



People and Money system

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Line Manager Guide – How to Search, View and Upload Documents to Document Records

Line Manager

Before You Start

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

A line manager can only add/upload selected file types. For more details, please see the [appendix](#).


- All line managers 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 for and Viewing a Document

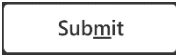
1. From the Home page, click on **My Team**
2. Select **Show More** under Quick Actions

3. In the Employment section, click on  **Document Records**
4. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box
5. All the documents held against this employee's record should be listed on the screen

For detailed guidance, see the [Searching for and Viewing a Document section](#).




Uploading a new Document

1. Follow steps 1-4 above in the Searching for and Viewing a Document section
2. Click on the **Add**  button on the top right corner
3. From the Document Type dropdown menu, **select** the appropriate type of document you wish to upload
For a list of all the available document types, go to the [Appendix](#)
4. **Fill in** the relevant details in the fields that appear and then press **Submit**



For detailed guidance, see the [Uploading a new Document section](#).

Editing a Document

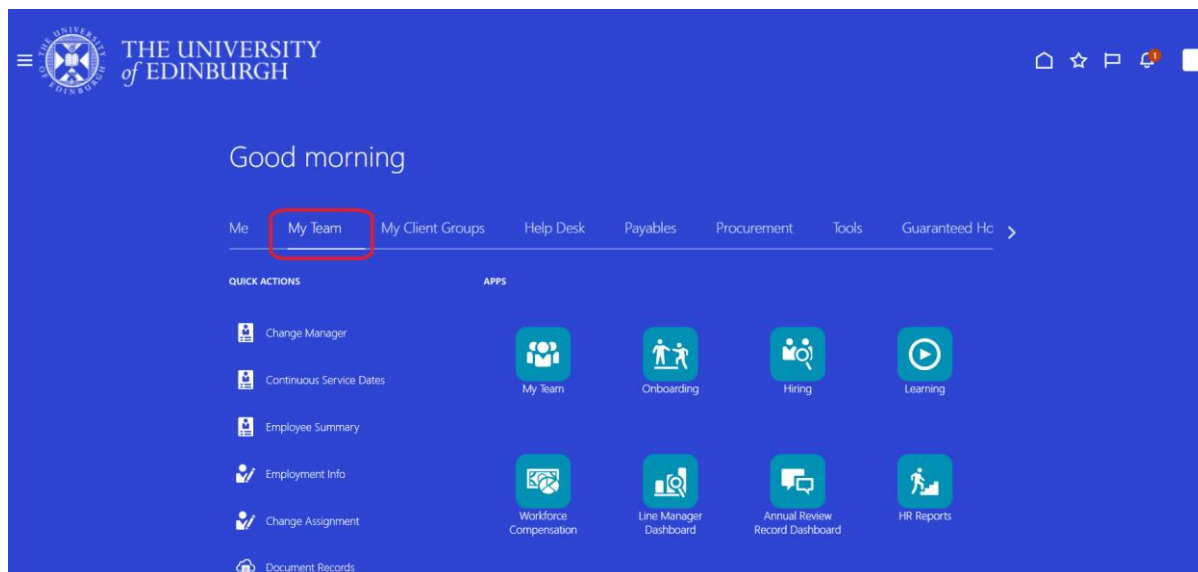
1. Follow steps 1-4 above in the Searching for and Viewing a Document section
2. Click on the **View More**  icon for the applicable document
3. Then click on the **Edit**  button on the top right
4. Once you've made the necessary changes, click **Save** 

For detailed guidance, see the [Editing a Document section](#).

