



People and Money system

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Line Manager/School/PSG Admin Guide- How to change location

Line manager/School/PSG Admin

Estimated time to complete: 12 minutes

In Brief...

This is a simple overview of the process.

1. From the Dashboard, select the **My Team** section and then select **Show More** under **Quick Actions**
Note: School/Department Admins should select **My Client Groups** in the first instance
2. In the Employment section, select **Change Location**
3. In the search box that appears **search** for the team member whose location you would like to change or **select** them from the list of Direct Reports that will be displayed below
4. In the **When and Why** box, select the:
 - a. **Date** on which the location change starts based on the hint provided
 - b. **Reason** for changing location from the dropdown menu

To see all the available reasons, see the [Appendix](#)

Then press **Continue**



5. In the Location box, to change location select from the dropdown list
6. Hit **Submit**

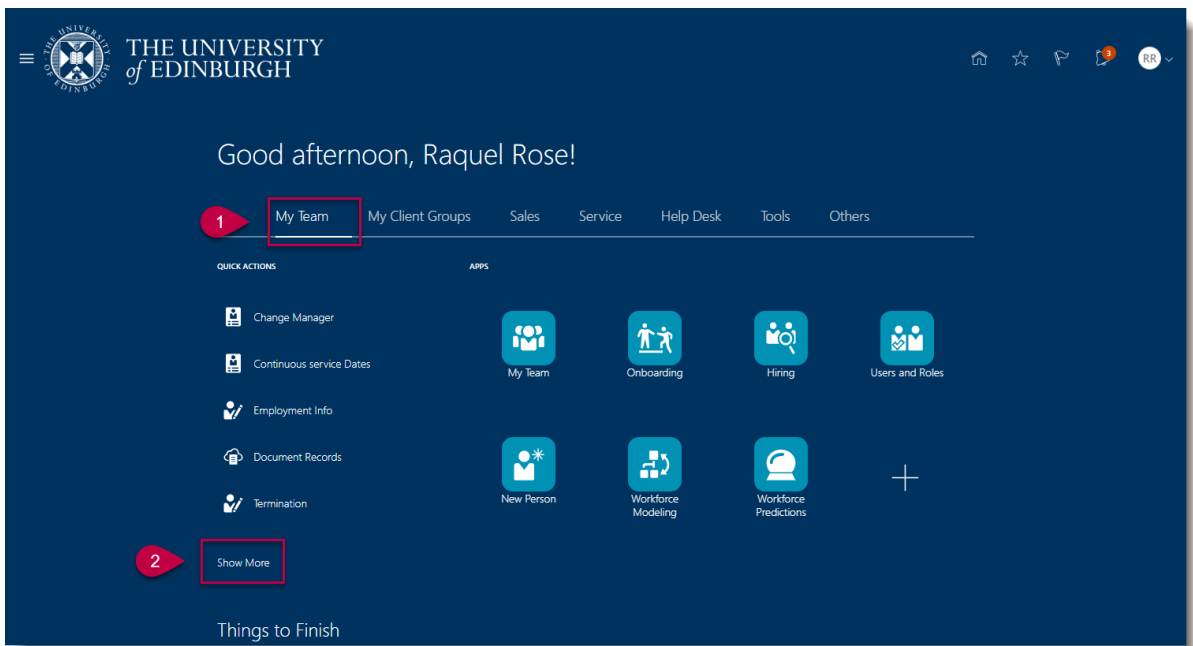


For detailed guidance, see the next section.

