THE UNIVERSITY of EDINBURGH

People and Money system

We know this format may not be accessible for all. To request this guide in a different format please email or call hrhelpline@ed.ac.uk.

School or Department Admin Guide- How to Search, View and Upload Employee Data

School or Department Admin

Estimated time to complete: 4 minutes

Assumed Knowledge:

1. School/PSG admin undertakes a check of the passport/visa documentation, takes a copy and verifies.

In Brief...

Searching and Viewing Employee Data

1. From the **Home** page, click the **Navigator** menu icon located at the top left.
2. Open **My Client Groups** then click **Person Management**

3. Search for the employee, click on the **Name** link and their **Employment** page opens.
4. Click on the **Task** icon and select the applicable menu option to view the details.

For detailed guidance, see the next section.

Uploading Employee Data

1. From the **Home** page, click the **Navigator** menu icon located at the top left.

2. Open **My Client Groups** then click **Person Management**

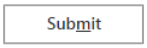
3. Search for the employee, click on the **Name** link and their **Employment** page opens.

4. Click on the **Task** icon and select **Document Records**.

5. Click on the **Add** button in the **Document Records** page.

6. Select the **Document Type** and complete the online form.

7. Upload the document in the **Attachments** section and click **Submit**

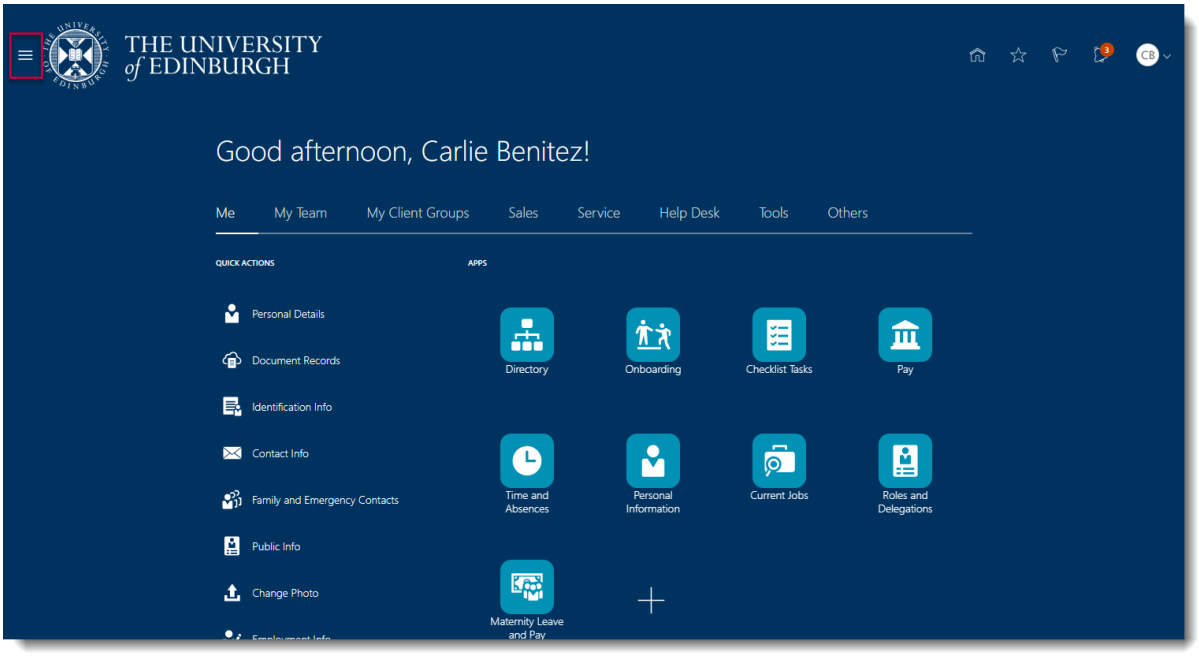


For detailed guidance, see the next section.

