UCI Document Management

Personnel Records Online system (PROs) User Manual

Revised: August 8, 2023

UCI Transportation and Distribution Services
UCI Division of Finance and Administration | With U • For U

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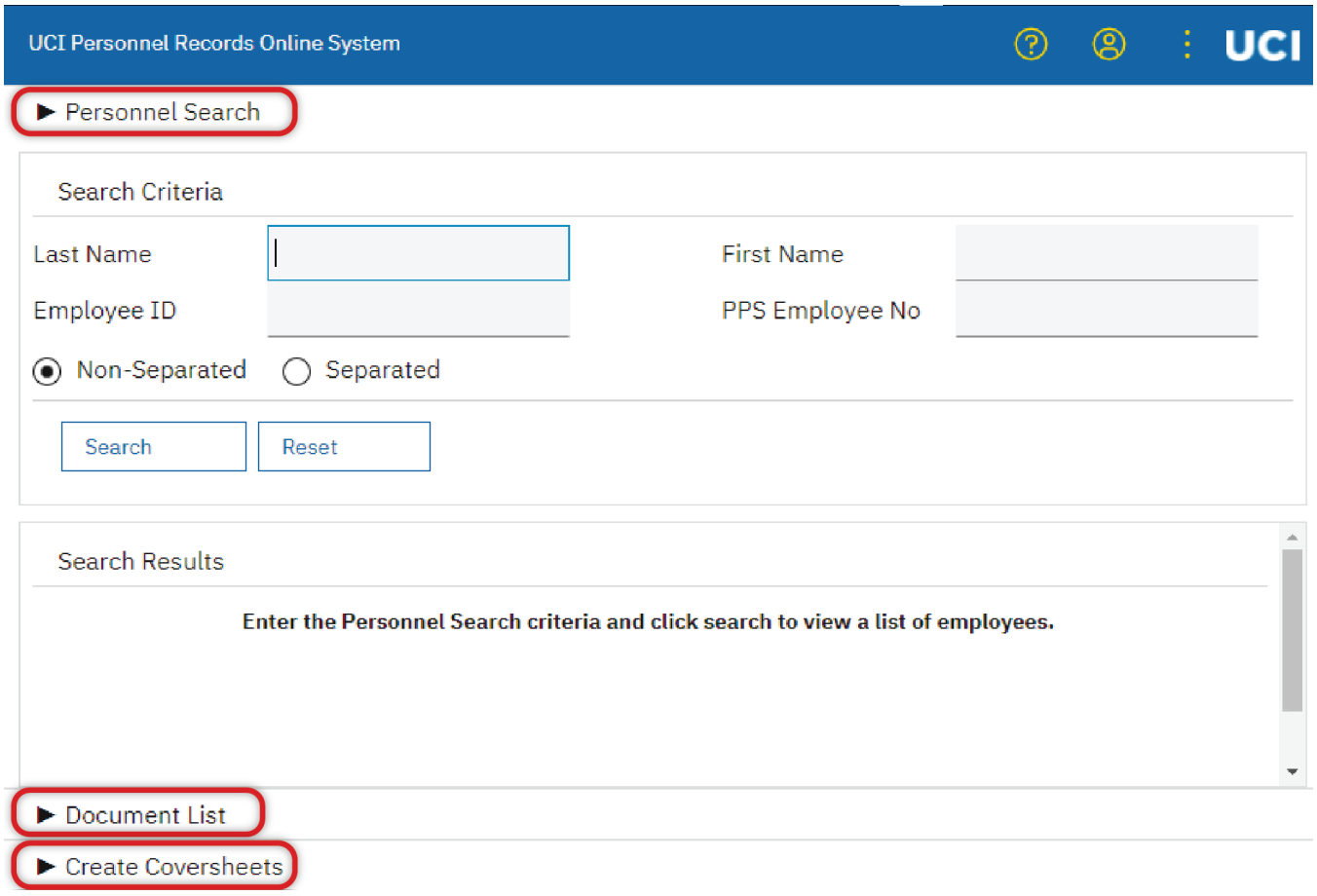
PROs User Access and Homepage

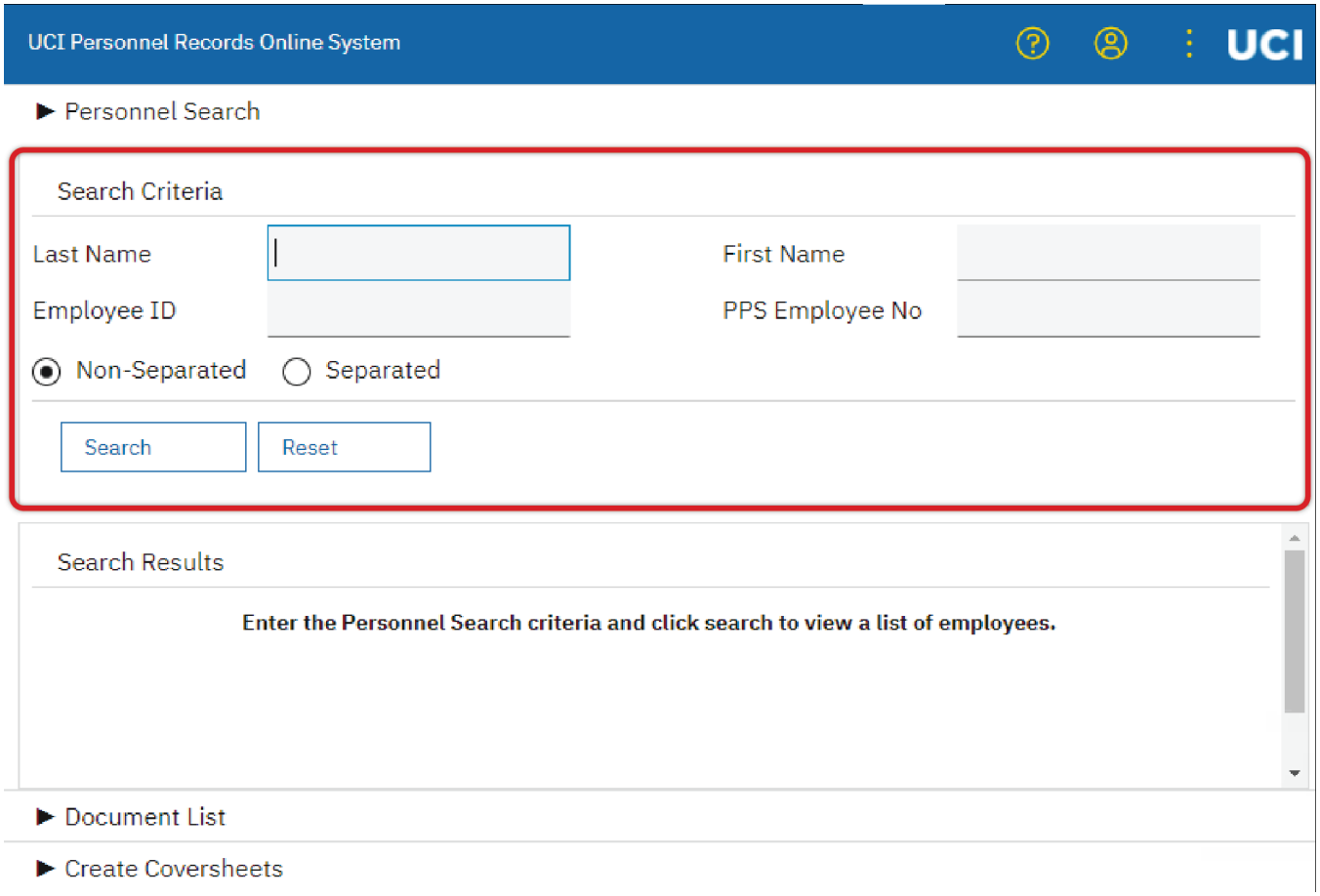
- Log in with your UCInetID and password. Duo Multi-Factor Authentication is required for added security.
- Functions in PROs are available on one screen and you do not have to switch from one task to another.
- Each tab performs its own function and allows the user to switch back and forth without losing the data they have.



Accessing Employee Personnel Files

Step 1: Input Employee Information under Search Criteria

Search for an employee by last name, first name, or employee ID (or with a combination of the three).

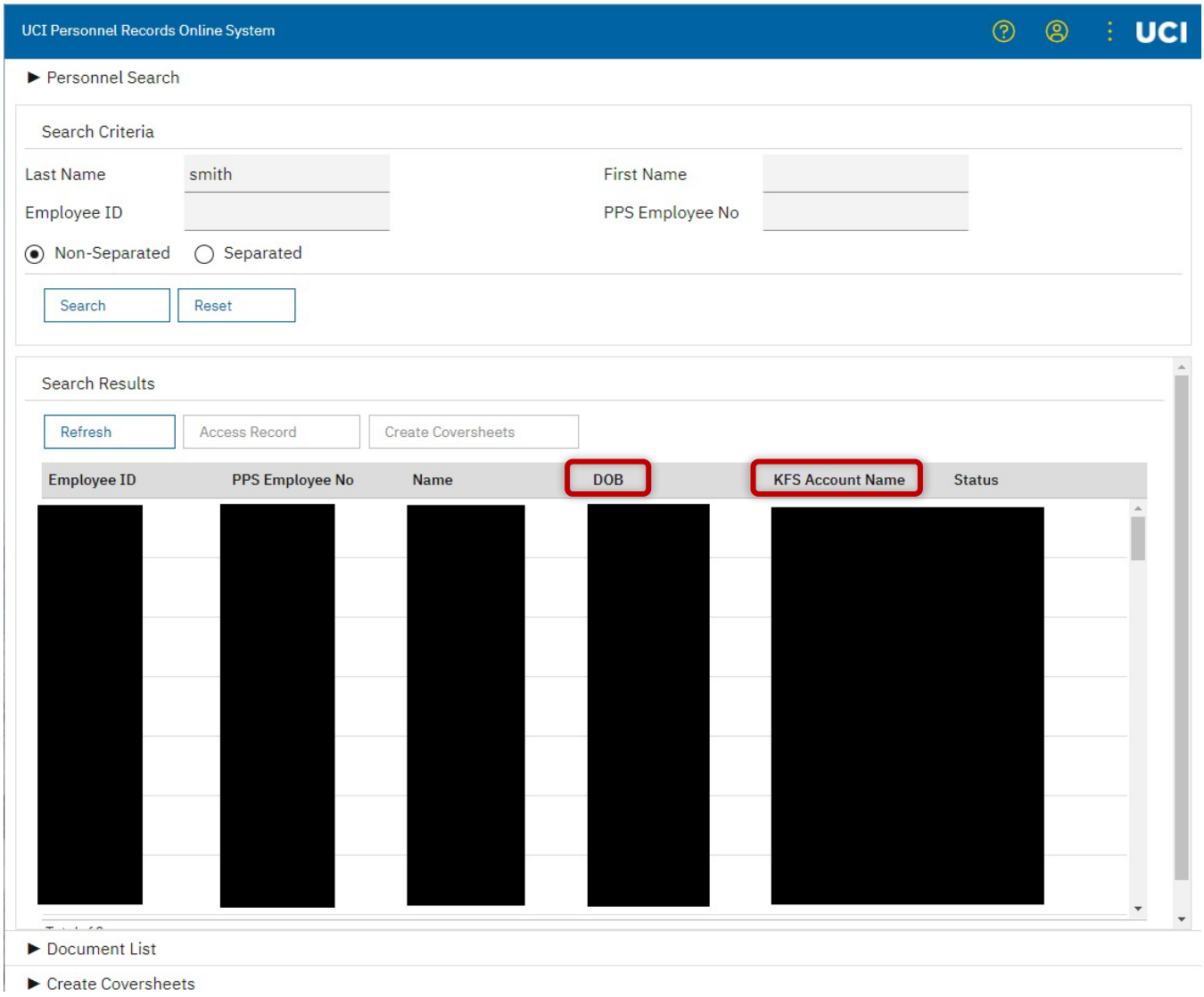


The “Non-Separated” and “Separated” search options are available based on your access level.

