



System User Guide

Employee Guide – How to Search, View and Upload Document Records

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

Contents

Introduction	2
In Brief.....	3
Searching for and Viewing a Document	3
Uploading a New Document.....	3
Editing a Document.....	3
In Detail.....	4
Searching for and Viewing a Document	4
Uploading a New Document.....	7
Editing a Document.....	11
Appendix.....	14
Appendix A – Documents available to view or upload for Employees.....	14
Version History	15
Reviewers & Approvers	15

Introduction

This guide covers key tasks for Employees in how to search, view and upload documents in Document Records in People and Money. It is related to the Process User Guide for Employee Files which is linked below.

[Guide to Employee Files](#)

All employees should familiarise themselves with the Guide to Employee Files linked above. New Employees – As part of your onboarding tasks and joining experience you will be asked to upload certain documents to the People & Money System, for example your signed contract of employment.

Please note, some of your documents are stored in Document Records in People & Money, others are stored in the Employee File SharePoint. Find out where your documents are stored in the [Guide to Employee Files](#).

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](#).

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.

Searching for and Viewing a Document

1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.
2. To view documents within **Document Records**, click on the document name (blue text).
 - a. A pop up screen will appear on the right hand side.
 - b. To **Download** or **Preview** any of the attachments, click on the **ellipsis icon**.
3. Click on the cross at the top right hand corner to exit the pop up screen.

Uploading a New Document

1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.
2. Click on the name of the document (blue text) to view it in detail.
3. To upload a new document, click on the **Add** button at the top of the page.
4. In the **New Document Record** page, click in the **Document Type** field and select the applicable document from the list, e.g. 'Drivers License'.
5. Complete the fields with the relevant details.
6. To upload a document, click on **Drag and Drop field** in the **Attachments** section.
7. Navigate to the location where the document is stored and select it. The document will appear below the **Drag and Drop** field. To add multiple attachments, repeat steps 6 and 7 for each file.
8. Click **Submit** and the **Document Records** page opens with details of the uploaded document type.
9. To upload a different document type, click the **Add** button and repeat steps 4 to 8.

Editing a Document

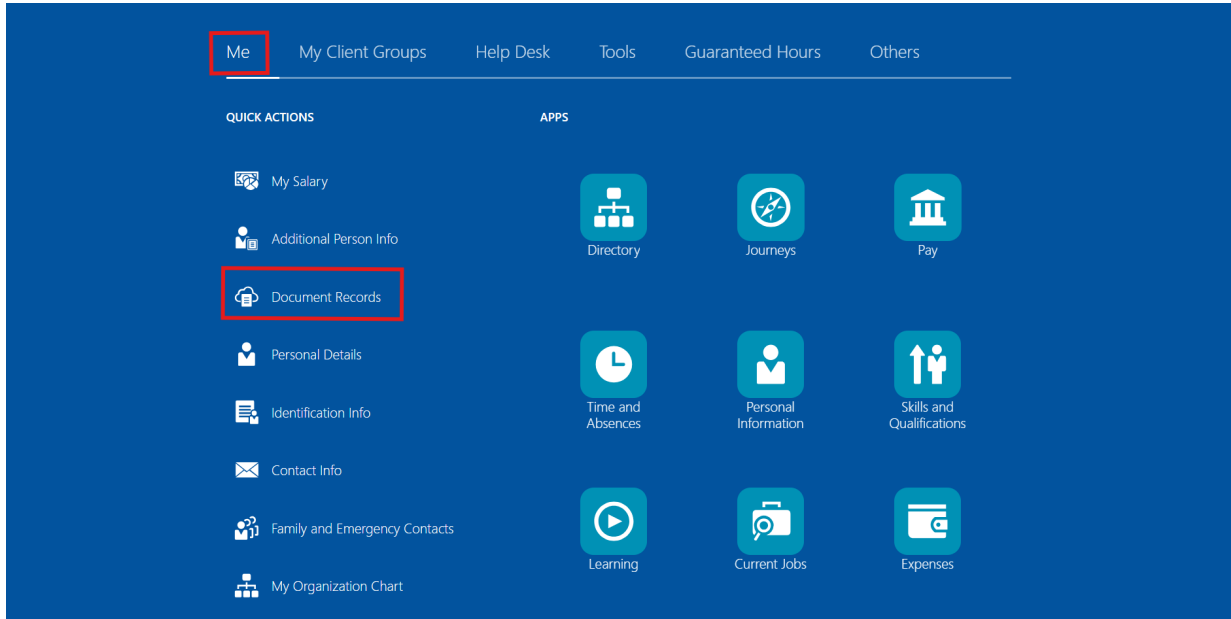
1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.
2. Click on the document name (blue text).
3. The editable fields will be shown in white. Amend as required and press **Save**.
 - a. If you wish to delete the document type all together, you can do so by clicking on the **Delete** button (next to the **Save** button).
 - b. If you want to amend the **Attachments** section, scroll down until you see the **Drag and Drop** field. You can add more attachments by clicking on the **Drag and Drop** field. Alternatively, if you would like to remove existing attachments, you can do so by clicking on the **ellipsis icon** and selecting **Remove**.

