People and Money system

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

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

Before You Start

This guide covers how to search, view and upload documents to Document Records in People and Money.

A School/Department Administrator (SDA) can only add/upload selected file types. For more details, please see the appendix.

- All SDAs should familiarise themselves with the Guide to Employee Files. This can be found on the People and Money user guides page under the heading Personal Data Maintenance.
- Do not remove any documents that have previously been added to an employee's record.
- Some document records 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...

Searching and Viewing Employee Data

1. From the Home page, click on My Client Groups

2. Under the Apps section, click on Person Management
3. Search for the employee, click on the **Name** link and their **Employment** page opens.

4. Click on the **Task** icon on the right and which allows you to select a menu option to view employee data. For example, to view employee documents, click on **Document Records**.

For detailed guidance, see the **Searching and Viewing Employee Data** section.

**Uploading Documents to an Employee’s Document Records**

1. From the **Home** page, click on **My Client Groups**.

2. Under the Apps section, click on **Person Management**

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

4. Click on the **Task** icon on the right 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 **Uploading Documents to an Employee’s Document Records** section.

**Searching and Viewing Employee Data**

1. From the **Home** page, click the **My Client Groups** tab.
2. In the Apps section, click **Person Management**.

3. In the **Person Management: Search** page, complete one or more of the fields and 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 will be displayed on the **Employment** page.

5. To view other information about the employee, click on the **Task** icon on the right of the page to open the navigation menu.
6. There are various menu options detailing different aspects of the employee’s personal data. For example, to view an employee’s documents, click on Document Records.

7. 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. View a different subpage within your selected menu option,
   d. Click the Close button in the top part of the page and reopen the Person Management: Search page to find another employee.
Uploading Documents to an Employee’s Document Records

1. From the **Home** page, click on the **My Client Groups** tab.
2. In the Apps section, click **Person Management**.
3. In the **Person Management: Search** page, complete one or more the fields and 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/Department Admin to view and upload, check the [Appendix](#).

8. Complete the fields in the online form 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 **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.

*Some document types, such as Right to Work, will display 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.
Documents available to view or upload for School/Department Administrators (SDA)

There are a number of document types in Document Records that an SDAs can view and upload:

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Description</th>
<th>View or Upload</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree or Certificate</td>
<td>Qualification</td>
<td>View and Upload</td>
</tr>
<tr>
<td>Drivers licence</td>
<td>Driving licence</td>
<td>View and Upload</td>
</tr>
<tr>
<td>Employment agreement</td>
<td>Contract of Employment</td>
<td>View (upload would happen within the recruitment process for any new post)</td>
</tr>
<tr>
<td>Fit Note (Medical Certificate)</td>
<td>Medical Certificate</td>
<td>View (upload would happen within a sickness absence process)</td>
</tr>
<tr>
<td>P45</td>
<td>A document confirming previous employment, tax and national insurance information</td>
<td>View (upload would happen within the recruitment process)</td>
</tr>
<tr>
<td>Recruiting</td>
<td>Recruiting</td>
<td>View (upload would happen within the recruitment process)</td>
</tr>
<tr>
<td>Recruiting Job Offer Letters</td>
<td>Job Offer</td>
<td>View (upload would happen within the recruitment process)</td>
</tr>
<tr>
<td>Relocation - Repayment terms - Visa Loan terms</td>
<td>Repayment terms - Visa Loan terms</td>
<td>View (upload would happen within the recruitment process)</td>
</tr>
<tr>
<td>Right to work documents</td>
<td>Right to work documents</td>
<td>View (upload would happen within the recruitment process)</td>
</tr>
<tr>
<td>Self Certificate (Return to Work)</td>
<td>Self Certificate (Return to Work)</td>
<td>View (upload would happen within the sickness absence process)</td>
</tr>
</tbody>
</table>

The document types below should no longer be used but are still visible for historic purposes

<table>
<thead>
<tr>
<th>Application</th>
<th>Application</th>
<th>View only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual Worker – Right to Work Documents</td>
<td>Casual Worker – Right to Work Documents</td>
<td>View only</td>
</tr>
<tr>
<td>Other Employment</td>
<td>Other Employment</td>
<td>View only</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Relocation – Repayment terms – Partner career transition repayment agreement</td>
<td>Repayment terms – Partner career transition repayment agreement</td>
<td>View only</td>
</tr>
<tr>
<td>Relocation – Repayment terms – Relocation repayment agreement</td>
<td>Repayment terms – Relocation repayment agreement</td>
<td>View only</td>
</tr>
<tr>
<td>Resignation Letter</td>
<td>Resignation Letter</td>
<td>View only</td>
</tr>
</tbody>
</table>