Accessing Employee Personnel Files

Step 2: Filter through Search Results for Correct Employee

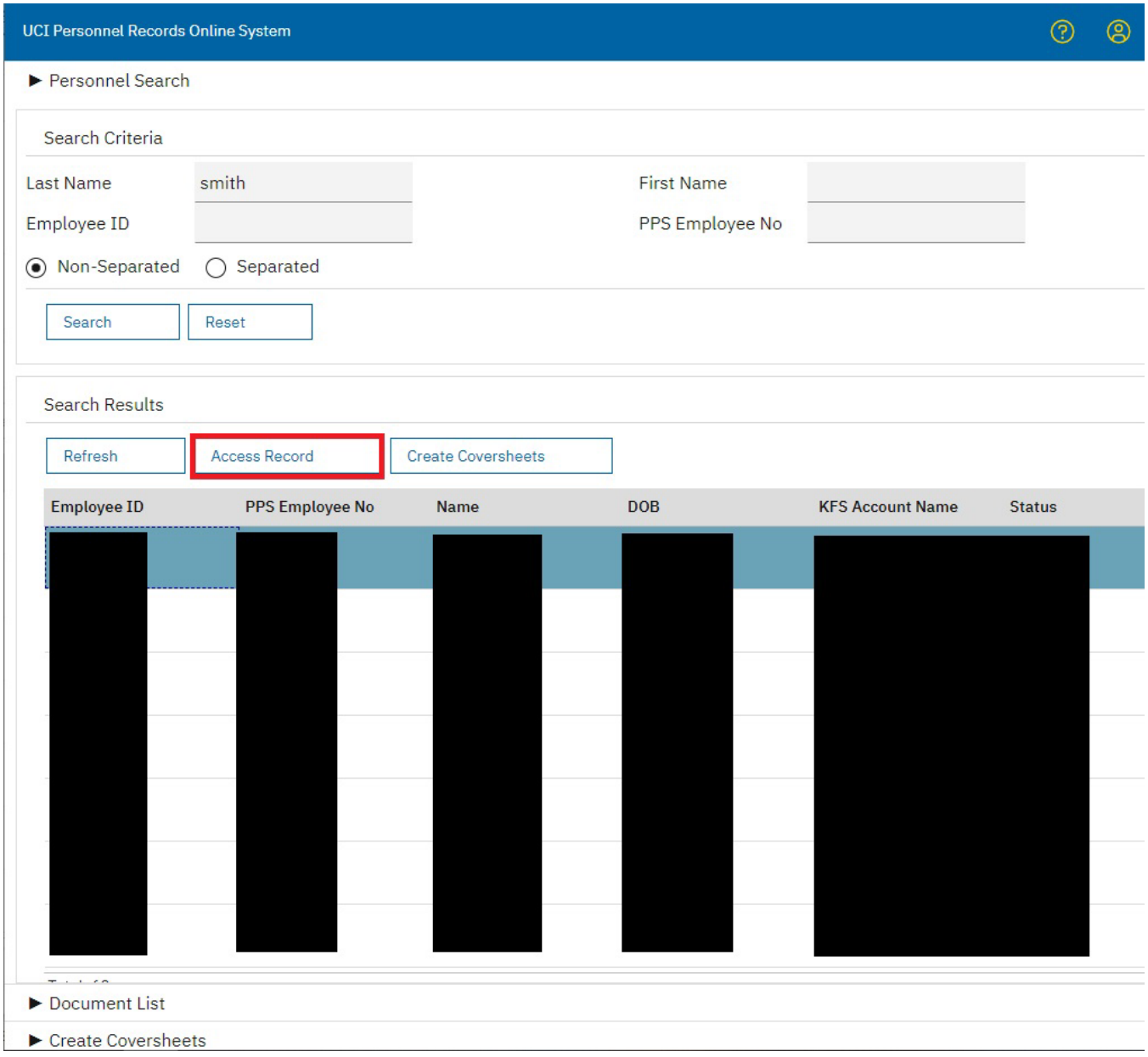
Multiple employees may appear when you search by employee name only. If this is the case, you may use other fields to help you locate the correct employee, including “Date of Birth” and “KFS Account Name.”



Accessing Employee Personnel Files

Step 3: Select Employee and Click “Access Record”

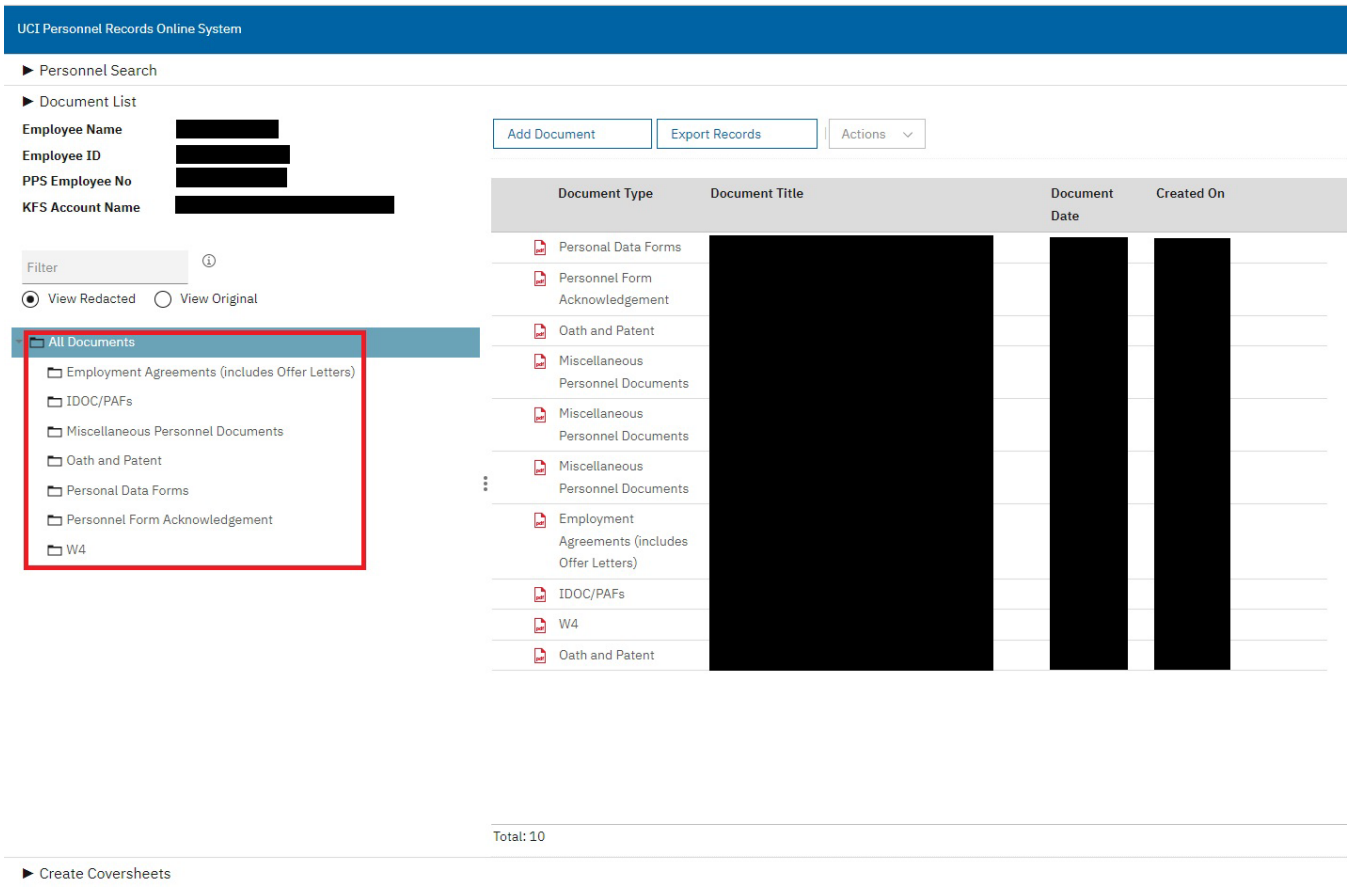
Selecting an employee profile will highlight that entire row.



Accessing Employee Personnel Files

Step 4: View or Filter through Document List

By default, all available documents are displayed. Selecting a document type will isolate matching files.

