



People and Money system

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 Search, View, and Upload Document Records Employee

Before You Start

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





New Employees – As part of your onboarding tasks and joining experience you will be asked to upload certain documents to the People & Money System, for example your signed contract of employment.

All employees 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 previously added to your record.
- Some of your records are stored in Document Records in People & Money, others are stored in the Employee File SharePoint. Find out where your 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](#).

Navigating to Document Records


1. From the **Home** page, click the **Navigator**  menu icon located at the top left.
2. Open the **Me** section, then click **Personal Information**  Personal Information
3. Click on the **Document Records**  tile.
4. You can click on the **View More**  icon on the right of existing documents to view them in detail, edit, or delete.

Adding New Document Record

1. Click **Add**, select the **Document Type** and complete the form with the **relevant details**.
2. To upload a document, click on **Drag files here or click to add attachment** in the **Attachments** section, and select **Add File**.
3. Click **Submit**.

For detailed guidance, see the [Adding New Document Record section](#).

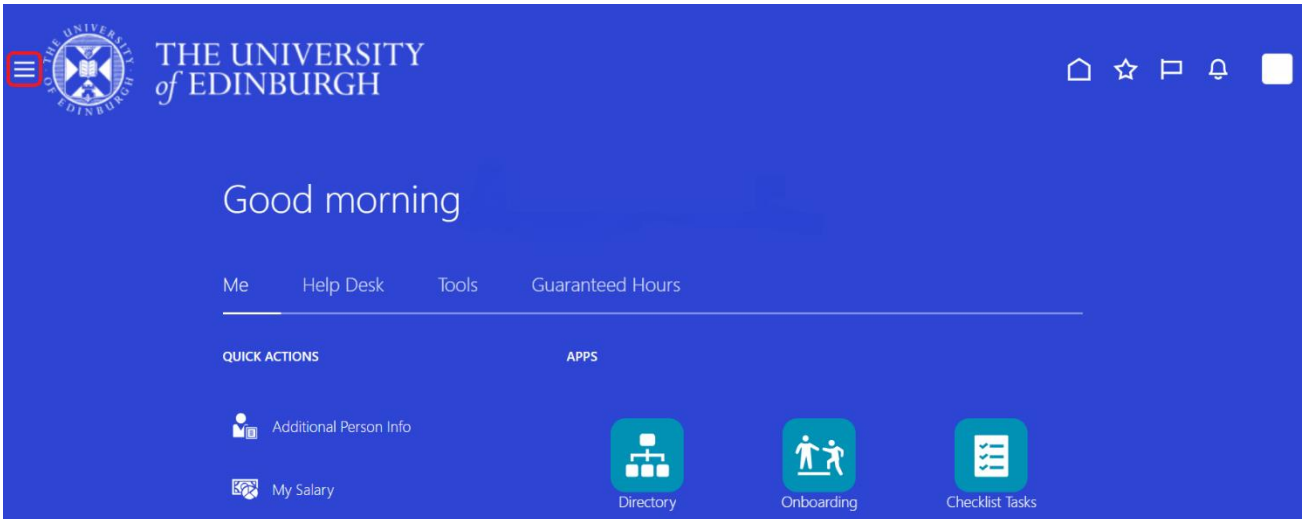
Editing Document Record

1. Click on the **View More**  icon for the applicable document and then click **Edit**.
2. Update the document details and then click **Save**.