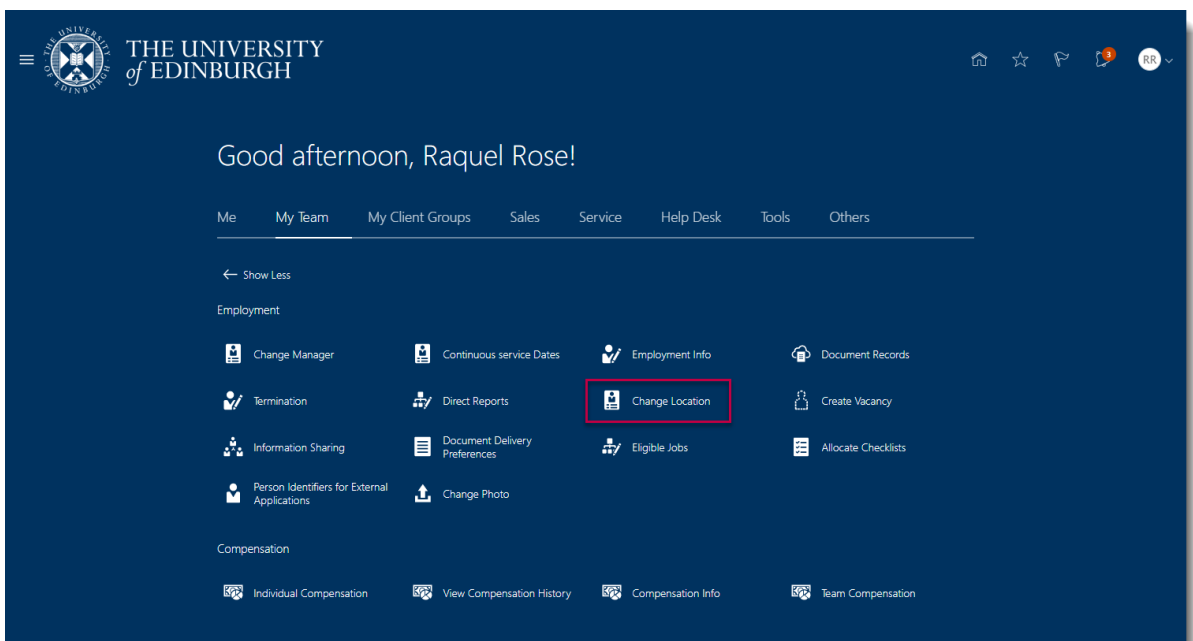
In Detail...

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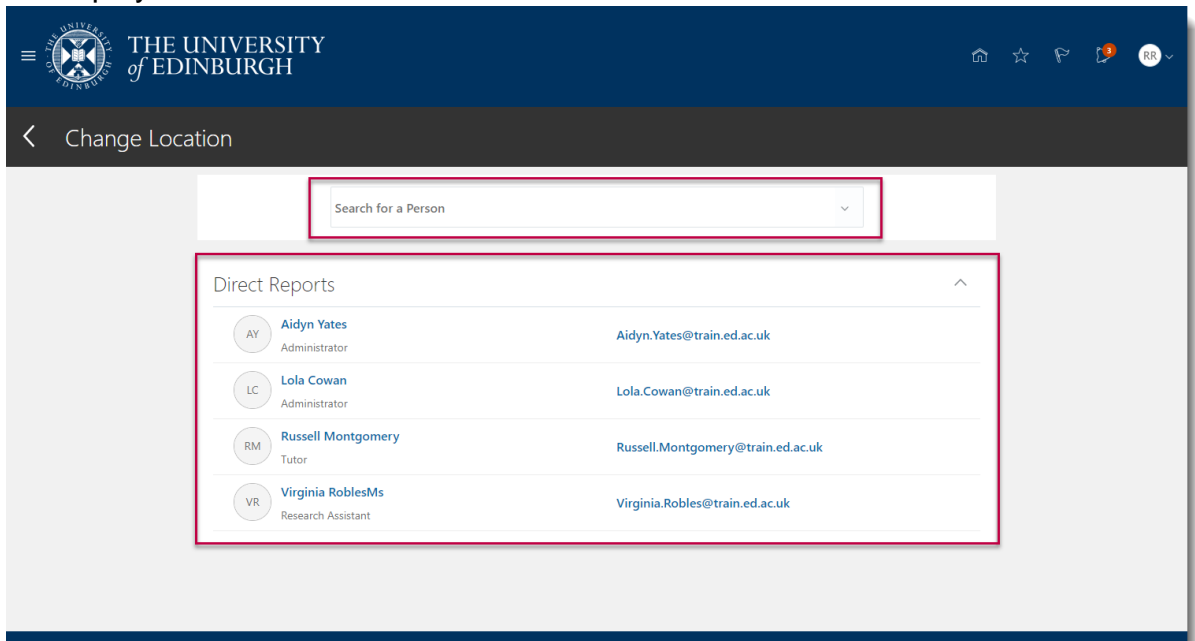


