



THE UNIVERSITY *of* EDINBURGH

System User Guide

How to Change Direct Reports

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Introduction

This guide covers key tasks for **Line Managers** and **School/Department Administrators** in 'How to Change Direct Reports' system process.

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.
5. **Please do not leave any employees without a line manager.** If you do, the system will look like it has accepted this change but in the background, **it will cause an error** which will require specialist help to be resolved.
6. **Please consider the order in which you make complicated changes** involving a group of managers. Loops may be created in the system hierarchy **which will cause errors** and will not allow any actions to be taken until a specialist resolves. An example of this kind of change would be:
 - a. Trying to change A's manager from B to C (when C already reports to A), and then trying to change C's manager from A to B. In this instance, if the second change is made first, you can avoid creating a loop (error).

In Brief

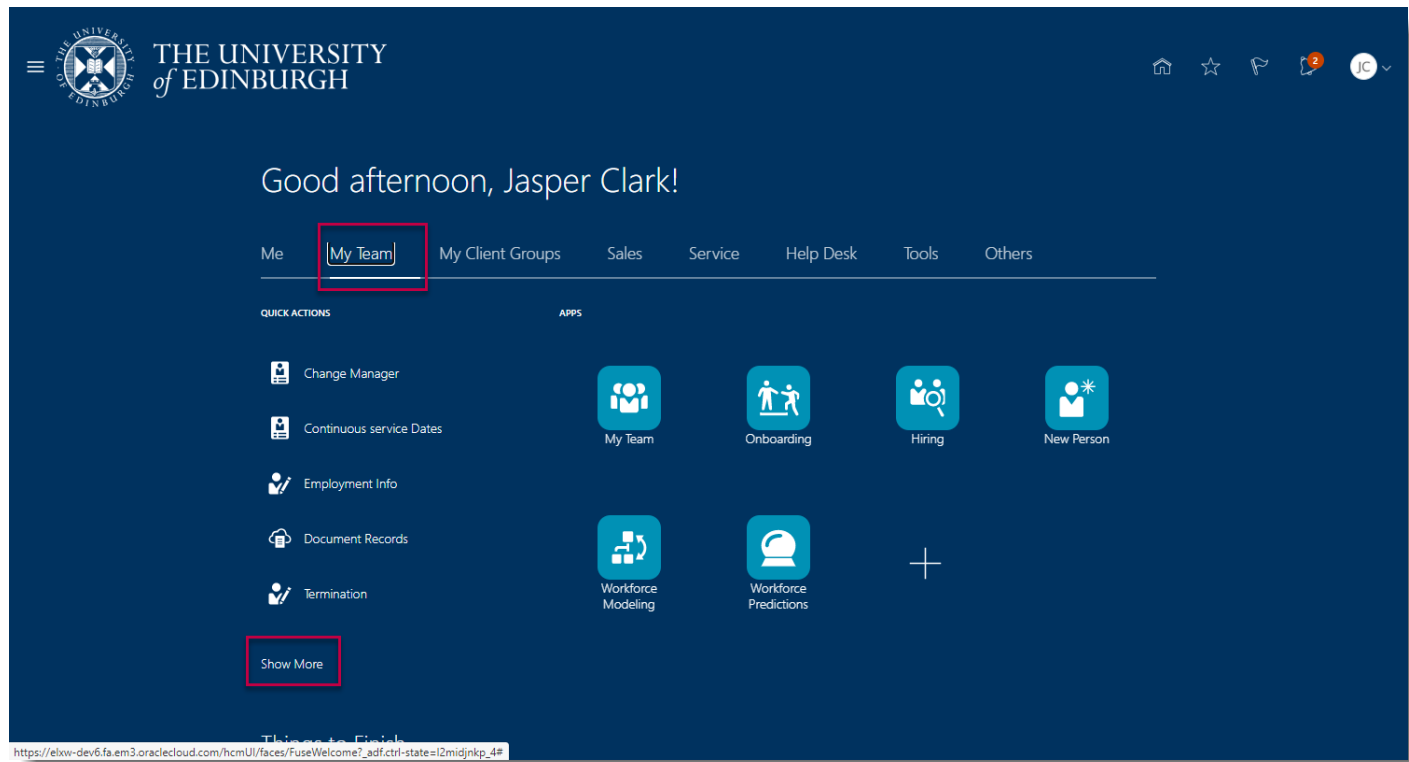
This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

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**.
2. In the Employment section, select **Direct Reports**.
3. Populate the search bar with their **Name, Person Number** or **Assignment Number**.
4. In the **When and Why** box, select the:
 - a. **Date** on which the change starts.
 - b. **Reason** for making these changes from the **Why are you making these changes?** dropdown menu.
5. Then press **Continue**.
6. **Existing Reports** will 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**.
7. If applicable, in **Direct Reports search** for people to add as new reports to the employee and then press **Continue**. If you are not adding any new direct reports, please press **Continue**.
8. If relevant, add in any **Comments and Attachments**. Then press **Submit**.

