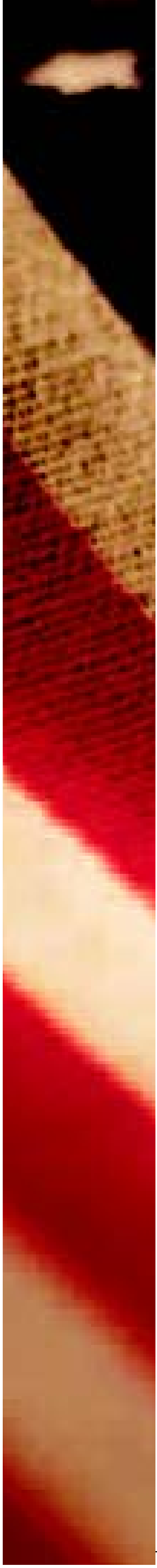

EHRI

Enterprise Human Resource Integration

Electronic Official Personnel Folder (eOPF) User Guide for Human Resources (HR) Staff and eOPF Administrators

FROM:
The e-Gov Program Office
U.S. Office of Personnel Management
1900 E Street
Washington, DC

<January 2006>

eOPF Rev 3.1.0

"Implementation of e-Government is important in making government more responsive and cost effective"

President George W. Bush
July 10, 2004

Electronic Official Personnel Folder User Guide

Version 3.1.0.x, January 2006

Contents

Part I - Basic User Functions

The following chapters cover Basic User Functions in the eOPF system and relate to all personnel accessing the eOPF system.

Chapter 1: Introduction to eOPF

eOPF Overview

Electronic Official Personnel Folder (eOPF) is a system developed as a management solution to handle official personnel files and to simplify your access to your own Official Personnel Folder (OPF). The OPF contains human resource (HR) records and documents related to Federal civilian employees. An OPF is created when an employee begins Federal service, and is maintained throughout the employee's career in accordance with the United States Office of Personnel Management (OPM) regulations.

The eOPF solution provides electronic, Web-enabled access for all employees, supervisors, and HR staff members to view eOPF documents. All employees will be able to view their own OPF through this eOPF solution.

Note:

The eOPF administrator functionality allows administrators full access to the system. eOPF HR functionality allows HR staff members to view their own documents, documents of employees who report directly to them, and documents of employees within the organizations they service. The eOPF Supervisor functionality allows supervisors to view their own eOPF documents and some of the documents of employees who report directly to them. And, finally, general eOPF employee user functionality allows employees to view/print their own eOPF documents.

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eOPF includes security measures to ensure the integrity of the system. For example, users are able to view their own eOPF documents, but not modify the documents. Additionally, all activity performed in the eOPF solution is logged and can be accessed through various reports. The eOPF provides an audit trail capability, including a mandatory log that documents when and why an authorized user has reviewed an eOPF.

Note:

The eOPF solution is not a vehicle through which documents can be modified. (Information found on SF-50/52s, benefits documents, etc. can be modified/corrected through agency HR systems, Employee Benefits Information Systems, etc.).

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eOPF has a variety of functions that are accessible depending upon the role of the logged in user. The eOPF system provides four types of

functionality: eOPF administrator functionality, eOPF HR functionality, eOPF Supervisor functionality, and general eOPF employee user functionality. This User Guide covers topics for HR users and eOPF administrators, who may have access to scanning, viewing, annotating, paper clipping, and printing. This Guide also covers special functions that pertain to the eOPF administrators. This Guide covers topics for installed versions of eOPF. If you do not have access to the Web or the eOPF solution, please contact an eOPF administrator to assist you with setup.

IMPORTANT!

This User Guide includes representative screens from the eOPF; however, your system may be slightly different depending upon your agency's requirements. In addition, some functionality, such as career briefs and position descriptions, is optional and may or may not be configured for your system.

User Types and Groups

Throughout this and other eOPF documentation, references are made to User Types and User Groups. The following paragraphs describe the distinction between the two.

User Types

The type of user (Employee, Supervisor, Super User, and Systems Administrator) determines the documents to which a user is given access when using eOPF.

- Employee users can view and print their own eOPF documents only.

- Supervisor users can access their own eOPF and can view and print selected documents for those employees they supervise. The determination of who is a supervisor is completed by a nightly employee data feed from the agency. That nightly query also obtains and stores in eOPF the organizational definitions for all employees and supervisors. These organizational definitions determine the individual eOPF(s) that a supervisor has access to view. Supervisors do not have access to view the eOPFs of other supervisors at the same level of organization.

- Super users have access to view eOPFs for an additional selection of employees for whom they would not have access by virtue of the supervisor definition. The most common use of this designation is for HR staff members who service or otherwise require and are authorized access to eOPFs for employees who are not in the same organization. For example, an HR staff member, working at a federal agency (with a Personnel Office ID (PO ID) of 'xx', an Organization Code of 'yy', and an Activity Code of 'zz', may have the responsibility of providing service to employees within another Organization 'aa'. If designated simply as a Supervisor, the HR staff member would have access only to eOPFs under the hierarchy of PO ID:xx, Organization Code:yy, and Activity Code:zz. However, if this user is designated as a super user, the user can be granted access to eOPFs in the organization with Organization code 'aa'. The super user designation and the additional organizations, for which the user is provided access, are defined by the functional administrator through use of the ***Administrative Tools*** described in this Guide.

User Groups

User groups are defined to determine the functionality for which a given user is granted access. Functionality refers to features and capabilities that are provided within eOPF through menus or buttons. These features are granted (or denied) to a user by virtue of the group or groups to which the user belongs. Through the use of the eOPF administration function, the individual agency eOPF administrator pre-sets different group names. For each group, the eOPF administrator assigns specific functions to which that group has (or does not) have access. Then, when a user is flagged as a member of a group (or groups), that user has access to the functionality that is allowed for that group (or groups).

When eOPF determines that an employee is active, that employee is automatically inserted as a member of the eOPF users group. This group has access to the View and Print functionality. For additional functionality, such as scanning, annotating documents, modifying indexes, etc., the user must be added to a group that has been given rights to those functions.

Note:

The eOPF administrator functionality allows administrators full access to the system. eOPF HR functionality allows HR staff members to view their own documents, documents of employees that report directly to them and employees within the group they service. The eOPF supervisor functionality allows supervisors to view their own eOPF documents and the documents of employees that report directly to them. The eOPF investigator role allows for the definition of a user that performs background checks. This user has read/print privileges on eOPF they are granted access to. Finally, general eOPF employee user functionality allows employees to view/print their own eOPF documents.

Icon Conventions

The icons shown in the following table are used in eOPF and throughout this User Guide.

