# Talent Studio User Guide
# For Administrators
## NHS Graduate Management Training Scheme
## Version 1.4

## Contents

# 1 Guide Overview

This guide should be used in addition to the latest Talent Studio User Guide for Trainees, Managers and Scheme Staff which describes the main functionality within Talent Studio and the configuration that has been implemented to support the Graduate Management Training Scheme.

This guide is designed to support the main administration tasks that Area Offices may be required to perform in their day to day activities and as a result of emails requesting Talent Studio support through the Graduateenquiries@leadershipacamdemy.nhs.uk email address.

Administrators also have access to the Analyser tab which allows the design of reports from Talent Studio in addition to the standard reports that have already been set up.  This functionality is not described here.

Hyperlinks have been included in the document to allow you to cross reference different tasks.

# 2 Talent Studio User Groups and Positions

There are five main Talent Studio user groups:

- Trainees
- Placement and Programme Managers
- Leadership Development Managers
- Administrators
- Senior Scheme Managers

Administrators and Senior Users have access to information according to their security domain and do not have positions or profiles on Talent Studio.

Placement/ Programme and Leadership Development Managers have access to information according to their assigned **position** on Talent Studio.

Positions in Talent Studio determine access rights and permissions.  If a position has another position reporting in to it (a 'subordinate'), then this position (or the person assigned to it) is deemed to be a Manager in the eyes of Talent Studio.  That means that that person is allowed to see details about the subordinate position and the person assigned to it.

NHS Graduate Scheme positions have been set up to satisfy the following requirements:

- Different managers in different organisations need to be able to access and edit information about the trainee at any time

- These different relationships need to be visible to the different people accessing trainee records i.e. who is the LDM, Programme and Placement Manager for a particular trainee and what organisations do they belong to?

A trainee holds three different positions to describe the relationship that they have with the LDM area, Programme Manager organisation and Placement organisation.

There may be a cross over between first and second placement organisation if the first Placement Manager still needs access when the second Placement has started.
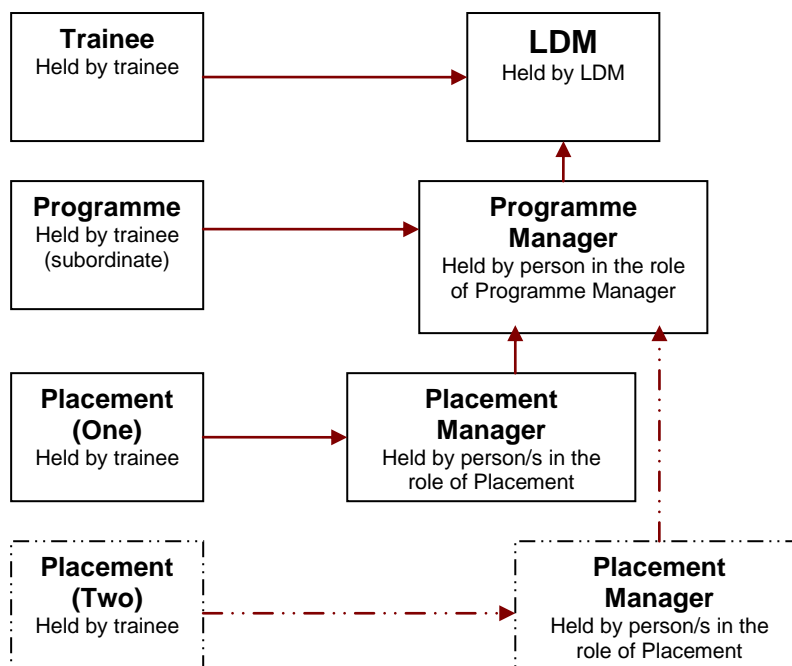
Every position has to report in to another, so for the purposes of Talent Studio the Placement Manager reports to the Programme Manager, and the Programme Manager reports to the LDM.

In some cases other managers within an organisation need to have the same access rights as the official Programme Manager or Placement Manager and these positions will then have more than one person assigned to them.

The position name has to be indicative of the role that that person has with regard to the scheme. **Their actual job title should not be used.**

A person may have more than one position on Talent Studio.

**Position Naming Convention**

A Placement or Programme Manager should always have the words 'Placement Manager' or 'Programme Manager' in their position title. This may be supplemented with other information such as the placement number. i.e. Second Placement Manager

A trainee's Placement or Programme position should always have the words 'Placement' or 'Programme' in their position title. This may be supplemented with other information such as the placement number. i.e. First Placement

# 3  Organisation Structure and Picker

Positions have to be assigned to an Organisation.

The organisation structure within Talent Studio has to reflect that the database caters for other NHS Users.

All organisations that relate to the Graduate Scheme can be found under **NHS Institute**. There you will find all areas and localities, and within these you should find the organisations where the trainees are placed.

