



# THE UNIVERSITY *of* EDINBURGH

## System User Guide

# School or Department Administrator Guide – How to Search, View and Upload Employee Documents

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

## Contents

Introduction .....	2
In Brief.....	3
Searching for and Viewing a Document in an Employee’s Document Records .....	3
Uploading a New Documents to an Employee’s Document Records .....	3
Editing an Employee’s Document in Document Records.....	3
In Detail.....	5
Searching for and Viewing a Document in an Employee’s Document Records .....	5
Uploading Documents to an Employee’s Document Records .....	8
Editing an Employee’s Document in Document Records.....	12
Appendix.....	15
Version History .....	16
Reviewers & Approvers .....	16

## Introduction

This guide covers key tasks for School or Department Administrators in the viewing, searching and uploading employee documents system process. It is related to the Process User Guide for Employee Files which is linked below.

### [Guide to Employee Files](#)

All SDAs should familiarise themselves with the Guide to Employee Files. A School/Department Administrator (SDA) can only add/upload selected file types. For more details, please see the [Appendix](#).

#### **Please note:**

- Do not remove any documents that have previously been added to an employee's record.
- Some document records are stored in Document Records in People & Money, others are stored in the Employee File SharePoint. Find out where 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 in an Employee's Document Records

1. From the **Home** page, click on the **My Client Groups** tab. Under the **Quick Actions** menu, select **Document Records**.
2. You can search for the employee by typing their Name, Assignment Number or Person Number into the **Search Bar**. Alternatively, you can select the relevant employee from the list below the search bar. You can use the filters below the search bar to refine your search.
3. All the documents held against the employee's record will be listed on the screen.
4. To view a document within Document Records, click on the document name (blue text).
5. Once you have selected a document to view, a pop up screen will appear on the right hand side.
6. To **Download** or **Preview** any of the attachments, click on the **ellipsis icon**.
7. Click on the cross at the top right hand corner to exit the pop up screen.

### Uploading a New Documents to an Employee's Document Records

1. From the **Home** page, click on the **My Client Groups** tab. Under the **Quick Actions** menu, select **Document Records**.
2. Type the employee's Name or Person Number in the **Search bar** and click on their name to continue.
3. To upload documentation for the employee, click on the **Add** button.
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 name will appear below the **Drag and Drop** field. To add multiple attachments, repeat steps 6 and 7 for each file.
8. Click **Submit** at the top of the page.
9. To upload another document for the employee, click the **Add** button and repeat steps 4 to 8.

### Editing an Employee's Document in Document Records

1. From the Home page, click on **My Client Groups**. Then, click on **Document Records** from the **Quick Actions** menu.
2. Type the employee's Name or Person Number in the **Search bar** and click on their name to continue. You can use **filters** below the Search bar to refine your search.

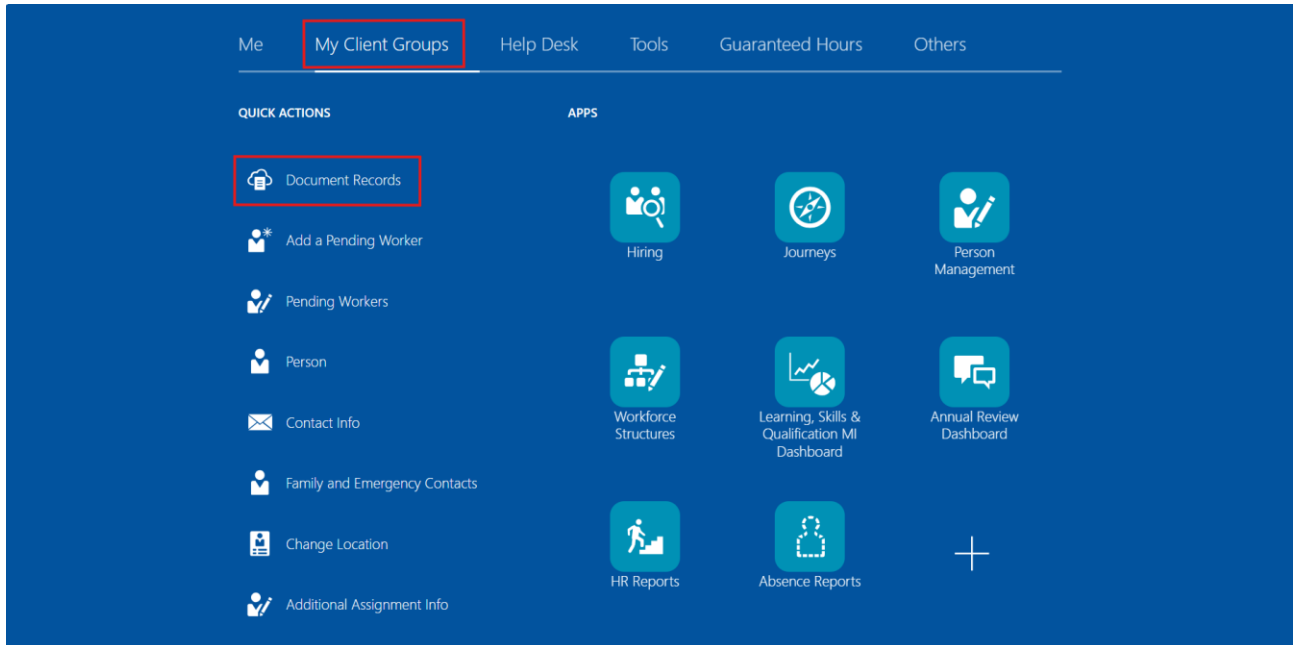
3. All the documents held against this employee's record should be listed on the screen. Click on the document you want to edit.
4. A pop up screen will appear on the right hand side of the screen. The editable fields will be shown in white.
  - a. If you want to amend the **Attachments** section, scroll 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. 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).
6. Once you have made the relevant amendments, scroll to the bottom of the pop up screen and click on the **Save** button.

