



# THE UNIVERSITY *of* EDINBURGH

## System User Guide

# How to View and Search the Employee Directory

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## Introduction

This guide covers key tasks for **Employees** in 'How to View and Search the Employee Directory' system process.

Employees – As part of the People & Money System you have access to a Staff Directory. This includes public information that other members of staff at the university can view.

This guide covers how to use the directory including:

- Searching and Viewing the Employee Directory
- Viewing and Printing Organisation Charts

## In Brief

This section is a **simple overview** and should be used as a reminder. More detailed information, screenshots and tips is provided within the 'In Detail' section.

### Searching and Viewing the Employee Directory

1. From the **Home** page, open the **Me** section.
2. Click **Directory**.
3. Enter the person's name in the search field and click on their **Name**.  
**Note:** If you wish to search for a Department or Job Title, this must be done via **Advanced Search** rather than just the standard search.
4. Click on the applicable name in the list of results to view their details.
5. Expand **Representatives** to see key contacts for the employee.

For detailed guidance, see [Searching and Viewing the Employee Directory](#) section.

### Viewing and Printing Organisation Charts

1. From the **Home** page, open the **Me** section.
2. Click **Directory**.
3. To view your organisational chart, click **My Organisation Chart**, to view someone else's organisation chart, search for them in the Directory and click on their Organisation Chart icon.
4. To print the organisation chart click **Print**.
5. Use the dropdown menu to choose what **File Format** you require.
6. Use the dropdown menus to indicate how many **Levels to Display** and which **Fields to Display**
7. Fill out other fields as appropriate.
8. Click **Preview** to see a preview of the chart.
9. Click **Print** and the file will be downloaded by your browser.
10. You can either save or print locally.

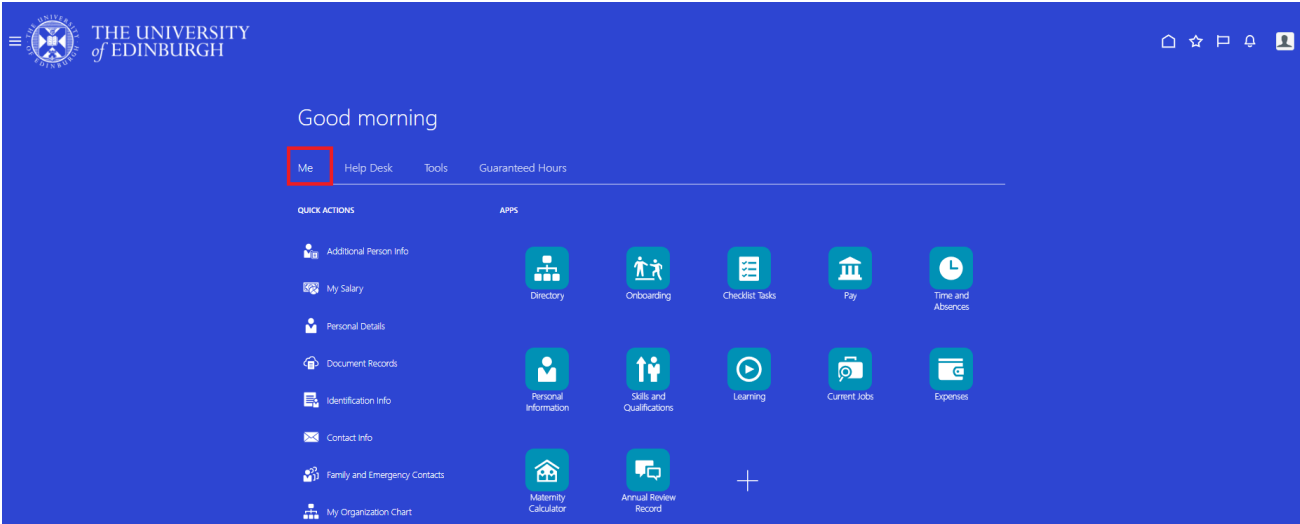
For detailed guidance, see [Viewing and Printing Organisation Charts](#) section.