In all cases where you need to select an organisation you will use the **Talent Studio Organisation Picker.**

The Organisation Picker works in the following way:

Select the grey button to the right hand side of the organisation field.
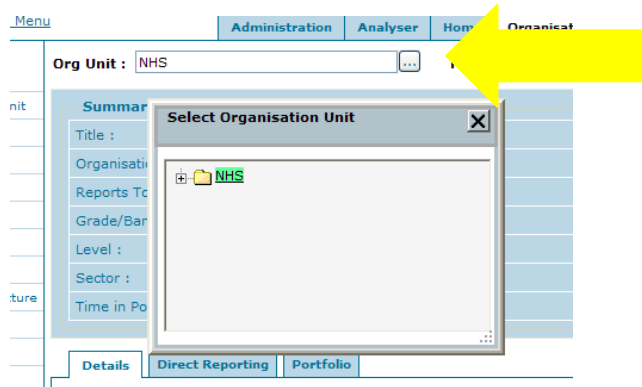


A box will open, with the NHS as the default organisation unit. Click on the 'plus' sign to open up the next level of the organisation structure.
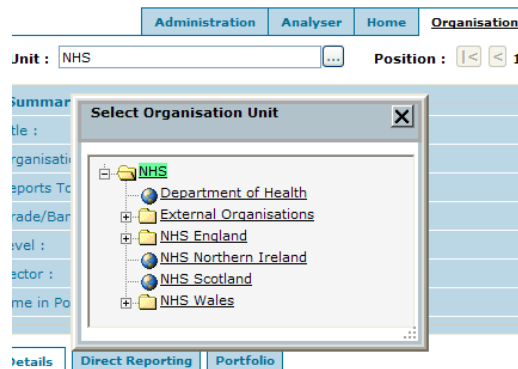


- Select NHS England
- Select NHS Institute
- Select NHS Graduates
- Then select appropriate area and organisation
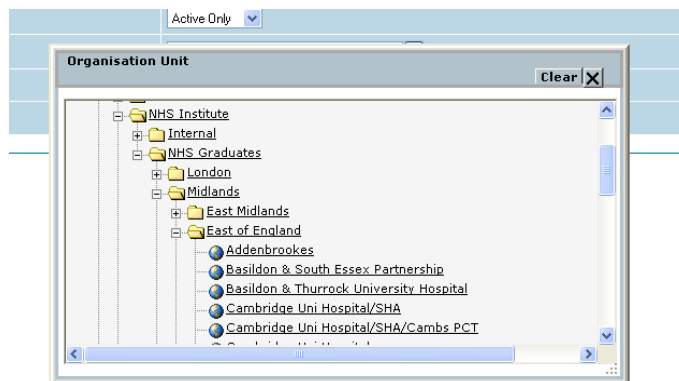


If you wish to close the box click **Clear** at the top right hand of the box.

**Please note:**
The NHS Institute organisation unit is almost a mirror of the other organisation units within the NHS **- it is very important that you select organisation units within the NHS Institute area when assigning all graduate scheme positions. Placing positions in the incorrect organisation may mean that other NHS users have access to trainee details when they shouldn't.**

This box is expandable and can be moved around the screen:

**To expand the box:**

Put your cursor over the grey dotted area in the right hand corner of the box. You will see a black double ended arrow. Click your mouse and then move the cursor in the direction that you wish the box to expand. You can make the box smaller in the same way.

**To move the box:**
Put your cursor in the grey area at the top of the box. You will see a black four ended arrow. Click your mouse and then drag the box to where you want it to go.

# 4  Organisation Tab/ Administration Tasks

Rather than go through each menu item available through the Organisation tab this guide takes the approach of describing each action you might want to do as an Administrator. The majority of these tasks can be done in the Organisation tab.

Please note that the screen shots used in the guide may contain more tabs on the top bar than you may be able to view but this should not make any difference to the actions that you can perform.
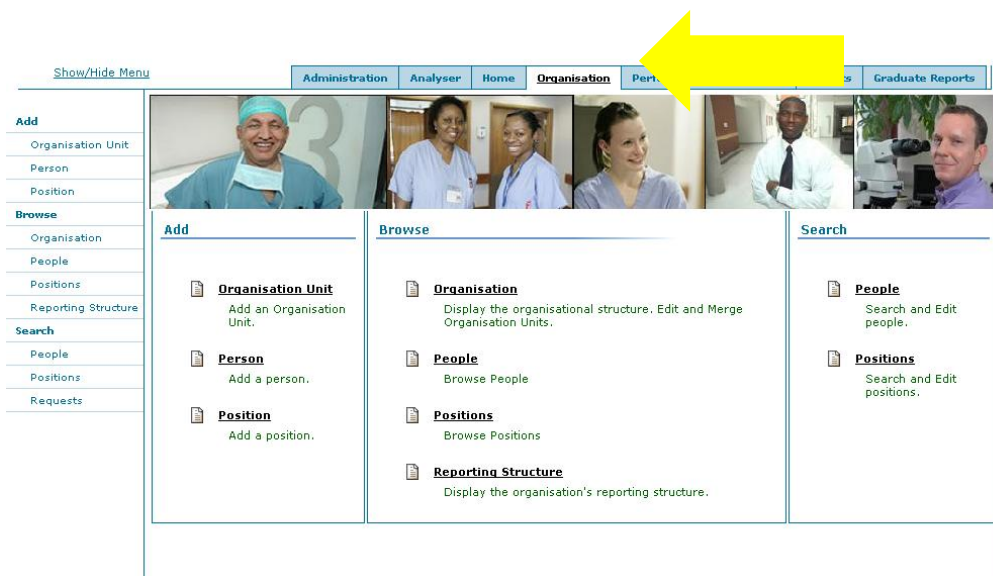


## 4.1     Adding a new Organisation

**1.**     Select the **Organisation** tab
**2.**     Click **Add Organisation** on the left hand menu

**3.** Enter organisation Name
**4.** Select the Organisation that is the parent of the new organisation (this will always be an area such as North West, or South East Coast etc) using the Organisation picker
**5.** Add any comments that you think are relevant
**6.** Click **Save**

## 4.2 Adding a new Position

**Please note that when you add a position the 'Reporting to' position has to exist first.**
**e.g. If you are adding a new Placement position for a trainee, the Placement Manager position has to be created first.**