In Detail

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

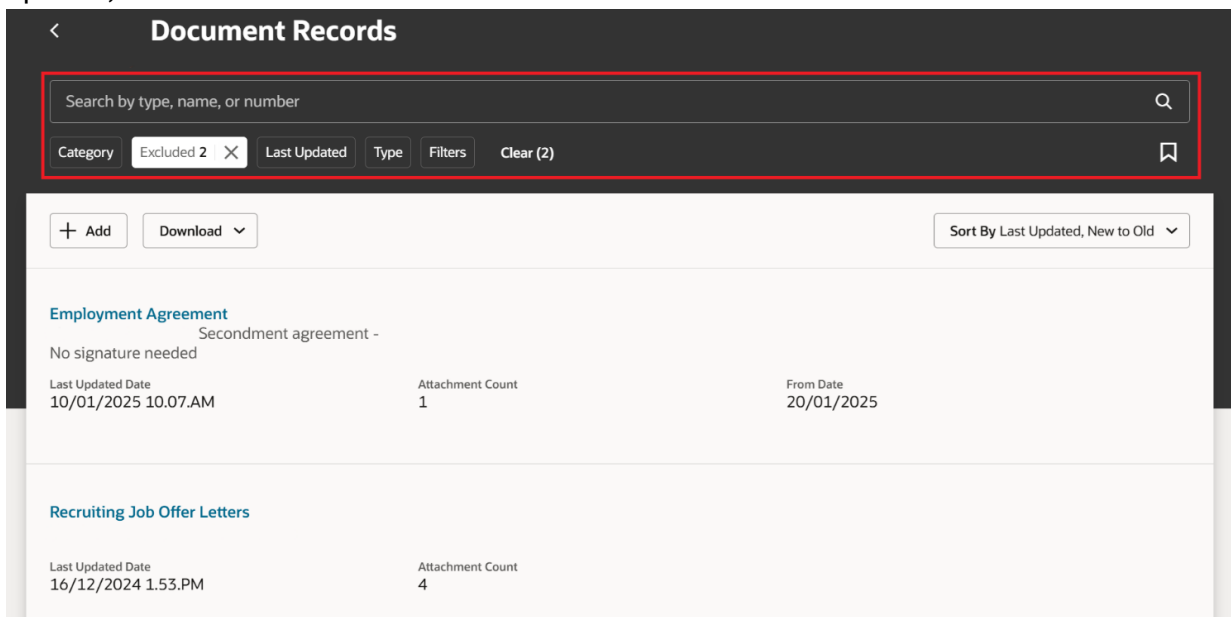
Searching for and Viewing a Document

1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.



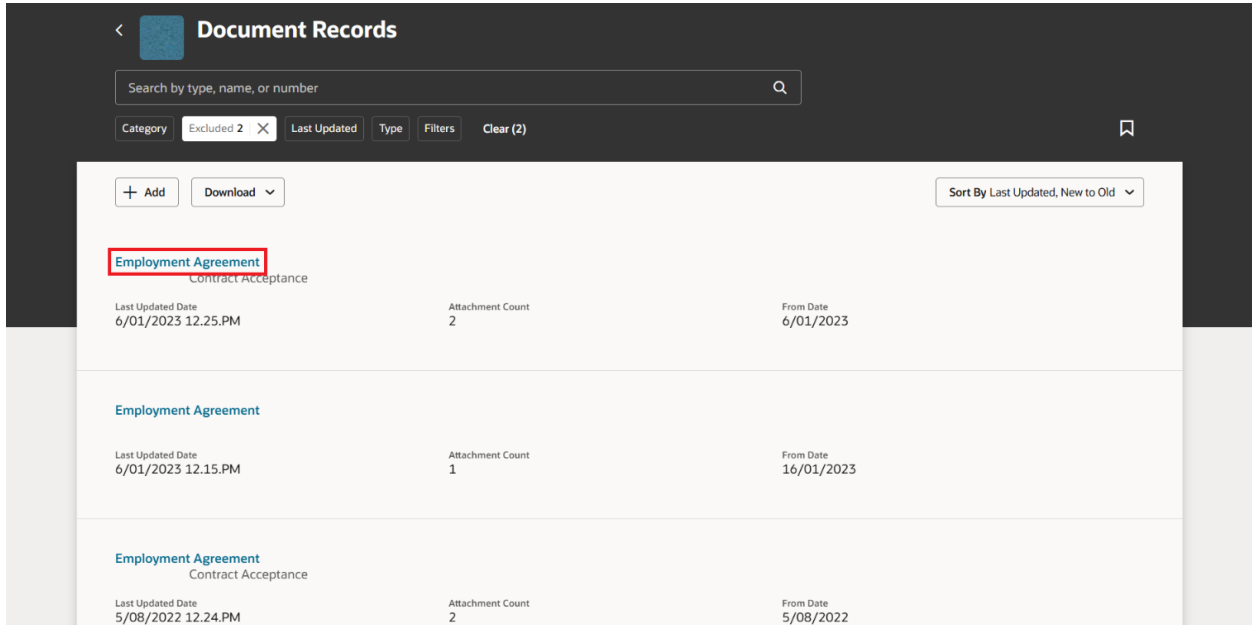
2. All the documents held against your record will be listed on the screen.

You can use the **search bar** at the top of the page to search for a specific document type. Alternatively, you can use the **filters** below the search bar to refine your search. To view more filter options, click on the '**Filters**' button below the search bar.

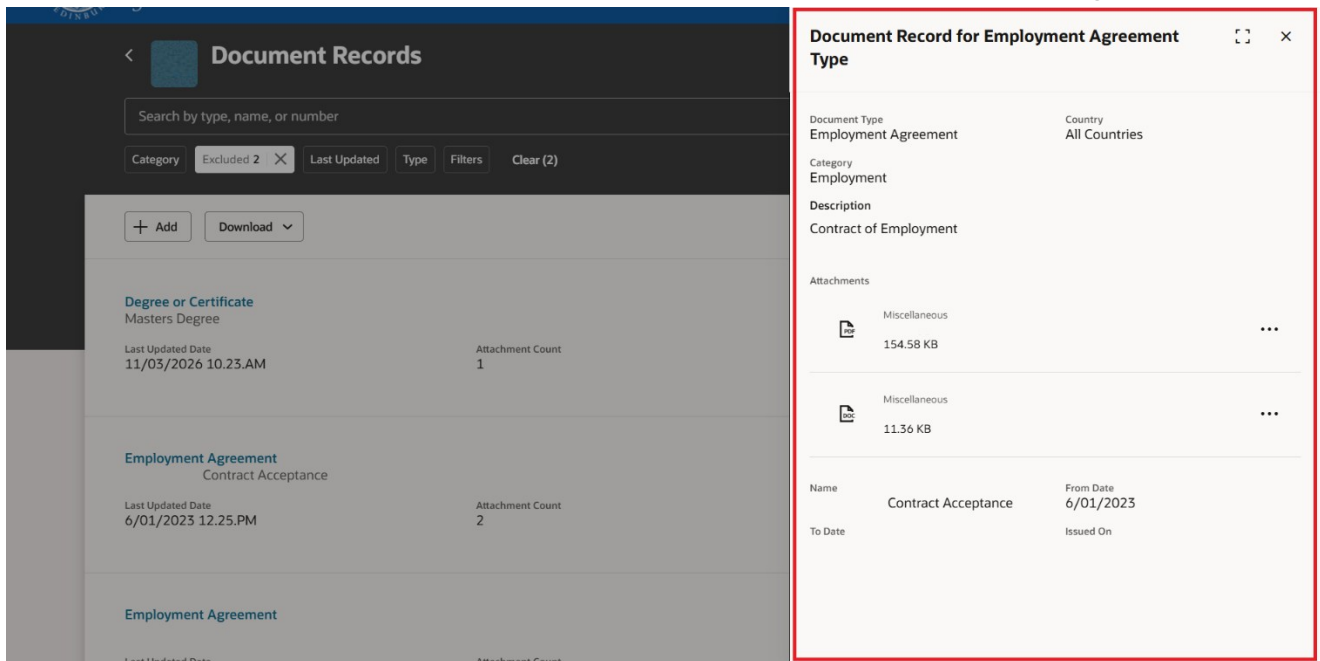


- To view a document within **Document Records**, click on the document name (blue text).

