



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

Contents

Introduction	2
In Brief.....	2
Enter Your Contact Details.....	2
Enter Your Emergency Contact Details	3
In Detail.....	4
Entering Your Contact Details.....	4
Phone Details.....	4
Email Details	6
Address.....	7
Entering Your Emergency Contact Details	10
Version History	13
Reviewers & Approvers	13

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

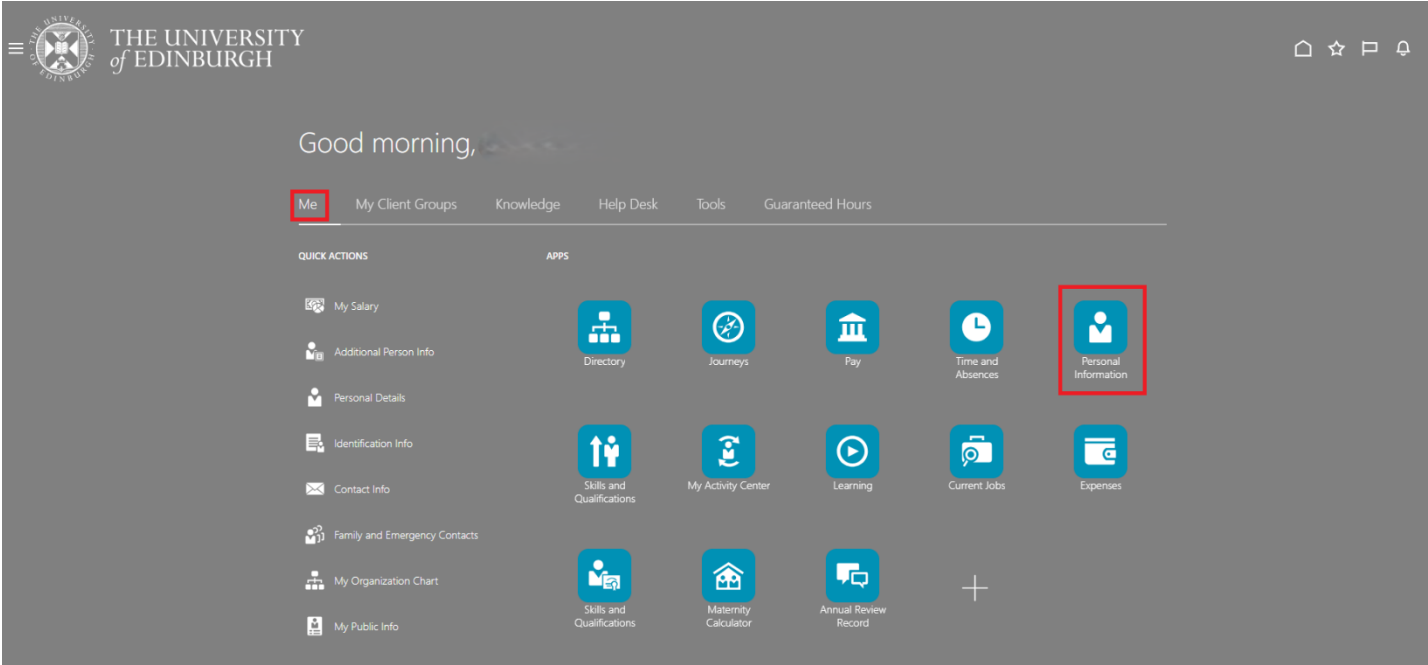
1. From the Home page open the **Me** section then click **Personal Information**.
2. Select **Family and Emergency Contacts**.
3. Click the **+Add button** to **Create a New Contact** or the **select the existing contact** to edit your information.
4. Fill out the **Basic Information, Phone Details,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