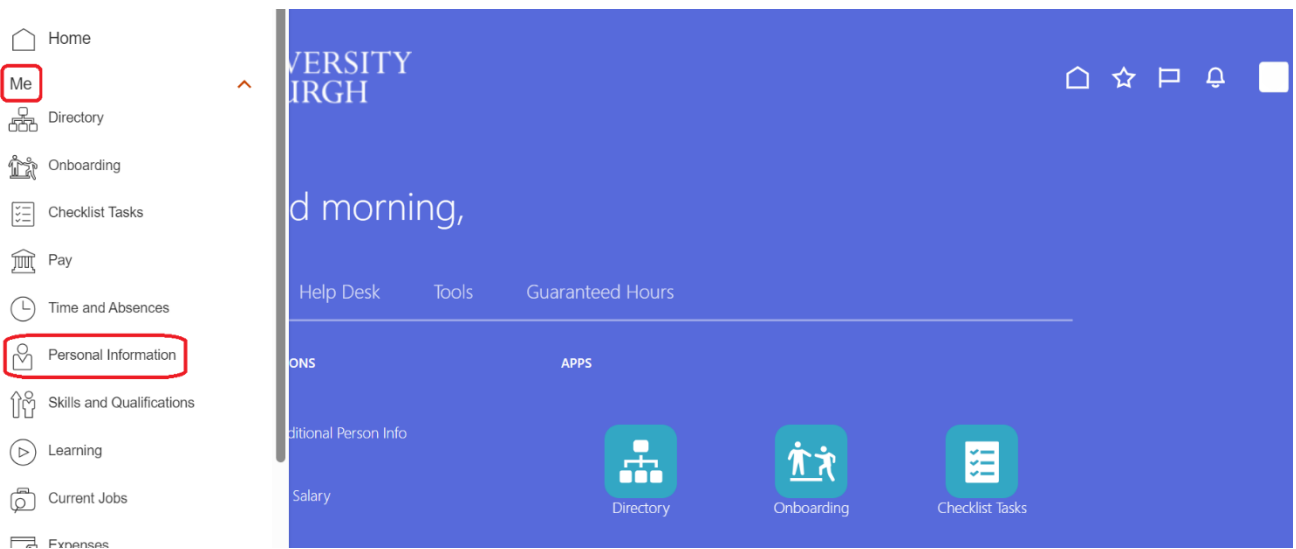
For detailed guidance, see the [Editing Document Record Section](#).

Adding New Document Record

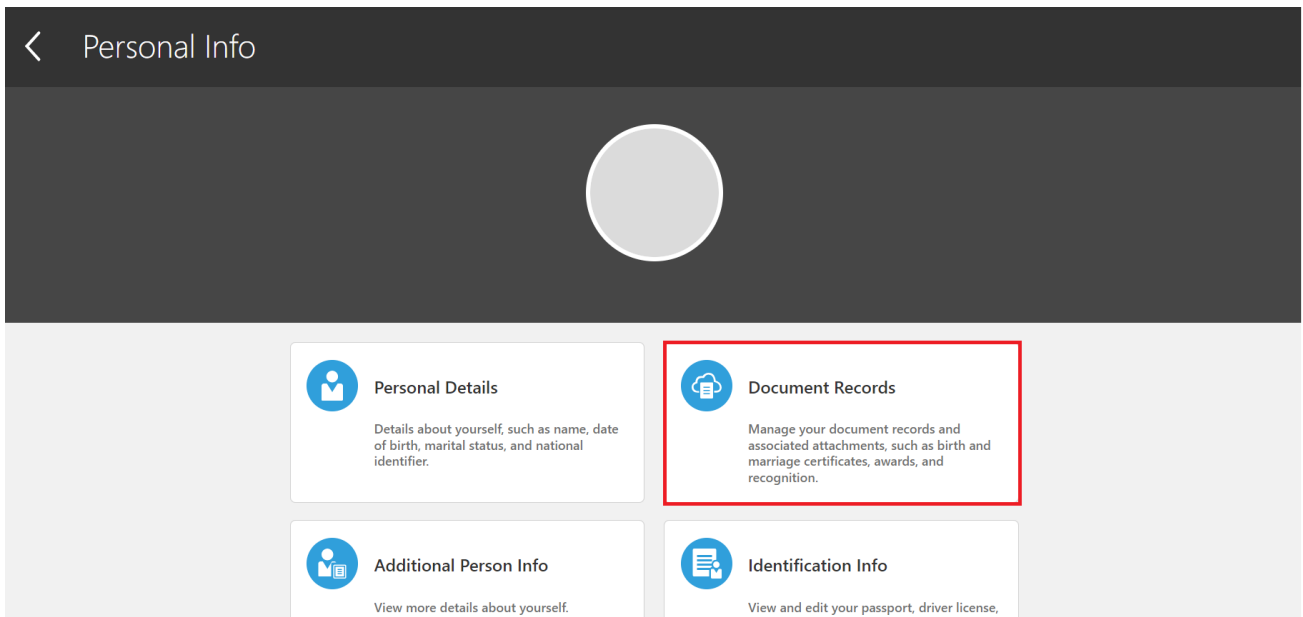
1. From the **Home** page, click the **Navigator** menu icon located at the top left.