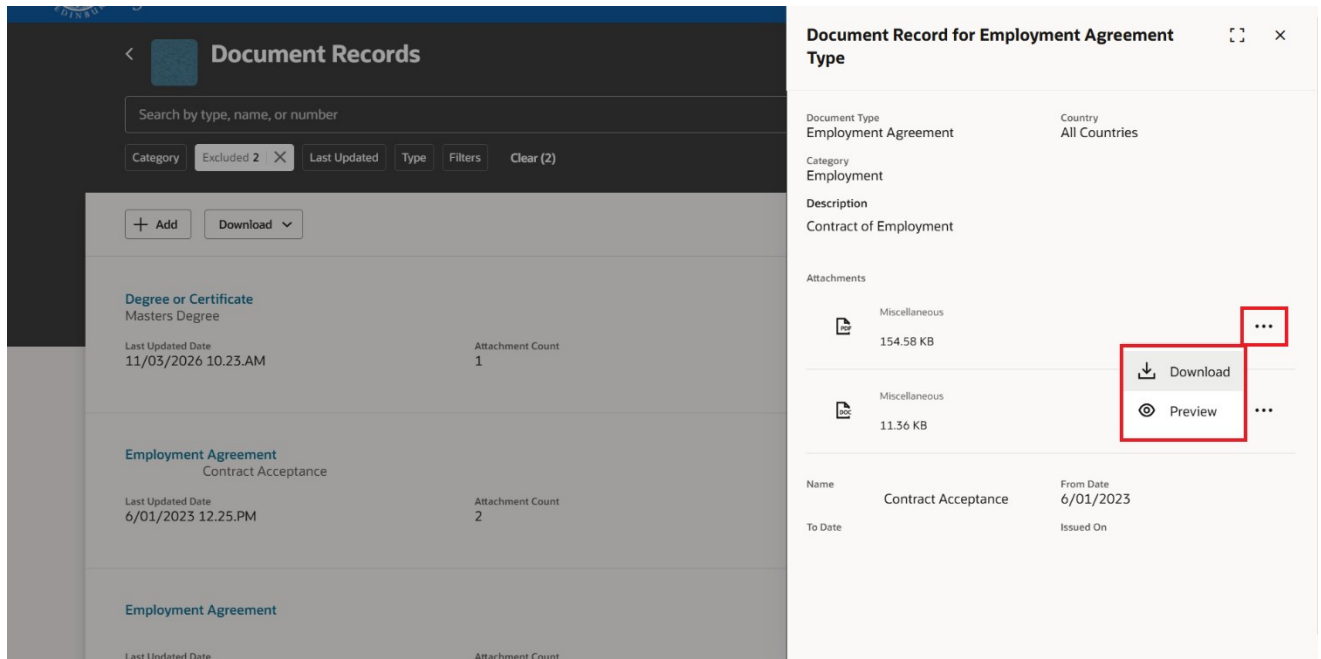
You can use the **search bar** at the top of the page to search for a specific document type. Alternatively, you can use the **filters** below the search bar to refine your search. To view more filter options, click on the **'Filters'** button below the search bar.



- Once you have selected a document to view, a pop up screen will appear on the right hand side.



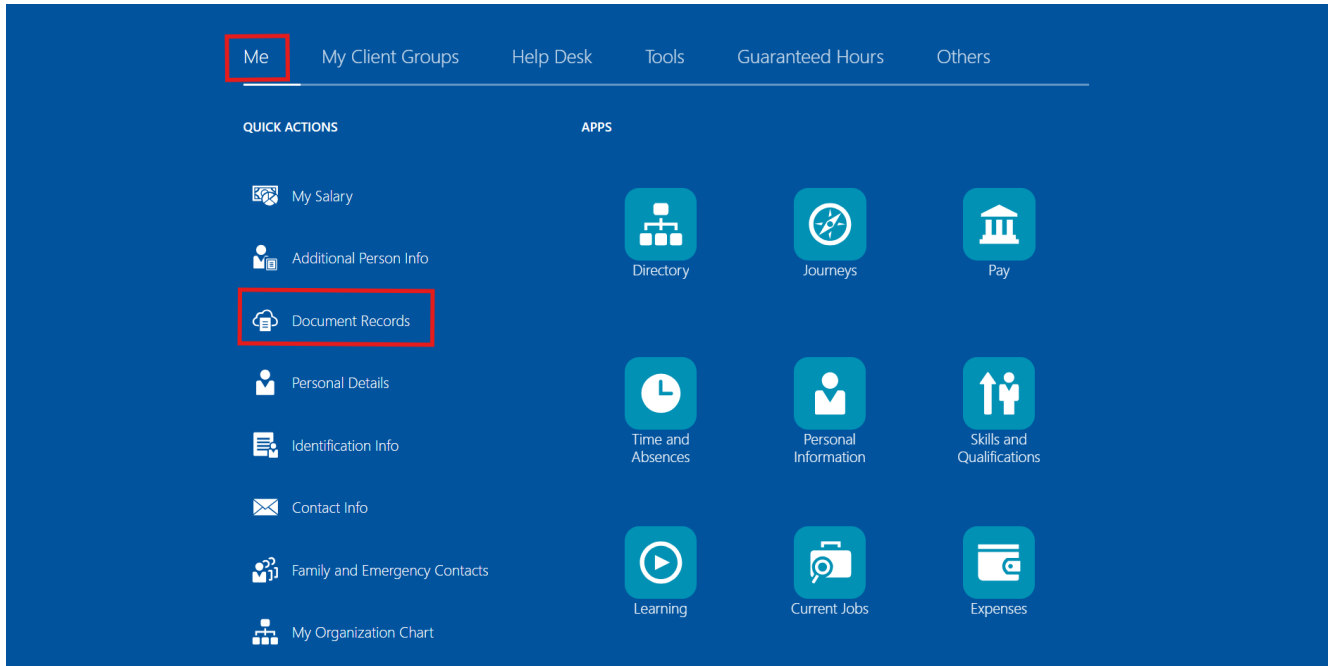
5. To **Download** or **Preview** any of the attachments, click on the **ellipsis icon**.