## In Detail

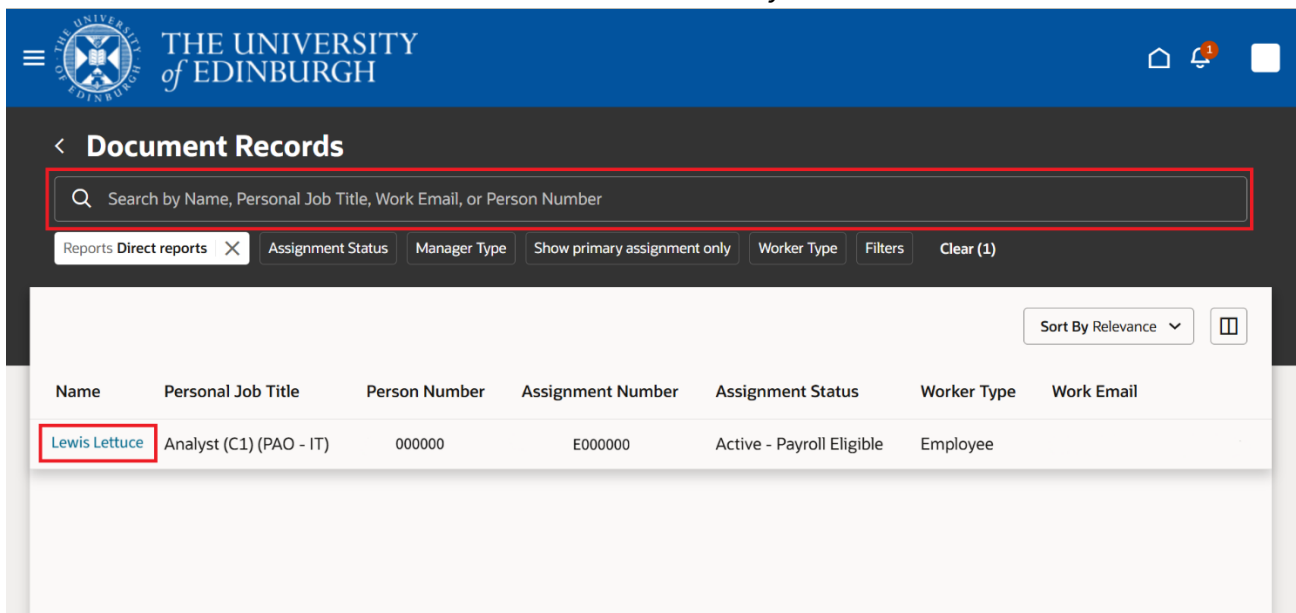
This section provides the detailed steps and includes relevant screenshots from the system.

### Searching for and Viewing a Document in an Employee's Document Records

1. From the **Home** page, click on the **My Client Groups** tab. Under the **Quick Actions** menu, select **Document Records**.

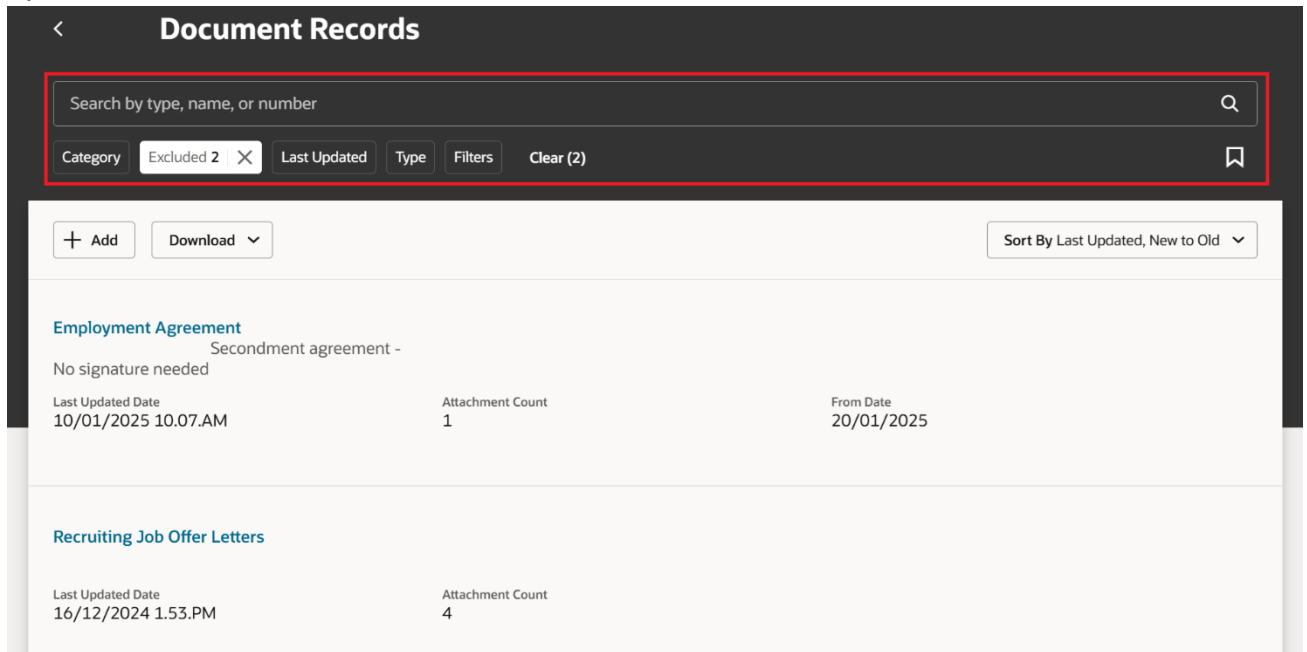


2. You can search for the employee by typing their Name, Assignment Number or Person Number into the **Search Bar**. Alternatively, you can select the relevant employee from the list below the search bar. You can use the filters below the search bar to refine your search.