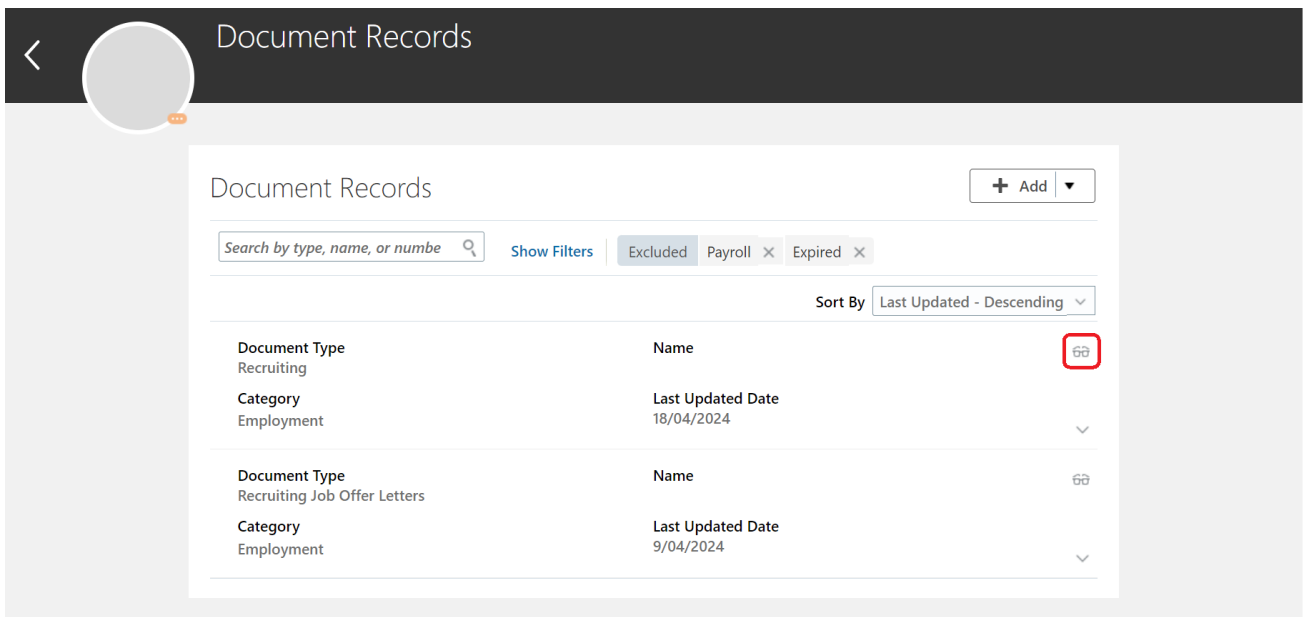
2. Open the **Me** section, then click **Personal Information**.