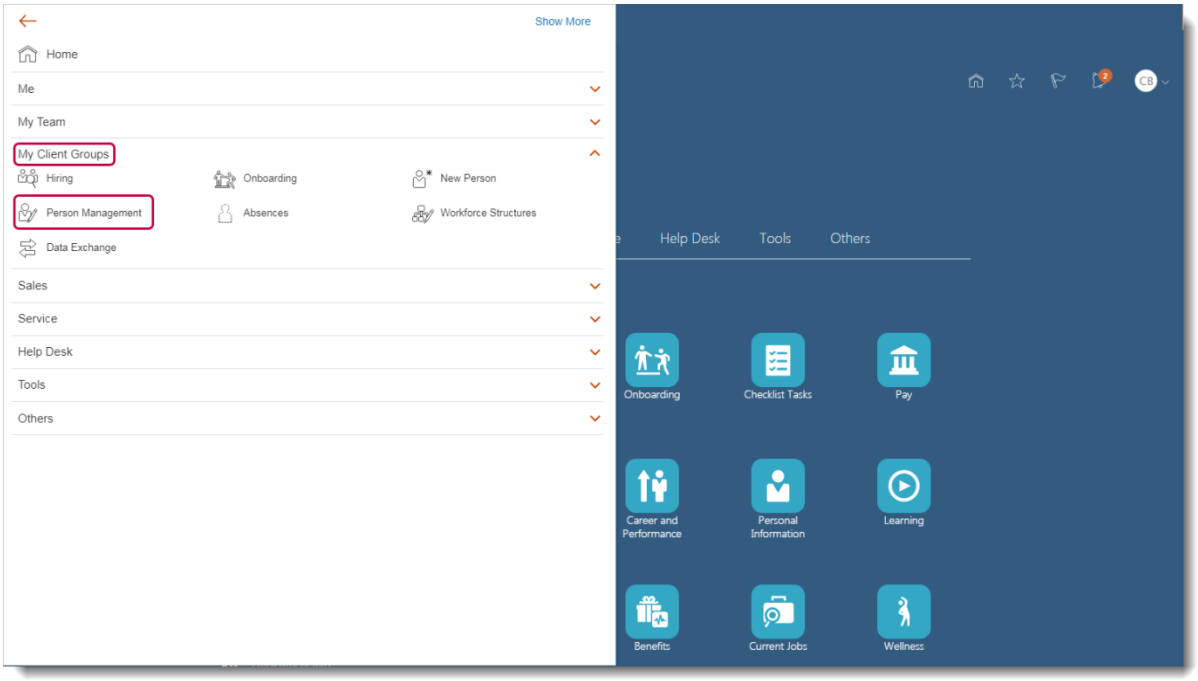
In Detail...

Searching and Viewing Employee Data

1. From the **Home** page, click the **Navigator** menu icon located at the top left.



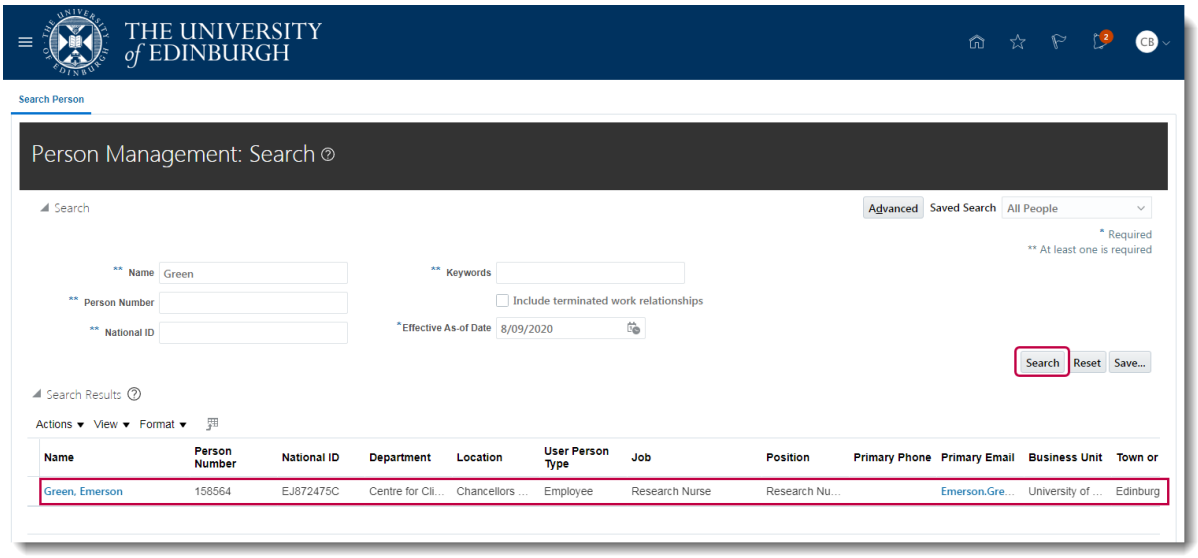
2. Open **My Client Groups**, and click **Person Management**.



