



People and Money

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk

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

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...

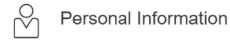
1. There is currently no connection between the People and Money system and the University's telephone/website directories online so if you update your contact details on the system, these won't automatically get updated elsewhere. Please keep in mind to maintain all areas where this info is displayed 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...

Entering Your Contact Details

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

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




3. Choose **Contact Info**

4. In the **Communication** section click **Add**  .

5. Enter **Phone Details** and **Email Details**

6. **Submit**  .

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

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

For detailed guidance, see the [Entering Your Contact Details Section](#).

Entering Your Emergency Contact Details

1. From the Home page open the **Me** section

2. Click **Personal Information**  Personal Information

3. Choose **Family and Emergency Contacts**

4. Click **Add** and **Create a New Contact**

5. Fill out the **Basic Information**, **Communication**, **Address** and add any **Comments and Attachments** for your chosen contact.

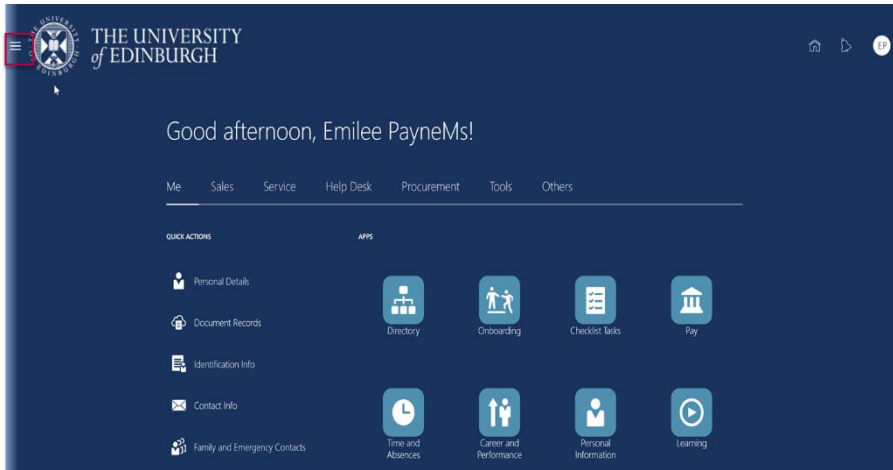
6. Click **Submit**.

For detailed guidance, see the [Entering Your Emergency Contact Details section](#).

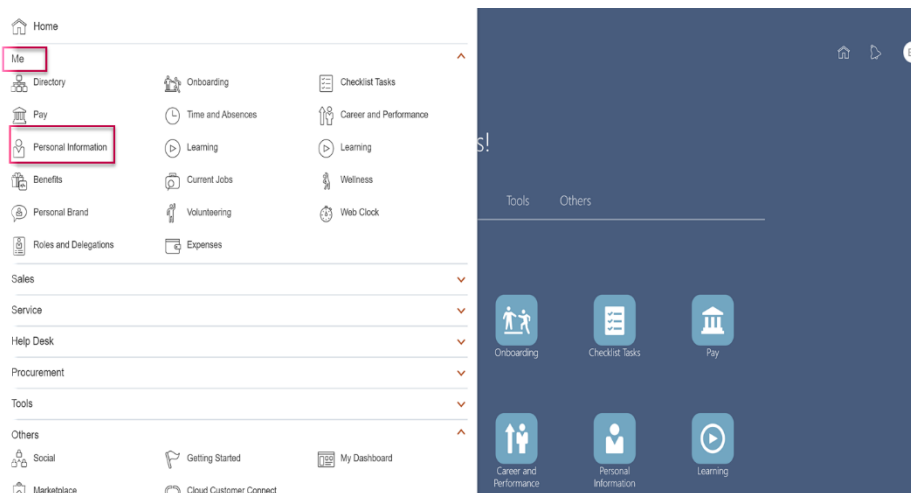
In Detail...

