People and Money system

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School or Department Admin Guide- How to Search, View and Upload Employee Data
School or Department Admin
Estimated time to complete: 4 minutes

Assumed Knowledge:

1. School/PSG admin undertakes a check of the passport/visa documentation, takes a copy and verifies.

Searching and Viewing Employee Data

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

2. Open My Client Groups then click Person Management.

3. Search for the employee, click on the Name link and their Employment page opens.

4. Click on the Task icon and select the applicable menu option to view the details.

For detailed guidance, see the next section.

Uploading Employee Data
1. From the **Home** page, click the **Navigator** menu icon located at the top left.

2. Open **My Client Groups** then click **Person Management**.

3. Search for the employee, click on the **Name** link and their **Employment** page opens.

4. Click on the **Task** icon and select **Document Records**.

5. Click on the **Add** button in the **Document Records** page.

6. Select the **Document Type** and complete the online form.

7. Upload the document in the **Attachments** section and click **Submit**.

For detailed guidance, see the next section.

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**In Detail...**

**Searching and Viewing Employee Data**

1. From the **Home** page, click the **Navigator** menu icon located at the top left.
2. Open **My Client Groups**, and click **Person Management**.
3. In the **Person Management: Search** page, complete one or more the fields and press the enter key or click the **Search** button.

Matching results appear below the search fields.

4. Click on the employee’s link in the **Name** column and their employment information can be viewed in the **Employment** page.

5. To view other information about the employee, click on the **Task** icon to open the navigation menu.
6. Select a menu option, eg. to view the employee’s personal information, click on Person in the menu.

7. If the page contains several subpages, click on a tab to navigate to other information which opens in a new page.
8. After you have viewed the desired information, you can either:

a. Close the page by clicking on the small cross next to the page tab.
b. Click on the Task icon and select another menu option.
c. Click the Close button in the top part of the page and reopen the Person Management: Search page to find another employee.

Uploading Employee Data

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

2. Open My Client Groups, and click Person Management.

3. In the Person Management: Search page, complete one or more the fields and press the enter key or click the Search button. Matching results appear below the search fields.

4. Click on the employee’s link in the Name column and their Employment page opens.
5. Click on the **Task** icon to open the navigation menu and select **Document Records**.

6. To upload documentation for the employee, click on the **Add** button in the **Document Records** page.
7. In the Add Document page, click on the down arrow in the Document Type field and select the applicable document from the list, eg. “Drivers License.”

For a list of all the documents available for a School/Dept admin to view and upload, check the Appendix.

8. Complete the fields in the online form and with the relevant details.

Note:

a. Ignore the Context Value field.
b. The **Name** and **From Date** fields appear for all Document Types but **Issued On** does not. Only complete the fields that appear.

c. The **From Date** is the date the document was uploaded and the **Issued Date** is the date the document was issued.

9. To upload a document, click on the down arrow next to *Drag files here* or *click to add attachment* in the **Attachments** section, and select *Add File*.

10. Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.
11. Click **Submit** and the **Document Records** page opens with details of the uploaded document type and a message saying 'We are submitting your changes for approval'.
12. To upload another document for the employee, click the **Add** button and repeat steps 6 to 11. If not, return to the Homepage by clicking on the **Home** icon on the top right banner.

**Glossary**

Please refer to Glossary

**Appendix**

**Documents available to School/Dept admin for viewing and uploading:**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Right to work documents</td>
<td>Evidence of legal right to work in the UK</td>
</tr>
<tr>
<td>Casual worker - Right to work documents</td>
<td>Evidence of legal right to work in the UK</td>
</tr>
<tr>
<td>P45</td>
<td>Details of employee leaving work</td>
</tr>
<tr>
<td>Degree or Certificate</td>
<td>Qualification</td>
</tr>
<tr>
<td>Drivers licence</td>
<td>Driving licence</td>
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<tr>
<td>Application</td>
<td>Application</td>
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<tr>
<td>Recruiting</td>
<td>Recruiting</td>
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<tr>
<td>Recruiting Job Offer Letters</td>
<td>Job Offer</td>
</tr>
<tr>
<td>Employment agreement</td>
<td>Contract of Employment</td>
</tr>
<tr>
<td>Relocation - Repayment terms</td>
<td>Repayment terms - Visa</td>
</tr>
<tr>
<td>Relocation - Relocation repayment</td>
<td>Repayment terms - Relocation repayment agreement -</td>
</tr>
<tr>
<td>Relocation repayment agreement</td>
<td>Partner career transition repayment agreement</td>
</tr>
<tr>
<td>Resignation Letter</td>
<td>Resignation Letter</td>
</tr>
</tbody>
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