records Management | Data Protection</u> guidance.
- There are many more filters available accessed by selecting

Search the catalogue of learning

1. From the home page navigate to **My Team** then **Learning**.

< Team Learning			Actions 🔻	Switch Team
Search by learners Q Reports Direct reports Concollinents) Enrollment Type Due Date	Enrolled on Date Completed Date	Filters Clear (1)		Д
3 items		[Sort By 💌 Learners	Learning Items
	Required O	Voluntary 3		
	Required O	Voluntary 5		
	Required O	Voluntary 5		

2. Select **Search** from the lower left of screen.



3. Enter a key word into the **Search bar** and select the magnifying glass to search. and/or use the filters to refine your search. You can combine filters and use the **Clear** function to remove

An example search result for the keyword <u>Team</u>, filtered to show only Self-paced learning is shown below.



4. From the results click on the course title, to open a card with more information, where you can **Learn More** (see more details) or **Assign to My Team**.



Assign learning to your team

1. Use **Search** from bottom left of screen to find the learning item you'd like to assign and select it to show more information



2. Choose the option Assign to My Team to display the following screen

e a Better Manager by Motivating Your Team					Cancel	Assi
Assignment details						
Assignment Type	•	Start Date	Ē]		
, Due Date	required	Context Segment]		
				J		
Context Segment						
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team		Offering Be a Better Manager by Motivating	/our Team ▼]		
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team		Offering Be a Better Manager by Motivating f you don't select an offering, each learner can	Your Team]		
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team Learners		Offering Be a Better Manager by Motivating I r you don't select an offering, each learner can	Your Team]		
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team Learners Selection Type Person		Offering Be a Better Manager by Motivating ' f r you dont select an offering, each learner can Select a person	Your Team make their own selection.]		
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team Learners Selection Type Person Directs		Offering Be a Better Manager by Motivating ' I r you don't select an offering, each learner can Select a person	Your Team			
Context Segment Learning items Select a learning item Be a Better Manager by Motivating Your Team Learners Selection Type Person Directs Organization		Offering Be a Better Manager by Motivating ' I r you don't select an offering, each learner can Select a person	four Team make their own selection.			

3. Complete the Assign Learning information

- a. Assignment type
 - i. Voluntary the assignee(s) can choose whether they enrol or withdraw
 - ii. Required the assignee cannot withdraw
- b. Start date select today's date
- c. Due Date select a future date
- d. Context segment fields should be left blank
- 4. Select a Learning Item
 - a. type in a title or topic here to search available courses
 - b. select the offering title if you'd like to assign a specific offering
- 5. Choose Learners, by selecting the appropriate information
 - a. Selection types available are
 - i. Person to assign to an individual
 - ii. Directs to assign to the direct reports of a manager in your hierarchy
 - 1. **Tip**: use this to assign to your own direct reports by choosing your own name in Select a person
 - 2. Organization assign learning to all employees in your hierarchy
- 6. Add a Note to Learners, if required
- 7. Justification field should be left blank

8. Select **Assign** from top left of screen. Once assigned you will be returned to your previous screen, and your team member will receive an email notification and bell icon about this assignment.

Tips:

You can also Assign Learning from My Team> Learning> Actions> Assign Learning

If you have additional security roles in People and Money, this will affect the contents of "select a person" available to you when choosing Person, Directs or Organisation.

Recommend learning

- 1. Use Search to find the learning item you'd like to assign and select it to expose more information.
- 2. Choose the option **Learn More** to show the screen below
- 3. Select the Actions button and choose the option Recommend



- 4. Add Comments
- 5. Search for the **Learners(s)** you want to recommend it to by using the +Add button. You can add multiple people to a recommendation.

6. Select **Recommend from top right of screen**

	Cancel Recommend
×	

Copy links

- 1. Use **Search** to find the learning item you'd like to share a link to and select it to expose more information.
- 2. Choose the option Learn More
- 3. Select the Actions button and choose the option **Copy Link**
- 4. The link will be copied to your computer clipboard for onward use

Record external learning

1. From the Team Learning screen, choose Actions then Record External Learning

Cream Learning Search by learners Reports Direct reports X Enrollments Current X	Q Enrollment Type D	Le Date Enrolled on Date Co	mpleted Date Filters C	Assign Learning Record External	Actions 🔻	Switch Team
3 Items		Required 1	Voluntary O	Sort By 🔻	Learners	Learning Items
		Required O Required	Voluntary 2 Voluntary			
		0	2			
월 My Team Q Search						

- 2. Complete the following information
 - a. Start date & completion date

- b. Learning item title and description
- c. Add Learners, with a note if desired. You can add multiple people here, if required.
- d. There is no need to populate the Context Segments or Justification fields.
- e. Select Record from top right of screen

Record External Learnin	g			Cancel Record
Completion details				
Start Date 26/03/2024	₿	Completion Date 26/03/2024		
Actual Effort in Hours 1		Score Achieved O		
Context Segment		Context Segment		
Learning item details				
Attended XXX Conference				
URL		Expected Training Hours		
Cost		Currency GBP	8	
UoE Learning Provider		Context Segment		
Description				
Learners				
+ Add				
KR KKKKKKKK			×	
Note to Learners				
Justification				
Justification to Approvers				