**1.** Select the **Organisation** tab
**2.** Click **Add Position** on the left hand menu



**3.** Add position **Title**
**4.** Then click on the grey box to show the organisation picker:
- Select NHS England
- Select NHS Institute
- Select NHS Graduates
- Then select appropriate area and organisation (if the organisation does not exist then you will need to add it (see Adding a New Organisation)
**5.** Add Area and Locality – select from the pick list
**6.** Click **Next**
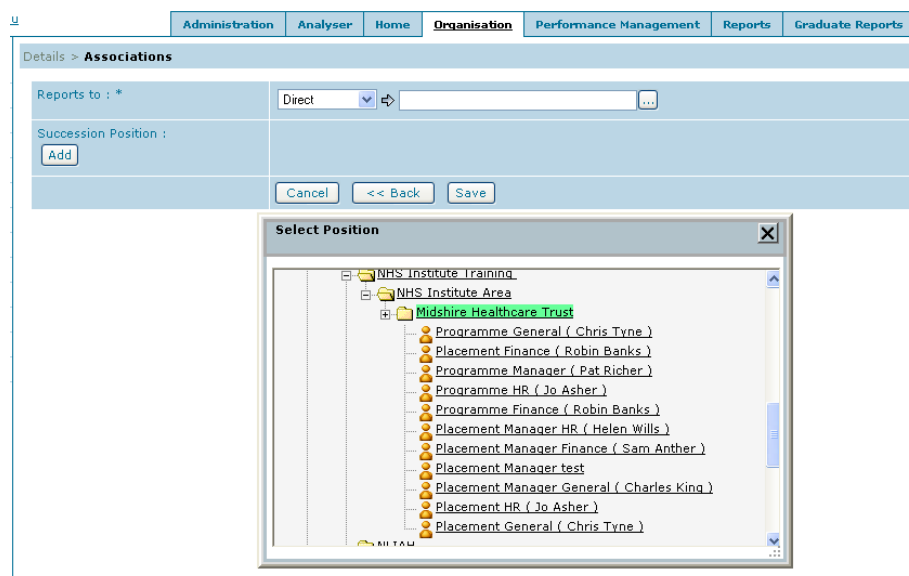
**7.** Select **Direct**
**8.** Then click on the grey box to show the organisation picker:
  - Select NHS England
  - Select NHS Institute
  - Select NHS Graduates
  - Then select appropriate area and organisation
**9.** A list of positions will appear with the position holders names in brackets
**10.** Select the Position that the new position reports to e.g.
    a. if new Programme Manager than select the appropriate LDM
    b. if new Placement Manager then select the appropriate Programme Manager

**11.** Click **Save**

**NB**: You cannot add a position without assigning it to an organisation or having it report in to another position. (See Talent Studio User Groups and Positions for a more detailed explanation)


## 4.3    Adding a new Person


**1.** Check first that the organisation and position exist on Talent Studio (see Browsing Positions within an Organisation).
**2.** If not add where necessary (see Adding a new Organisation or Adding a new Position)
**3.** Click on the **Organisation** tab
**4.** Click **Add Person** from the left hand menu

**5.** Enter details.  First Name and Last Name are mandatory but as best practice you should never set up a new person without an email address.
**6.** Click **Next**

**7.** Click **Add** to assign that person to their Talent Studio position



**8.** Select **Permanent** from the drop down box if adding a Placement, Programme Manager, or LDM
**9.** Then click on the grey box to show the organisation picker:
▪ Select NHS England
▪ Select NHS Institute
▪ Select NHS Graduates
**10.** Then select appropriate area and organisation
   a. **Note**:  If you put your cursor on the corners of this box and click you are able to resize the box
**11.** A list of positions will appear with the position holders names in brackets
**12.** Select the correct position for that person
**13.** Click **Save**

## 4.4    Adding a User Account

1. Select the **User Details** tab

| | Specialism : | - | | Intake Year : | - |
|---|---|---|---|---|---|
| | Programme : | - | | Cohort : | - |

| Details | osition | Scheme Details | Future Role | Career Summ | | ...es | **User Details** | Organ |

**Add**

**User Detai...**

Person has not been assigned a user account.

2. Click **Add** to set up the account

3.

**Add User Account Information**

**Login Details**

| User Name : | |
|---|---|
| Password : | |
| Repeat new password : | |
| Assign a home page group : | ▾ |
| Active : | ☑ |

**Assigned Roles**

| Access Roles : | Set All   Clear All |
|---|---|
| | ☐ Administration Arena |
| | ☐ Analyser Arena |
| | ☐ Organisation Arena |
| | ☐ Organisation Data Role |
| | ☐ Performance Management Arena |
| | ☐ Succession Builder Arena |
| | ☐ Talent Identifier Arena |
| | Cancel   Save |

4. Add username and password (see [How to Generate a Password](#)) – the username is normally in the format Firstname.Lastname

5. Assign them to the appropriate home page
   a. if Placement/Programme Manager = Grad Local Manager,
   b. LDM = Grad Area Manager

6. Ensure that the Active box is ticked – this allows people to log in to the system

7. Assign them to the appropriate roles:
   a. Placement/Programme Manager – **do not select anything for this**
   b. LDM – select Succession Builder Arena only

8. Click **Save**

9. **NB:**   You cannot add a new person without assigning them to a position.
   a. Administrators and Trainees need to be added by the system administrator (currently Vanessa Wilderink).