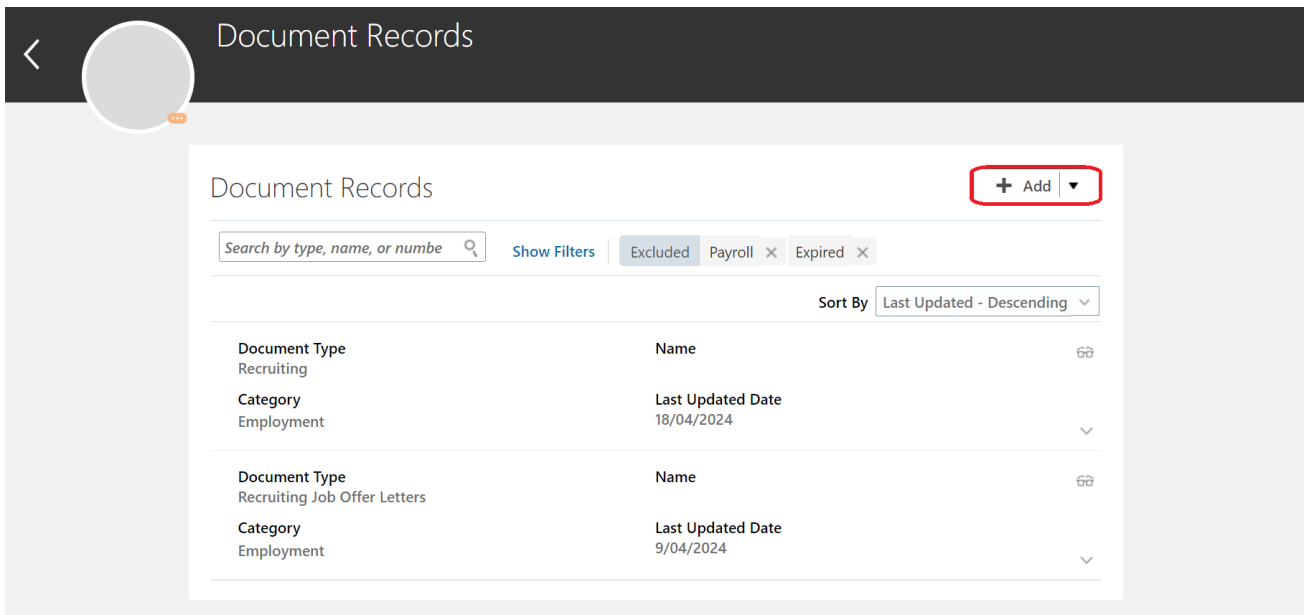
3. **Personal Info** page, click on the **Document Records** tile.



4. You can click on the **View More** icon on the right of existing documents to view them in detail.

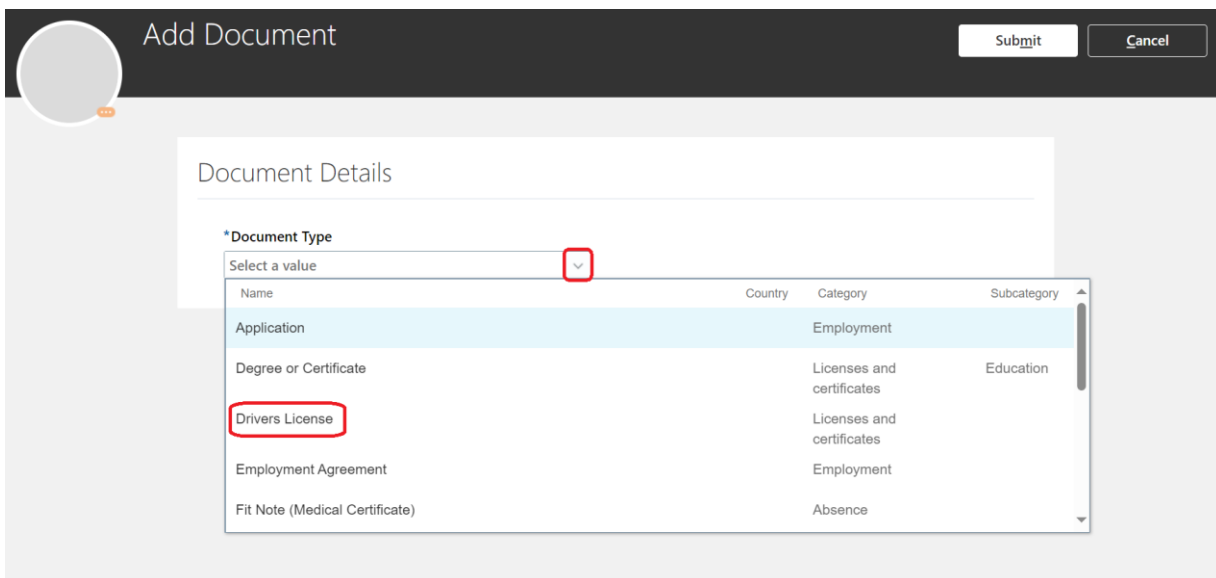


5. To upload documentation, click on the **Add** button in the **Document Records** page.



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

See the [Appendix](#) for a list of all document types.



