



System User Guide

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

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Introduction

This guide covers key tasks for Line Managers in searching, viewing and uploading employee documents in People and Money. It is related to the Process User Guide for Employee Files which is linked below.

[Guide to Employee Files](#)

All line managers should familiarise themselves with the Guide to Employee Files. A line manager 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 documents 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 **My Team**. Then, click on **Document Records** from the Quick Actions menu.
2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.
3. All the documents held against this employee's record will be listed on the screen. You can search for a specific document using the search bar and/or the filters below the search bar.

Uploading a new Document to an Employee's Document Records

1. From the Home page, click on **My Team**. Then, click on **Document Records** from the Quick Actions menu.
2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.
3. All the documents held against this employee's record should be listed on the screen.
4. Click on the **Add** button on the top left corner.
5. From the Document Type dropdown menu, **select** the appropriate type of document you wish to upload.
6. **Fill in** the relevant details in the fields that appear.
7. If you wish to upload an attachment, click on the **Drag and Drop** field.
8. Select the document you want to upload. Once the document has uploaded successfully, it will appear below the **Drag and Drop** section.
9. Once you have finished filling in the fields and uploading any attachments, scroll to the top of the page and click on **Submit**.

Editing an Existing Document in an Employee's Document Records

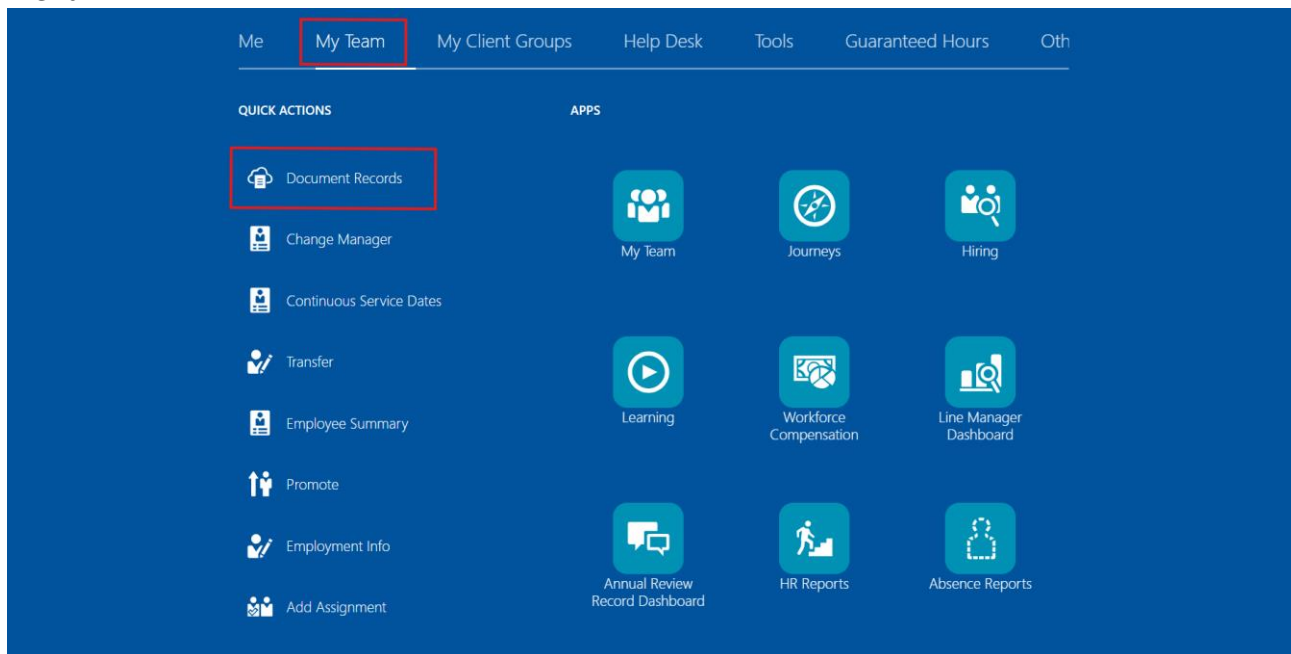
1. From the Home page, click on **My Team**. Then, click on **Document Records** from the Quick Actions menu.
2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.
3. All the documents held against this employee's record should be listed 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.

