

eHRFile

Core HR
Training and Reference Guide

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University of Missouri System

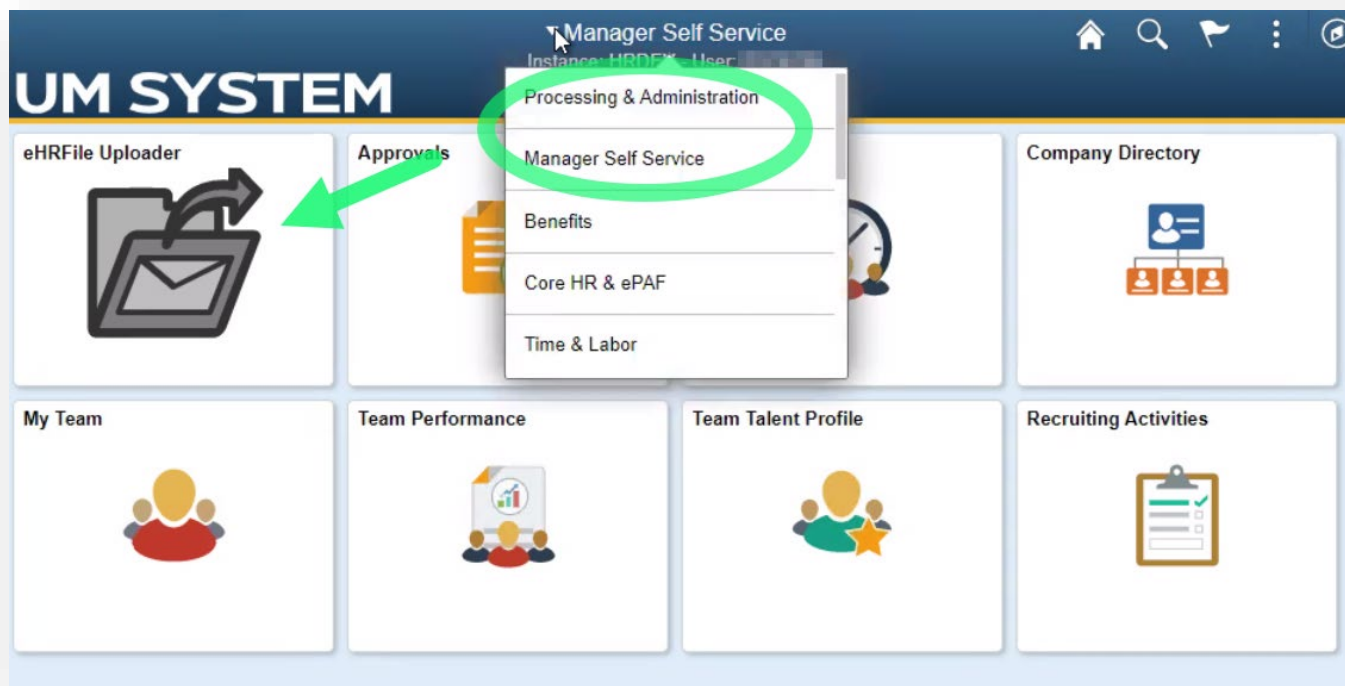
eHRFile Uploader

Upload and submit a secure file

In this training example, we demonstrate how to add a secure file using the eHRFile Uploader.

1. Log into hrprd.umssystem.edu.

From either the **Manager Self Service** or **Processing & Administration** homepage, click the **eHRFile Uploader** tile.



2. The **eHRFile** page opens.
 - a. In the **eHRFile Uploader** menu on the left side of the page, select the **Add an eHRFile Secure Document** sub-menu item.
 - b. Enter search criteria in one of the fields.
NOTE: When searching the **Name** field, it must be entered as mixed case (*Last name,First name*, e.g. Mouse,Mickey) with NO SPACE after the comma.
 - c. Click the **Search** button.

The screenshot displays the 'eHRFile' interface within the 'UM SYSTEM'. The top navigation bar includes 'Manager Self Service' and 'eHRFile'. The left sidebar shows the 'eHRFile Uploader' menu, with 'Add an eHRFile Secure Document' selected. The main content area features a search form with the following fields and options:

- Search by: (dropdown)
- Empl ID: Begins With (dropdown), 0711 (input field)
- Empl Record: is Equal To (dropdown)
- Name: Begins With (dropdown)
- Last Name: Begins With (dropdown)
- Department: Begins With (dropdown)
- Employee Group: Begins With (dropdown)

At the bottom of the search form are 'Search' and 'Clear' buttons.

- Results appear below the search fields. Click the row of the record to which you will upload a secure document.
- On the **Add eHRFile: eHRFile Secure Document Upload** page, verify that the employee listed corresponds with the document you are uploading.

