UW UNIVERSITY OF WISCONSIN SYSTEM

PERSONNEL FILE TRANSFER/RECEIVE
SHAREPOINT SITE INSTRUCTIONS

Questions, concerns or help, contact
Beth Miller
HR Assistant
UW System Human Resources
bmiller@uwsa.edu
608-263.4375

NOTE: Prior to uploading the file, please use the following naming convention:
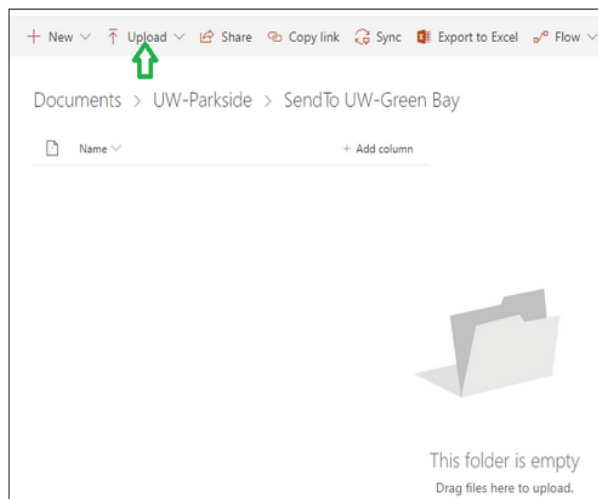
EMPID Last Name, First Name (e.g., 00000000 Miller, Beth)

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Sending files to another institution

1. Convert personnel file into one or more PDF file(s)
2. Log into the Personnel File Transfer SiteOpen your institution's folder
3. Open the SendTo folder for the instition that should receive the files
4. Copy PDF file(s) up to the site - either by dragging and dropping or using the "Upload" button on the screen
5. A process that runs on a regular schedule will move the file from your "SendTo" folder into the other institution's folder. This process could take up to 5 minutes
6. When the file disappears from the "SendTo" folder, you have successfully transferred

+ New ∨ ↑ Upload ∨ ⇡ Share ⚬ Copy link ⟳ Sync ⚏ Export to Excel ⌨ Flow ∨

Documents > UW-Parkside > SendTo UW-Green Bay

☐ Name ∨   + Add column

This folder is empty
Drag files here to upload.

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Receiving files from another institution

1. Files sent to you will appear in your institution's folder, either above or below all of the "SendTo" folders
2. Copy files to the appropriate location according to your institution's file storage procedure
3. Confirm that copy was successful, then delete file from the Personnel File Transfer Site
4. To learn how to get email alerts when another institution sends you a file, read Alerts

Alerts

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Create Email Alerts for Your Folder

To receive an email alert when a new file arrives in your institution's folder:

1. Open the site and open your institution's folder
2. Select "documents" on the left menu bar
3. Click the elipses on the right side of the menu bar, and select Alert Me
4. Follow the prompts to set your preferred options
5. You can come back and change these options at any time

NOTE: at this time, there is an unfortunate bug which generates 2 emails on each automated file move if you sign up for alerts. This is a problem with SharePoint. Please disregard the extra message.