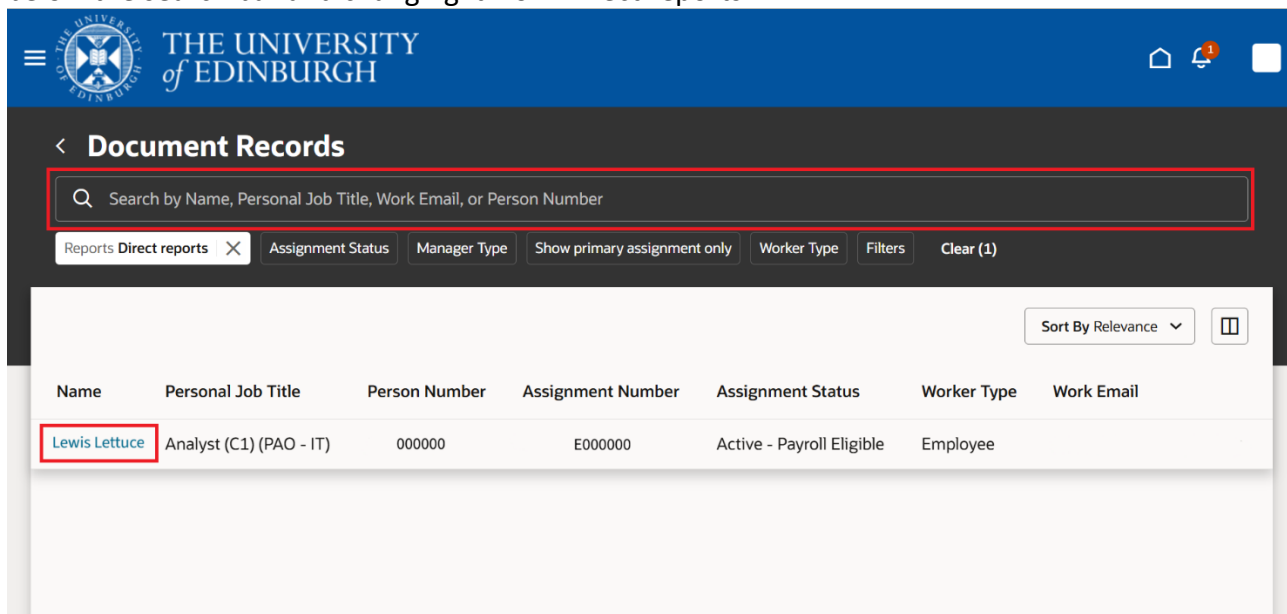
Searching for and Viewing a Document in an Employee's Document Records

1. From the Home page, click on **My Team**. Then, click on **Document Records** from the Quick Actions menu.



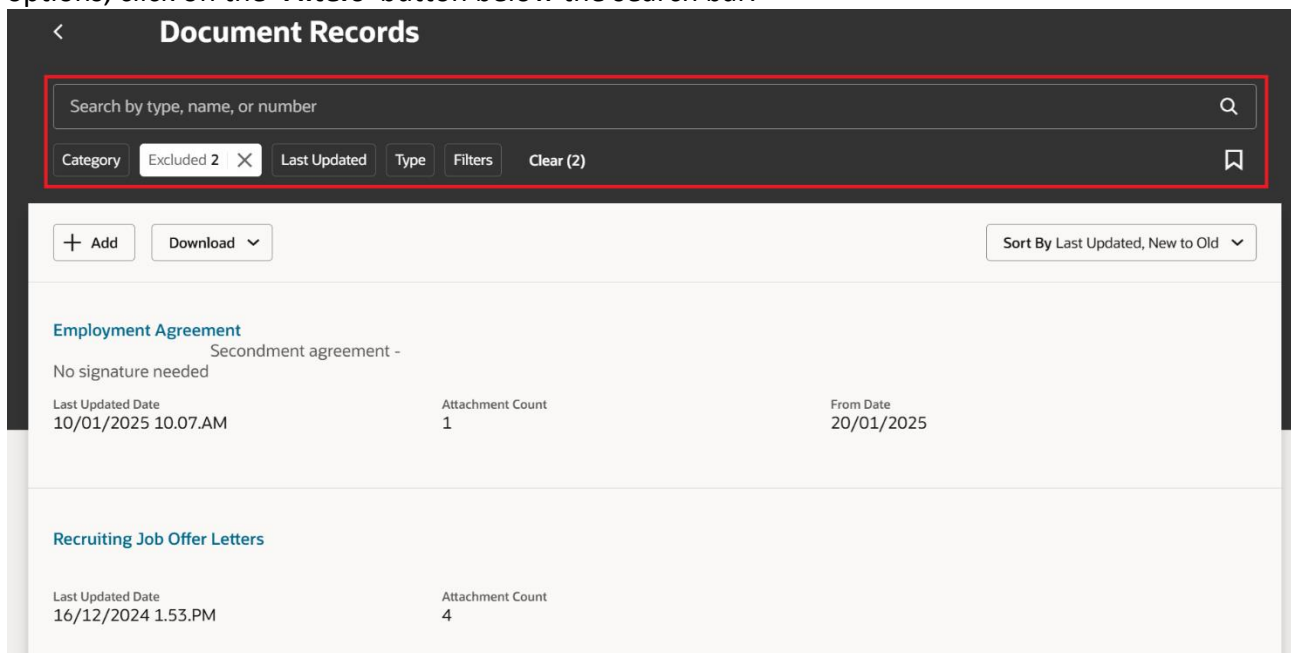
2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.

If you wish to view all of the reports in your area, you can do this by clicking on the **Reports** filter below the search bar and changing it from Direct reports.

