



## People and Money

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### Employee Guide - How to Enter Contact Details into the System

#### Employee




Estimated Time to complete: 8 minutes

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 is a simple overview of the process.

1. From the Home page, click the **Navigator**  menu.
2. Open the **Me** section, then click **Personal Information**  Personal Information
3. Choose **Contact Info**
4. Choose **Communication** then click **Add**  .
5. Enter **Phone Details**, **Email Details** and **Other communication accounts**

6. **Submit**  .

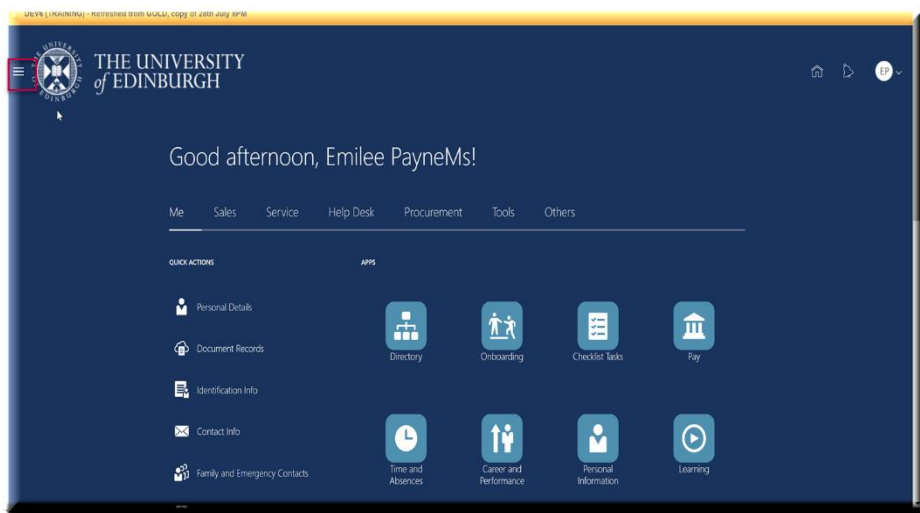
7. Go to **Address**, then choose **Add**  .

8. Enter Address details, then **Submit**  .

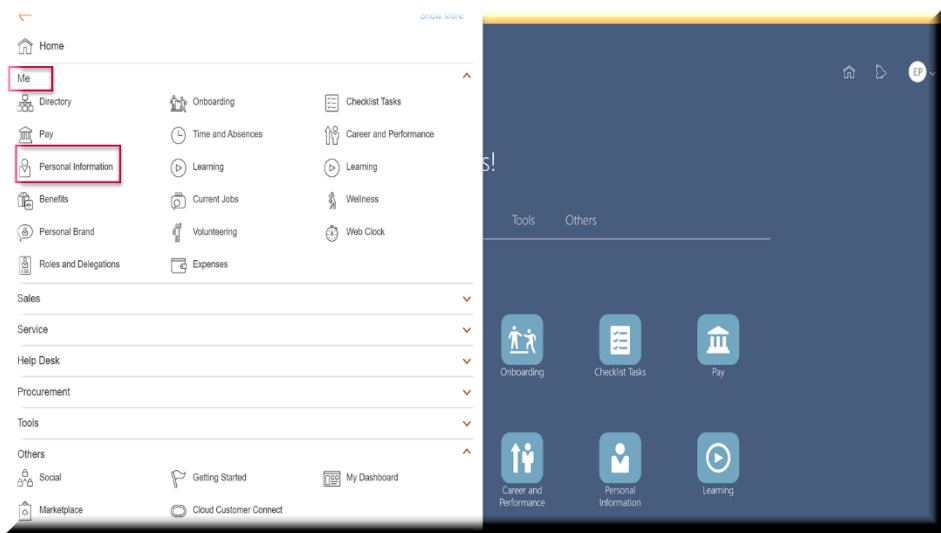
For detailed guidance, see the next section.