Search Clear

Empl ID	Empl Record	Name	Last Name	Department
1 0711	0			AHRISDPT
2 0711	1			AAITSERV

Then click the **Upload** button.

UM SYSTEM eHRFile

Back Add eHRFile : eHRFile Secure Document Upload Form ID 3033198

Employee Information

Empl ID [redacted] Department AHRISDPT HRIS Department
 Name [redacted] Business Unit UMSYS
 Empl Record 0

File Attachments 1 row

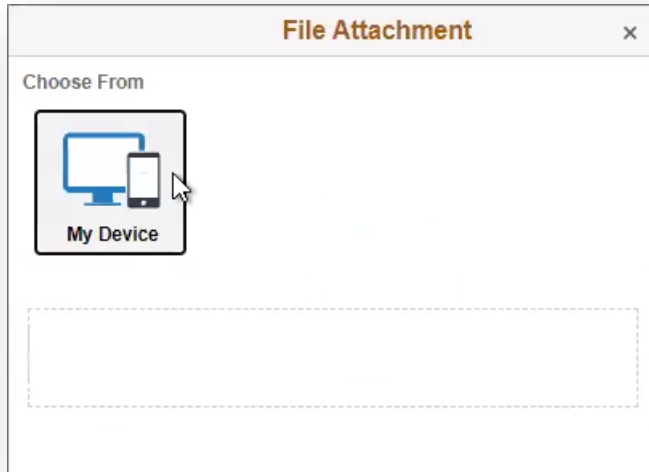
Status	Action	Description	File Name	Delete
1	Upload			Delete