Entering Your Contact Details

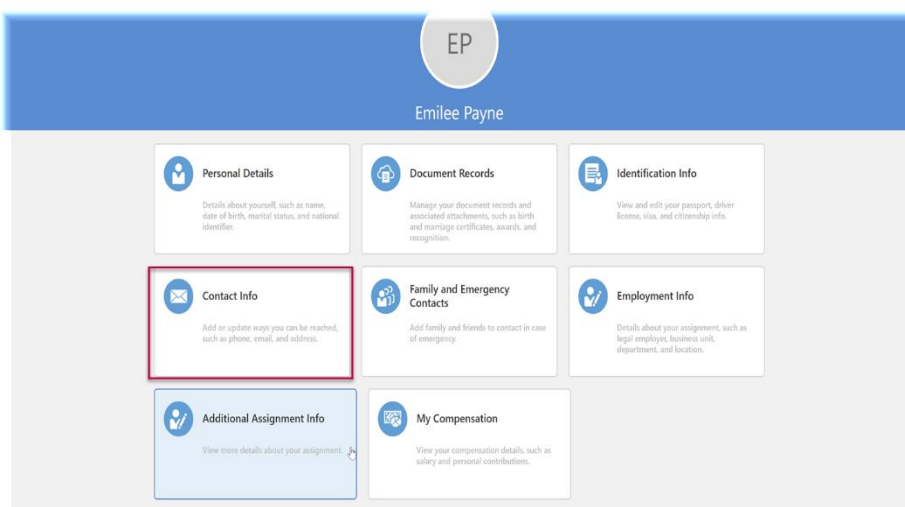
1. From the Home page, click the **Navigator** menu.