## 4.5   Deleting a Person

1. Deleting a Person is a **two step process**

**2.** Find the person that you want to delete (see Searching for People)
**3.** Click on that person's User Details tab



**4.** Then delete their User Account by clicking Delete
**5.** Then click **Delete** on the top left hand side of the person's Summary
**6.** You will be asked to confirm deletion



**All Placement and Programme Managers should be fully deleted from the system when they no longer have any trainees, even if there is a possibility that they may have more trainees in the future.**

## 4.6   Searching for People

**1.** Click on the **Organisation** tab
**2.** Click **Search People** on the left hand menu

3. Enter your Search criteria
4. You can search by Name, Organisation, or Population
5. Click **Search**
6. The next screen will then display all the search results



7. Click on the hyperlinked Last Name to go to that person's details, or alternatively select the Browse tab to scroll through the different results.

## 4.7    Adding a new Position to a Person

1. Find the person who's position you are changing (see Searching for People)
2. From their profile click on the **Position** tab
3. Click on **Edit**

**4.** Click **Add** to add a new Position



**5.** Add the information for your new position
**6.** From the drop down select:
- Permanent if it is a new Programme position.
- Select Placement One, Two etc if it is a new Placement Position.

**7.** Then using the Organisation picker, select the position that is being added.
**8.** If the position does not exist yet see Adding a New Position

## 4.8    Changing Reporting Position

1.    Find the person who's position you are changing (see )
2.    From their profile click on the **Position** tab
3.    Click on the position that you wish to change





4.    Click **Edit**
5.    Should see Direct Reporting for the positions held by that person.

1. Click on the grey box to show the organisation picker:
   - Select NHS England
   - Select NHS Institute
   - Select NHS Graduates
   - Then select the new position in the appropriate area and organisation
   - If anyone is assigned to the position they will be listed in brackets after the position name
2. Click **Save**
   .

## 4.9     Updating a Person – new password, new user name, Home page etc

1. Find the person (see Searching for People)
2. Click on the **User Details** tab
3. Click **Edit** on this page to update a user name or home page group
4. Click **Change Password** on this page to change their password



5. Please note that current passwords are not displayed; if a person has forgotten their password you will need to enter a new one.
6. Select **Save** to save your changes

Please Note: Clicking Delete on this page will only make them non-active; to properly delete a user please see Deleting a Person

## 4.10    Updating/ changing a Person's email address

1.    Find the person (see Searching for People)
2.    Look on the **Details** tab for that person
3.    Click **Edit**



4.    Make the changes as necessary
5.    Click **Save** at the bottom of the form

## 4.11    Browsing Positions within an Organisation

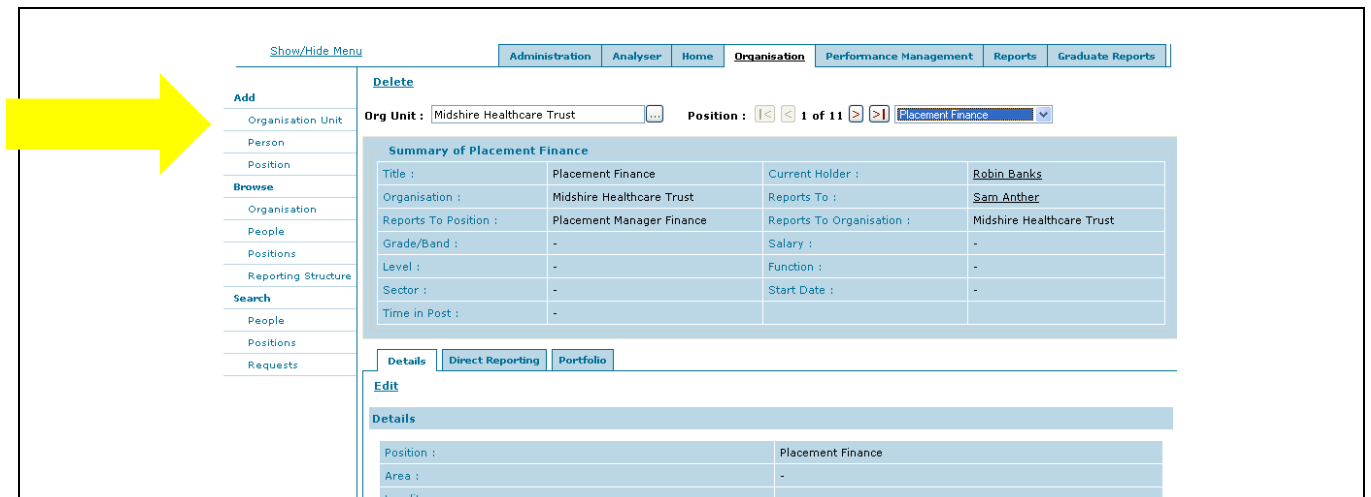1.    Click on the **Organisation** tab
2.    Click on **Browse Position** on the left hand menu



3.    Select your Organisation from the Organisation Picker
4.    If the organisation is not there it will need to be added (see Adding a new Organisation)

5.  You will then be able to scroll through or select from the drop down all the positions that exist within that organisation and see details about who holds the position and who that position reports to.
6.  Click on **Edit** to change the title of the Position
7.  Click on the tab **Direct Reporting** to see who the positions reports to, and whether it has any subordinates
8.  Click on **Edit** in this tab to change who the position reports to.  Note it is not possible to change who the subordinates are; this can only be done by making changes to the subordinates positions directly.
9.  Clicking on the hyperlinked names will take you to that person's details

## 4.12   Replacement or Additional Manager (same placement)

1.  Check that the new manager is not on the system already (see Searching for People)
2.  If the Manager is not on the system already, find the relevant trainee (see Searching for People)
3.  Click on the name of the current Manager



4.  Click on **Current Position**

**5.** Click on tab labelled **Direct Reporting**



**6.** Is there more than one trainee listed in the Subordinates section i.e. does this person manage more than one trainee?