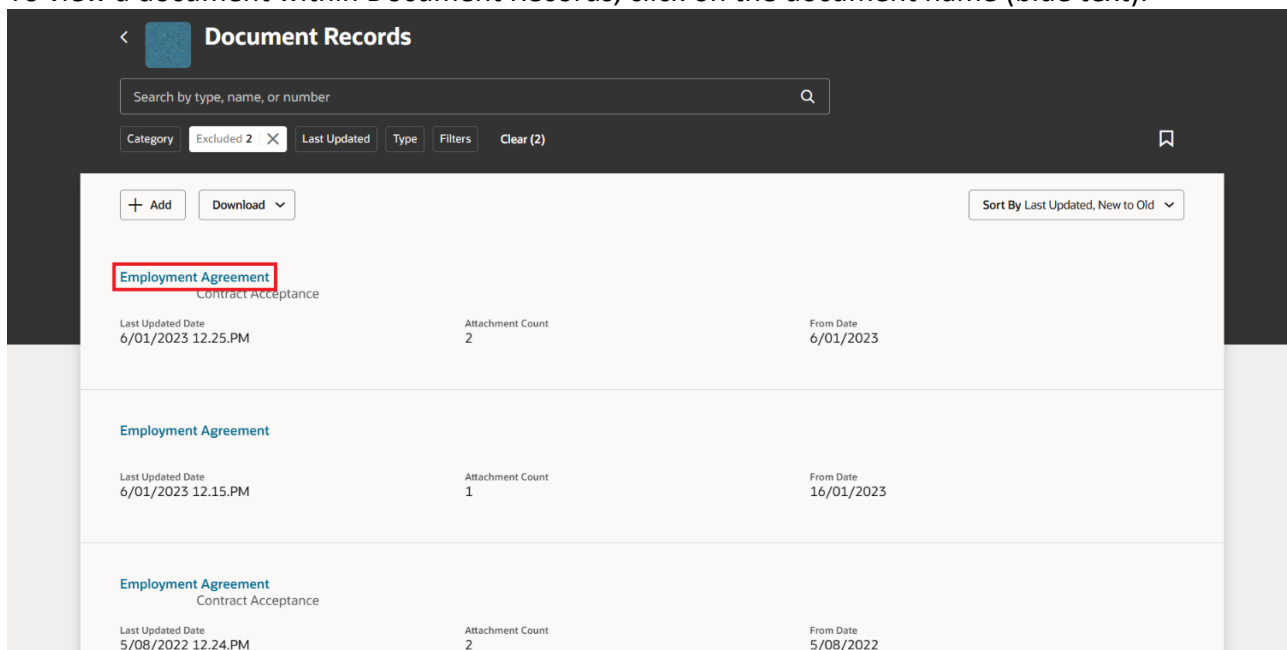


3. All the documents held against the employee's record will be listed on the screen.

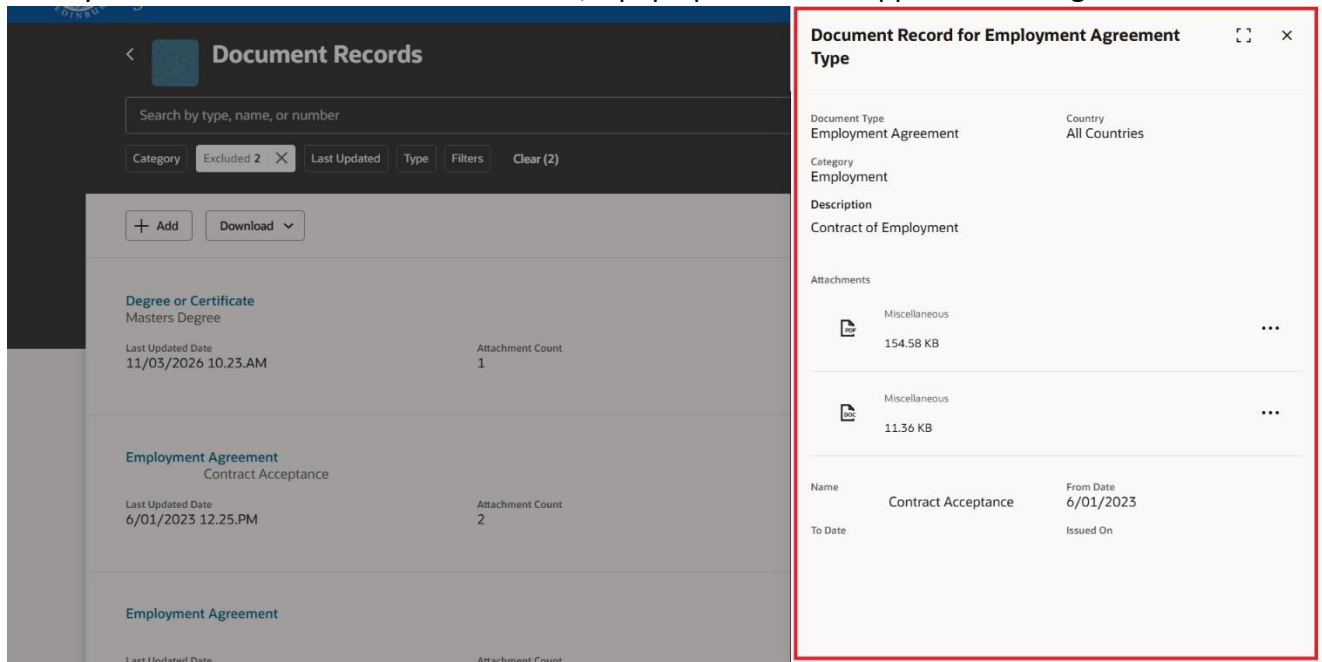
You can use the **search bar** at the top of the page to search for a specific document type. Alternatively, you can use the **filters** below the search bar to refine your search. To view more filter options, click on the **'Filters'** button below the search bar.



