Personnel Records
Online System
(PROs) User Manual

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PROs uses Duo Multi-Factor Authentication. Log in with your UCInetID and password.
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.
Step 1:

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.
Step 2:

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.”

Click on the employee name to access their personnel file or to create indexing forms (coversheets).
Step 1:

Once the correct employee has been selected, click “Access Record” to access their personnel file.
Step 2:

By default, all available documents are displayed. You may select individual document types to filter the displayed documents.

Depending on your access level, certain documents will not be shown.
Step 3:

Click on the file to see its document properties or double click to view the document.
After selecting a file, you may click on the “Actions” menu to access the following options:

- **Open** the document
- **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.
Document Viewer

Double click or select “Open” from the Action menu to view the document. Within the document viewer window, you may:

- Change the viewing option to display multiple pages
- Adjust magnification
- Rotate the page
- Print the document
Step 1:

Create an Indexing Form (Coversheet) from the Personnel Search tab. Use the search function and identify the employee. Once you have selected the correct employee, click on “Create Coversheets.”
Create Indexing Form (Coversheet)

Step 2:
Select the types and quantities of coversheets needed.

- Click “Coversheets for New Hire Documents” to automatically select the documents that are typically included in the new hire process.
Create Indexing Form (Coversheet)

**Step 3:**

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

Step 1:

Select the employee whose document is being uploaded. Refer to the section on Personnel Search for details.

![Personnel Search](image.png)
Step 2:

Once the correct employee has been selected, click “Access Record” to access their personnel file.
Upload Digital Files

Step 3:

Click on “Add Document” to activate a digital indexing form.
Upload Digital Files

Step 4:

Select a document to upload.
Upload Digital Files

**Step 5:**

Fill in the document properties.

Location indicates where the PROs document belongs to. This is used for ingestion from a DocuSign template.
Upload Digital Files

Step 6:

Click “Add” to upload the document into the PROs verification queue.

Uploaded documents will appear in the personnel file once it has been verified by UCI Document Management.