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

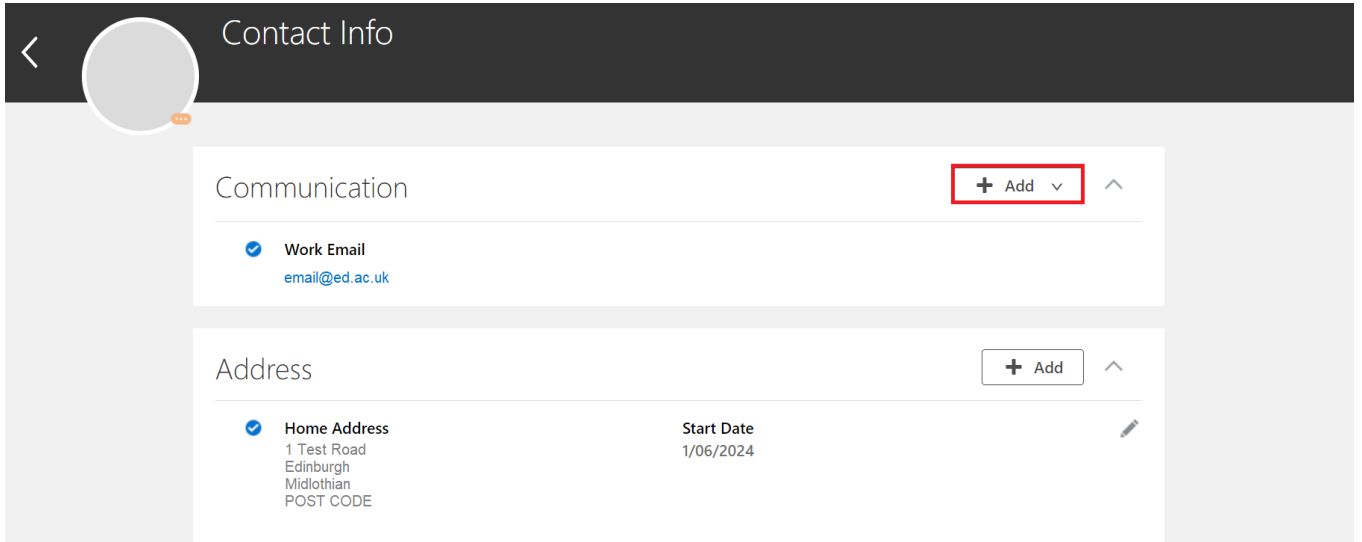


3. Choose **Contact Info**.



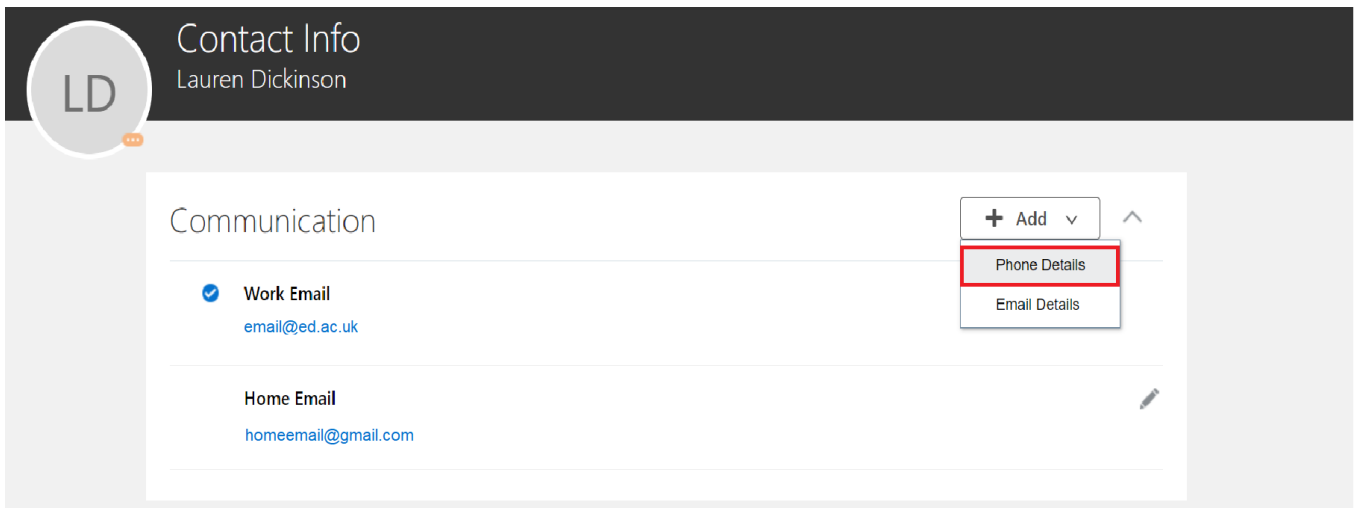
Phone Details:

1. In the **Communication** section click **Add**.



The screenshot shows the 'Contact Info' page for a contact. The 'Communication' section is visible, containing one entry: 'Work Email' with the address 'email@ed.ac.uk'. A '+ Add' button is highlighted with a red box in the top right corner of the 'Communication' section.

2. Choose **Phone Details**.



The screenshot shows the 'Contact Info' page for a contact named Lauren Dickinson. The 'Communication' section is visible, containing two entries: 'Work Email' with the address 'email@ed.ac.uk' and 'Home Email' with the address 'homeemail@gmail.com'. A dropdown menu is open in the top right corner of the 'Communication' section, with 'Phone Details' highlighted in a red box.

3. Enter the following details:

- a. **Country** is a dropdown option – Select as appropriate.
- b. **Type** is a dropdown option – Select as appropriate.
- c. **Area Code** – as appropriate.
- d. **Number** – as appropriate.
- e. **Primary** - Check this box if this is the main phone number.

f. **Comments** – as appropriate.

g. **Attachments** – as appropriate (Drag and Drop OR Click and Select).

Communication


A **Country** **C** **Area Code**

B ***Type** **D** ***Number**

E **Primary**

F **Comments**

G **Attachments**

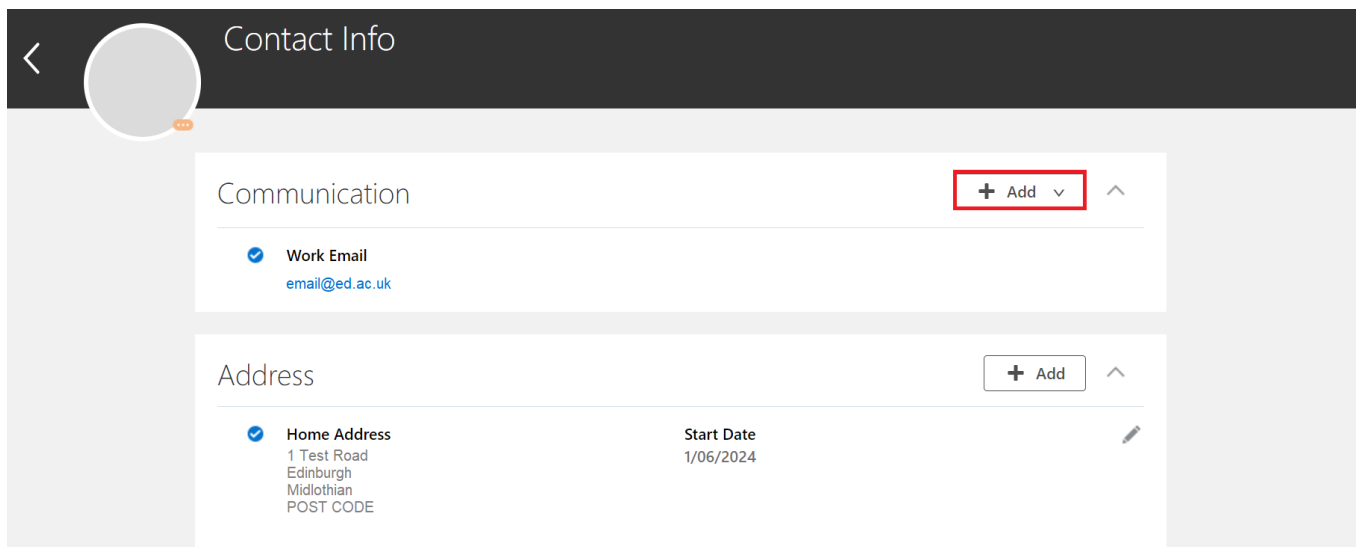
 Drag files here or click to add attachment