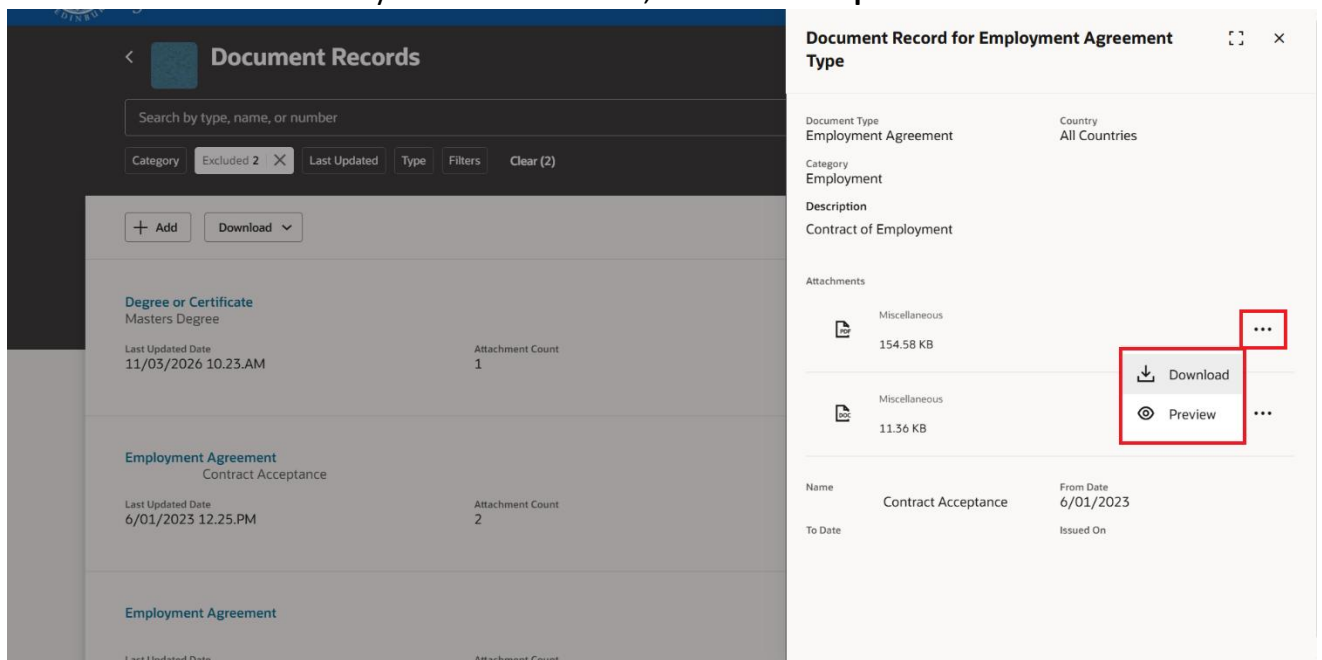
4. To view a document within Document Records, click on the document name (blue text).



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



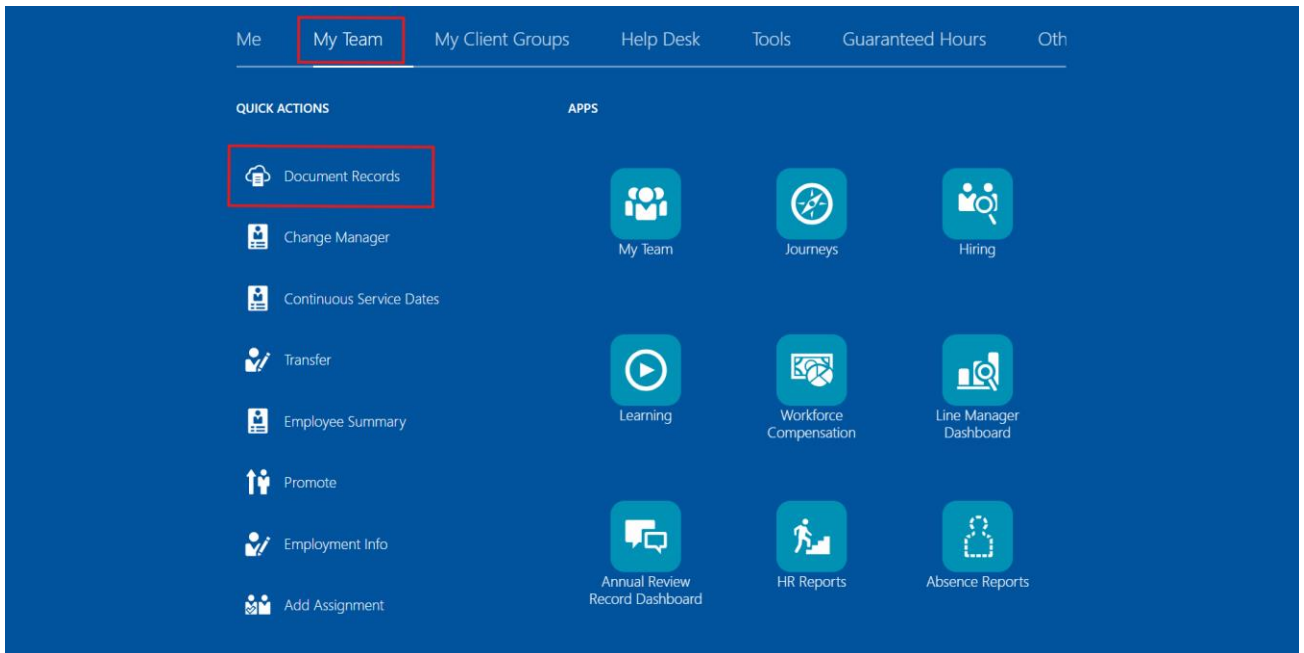
6. To Download or Preview any of the attachments, click on the ellipsis icon.



