Archived copy of the People and Money updates page

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People and Money-wide updates

Quarterly Update

The latest People and Money quarterly update was released on Monday 20 October 2025. For **HR,** the key updates include some system changes and fixes.

Journeys

Fixes

A fix has been applied to ‘Your Contract is ready to sign’ task, allowing pending workers/employees to view and complete the task within the Journey itself. This applies to the following Journeys:

- Welcome to the University (for new hires)
- Rejoining the University (for rehires)
- Getting Started in a New Role (for transfers and additional posts)

Pending Workers and Employees who could not previously see or act upon this task will now be able to complete the task in Journeys under My Tasks. If in this interim period (from June) they have followed the workaround steps, they do not need to complete this task. Line Managers/SDAs can check if a signed contract has been uploaded by navigating to Document Records.

Similarly, the issues users were experiencing with the Skilled Worker Certificate of Sponsorship Journey have also been resolved.

Assignment of Journeys

Following the launch of the Journeys app, the option to "allocate checklists" via older screens, like Person Management, has now been removed to help streamline the process and reduce errors.

Most journeys are automatically assigned with the exception of the Skilled Worker Certificate of Sponsorship Journey, where needed this should be allocated via the Journeys App.

Job Offers – Expiry Notifications

Both offer team and candidate notifications will now be sent one day before the job offer expires, providing advance notice to allow timely action and reduce the risk of offers expiring. Prior to this update they were sent on the day of expiration.

Time Cards

The new features below will be available to Line Managers and SDAs via the Team Time Cards app:

- Addition of an Add icon (+) allows direct access to a new time card page. Currently users are re-directed to the Add Time Card search each time.
- Ability to add new line manager column.
- New option to export the Team Time Card list. Please ensure that any downloaded reports are stored in accordance with the University's Data Protection and Records Management guidance.

Absence

The issue that caused the system to calculate requested leave days incorrectly for employees with multiple assignments when requesting 'Partner Birth, 'Partner Adoption' or 'Surrogacy and Adoption' has been fixed.

Further Support and Guidance

Updates have been made to the relevant process and system user guides and are available on the People and Money user guides webpage.

If you have any questions, please contact the HR Helpline by raising a Service Request.

Finance, HR and Research Improvement Programme

Please keep up to date with our Finance, HR and Research Improvement programme on the dedicated SharePoint:

Finance, HR and Research Improvement Programme Info Hub

Finance

Payroll

December Payroll Cut Off Date for Schools and Departments

Following a review of the payroll cut off dates, the School/Department deadline to submit Employment Changes including Contract Requests, Joiners, Contract Changes and Leavers to HR for December payroll has been changed from Friday 28 November to **Tuesday 2 December**. All other December payroll cut off dates remain as previously communicated.

The school/department cut off dates timetable has been updated to reflect this change.

Job Advertising Deadlines

The job advertising deadlines prior to the Christmas closure have yet to be confirmed. They will be communicated as soon as they are available.

Training and Engagement

Finance Learning Communities

There are three Finance learning communities available in the People and Money Learning Catalog which you can 'bookmark' for easier access. The Finance communities are: Accounting, Financial Compliance and Payments.

Finance Development Hub

Our Finance Development Hub offers a wide range of training resources from hands-on training sessions to user guides to online video tutorials. You can access the Hub via the button below.

A range of finance development and training videos is also available from the Finance Development Channel.

If you have any ideas for future sessions, please get in touch with us by raising a call with the Finance Helpline at finance.helpline@ed.ac.uk

Finance Development Hub

New Expected Learning - Fraud Awareness

Further to the all staff email on 28 October, the University has launched a new Anti-Fraud Policy to streamline the process for reporting fraud.

Fraud Awareness Training

Employees should complete Fraud Awareness eLearning training every two years. This is now set as expected learning and all staff will be enrolled on the course in People and Money.

Access Fraud Awareness Training (University login required).

Sales Invoice Training

We're excited to announce the launch of a brand-new People and Money training course: FIN: Sales Invoice training — designed to equip staff with the essential skills and knowledge to request sales invoices confidently and accurately.

Course Details:

- **Title:** FIN: Sales Invoice training
- **Audience:** Staff who wish to request that a sales invoice be created.
- **Format:** Online via People and Money

- **Duration:** 1 hour

What You'll Learn:

- Understand the information required to complete a sales invoice request, including verifying the existence of pre-existing customer accounts.
- Learn how to create the service request on People and Money to request a new sales invoice.
- Have an understanding of the status of service requests, typical responses, and the actions that may be needed to resolve them.

Why Attend? Whether you're new to invoicing or looking to refresh your skills, this course will help you:

- Improve accuracy and reduce rework
- Enhance customer satisfaction through timely billing
- Support financial reporting and compliance

How to Register: Click FIN: Sales Invoice training to sign up or contact Finance.Development@ed.ac.uk for more information.

Let's build confidence and consistency in our invoicing practices — we look forward to seeing you there!