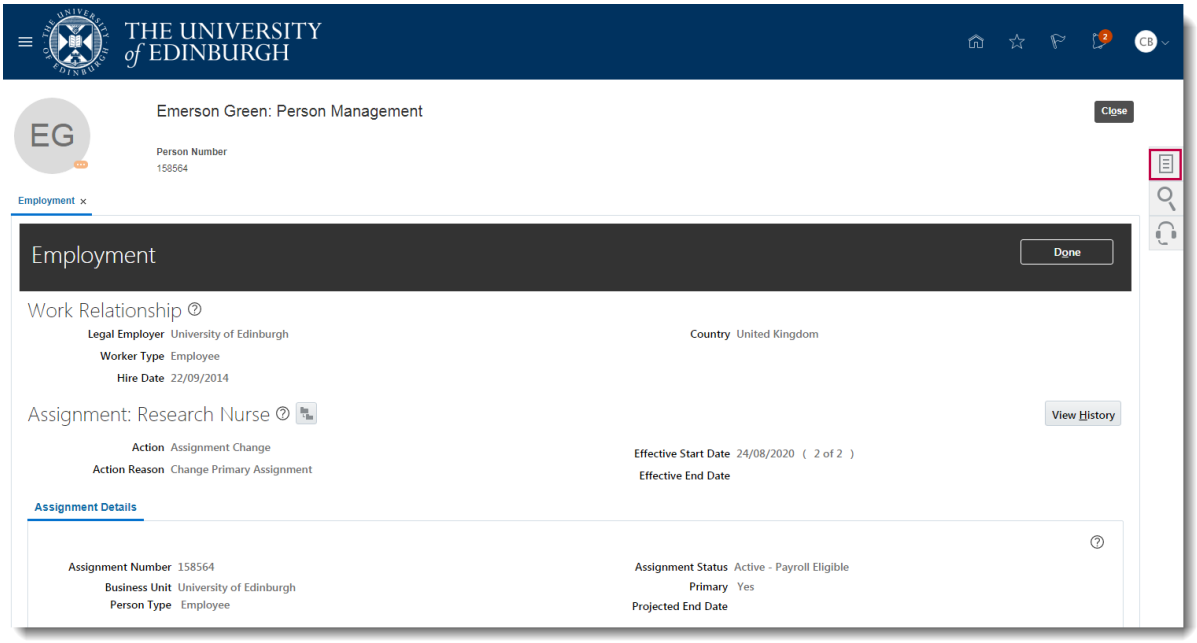
3. In the **Person Management: Search** page, complete one or more the fields and press the enter key or click the **Search** button.

   Matching results appear below the search fields.

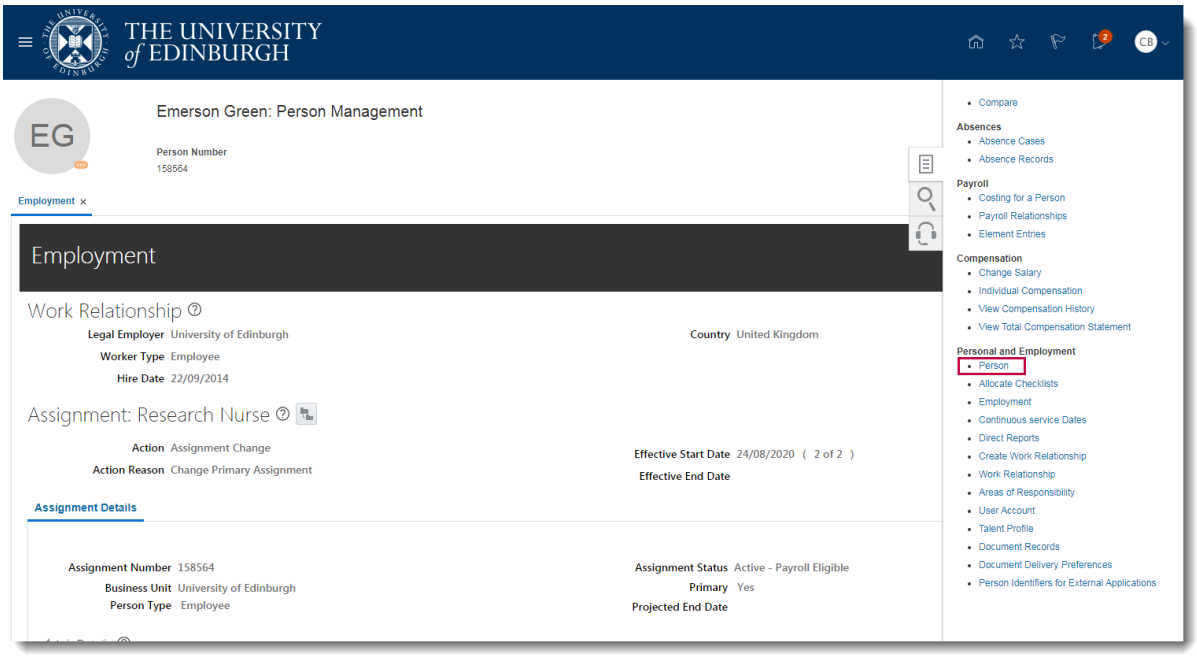
4. Click on the employee's link in the **Name** column and their employment information can be viewed in the **Employment** page.