Add

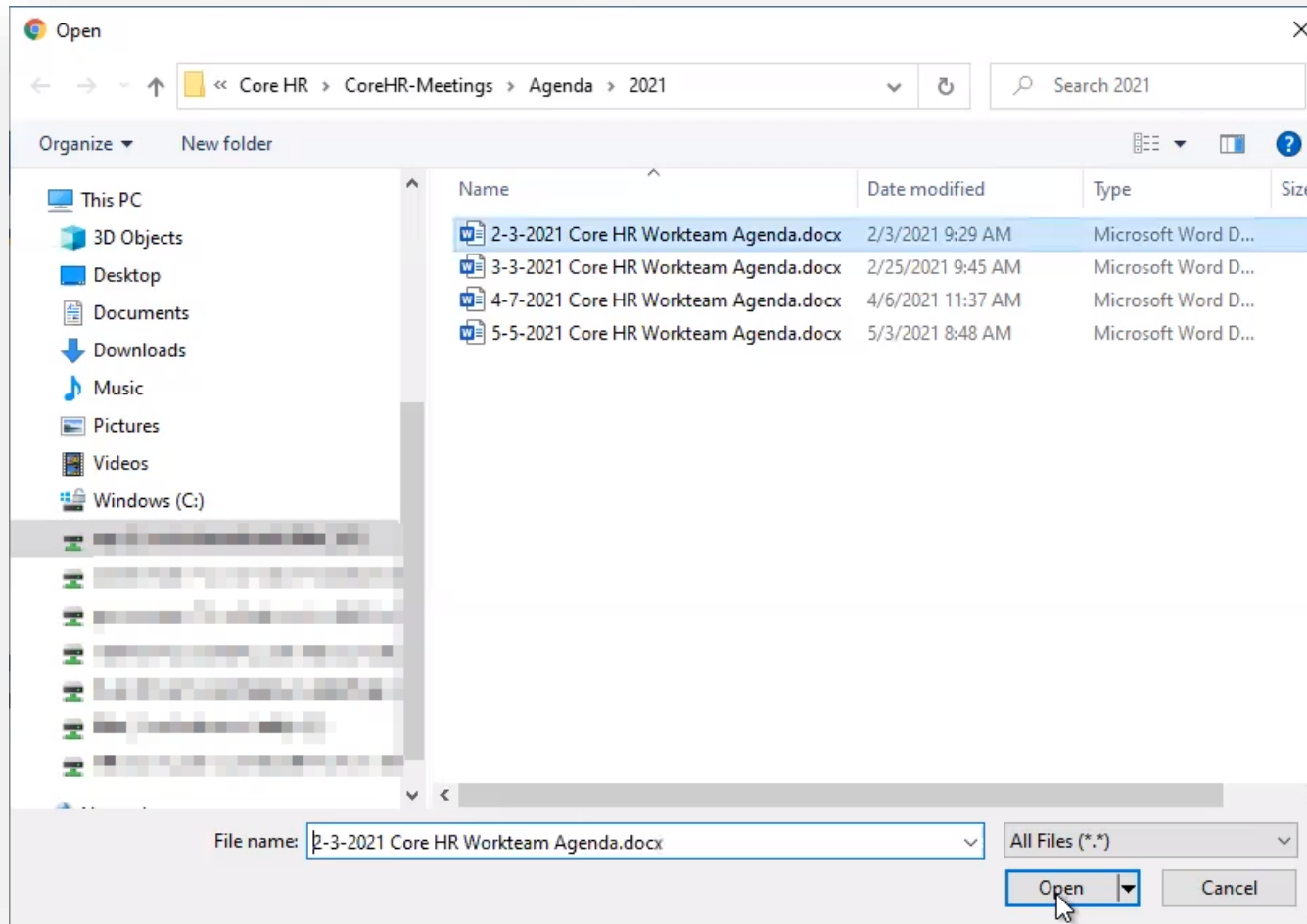
Comments

Search Save Submit

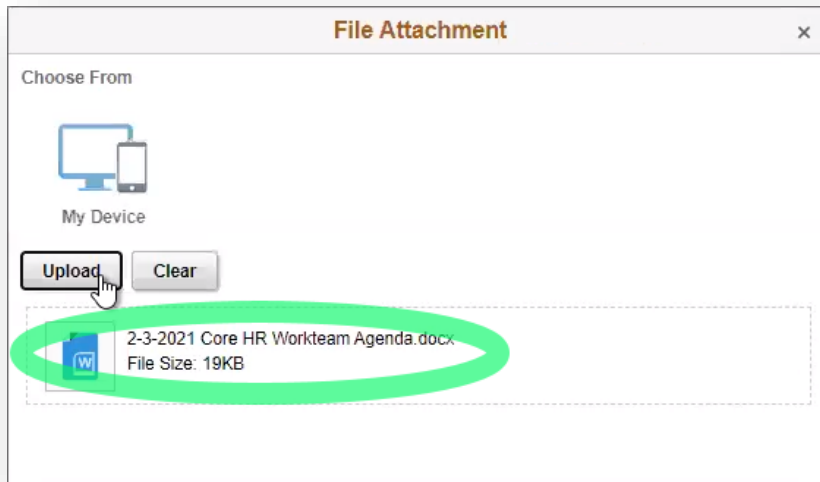
5. In the **File Attachment** window that appears, select the **My Device** icon.



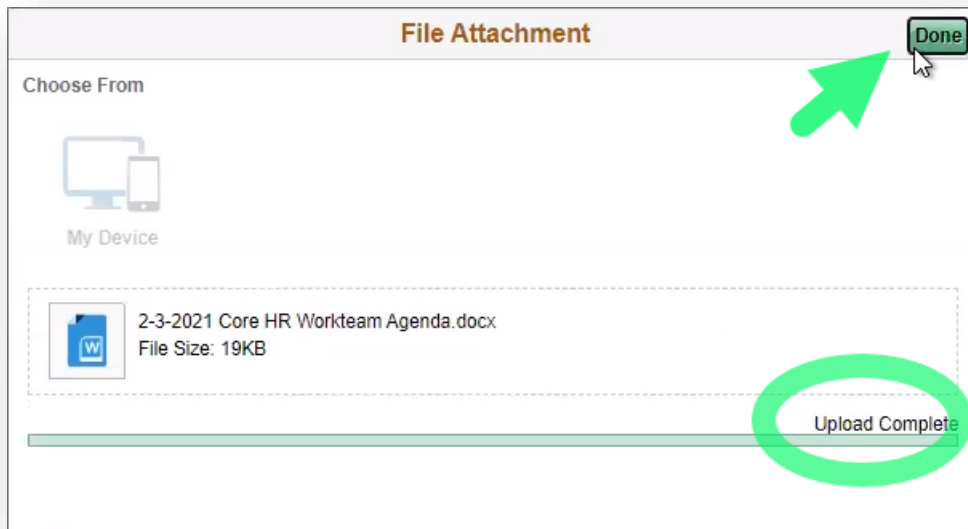
6. In the **Open** dialog window that appears, select the appropriate document, and then click the **Open** button.



7. Verify that the document listed in the File Attachment window is the document you intended to select. If it is, click the **Upload** button.



8. When the file upload is complete, click the **Done** button.



- The uploaded file appears in the **File Attachments** section of the Add eHRFile page. Expand the **Descriptions** option menu and select the appropriate document type.

The screenshot displays the 'eHRFile' interface for the 'UM SYSTEM'. At the top, there is a 'Back' button and the 'eHRFile' title. Below this is a section for 'Add eHRFile : eHRFile Secure Document Upload'. The 'Employee Information' section shows fields for 'Empl ID', 'Name', 'Empl Record' (0), 'Department' (AH), and 'Business Unit' (UM). The 'File Attachments' section contains a table with columns for 'Status', 'Action', 'Description', and 'File Name'. A single row is visible with a status of '1' and a green checkmark, a 'View' button, and a file name starting with '2-3-2021_Cc'. A dropdown menu is open under the 'Description' column, listing various document types such as 'Post offer employment testing', 'Probationary letters-related docs', 'Relocation and hiring allowance', 'Resume and other application docs', 'Separation ltrs and agreements' (which is highlighted in blue), 'Student loan repayment program', 'Transcripts and certifications', 'Tuition & related incentive benefit', 'Unemployment correspondence', and 'Unknown'. Below the table, there are buttons for 'Add', 'Search', 'Save', and 'Submit', along with a 'Comments' section.