2. In the Employment section, select **Change Location**

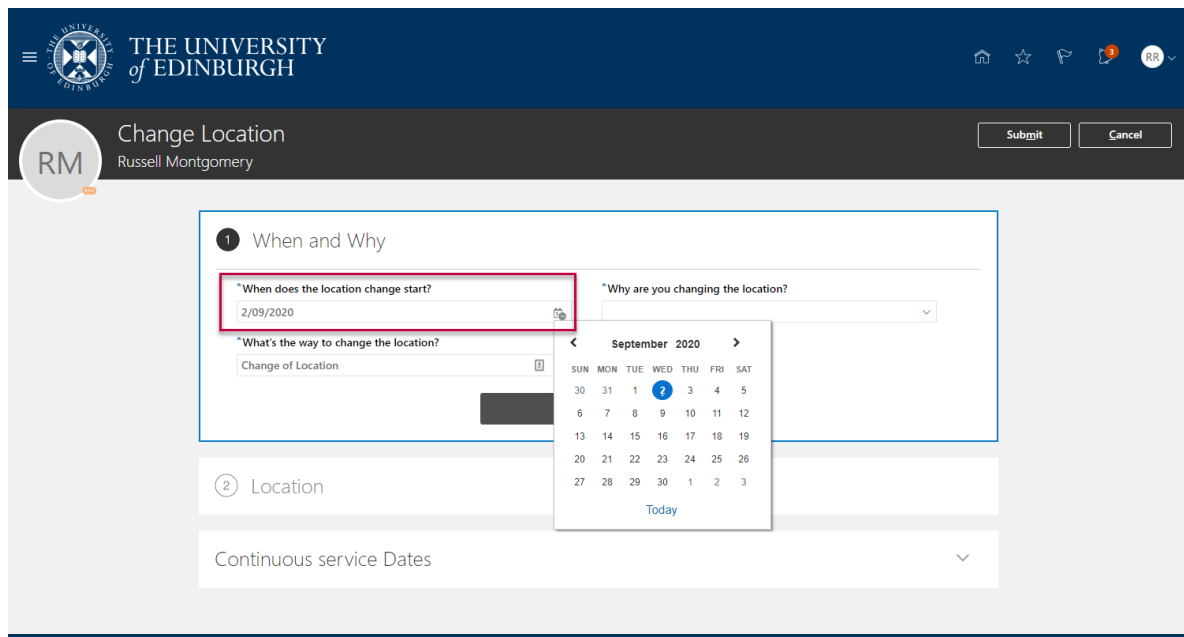


3. In the search box that appears **search** for the team member whose location you would like to change or **select** them from the list of Direct Reports that will

be displayed below



4. In the **When and Why** box, select the:
 - a. **Date** on which the location change starts based on the hint provided



b. Reason for changing location from the dropdown menu

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RM Change Location Russell Montgomery

Submit Cancel

1 When and Why

*When does the location change start?
7/10/2020

*Why are you changing the location?
Reason
Department Move
Employee Working From a Different Location
Outcome of Restructure

Continue

2 Location

To see all the available reasons, see the [Appendix](#)

5. Then press **Continue**

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RM Change Location Russell Montgomery

Submit Cancel

1 When and Why

*When does the location change start?
7/10/2020

*Why are you changing the location?
Department Move

Continue

2 Location

6. In the Location box, to change location, start **typing** the desired location into the drop down box by way of searching and options will appear

The screenshot shows the 'Change Location' form for Russell Montgomery. The 'Location' field is active, and a search dropdown menu is displayed. The dropdown menu has a search bar containing 'Chancellors Bldg LF' and a list of location options:

Name	Code	City or Town	Country Name
1-13 Buccleuch Place	5213	Edinburgh	United Kingdom
1-7 George Square	5204	Edinburgh	United Kingdom
1-7 Roxburgh Street	5218	Edinburgh	United Kingdom
12 Buccleuch Street	5305	Edinburgh	United Kingdom
12 Infirmary Street	5165	Edinburgh	United Kingdom

7. Hit **Submit**

The screenshot shows the 'Change Location' form for Russell Montgomery. The 'Location' field now displays 'Chancellors Bldg LF' as the selected option. The 'Submit' button is highlighted with a red box, indicating the next step in the process.

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.

Glossary

Please refer to Glossary

Reasons for changing location:

Reason	When to use this reason
Department Move	When the employee's department has moved to a new location
Employee Working From a Different Location	When the employee is working from a different location
Outcome of Restructure	When there's been a departmental restructure