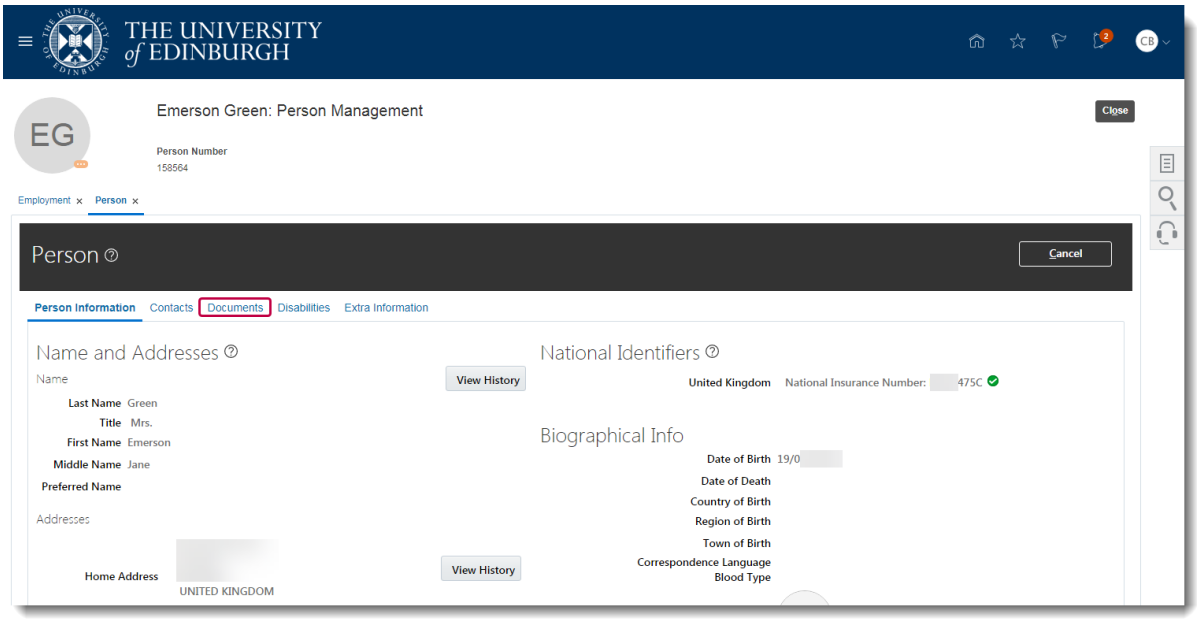
5. To view other information about the employee, click on the **Task** icon to open the navigation menu.



6. Select a menu option, eg.to view the employee's personal information, click on **Person** in the menu.

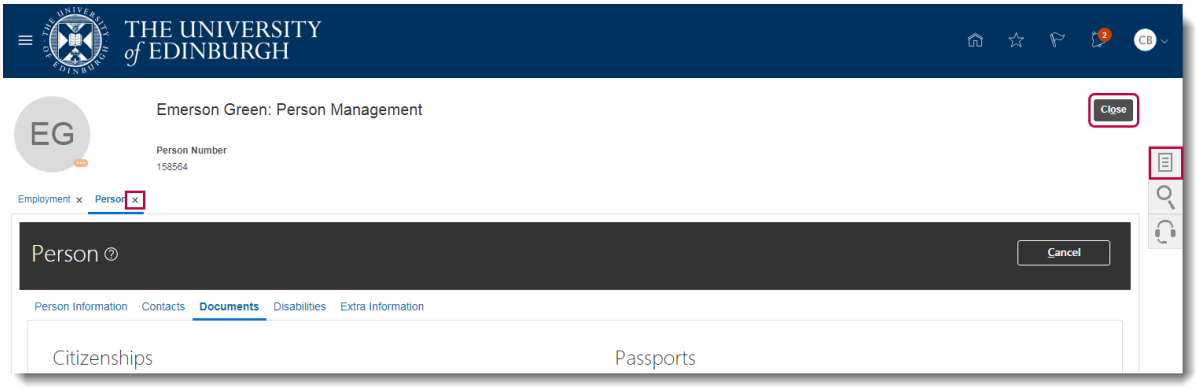


7. If the page contains several subpages, click on a tab to navigate to other information which opens in a new page.



8. After you have viewed the desired information, you can either:

    a. Close the page by clicking on the small cross next to the page tab.
    b. Click on the **Task** icon and select another menu option.
    c. Click the **Close** button in the top part of the page and reopen the **Person Management: Search** page to find another employee.