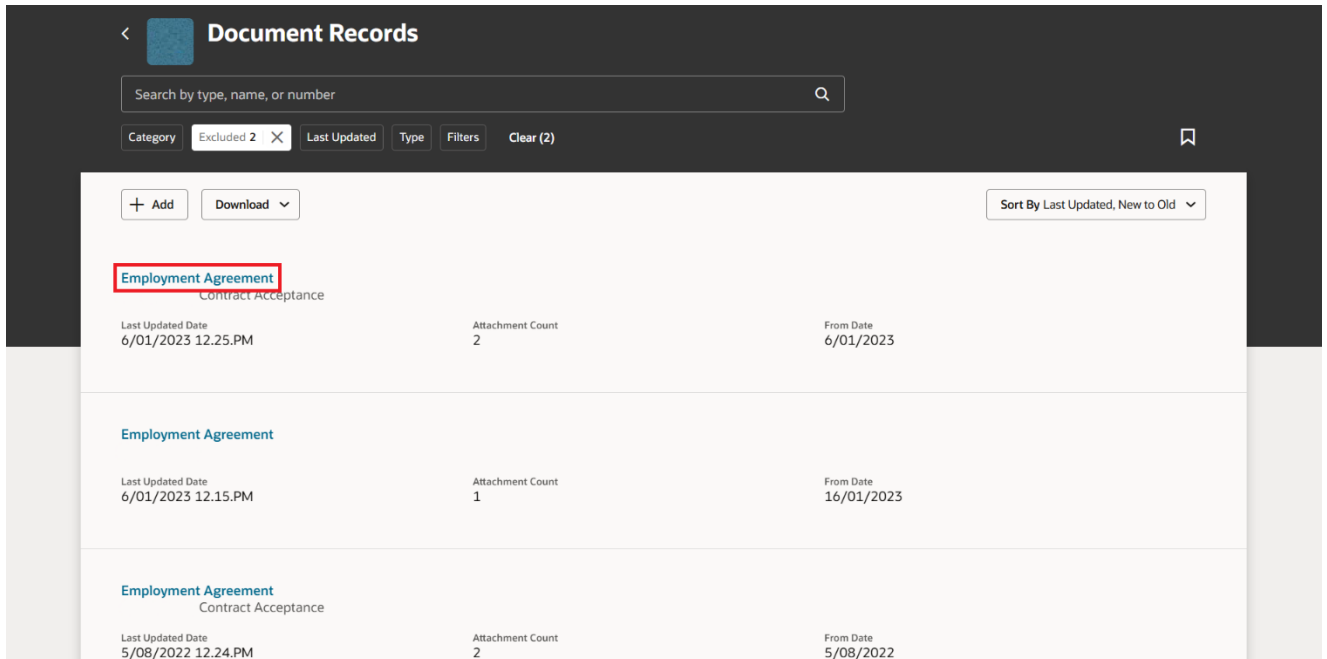
6. Click on the cross at the top right hand corner to exit the pop up screen.

Uploading a New Document

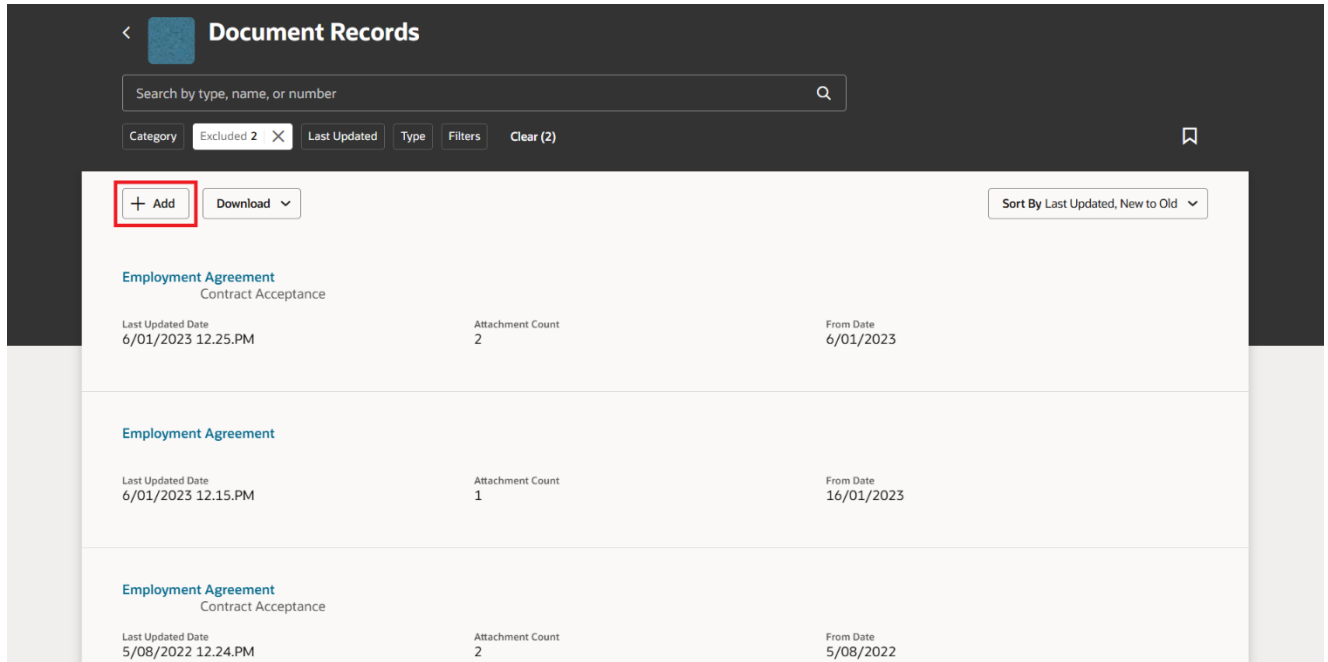
1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.