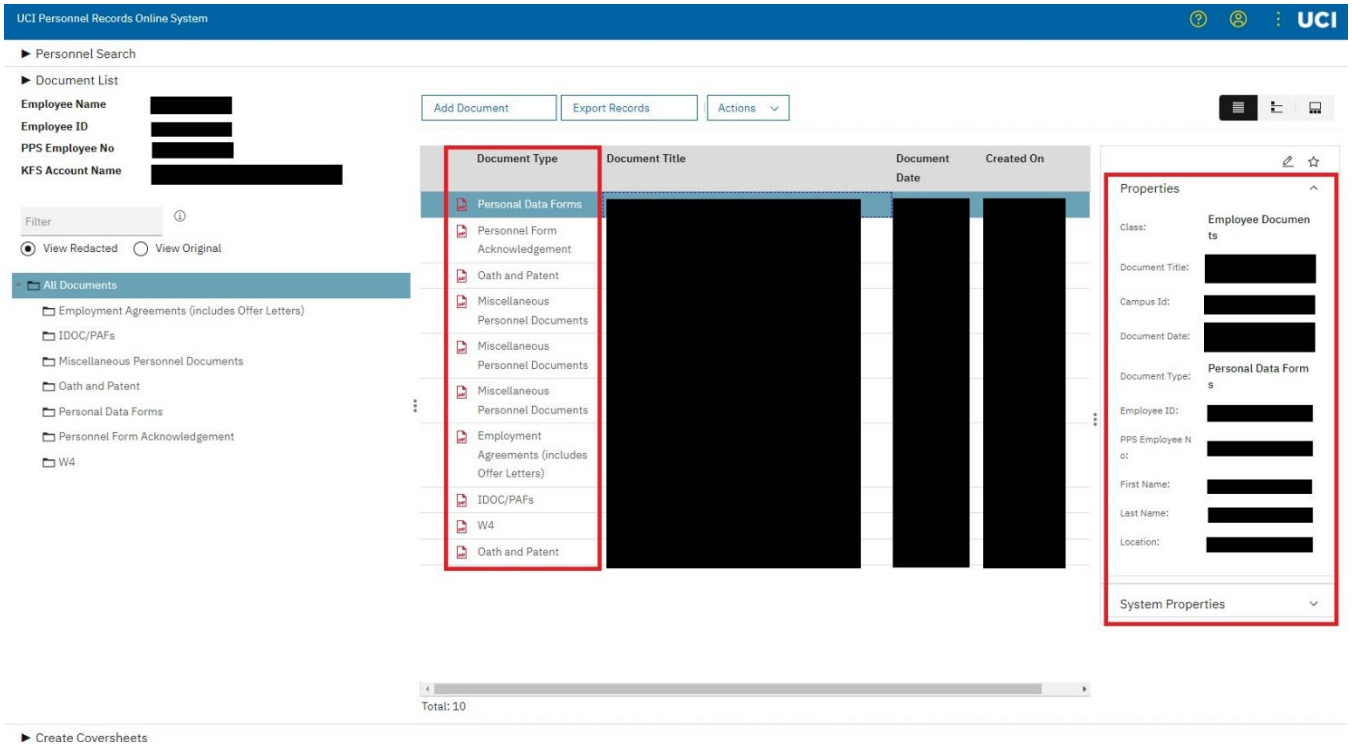


Your PROs user role determines which files are displayed.

Viewing a Personnel Document

Option 1: Select Document to View Properties Panel

After accessing an employee's list of personnel files, clicking on a document will open the file's properties panel on the right side.

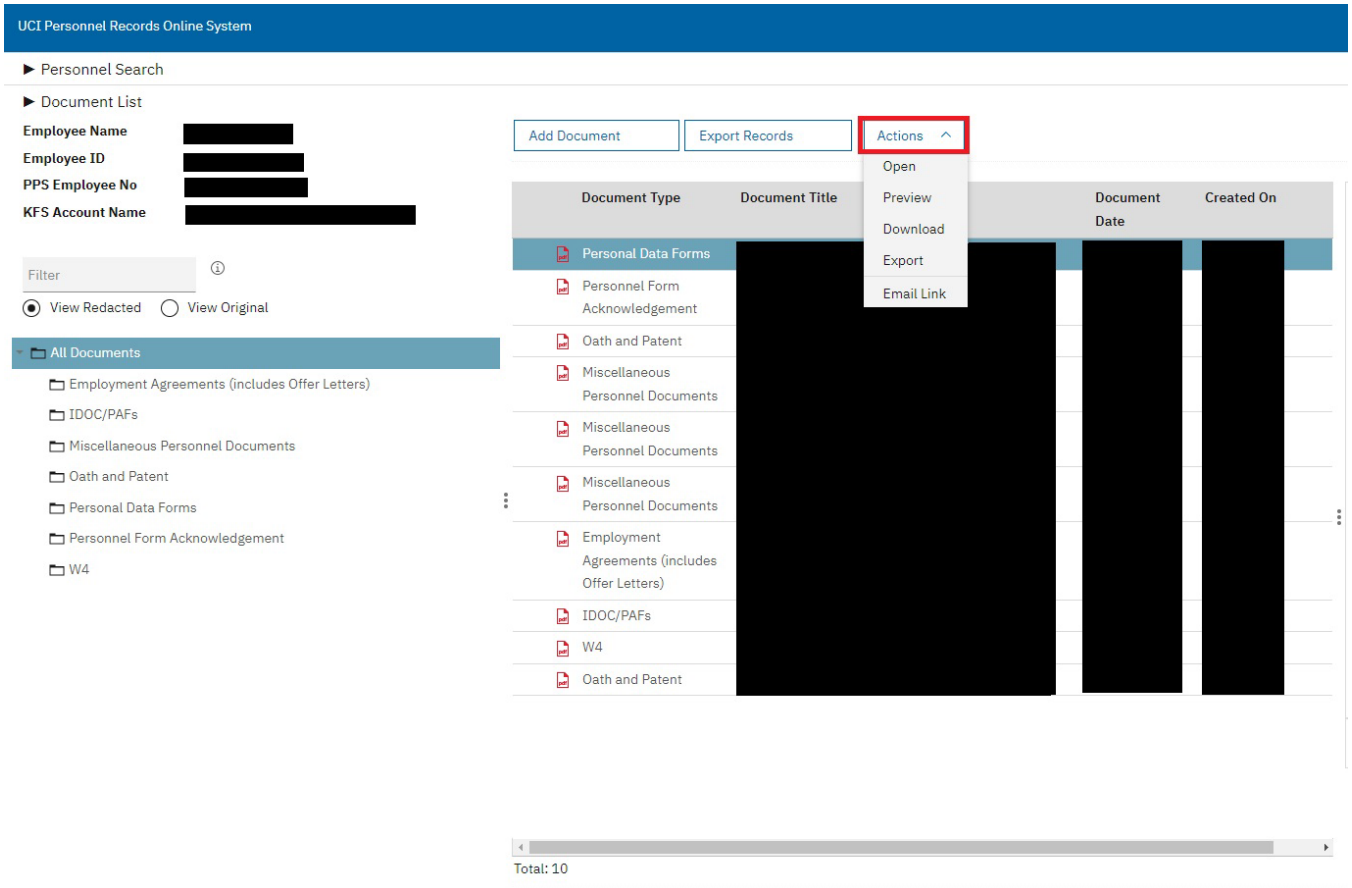


Viewing a Personnel Document

Option 2: Select Document to Access “Actions” Menu

After accessing an employee’s list of personnel files and selecting a document, you may click on the “Actions” menu to:

- **Open** the document viewer window
- **Preview** the document
- **Download** the document
- **Export** (this function exports the document properties, not the document itself)
- **Email Link** (to send the document to someone who does not have access to the document)



Depending on your access level, some actions may not be available.

Viewing a Personnel Document

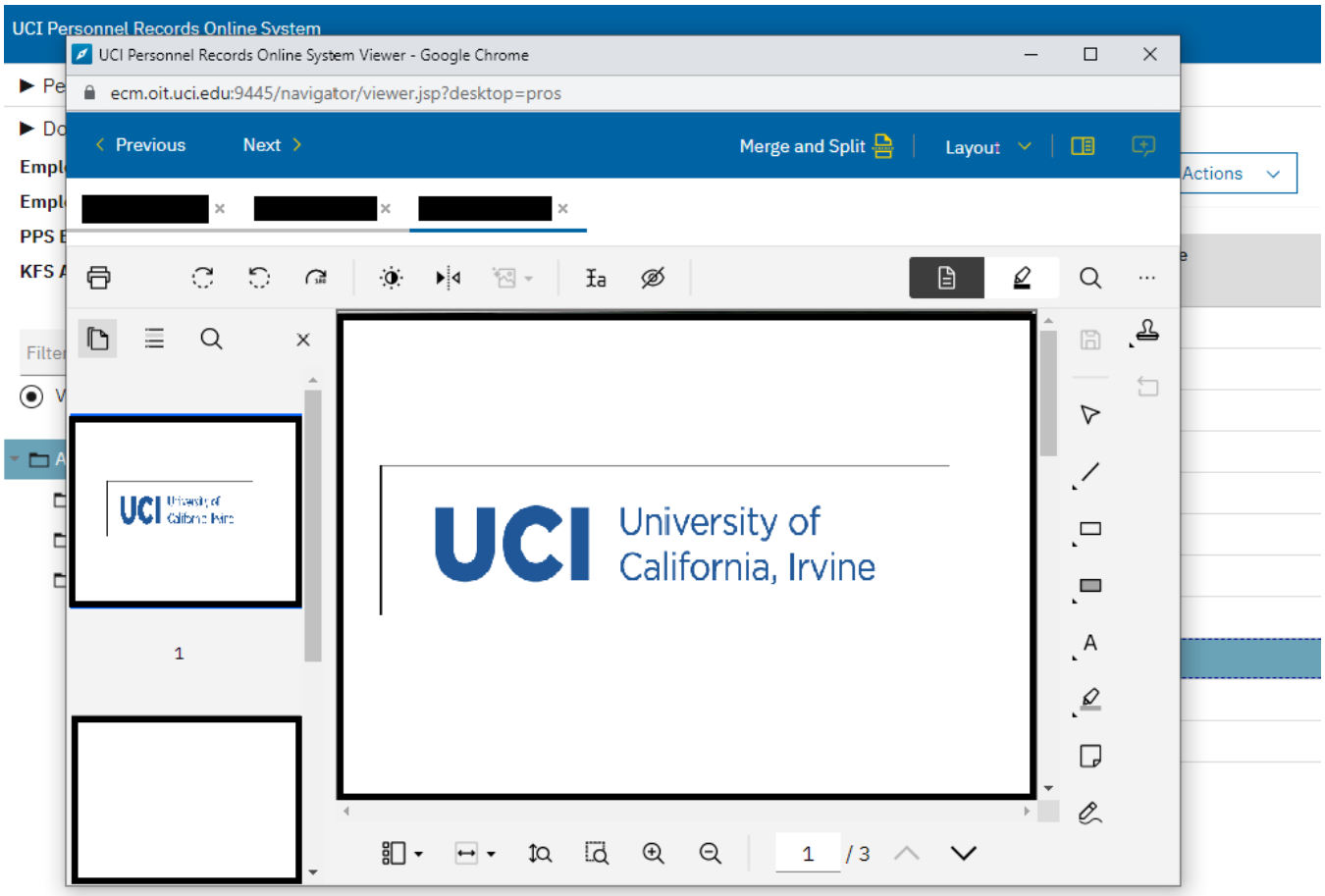
Option 3: Double-Click to Open Document Viewer Window

After accessing an employee's list of personnel files, double-click on the selected document to open the viewer window.

