



System User Guide

How to Enter Contact Details into the 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

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Introduction

This guide covers key tasks for **Employees** in **'How to Enter Contact Details into the System'** system process.

This guide covers how to add or update your:

- Phone Number
- Email Address
- Home Address
- Emergency Contact's Details

The University holds and processes personal data about individuals such as employees, students, graduates and others, defined as 'data subjects' by the law. Such data must only be processed in accordance with the UK General Data Protection Regulations (UK GDPR) and the Data Protection Act (DPA). For further information please see the [Data Protection webpages](#).

Before you begin, make sure you know...

1. There is currently no connection between the People and Money system and the University's telephone/website directories online so if you update your contact details on the system, these won't automatically get updated elsewhere. Please keep in mind to maintain all areas where this info is displayed and keep them up to date.
2. The system must always have a phone contact so if you wish to edit your existing phone number, first add a new one in and only then delete the old one. Otherwise, you won't be able to delete the existing number.

In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

Enter Your Contact Details

1. From the Home page, open the **Me** section, then click **Personal Information**.
2. Select **Contact Info**.
3. In the **Phone details** section, click the **+Add button** or the **pencil icon** to edit your information.
4. Click **Save**.
5. In the **Email Details**, click the **+Add button** or the **pencil icon** to edit your information.
Note: Your work email will default to your University email address and you will be unable to edit this.
6. Click **Save**.
7. Go to the **Address section**, click the **+Add button** or the **pencil icon** to edit your information.
8. Click **Save**.

Enter Your Emergency Contact Details

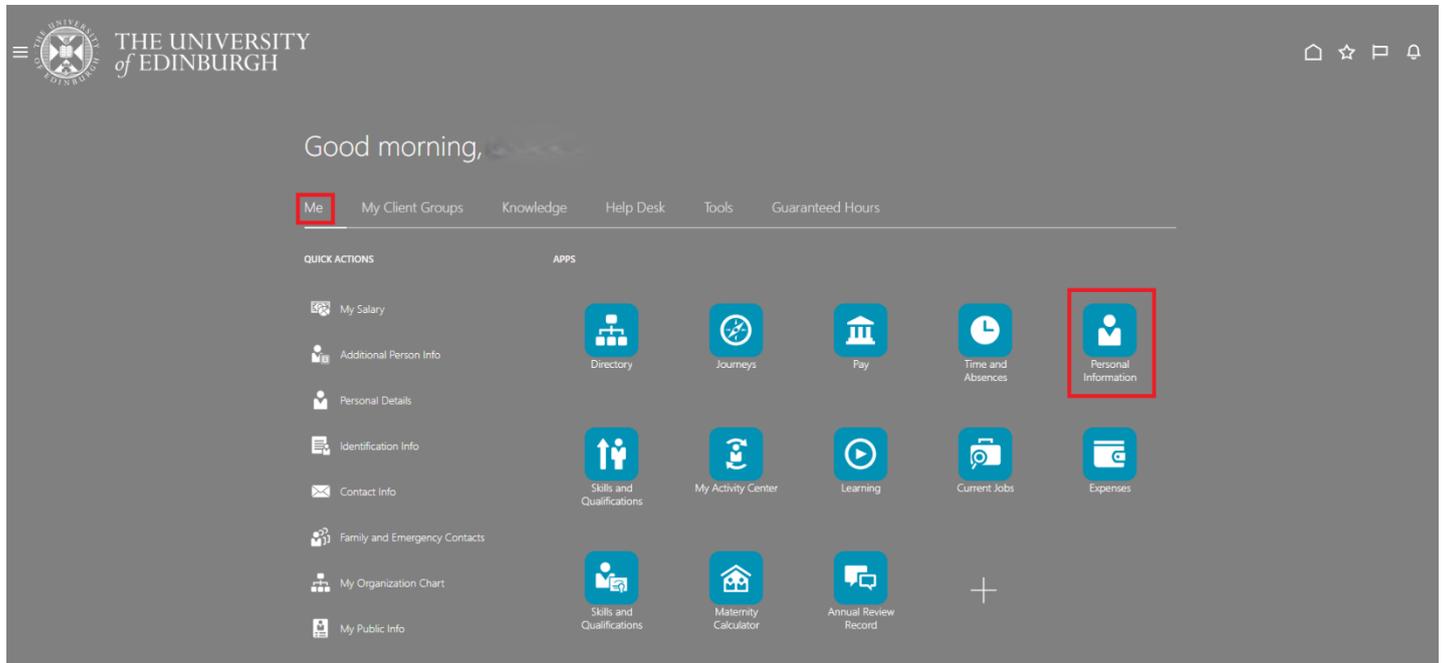
1. From the Home page open the **Me** section then click **Personal Information**.
2. Select **Family and Emergency Contacts**.
3. Click the **+Add button** to **Create a New Contact** or the **select the existing contact** to edit your information.
4. Fill out the **Basic Information, Phone Details, Email Details, Address** and add any **Comments and Attachments** for your chosen contact.
5. Click **Submit**.