Icon	Function	Description
View Career Brief	Career Brief	Click this icon to view an eOPF career brief. A career brief is a summary of an employee's career activities.
View PDQ	PDQ	Click this icon to view the Position Description. This feature is not available to all deployments.
Clip Folder	Clip Folder	Click this icon to view clipped folder(s). A clip folder is an a group of documents within a folder.
Emergency Data	Emergency Data	Click this icon to view the ***Emergency Contact Information*** page from which you can view and update your emergency information.
View	View Doc	Click this icon to view a document.
Modify	Modify Doc	Click this icon to modify a scanned document. **Note:** The only modification of the document that can be done is the addition or deletion of pages. Contents of the data cannot be modified in eOPF.
Delete	Delete Doc	Click this icon to delete a document.
Annotate	Annotate Doc	Click this icon to annotate a document.
Modify Index	Modify Doc Index	Click this icon to modify the document index.
Add to Clip	Add Clip	Click this icon to add documents to a paper clip.
Add Doc	Add Doc	Click this icon to add documents to an eOPF folder.

Chapter 2: Browser and Viewer Requirements

To access and utilize the eOPF solution, two basic "off-the-shelf" software requirements for the user's PC are a Web browser application and Adobe Acrobat Reader.

Browsers

Commercially available web browsers can be utilized to access the eOPF solution. For best results, it is recommended that the latest version of Microsoft Internet Explorer be used.

Downloading and Configuring the Viewer (Adobe Reader)

The eOPF solution stores documents as Portable Document Format (PDF) files, which can be viewed and printed using Adobe Reader. If you do not have Adobe Reader installed on your computer, it is available as a free download on the Internet.

Note:

The Adobe Reader "options" should be set to "not" view inside the browser. This can be accessed by selecting Edit →Preferences →Internet in Adobe Reader v6x version.

Chapter 3: Getting Started with eOPF

Before you can perform any activity within the eOPF solution, you need to log on. Logging on requires that you have a valid user name and password. Your user name and password are created either at system deployment or when you initially become an employee. If you do not already have a user name and password for eOPF, please contact an eOPF administrator to obtain one. If you have a user name, but do not recall your password, a ***'Forgot your password?'*** link is available on the ***eOPF Web Logon*** page. When selected, this generates a letter sent by U.S. mail or email, which assigns a new random password to you.

Note:

After three (3) consecutive failed attempts to log on to eOPF, you will be locked out of the system as a security precaution. The number of failed attempts is configurable by the administrator.

In order to ensure the security of the eOPF solution, remember to safeguard your user name and password. Some guidelines for password security are as follows:

- Do not share your password with anyone, not even an eOPF administrator.
- Do not write your password down.
- Do not allow anyone to use eOPF with your eOPF ID/password combination. All system actions are logged by user name.

After you log on to eOPF, you can change your password. Additional eOPF features that you can use include changing your email address, viewing and updating emergency data, and accessing eOPF online help.

Logging on to eOPF

You must log on to the eOPF each time you want to access the system. After you log on to eOPF, you can change your password.

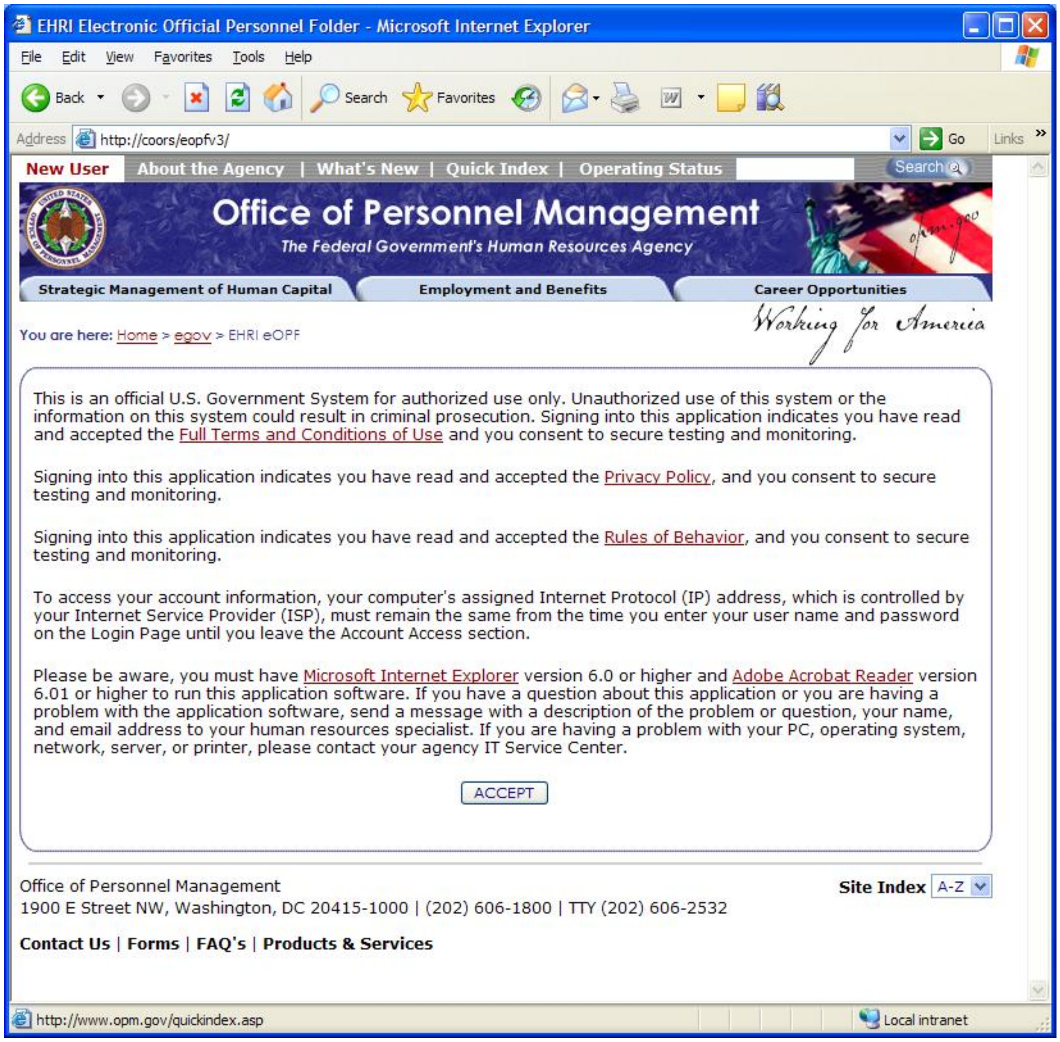
To Log on to eOPF:

1. **Launch your Internet browser.**

2. **Maximize the browser to utilize the entire page.**

3. **Type the designated Address for eOPF in the Uniform Resource Locator (URL) field of the Web browser.**
   For example, https://hostsite/eOPF. You can obtain the URL address from your eOPF administrator. The ***eOPF User Agreement*** page appears.

The following figure displays the ***eOPF User Agreement*** page.



4. **Click the** 

Accept **button, after reading the User Agreement statement.**
   The ***eOPF Web Logon*** page appears.