10. You may upload another document by clicking the **Add** button and repeating the steps outlined above. If desired, you can expand the **Comments** section to add comments. When you're finished adding documents, click the **Submit** button.

File Attachments

Status	Action	Description	Instructions
1 <input checked="" type="checkbox"/>	<input type="button" value="View"/>	Separation ltrs and agr	Drawer- X HR EMPLOYMENT FILE (CONF Examples- Resignation, termination and non exit checklist and off-boarding materials, etc
2 <input checked="" type="checkbox"/>	<input type="button" value="View"/>	HLC	Drawer- X HR EMPLOYMENT FILE (eHRFi Examples- Higher Learning Commission (H

Comments

11. The **Add eHRFile : Results** page appears, confirming the successful submission of your eForm. The document or documents are then routed to the individuals listed as approvers; once approved, it is stored in the Perceptive Content application.

The screenshot shows the 'Add eHRFile : Results' page. At the top right, it displays 'Form ID 3033198'. Below the header is a light blue success message: 'You have successfully submitted your eForm. The eForm has been routed to the next approval step. multiple approvers.' A 'Refresh' button is located to the right of the message. Below the message is a 'View Approval Route' button. Underneath is a section titled 'Transaction / Signature Log' with a '1 row' indicator. The table below contains one row of data.

Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1 05/07/2021 11:40:32AM	Initiated	[Redacted]	[Redacted]	Submit	

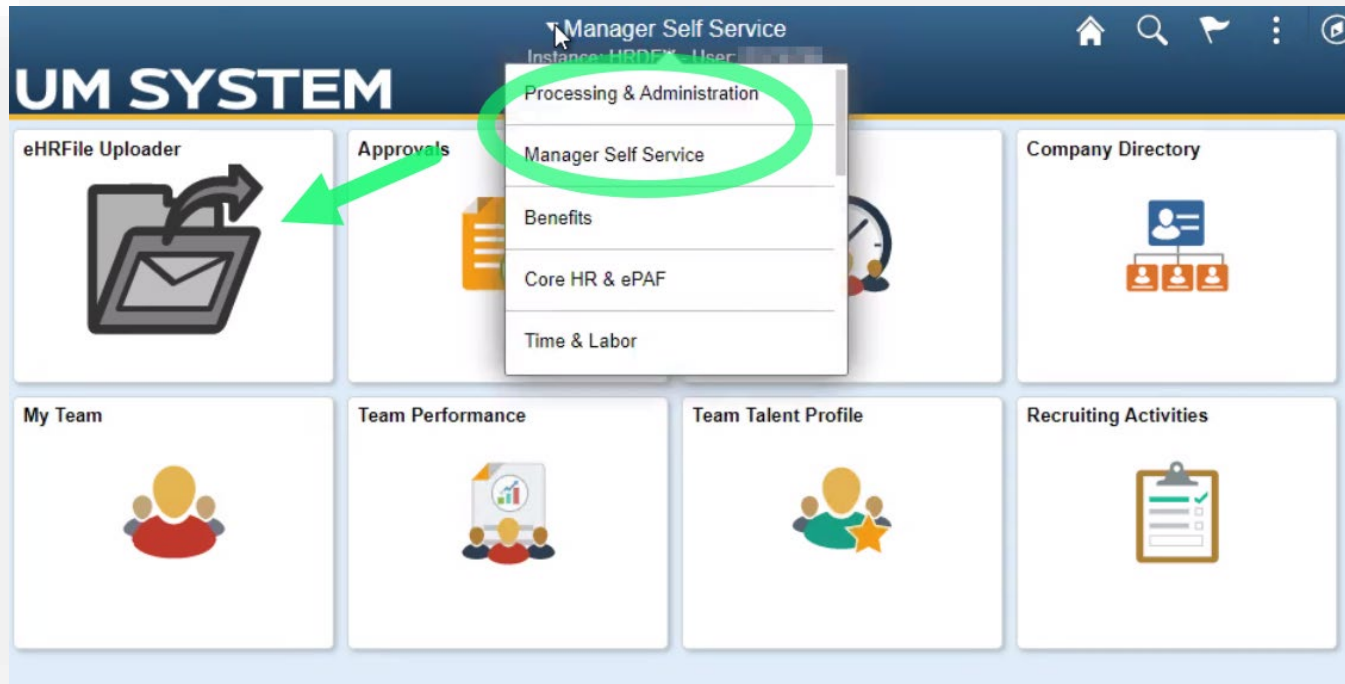
End of procedure.

