THE UNIVERSITY of EDINBURGH

People and Money system

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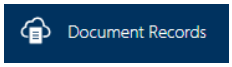
Line Manager Guide – How to Search, View and Upload Documents for Direct Reports

Line Manager

Estimated time to complete: 4 minutes

In Brief…

Searching for and Viewing a Document

1. From the Home page, click on **My Team**
2. Select **Show More** under Quick Actions
3. In the Employment section, click on **Document Records** 

4. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box
5. All the documents held against this employee's record should be listed on the screen

For detailed guidance, see the next section.

Editing a Document

1. Follow steps 1-4 above in the Searching for and Viewing a Document section
2. **Select** the document you need to edit
3. Then click on the **Edit** 

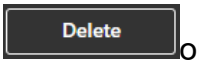
button on the top right
4. Once you've made the necessary changes, click **Save** 

For detailed guidance, see the next section.

Deleting a Document

1. Follow steps 1-4 above in the Searching for and Viewing a Document section

2. **Select** the document you need to delete
3. Then click on the **Edit** 

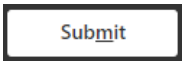
button on the top right
4. Click **Delete** 

on the top right of the page to remove the document.

For detailed guidance, see the next section.

Uploading a new Document

1. Follow steps 1-4 above in the Searching for and Viewing a Document section
2. Click on the **Add** 

button on the top right corner
3. From the Document Type dropdown menu, **select** the appropriate type of document you wish to upload
   For a list of all the available document types, go to the Appendix
4. **Fill in** the relevant details in the fields that appear and then press **Submit** 

   Note:

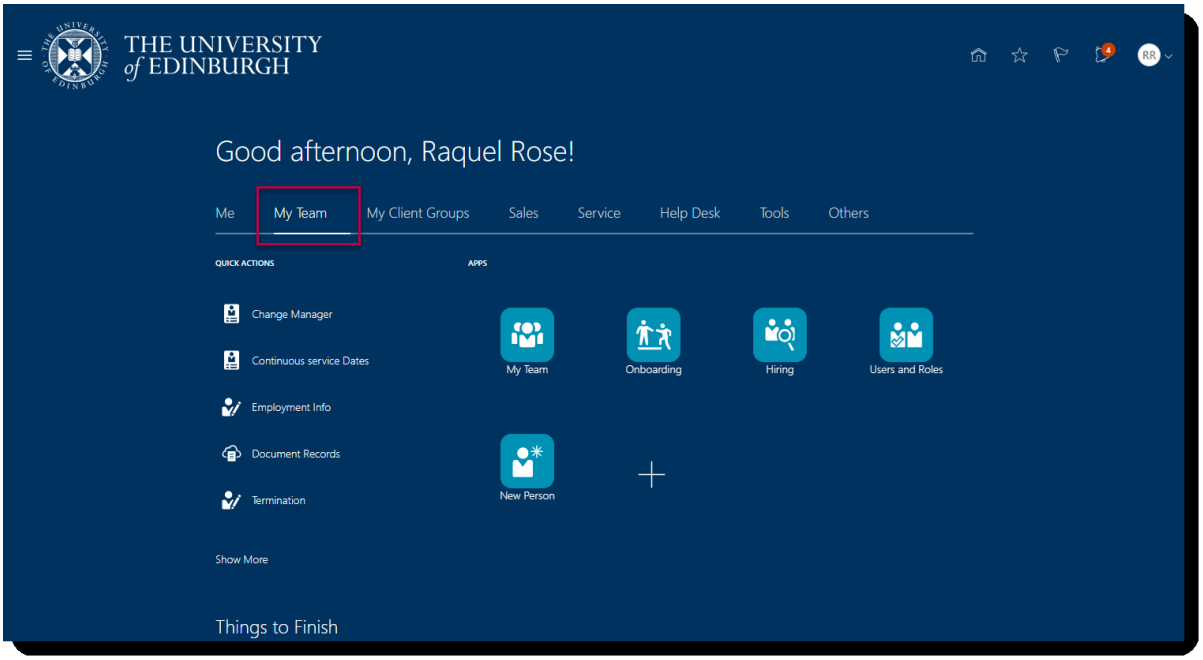
   a. Please ignore the Context Value field. This SHOULD NOT be filled out.
   b. The Issued On field does not appear for all document types. Only the ones that do appear need to be filled out.

For detailed guidance, see the next section.