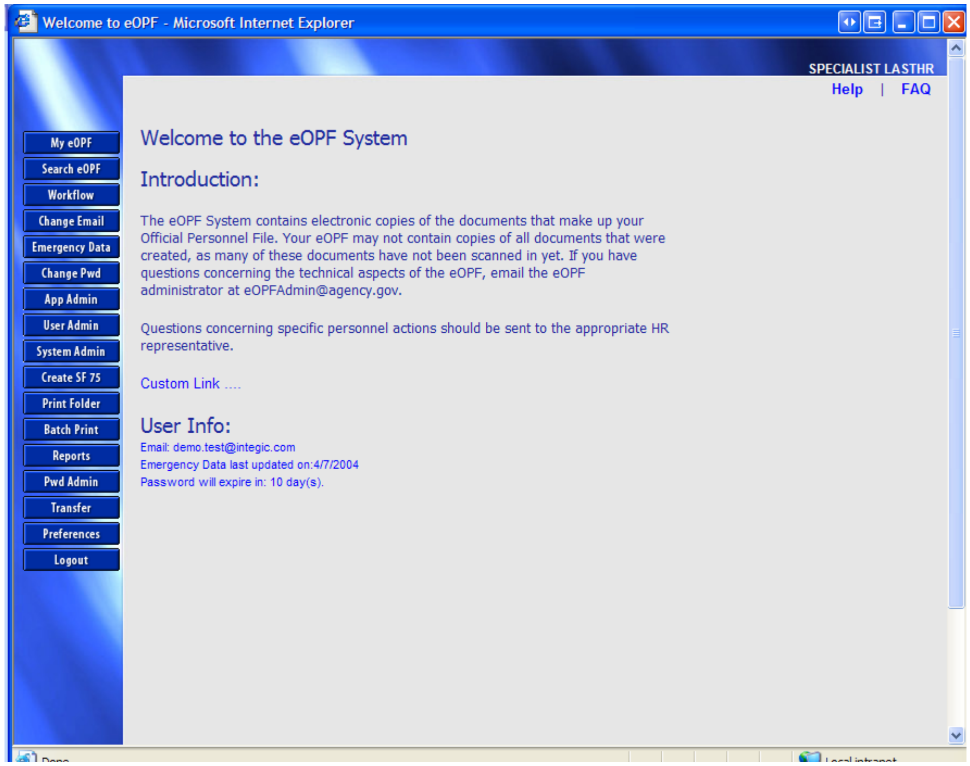
This figure displays the ***eOPF Web Logon*** page.

5. Type your eOPF ID in the *eOPF ID* field.

6. Type your Password in the *Password* field.

7. Click the  ***Submit* button.**
The ***eOPF Welcome*** page appears.

The following figure displays the ***eOPF Welcome*** page.



New User – Request a Password

To Request a New User Password:

1. From the eOPF Web Login page, click the New User-Request your Password link.
The **New User – *Password Request*** page appears.

The following figure displays the ***New User – Password Request*** page.

2. **Type your eOPF Logon ID in the *eOPF ID* field.**

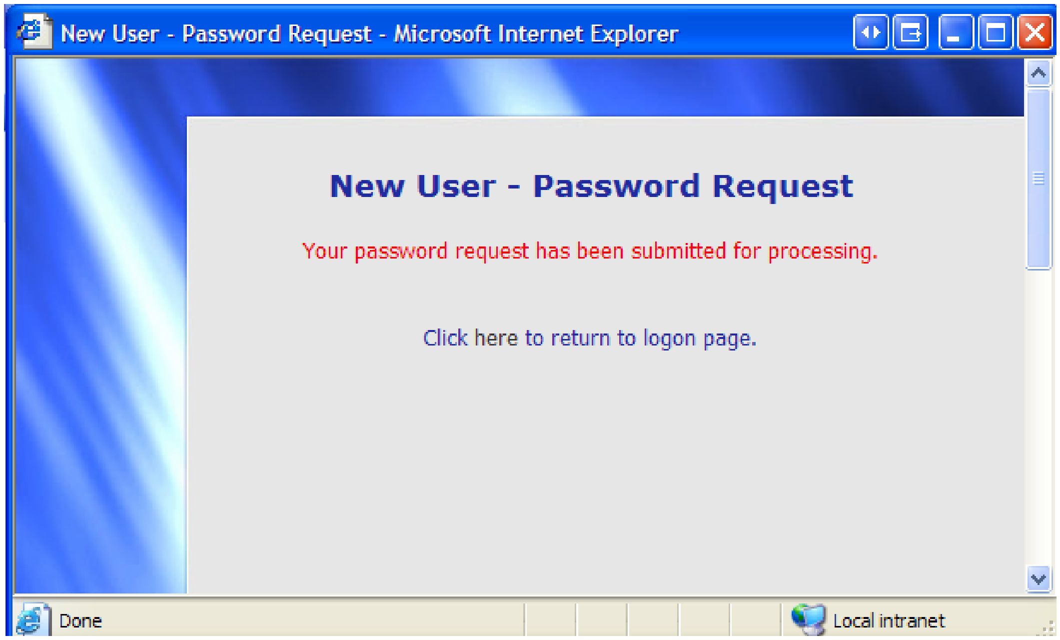
   - **Type your eOPF email address in the *Email Address of record in eOPF* field.**

   - **Type your Home Zip Code in the Home *Zip Code of record in eOPF* field.**

   - **Enter problem and contact information in the Message text box. This is limited to 255 characters.**

3. **Click the** 

 ***Submit* button.**
   The ***Reset Password Request*** page reappears displaying the following message “Your password request has been submitted for processing.”



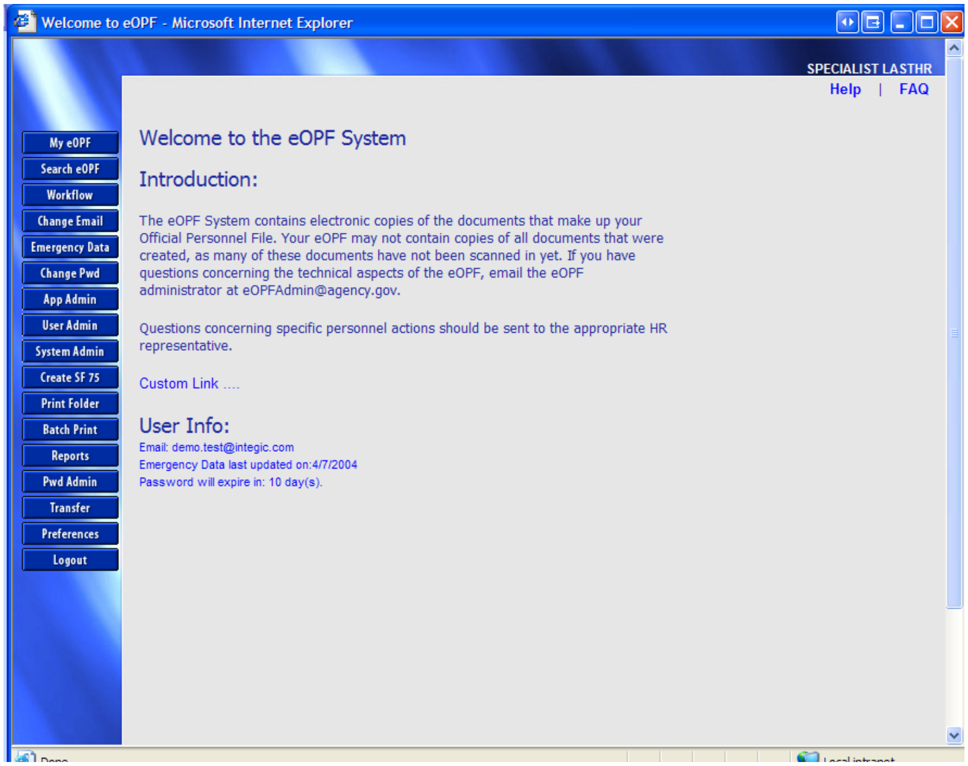
Note:
Once you request a New User Password, depending on the validation of the information you supplied you will either be emailed a new password directly or the eOPF administrator generates a letter containing your new password. Depending on your organizations policy this letter will be sent by post office or via email.