# In Detail

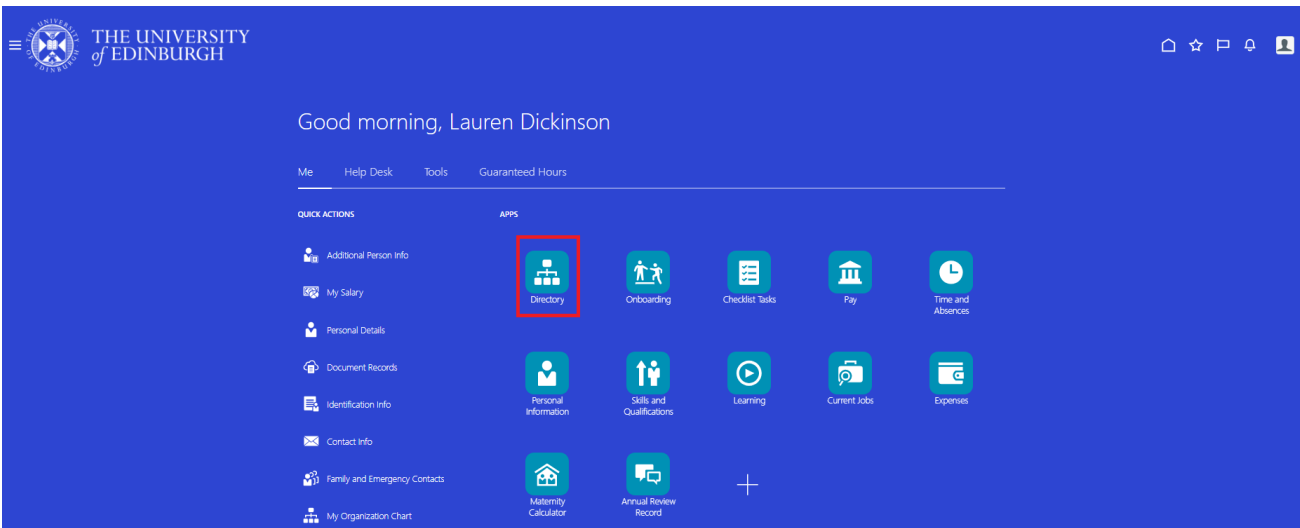
This section provides the detailed steps and includes relevant screenshots from the system.

## Searching and Viewing the Employee Directory

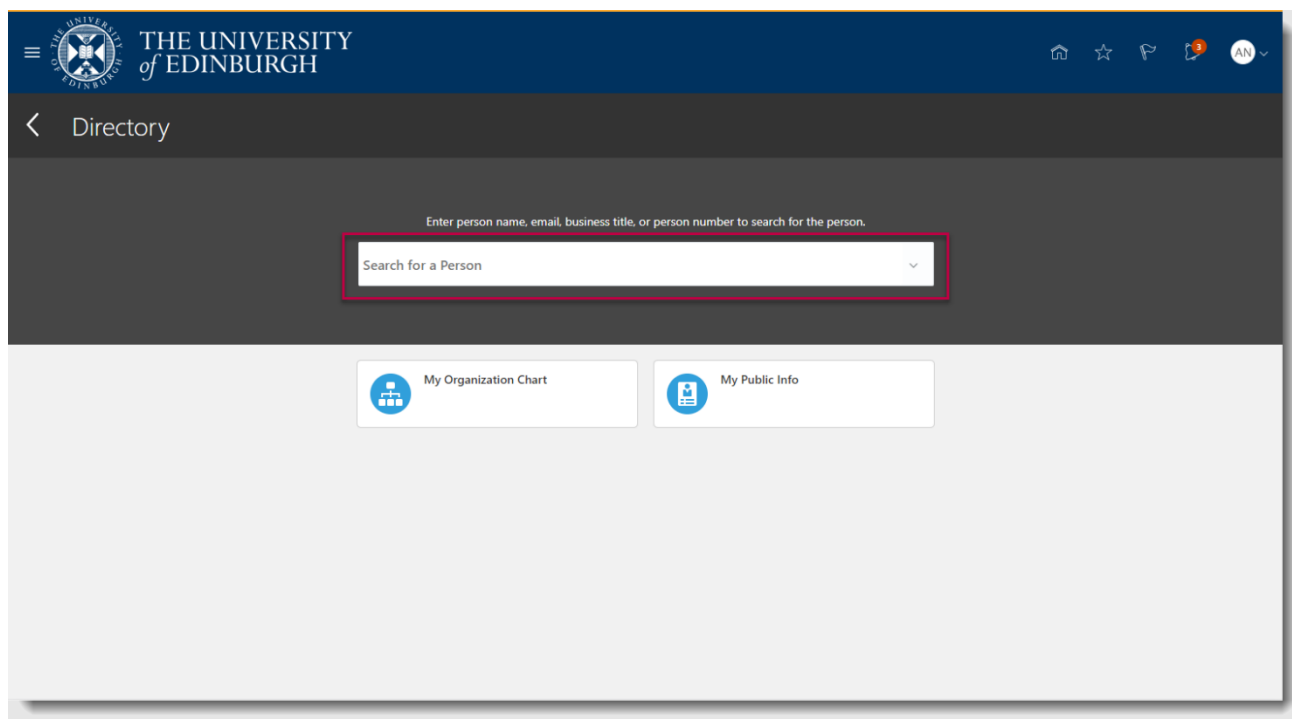
- 1. From the **Home** page, click the **Me** section.