Document Viewer Window

Within the document viewer window, you may:

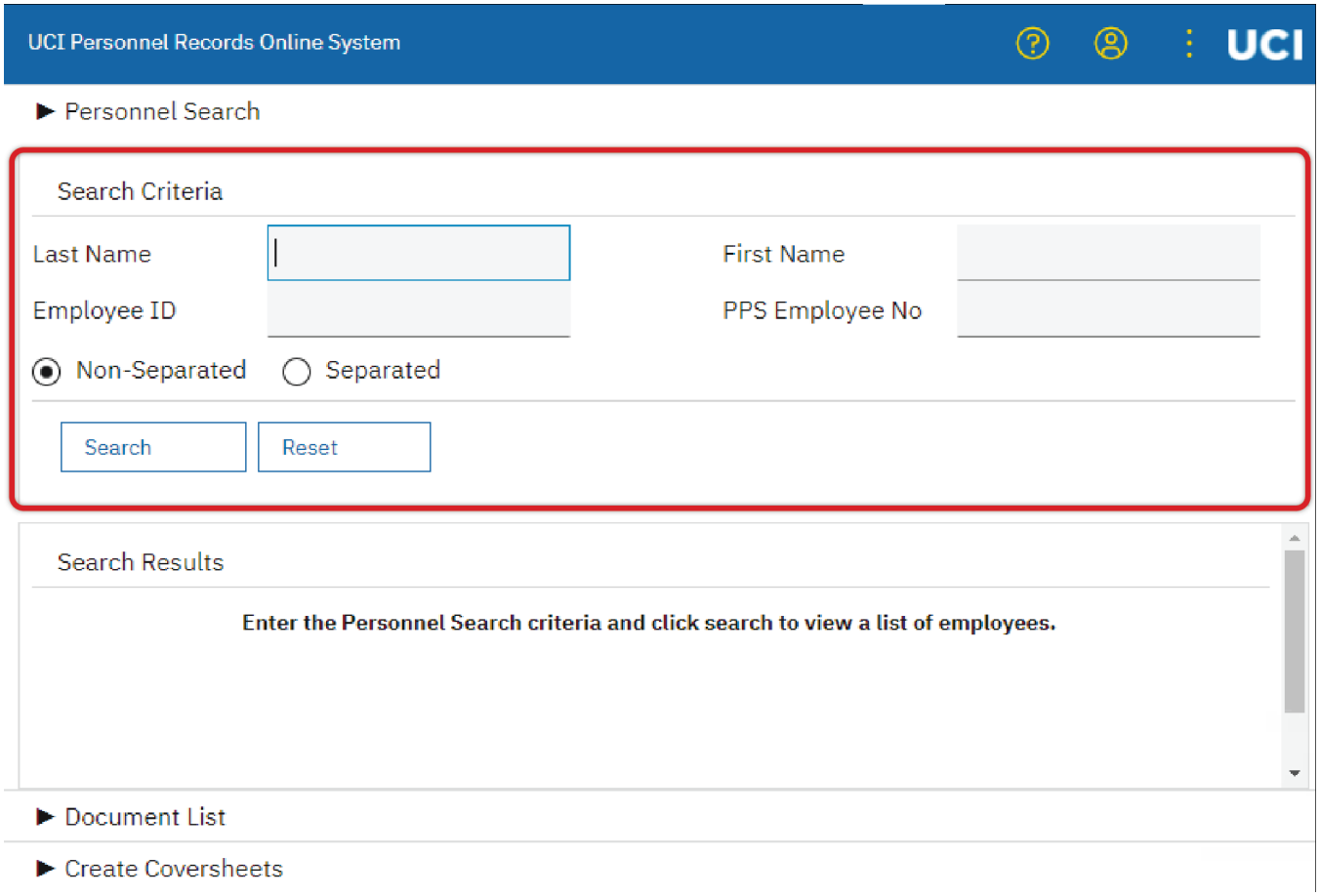
- Change the viewing option to display multiple pages
- Adjust magnification
- Rotate the page
- Print the document



Uploading Digital Files

Step 1: Input Employee Information under Search Criteria

Search for an employee by last name, first name, or employee ID (or with a combination of the three).



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Uploading Digital Files

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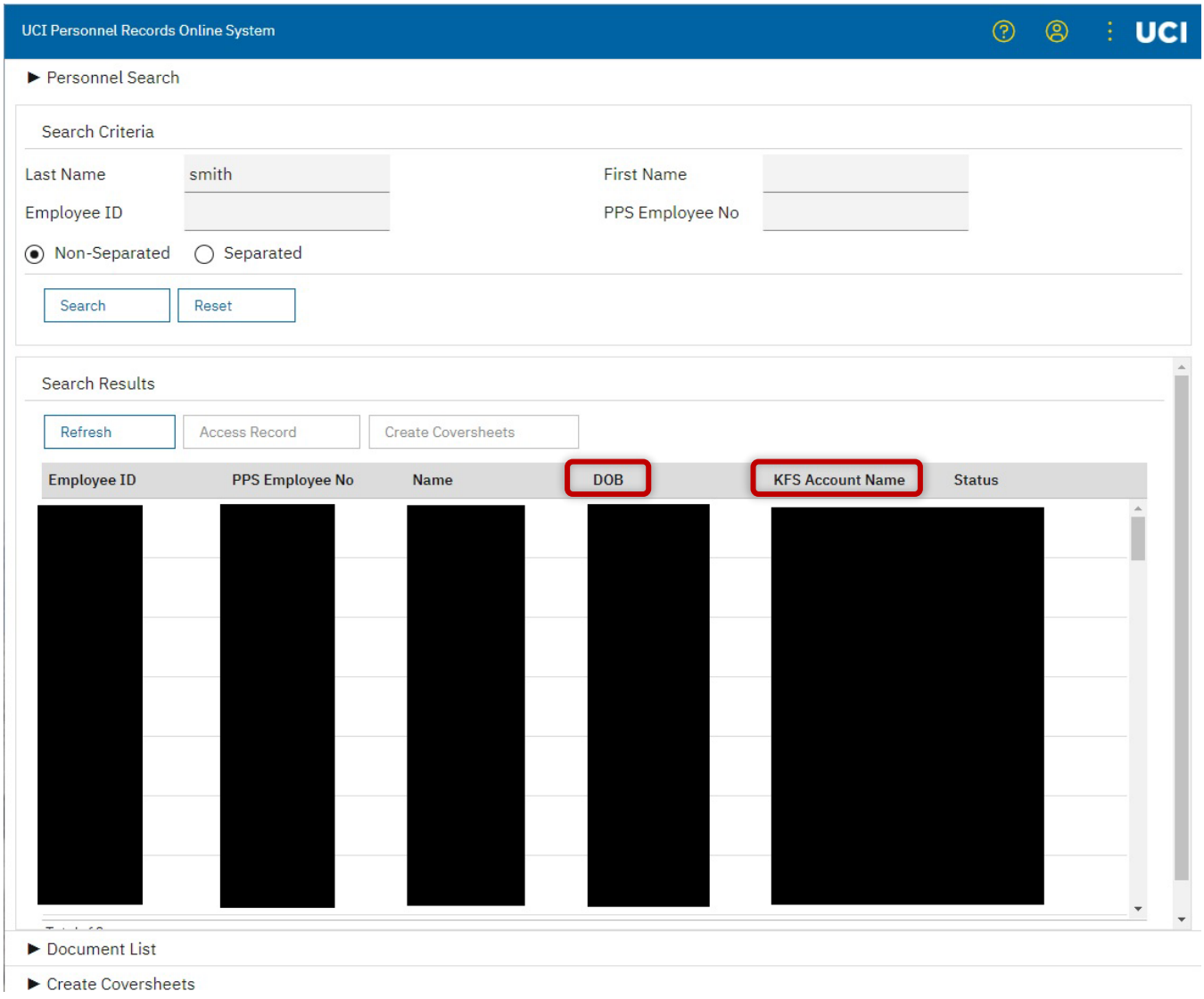
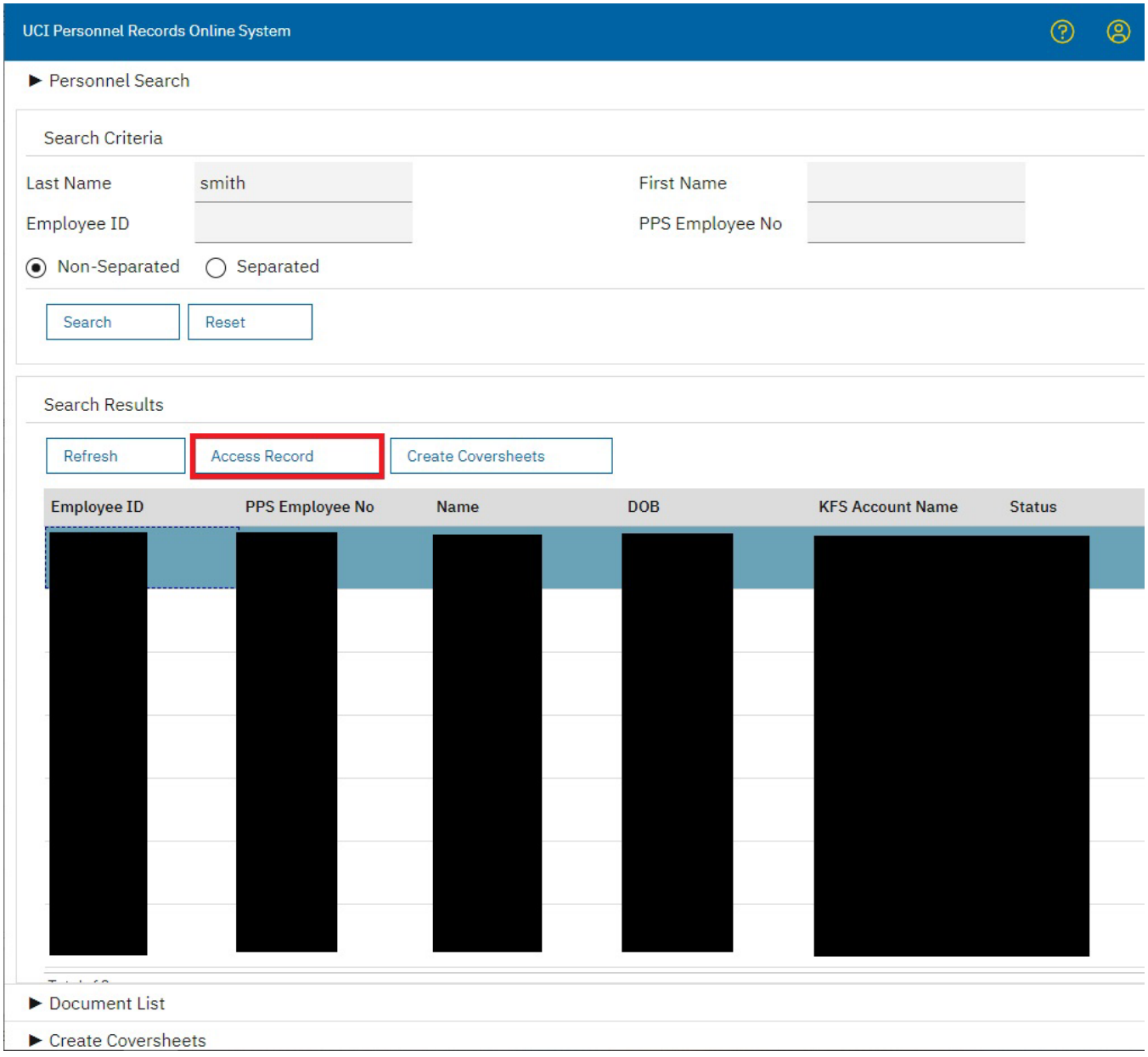


