



THE UNIVERSITY *of* EDINBURGH

System User Guide

Line Manager and School/Department Administrator (SDA) Guide - How to Change Location

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.....	2
In Detail.....	3
Version History	8
Reviewers & Approvers	8

Introduction

This guide covers key tasks for **Line Managers** and **School/Department Administrators** in 'How to **change location**' system process.

In Brief

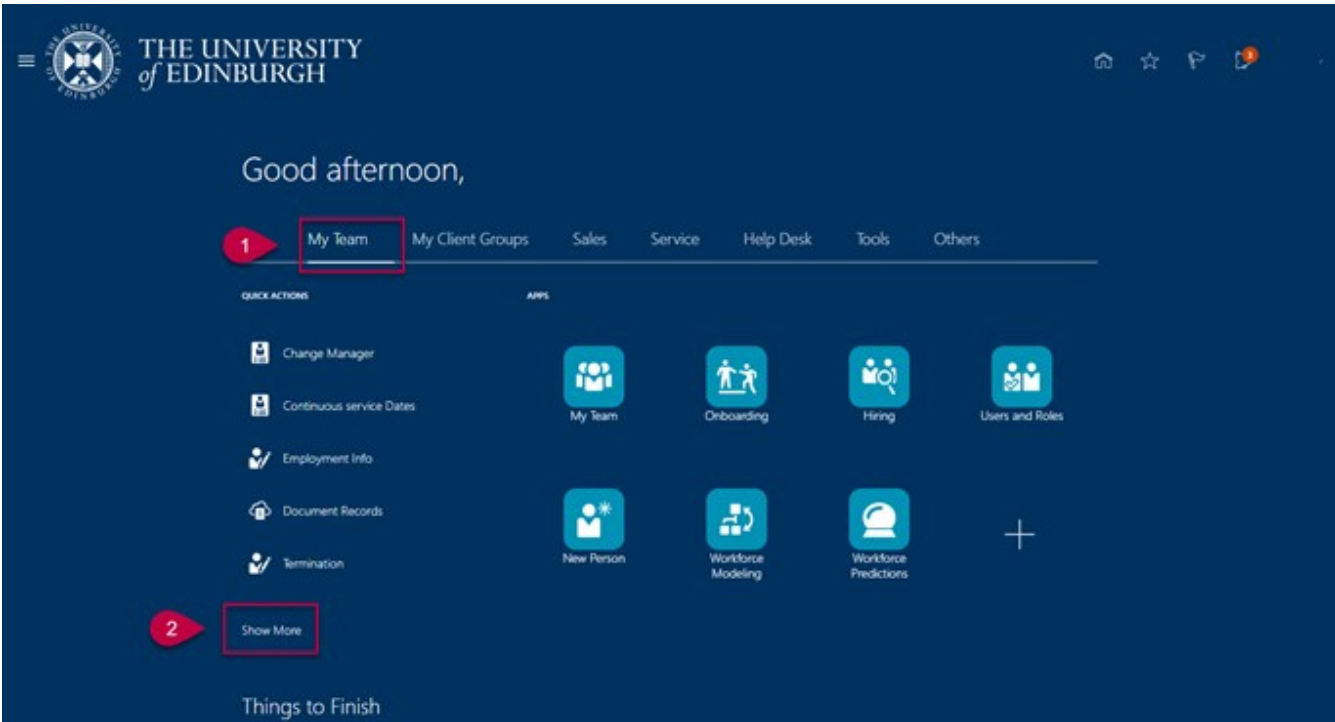
This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

1. From the Dashboard, select **My Team** and then select **Show More** under **Quick Actions**.
Note: School/Department Admins should select **My Client Groups**.
2. In the Employment section, select **Change Location**.
3. Populate the search bar with their **Name, Person Number** or **Assignment Number**.
4. In **When and Why** section, select the **Date** on which the location change starts.
5. Then click on **Continue**.
6. In the Assignment section, to change location search and select from the dropdown list.
7. Click on **Continue**.
8. If relevant, add in any **Comments and Attachments**. Then click on **Submit**.