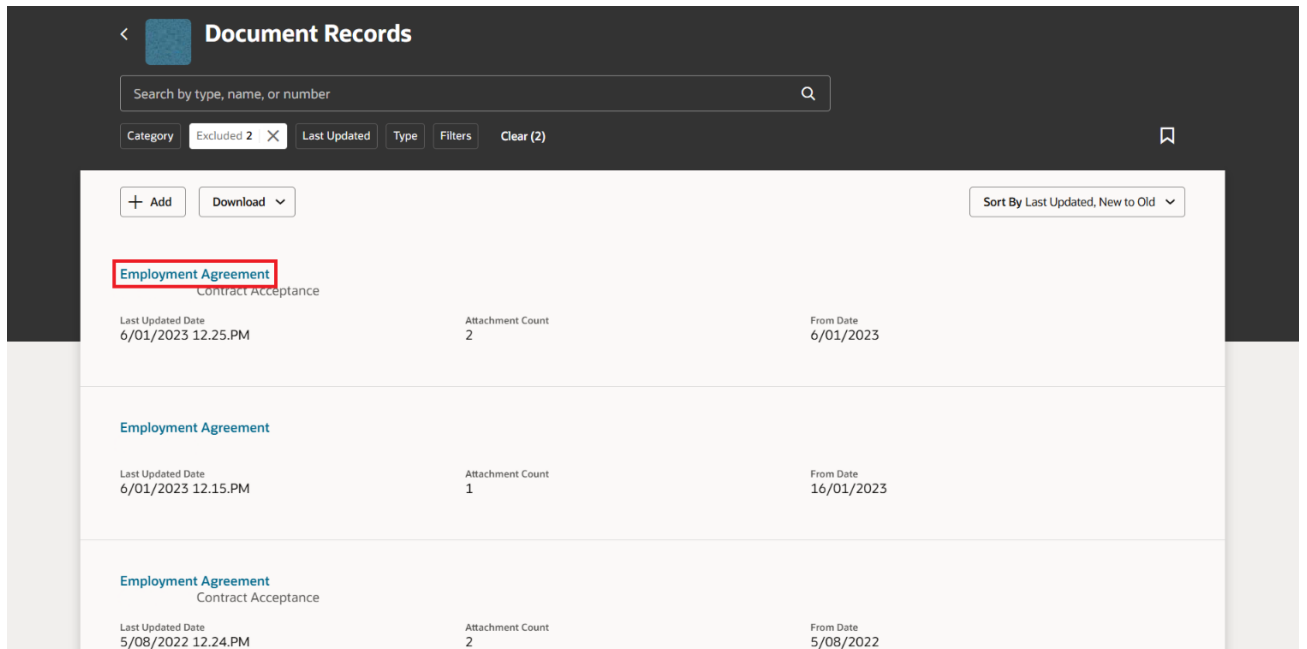


3. All the documents held against the employee’s record will be listed on the screen.

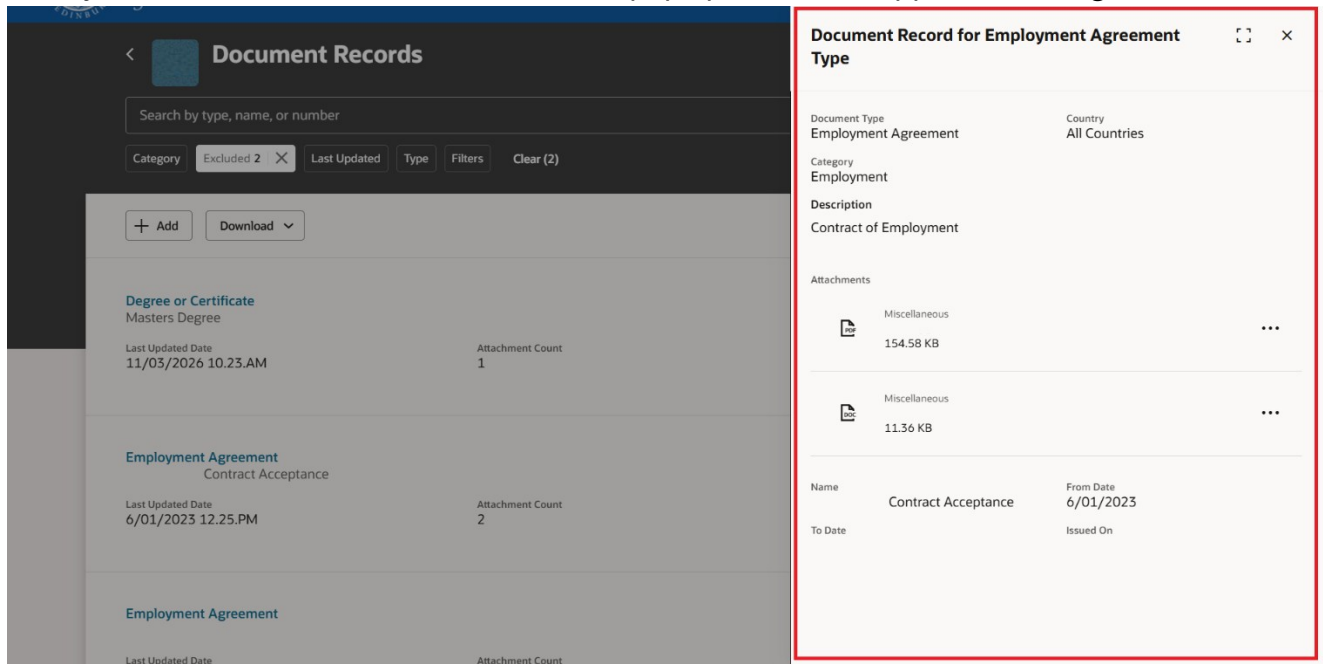
You can use the **search bar** at the top of the page to search for a specific document type. Alternatively, you can use the **filters** below the search bar to refine your search. To view more filter options, click on the **‘Filters’** button below the search bar.