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

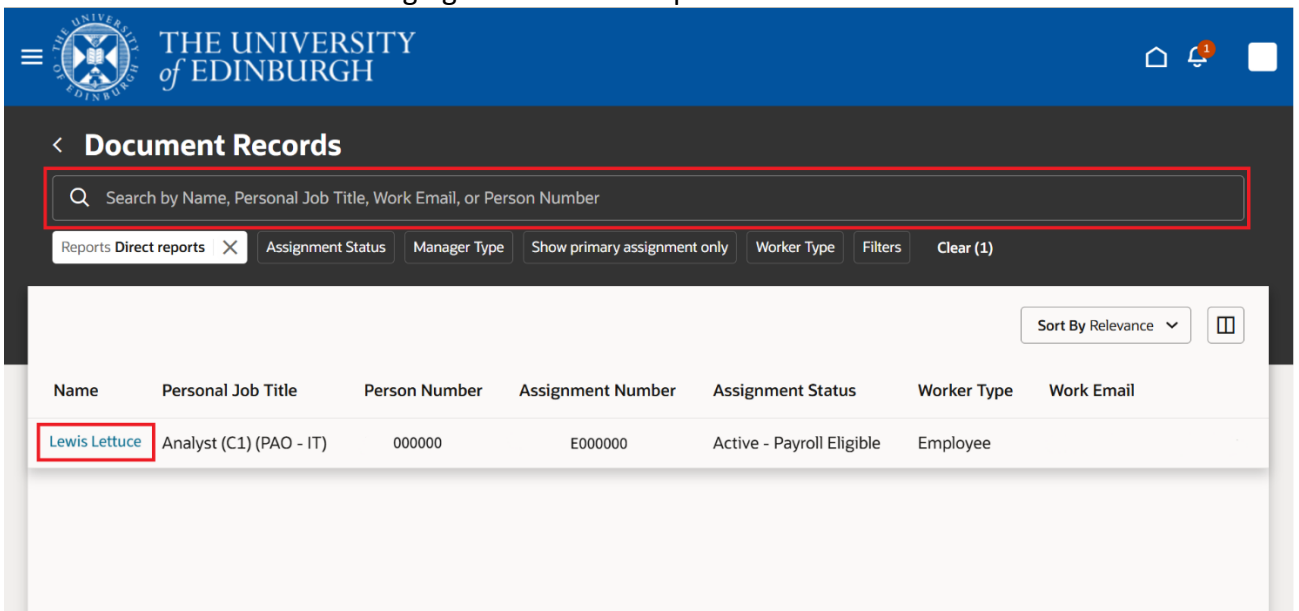
Uploading a new Document to an Employee's Document Records

1. From the Home page, click on **My Team**. Then, click on **Document Records** from the Quick Actions menu.



2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.

If you wish to view all of the reports in your area, you can do this by clicking on the **Reports** filter below the search bar and changing it from Direct reports.



3. All the documents held against this employee's record should be listed on the screen.

The screenshot shows the 'Document Records' interface. At the top, there is a search bar with the placeholder text 'Search by type, name, or number'. Below the search bar, there are filter buttons: 'Category', 'Excluded 2' (with an 'X' icon), 'Last Updated', 'Type', 'Filters', and 'Clear (2)'. On the right side of the filter bar, there is a bookmark icon. Below the filter bar, there are two buttons: '+ Add' and 'Download' (with a dropdown arrow). On the far right, there is a sort dropdown menu set to 'Sort By Last Updated, New to Old'. The main content area displays two document entries. The first entry is titled 'Employment Agreement' with a subtitle 'Secondment agreement - No signature needed'. It shows 'Last Updated Date' as '10/01/2025 10.07.AM', 'Attachment Count' as '1', and 'From Date' as '20/01/2025'. The second entry is titled 'Recruiting Job Offer Letters' and shows 'Last Updated Date' as '16/12/2024 1.53.PM' and 'Attachment Count' as '4'.

4. Click on the **Add** button on the top left corner.

This screenshot is identical to the one above, but the '+ Add' button in the top left corner of the document list area is highlighted with a red rectangular box. The rest of the interface, including the search bar, filters, and document list, remains the same.

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

The screenshot shows the 'New Document Record' form. At the top, there are fields for 'Person Number', 'Personal Job Title', 'Assignment Number', and 'Position Code'. Below these is a 'Document Type' dropdown menu, which is highlighted with a red box. The dropdown menu is open, showing a list of document types with columns for 'Name', 'Country', 'Category', and 'Subcategory'.