**7.** Will this Manager need access to all the trainees listed as subordinates?

| **YES – the new manager will need access to all the trainees listed as subordinates:** |
| --- |
| This is just a direct replacement/ addition of a new Manager <br><br> A. Add the new Manager (see Adding a new Person) – you will be adding this new Manager to the same position as the old manager <br><br> B. When complete, delete the previous manager ONLY if you are replacing the manager.  See Deleting a Person |

<table>
<tr><td>C. Send the new Manager their login details using the <u>email template provided</u></td></tr>
</table>

| **NO – the new manager will not need access to all the trainees listed as subordinates:** |
| --- |
| A. You will need to add a new Position to Talent Studio (see <u>Adding a new Position</u>)<br><br>B. Add the new Manager (see <u>Adding a new Person</u>) and assign them to this new position<br><br>C. Send the new Manager their login details using the <u>email template provided</u><br><br>D. If this is an additional manager rather than a replacement make sure that the current Manager is also assigned to this role<br><br>E. Make sure that the corresponding trainee/s position reports in to this new position (see how to <u>Change Reporting Position</u>) |

**8.** Is the previous Manager still managing the other trainees? (subordinates)

| **YES – they are still managing other trainees** |
| --- |
| A. Do not delete the previous Manager as they will still need access to the other trainees |

| **NO – they are not managing trainees anymore** |
| --- |
| A. Delete the previous manager (see <u>Deleting a Person</u>) and add their new manager when their details are known. |

## 4.13 New Placement with a new Placement Manager

**1.** Check that the new manager is not on the system already (see <u>Searching for People</u>)

**2.** <u>Add a new position</u> for the Placement Manager in the new placement organisation ensuring that it reports in to the appropriate Programme Manager for that trainee

**3.** <u>Add a new position</u> for the trainee in the new placement organisation ensuring that the new position reports in to the new position just added for the Placement Manager

**4.** Add the new Manager (see <u>Add a new Person</u>) to Talent Studio assigning them to this new position

**5.** Assign the trainee to their new position (<u>changing position</u>)

**6.** Send the new Manager their new login details (see <u>Email</u> text)

**7.** When the previous Placement is complete and the manager no longer needs access then delete the manager ONLY if they do not need to access other trainees (see <u>Deleting a Person</u> )

## 4.14 Trainee status has changed i.e. left the scheme early, on maternity leave or long term sickness

1. Find the trainee using Searching for People

2. Click on the tab called **Scheme Details**



3. Click **Edit**

4. Select the new **Status** of the trainee and click **Save** at the bottom of the form

**If the trainee has left the scheme early:**

Remember to delete their user account so they can no longer log in.

1. To do this click on the tab called **User Details**



2. Click **Edit and** deselect the **Active** box.

**Delete any managers associated with this trainee who will no longer need access to Talent Studio.**

## 4.15   Trainee has transferred to another area

**1.**     Find the trainee using <u>Searching for People</u>

**2.**     Click on the tab called **Scheme Details**



**3.**     Click **Edit**

**4.**     **Edit the following fields:**
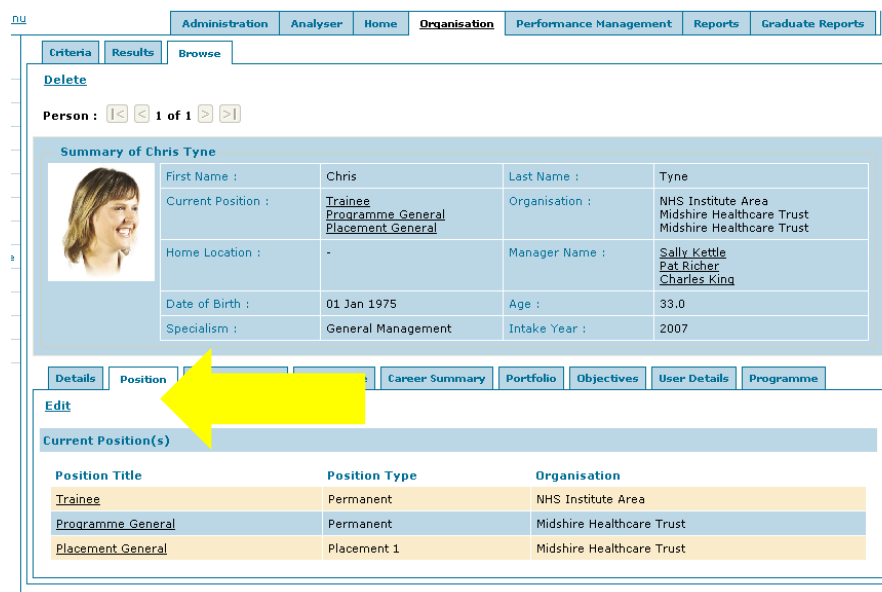
**Foundation Group – select the new region (if applicable)**
**Local Induction Group  - select the new area**
**Transferred from – select the area that the trainee is transferring from**
**Transfer Date – select the date of transfer**

**5.**     Make changes to the Programme and Placement Managers as applicable (see <u>New Placement</u>)

**6.**     Reassign the trainee to the relevant LDM.  Click **Edit** on the **Position** tab.

**7.**   Click the grey box to the right of the **Trainee** position.

**8.**   Select the Trainee position in the area that they transferring to and then click **Save.**



## 4.16   Adding a User Account to an existing person

**1.**   Find the person (see Searching for People)
**2.**   Click on the **User Details** tab



**3.**   Click **Add** on this page to update a user name or home page group



**3.**   Add username and password (see Updating a Person – new password, new user name, Home page etc)

**4.**   Assign them to the appropriate home page

      a. Trainee – select appropriate Graduate Trainee Intake
      b. if Placement/Programme Manager = Grad Local Manager,
      c. LDM = Grad Area Manager

**5.** Ensure that the Active box is ticked – this allows people to log in to the system

**6.** Assign them to the appropriate roles:
      a. Trainee – **do not select anything for this**
      b. Placement/Programme Manager – **do not select anything for this**
      c. LDM – select **Succession Builder** Arena only

**7.** Click **Save**

# 5 Scheme Details

When viewing people's profile you will see that you have an additional tab called **Scheme Details** available to you other than the Details, Position and Portfolio tabs.