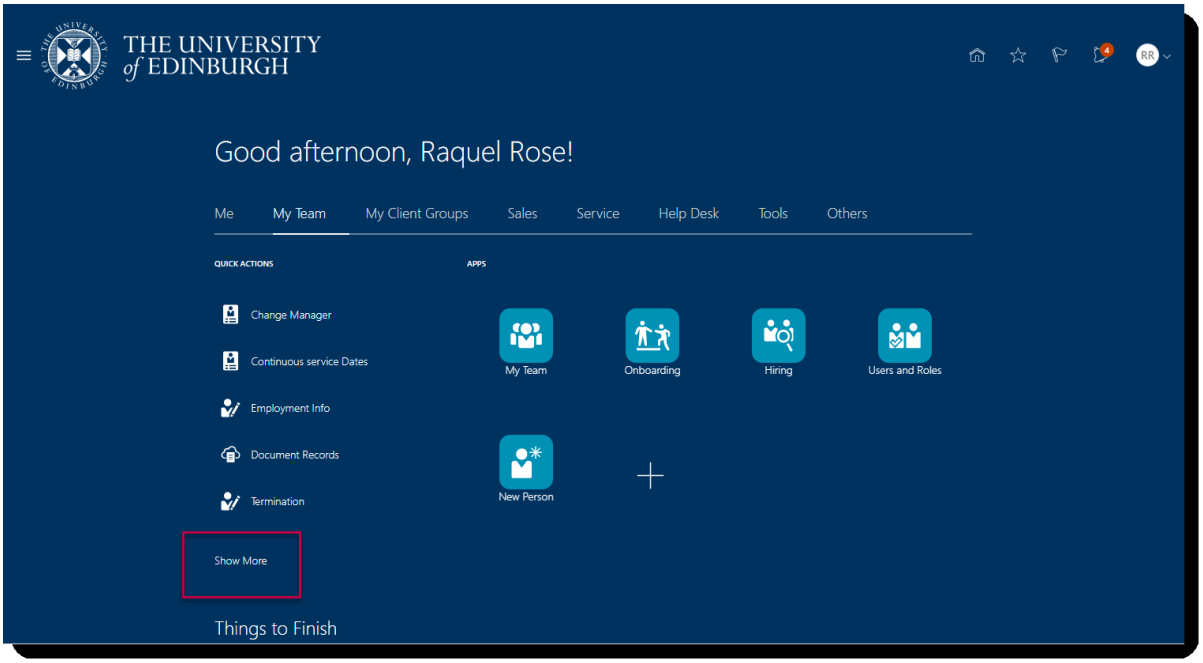
In Detail…

Searching for and Viewing a Document

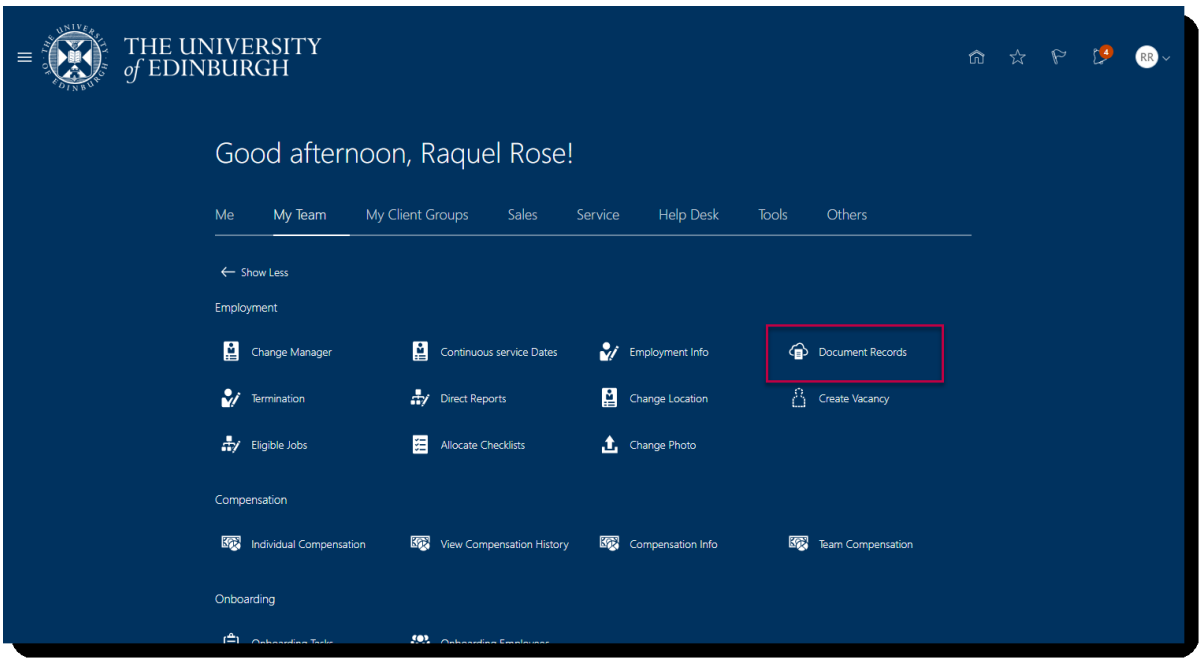
1. From the Home page, click on **My Team**