Uploading Employee Data

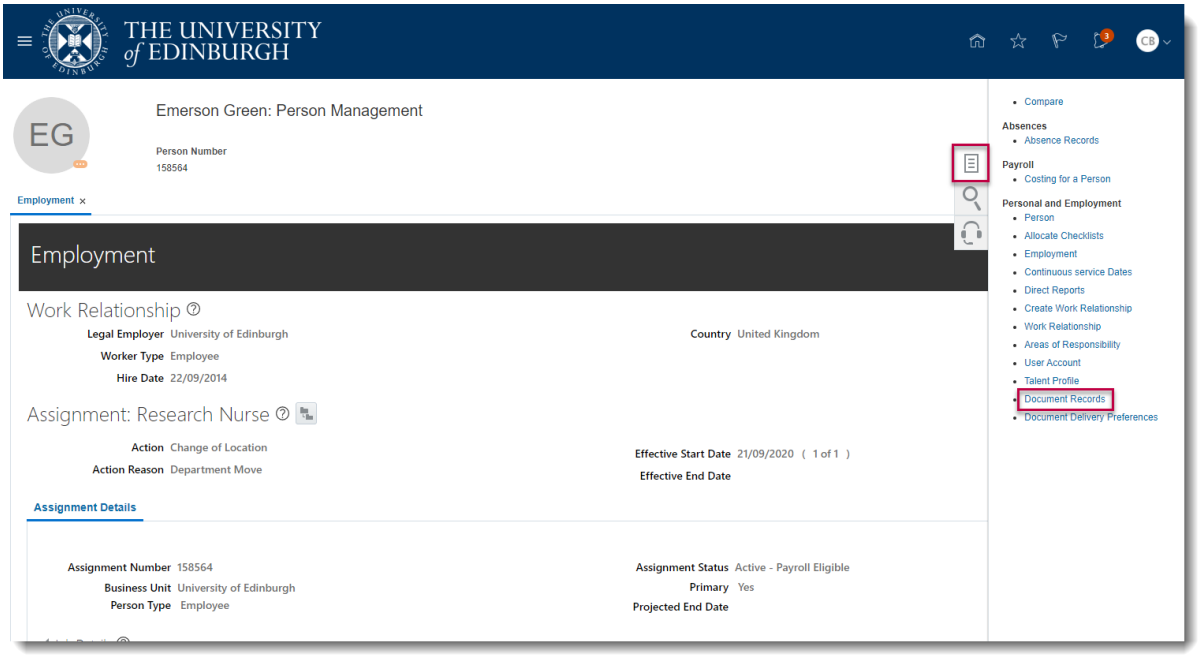
1. From the **Home** page, click the **Navigator** menu icon located at the top left.

2. Open **My Client Groups**, and click **Person Management**.

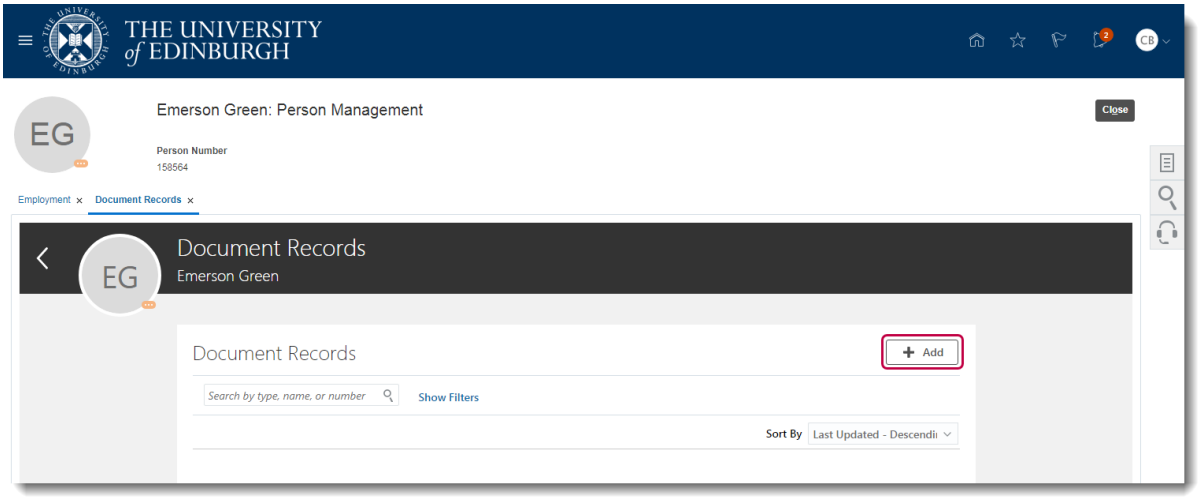
3. In the **Person Management: Search** page, complete one or more the fields and press the enter key or click the **Search** button. Matching results appear below the search fields.