- 2. Click **Directory**.

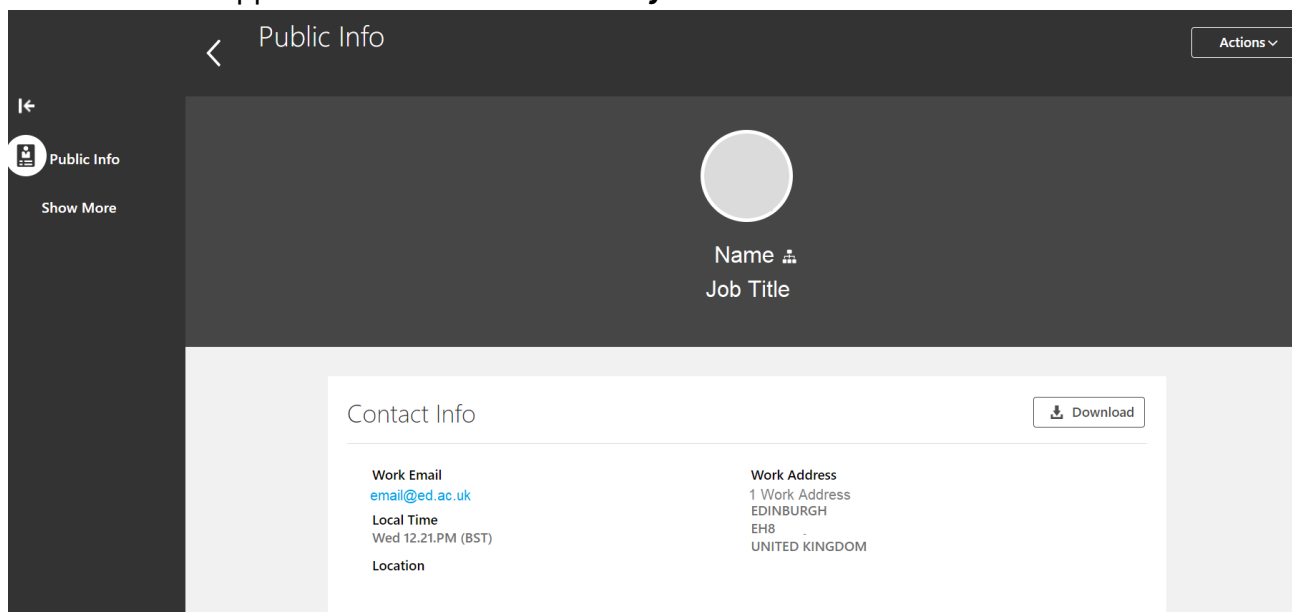


- 3. Enter the person's name in the search field and click on their **Name**.







**Note:** If you wish to search for a Department or Job Title, this has to be done via **Advanced Search** rather than just the standard search.