Scheme Details is only available to Scheme Staff i.e. LDMs and Administrators. Trainees, Placement and Programme Managers do not have access to this tab.

This tab holds all details relevant to the trainee on the Scheme e.g. Intake year, specialism, education provider details etc.

To Edit any of the details on this form click the **Edit** button.



Field Details and their options:

| Status | Future Intake | Trainee due to start in the next intake |
|---|---|---|
| | Current Trainee | Trainee currently on the Scheme |

| | | Graduate | Trainee who has successfully graduated the first part of the Scheme |
|---|---|---|---|
| | | Alumni | Alumni |
| | | Non-graduate | Trainee who has not successfully graduated the first part of the Scheme |
| | | Maternity | Trainee on authorised maternity leave |
| | | Long Term Sickness | Trainee still on Scheme but signed off as long term sick |
| | | Ex-trainee – not completed Scheme | Trainee who has resigned from the Scheme early |
| **Intake Year** | | Should be pre-populated | Year that the trainee joined the Scheme |
| **Graduation Year** | | Select from a list of years | Year that the trainee graduates from the first part of the Scheme |
| **Specialism** | | Should be pre-populated but can be amended | Specialism i.e. HR, Finance or General Management Note: because this is a shared database this field might contain options that do not relate to the Graduate Scheme |
| **Finance Qualification** | | Select CIMA or CIPFA | |
| **HR Group** | | Select from the list of a or b | |
| **BPP College** | | Select from a list of BPP Colleges | |
| **CIMA MPL** | | Select from Certificate, Managerial, Strategic or TOPCIMA | Applicable to Finance trainees only |
| **General Group** | | Select from a list of numbers | |
| **Action Learning Set Group** | | Select from a list of numbers | |
| **Foundation Group** | | Select from a list of regions | |
| **Local Induction Group** | | Select from a list of areas | This field should reflect the trainees' Locality |
| **Middlesex University** | | Free text field | Student ID Applicable to HR trainees only |
| **CIMA Candidate ID** | | Free text field | Student ID Applicable to Finance trainees only |
| **Birmingham University** | | Free text field | Student ID Applicable to General Management trainees only |
| **Transferred from** | | A list of Institute Areas | This field is to be used when a trainee transfers to a different area |
| **Transfer Date** | | Select a date | This should note the effective date of transfer |

Click **Save** when you have made your change.

# 6  Running Reports

## 6.1    To run a report from the menu

Select the report that you wish to run from either the Home Page left hand menu or the Graduate Reports left hand menu.
The report will run automatically using the default population and the results will be displayed on the screen.

Click on hyperlinks from within the report to go to that person or positions details.

## 6.2    To run a report with a different population

**To change Population:**

Click on the Run Options tab

Select from the drop down list which population you wish to include in the results.
If you want to change how the report is ordered you can change the Order By and Sort Order.
Click Run to display the results of the new report on the screen.

## 6.3    To export the results to an Excel spreadsheet

**To download the report to Excel**

Click **CSV export**

Click **Export**
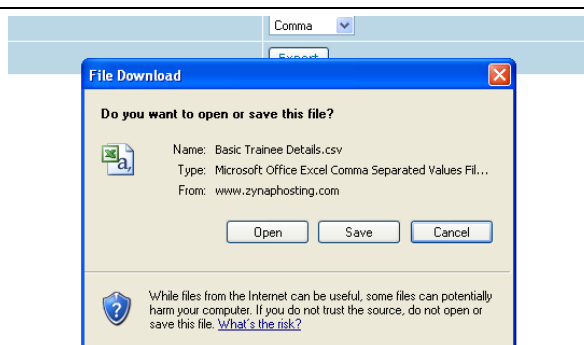
Follow the instructions in the window dependent on whether you want to **Open** or **Save** your report.

If you choose to open your report a new excel window will be opened containing the results of your report.

**Remember to save your file as an excel file i.e. .xls**

# 7  Frequently Asked Questions

## 7.1     I can't log in/ I get an error when I log in

**System Messages on Login and what they mean**

| |
|---|
| *Invalid login. Please make sure that you have entered a correct username and password.* |
| The user has entered an incorrect username or password |
| *You have exceeded the maximum number of attempts allowed to login.* |
| An incorrect username or password can only be entered three times in one go before the user account is locked.<br><br>**The user can re-set their password by using the Forgotten Password link – they will need to enter their username and provided they have an email address on Talent Studio, their password will be emailed to them and their account unlocked.** |
| You could not be logged on to Outlook Web Access. Make sure your domain\user name and password are correct, and then try again |
| It means the user has clicked the TalentScope URL from within an email being viewed in Webmail.  They need to cut and paste the URL in to the address bar of Internet Explorer and they should then be able to access Talent Studio. |
| 3 The page cannot be displayed<br><br>The page you are looking for is currently unavailable. The Web site might be experiencing technical difficulties, or you may need to adjust your browser settings. |
| This could mean a number of things but one thing to check is that they have entered the URL correctly i.e.<br><br>**https**://www.ynshosting.com/nhs<br><br>Please note particularly the '**S**' in https – they will not be able to get access to the login |

page if this **s** is missing.