2. Click on the name of the document (blue text) to view it in detail.

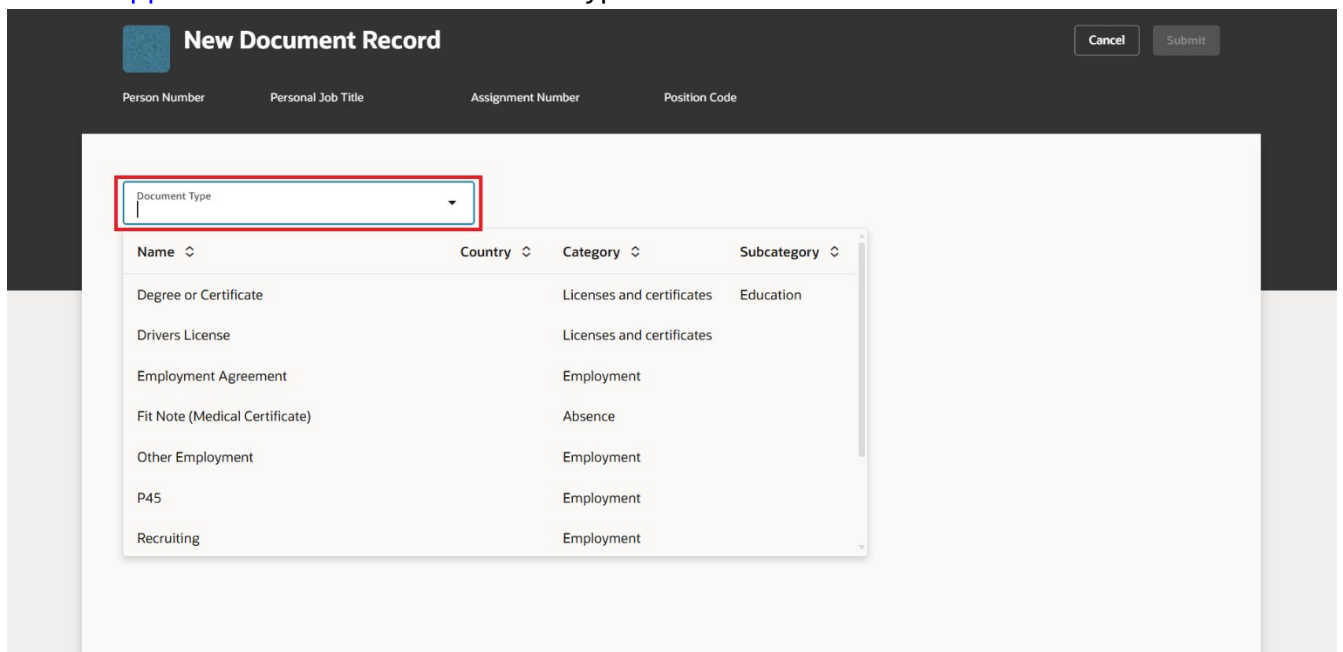


3. To upload a new document, click on the **Add** button at the top of the page.



4. In the **New Document Record** page, click in the **Document Type** field and select the applicable document from the list, e.g. 'Drivers License'.

See the [Appendix](#) for a list of all document types.



5. Complete the fields with the relevant details.

The screenshot shows a form with the following fields and values:

- Document Type: Drivers License
- Country: All Countries
- Category: Licenses and certificates
- Description: Driving licence
- Name: (empty)
- From Date: (empty)
- To Date: (empty)
- Issued On: (empty)
- Attachments: Drag and Drop (Select or drop files here.)

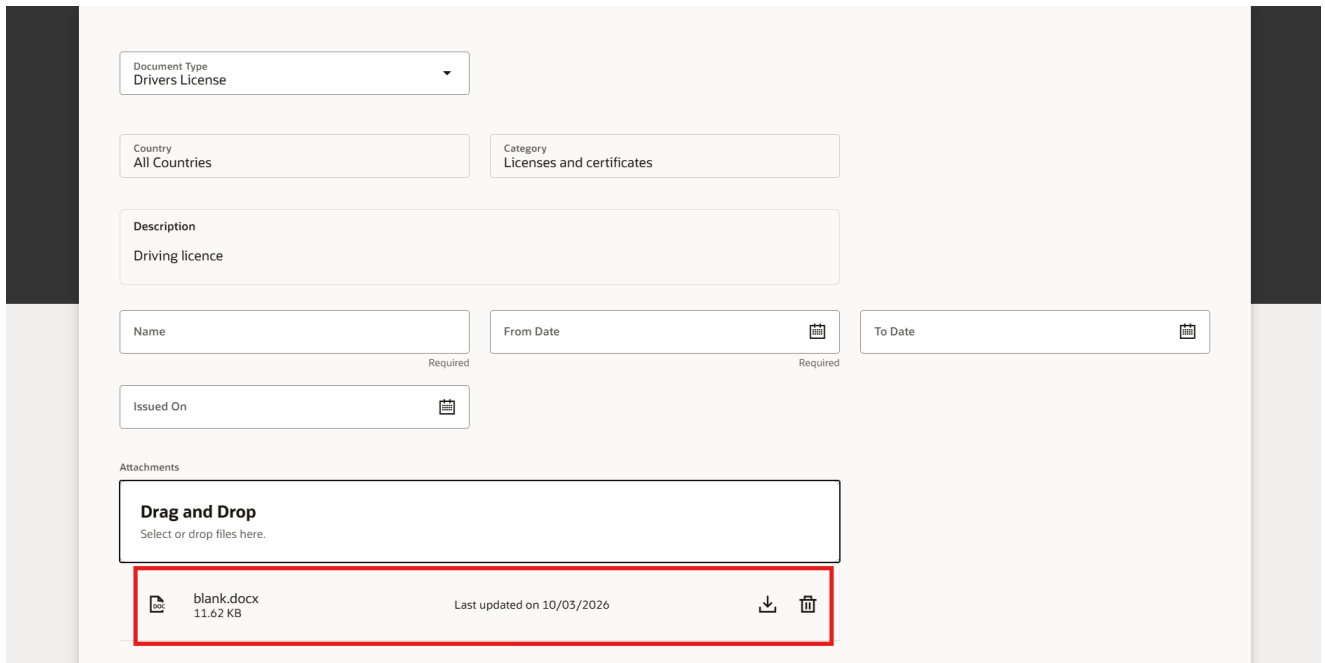
Note: the **Issued On** field does not appear for all document types.