4. Click on the applicable name in the **Directory** to view their details.



5. Expand **Representatives** to see key contacts for the employee.

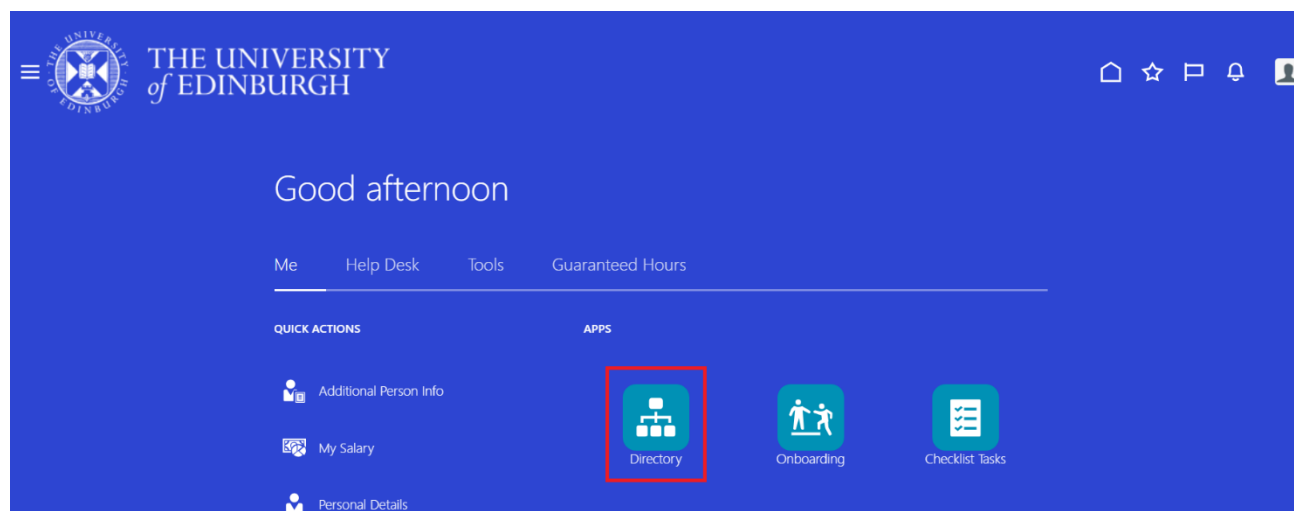
Representatives			^
	<b>Representative</b> Finance Manager	representativeemail@ed.ac.uk	
	<b>Representative</b> GH Admin	representativeemail@ed.ac.uk	
	<b>Representative</b> GH Admin	representativeemail@ed.ac.uk	
	<b>Representative</b> GH Admin	representativeemail@ed.ac.uk	


**Note:** Those listed here include key contacts within School/Departments as well as Finance Managers.

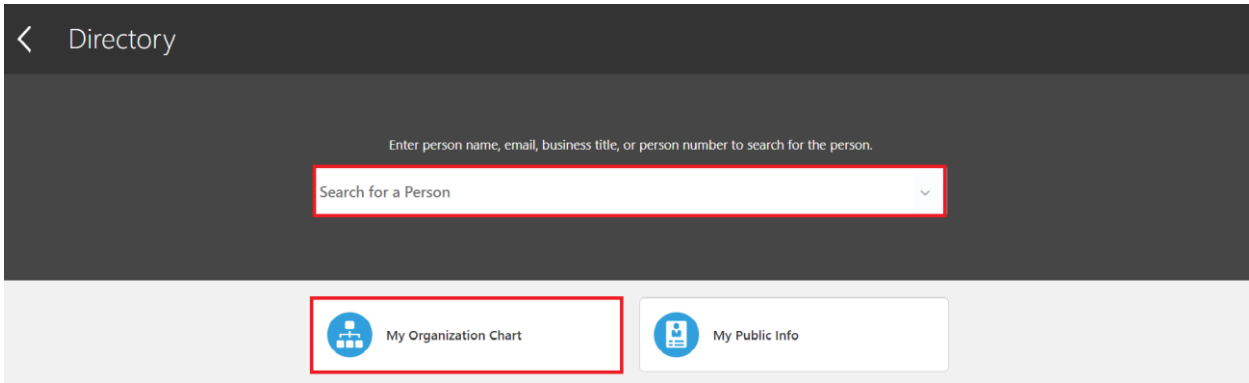
Representatives can perform certain actions on your record.

## Viewing and Printing Organisation Charts

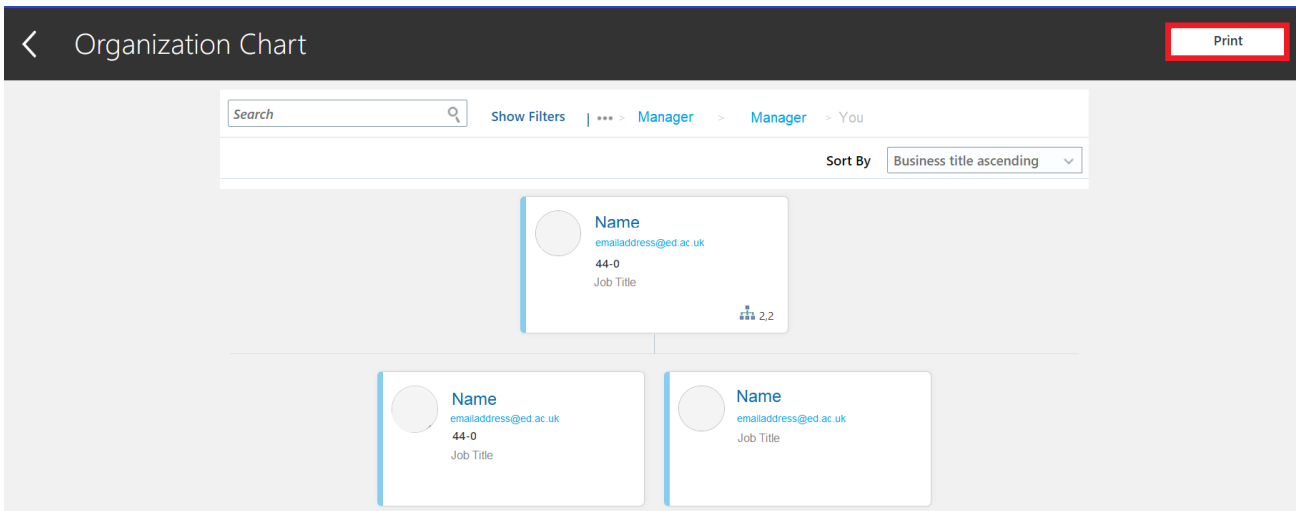
1. From the **Home** page, open the **Me** section.
2. Click **Directory**.