Uploading Digital Files

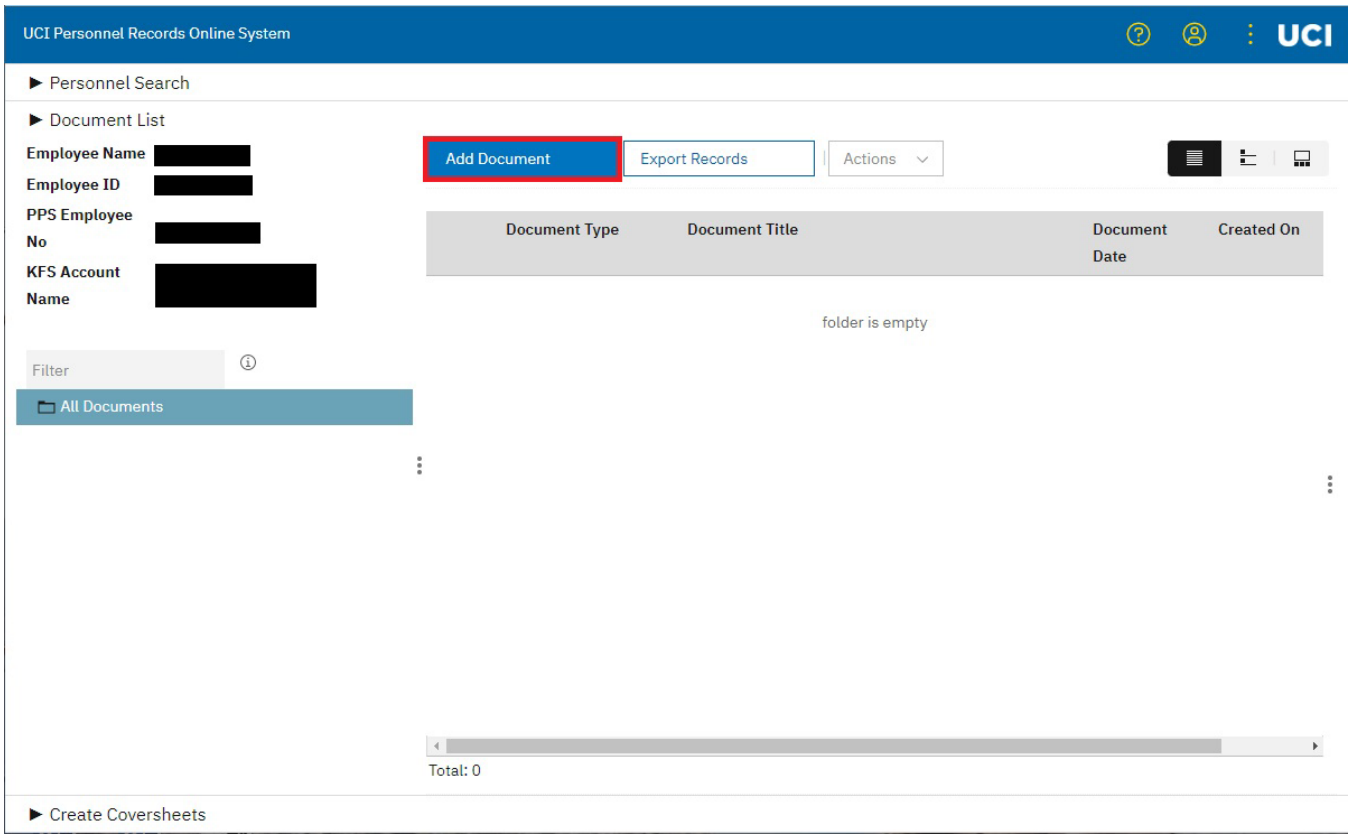
Step 3: Select Employee and Click “Access Record”

Selecting an employee profile will highlight that entire row.



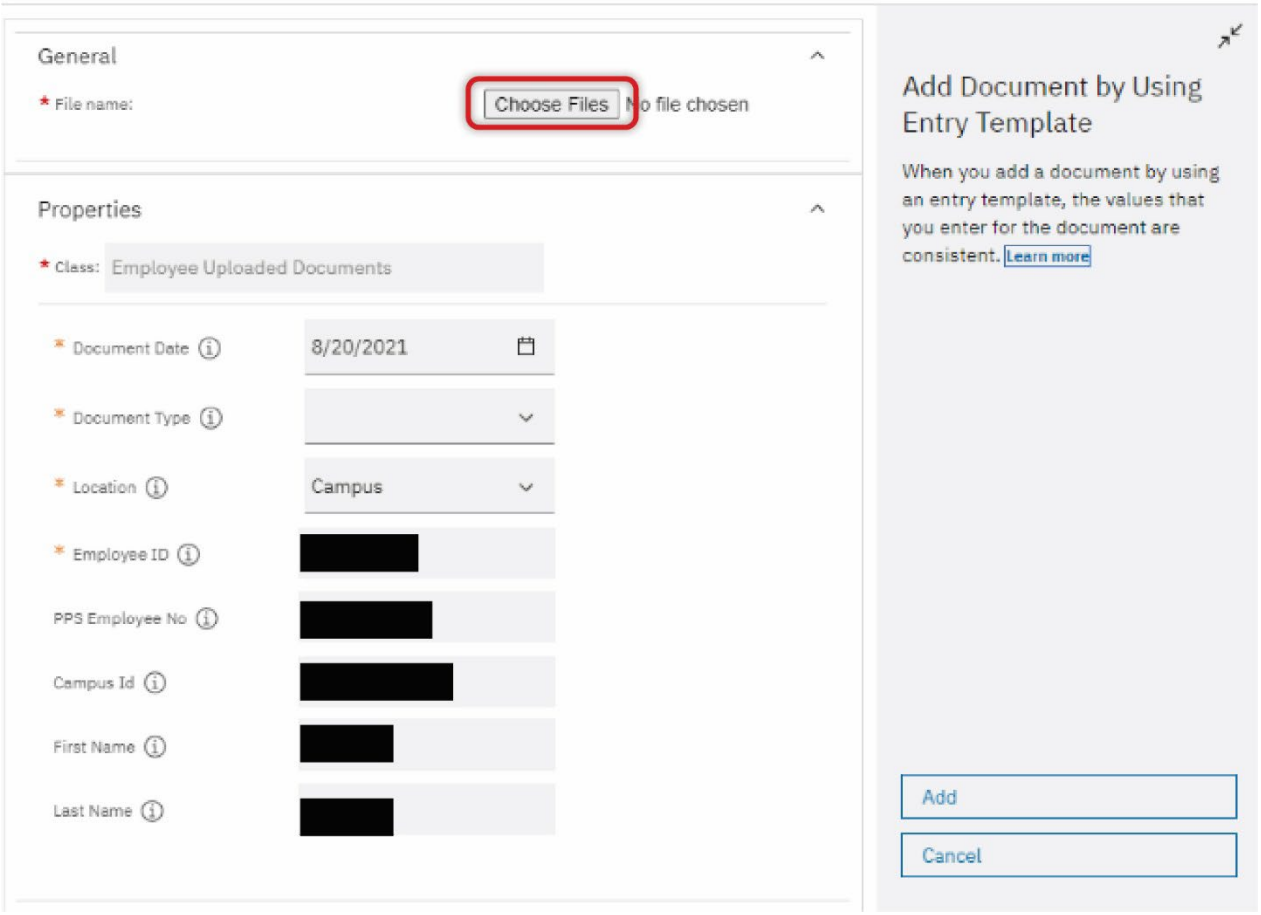
Uploading Digital Files

Step 4: Click “Add Document”