4. Click on the employee's link in the **Name** column and their **Employment** page opens.

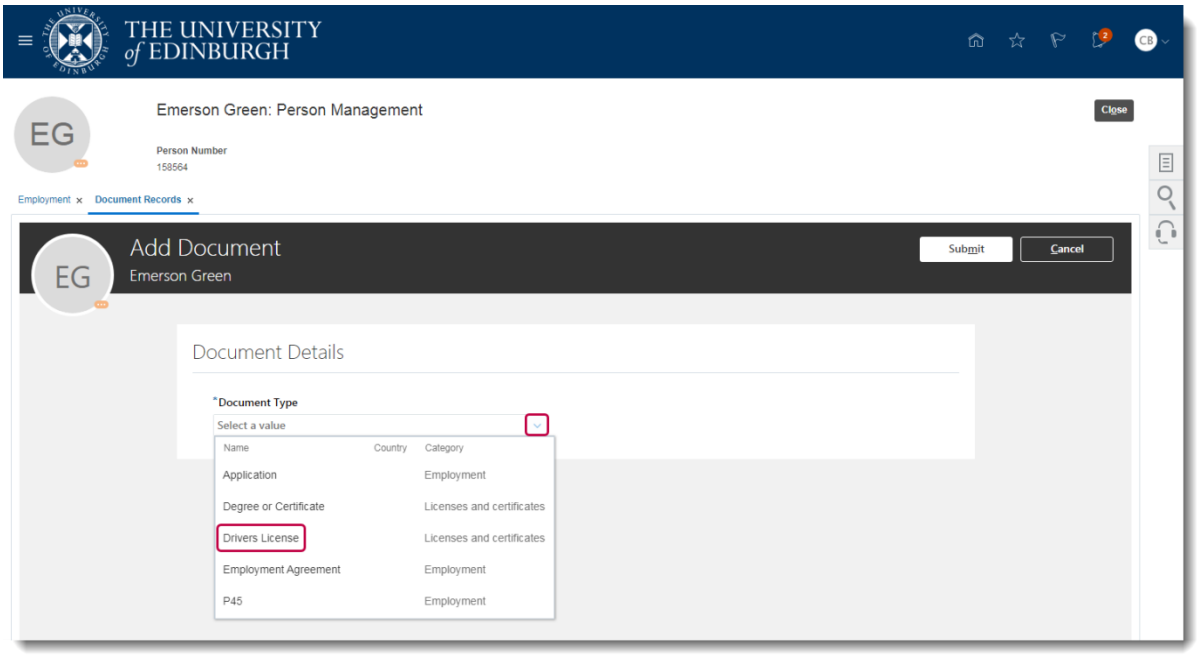
5. Click on the **Task** icon to open the navigation menu and select **Document Records**.



6. To upload documentation for the employee, click on the **Add** button in the **Document Records** page.

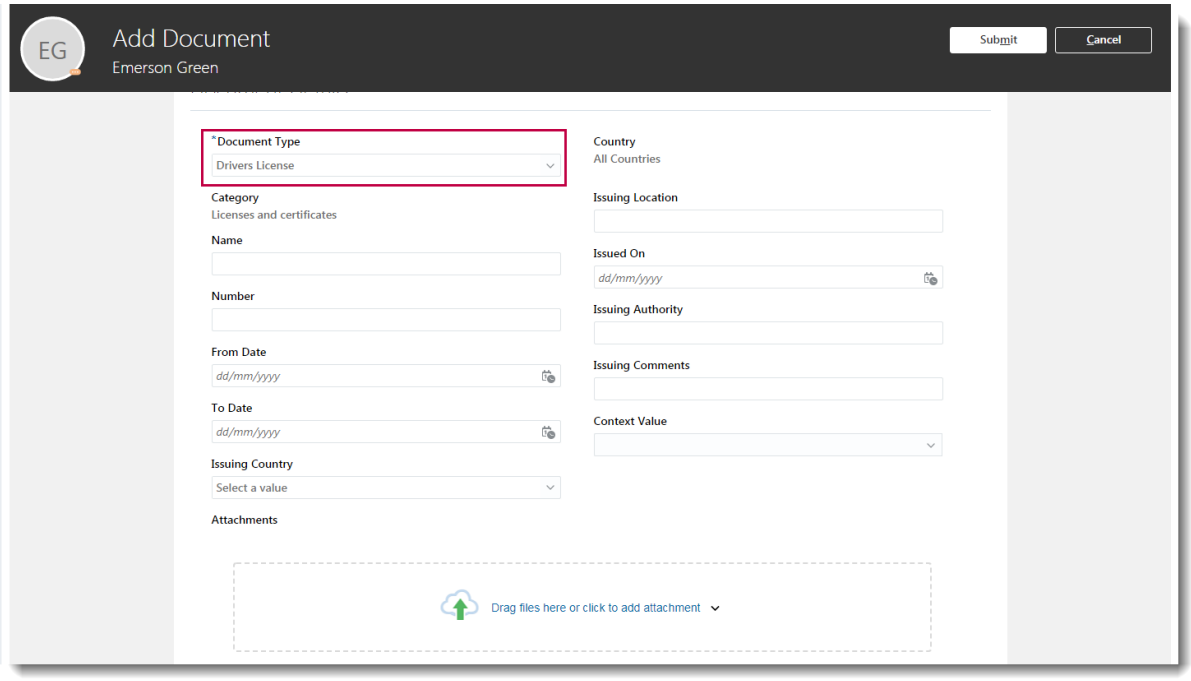


7. In the **Add Document** page, click on the down arrow in the **Document Type** field and select the applicable document from the list, eg. “Drivers License.”