2. Select **Show More** under Quick Actions



3. In the Employment section, click on **Document Records**



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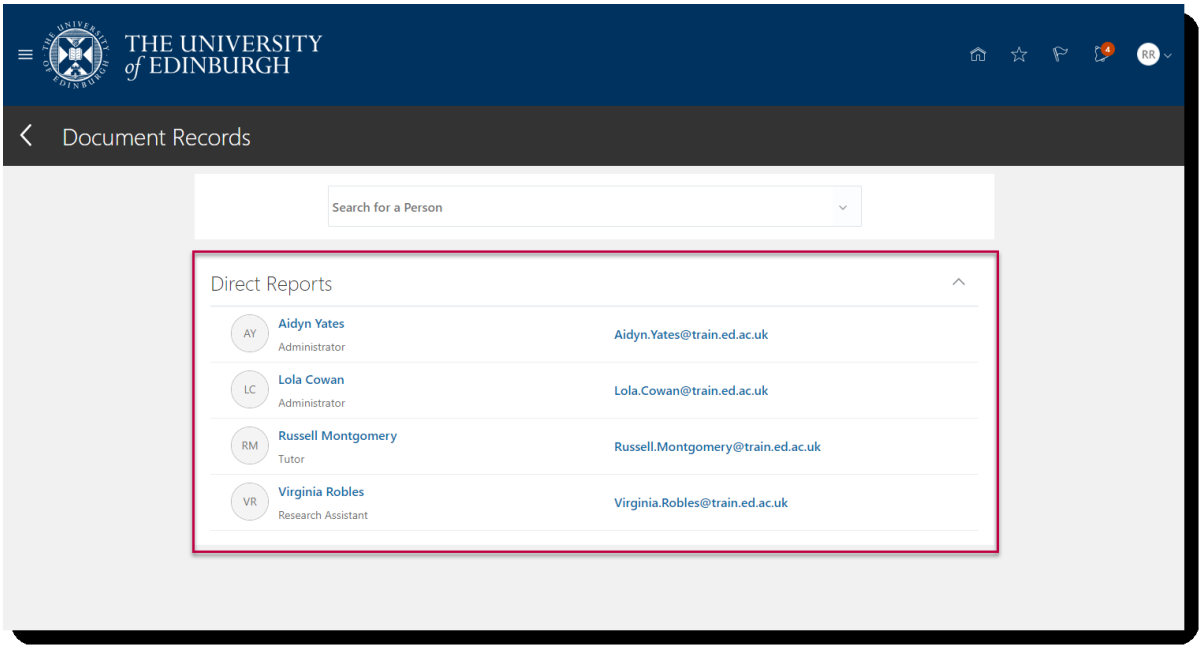

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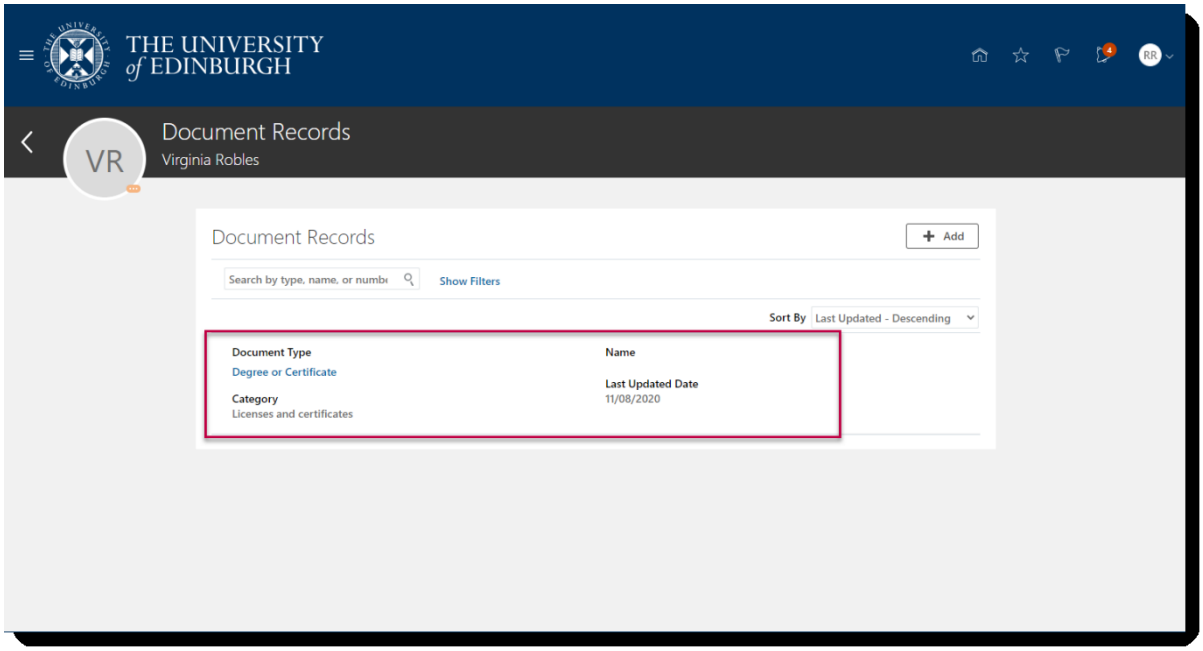