Uploading Digital Files

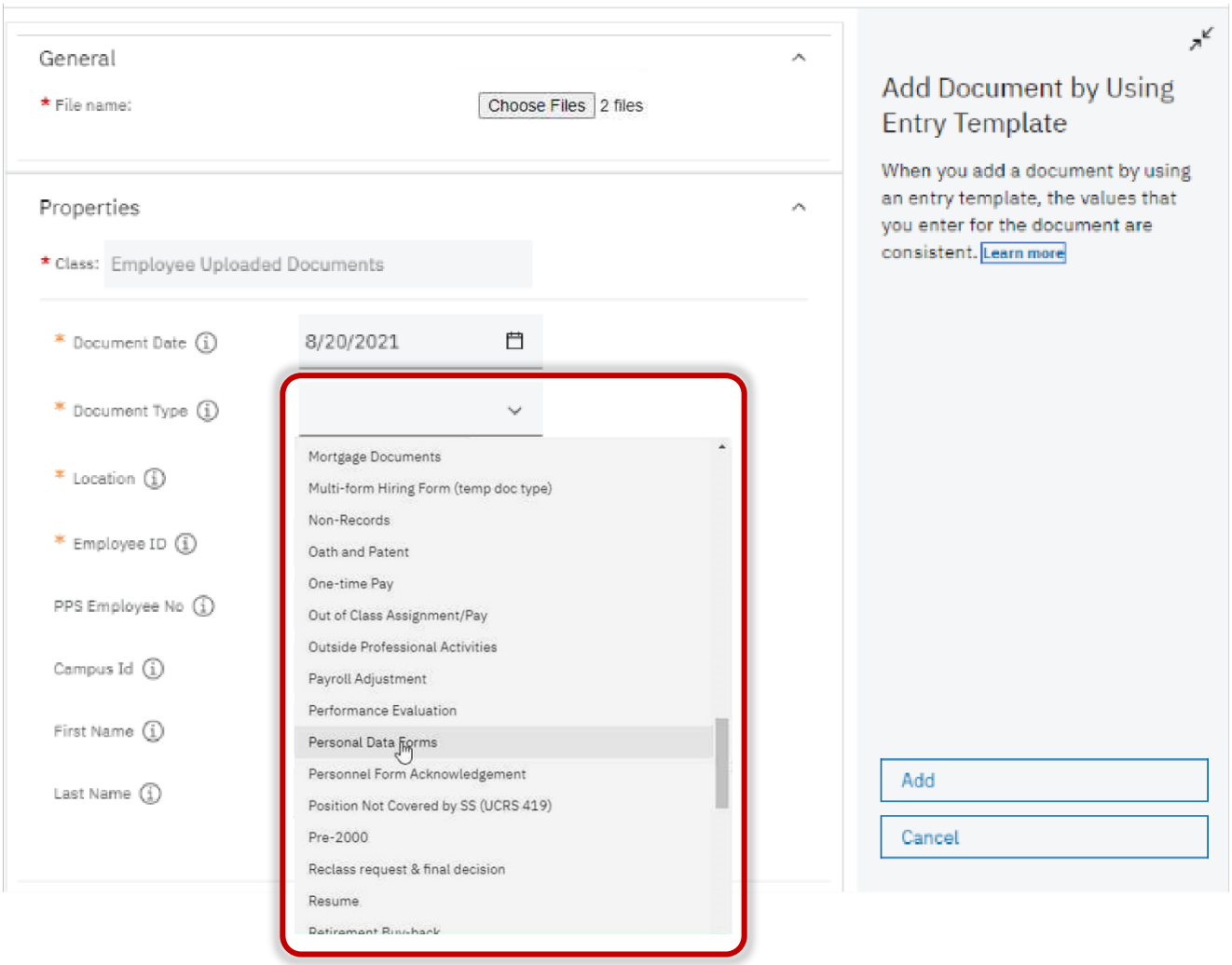
Step 5: Choose File(s) to Upload



Only one document type may be uploaded at a time.

Uploading Digital Files

Step 6: Select Document Type

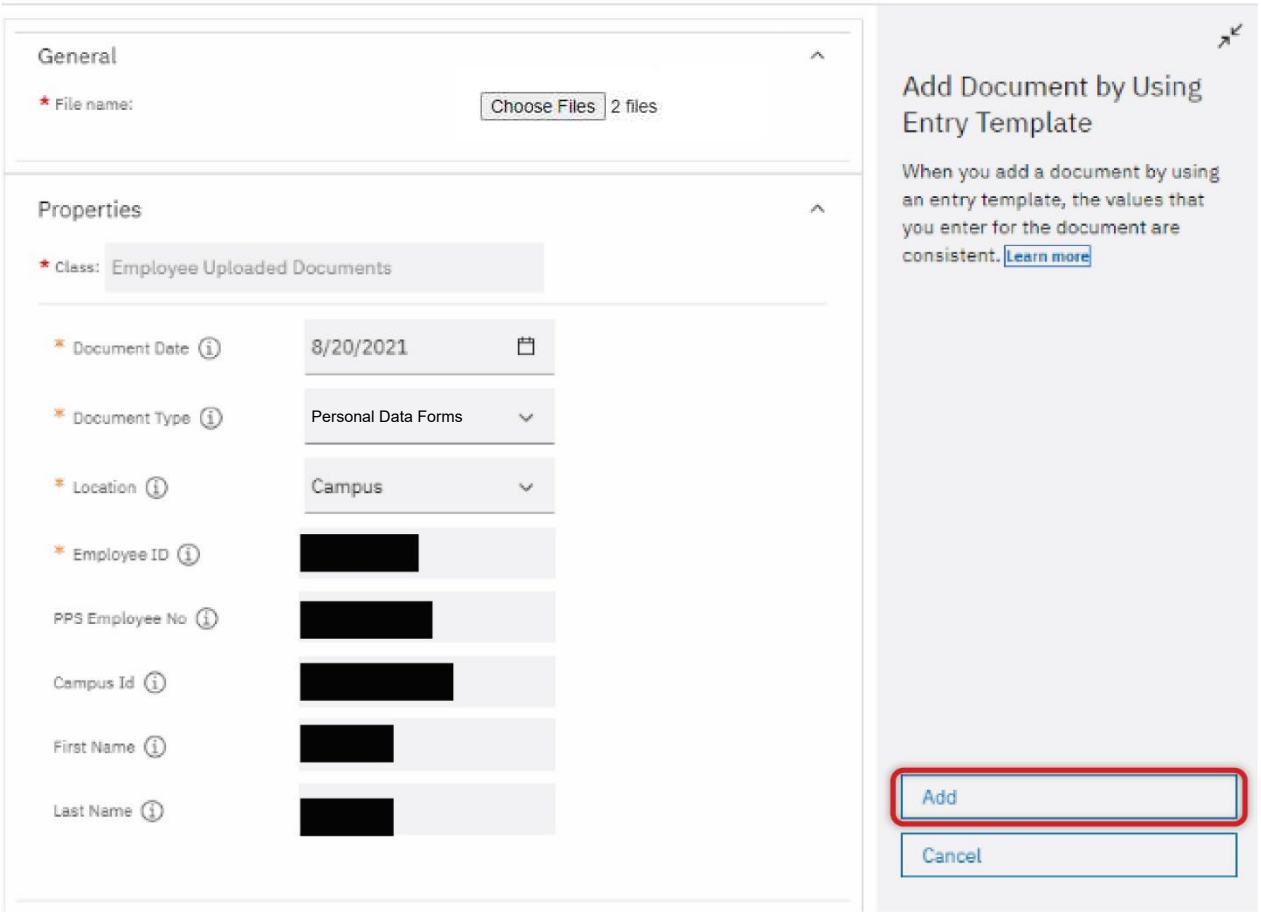


Uploading Digital Files

Step 7: Confirm Document Properties and Click “Add”

Auto-populated data may be corrected as necessary.

Clicking “Add” will automatically route chosen file(s) to the PROs verification queue.



Added file(s) will be uploaded to PROs after UCI Document Management review and verification.

Creating an Indexing Form (Coversheet)

For physical files, a printed indexing form is required for each document type.

Step 1: Input Employee Information under Search Criteria

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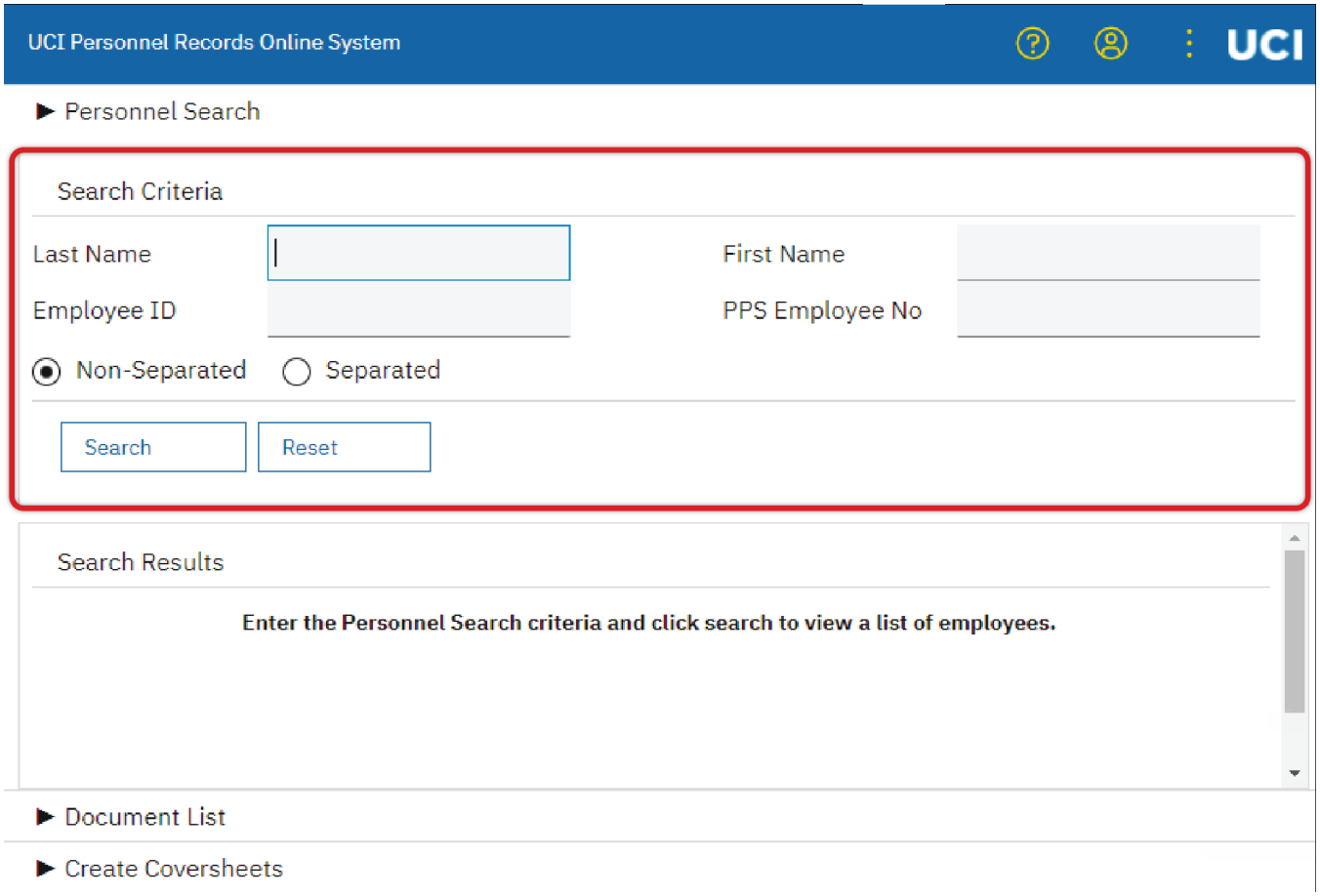