Evaluate and approve a secure file in eHRFile Uploader

The following procedure demonstrates how an approver reviews and approves a file once a document is submitted.

1. If you are an approver and receive an email notification of a document submitted for your review, log into hrprd.umsystem.edu.

From either the **Manager Self Service** or **Processing & Administration** homepage, click the **eHRFile Uploader** tile.



2. The eHRFile page appears.
 - a. In the **eHRFile Uploader** menu on the left side of the page, select the **Evaluate an eHRFile Secure Doc** sub-menu.
 - b. Enter search criteria into the appropriate field(s) or select EHRFILE in the **Form Type** field to return all eHRFile documents.
NOTE: When searching the **Name** field, it must be entered as mixed case (*Last name,First name, e.g. Mouse,Mickey*) with NO SPACE after the comma.
 - c. Click the **Search** button.

The screenshot displays the 'eHRFile' interface within the 'UM SYSTEM' 'Manager Self Service' portal. On the left, a navigation menu under 'eHRFile Uploader' has 'Evaluate an eHRFile Secure Doc' selected, indicated by a green circle 'a'. The main content area features a search form with the following fields and options:

- Search by:** (indicated by green circle 'b')
- Form ID:** Begins With []
- Form Type:** Begins With [EHRFILE]
- Form Status:** is Equal To []
- Department:** is Equal To []
- Empl ID:** Begins With []
- Empl Record:** is Equal To []
- Business Unit:** Begins With []
- Name:** Begins With []

At the bottom of the search form, there is a green 'Search' button (marked with green circle 'c') and a grey 'Clear' button. A large blue watermark 'C' is overlaid on the right side of the interface.

3. Click the appropriate record from the results that appear below the search fields. (Note that if you searched the Form ID, the appropriate record opens directly.)

	Form ID	Form Type	Form Status	Department	Empl ID	Empl Record	Business Unit	Name	User ID	Original Operator	Original Date	Last Operator	Last Date
1	3031666	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-03-09	BOOKSH	2021-03-09
2	3031669	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-03-09	BOOKSH	2021-03-09
3	3031670	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-03-09	BOOKSH	2021-03-09
4	3031708	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-03-15	BOOKSH	2021-03-15
5	3032631	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-04-14	BOOKSH	2021-04-14
6	3032935	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-04-26	BOOKSH	2021-04-26
7	3032941	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-04-26	BOOKSH	2021-04-26
8	3032942	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-04-26	BOOKSH	2021-04-26
9	3033031	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-04-28	BOOKSH	2021-04-28
10	3033198	EHRFILE	Pending	AHRISDPT	07118207	0	UMSYS	Books,Heather E	(blank)	BOOKSH	2021-05-07	BOOKSH	2021-05-07

4. The **Evaluate eHRFile** page displays the information for the selected record.
 - a. Verify that the uploaded documents are attached to the correct employee.
 - b. Click the **View** button(s) to review the uploaded document(s).
 - c. Verify that the document type displayed in the **Description** column is appropriate.
 - d. If a document can't be approved as submitted, add comments indicating what needs to be changed, and click **Recycle** to return it to the initiator.
 - e. Click **Approve** if no edits are needed.

Note: The Deny button would only be used if the submitted document should not be added to an employee's personnel record. Comments should be added to explain why it is being denied.

UM SYSTEM eHRFile

Evaluate eHRFile : eHRFile Secure Document Upload

Employee Information

Empl ID [REDACTED] **a**

Name [REDACTED]

Empl Record 0

File Attachments

Status	Action	Description	Instructions
1 <input checked="" type="checkbox"/>	b View	Separation ltrs and agreements c	Drawer- X HR EMPLOYMENT FILE (CONFIDENTIAL) Examples- Resignation, termination and non-renewal letters; dismissal for cause; lay exit checklist and off-boarding materials, etc.
2 <input checked="" type="checkbox"/>	View	HLC	Drawer- X HR EMPLOYMENT FILE (eHRFile) Examples- Higher Learning Commission (HLC) related materials

Add

Comments **d** **e**

Search Deny Recycle Hold Approve

5. Once the upload is approved, the **Evaluate eHRFile : Results** page displays a list of actions on the selected document(s).