Create or Amend Customer Records Training

We're excited to announce the launch of another new People and Money training course: FIN: Create or amend customer records

In this course, you will learn how to create a Service Request to allow the creation of a new customer of the University or how to amend an existing customer record.

Course Details:

- **Title:** FIN: Create or amend customer records
- **Audience:** Staff who wish to request the addition or amendment of customers in People and Money, enabling the provision of Sales Invoices to these customers.
- **Format:** Online via People and Money
- **Duration:** 1 hour

What You'll Learn:

- Understand the information required to complete a new customer request, including checking pre-existing customer reports.
- Gain awareness of the implications of requesting a new customer, including a credit check and VAT.
- Learn how to create the service request on People and Money to request a new customer..

- Have an understanding of the status of service requests, typical responses, and the actions that may be needed to resolve them.

Why Attend? Whether you're new to dealing with university customers or looking to refresh your skills, this course will help you:

- Improve accuracy and reduce rework
- Enhance customer satisfaction through timely and accurate billing
- Support financial reporting and compliance

How to Register: Click FIN: Create or amend customer records to sign up or contact for more information.

User Guidance and Forms

Process and System User Guides

Our process and system user guides continue to be reviewed and updated as a result of user feedback, process changes and system updates. The guides can be accessed via the People and Money user guide webpage.

Finance Forms

We continue to make updates to the Finance Forms listed on the Finance Forms webpage. Please continue to download and use the latest versions from here.

Human Resources

Absence and Leave

Annual Leave Calculator

The Annual Leave Calculator for 2026 has been published and is available on the HR A-Z Forms webpage. We will be loading the Public Holidays and Christmas closure dates for 2026 in People and Money from 08 December and will communicate when this exercise is complete.

Learning Skills and Qualifications

New Demo Video

A new demo video titled **How to Record External Learning** is now available from People and Money Demo Videos webpage. In this short video it will explain how, as an employee, you can record external learning in People and Money. It also shares how a line manager can add external learning for one or more of their reports.

People and Money Update

Redwood - Absence Admin and Annual Reviews

From 13 October, as part of the Redwood project implementation, there are some visual changes to the People and Money system. These changes refresh the look and feel of some of the screens and bring them up to date with Oracle's most recent improvements.

You will see visual differences and some navigation changes in the below areas but there are no business process changes as a result.

- **Absence Admin** - for SDAs the **navigation has changed** to My Client Groups > Show More > Absences and Entitlements. All information contained in the screens remains the same.
- **Annual Reviews** - for employees and line managers there are slight changes in the Annual Review app **landing page** and the **steps** to record an annual review. For line managers, the **navigation has changed** to My Team > Show More > Talent > Annual Review Records.

To find out more about the changes, please see the **Redwood project monthly updates** document. The document contains all the information you need to know about the project, the most recent changes, and where you can access support, such as the revised user guidance.

Training and Engagement

Regular Training and Engagement Sessions

The HR Process Improvement team offers a calendar of regular and ad hoc learning and engagement sessions on HR processes and procedures, and the People and Money system. These sessions are aimed at different 'audiences', depending on the topic – all employees, Line Managers, School/Department Administrators (SDAs)/those with SDA access in the People and Money system, and others. The calendar will be published quarterly.

The schedule includes a monthly lunchtime learning session for SDAs/those with SDA access in the People and Money system. These sessions are also open to any line manager or HR colleague who might find them useful to attend.

To sign up

View the calendar of events in the Events section of the HR Process and Guidance Hub.

To listen to recordings

If you are unable to attend any session, we make the recordings of all sessions available afterwards in the Recent Sessions - Recordings & Slides section of the HR Process and Guidance Hub.

If you have any ideas for future sessions, please get in touch with us by raising a Service Request using the category 'Continuous Improvement'.

User Guidance and Forms

Process and System User Guides

Our process and system user guides continue to be reviewed and updated as a result of user feedback, process changes and system updates. The guides can be accessed via the People and Money user guide webpage.

HR Forms

We continue to make updates to the HR Forms listed on the HR A-Z webpage. **Please continue to download and use the latest versions from here.**

We have recently updated the following forms to bring these up to date with accessibility guidelines.

- Bank Account Request Form
- Exit Interview Form
- Flexible Working Request Form
- Grievance Appeal Form
- Grievance Form
- Individual Adjustments Plan
- People and Money Staff Protocol
- Request for additional qualification, licence or certificate
- Request to Advertise on Job train
- Return to work form
- SPL form 1
- SPL form 1A
- SPL form 3A
- SPL form 3B
- SPL form 4a
- SPL form 4b
- SPL form 5
- Work schedule change form (no hours change)

We have also made some improvements to the Scholarship Notification of Change Form and Scholarships/Studentships (Form 98) **These are now known as the Taxable Scholarships Form and Taxable Scholarships Change Form**.

If you have a suggestion to make for the HR Forms or User Guides, please raise a Service Request using the category 'Continuous Improvement'.