## In Detail...

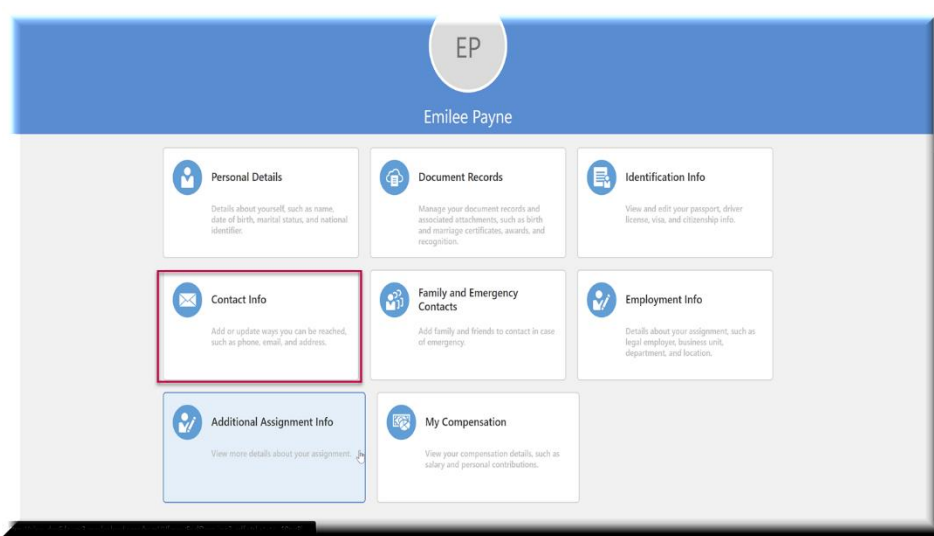
1. From the Home page, click the **Navigator** menu.



2. Open the **Me** section, then click **Personal Information**.

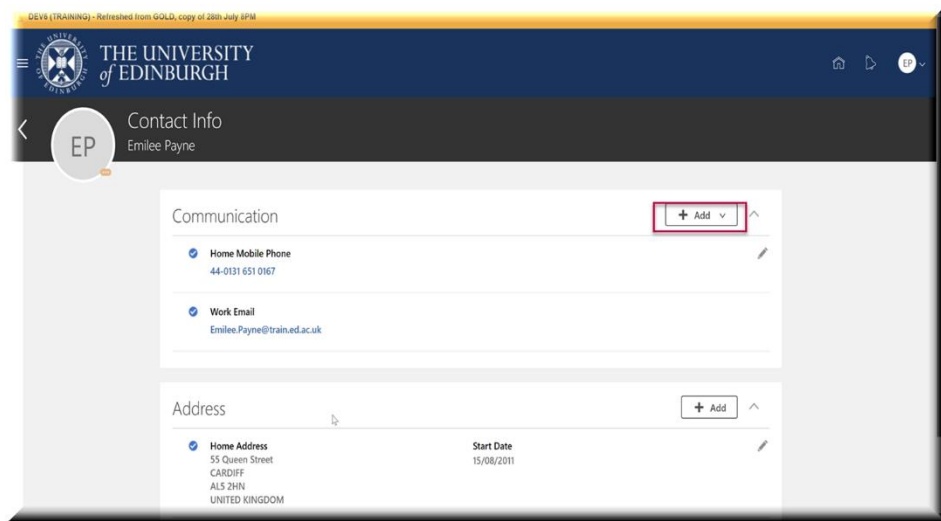


### 3. Choose **Contact Info**.

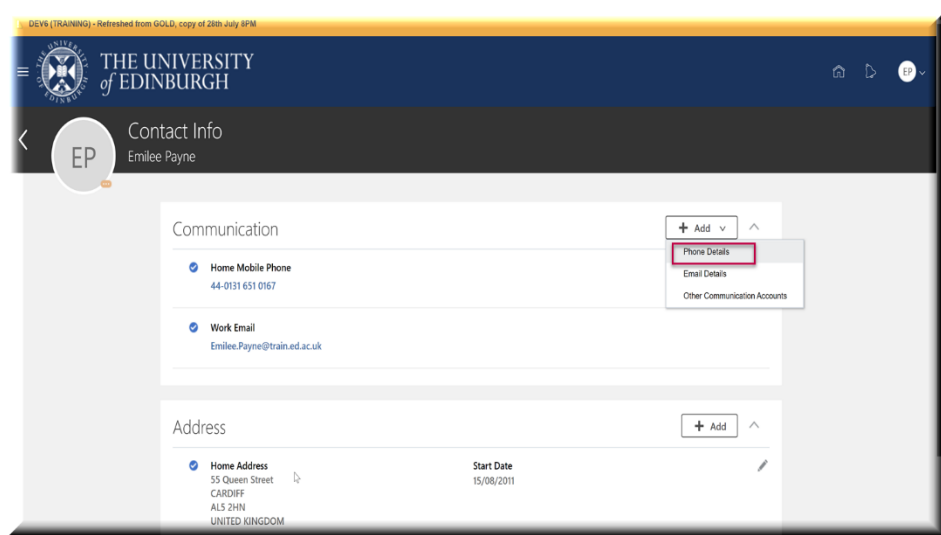


### Phone Details:

1. Choose **Communication** then click **Add**.



## 2. Choose **Phone Details**.



## 3. Enter the following details:

- Type** is a dropdown option – Select as appropriate.
- Country** is a dropdown option – Select as appropriate.
- Area Code** – as appropriate.
- Number** – as appropriate.
- Primary** - Check this box if this is the main phone number.
- Comments** – as appropriate.
- Attachments** – as appropriate (Drag and Drop OR Click and Select).

h. **Submit** to Save.