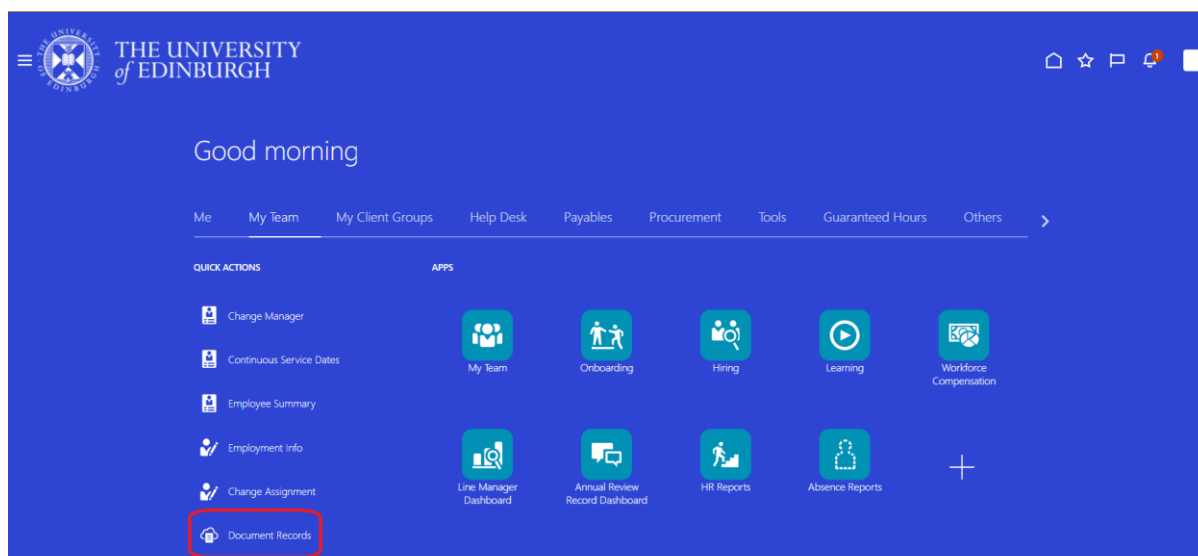
In Detail...

Searching for and Viewing a Document

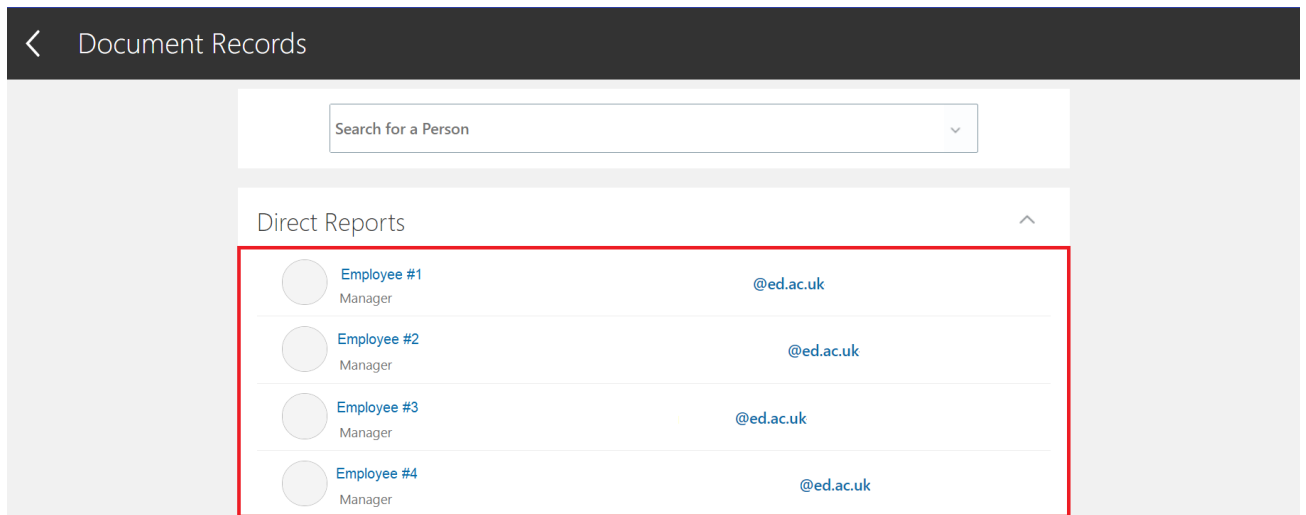
1. From the Home page, click on **My Team**