In Detail

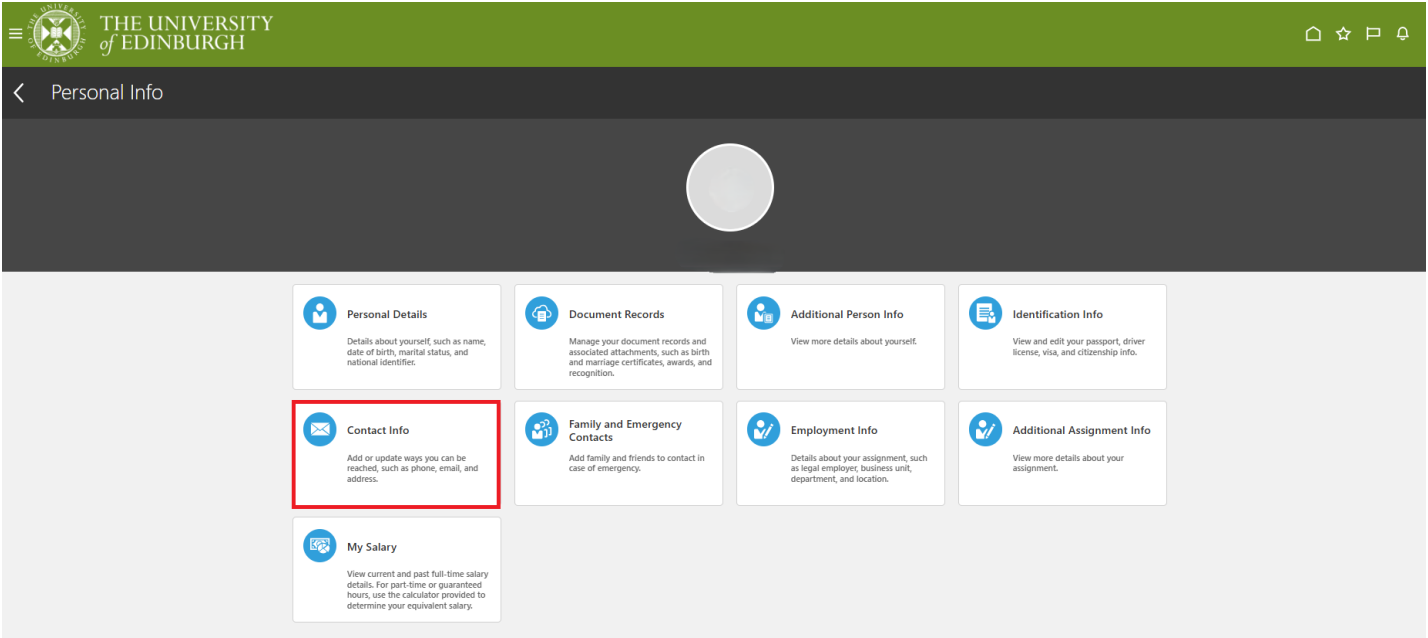
This section provides the detailed steps and includes relevant screenshots from the system.

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:

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

Phone details



Country
United Kingdom 44

Type

Area Code

Required

Number

Primary



Required

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

Notes:

- If you enter a work phone number, this will be displayed in the Directory.
- If you enter a personal phone number, this will appear for **you** when you go into the Directory. Please note that this will **not** appear for other staff unless you have additional

access e.g. HR.

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

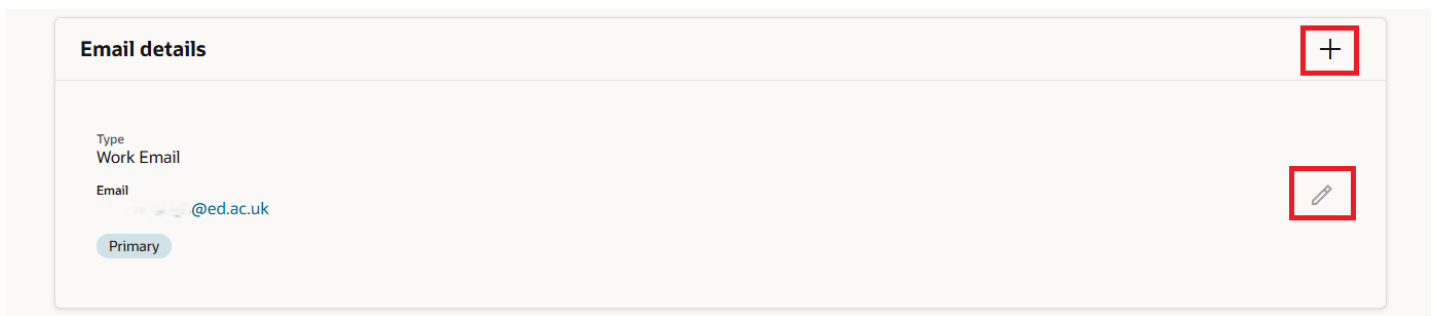
3. Click **Save**.

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).

Email details

Type

Required

Email

Required

Primary

Comments

Save Comment

Drag and Drop

Select or drop files here.

URL

Add URL

Cancel

Save

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

Address

Type

Home Address

Address

Start Date

Primary

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

Start Date
16/02/2026

Address Line 1

Address Line 2

Address Line 3

City or Town

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**.