The screenshot shows a 'Communication' form with the following fields and callouts:

- a**: \*Type (dropdown menu)
- b**: Country (dropdown menu, showing 'United Kingdom 44')
- c**: Area Code (dropdown menu)
- d**: \*Number (text input field)
- e**: Primary (checkbox)
- f**: Comments (text area)
- g**: Attachments (drag and drop area)
- h**: Submit (button)

**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. Choose **Communication** then click **Add**.

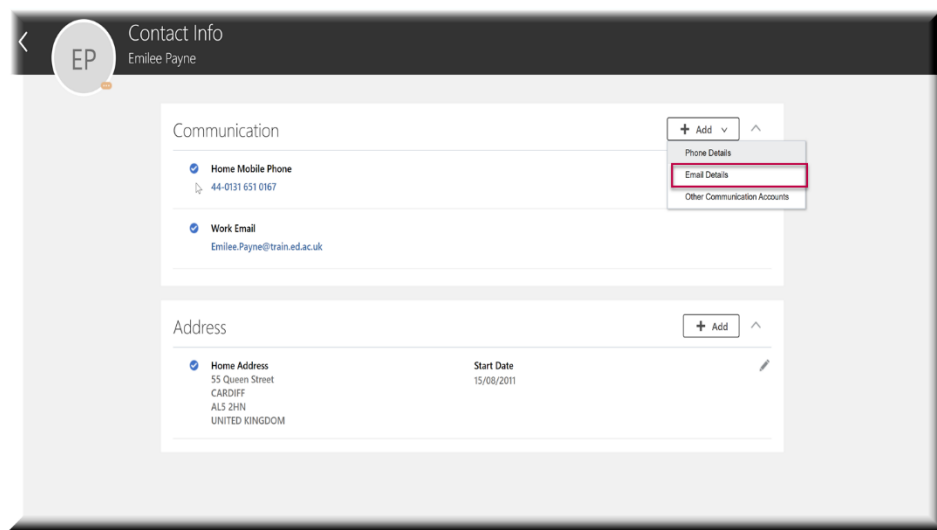
The screenshot shows the 'Contact Info' page for Emilee Payne. The 'Communication' section has an '+ Add' button highlighted with a red box. Below it, there are two entries:

- Home Mobile Phone**: 44-0131 651 0167
- Work Email**: Emilee.Payne@train.ed.ac.uk

The 'Address' section has an '+ Add' button highlighted with a red box. Below it, there is one entry:

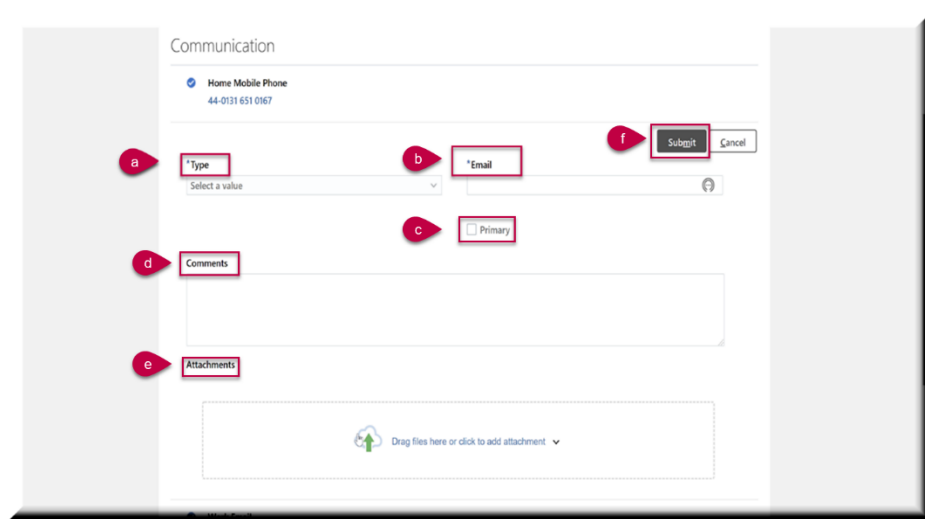
- Home Address**: 55 Queen Street, CARDIFF, ALS 2HN, UNITED KINGDOM. Start Date: 15/08/2011