Note:
You can exit the ***New User – Password Request*** page by clicking the 

Cancel button.

Using the Main Menu Buttons

The eOPF main menu buttons display in the left hand margin of your eOPF pages. The following figure displays the *eOPF Welcome* page the main menu buttons on the left side of screen.



Note:
The main menu options may appear slightly different from the example above. The main menu buttons vary depending on the eOPF group functional access that has been granted to you by the eOPF administrator.

The following table describes the eOPF main menu buttons.

Menu Option	Description
My eOPF	Displays all of the contents of your eOPF. You can select individual documents for viewing or printing. See *Viewing Your Entire eOPF* for details.
Search eOPF	Displays the ***Search*** page from which you can search for eOPFs. You can view or print documents using this option. See *Searching for an eOPF* for more details.
Work Flow	Displays the Work List page from which you can access the automated workflow capability This includes the capability to route documents between HR staff members for review prior to storage. See *Workflow* for more details.
Change Email	Displays the ***Email Address*** page from which you can enter your email address. See *Changing Your Email Address* for more details.

Menu Option	Description
Emergency Data	Displays the ***Emergency Contact Information*** page from which you can view and update your emergency information. See *Viewing and Updating Emergency Data* for more details.
Change Pwd	Displays the ***Change Password*** page from which you can change your password at any time. See *Managing Your eOPF Password* for more details.
App Admin	Provides administrative tools for application specific activities such as forms, form types, disclosure reasons, folder sides, etc.
User Admin	Provides administrative tools for user specific activities such as user manager, generate password, regenerate password, and security access.
System Admin	Provides administrative tools for system settings,splah page, email templates, volume management, and ad-hoc SQL.
Create SF 75	Displays the ***Create SF 75*** page from which you can complete an SF 75 for employee transfer. See *Creating an SF 75* for more details.
Print Folder	Displays the ***Print Folder*** page from which you can print an employee's entire eOPF. See ***Printing an Entire eOPF Folder*** for more information.
Batch Print	Allows you to print multiple folders simultaneously. See *Printing Batch Folders* for more details.
Reports	Allows you to view, print, and export logs and reports. See ***Working with Reports*** for more details.
Pwd Admin	Allows you to change the password of a user.
Transfer	Access to the Transfer module that allows you to move an OPF to a gaining agency or to accept and OPF from a losing agency.
Preferences	Displays the ***Preference Web*** page where user can set general setting such as default forms list shown on search page and the number of rows to return in a result set. The workflow tab is only enabled if you have workflow access.
Logout	Logs you out of the eOPF. See *Logging out of eOPF* for more details.

Managing Your eOPF Password

Password Policies

Passwords are used in conjunction with a eOPF ID to gain access to eOPF. eOPF passwords must adhere to the requirements defined by the administrator. The following password restrictions can be enabled by the administrator:

- Minimum number of characters
- Contain at least one uppercase letter (i.e., ‘A’)
- Contain at least one lowercase letter (i.e., ‘a’)
- Contain at least one number (i.e., ‘1’)
- Contain at least one special character (i.e., !, @, #, $, %, ^, &, *, (,), +, {, }, [,], ’, ;, ”, :, ?, >, <, ,, ., /)
- Password expiration period

For example, your eOPF passwords can be set to expire every 90 days. When your password expires, you will be forced to select a new one the next time you log in before proceeding with any other functions. The system may also be configured to require you to reset your password the first time you log into eOPF and after an administrator resets your password.

Note:

These password requirements may change since the eOPF administrator can configure the password requirement settings.

Manually Changing your Password

eOPF provides the ability for you to manually change your password, at any time, prior to the 90-day expiration date.

To Change Your Password:

1. **From the *eOPF Welcome* page, click the** 

Change Pwd button.
The ***Change Password*** page displays.

This figure displays the ***Change Password*** page.

2. Enter your current password in the *Old Password* field.

3. In the *New Password* field, enter your new password.

4. In the *Verify Password* field, enter your new password again.

5. Click the 

***Update* button.**

The ***Change Password*** page reappears displaying the following message: “Password updated successfully.”

Note:

Password settings are configurable by the site administrator. Typical settings force required password length and track password history. When changing passwords, there are a few guidelines to follow:

• Passwords cannot be reused for a number of iterations.

• Passwords must be complex (Minimum 8 characters, contain at least one upper-case letter, contain at least one lower-case letter, contain at least one number and contain at least one special character(!,#,$,^,*).

• Passwords must not contain identical, repetitive characters.