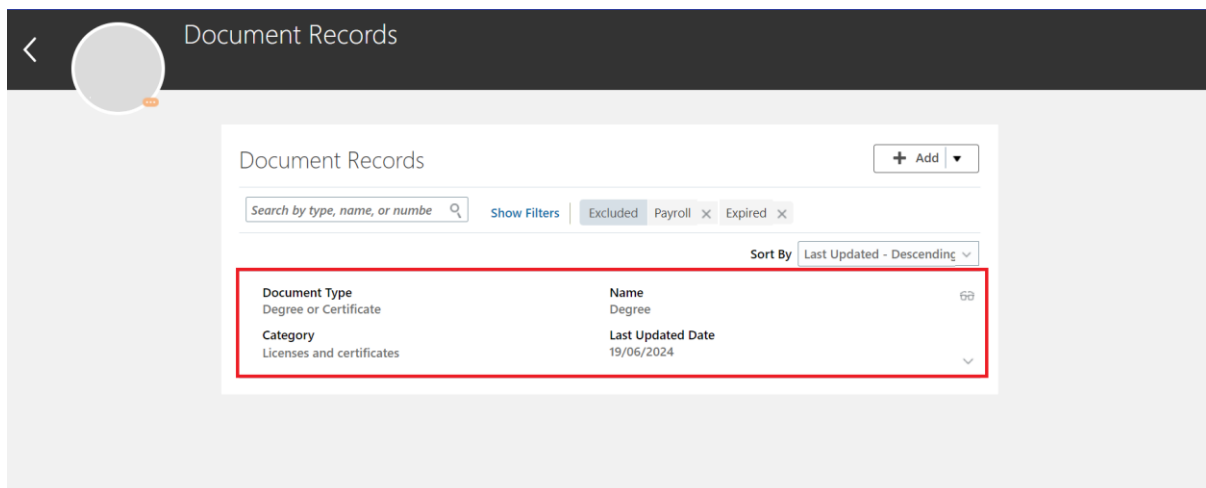
2. Click on **Document Records** under Quick Actions