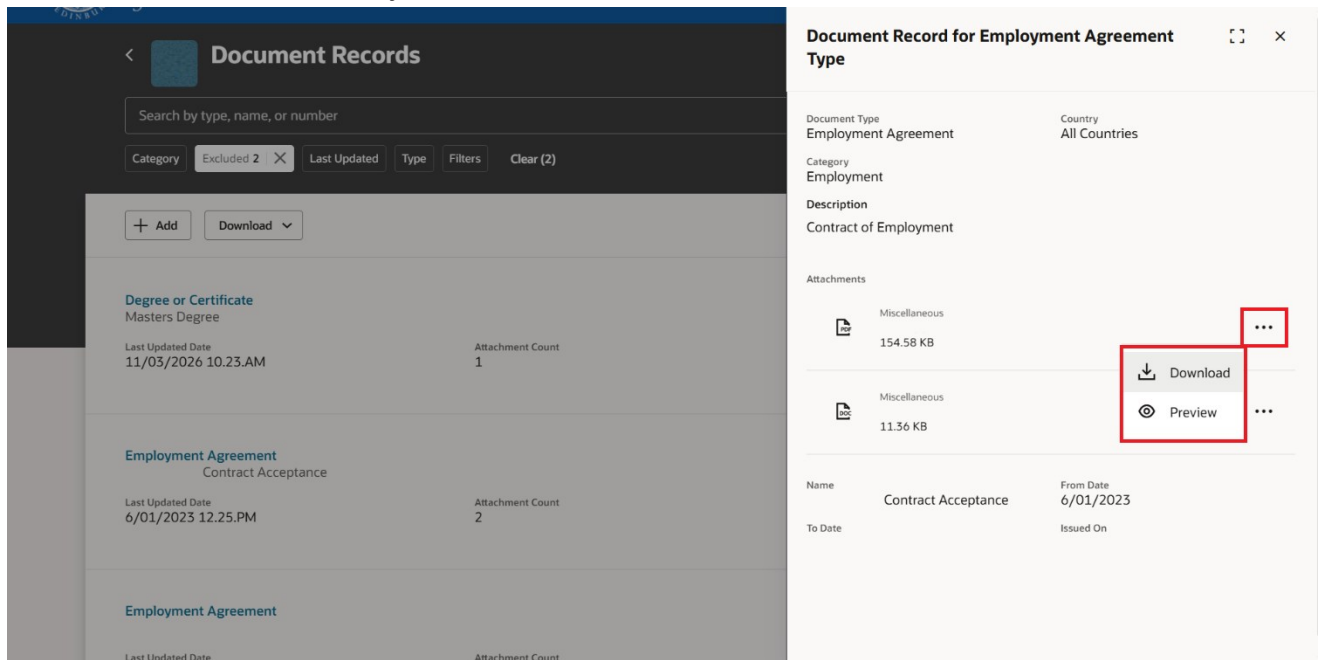
4. To view a document within Document Records, click on the document name (blue text).



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



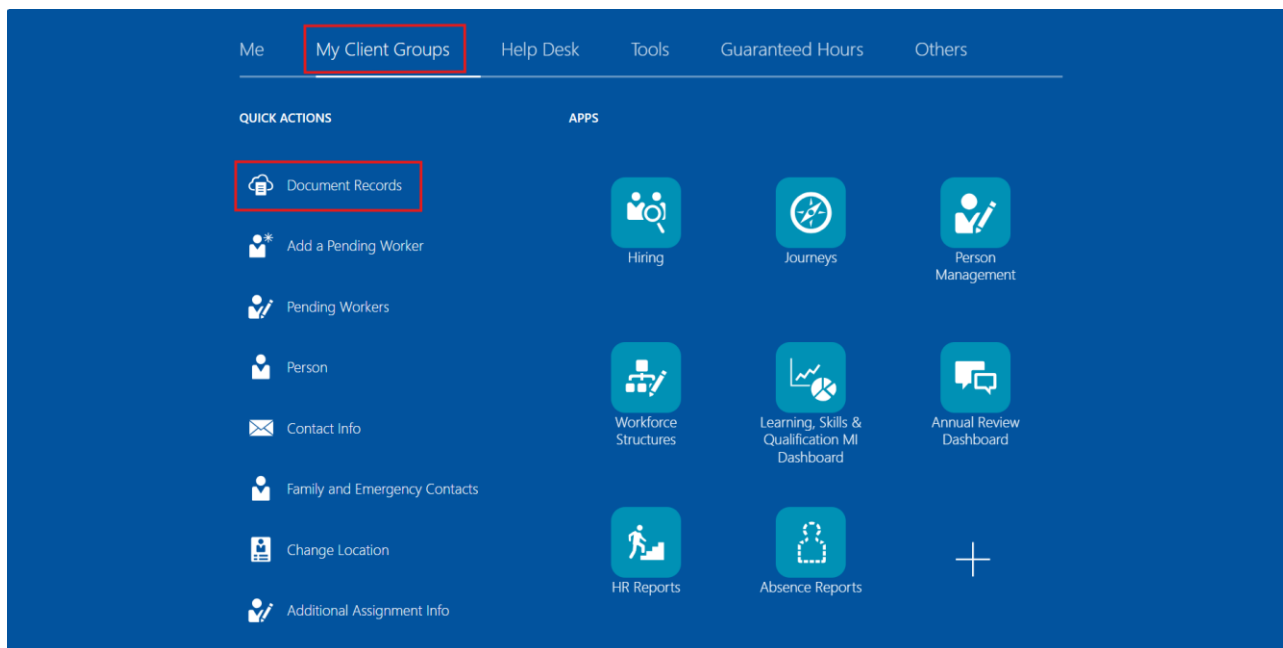
6. To **Download** or **Preview** any of the attachments, click on the **ellipsis icon**.



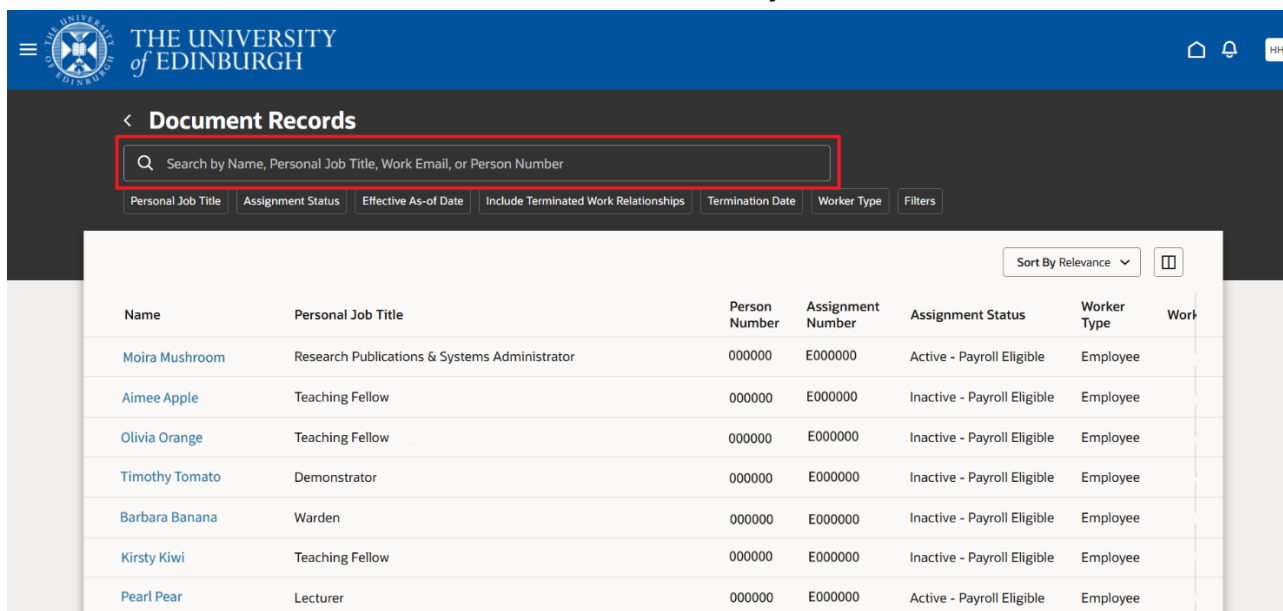
7. Click on the cross at the top right hand corner to exit the pop up screen.