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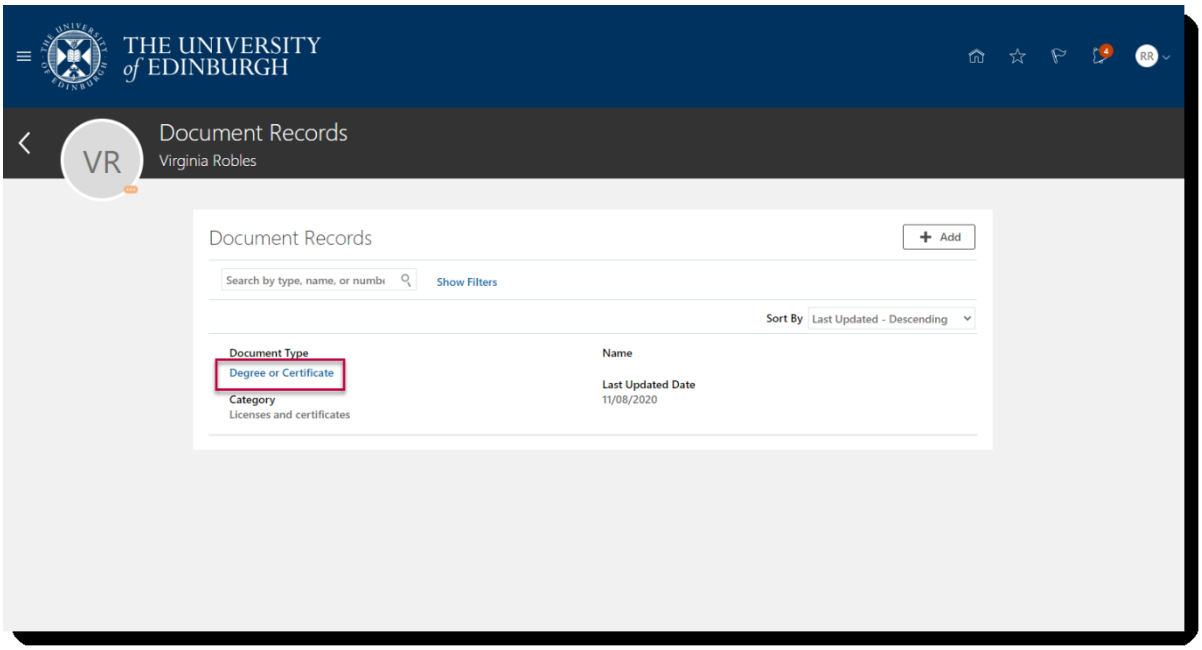
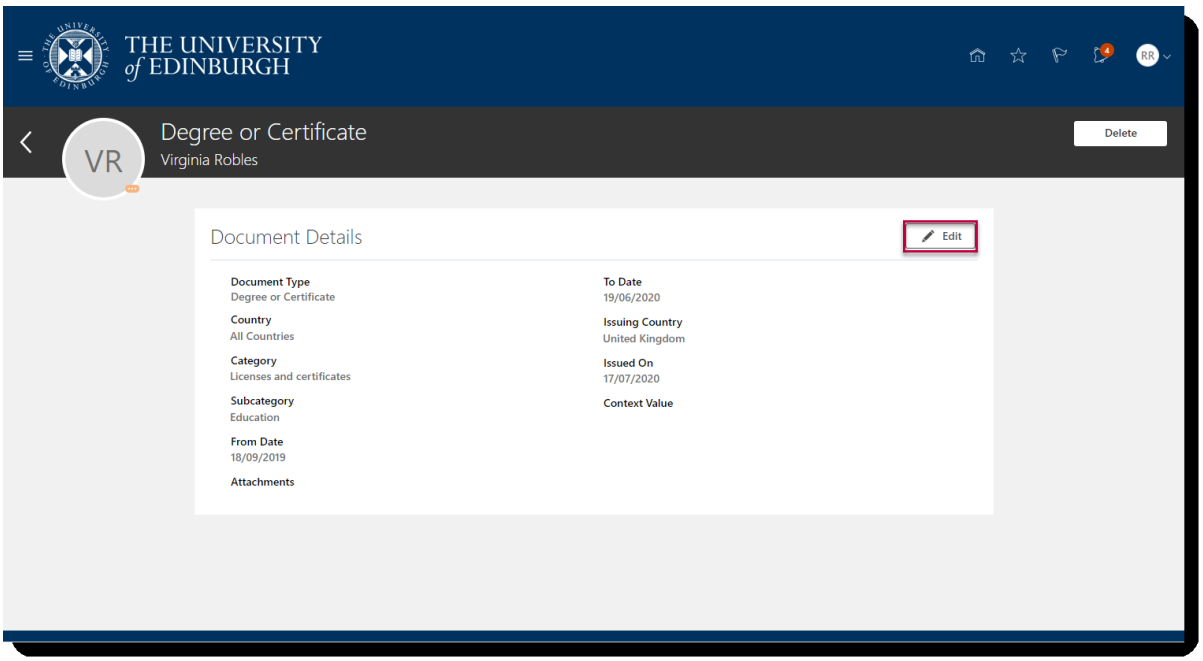
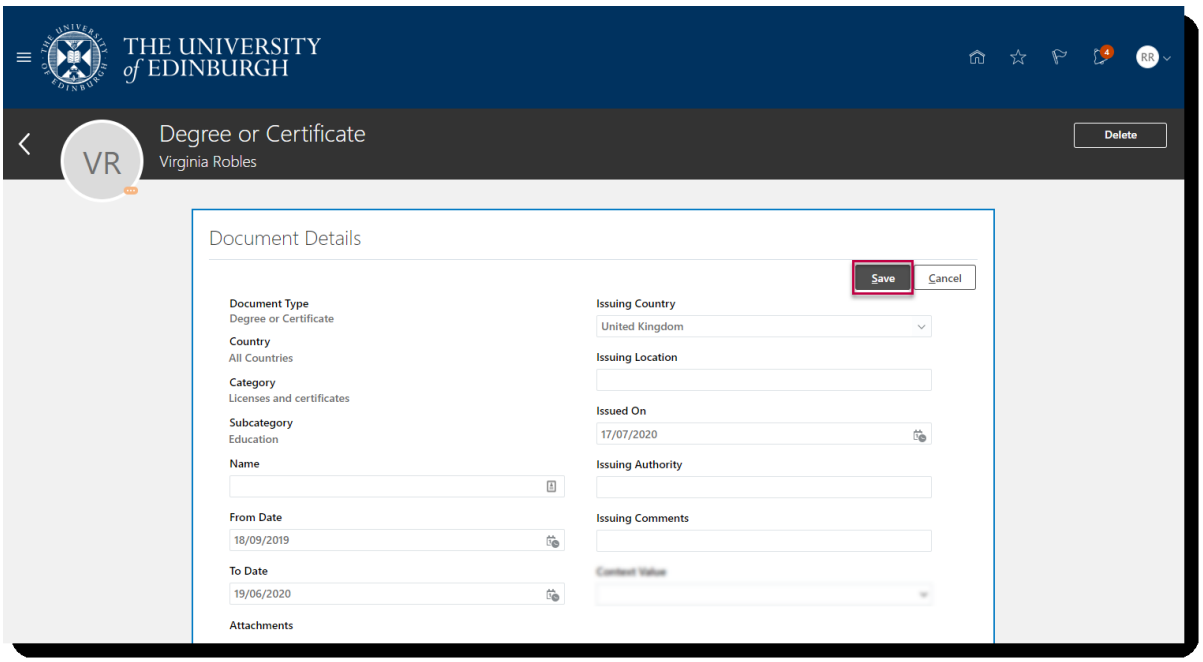