THE UNIVERSITY of EDINBURGH

Good morning,

Me My Client Groups Knowledge Help Desk Tools Guaranteed Hours

QUICK ACTIONS

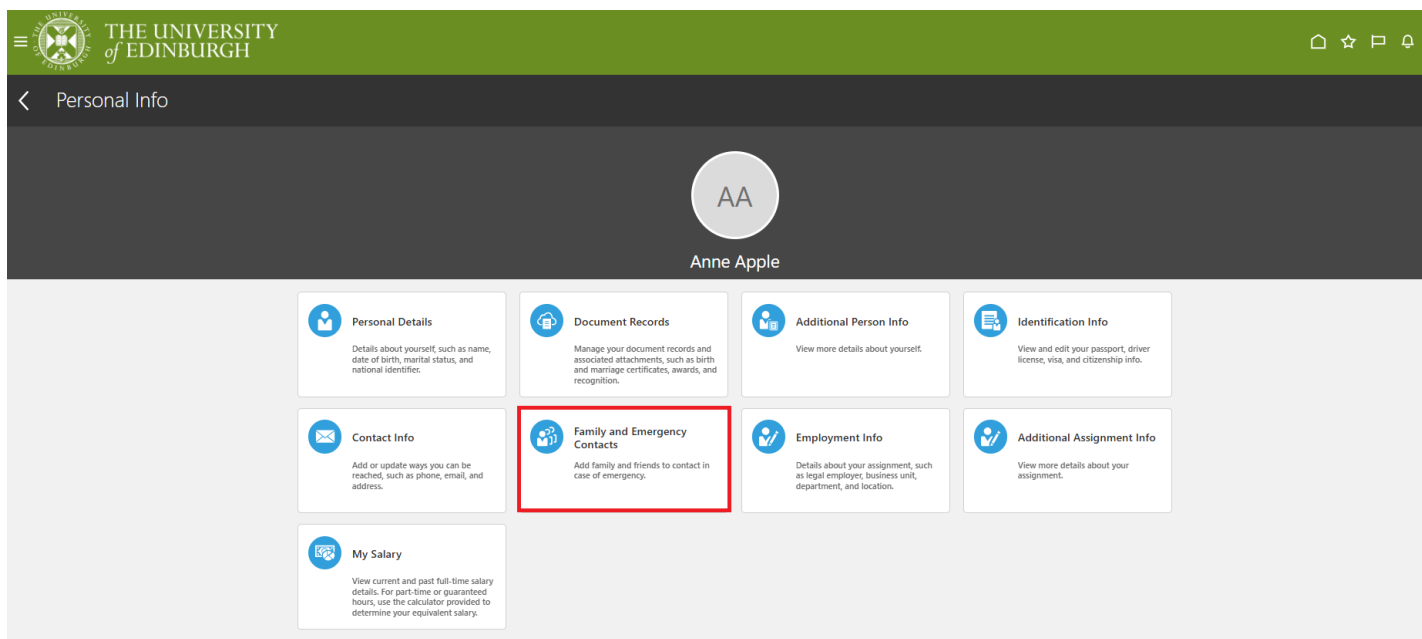
- My Salary
- Additional Person Info
- Personal Details
- Identification Info
- Contact Info
- Family and Emergency Contacts
- My Organization Chart
- My Public Info

APPS

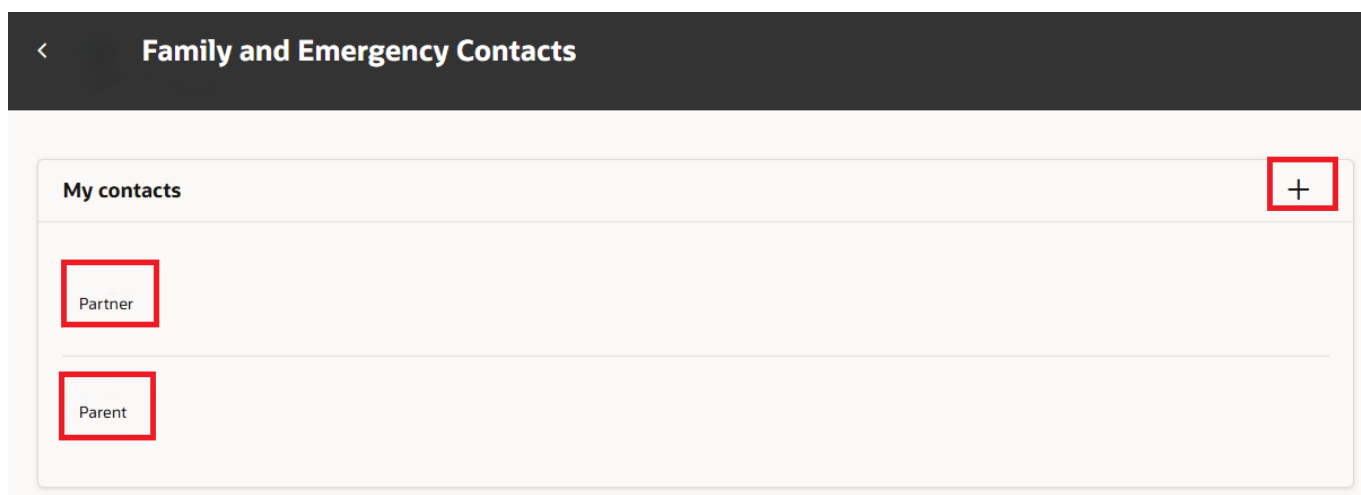
- Directory
- Journeys
- Pay
- Time and Absences
- Skills and Qualifications
- My Activity Center
- Learning
- Current Jobs
- Expenses
- Skills and Qualifications
- Maternity Calculator
- Annual Review Record