Evaluate eHRFile : Results Form ID 3033198

You have successfully approved your eForm. Refresh

[View Approval Route](#)

Transaction / Signature Log 3 rows

	Current Date Time	Step Title	User ID	Description	Form Action	Time Elapsed
1	05/07/2021 11:40:32AM	Initiated	BOOKSH	Books,Heather E	Submit	
2	05/07/2021 11:45:15AM	BOOKSH -> Books,Heather E + HORVATICHC -> Horva...	BOOKSH	Books,Heather E	Authorize	4 minutes
3	05/07/2021 11:45:19AM	System	System	Execute		< 1 minute

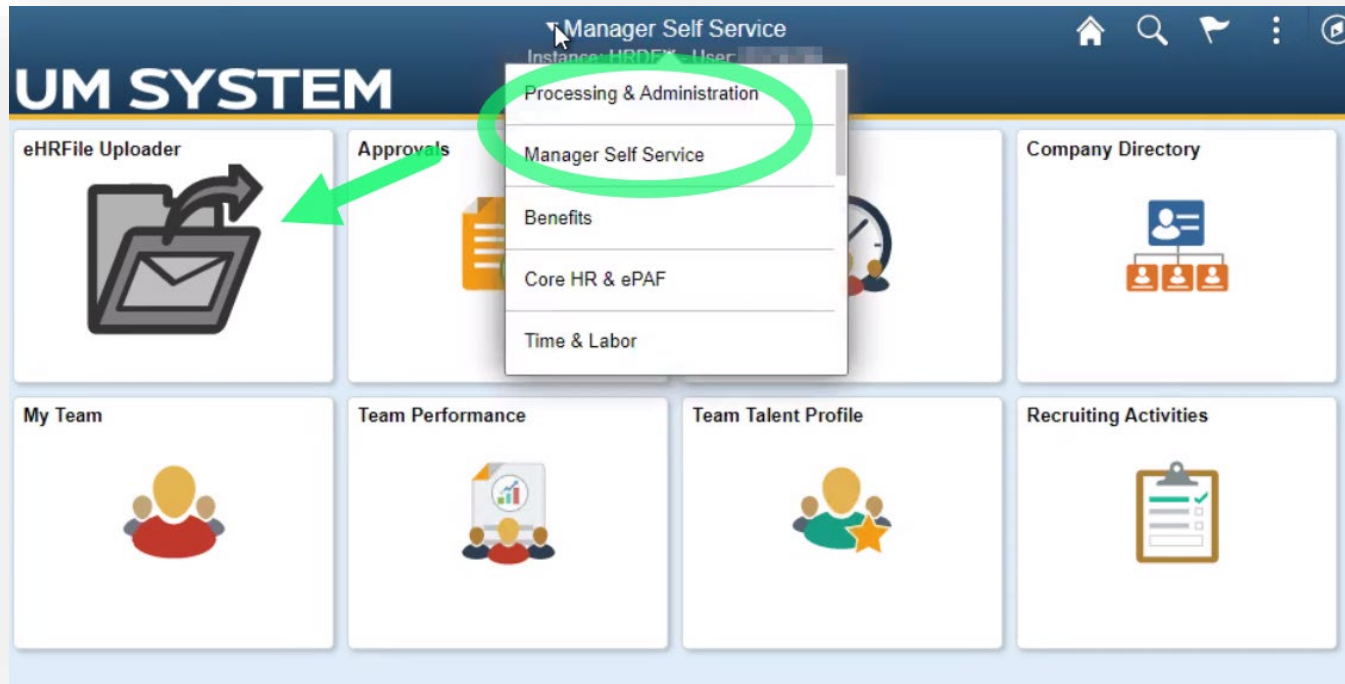
- a. A message appears, confirming the action you selected in the previous step.
- b. The **Transaction / Signature Log** displays the most recent transactions.
- c. If the Execute transaction isn't yet displayed, click the **Refresh** button. This action indicates that the document has been submitted to Perceptive Content.

Resubmit a recycled document

The following procedure demonstrates how an initiator resubmits a document that has been recycled by an approver.

1. If you are an initiator and receive an email notification that a document has been recycled by an approver, log into hrprd.umsystem.edu.

From either the **Manager Self Service** or **Processing & Administration** homepage, click the **eHRFile Uploader** tile.



2. The eHRFile page opens.
 - a. In the **eHRFile Uploader** menu on the left side of the page, select the **Update an eHRFile Secure Document** sub-menu.
 - b. Enter search criteria (e.g., the Form ID listed in the email notification) into the appropriate field(s) or select EHRFILE in the **Form Type** field.

Entering information in more than one search field will help filter the results, making it easier to locate a specific record.

NOTE: When searching the **Name** field, it must be entered as mixed case (*Last name,First name*, e.g. Mouse,Mickey) with NO SPACE after the comma.

- c. Click the **Search** button.
(Note that clicking the **Search** button without completing any search fields will return all results.)