6. To upload a document, click on **Drag and Drop field** in the **Attachments** section.

This screenshot is identical to the one above, but a red rectangular box highlights the "Drag and Drop" field in the "Attachments" section.

7. Navigate to the location where the document is stored and select it. The document will appear below the **Drag and Drop** field.

To add multiple attachments, repeat steps 6 and 7 for each file.

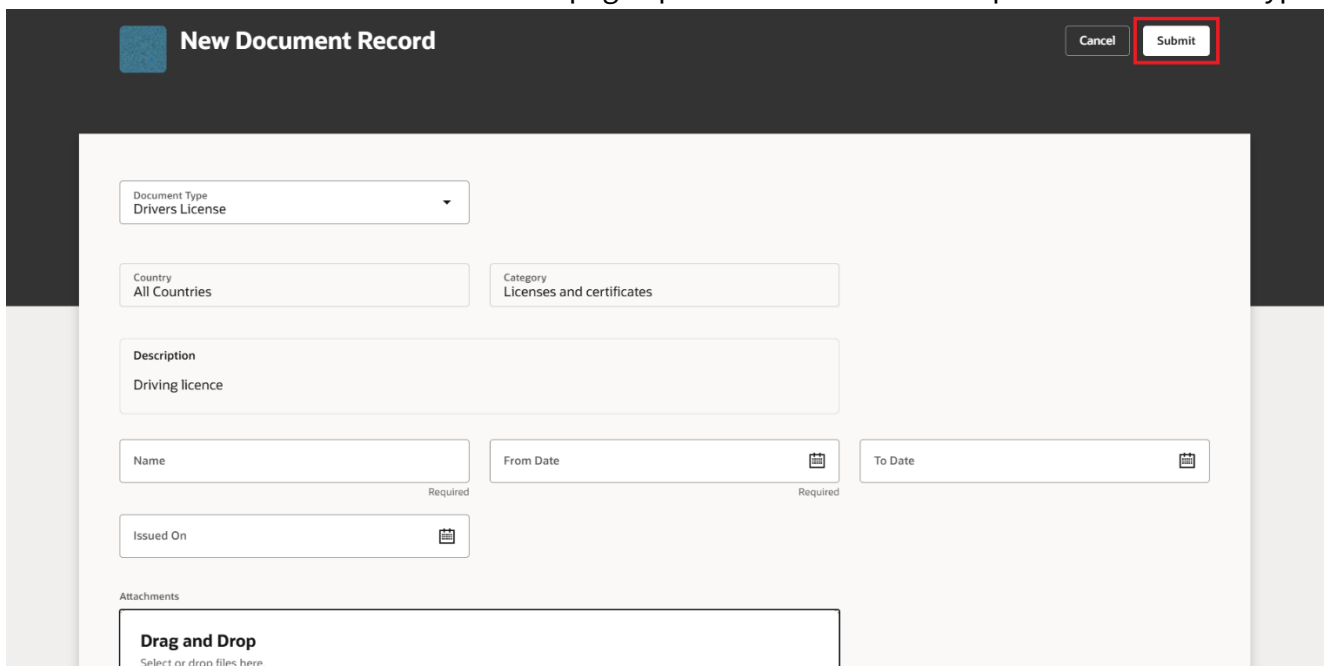


The screenshot shows a form for creating a document record. The form includes the following fields:

- Document Type:** A dropdown menu with "Drivers License" selected.
- Country:** A text input field with "All Countries" entered.
- Category:** A text input field with "Licenses and certificates" entered.
- Description:** A text input field with "Driving licence" entered.
- Name:** A text input field, marked as "Required".
- From Date:** A date picker field, marked as "Required".
- To Date:** A date picker field, marked as "Required".
- Issued On:** A date picker field.

Below the form is an **Attachments** section with a **Drag and Drop** area. A file named "blank.docx" (11.62 KB) is shown as attached, with a last updated date of 10/03/2026. The file name and size are highlighted with a red box.

8. Click **Submit** and the **Document Records** page opens with details of the uploaded document type.



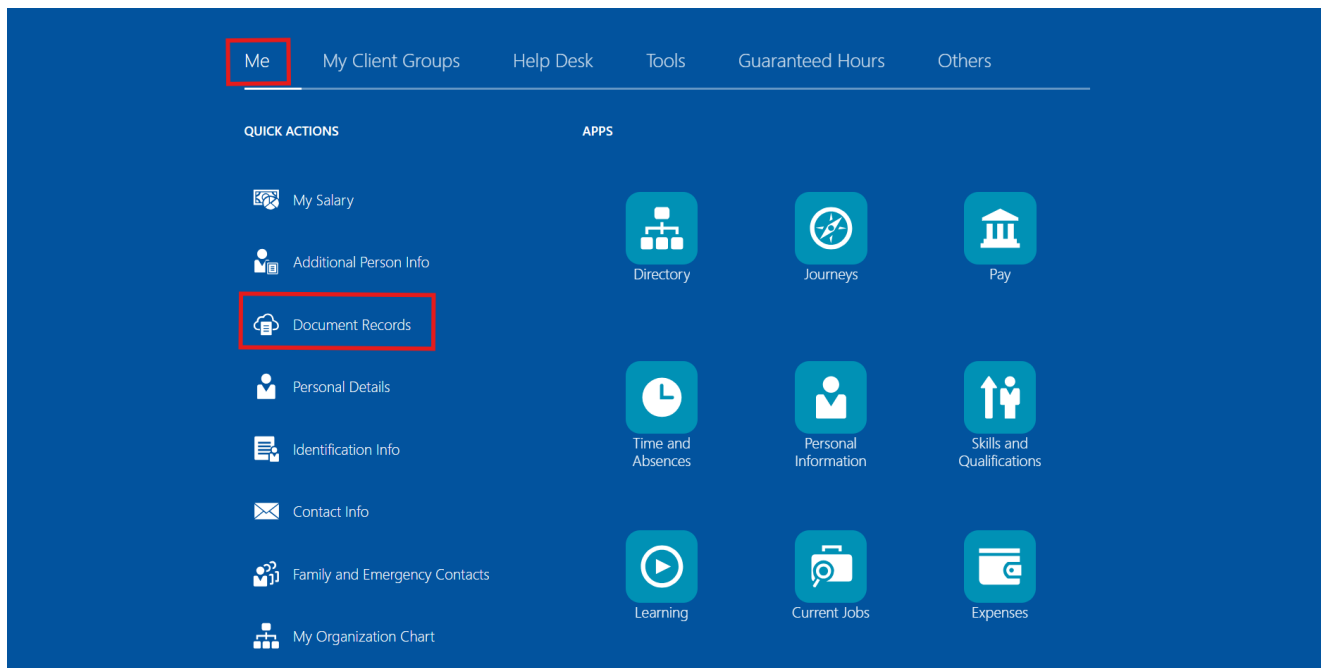
The screenshot shows the "New Document Record" page. The form fields are identical to the previous screenshot. In the top right corner, there are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted with a red box.