3. Then click on the **Edit** button on the top right



4. Once you've made the necessary changes, click **Save**



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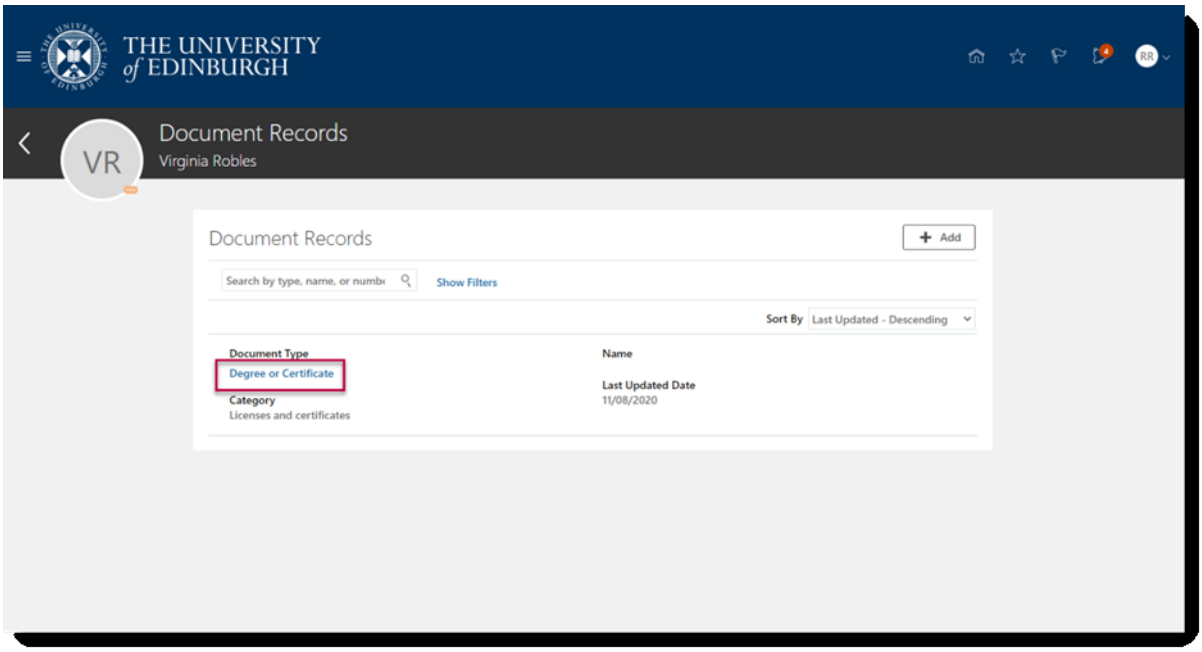