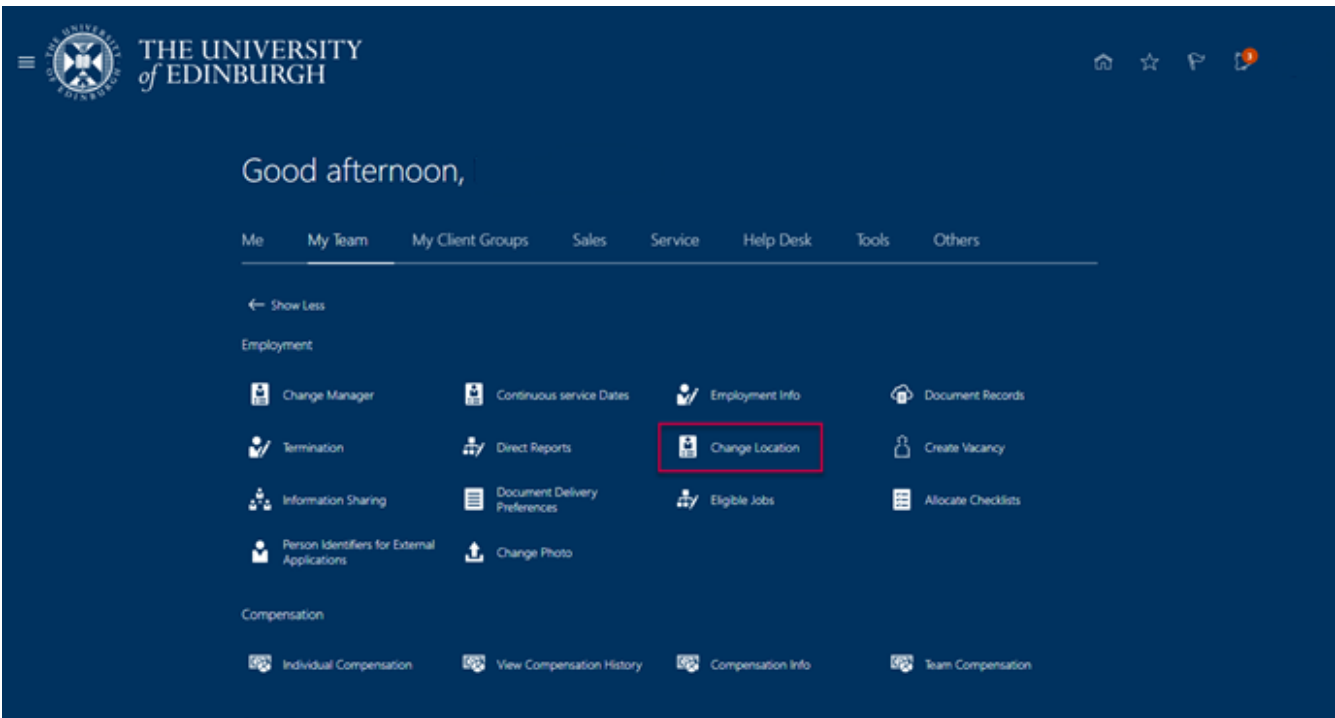
In Detail

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

- 1. From the Dashboard, select **My Team** and then select **Show More** under **Quick Actions**
Note: If you're a School/Department Admins, please select **My Client Groups**.



- 2. In the **Employment** section, select **Change Location**.



- Populate the search bar with the employee's **Name**, **Person Number** or **Assignment Number**. Alternatively, select from the list below the search bar.

If the employee holds multiple assignments, all numbers will appear in the search but you can use the filters to locate the correct record to update.