Personal Information

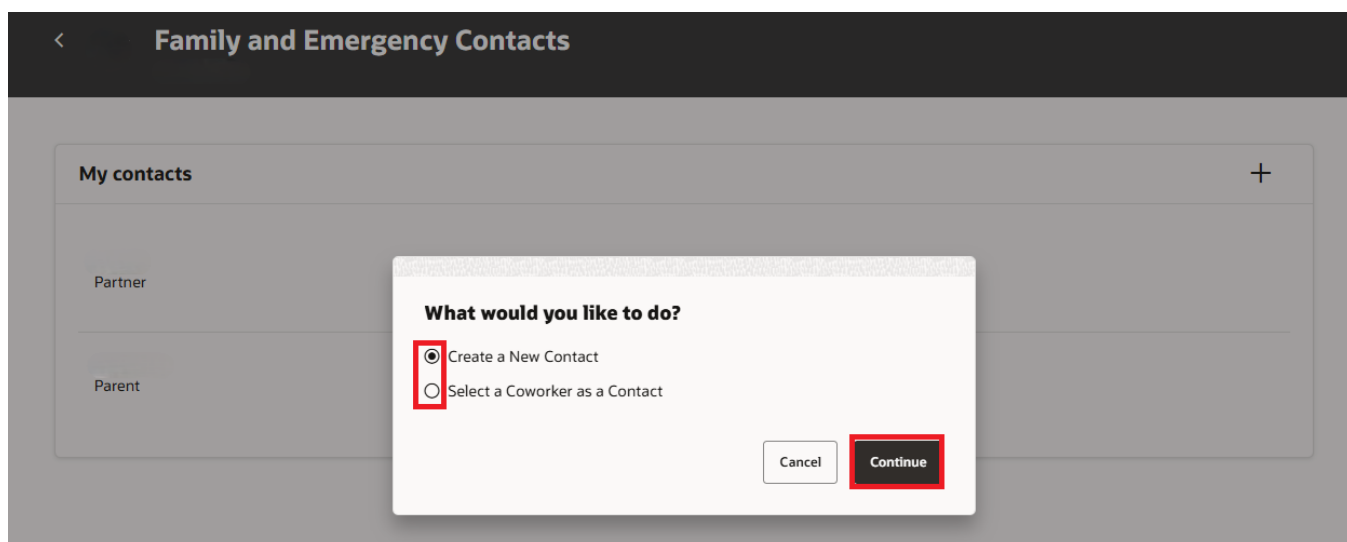
2. Click **Family and Emergency Contacts**.



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

CancelSubmit

Basic info

Global Name

TitleRequired

First NameRequired

Preferred NameRequired

Middle Name

Last NameRequired

Relationship

RelationshipRequired

What's the start date of this relationship?Required

This person is an emergency contact☐

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

CancelSubmit

Basic info

Global Name

Title

Required

First Name

Required

Preferred Name

Required

Middle Name

Last Name

Required

Relationship

Relationship

Required

What's the start date of this relationship?

Required

This person is an emergency contact

Phone details

Country

Email details

Type

Address

☒ Use My Address☐ Enter a New Address

Select a value

Version History

Version	Date	Description	Approved By
1.0	04 August 2025	- 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	Updated for 26A – added tip for comments and attachments	RM/HH 17/02/2026
1.2	22 September 2026	Clarity on phone numbers	RM

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.

Page **13** of **13**

PM1135
26C v1.2 September 2026