People and Money system
We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk

School or Department Admin Guide - How to Add References To A Candidate Record
School or Department Admin
Estimated time to complete: 6 minutes

This guide covers how to add references to a candidate record at the recruitment stage of the hiring process. References are not stored within People and Money so will still need to be uploaded to Sharepoint as part of a preboarding task.

In Brief…

This is a simple overview of the process.

1. From the Home page, click the Navigator menu on the top left icon.

2. Expand the My Client Groups section and click Hiring.

3. In the Job Requisitions screen click on the job requisition hyperlink then click the Active Applications.

4. Select and view the Candidate for whom References should be uploaded for and click the Attachments tab.

5. Then upload the Reference documents to Candidate Job Submission record.

For detailed guidance, see the next section.
In Detail...

1. From the Home page, click the **Navigator** menu on the top left icon.

2. Expand the **My Client Groups** section.

3. Click **Hiring**.

4. In the **Job Requisitions** screen, search for the **Job Requisition** and select the **Applications** link.
5. Select and view the Candidate for whom References should be uploaded.

6. Select the **Attachments** tab.
7. Upload the Reference Documents to Candidate Job Submission record.

8. The document will show as attached to the Candidate record. Click the back arrow to return to Job Applications.
9. Reference is attached to **Job Application** record.
Please refer to the Glossary.