2. Choose **Email Details**.



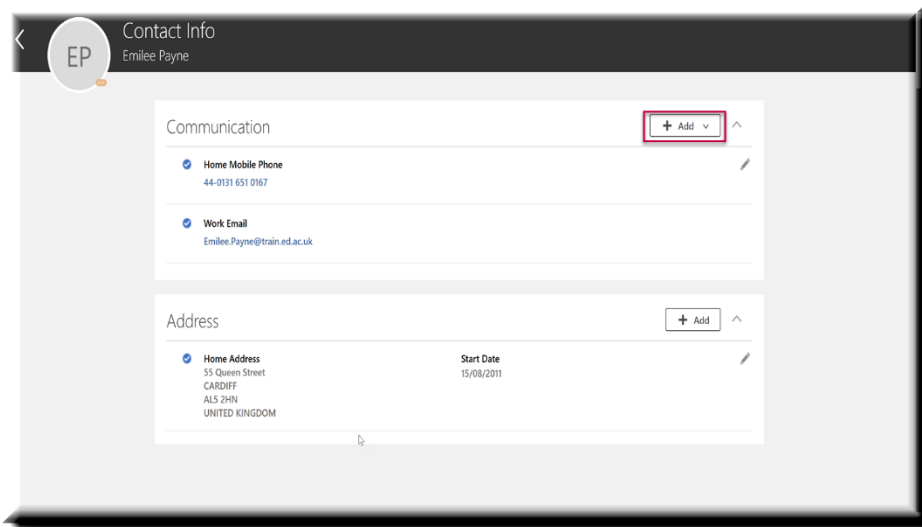
3. Enter the following details:

- a. **Type** is a dropdown option – Select as appropriate.
- b. **E Mail** – as appropriate.
- c. **Primary** - Check this box if this is the main E Mail.
- d. **Comments** – as appropriate.
- e. **Attachments** – as appropriate (Drag and Drop OR Click and Select).
- f. **Submit** to Save.

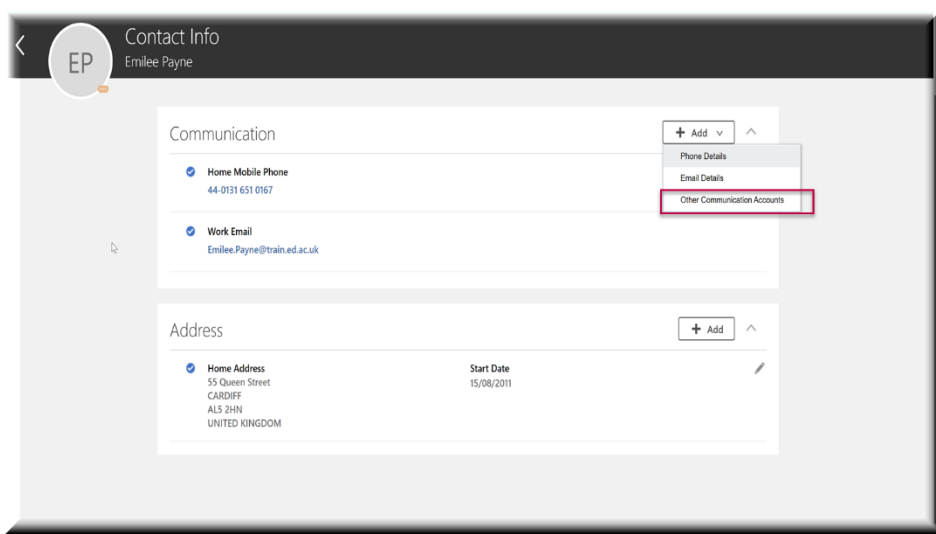


**Other Communication Accounts:**

1. Choose **Communication** then click **Add**.



2. Choose **Other Communication Accounts**.



4. Enter the following details:

- a. **Provider** is a dropdown option – Select as appropriate.
- b. **Account Name** – as appropriate.
- c. **Comments** – as appropriate.
- d. **Attachments** – as appropriate (Drag and Drop OR Click and Select).
- e. **Submit** to Save

## Address

1. Choose **Address**, then click **Add**.

2. Enter the details as below:
  - a. **Country** is a dropdown option – Select as appropriate.
  - 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** - Check this box if this is the main Address.
- k. **Comments** – as appropriate.
- l. **Attachments** – as appropriate (Drag and Drop OR Click and Select).
- m. **Submit** to Save.

The image shows a screenshot of a web form titled "Address". The form contains several input fields and buttons, each labeled with a red circle containing a letter from 'a' to 'm'. The fields are arranged in two columns. The left column contains:
 

- a**: \*Country (dropdown menu, currently showing "United Kingdom")
- b**: \*Type (dropdown menu, currently showing "Select a value")
- c**: \*Start Date (text input, currently showing "6/08/2020")
- d**: \*Address Line 1 (text input)
- e**: Address Line 2 (text input)
- k**: Comments (text area)
- l**: Attachments (text area)

 The right column contains:
 

- f**: Address Line 3 (text input)
- g**: \*City or Town (text input)
- h**: County (text input)
- i**: Postcode (text input)
- j**: Primary (checkbox)

 At the bottom right of the form, there are two buttons: **m**: Submit and Cancel.

## Glossary

Please refer to Glossary