## Uploading Documents to an Employee's Document Records

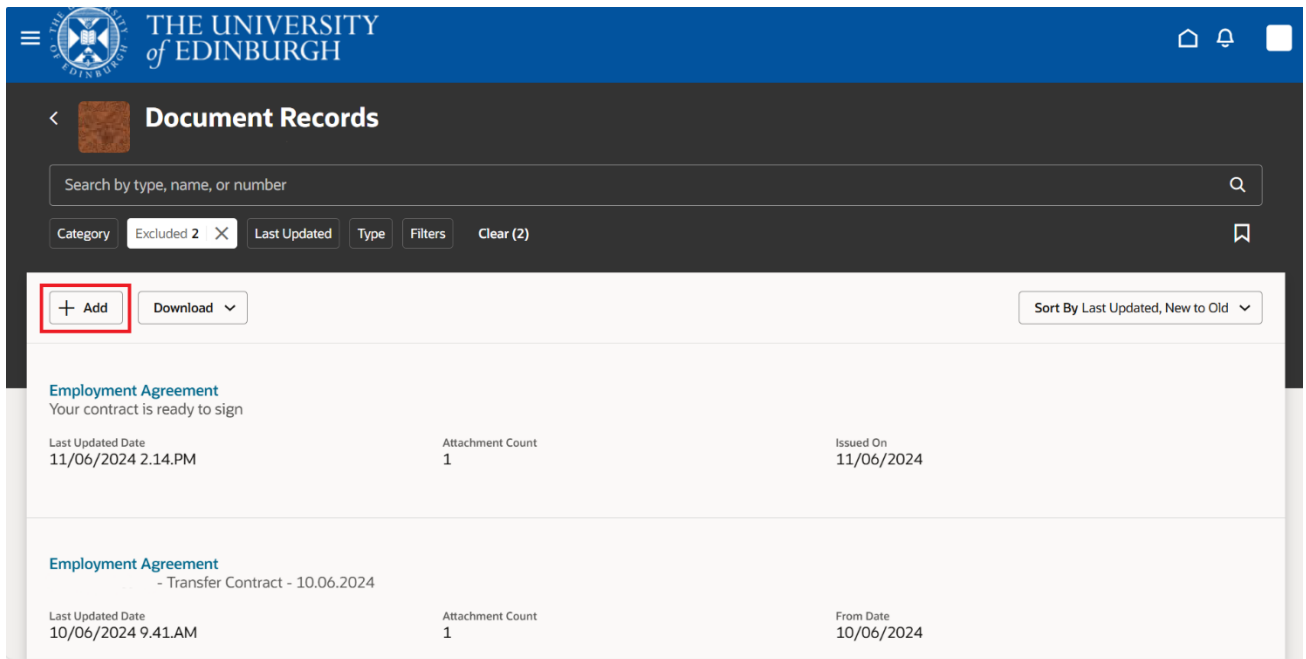
1. From the **Home** page, click on the **My Client Groups** tab. Under the **Quick Actions** menu, select **Document Records**.



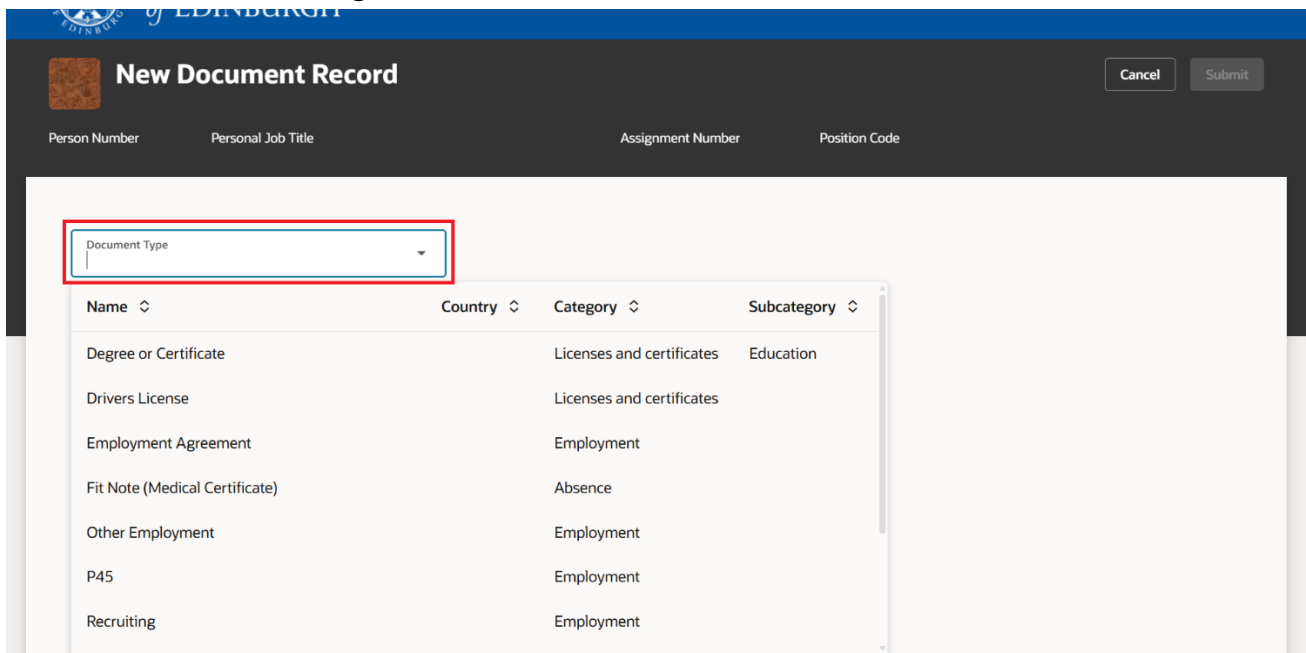
2. You can search for the employee by typing their Name, Assignment Number or Person Number into the **Search Bar**. Alternatively, you can select the relevant employee from the list below the search bar. You can use the filters below the search bar to refine your search.