Resetting Your Password

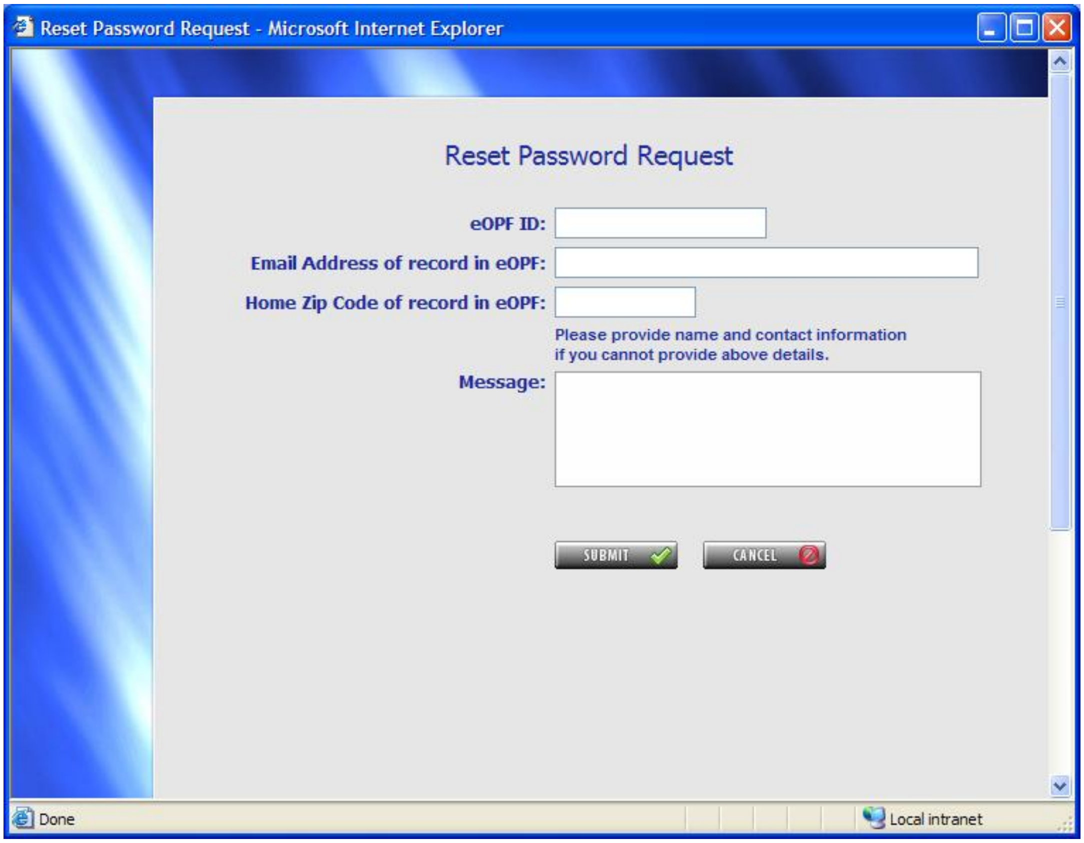
If you forget your password, eOPF has a facility to allow you to request that your password be reset. This link will bring you to an eOPF password reset request web page. This web page will prompt you for your eOPF ID, eOPF email address of record, the eOPF home zip code of record and a free text field to put in any contact information you chose. When you select the “Reset Password” button the entries you made will be compared against data in the eOPF employee information repository. If all three entered values match the stored values then eOPF will send a new password email to you. The email is sent to your email address of record in the eOPF repository. Your email address of record is shown on the eOPF Welcome Page after you log in successfully. Once logged into eOPF you can change this email address if required.

If the values you entered do not match the values held in eOPF repository an email is sent to the eOPF support staff who will contact you to help resolve any login issues.

To Request a Password Reset:

1. **From the *eOPF Web Login* page, click the ‘*Forgot your password?’* link.**
   The ***Reset Password Request*** page appears.

The following figure displays the ***Reset Password Request*** page.



2. Type your eOPF Logon ID in the *eOPF ID* field.

- **Type your eOPF email address in the *Email Address of record in eOPF* field.**
- **Type your Home Zip Code in the Home *Zip Code of record in eOPF* field.**
- **Enter problem and contact information in the Message text box. This is limited to 255 characters.**

3. Click the 

***Submit* button.**

The ***Reset Password Request*** page reappears displaying the following message "Your password request has been submitted for processing. You will either receive an email with your new password or be contacted by support staff." After submitting a password request do not continue to attempt to logon to the application as you will lock out your account.

Note:
Once you request a password reset, depending on the validation of the information you supplied you will either be emailed a new password directly or the eOPF administrator generates a letter containing your new password. Depending on your organizations policy this letter will be sent by post office or via email.

Note:
You can exit the ***Reset Password Request*** page by clicking the 

Cancel button.

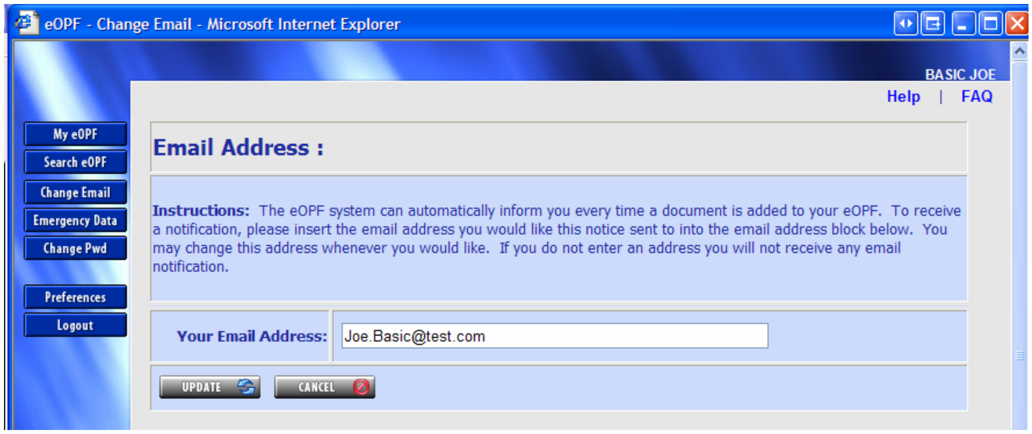
Changing Your Email Address

The eOPF solution notifies users when new eOPF documents are added via email; therefore, if your email address changes it is important that you update it in the system. eOPF allows all users to change their email address.

To Change Your Email Address:

1. **Click the *Change Email* button.**
   The ***Email Address*** page appears.

The following figure displays the ***Email Address*** page.

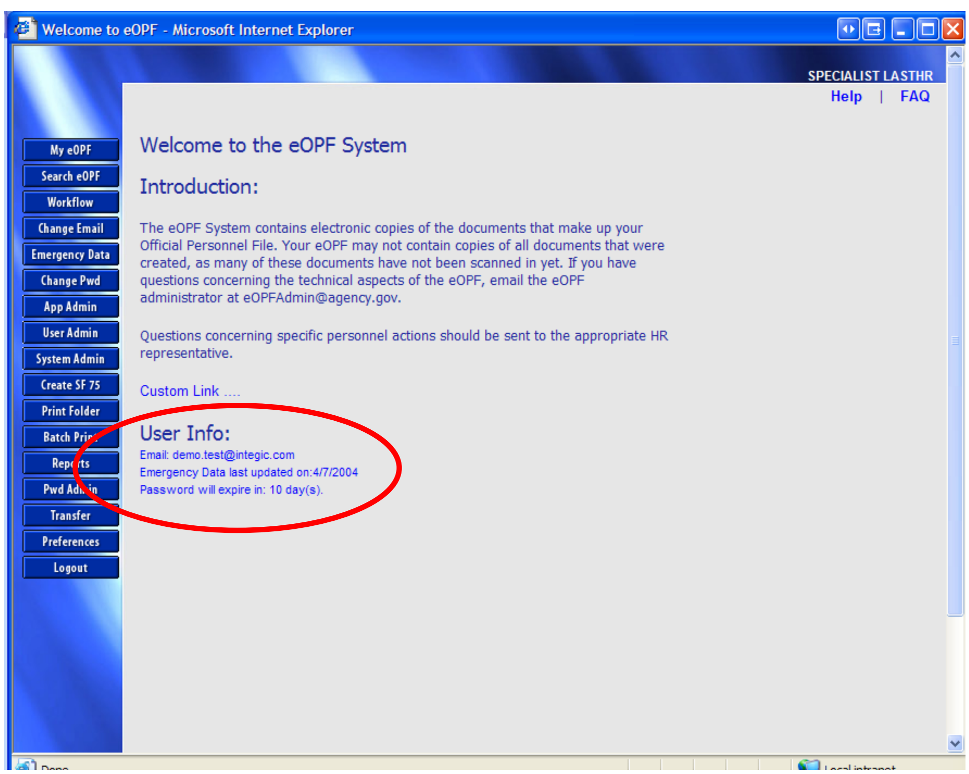


2. Type your email address in the *Your Email Address* field.

3. Click the  ***Update*** **button.**

The ***eOPF Welcome*** page appears with the updated email address displayed.