Name	Country	Category	Subcategory
Degree or Certificate		Licenses and certificates	Education
Drivers License		Licenses and certificates	
Employment / Compensation Verification		Employment	
Employment Agreement		Employment	
Fit Note (Medical Certificate)		Absence	
Other Employment		Employment	

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

6. **Fill in** the relevant details in the fields that appear.

The screenshot shows the 'New Document Record' form with the following fields filled in:

- Document Type: Fit Note (Medical Certificate)
- Country: All Countries
- Category: Absence
- Description: Fit Note (Medical Certificate)
- Name: (empty)
- From Date: (empty)
- To Date: (empty)
- Issued On: (empty)

There is an 'Attachments' section with a 'Drag and Drop' area for selecting or dropping files.

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

7. If you wish to upload an attachment, click on the **Drag and Drop** box.

The screenshot shows a form with the following fields: Document Type (Fit Note (Medical Certificate)), Country (All Countries), Category (Absence), Description (Fit Note (Medical Certificate)), Name (Required), From Date (Required), To Date (Required), and Issued On. The Attachments section contains a red-bordered box with the text "Drag and Drop" and "Select or drop files here."

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 the same form as above, but with a document attachment listed below the Attachments section. The attachment is named "blank.docx" (11.62 KB) and was last updated on 11/03/2026. It has download and delete icons. The "Drag and Drop" field is still present above the attachment.

9. Once you have finished filling in the fields and uploading any attachments, scroll to the top of the page and click on **Submit**.

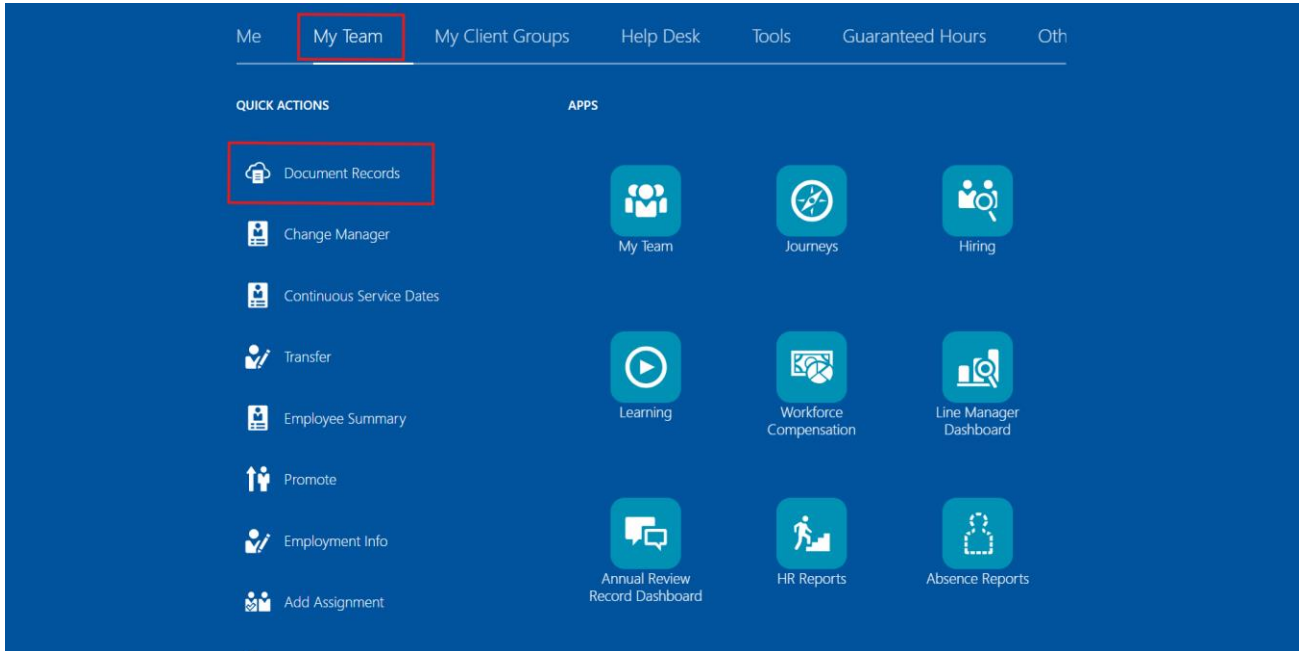
The screenshot shows the 'New Document Record' form in the University of Edinburgh system. The header includes the university logo and name, along with navigation icons for home, notifications, and user profile. The form title is 'New Document Record' with 'Cancel' and 'Submit' buttons. Below the title are four columns: 'Person Number', 'Personal Job Title', 'Assignment Number', and 'Position Code'. The main form area contains a 'Document Type' dropdown menu set to 'Fit Note (Medical Certificate)'. Below this are two input fields: 'Country' (set to 'All Countries') and 'Category' (set to 'Absence'). A 'Description' field contains the text 'Fit Note (Medical Certificate)'. At the bottom, there are three input fields: 'Name', 'From Date', and 'To Date', each with a calendar icon.