9. To upload a different document type, click the **Add** button and repeat steps 4 to 8.

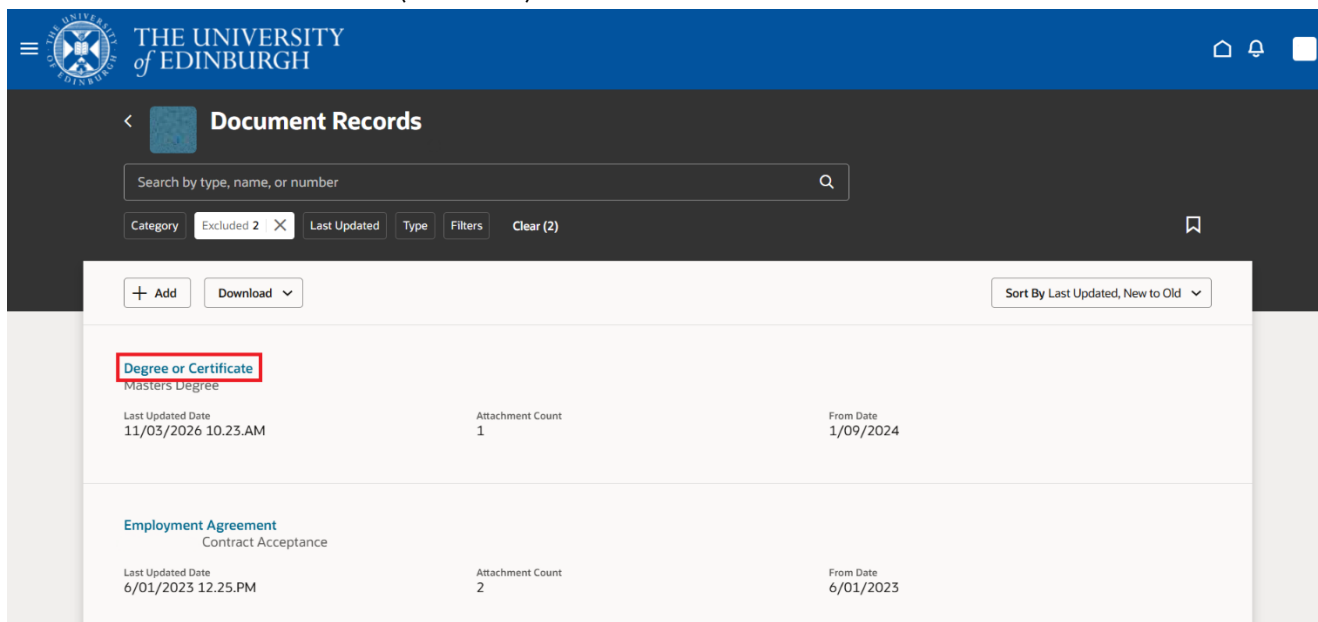
Editing a Document

Please note, the only document type that employees can edit is '**Degree or Certificate**'. If you need to edit any other document type, please raise a Service Request with HR Helpline.