For a list of all the documents available for a School/Dept admin to view and upload, check the Appendix.

8. Complete the fields in the online form and with the relevant details.



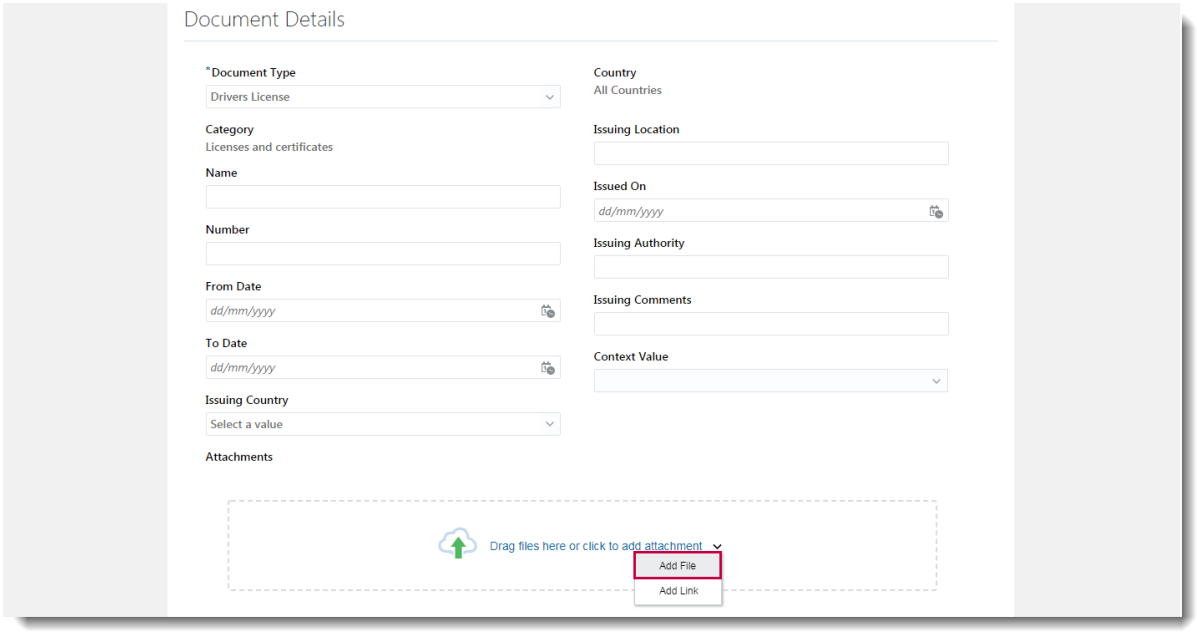
Note:

a. **Ignore** the **Context Value** field.

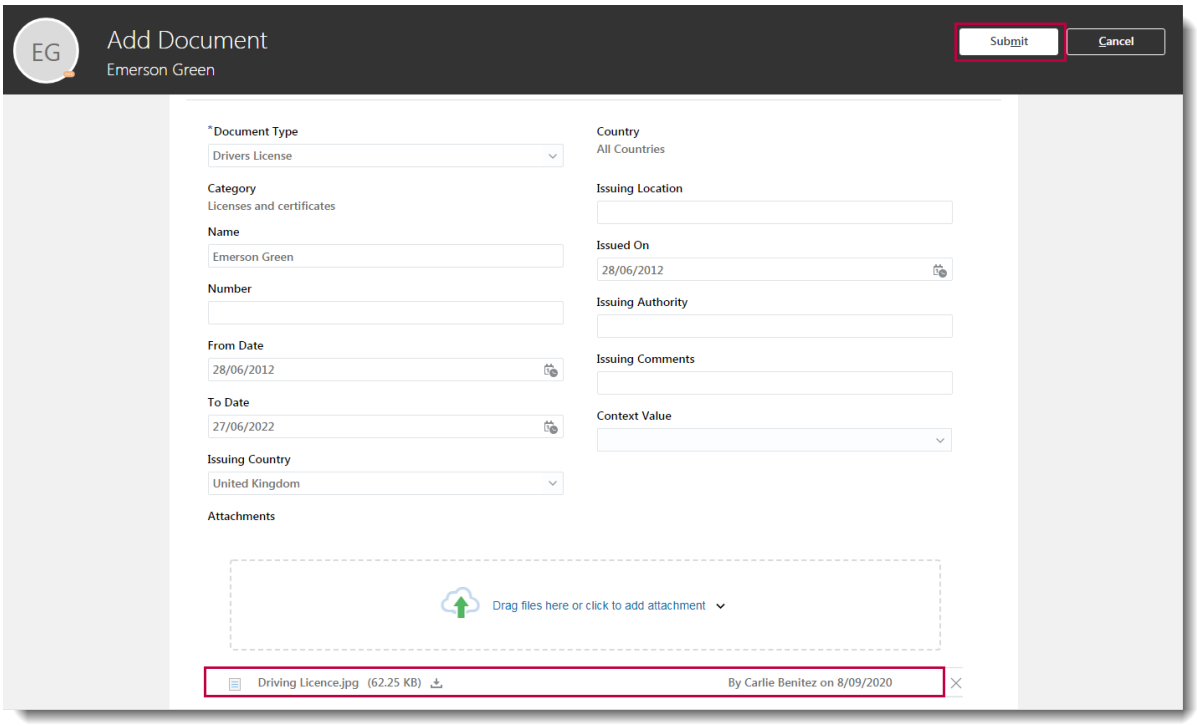
b. The **Name** and **From Date** fields appear for all Document Types but **Issued On** does not. Only complete the fields that appear.