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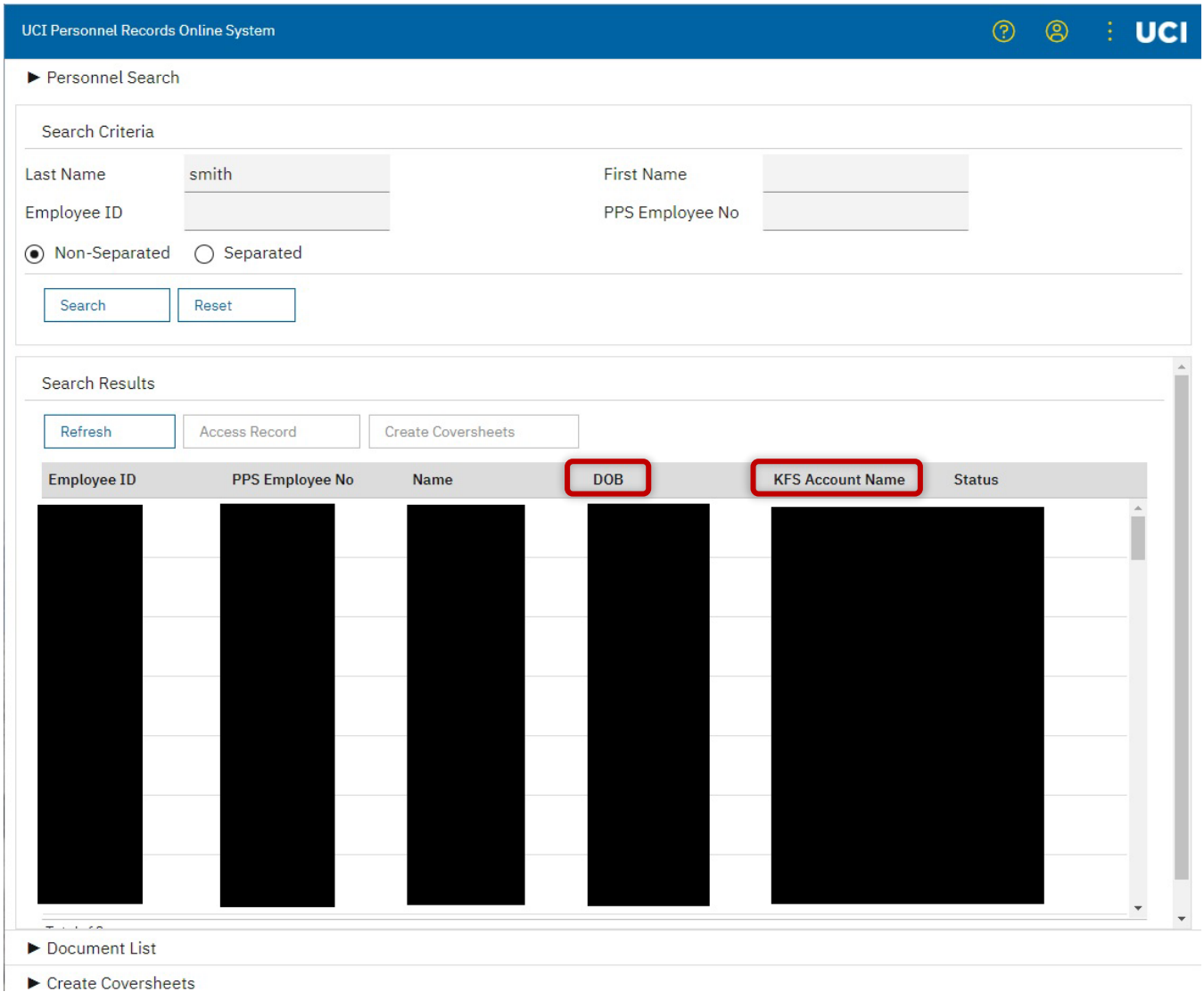
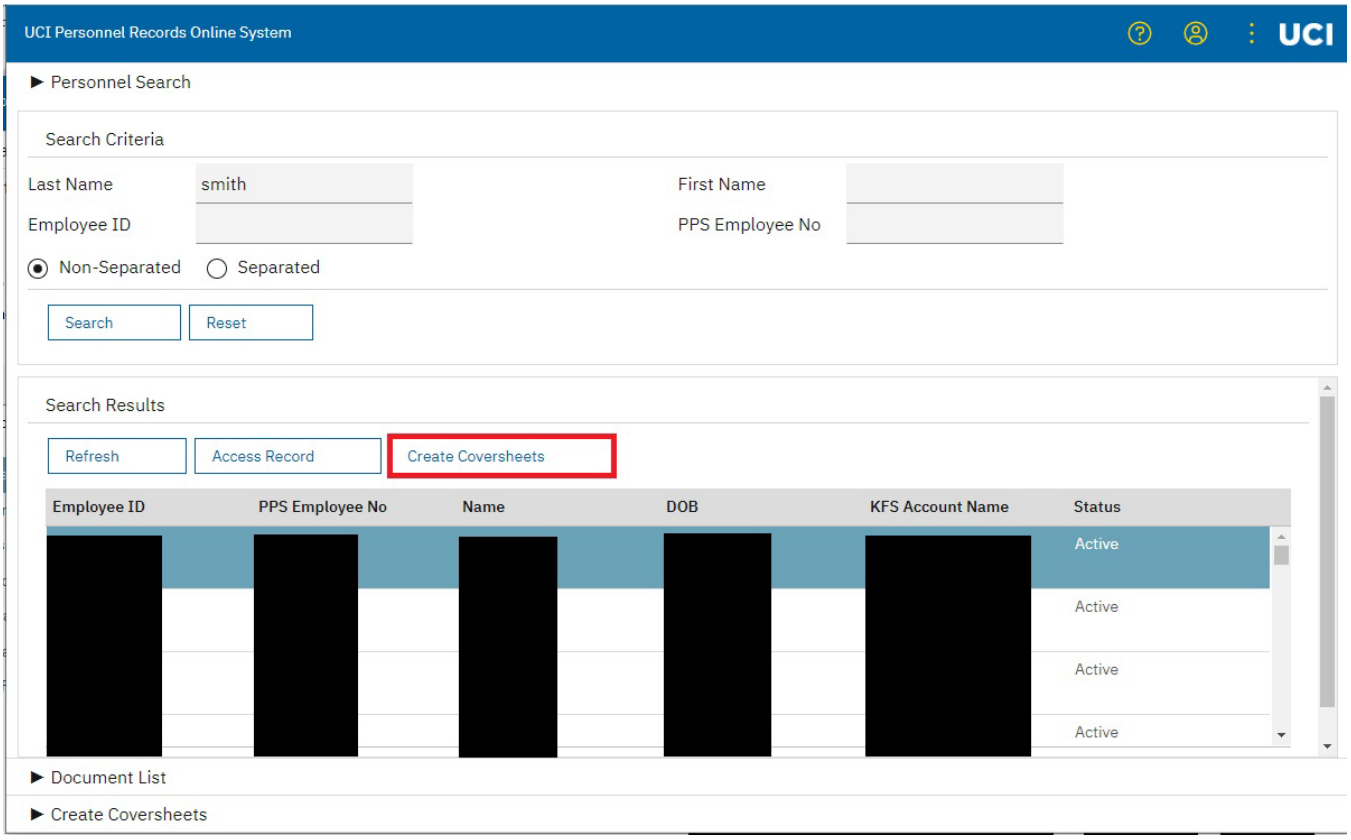


Creating an Indexing Form (Coversheet)

For physical files, a printed indexing form is required for each document type.

Step 3: Select Employee and Click “Create Coversheets”

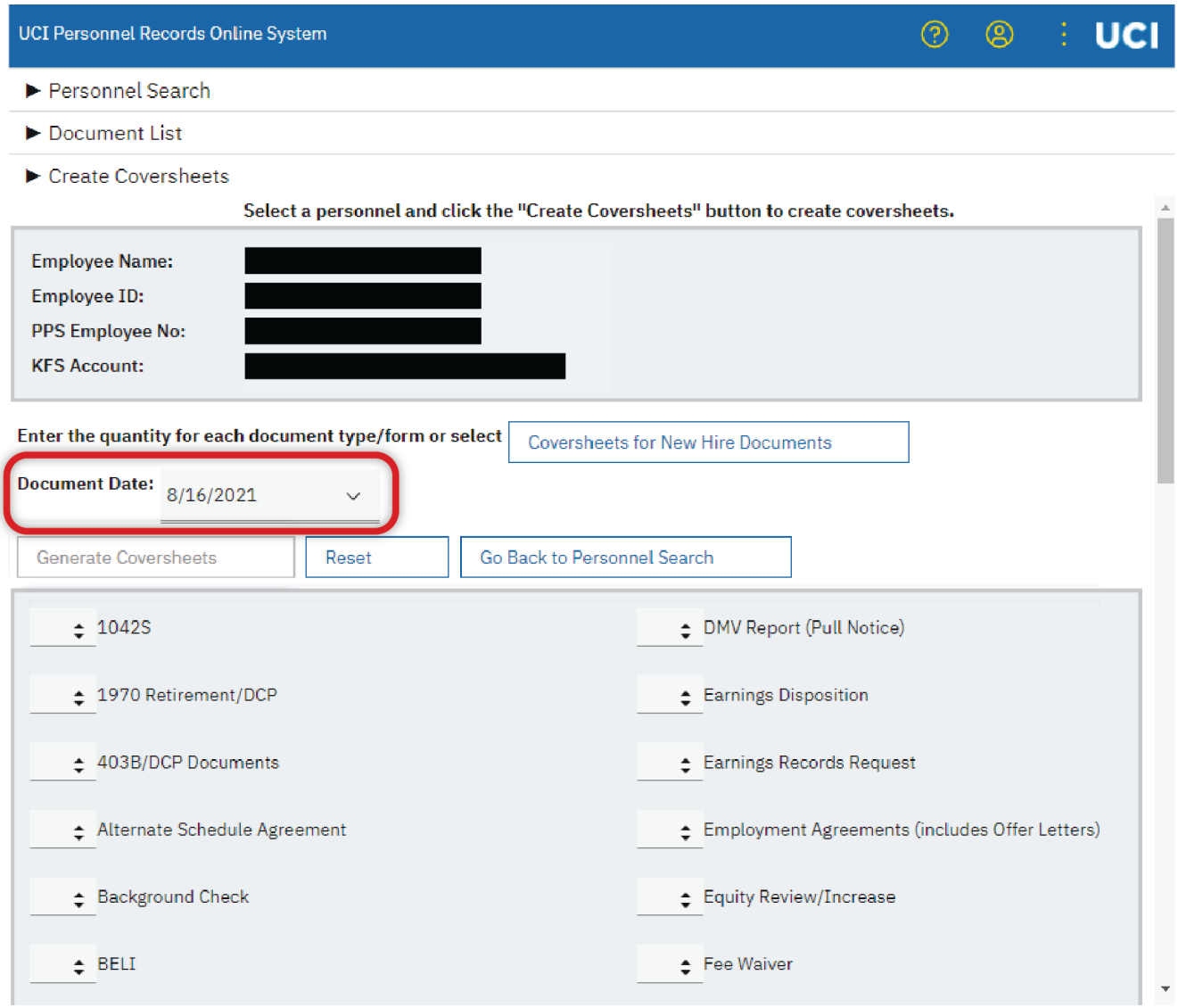


Creating an Indexing Form (Coversheet)

For physical files, a printed indexing form is required for each document type.