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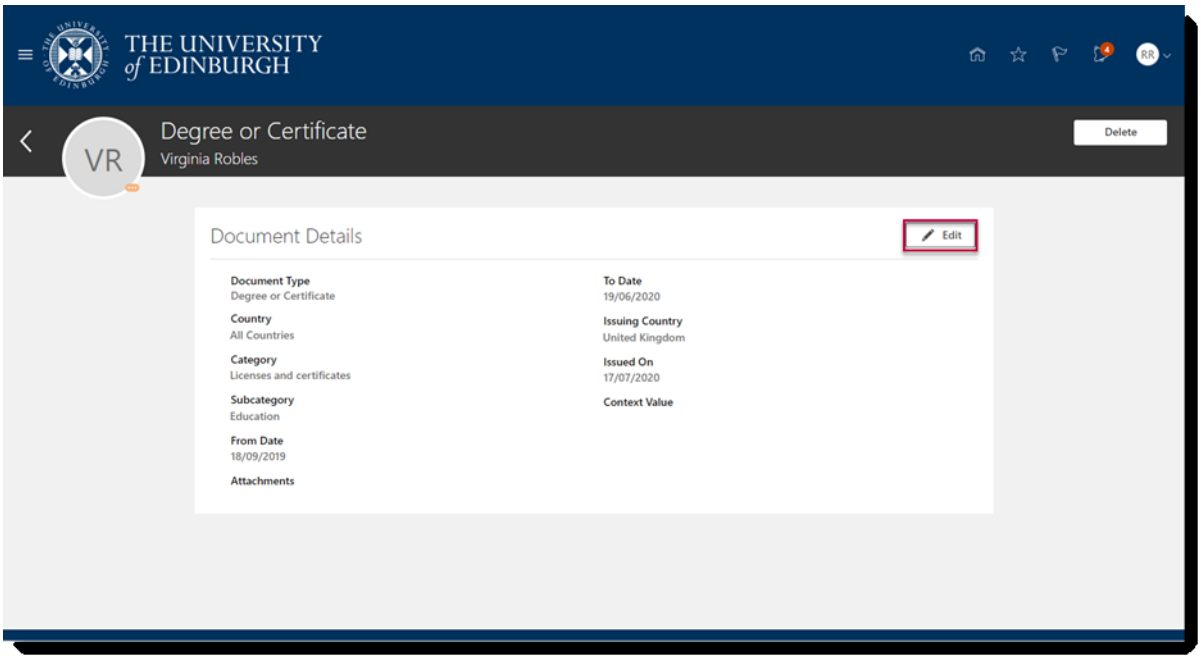
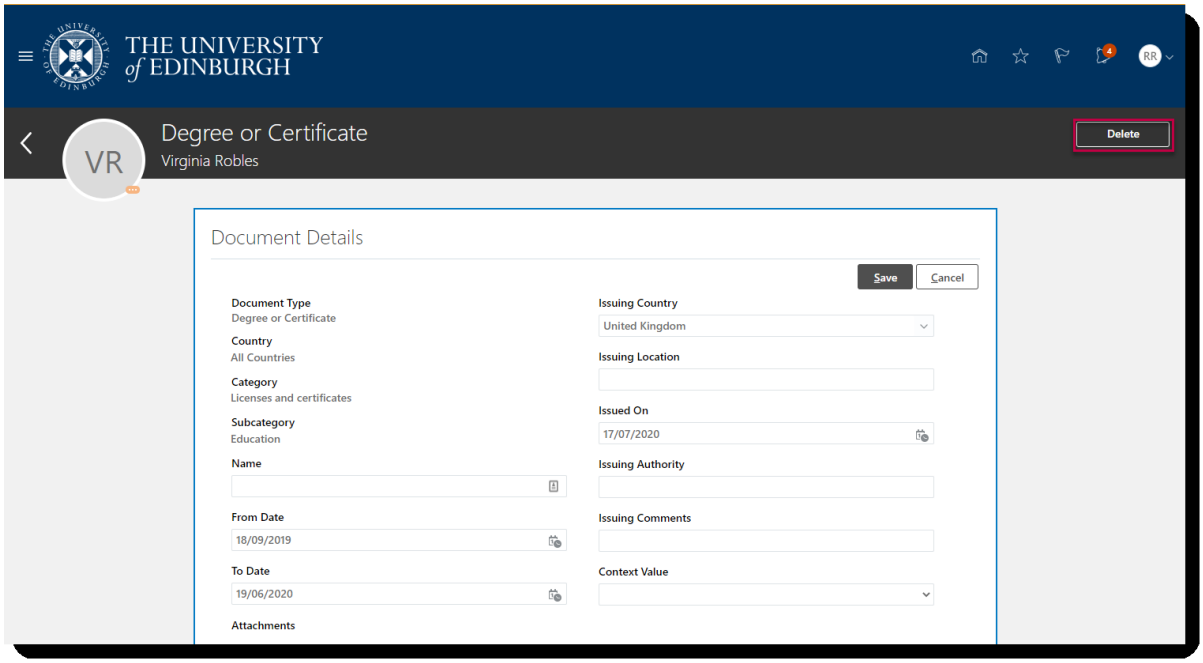