The following figure displays the ***eOPF Welcome*** page with an updated email address.



Note:

You can exit the ***Change Email*** page by clicking the 

Cancel button and return to the ***eOPF Welcome*** page.

Viewing and Updating Emergency Data

The eOPF allows you to enter emergency contact information. This information is available to your supervisor and/or HR personnel for emergency use only.

To View and Update Emergency Data:

1. **Click the *Emergency Data* button.**
   The ***Emergency Contact Information*** page appears.

The following figure displays the ***Emergency Contact Information*** page.

2. **Edit the desired fields and click the** 

***Apply* button.**

The ***Emergency Contact Information*** page reappears displaying the message "Emergency data updated successfully."

Note:

You can exit the ***Emegency Contact Information*** page by clicking the 

Cancel button and return to the ***eOPF Welcome*** page.

Changing Your Preferences

The eOPF application allows users to set specific preferences when using the application. There are two types of preferences: General and Workflow. Workflow is only accessible if you have workflow enabled for your account. If you do not have a workflow enabled account a message is displayed indicating you do not have access when you try to access the workflow preference tab.

The following figure displays the ***Workflow Preferences*** page with denial of access message.

From the General Preferences tab, a user can set the default forms list that is provided on the Search Page, the number of rows to display in a result set and which columns to display in the result set. The number of rows is relevant to HR Specialist and Administrators to control long lists within the administration pages of eOPF. The filter on the Forms list improves performance by reducing the size of the list transmitted to your web browser. If you select ‘All Forms’ your list will probably exceed three hundred forms.

To Change Your Preferences (General):

1. Click the 

Preferences **button on the eOPF main menu.**

The ***Preferences*** page appears with the General tab active.

The following figure displays the ***General Preferences*** page.

2. **Type your desired number of rows per page in the *Number of Rows per Page (Display)* field.**

3. **Select the Default Search Option (Forms) you desire. .**
   The choices are: Common Forms, All Forms, and Agency Forms. Common forms are defined by the agency as forms people typically search to see. All Forms produce a very large list of all possible forms including a mix of agency specific and federal forms. Agency Forms produces a list of forms that are owned by the particular agency you are a member of.

4. **Select which fields you'd like to see in the results display (folder level)**
   The choices are: The options are SSN, First Name, and Last Name

5. **Select which fields you'd like to see in the results display (document level)**
   The choices are: The options are Form Number, Form Description, Type Description, NOA Code 1, NOA Code 2, Side by Side, Create Date, Side, Exception Comment, and Print.

6. Check if you'd like to have folder/document display compatible with Section 508 standards.

When enabled, instead of drop-down actions for folders/documents, they will be displayed in cells that can be accessed by using the keyboard. Uncheck to re-enable the drop-down actions.

7. Click the 

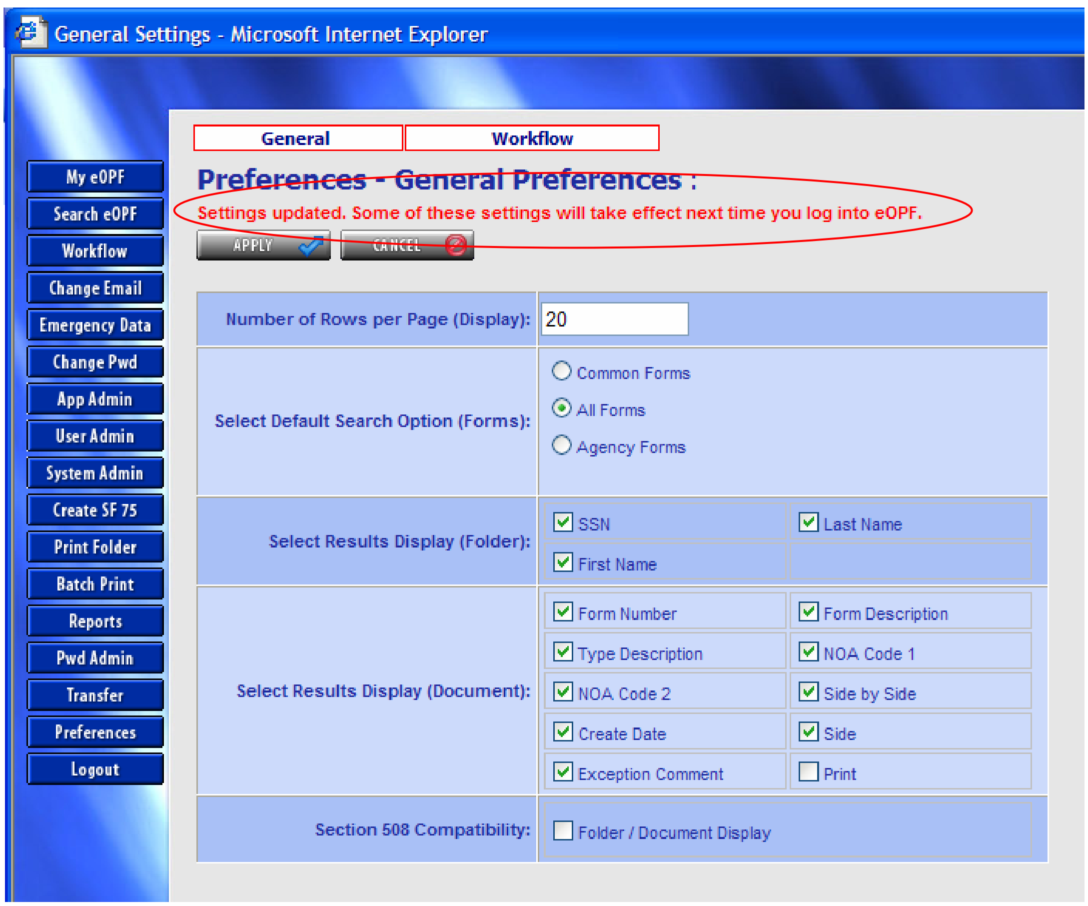
***Apply* button.**

The ***Preference*** page displays a message "User Preference settings updated."