Step 4: Input Document Date

This is the date that the document was officially signed or printed. If you are preparing a indexing form for a later sign date, leave this empty and write the date on the printed form with a black-ink pen.

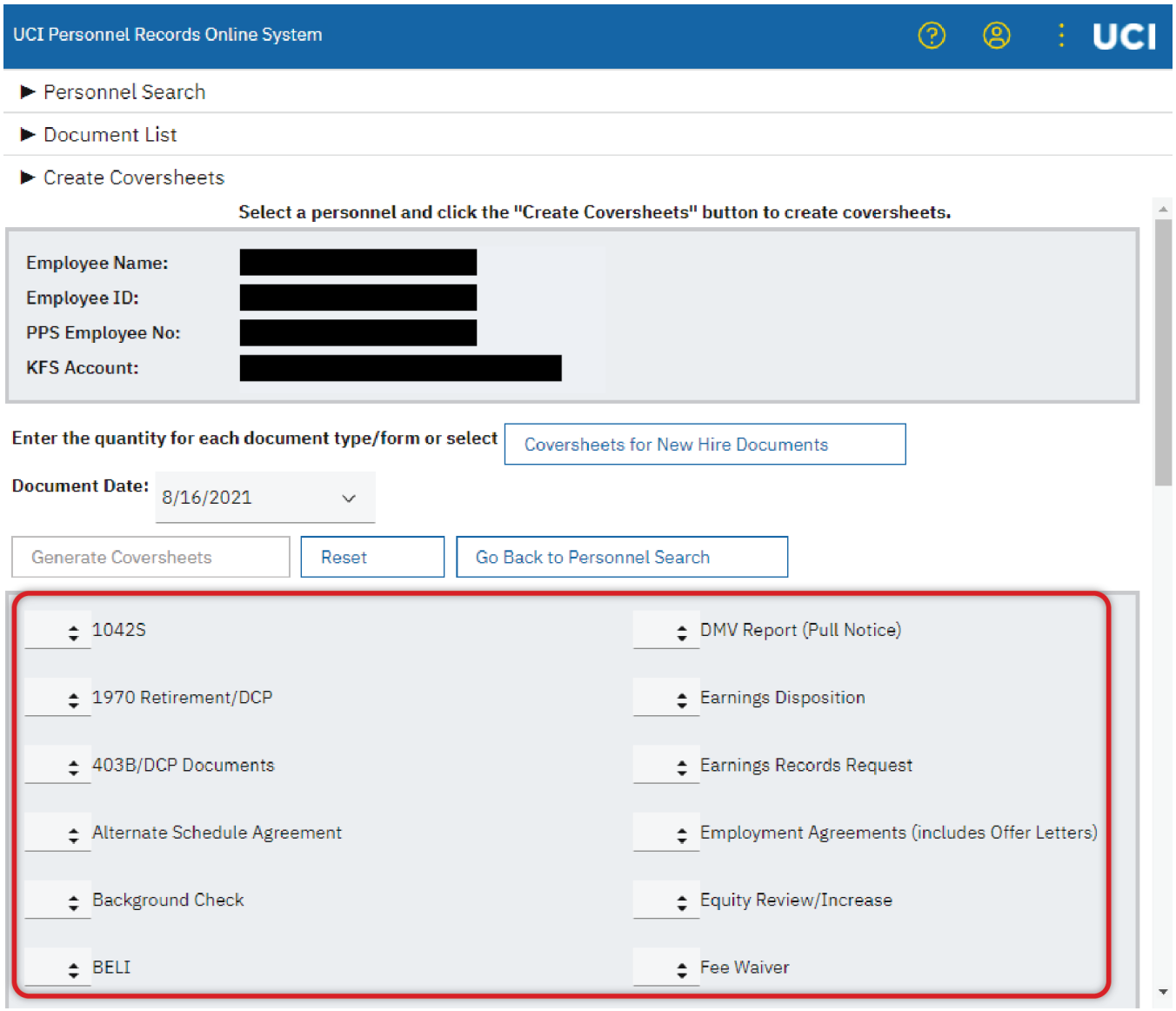


Creating an Indexing Form (Coversheet)

For physical files, a printed indexing form is required for each document type.

Step 5: Specify Document Type

Multiple coversheet copies may be generated for various document types in a single session.



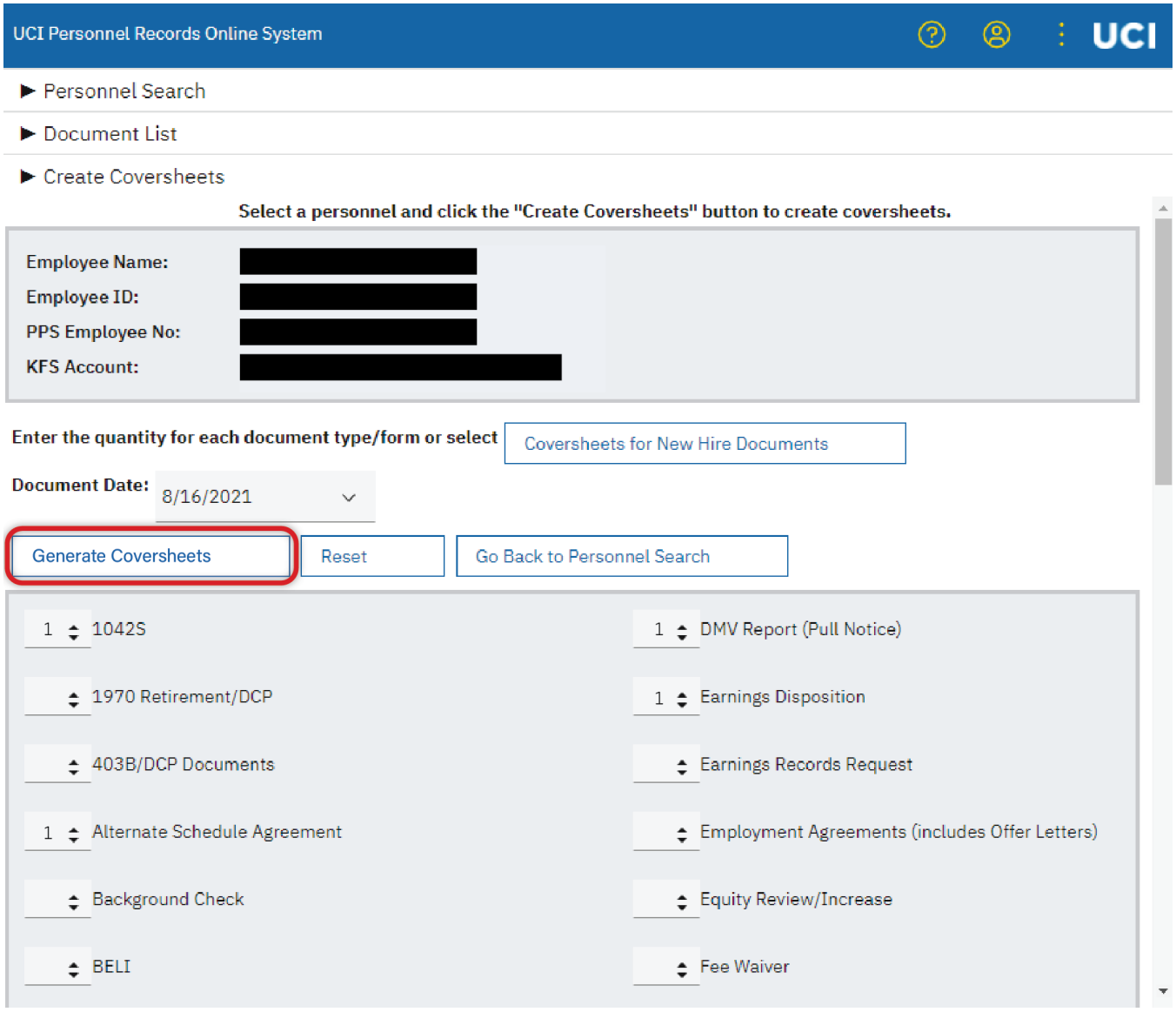
Click “Coversheets for New Hire Documents” to automatically select the documents that are typically included in the new hire process.

Creating an Indexing Form (Coversheet)

For physical files, a printed indexing form is required for each document type.

Step 6: Specify Document Type

Once the document type and quantity have been specified, click on “Generate Coversheets.” The selected indexing forms will open as PDF files for you to print.



PROs File Preparation Checklist and Guidelines for Submitting Physical Documents

- ☐ Remove all staples and paper clips.
- ☐ Scotch tape all 4 sides of small items (such as post-it notes and jury notices) to an 8½" x 11" sheet of paper.
- ☐ Separate carbon copy forms and only submit the most legible copy for scanning.
- ☐ Submit only paper and lightweight card stock for scanning.
- ☐ Unfold corners and documents larger than 8½" x 11"
- ☐ Every document requires its own coversheet indexing form. Do not use one coversheet indexing form for multiple documents.
- ☐ Ensure that all the documents being prepared for scanning belong to the employee whose file you are preparing.
- ☐ The document date on the cover sheet is the date that the document was printed or signed. It is not the date the document was prepared for PROs.

To help us process documents faster and more accurately:

- Scanning batches may have multiple document types and multiple employees; ensure each document has its own coversheet.
- Each batch of files should be no thicker than 3 inches.
- Rubber bands are ideal to hold large batches while binder clips are ideal for small batches.
- Historic I-9's should be placed on top of the batch. I-9's digitally created should not be printed and sent to PROs.
- Batches must be sent to scanning in a secure Personnel File Transfer envelope.
- Remove any documents that should not be included in the personnel file. Examples of such a document are the 'Demographic Data Transmittal and Voluntary Self-Identification of Race, Ethnicity and Veteran Status forms.

Any questions, please call Document Management at (949)-824-4147.