7. Complete the fields in the Document Details with the relevant details.

Add Document Submit Cancel

Document Details

*Document Type
Drivers License

Category
Licenses and certificates

Country
All Countries

Description
Driving licence

*Name
[Empty field]

*From Date
dd/mm/yyyy

Issued On
dd/mm/yyyy

Context Value
[Empty dropdown]

Attachments

Note:

- a. Please ignore the **Context Value** field. This SHOULD NOT be filled out.
 - b. The **Issued On** field does not appear for all document types. Only complete the fields that appear.
8. To upload a document, click on **Drag files here or click to add attachment** in the **Attachments** section, and select **Add Files**

*Document Type
Drivers License

Category
Licenses and certificates

Country
All Countries

Description
Driving licence

*Name
[Empty field]

*From Date
dd/mm/yyyy

Issued On
dd/mm/yyyy

Context Value
[Empty dropdown]

Attachments

Drag files here or click to add attachment

Add File

Add Link

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

Add Document Submit Cancel

Document Details

*Document Type: Drivers License

Category: Licenses and certificates

Country: All Countries

Description: Driving licence

*Name:

Issued On: dd/mm/yyyy

*From Date: dd/mm/yyyy

Context Value:

Attachments:

 Drag files here or click to add attachment

Drivers License.docx (11.71 KB) By on 12/06/2024 11.06 AM ✕

10. Click **Submit** and the **Document Records** page opens with details of the uploaded document type.

Document Records + Add

Search by type, name, or number Show Filters Excluded Payroll Expired

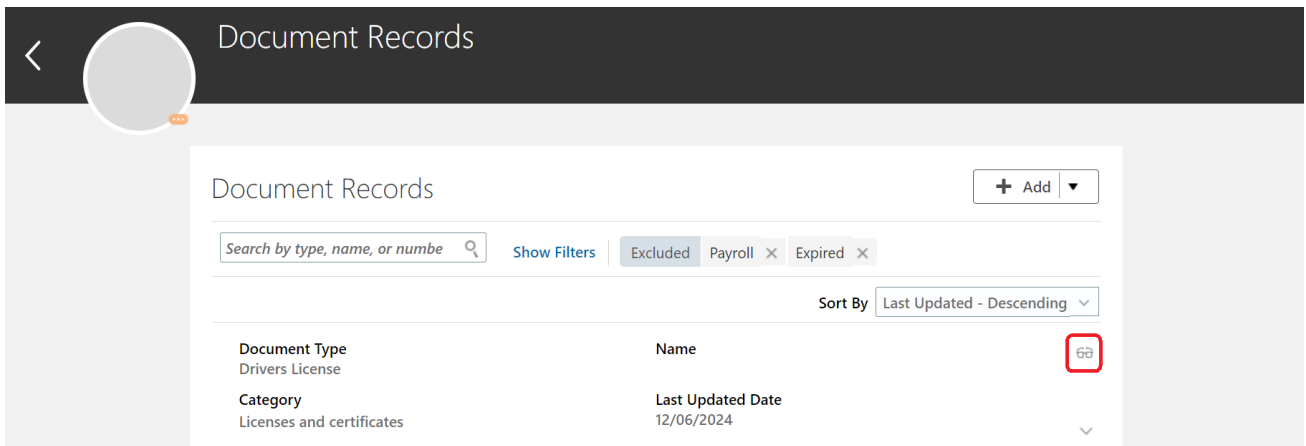
Sort By: Last Updated - Descending

Document Type Drivers License	Name	🔗
Category Licenses and certificates	Last Updated Date 12/06/2024	▼
Document Type Recruiting	Name	🔗