## 7.2    How to Generate a Password

Passwords can be generated automatically by the following website:

http://www.pctools.com/guides/password/

Click on Generate Password and a password will be randomly generated.  Cut and paste this in to the persons account details. (see Updating a User – new password, new user name, Home page etc)

TIP:  Save this URL to your Favourites in Internet Explorer so that it is handy at all times.

## 7.3    My Programme/ Placement Manager has changed

Please see the sections called Replacement or Additional Manager (same placement) or New Placement with a new Placement Manager dependent on the circumstances.

## 7.4    I haven't received any login details for Talent Studio

Check that this person is actually on Talent Studio - see Searching for People

If they are, check that we hold a valid email address for them, update where necessary.

Reset the password and send them their login details using the email template.

If they are not on Talent Studio add them as a new person but check to see what positions they need to be assigned to and what trainees they should have access to.

Note: Administrators and Trainees need to be added by the system administrator (currently Vanessa Wilderink)

## 7.5    Talent Studio Login details – Email Text:

Please use this template when issuing login details to Programme or Placement Managers:

Dear <Programme/Placement Manager Name>

We have been notified that you will be the <Programme/Placement> Manager for <trainee name>  from the NHS Graduate Management Training Scheme.

Talent Studio is an on-line performance management tool that holds your trainee's performance portfolio.  This develops as they progress through the scheme, capturing information such as performance reviews, progress in their specialism competencies, placement planning, placement job descriptions and objectives, personal development plans, academic achievements and feedback from the Assessment Centre.

You can access Talent Studio through the following link https://www.ynshosting.com/nhs/login.htm

Your Login Details are as follows (please enter them exactly as you see them):

Username:
Password:

Please do not divulge this password to anyone as Talent Studio contains personal information.

The Talent Studio User Guide can be found on the home page of Talent Studio and also as an appendix to the Scheme Handbook which is available here: http://www.institute.nhs.uk/graduate/general/graduate_trainee_-_handbook.html.  You will need a user account to access this part of the website. Please call 0845 300 8027 in order to have this set up.

If you require any further information please do not hesitate to contact us on
Graduateenquiries@leadershipacamdemy.nhs.uk
Regards
The NHS Graduate Scheme Team

## 7.6    Re-issue of a Password – Email text

Please use this email text when sending out re-set passwords.

Dear <name>

Your password has been reset to:  <new password>

Once logged in please do change your password to something more secure.

Regards

## 7.7    System Errors

Very occasionally the user will get a system error.

They will see something like this:

```
A System Error has occurred and a message has been sent to support.
Please contact your system administrator and report the error details displayed
and the steps that lead to the error occurring.

Click here to view details of the error.
```

Even though an email is automatically sent to the software supplier we still need to capture more information.

Ask the user what they were doing at the time of the error

If they are still able to ask them to view the details of the error and cut and paste it in to an email

Send the above to Talent Studio support along with the name of the person who had the error.

## 7.8    I can't write anything in my Performance Review form

Is this question coming from a trainee?

If so, the majority of the form is manager-write only (for obvious reasons!).  Trainees can only complete the section called Meeting Details.  The rest of the form needs to be completed by a manager.

Is this question coming from a manager?

There have been a few instances where Managers have been unable to write in the Comments boxes on the form.  We think it is due to the browser they are using; it seems to be solved by performing the following steps:

- Open the form in Edit mode
- Open a Comments box (the small square box with dots)
- Click on the top of the box and 'drag' it to the middle of the screen)
- The user should then be able to add Comments.

## 7.9    My Manager is unable to Save their ratings on my Competency Forms

This is possibly because the trainee has entered too much evidence on the Competency form.

There is a limit to the amount of text that can be entered here; and this was formalised at the beginning of February 2008.   Before that time there was a system limit that if exceeded caused Talent Studio to produce a system error.  The formal limit (slightly smaller than the system limit) was introduced so that the limit could be handled correctly.  If the trainee has large amounts of evidence they now have the option to upload a document containing full evidence in to their portfolio.  They have to summarise the evidence on the competency form and state they have uploaded further evidence in to their portfolio.

If the trainee entered their evidence before this was done they would probably have been able to save their evidence without an error (provided they didn't exceed the system limit).   Now that the limit has been formalised we potentially have an issue with managers going back in to the form, making a change and then trying to save.

In this case, the trainee will have to follow the new process above i.e. cut and paste the evidence in to a word document; upload this in to their portfolio, and summarise this in their competency

## 7.10   My Manager is not receiving emails from Talent Studio

Firstly check that their Manager is actually on Talent Studio (see Searching for People)

If they are then make sure that they have a valid email address on the system.  In order to send emails Talent Studio requires an email address, and obviously this needs to be correct.  Check the spelling if there is already an email address held.

Update the email address if necessary (see Updating/ changing a users email address)

If they are not on Talent Studio and they should be, then Add them as a New Person

## 7.11 Where do trainees enter information about their Mentor?

Mentor information can be entered on the form called Personal Information.  This is found in the group called Background Information in the trainee Portfolio.