c. The **From Date** is the date the document was uploaded and the **Issued Date** is the date the document was issued.

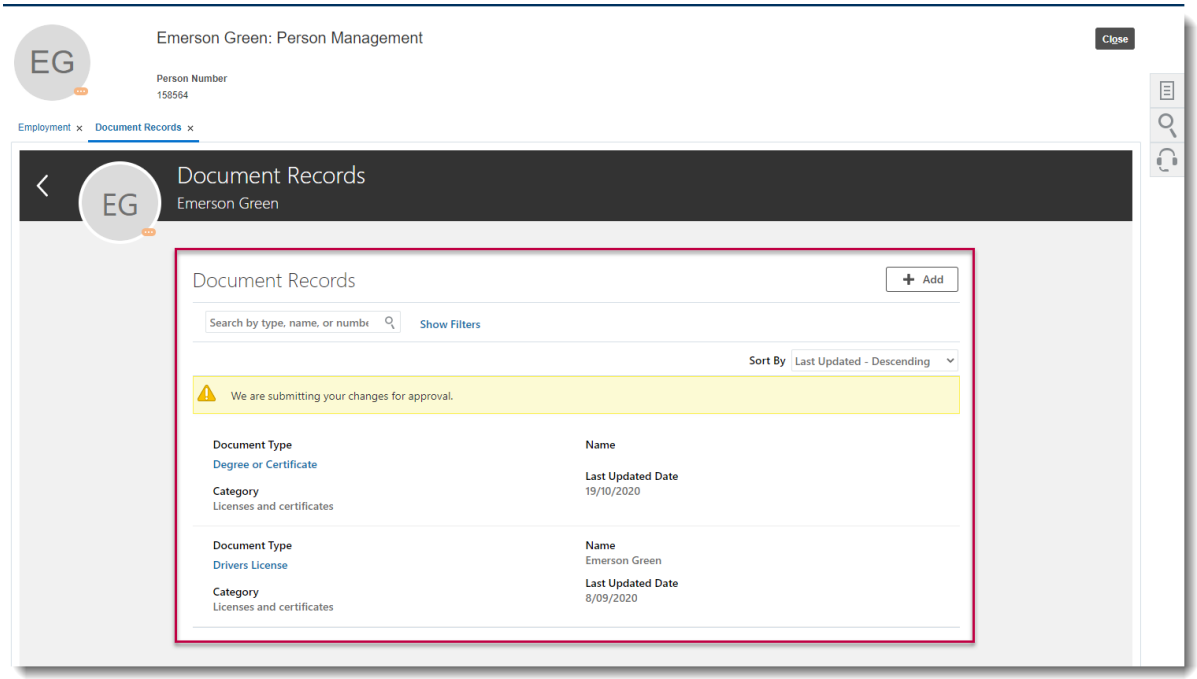
9. To upload a document, click on the down arrow next to **Drag files here** or **click to add attachment** in the **Attachments** section, and select **Add File**.



10. Navigate to the location where the document is stored, select it and the document name appears in the **Attachments** section.



11. Click **Submit** and the **Document Records** page opens with details of the uploaded document type and a message saying ‘We are submitting your changes for approval’.



12. To upload another document for the employee, click the **Add** button and repeat steps 6 to 11. If not, return to the Homepage by clicking on the **Home** icon on the top right banner.

Glossary

Please refer to Glossary

Appendix

Documents available to School/Dept admin for viewing and uploading:

Document Type	Description
Right to work documents	Evidence of legal right to work in the UK
Casual worker - Right to work documents	Evidence of legal right to work in the UK
P45	Details of employee leaving work
Degree or Certificate	Qualification
Drivers licence	Driving licence
Application	Application
Recruiting	Recruiting
Recruiting Job Offer Letters	Job Offer
Employment agreement Relocation - Repayment terms - Visa Loan terms	Contract of Employment Repayment terms - Visa Loan terms
Relocation - Relocation repayment agreement	Repayment terms - Relocation repayment agreement - Partner career transition repayment agreement
Resignation Letter	Resignation Letter