4. Click **Delete** on the top right of the page to remove the document.



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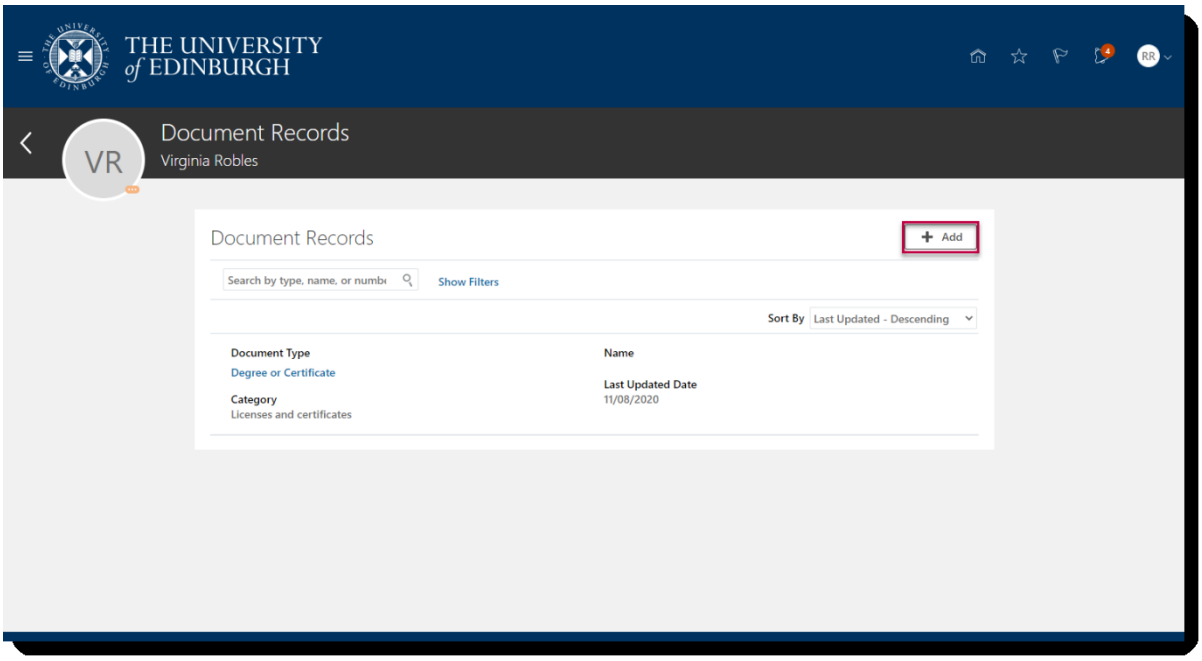
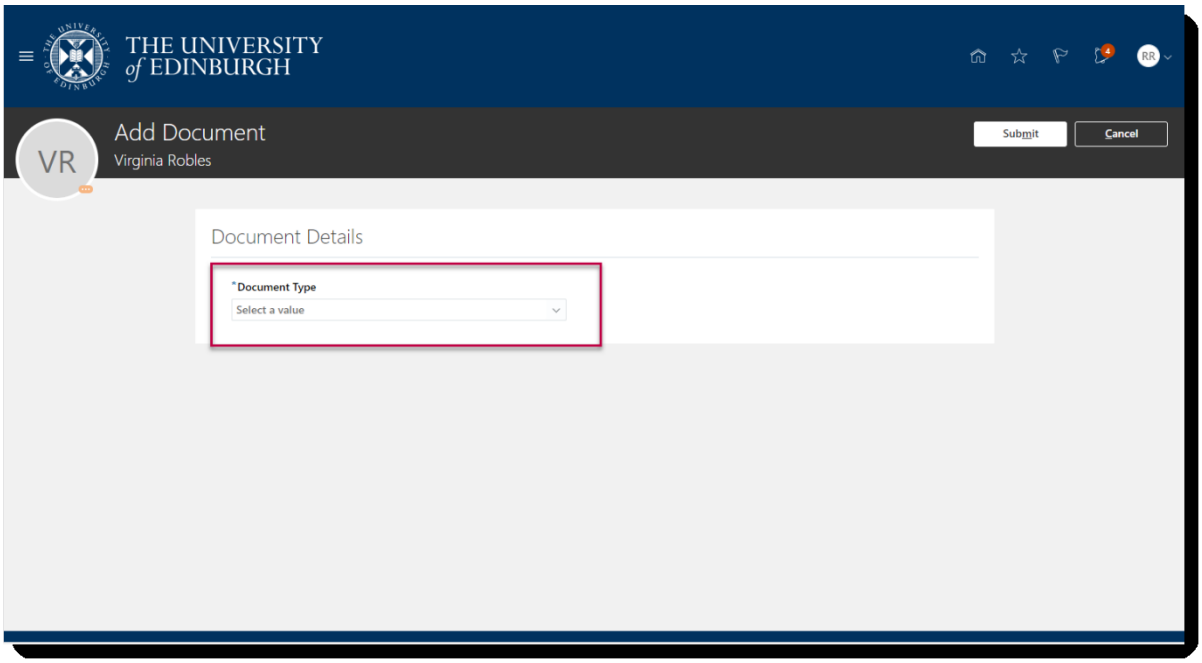
Uploading a new Document