The screenshot displays the eHRFile Uploader interface. On the left, a navigation menu is visible with the following items: eHRFile Uploader (expanded), Add an eHRFile Secure Document, Evaluate an eHRFile Secure Doc, Update an eHRFile Secure Doc (highlighted with a green circle 'a'), and eHRFile Viewer. The main content area features a search form with the following fields and options:

- Search by: Form ID (dropdown: Begins With, text input field with a green circle 'b' and a mouse cursor)
- Form Type (dropdown: Begins With)
- Form Status (dropdown: is Equal To)
- Department (dropdown: is Equal To)
- Empl ID (dropdown: Begins With)
- Empl Record (dropdown: is Equal To)
- Business Unit (dropdown: Begins With)
- Name (dropdown: Begins With)

At the bottom of the search form, there are two buttons: Search (highlighted with a green circle 'c') and Clear.

3. Click the appropriate record from the results that appear below the search fields. (Note that if you searched the Form ID, the appropriate record opens directly.)
4. The **Update eHRFile** page for the selected record opens.
 - a. Perform whatever edits the approver requested (e.g., change the document type in the Description column).
 - b. If you decide the record should not be attached to the employee’s personnel record, you can click the **Withdraw** button to end the submission process.
 - c. When finished making changes, click the **Resubmit** button.

	Form ID	Form Type	Form Status	Department	Empl ID	Empl Record	Business Unit	Name
1	3031530	EHRFILE	Pending	AHRISDPT	[redacted]	0	(blank)	[redacted]
2	3031531	EHRFILE	Pending	CBIOENGR	[redacted]	0	(blank)	[redacted]
3	3031661	EHRFILE	Recycled	AAITSERV	[redacted]	1	UMSYS	[redacted]
4	3031662	EHRFILE	Pending	AAITSERV	[redacted]	1	UMSYS	[redacted]
5	3031663	EHRFILE	Pending	AAITSERV	[redacted]	1	UMSYS	[redacted]

UM SYSTEM

Update eHRFile : eHRFile Secure Document Upload

Employee Information

Empl ID [redacted]

Name [redacted]

Empl Record 0

File Attachments

Status	Action	Description	Instructions
1 <input checked="" type="checkbox"/>	View	Hiring notes, reference	Drawer- X HR EMPLOYMENT FILE (CONFIDENTIAL) Examples- Job posting/requisition, applicant interview notes, reference checks, app

[Add](#)

Comments

[Search](#) [Withdraw](#) [Resubmit](#)

- 5. The document is routed back into the approval queue and will be re-evaluated by an approver.

The screenshot displays the 'Update eHRFile : Results' page. A light blue banner contains the message: 'You have successfully resubmitted your eForm. The eForm has been routed to the next approval step. multiple approvers.' Below this is a 'View Approval Route' button. Underneath is a section titled 'Transaction / Signature Log' containing a table with the following data:

	Current Date Time	Step Title	User ID	Description	Form Action
1	03/02/2021 2:27:00PM	Initiated	BOOKSH	Books,Heather E	Submit
2	05/07/2021 11:47:25AM	Resubmitted	BOOKSH	Books,Heather E	Resubmit

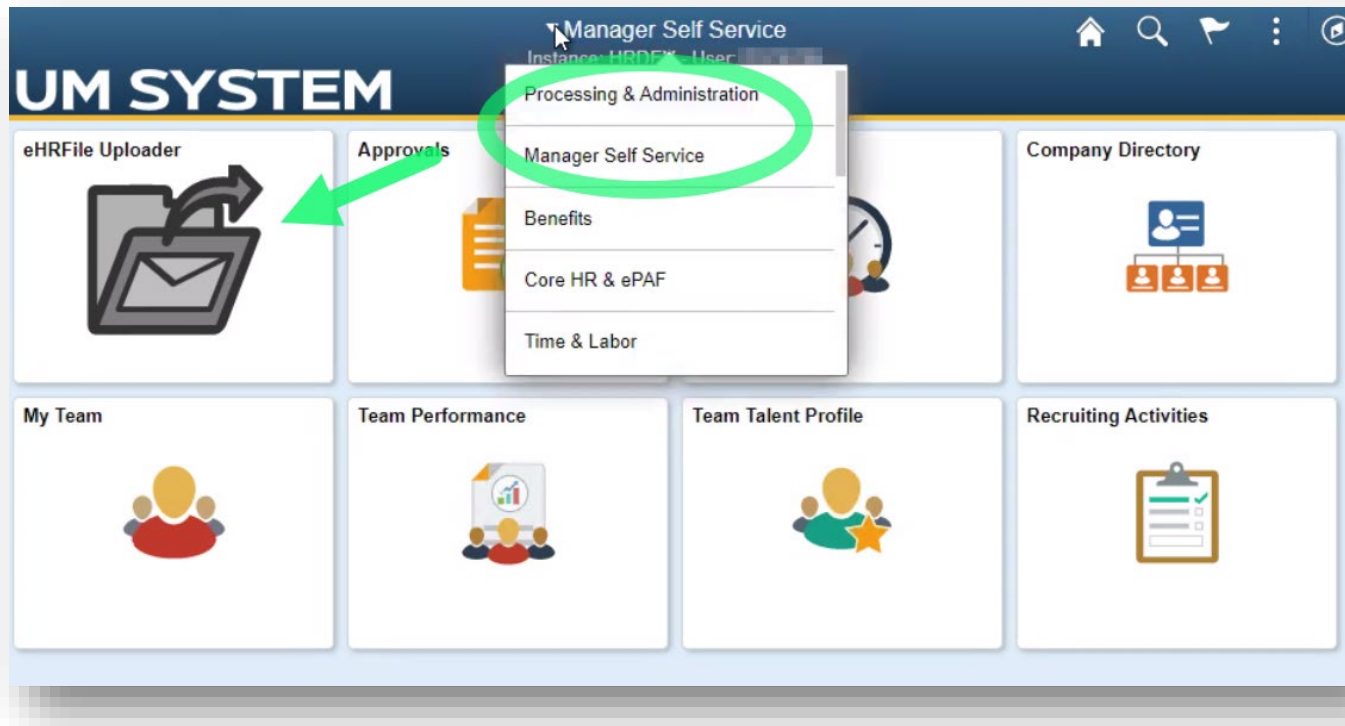
End of procedure.