4. Click **Submit** to Save.

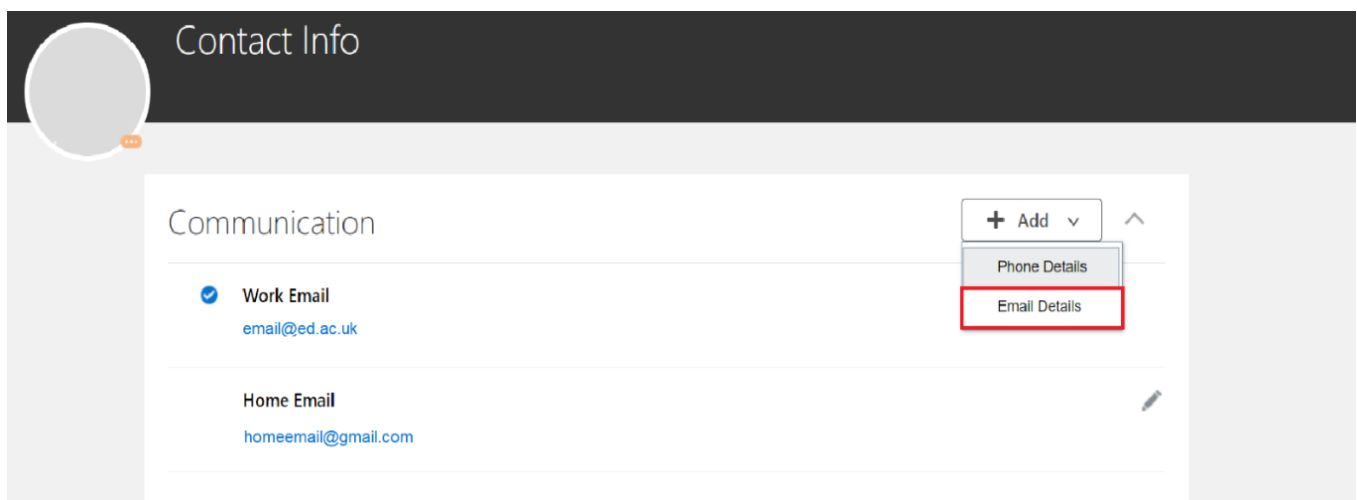
Note: The system must always have a phone contact so if you wish to edit your existing phone number, first add a new one in and only then delete the old one. Otherwise, you won't be able to delete the existing number.

Email Details

1. Under the **Communication** section click **Add**.



2. Choose **Email Details**.



3. Enter the following details:

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

Communication

Home Mobile Phone


A ***Type** **B** ***Email** **Submit** **Cancel**

Select a value

C Primary

D **Comments**

E **Attachments**

 Drag files here or click to add attachment

4. Click **Submit** to save details.

Address


1. Under the **Address** section, click **Add**.

The screenshot shows a 'Contact Info' page with two main sections: 'Communication' and 'Address'. The 'Communication' section lists 'Work Email' (email@ed.ac.uk) and 'Home Email' (email@gmail.com). The 'Address' section lists 'Home Address' with details: '1 Home Address', 'Edinburgh', 'Midlothian', and 'Postcode'. A 'Start Date' of '1/06/2024' is also shown. Red boxes highlight the 'Address' title and the '+ Add' button in the top right corner of the 'Address' section.


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.