3. You can **select** the relevant employee from your list of Direct Reports or **search** for the using the search box

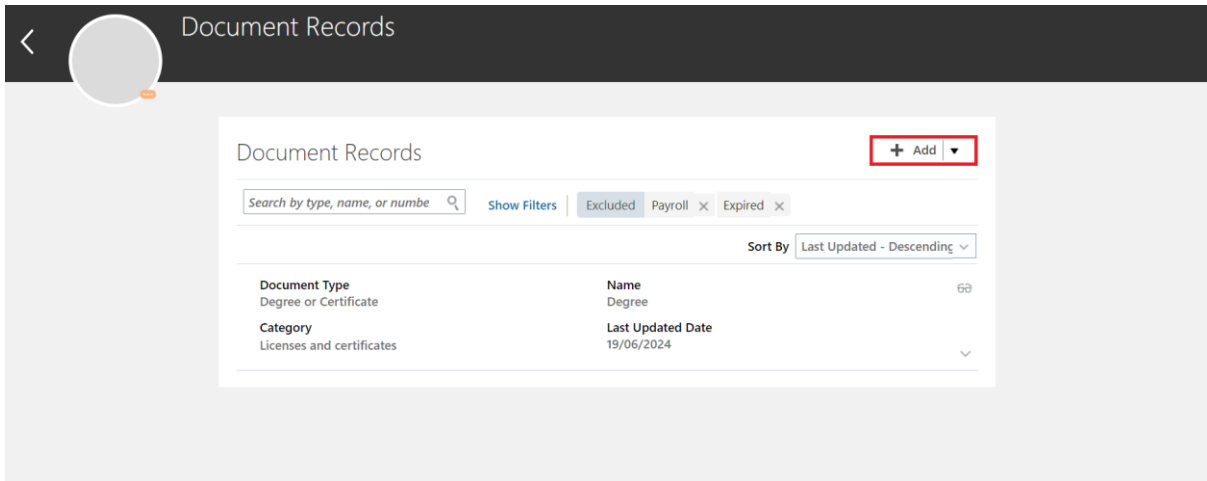


4. All the documents held against this employee's record should be listed on the screen

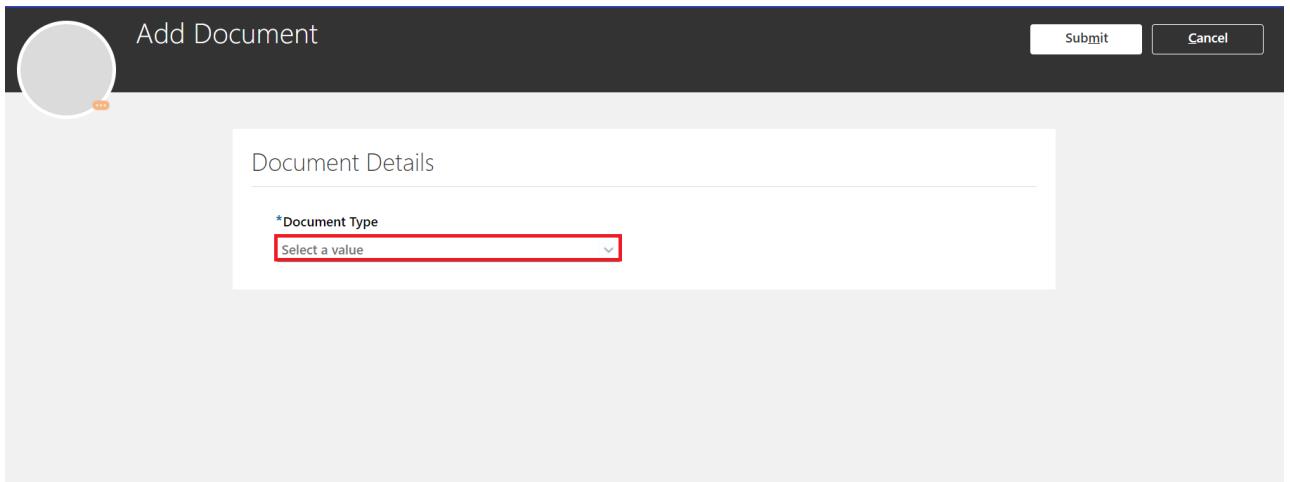


Uploading a new Document

1. Follow steps 1-4 above in the [Searching for and Viewing a Document section](#)
2. Click on the **Add** button on the top right corner



3. From the Document Type dropdown menu, **select** the appropriate type of document you wish to upload




For a list of all the available document types, go to the [Appendix](#).

4. **Fill in** the relevant details in the Document Details fields that appear and then press **Submit**

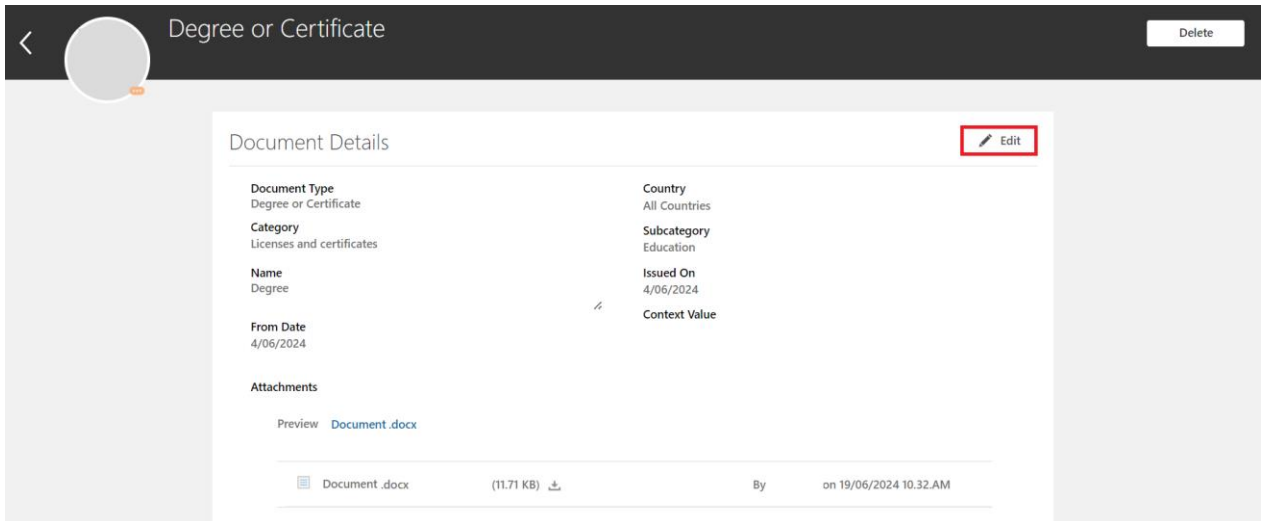
Note:

- 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.

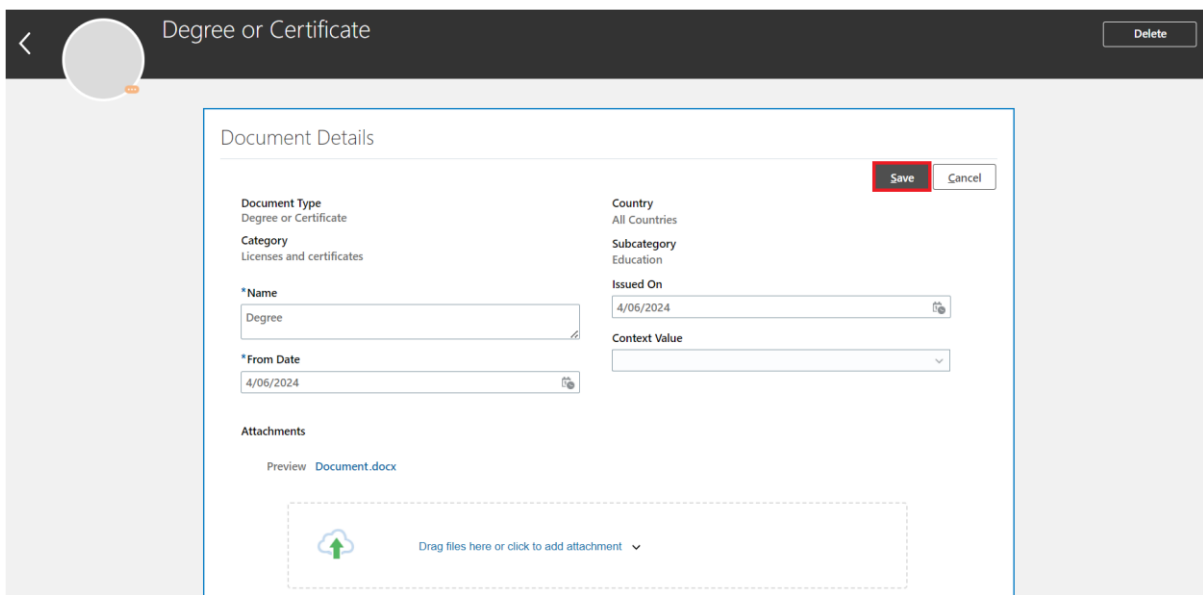
Editing a Document

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- 2. Click on the **View More**  icon for the applicable document

- 3. Then click on the **Edit** button on the top right



4. Once you've made the necessary changes, click **Save**



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.

Employee Documents available for Line Managers to view or upload

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

Document Type	Description	View or Upload
Degree or Certificate	Qualification	View and Upload
Fit Note (Medical Certificate)	Medical Certificate	View (upload would happen within a sickness absence process)
Right to Work	Right to Work	View (upload would happen in the recruitment process)
Self Certificate (Return to Work)	Self Certificate (Return to Work)	View (upload would happen within a sickness absence process)
The document types below should no longer be used but are still visible for historic purposes		
Resignation Letter	Resignation Letter	View only
Casual Worker – Right to Work Documents	Right to Work Documents	View Only