## 7.12 My trainee has additional holiday entitlement or has balances to carry over from the previous year

**1.** Find the trainee using Searching for People

**2.** Click on the tab called **Portfolio**

**3.** In the group called **Administration** open the form called **Annual Leave Entitlement**

**4.** Update the appropriate fields

**5.** Add any comments as necessary.

## 7.13 How do I take a screen shot?

- Make sure that what you need a screen shot of is displayed on the screen
- Hit the Print Screen key (typically at the top of your keyboard)
- Open a word document
- Right click your mouse and select Paste

## 7.14 I am having problems with my Institute email address/ accessing my Inbox

Please reply to the email copying in **Support@gradscheme.institute.nhs.uk**

Remind the trainee that any problems of this nature should be directed to that email address.

The people that monitor that email address are generally really quick at dealing with their support emails.

You can use the following email template:

Hi <trainee name>

You need to contact support@gradscheme.institute.nhs.uk if you have problems with your institute email.

I have copied them in on this email so hopefully they will be able to help you.

Kind regards

# 8 Worked Example of Changing a Programme Manager
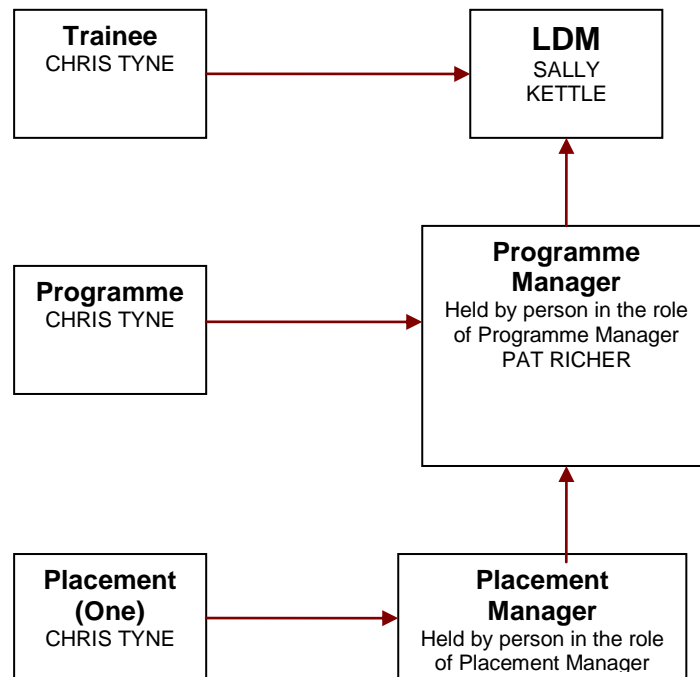


Receive a communication from Chris Tyne that her Programme Manager is changing (currently Pat Richer).

New Programme Manager is called James Bradford.  He is based at Midshire Healthcare Trust.

Check that the new manager is not on the system already (see Searching for People)

He is not on the system already so find the trainee who's Manager has been replaced (see Searching for People)



Click on the name of the Manager who is being replaced i.e. Pat Richer

Click on **Current Position**

Click on tab labelled **Direct Reporting**



**Is there more than one trainee listed in the Subordinates section i.e. does this person manage more than one trainee?**

Yes, there are currently three trainess:  Jo Asher, Chris Tyne, and Robin Banks

**Will the new Manager need access to all the trainees listed as subordinates?**

In this case No

---

**NO – the new manager will not need access to all the trainees listed as subordinates:**

---

F.  **You will need to add a new Position to Talent Studio (see Adding a new Position)**

In this case you will need to set up a second Programme Manager position in the organisation called Midshire Healthcare Trust



G.  **Add the new Manager (see Adding a new Person) and assign them to this new position**

Details > Associations > **User Account**

**Login Details**

| | |
|---|---|
| User Name : | James.B |
| Password : | •••••• |
| Repeat new password : | •••••• |
| Assign a home page group : | Graduate Local Manager |
| Active : | ☑ |

**Assigned Roles**

Access Roles :   [Set All]  [Clear All]

☐ Administration Arena
☐ Analyser Arena
☐ Organisation Arena
☐ Performance Management Arena
☐ Succession Builder Arena
☐ Talent Identifier Arena

[Cancel]  [<< Back]  [Save]

H. **Send the new Manager their login details using the email template provided**

I. **Make sure that the corresponding trainee/s position reports in to this new position (see how to Change Reporting Position)**

| Administration | Analyser | Home | **Organisation** | Performance Management | Reports | Graduate Reports |

**Back      Delete**

**Summary of Programme General**

| | | | |
|---|---|---|---|
| Title : | Programme General | Current Holder : | Chris Tyne |
| Organisation : | Midshire Healthcare Trust | Reports To : | Pat Richer |
| Reports To Position : | Programme Manager | Reports To Organisation : | Midshire Healthcare Trust |
| Grade/Band : | - | Salary : | - |
| Level : | - | Function : | - |
| Sector : | - | Start Date : | - |
| Time in Post : | - | | |

| Details | **Direct Reporting** | Portfolio |

**Edit**

**Reports To**

| Name | Organisation |
|---|---|
| Pat Richer | Midshire Healthcare Trust |

**Subordinates**

None defined.

| Menu | Administration | Analyser | Home | **Organisation** | Performance Management | Reports | Graduate Reports |

**Direct Reporting for Programme General**

| Reports to : * | Direct ⇨ Programme Manager ( James Bradfor ... |

[Cancel]  [Save]

You can see that you have correctly assigned the position as James Bradford is listed in brackets next to the position

You can now see on Chris Tyne's Summary that James Bradford is now her Programme Manager

Is the Pat Richer still managing the other trainees? (subordinates)

| **Yes she is** |
| --- |
| We will not delete Pat Richer as she still needs access to Jo Asher and Robin Banks. |