In Detail

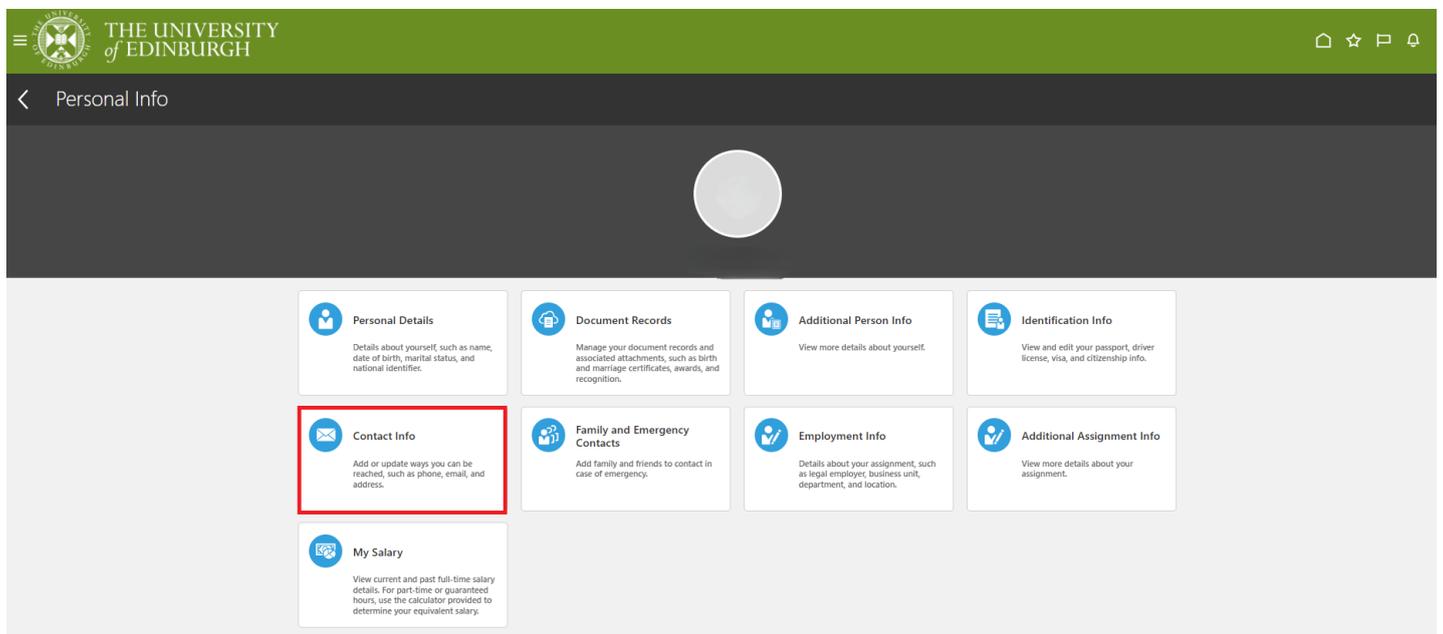
This section provides the detailed steps and includes relevant screenshots from the system.