eHRFile Viewer

The eHRFile Viewer allows submitters to view any uploaded file that is labeled non-confidential.

1. Log into hrprd.umsystem.edu.

From either the **Manager Self Service** or **Processing & Administration** homepage, click the **eHRFile Uploader** tile.



2. The **eHRFile Uploader** page opens.

- a. In the **eHRFile Viewer** menu on the left side of the page, select the **eHRFile Viewer** sub-menu.
- b. Enter search criteria.

NOTE: When searching the **Name** field, it must be entered as mixed case (*Last name,First name*, e.g. Mouse,Mickey) with NO SPACE after the comma.

- c. Click the **Search** button.
- d. Search results appear below the search criteria section. Click the row of the records you wish to view.

UM SYSTEM

eHRFile Uploader

eHRFile Viewer

eHRFile Viewer

Search Criteria

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All

Empl ID	Empl Record	Name	First Name	Last Name
	0			
	1			

3. The query page for the selected record appears.

Empl ID 07118207

Name Books, Heather E

Company UM Department AHRISDPT

[Query Perceptive Content](#)

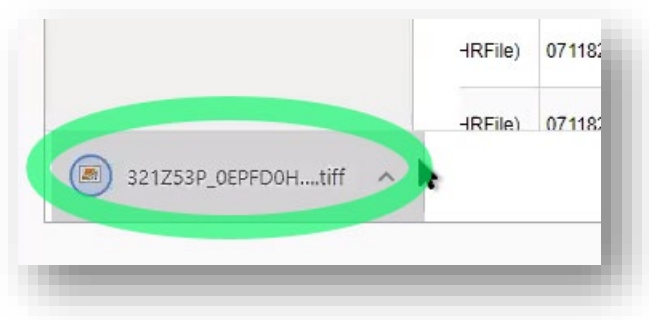
By clicking Query Perceptive Content, I take responsibility for protecting University files, including viewing files only from a University issued device, deleting the files from the Download folder after I no longer need access to them, and complying with [CRR 180.060 Personnel Files](#) and [CRR 110.005 Acceptable Use Policy](#).

	Download	Type	Pages	Date	Field 4	Field 3	Field 2	Field 1	Drawer
1	Download	Discipline and perf correction X HR	2			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)
2	Download	Conflict of interest X HR	2			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)
3	Download	Cont educ, prof dev, training X HR	2			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)
4	Download	Awards and perf recognition X HR	6			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)
5	Download	Justification for pay change X HR	2			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)
6	Download	Perf evaluations and appraisals X HR	2			UMSYS	Books, Heather E	07118207	X HR EMPLOYMENT FILE (eHRFile)

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

- Read the policy about viewing personnel files.
- Click the **Query Perceptive Content** button.
- Records will display in a table under the Query button.
- Select **View All** to list all records or use the Previous and Back buttons to move through the list.
- Click the **Download** button in the appropriate document's row.

- The document downloads as a .TIFF file. Most browsers display downloads in a bar at the bottom of the window, where you can click to open it when the download is complete.



There are various reasons you might not see the file appear when it downloads. For instance, some browsers are set to automatically download files into your Downloads folder, and you can find the downloaded files using File Explorer. Another common reason is that the browser is set to block pop-up windows. You can update download settings through the browser's Settings page.

- The file will open in your default picture viewer.

End of procedure.

End of reference guide.