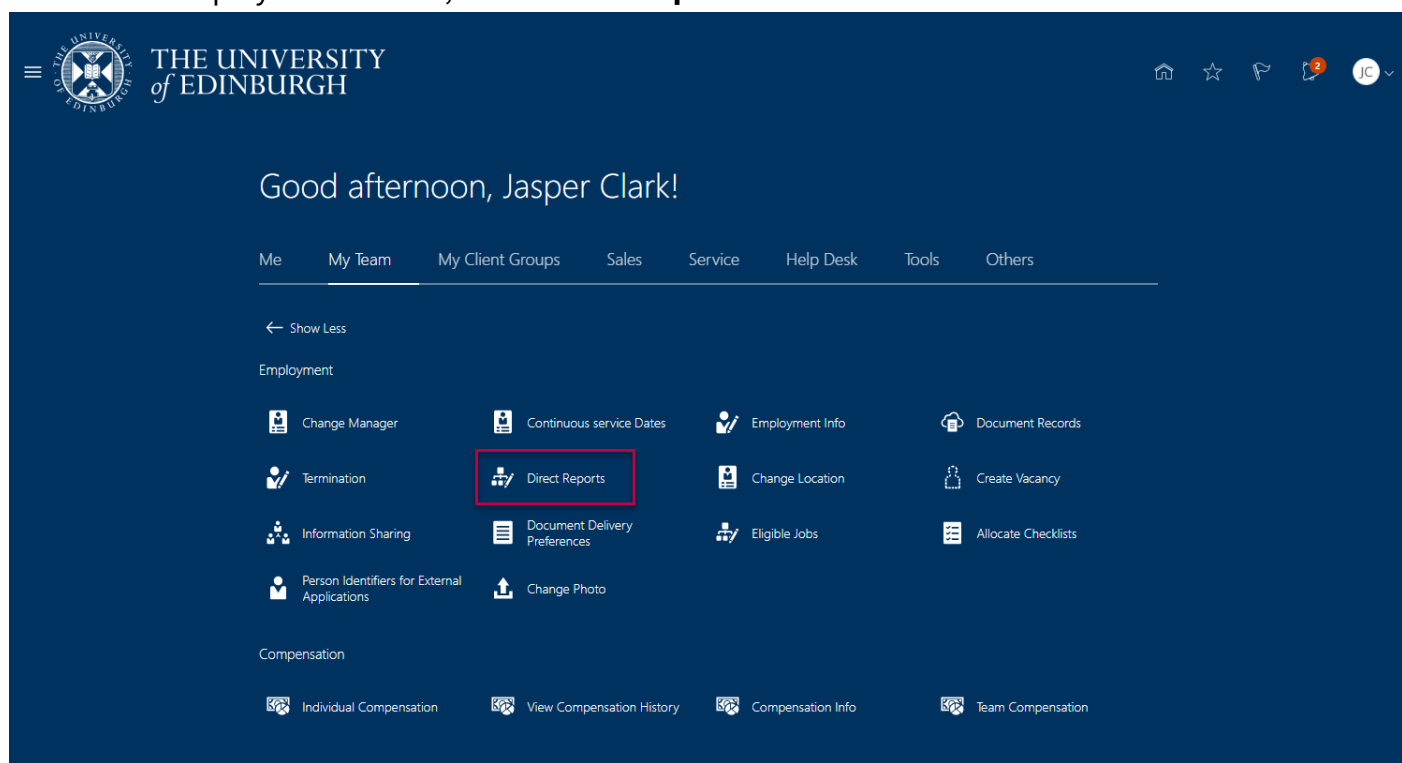
In Detail

This section provides the detailed steps and includes relevant screenshots from the system.

- 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**.

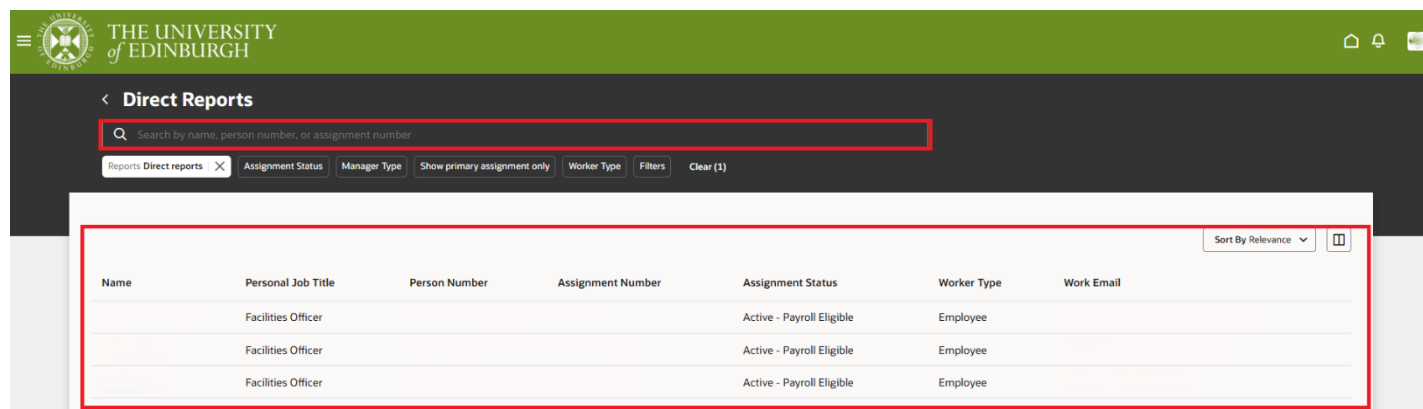


2. In the Employment section, select **Direct Reports**.



3. Populate the search bar with their **Name, Person Number** or **Assignment Number**. Alternatively, select from the list below the search bar.