Entering Your Contact Details

1. From the Home page, open the **Me** section, then click **Personal Information**.



2. Select **Contact Info**.



Phone Details

1. In the **Phone details** section click the **+Add button** or the **pencil icon** to edit your information.

Contact Info

Phone details

Type
Home Mobile Phone

Number

Primary

2. Enter the following details:

- a. **Country** is a dropdown option – Select as appropriate.
Note: this automatically defaults to United Kingdom 44.
- b. **Type** is a dropdown option – Select as appropriate.
- c. **Area Code** – as appropriate.
- d. **Number** – as appropriate.
- e. **Primary** - click on the toggle to select this as the main phone number.
- f. **Comments** – as appropriate.
- g. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

Phone details

Country
United Kingdom 44

Type

Area Code

Number

Primary

Required

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

Notes:

- please ensure you add a work phone number and ensure that this is selected as the **Primary** number. If you do not have a work phone number please enter 0.
- If you add in a comment, ensure you click **Save Comment** before saving the changes.

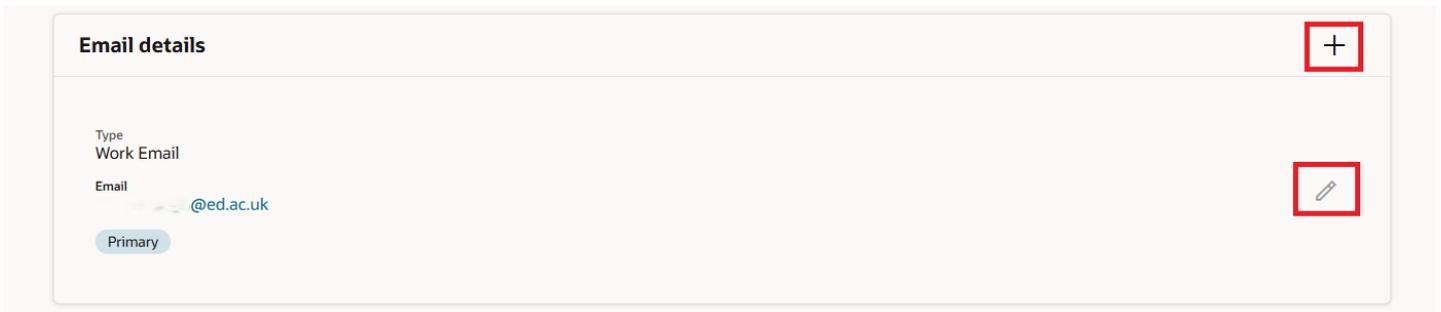
3. Click **Save**.

Note: The system must always have a phone contact so if you wish to edit your existing phone number, first add a new one in and only then delete the old one. Otherwise, you won't be able to delete the existing number.