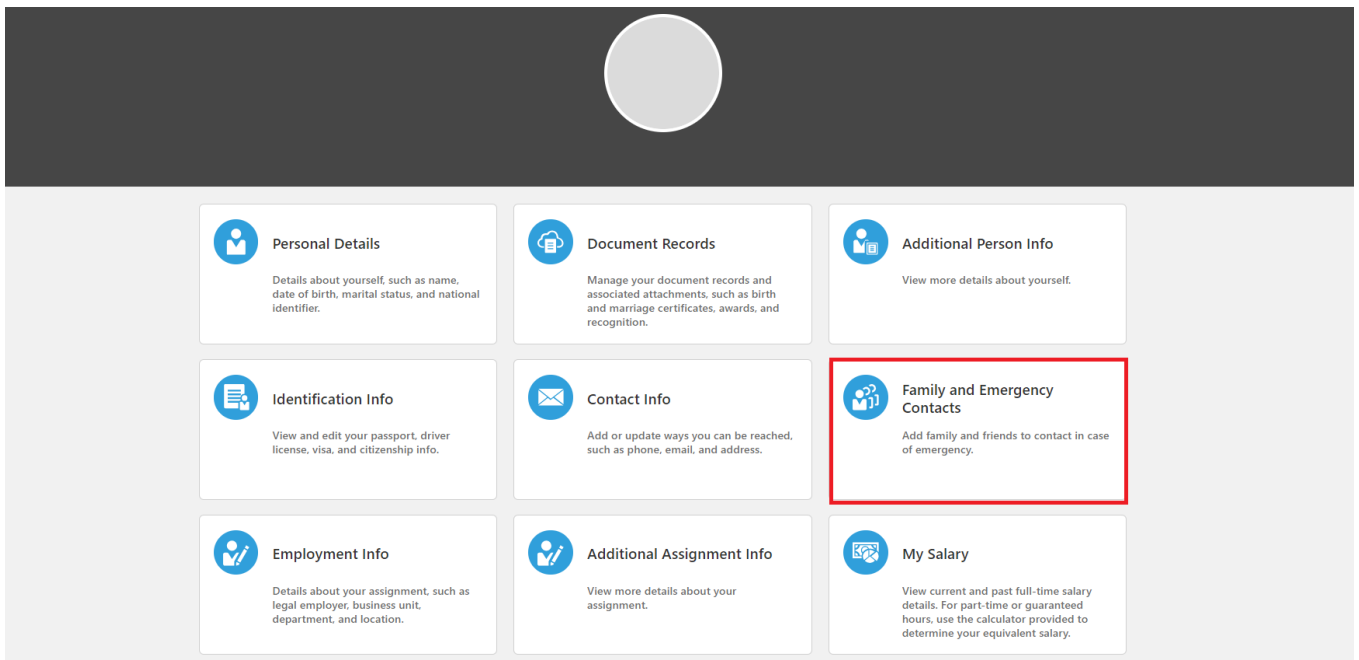
2. Enter the details as below:
 - a. **Country** is a dropdown option – Select as appropriate.
 - b. **Type** is a dropdown option – Select as appropriate.
 - c. **Start Date** – as appropriate.
 - d. **Address Line 1** – as appropriate.
 - e. **Address Line 2** – as appropriate.
 - f. **Address Line 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).
3. Click **Submit** to Save.

Address

A *Country	<input type="text" value="United Kingdom"/>	F Address Line 3	<input type="text"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>
B *Type	<input type="text" value="Select a value"/>	G *City or Town	<input type="text"/>		
C *Start Date	<input type="text" value="26/06/2024"/>	H County	<input type="text"/>		
D *Address Line 1	<input type="text"/>	I Postcode	<input type="text"/>		
E Address Line 2	<input type="text"/>	J <input type="checkbox"/> Primary			
K Comments	<input type="text"/>				
L Attachments	<div style="border: 1px dashed gray; padding: 10px; text-align: center;"> Drag files here or click to add attachment</div>				

Entering Your Emergency Contact Details

1. From the Home page open the **Me** section
2. Click **Personal Information**  Personal Information
3. Choose **Family and Emergency Contacts**



4. Click **Add** and **Create a New Contact**



5. Fill out the **Basic Information, Communication, Address** and add any **Comments and Attachments** for your chosen contact.

Basic Information

*Title Select a value	Middle Name <input type="text"/>
*First Name <input type="text"/>	*Last Name <input type="text"/>
*Preferred Name <input type="text"/>	*What's the start date of this relationship? dd/mm/yyyy
*Relationship Select a value	<input type="checkbox"/> This person is an emergency contact

Communication

Phones
Type Select a value
Email
Type Select a value

Address

<input checked="" type="radio"/> Use My Address
Select a value
<input type="radio"/> Enter a New Address

Comments and Attachments

Comments <input type="text"/>
Attachments

6. Click **Submit**

New Contact

Submit

Cancel

Basic Information

*Title Select a value
*First Name <input type="text"/>