If the employee holds multiple assignments, all numbers will appear in the search but you can use the filters to locate the correct record to update.



4. In the **When and Why** box, select the:
- a. **Date** on which the change starts.

Direct Reports

When and why

When do these changes start?

July 2025

What's the way to make these changes?

Cancel Continue Submit

- b. **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](#).

Direct Reports

When and why

When do these changes start?
22/07/2025

Why are you making these changes?

Action Reason	Action Reason Code
Addition of Assignment for Manager	MANAGER_ADD_ASSIGN
Addition of Employee Work Relationship for Manager	MANAGER_HIRE_ADD_WORK_RELATION
Change of Location of Manager	MANAGER_LOCATION_CHANGE
Change of Manager of Manager	MANAGER_MANAGER_CHANGE
End of Assignment for Manager	MANAGER_END_ASG

Cancel Continue Submit

Tips:

- As you move through the steps in direct reports, the fields and number of steps on the right may change as the action is selected.

- If an individual has a future dated assignment you will receive a warning message at the top. If the change is to continue **beyond** the date shown in the message, you will need to submit change the again.

Direct Reports

When and why

▲ This employee has a future-dated change

The start date change will be applied until the closest future assignment change start date of 1/09/2025.

×

When do these changes start?

Required

What's the way to make these changes?

Why are you making these changes?

Cancel

Continue

Submit

1 | 3

When and why

Direct reports

5. Then press **Continue**.

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Direct Reports

When and why

When do these changes start?

22/07/2025

Why are you making these changes?

Change of Manager of Manager

▼

Cancel

Continue

Submit

1 | 3

When and why

Direct reports

6. **Existing Reports** will 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**.

Direct Reports

Existing reports

☐ Select All

☐ Administrative Assistant (School Office)

☐ HR Assistant

☐ HR Assistant

☐ HR Assistant

Total Reports Selected

0

Search for proposed manager

Cancel

Continue

Submit

2 | 4

When and why

Existing reports

Direct reports

Comments and attachments

7. If applicable, in **Direct Reports search** for people to add as reports and then press **Continue**. If you are not adding any new direct reports, please press **Continue**.

The screenshot shows the 'Direct Reports' section of the University of Edinburgh's reporting interface. The header is green with the university's logo and name. The main content area is white and titled 'Direct reports'. A search bar with the placeholder text 'Search for people to add as reports' is highlighted with a red rectangle. Below the search bar, a message states: 'After you add direct reports, you can see them here.' At the bottom of the form, there are three buttons: 'Cancel', 'Continue' (highlighted with a red rectangle), and 'Submit'. On the right side, a dark purple sidebar indicates the current step is '2 | 3' and lists 'When and why' and 'Direct reports' as sections.

8. If relevant, add in any **Comments and Attachments**. Then press **Submit**.

The screenshot shows the 'Comments and attachments' section of the University of Edinburgh's reporting interface. The header is green with the university's logo and name. The main content area is white and titled 'Comments and attachments'. A red rectangle highlights the 'Comments' section, which includes a large text area for comments, a 'Drag and Drop' section with the instruction 'Select or drop files here.', and a 'URL' input field with an 'Add URL' button. At the bottom of the form, there are two buttons: 'Cancel' and 'Submit' (highlighted with a red rectangle). On the right side, a dark purple sidebar indicates the current step is '3 | 3' and lists 'When and why' and 'Direct reports' as sections.

Appendix

Reasons for Changing Direct Report

Action Reason (Why are you changing the manager?)	When to use this reason
Addition of Assignment for Manager	The Line Manager has taken on an additional role at the University.
Addition of Employee Work Relationship for Manager	Do not use.
Change of Location of Manager	The new Line Manager will be working from a different location
Change of Manager of Manager	SDA use only. This is to record when an SDA has changed the manager on behalf of a manager
End of Assignment for Manager	The Line Manager's assignment has ended
End of Temporary Assignment for Manager	The Line Manager's temporary assignment has ended
New Hire of Manager	The Line Manager is brand new to the University.
Promotion of Manager	The Line Manager has been promoted
Resignation of Manager	The Line Manager has resigned
Temporary Assignment of Manager	The Line Manager has taken on a temporary assignment
Transfer of Manager	The Line Manager has transferred to a new post

Version History

Version	Date	Description	Approved By
1.0	04 August 2025	<ul style="list-style-type: none">• Transferred guide to new template• Replaced all screenshots to reflect the new look of the Redwood screens	M Easton 01/08/25

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.