Note:

To cancel and return to ***eOPF Welcome*** page, click the ***Cancel*** button.

The following figure displays the ***General Preferences*** page with a confirmation message.

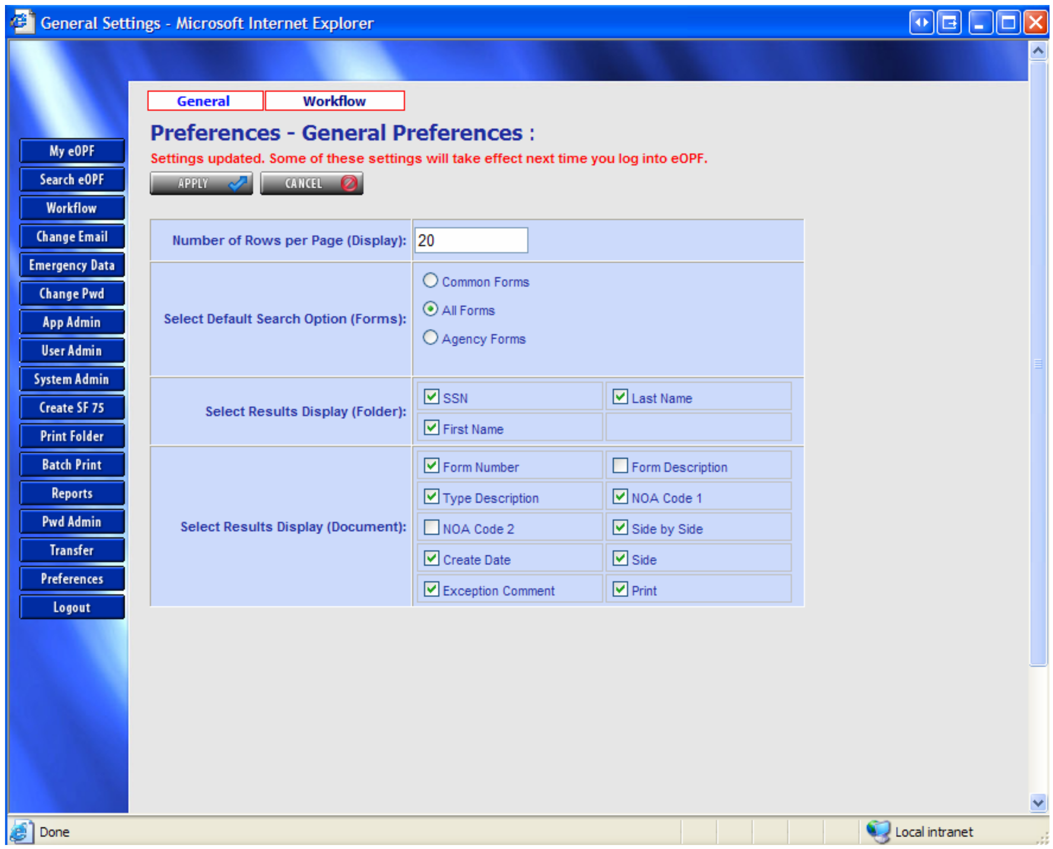


To Change Your Preferences (Workflow):

1. Click the  ***Preferences*** **button on the eOPF main menu.**

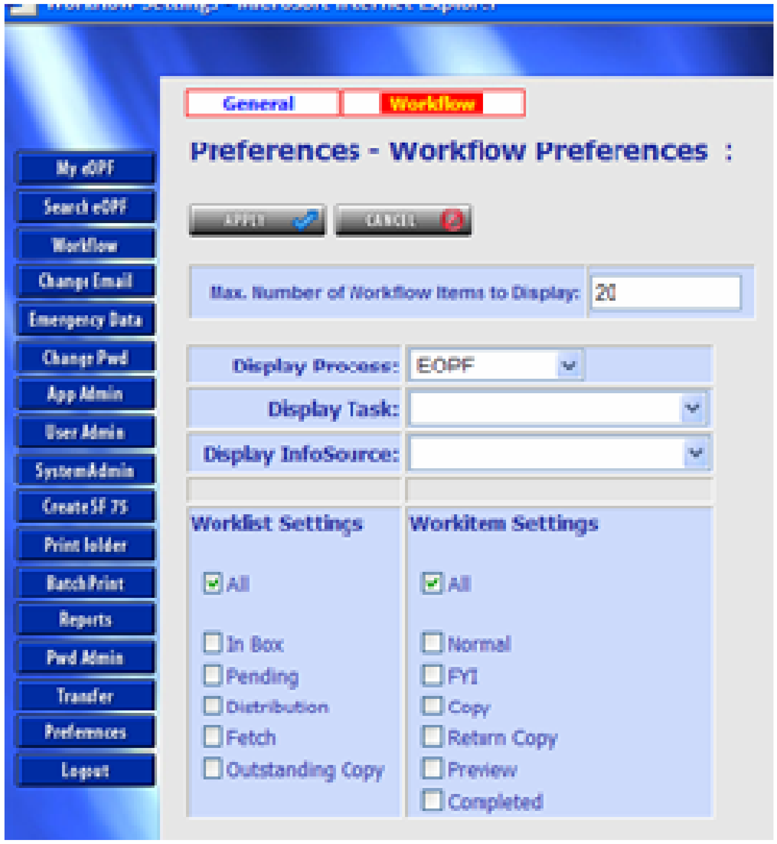
The *Preferences* page appears with the General tab active.

The following figure displays the ***General Preferences*** page.



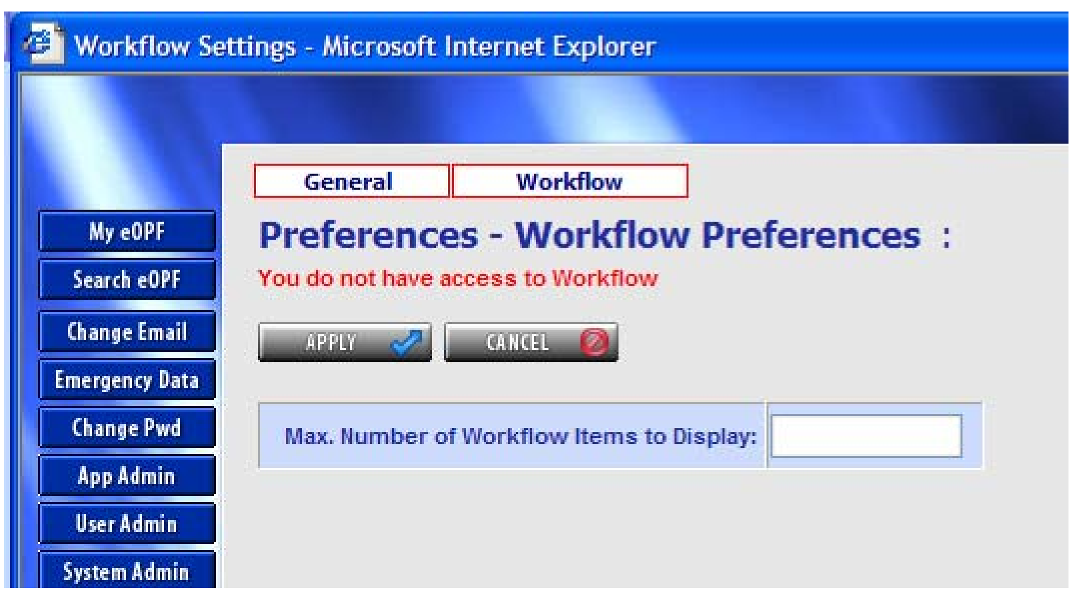
2. Click on the Workflow tab.