3. To upload documentation for the employee, click on the **Add** button in the **Document Records** 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. For a list of all the documents available for a School/Department Admin to view and upload, check the [Appendix](#).

6. Complete the fields in the online form with the relevant details.

The screenshot shows a web 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:**

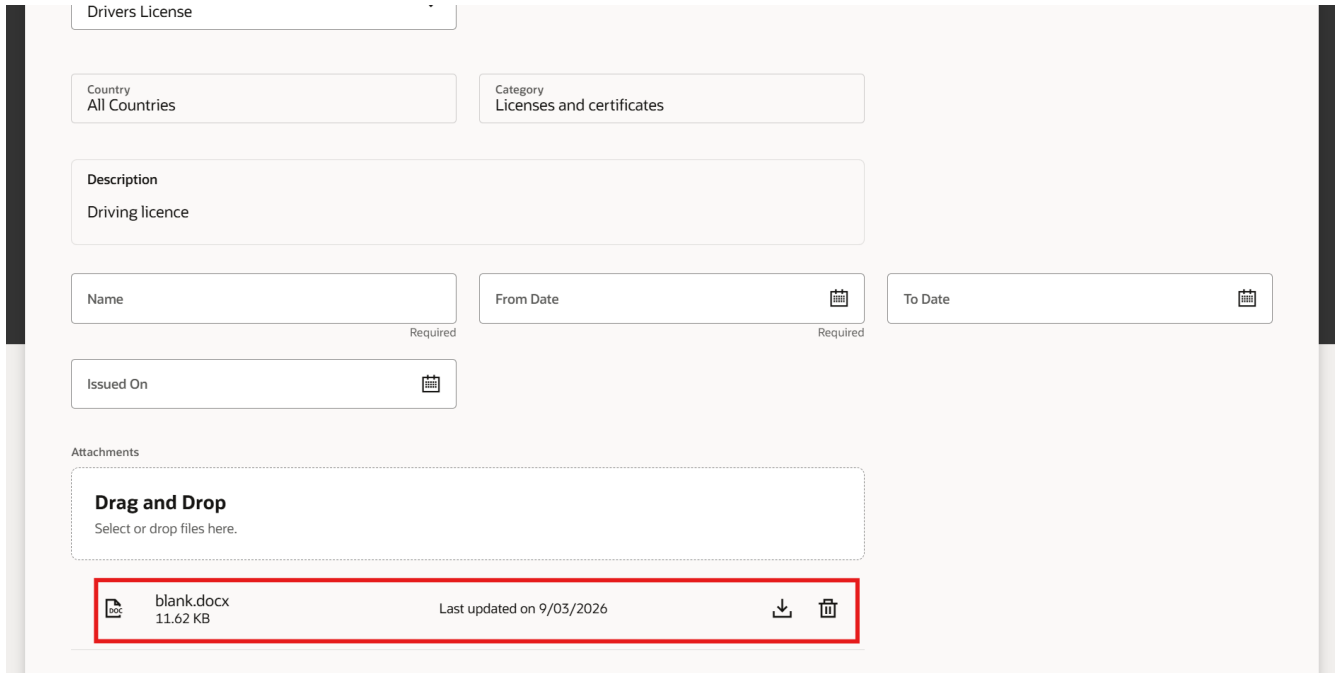
- The **Name** and **From Date** fields appear for all Document Types but **Issued On** does not. Only complete the fields that appear.
- The **From Date** is the date the document was uploaded and the **Issued Date** is the date the document was issued.

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

This screenshot is identical to the one above, but the **Drag and Drop** field in the **Attachments** section is highlighted with a red rectangular border.

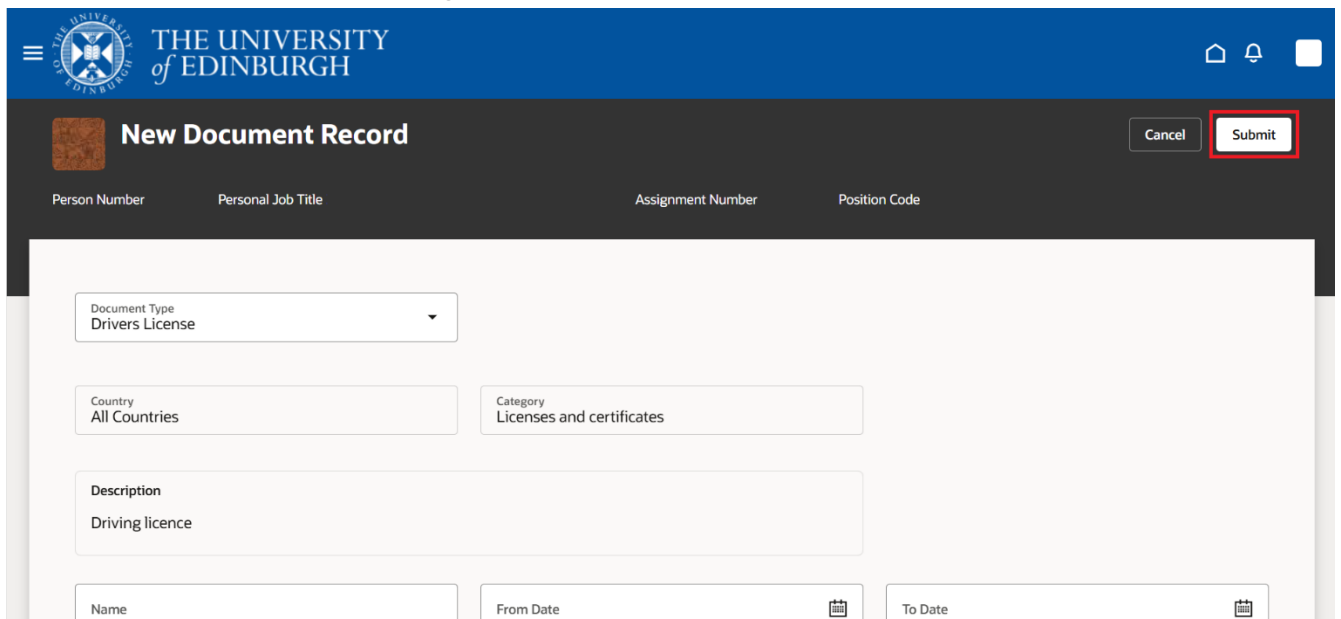
8. Navigate to the location where the document is stored and select it. The document will appear below the **Drag and Drop** field.