Email Details

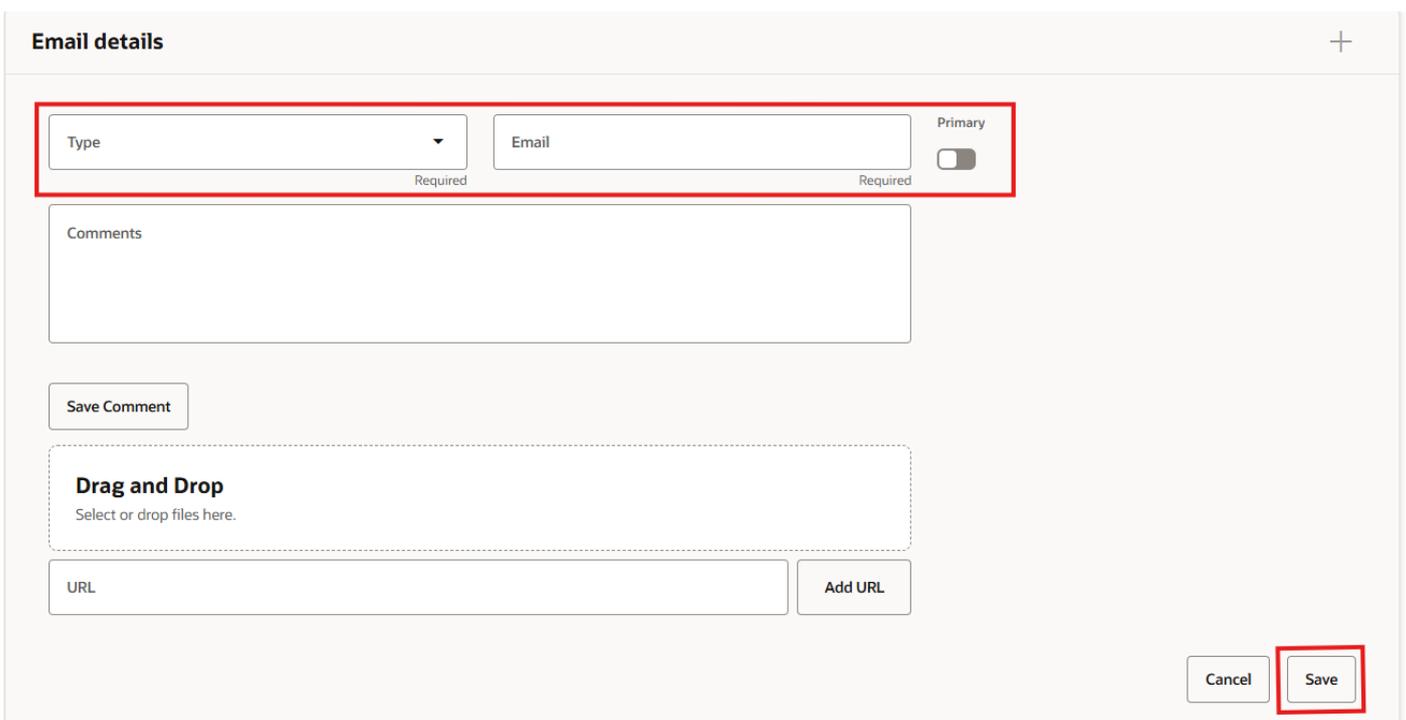
1. In the **Email details** section click the **+Add button** or the **pencil icon** to edit your information.

Note: Your work email will default to your University email address and you will be unable to edit this.



2. Enter the following details:

- a. **Type** is a dropdown option – Select as appropriate.
- b. **Email** – as appropriate.
- c. **Primary** - click on the toggle to select this as the main Email.
- d. **Comments** – as appropriate.
- e. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

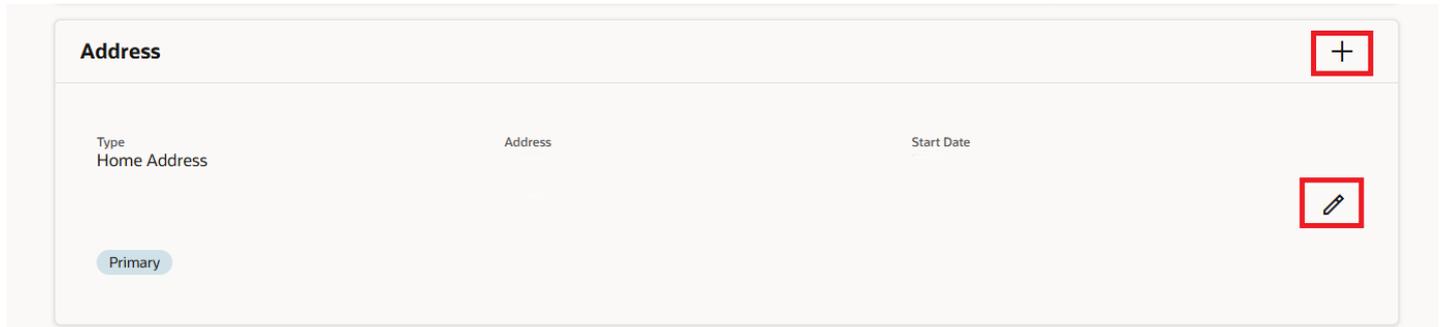


Tip:

- If you add in a comment, ensure you click **Save Comment** before saving the changes.
4. Click **Save**.