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

Editing an Existing Document in an Employee's Document Records

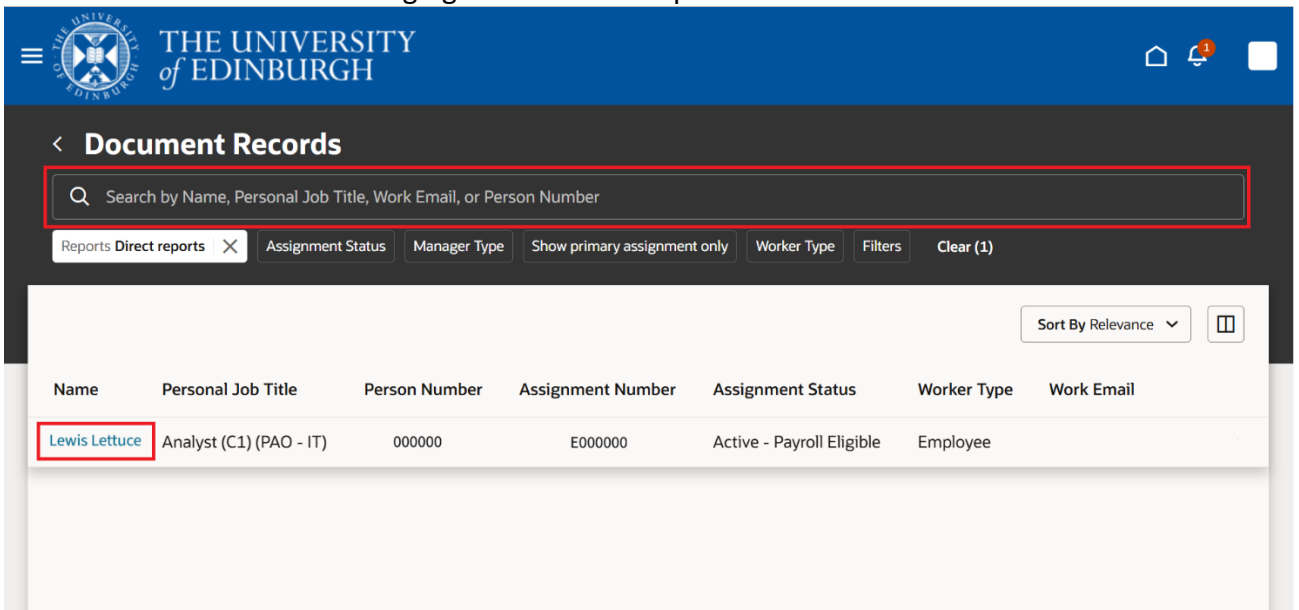
Please note, Line Managers can only edit the document type '**Degree or Certificate**'. If you need to edit any other document type, please raise a Service Request with HR Helpline.

1. From the Home page, click on **My Team**. Then, click on **Document Records** from the Quick Actions menu.



2. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box.

If you wish to view all of the reports in your area, you can do this by clicking on the **Reports** filter below the search bar and changing it from Direct reports.



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

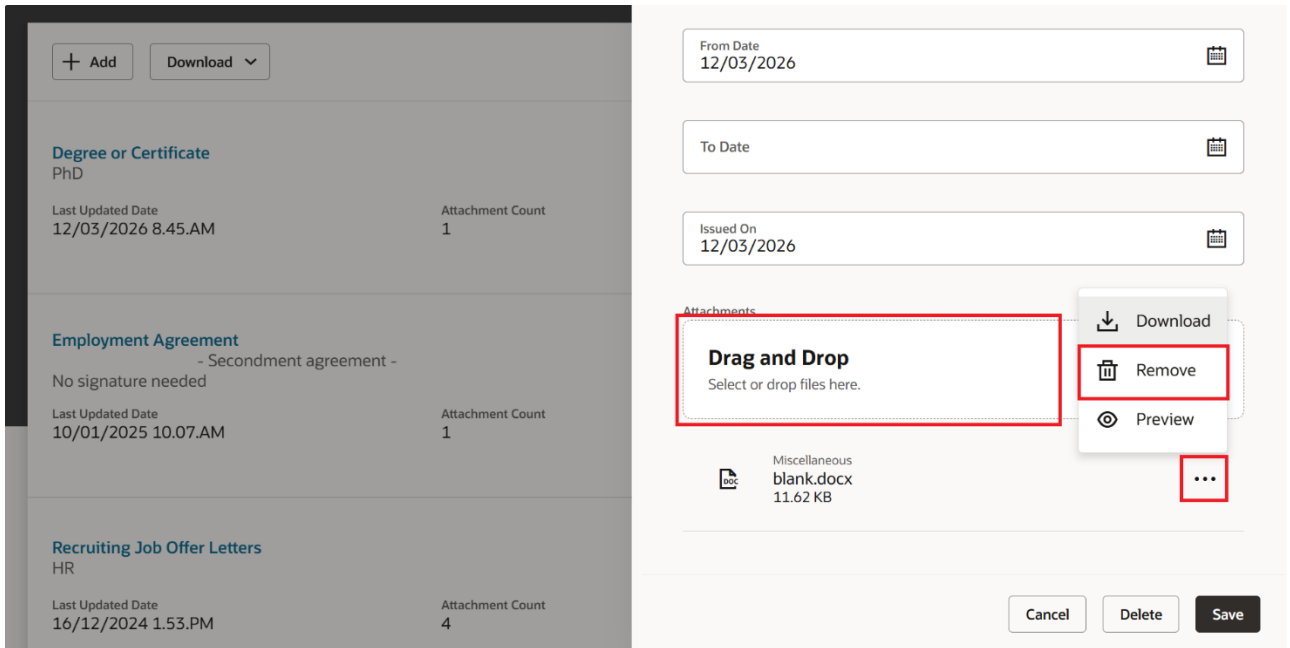
+ Add		Download ▾		Sort By Last Updated, New to Old ▾	
Degree or Certificate					
PhD					
Last Updated Date		Attachment Count		From Date	
12/03/2026 8.45.AM		1		12/03/2026	
Employment Agreement					
- Secondment agreement - No signature needed					
Last Updated Date		Attachment Count		From Date	
10/01/2025 10.07.AM		1		20/01/2025	
Recruiting Job Offer Letters					
HR					
Last Updated Date		Attachment Count			
16/12/2024 1.53.PM		4			