1. Follow steps 1-4 above in the Searching for and Viewing a Document section
2. Click on the **Add** button on the top right corner

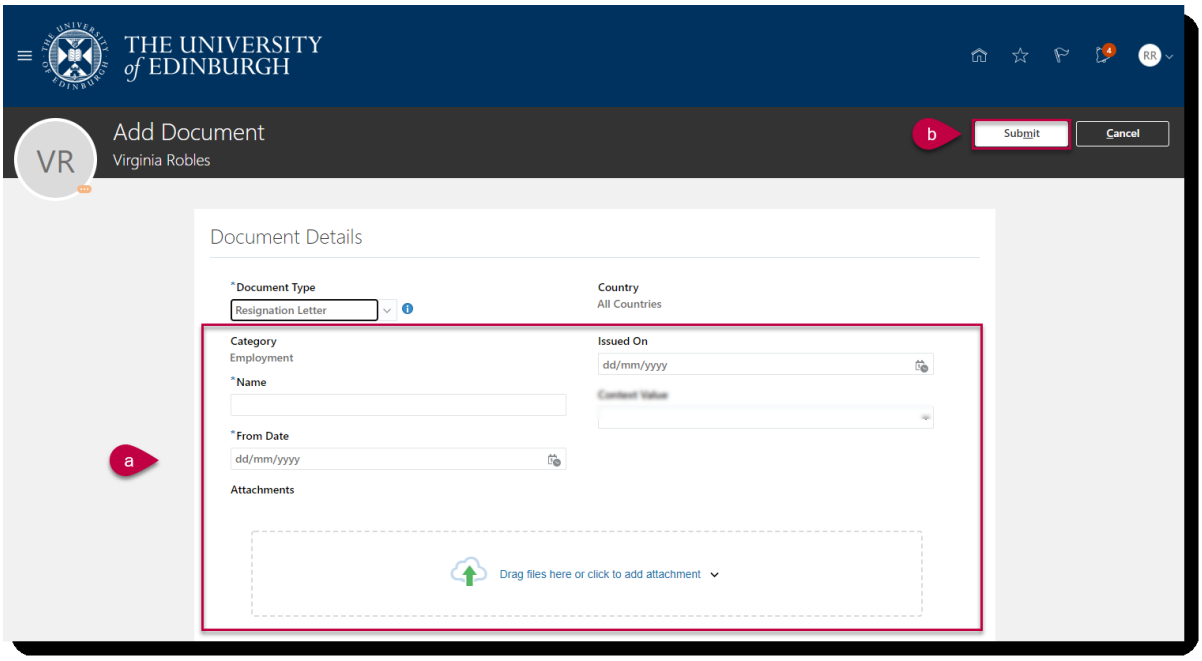


3. From the Document Type dropdown menu, **select** the appropriate type of document you wish to upload



For a list of all the available document types, go to the [Appendix](#)

4. **Fill in** the relevant details in the fields that appear and then press **Submit**



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Glossary

Please refer to Glossary

Appendix

Document Types available to Line Managers

1. Degree or Certificate
2. Resignation Letter

Document detail fields to be filled in

Document Type	Document Name	From date	To Date	Issued on
Degree or Certificate	Yes	Yes	No	Yes
Resignation Letter	Yes	Yes	No	Yes