To add multiple attachments, repeat steps 7 and 8 for each file.



The screenshot shows a form for adding a document record. At the top, there is a dropdown menu for 'Document Type' set to 'Drivers License'. Below this are fields for 'Country' (All Countries) and 'Category' (Licenses and certificates). A 'Description' field contains 'Driving licence'. There are three date fields: 'Name' (Required), 'From Date' (Required), and 'To Date'. Below these is an 'Issued On' date field. The 'Attachments' section features a 'Drag and Drop' area with the text 'Select or drop files here.' Below this area, a file named 'blank.docx' (11.62 KB) is listed, with a red box highlighting it. The file entry includes a document icon, the filename and size, the text 'Last updated on 9/03/2026', and download and delete icons.

9. Click **Submit** at the top of the page.



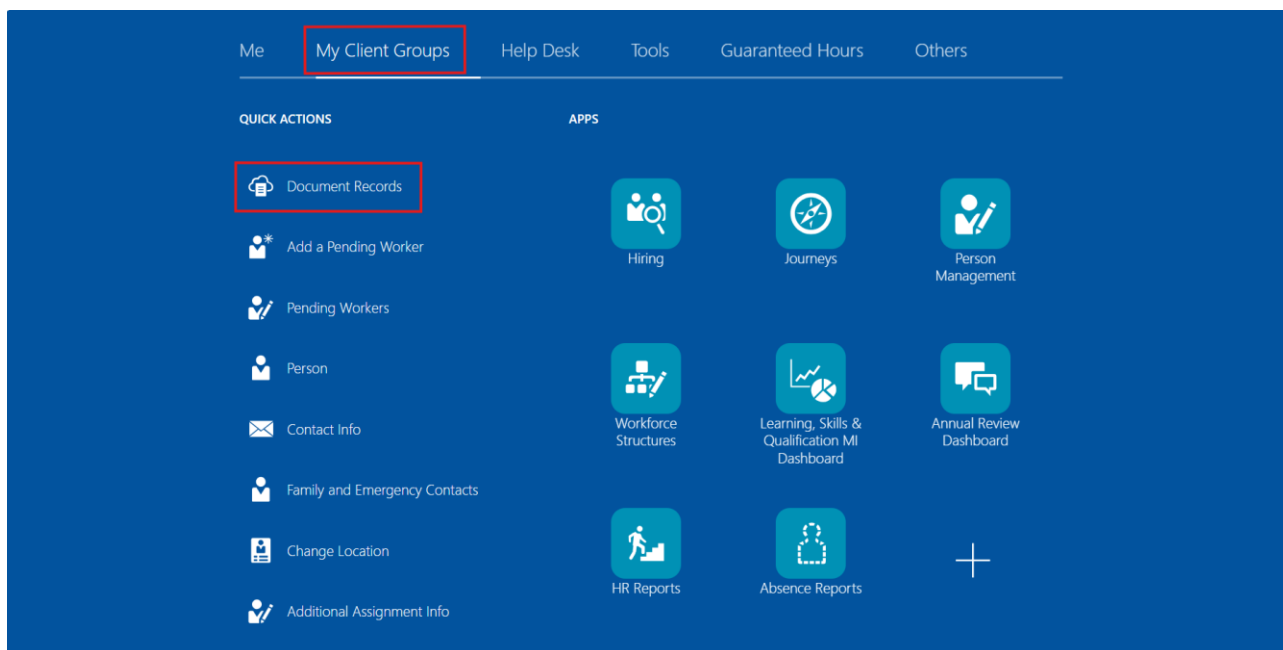
The screenshot shows the 'New Document Record' form at the top of the page. The header includes the University of Edinburgh logo and name. The form title is 'New Document Record'. At the top right, there are 'Cancel' and 'Submit' buttons, with the 'Submit' button highlighted by a red box. Below the title, there are fields for 'Person Number', 'Personal Job Title', 'Assignment Number', and 'Position Code'. The form content is identical to the previous screenshot, showing the 'Drivers License' document type, 'All Countries' country, 'Licenses and certificates' category, 'Driving licence' description, and three date fields. The 'Attachments' section is also visible, showing the 'blank.docx' file.

10. To upload another document for the employee, click the **Add** button and repeat steps 4 to 9.

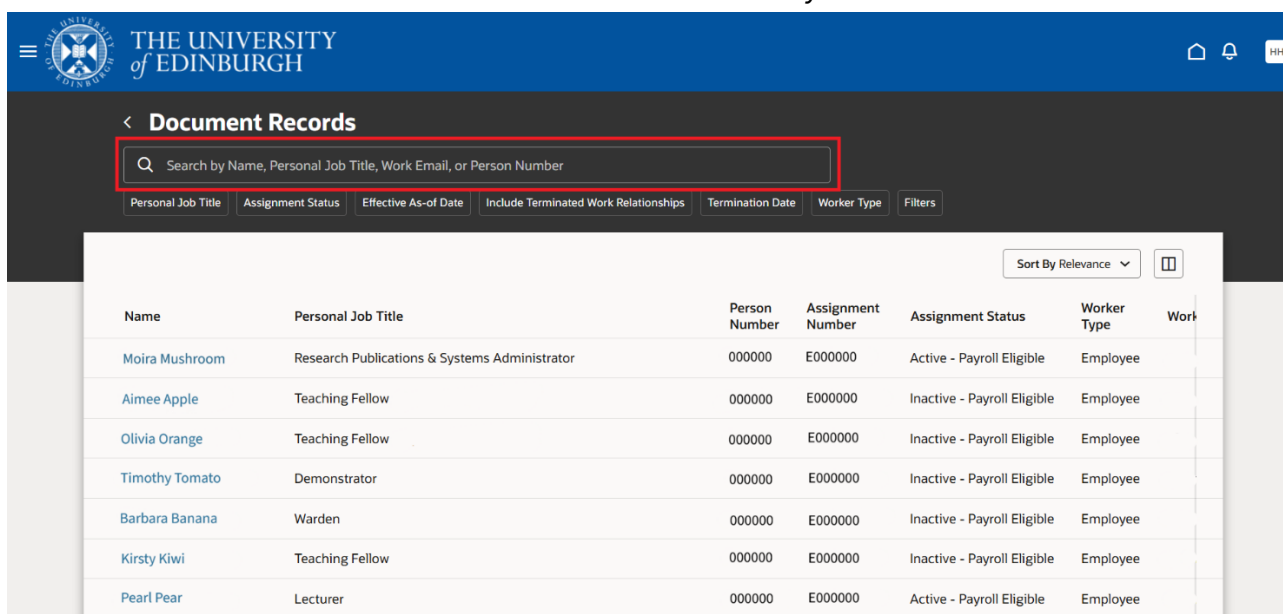
## Editing an Employee's Document in Document Records