Address

1. In the **Address** section click the **+Add button** or the **pencil icon** to edit your information



Note: If you are updating your address to a new address in the same country use the **pencil icon** to edit the address. If you are adding an additional address or have an overseas address internationally, add a new address using the **+Add button** and set this as your primary address.

2. Enter the details as below:
- a. **Country** is a dropdown option – Select as appropriate.
Note: this automatically defaults to United Kingdom.
 - b. **Type** is a dropdown option – Select as appropriate.
 - c. **Start Date** – as appropriate.
 - d. **Address Line 1** – as appropriate.
 - e. **Address Line 2** – as appropriate.
 - f. **Address Line 3** – as appropriate.
 - g. **City or Town** – as appropriate.
 - h. **County** – as appropriate.
 - i. **Postcode** – as appropriate.
 - j. **Primary** – click on the toggle to select this as the main Address.
 - k. **Comments** – as appropriate.
 - l. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

Address +

Country
United Kingdom

Type
Required

Start Date
16/02/2026

Address Line 1
Required

Address Line 2

Address Line 3

City or Town
Required

County

Postcode

Primary

Comments

Save Comment

Drag and Drop
Select or drop files here.

URL Add URL

Cancel Save

Notes:

- As some fields are free-text, ensure you use the correct spelling.
- If you are **correcting** a mistake in your address, please ensure the **Start date** matches the previous dated change.
- If you add in a comment, ensure you click **Save Comment** before saving the changes.

3. Click **Save**.

Primary

Comments

Save Comment

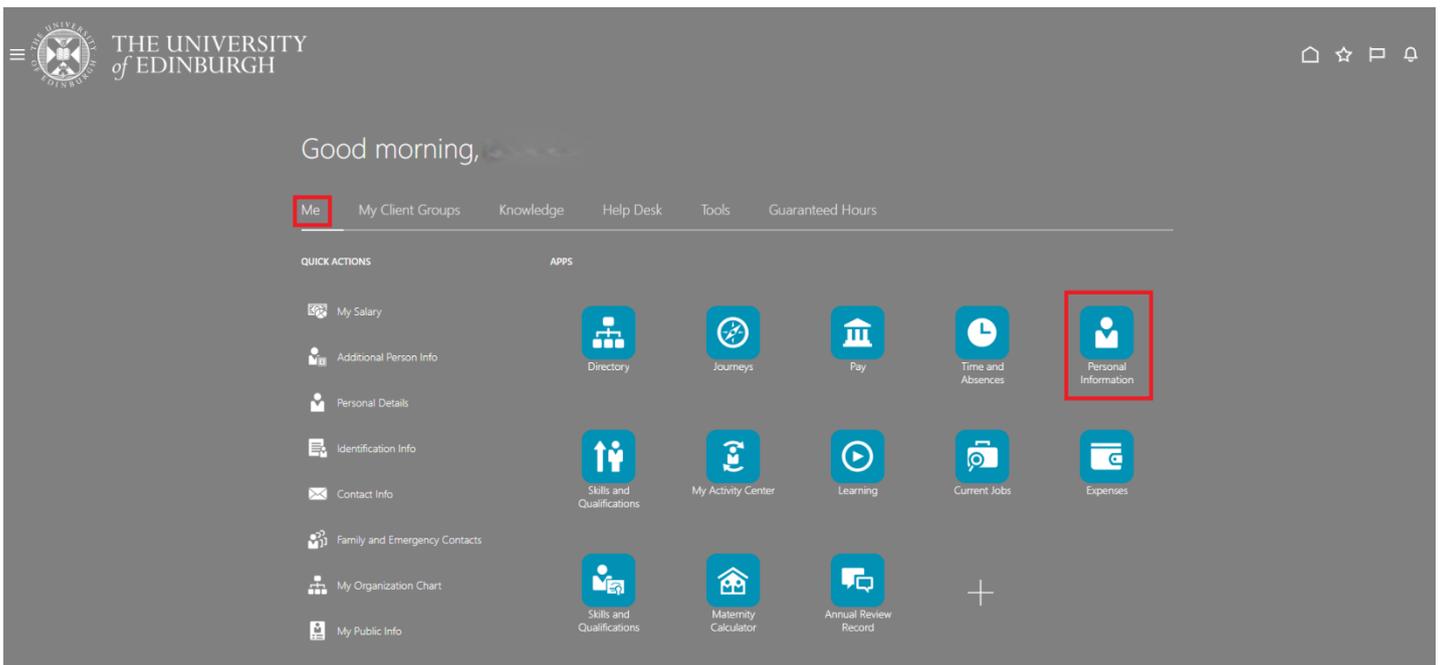
Drag and Drop
Select or drop files here.