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

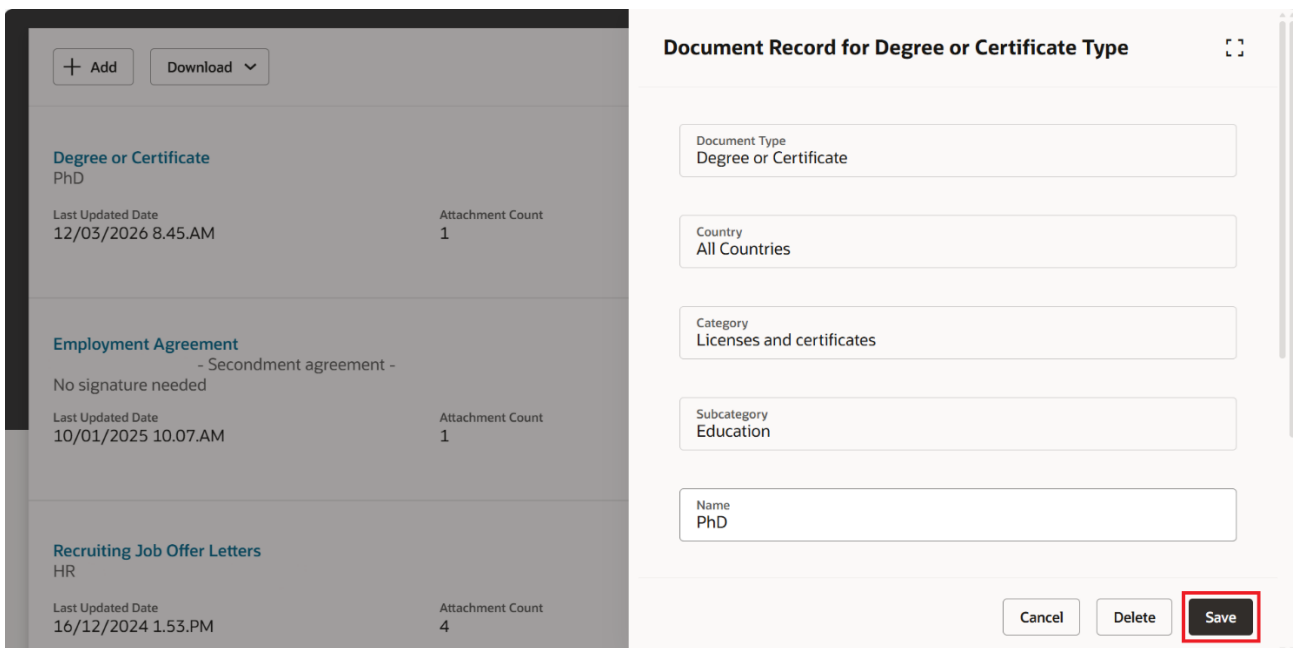
If you wish to delete the document type all together, you can do so by clicking on the **Delete** button (next to the **Save** button).

+ Add		Download ▾		Subcategory Education	
Degree or Certificate					
PhD					
Last Updated Date		Attachment Count		Name	
12/03/2026 8.45.AM		1		PhD	
From Date		To Date		Issued On	
12/03/2026				12/03/2026	
Employment Agreement					
- Secondment agreement - No signature needed					
Last Updated Date		Attachment Count			
10/01/2025 10.07.AM		1			
Recruiting Job Offer Letters					
HR					
Last Updated Date		Attachment Count			
16/12/2024 1.53.PM		4			
Attachments					
Drag and Drop Select or drop files here.					

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 the relevant amendments, scroll to the bottom of the pop up screen and click on the **Save** button.



Appendix

Appendix A – Employee Documents available for Line Managers to view or upload

There are a number of document types in Document Records that a line manager can view and upload as follows:

Document Type	Description	View	Add	Edit	Download	Delete
Degree or Certificate	Qualification	✓	✓	✓	✓	✓
Fit Note (Medical Certificate)	Medical Certificate	✓	✓	✗	✓	✗
Right to Work	Right to Work	✓	✓	✗	✓	✗
Self Certificate (Return to Work)	Self Certificate (Return to Work)	✓	✓	✗	✓	✗
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.						
Resignation Letter	Resignation Letter	View only				
Casual Worker – Right to Work Documents	Right to Work Documents	View only				

Version History

Version	Date	Description	Approved By
0.1	N/A	Draft	
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.