< Change Location

Search by name, person number, or assignment number

Reports Direct reports X Assignment Status Manager Type Show primary assignment only Worker Type Filters Clear (1)

Name	Personal Job Title	Person Number	Assignment Number	Assignment Status	Worker Type	Work Email
				Active - Payroll Eligible	Employee	
				Active - Payroll Eligible	Employee	
				Active - Payroll Eligible	Employee	

Sort By Relevance

- In **When and Why** section, select the **Date** on which the location change starts.

Change Location

When and why

When does the location change start?

What's the way to change the location?

1 | 4

When and why

Position override

Assignment

Cancel Continue Submit

Note: As you move through the steps in change location, the fields and number of steps on the right may change as the action is selected.

Note: if an individual has a future dated assignment you will receive a warning message at the top. If the change is to continue **beyond** the date shown in the message, you will need to submit change the again.

Change Location

CW When and why

▲ This employee has a future-dated change

The start date change will be applied until the closest future assignment change start date of 1/09/2025.

×

When does the location change start?

Required

What's the way to change the location?

Why are you changing the location?

Cancel

Continue

Submit

1 | 4

When and why

Position override

Assignment

5. Then click on **Continue**.

Change Location

When and why

When does the location change start?

1/07/2025

Cancel

Continue

Submit

1 | 4

When and why

Position override

Assignment

Page 5 of 8

PM1114
26B V1.0 July 2026

6. In the **Assignment** section, to change location, start **typing** the desired location into the dropdown box by way of searching and options will appear. **Select** the correct location.

Change Location

Assignment

Location

Name	Code	Town or City	Country
1 George Square	H9159	Edinburgh	United Kingdom
1-13 Buccleuch Place	H5213	Edinburgh	United Kingdom
1-7 George Square	H5204	Edinburgh	United Kingdom
1-7 Roxburgh Street	H5218	Edinburgh	United Kingdom
12 Buccleuch Street	H5305	Edinburgh	United Kingdom

Cancel

Continue

Submit

2 | 3

When and why

Assignment

7. Click on **Continue**.

Change Location

Assignment

Location

1 George Square

Cancel

Continue

Submit

2 | 3

When and why

Assignment

8. If relevant, add in any **Comments**. If you enter a comment, you must select ‘**Save Comment**’ otherwise your comment will not be saved.

The screenshot shows a web form titled "Comments and attachments" under a "Change Location" header. The form includes a large text area for "Comments", a "Save Comment" button, a "Drag and Drop" area for file uploads, and a "URL" input field with an "Add URL" button. At the bottom are "Cancel" and "Submit" buttons. On the right, a dark sidebar displays "3 | 3" and sections for "When and why" and "Assignment". In this image, the "Comments" text area and the "Save Comment" button are highlighted with red rectangular boxes.

9. You can upload any relevant attachments by dragging the file(s) to the **Drag and Drop** box. Alternatively, you can click on the **Drag and Drop** box and select the file(s) you want to upload.

This screenshot is identical to the one above, showing the "Comments and attachments" form. However, in this version, the "Drag and Drop" box, which contains the text "Select or drop files here.", is highlighted with a red rectangular box. The "Comments" text area and "Save Comment" button are no longer highlighted.

10. Click on **Submit**.

The screenshot shows a web form titled 'Change Location'. Below the title is a section labeled 'Comments and attachments'. This section contains a large text area for 'Comments', a 'Save Comment' button, a 'Drag and Drop' area for file uploads, and a 'URL' input field with an 'Add URL' button. At the bottom right of the form, there are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted with a red rectangular box. To the right of the form is a dark sidebar with a '3 | 3' indicator at the top and some partially visible text at the bottom.

Note: To confirm that the location has updated, go to the employee's Employment page via My Client Groups > Person Management and check Location under Job Details.

Version History

Version	Date	Description	Approved By
1.0		- Transferred guide to new template - Replaced all screenshots to reflect the new look of the Redwood screens - Removal of action reasons (i.e. Why)	RM/HH

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.