URL Add URL

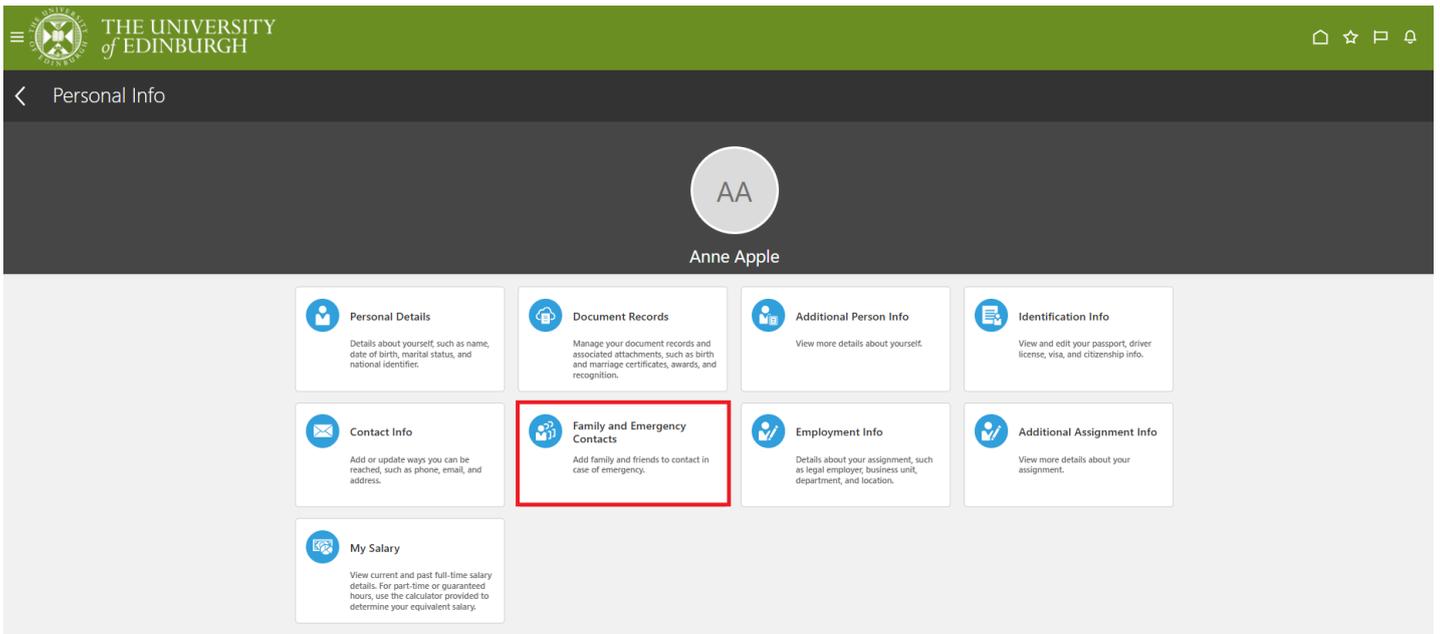
Cancel Save

Entering Your Emergency Contact Details

1. From the Home page, open the **Me** section, then click **Personal Information**.



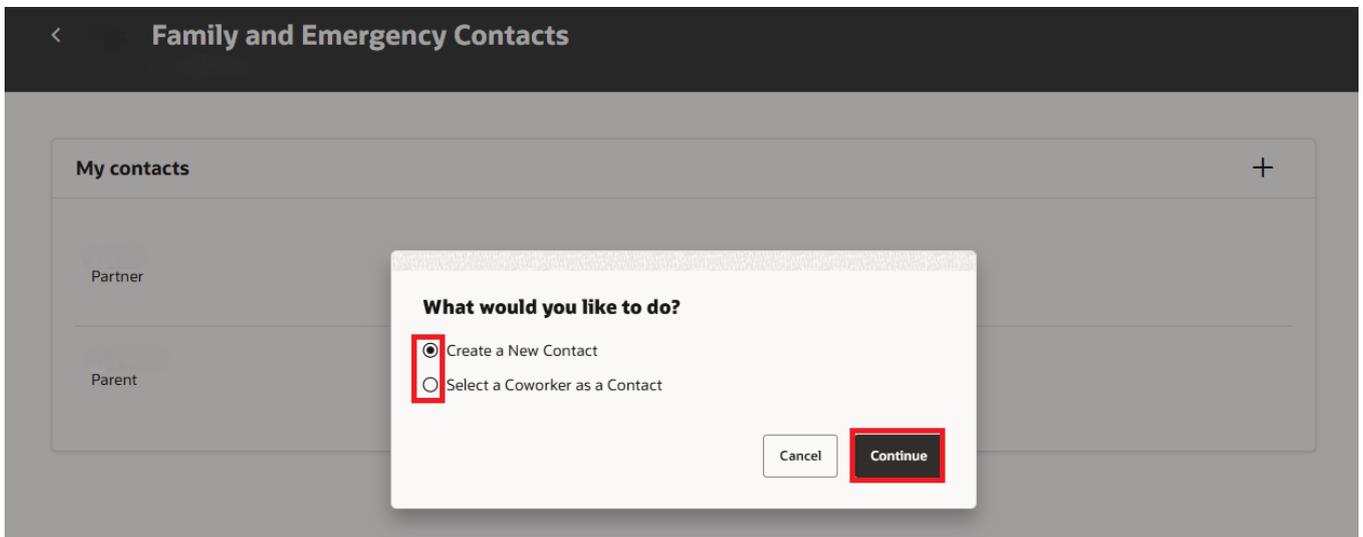
2. Click **Family and Emergency Contacts**.



3. Click the **+Add button** or **select the existing contact** to edit your information.



Via **+Add button**, select **Create New Contact** or **Select a Coworker as a Contact**. Then click **Continue**.



4. Fill out the **Basic Info, Phone details, Email details, Address** and add any **Comments and Attachments** for your chosen contact.

New Contact

Cancel Submit

Basic info

Global Name

Title <small>Required</small>	First Name <small>Required</small>	Preferred Name <small>Required</small>
Middle Name	Last Name <small>Required</small>	

Relationship

Relationship <small>Required</small>	What's the start date of this relationship? <small>Required</small>	This person is an emergency contact <input type="checkbox"/>
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Phone details

Country

Email details

Type

Address

Use My Address Enter a New Address

Select a value

Notes:

- If you are **correcting** any mistakes in your emergency contact's address or personal details, please ensure the **Start date** matches the previous dated change.
- If you add in a comment, ensure you click **Save Comment** before saving the changes.

Comments

Save Comment

Drag and Drop
Select or drop files here.

URL Add URL

5. Click **Submit**.

New Contact

Basic info

Global Name

Required

Required

Required

Required

Relationship

Required

Required

This person is an emergency contact

Phone details

Email details

Address

Use My Address
 Enter a New Address

Version History

Version	Date	Description	Approved By
1.0	04 August 2025	<ul style="list-style-type: none"> Transferred guide to new template Replaced all screenshots to reflect the new look of the Redwood screens 	M Easton 01/08/25
1.1	23 February 2026	<ul style="list-style-type: none"> Updated for 26A – added tip for comments and attachments 	RM/HH 17/02/2026

Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.