Please note, Line Managers can only edit the document type '**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 **My Client Groups**. Then, click on **Document Records** from the **Quick Actions** menu.



2. Type the employee's Name or Person Number in the **Search bar** and click on their name to continue. You can use **filters** below the Search bar to refine your search.



3. All the documents held against this employee's record should be listed on the screen. Click on the document you want to edit.

+ Add    Download ▾    Sort By Last Updated, New to Old ▾

**Degree or Certificate**  
PhD  
Last Updated Date: 12/03/2026 8.45.AM    Attachment Count: 1    From Date: 12/03/2026

**Employment Agreement**  
- Secondment agreement -  
No signature needed  
Last Updated Date: 10/01/2025 10.07.AM    Attachment Count: 1    From Date: 20/01/2025

**Recruiting Job Offer Letters**  
HR  
Last Updated Date: 16/12/2024 1.53.PM    Attachment Count: 4

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

+ Add    Download ▾

**Degree or Certificate**  
PhD  
Last Updated Date: 12/03/2026 8.45.AM    Attachment Count: 1

**Employment Agreement**  
- Secondment agreement -  
No signature needed  
Last Updated Date: 10/01/2025 10.07.AM    Attachment Count: 1

**Recruiting Job Offer Letters**  
HR  
Last Updated Date: 16/12/2024 1.53.PM    Attachment Count: 4

Subcategory  
Education

Name  
PhD

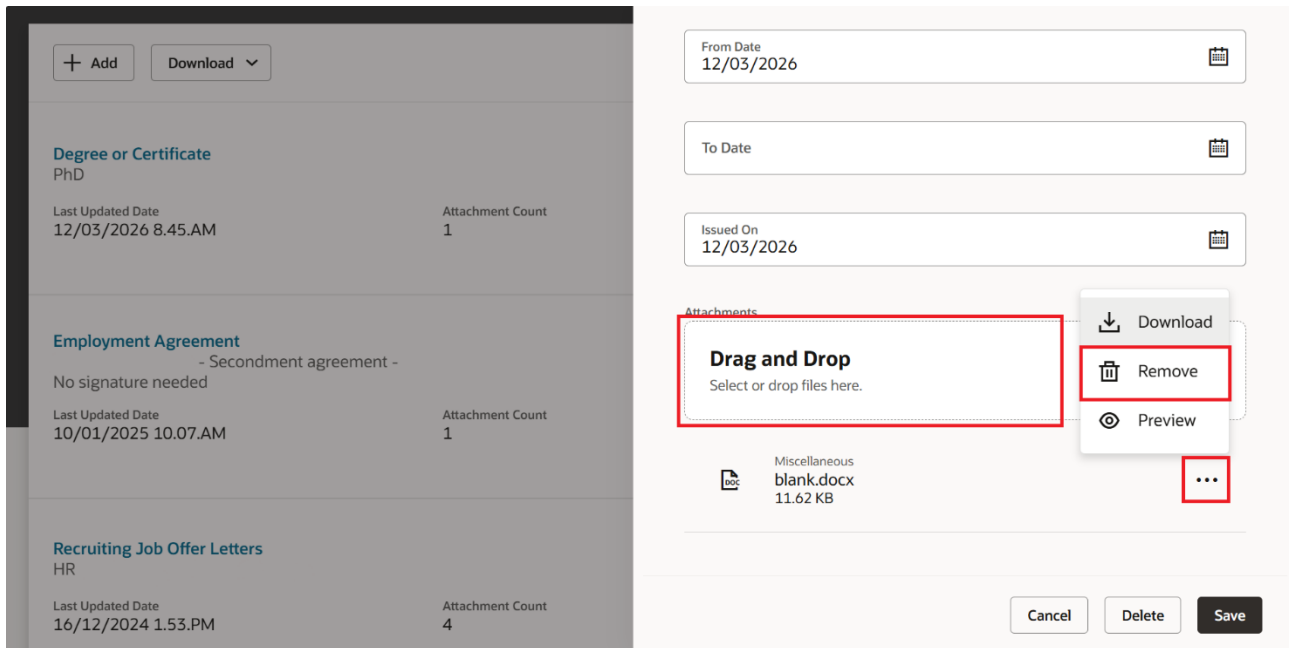
From Date  
12/03/2026

To Date

Issued On  
12/03/2026

Attachments  
**Drag and Drop**  
Select or drop files here.

5. 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**.



6. 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).
7. Once you have made the relevant amendments, scroll to the bottom of the pop up screen and click on the **Save** button.

## Appendix

### Appendix A – Documents available to view or upload for School/Department Administrators (SDA)

There are a number of document types in Document Records that an SDAs can view and upload:

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	✓	✓	✗	✓	✗
Right to work documents	Right to work documents	✓	✓	✗	✓	✗
Self Certificate (Return to Work)	Self Certificate (Return to Work)	✓	✓	✗	✓	✗

<b>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.</b>						
Application	Application	View only				
Casual Worker – Right to Work Documents	Casual Worker – Right to Work Documents	View only				
Other Employment	Other Employment	View only				
Relocation – Repayment terms – Partner career transition repayment agreement	Repayment terms – Partner career transition repayment agreement	View only				
Relocation – Repayment terms – Relocation repayment agreement	Repayment terms – Relocation repayment agreement	View only				
Resignation Letter	Resignation Letter	View only				

## Version History

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