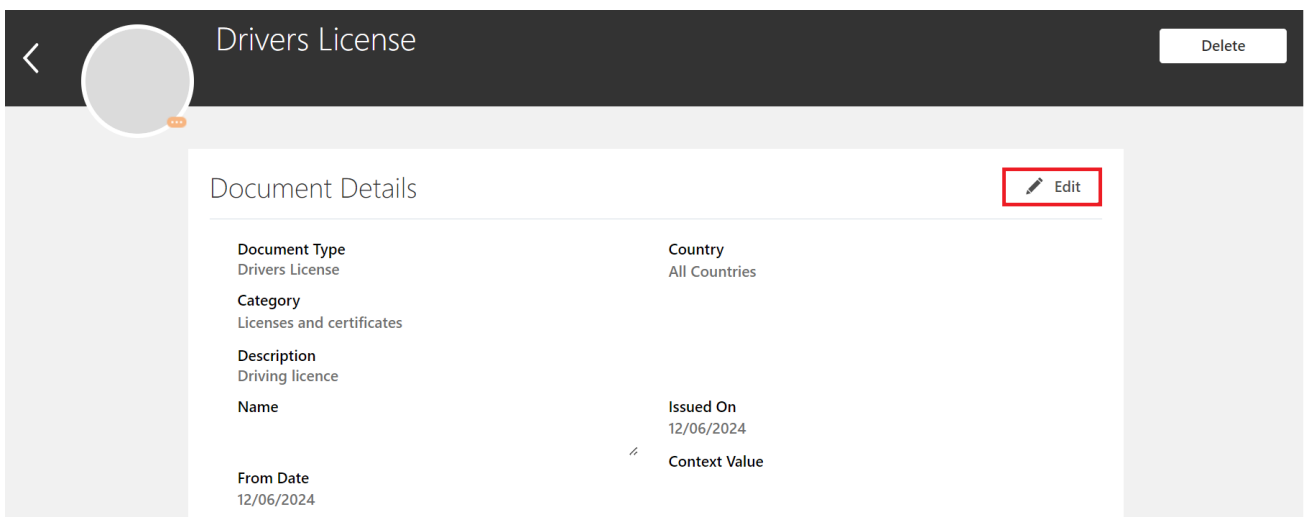
11. To upload a different document type, click the **Add** button and repeat steps 5 to 9.

Editing Document Record

1. From the **Home** page, click the **Navigator** menu icon located at the top left.
2. Open the **Me** section, then click **Personal Information**.
3. In the **Personal Info** page, click on the **Document Records** tile.
4. Click on the **View More** icon for the applicable document in the Document Records page.



5. Click the **Edit** button to open the online form.



6. Update the document with the required changes and then click **Save**.

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Lauren Dickinson

Delete

Document Details

Save
Cancel

Document Type
Drivers License

Category
Licenses and certificates

Country
All Countries

Description
Driving licence

***Name**

***From Date**

Appendix

Documents available to view or upload for Employees

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

Document Type	Description	View or Upload
Degree or Certificate	Qualification	View and Upload
Drivers licence	Driving licence	View and Upload
Employment agreement	Contract of Employment	View (upload would happen within the recruitment process for any new post)
Fit Note (Medical Certificate)	Medical Certificate	View (upload would happen within a sickness absence process)
P45	A document confirming previous employment, tax and national insurance information	View (upload would happen within the recruitment process)
Recruiting	Recruiting	View (upload would happen within the recruitment process)
Recruiting Job Offer	Job Offer	View (upload would happen

Letters		within the recruitment process)
Relocation - Repayment terms - Visa Loan terms	Repayment terms - Visa Loan terms	View (upload would happen within the recruitment process)
The document types below should no longer be used but are still visible for historic purposes		
Application	Application	View only
Other Employment	Other Employment	View only
Relocation – Repayment terms – Partner career transition repayment agreement	Repayment terms – Partner career transition repayment agreement	View only
Relocation – Repayment terms – Relocation repayment agreement	Repayment terms – Relocation repayment agreement	View only
Resignation Letter	Resignation Letter	View only