1. From the **Home** page, click on the Me tab. Under the **Quick Actions** menu, click on **Document Records**.

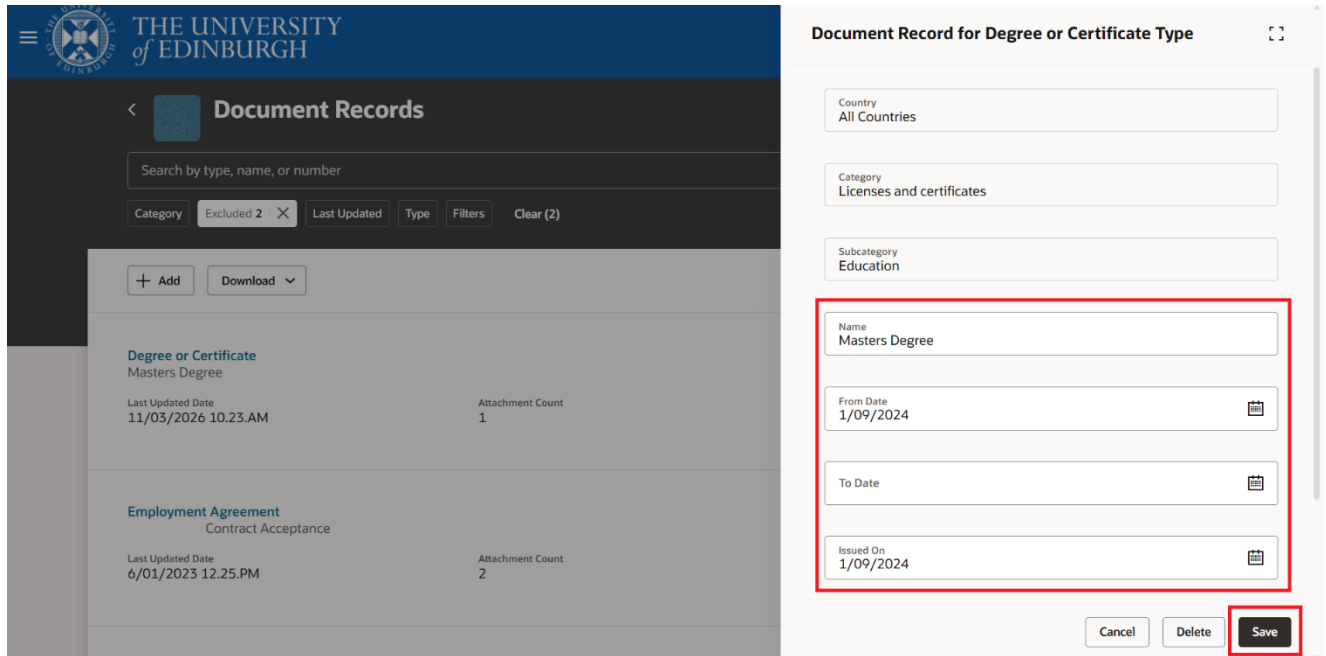


2. Click on the document name (blue text).

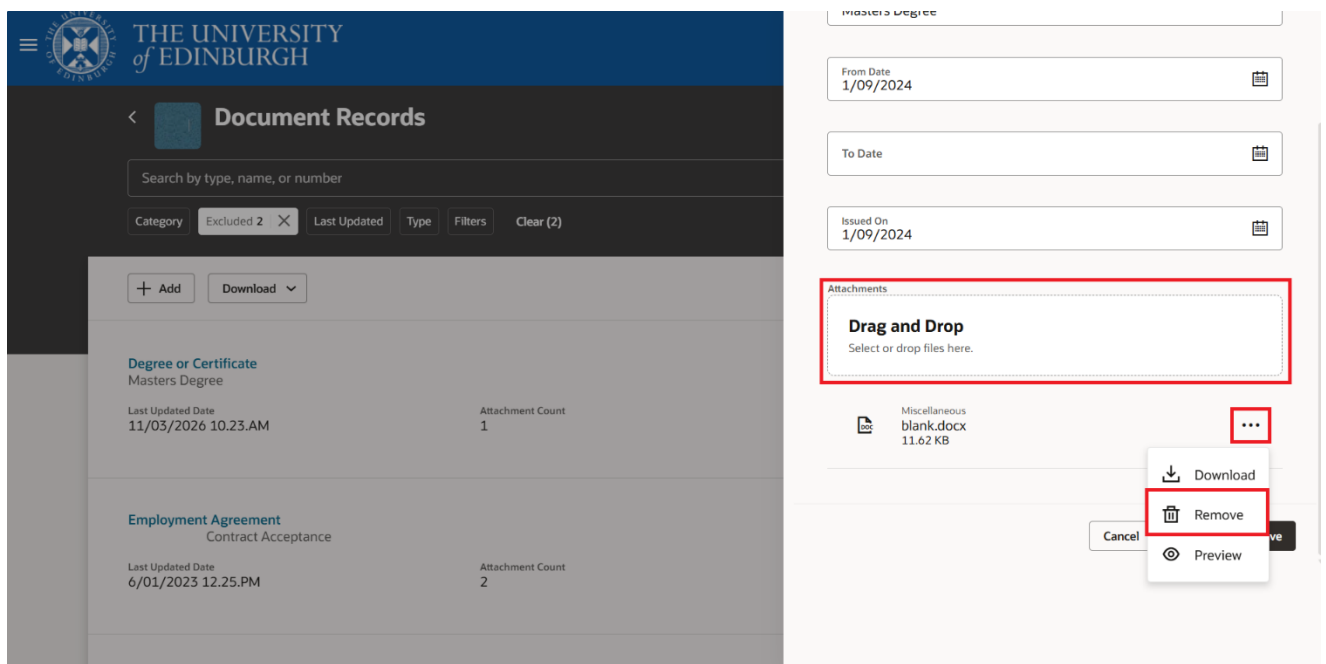


3. A pop up screen will appear on the right hand side of the screen. The editable fields will be shown in white.

If you wish to delete the document type all together, you can do so by clicking on the **Delete** button (next to the **Save** button).



4. If you want to amend the **Attachments** section, scroll down until you see the **Drag and Drop** field. You can add more attachments by clicking on the **Drag and Drop** field. Alternatively, if you would like to remove existing attachments, you can do so by clicking on the **ellipsis icon** and selecting **Remove**.



5. Once you have made all of the relevant changes, scroll to the bottom of the pop up screen and click on the **Save** button.

The screenshot displays the 'Document Records' interface for the University of Edinburgh. The left sidebar contains a search bar and filter options: 'Category' (set to 'Excluded 2'), 'Last Updated', 'Type', 'Filters', and 'Clear (2)'. Below the filters is a table of document records:

Document Type	Last Updated Date	Attachment Count
Degree or Certificate Masters Degree	11/03/2026 10.23.AM	1
Employment Agreement Contract Acceptance		

The right panel shows date filters: 'From Date' (1/09/2024), 'To Date', and 'Issued On' (1/09/2024). Below these is an 'Attachments' section with a 'Drag and Drop' area and a list of files, including 'Miscellaneous blank.docx' (11.62 KB). At the bottom right, there are three buttons: 'Cancel', 'Delete', and 'Save' (highlighted with a red box).

Appendix

Appendix A – Documents available to view or upload for Employees

There are a number of document types in Document Records that an employee can view, upload, download and amend as follows:

Document Type	Description	View	Add	Edit	Download	Delete
Degree or Certificate	Qualification	✓	✓	✓	✓	✓
Drivers licence	Driving licence	✓	✓	✗	✓	✗
Employment agreement	Contract of Employment	✓	✓	✗	✓	✗
Fit Note (Medical Certificate)	Medical Certificate	✓	✓	✗	✓	✗
P45	A document confirming previous employment, tax and national insurance information	✓	✓	✗	✓	✗
Recruiting	Recruiting	✓	✗	✗	✓	✗
Recruiting Job Offer Letters	Job Offer	✓	✓	✗	✓	✗
Relocation - Repayment terms - Visa Loan terms	Repayment terms - Visa Loan terms	✓	✓	✗	✓	✗
The document types below are no longer available to select when adding a new document, however, existing documents under these categories are still visible for historic purposes.						
Application	Application	View Only				
Other Employment	Other Employment	View Only				
Relocation – Repayment terms – Partner career transition	Repayment terms – Partner career transition repayment agreement	View Only				

repayment agreement		
Relocation – Repayment terms – Relocation repayment agreement	Repayment terms – Relocation repayment agreement	View Only
Resignation Letter	Resignation Letter	View Only

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	N/A
1.0	13 April 2026	<ul style="list-style-type: none"> Converted guide to new format. Replaced screenshots to reflect Redwood changes in People and Money. 	SK

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.