3. To view your organisational chart, click **My Organisation Chart**, to view someone else's organisation chart, search for them in the Directory and click on their Organisation Chart  icon.



4. To print (or download) the organisation chart click **Print**.



5. Use the dropdown menu to choose what **File Format** you require, e.g. PDF.

## Print Options

Organization Head

\*Levels to Display

File Format

\*Fields to Display

Layout Definition

Orientation

☒ Horizontal

☐ Vertical

6. Use the dropdown menus to indicate how many **Levels to Display** and which **Fields to Display**.

## Print Options

Organization Head

\*Levels to Display

File Format

\*Fields to Display

7. Fill out other fields as appropriate.
8. Click **Preview** to see a preview of the chart.



Configure Organization Chart Print

PrintPreview

Print Options

Organization Head

\*Levels to Display

1

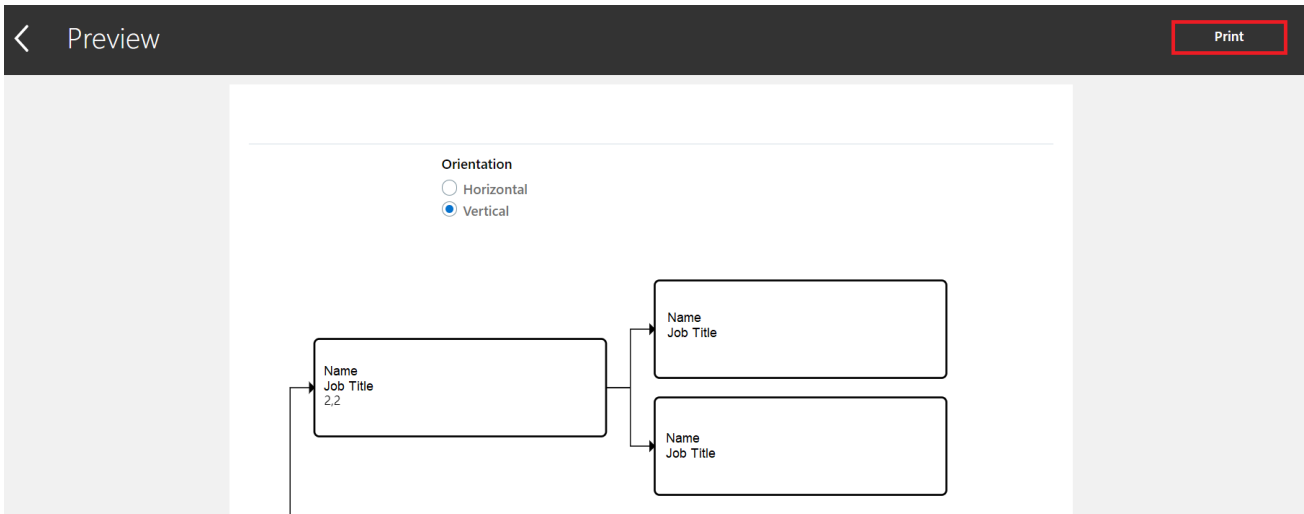
File Format

PDF

\*Fields to Display

Business Title;Directs;Name

9. Click **Print** and the file will be downloaded by your browser.



10. You can either save or print locally.

## Version History

Version	Date	Description	Approved By
1.0	04 August 2025	Updated guide to new format	M Easton 01/08/25

## Reviewers & Approvers

Further details of the Reviewers and Approvers of this document can be found by contacting HR Process Improvement. Please raise a Service Request using the category Continuous Improvement.