The following page is displayed for workflow preferences.



Note:

If you do not have workflow access the following page is displayed.

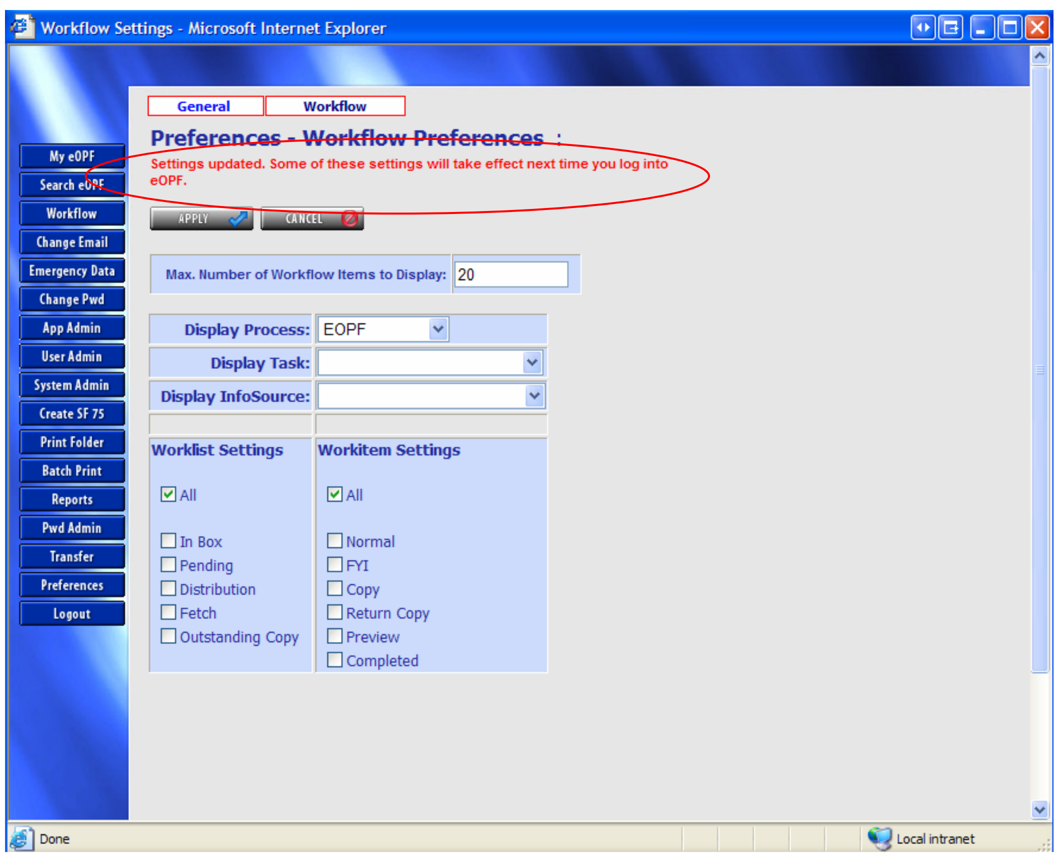


3. **Type your desired max number of workflow items per page to Display in the *Max. Number of Workflow Items to Display* field.**

4. **Select from the drop down lists to configure your preferences for work item list display.**
   See the chapter on workflow for detailed explanations regarding Display Process, Display Task, Display InfoSource and other Worklist and Workitem settings.

5. **Click the**  ***Apply* button.**
   The ***Preference*** page displays a message "User Preference settings updated."

The following figure displays the ***Preferences*** page Workflow Tab with a confirmation message.

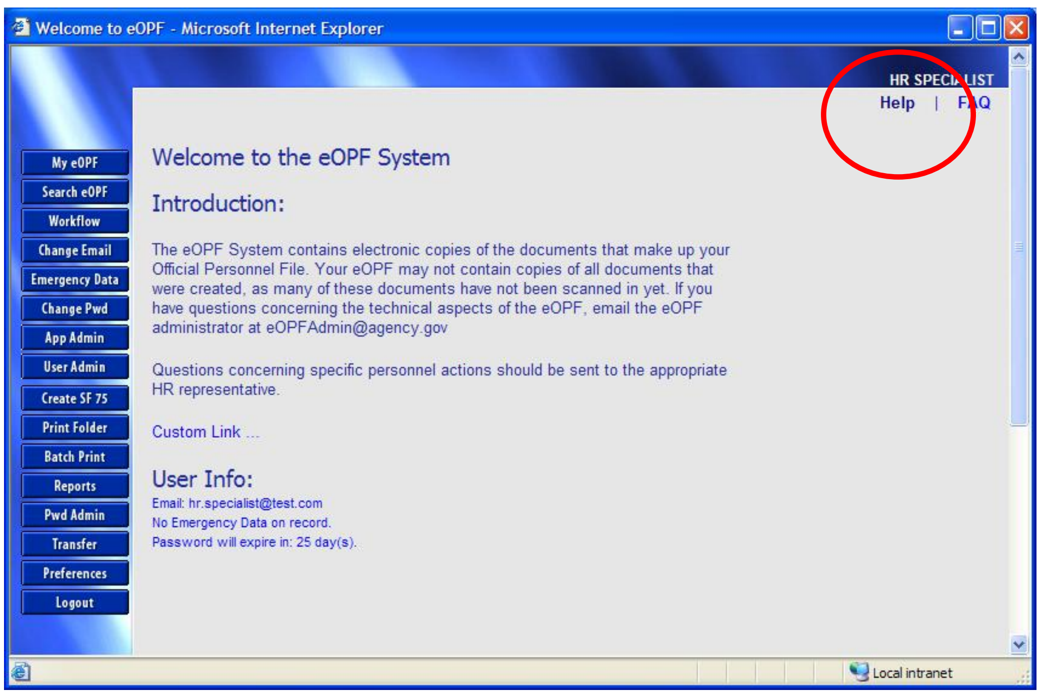


Note:
To cancel and return to ***eOPF Welcome*** page, click the ***Cancel*** button.

Accessing Online Help

You can access eOPF online help by clicking on the *Help* link at the top of an eOPF Web page. From the *Help* page, you can jump to topics of interest.

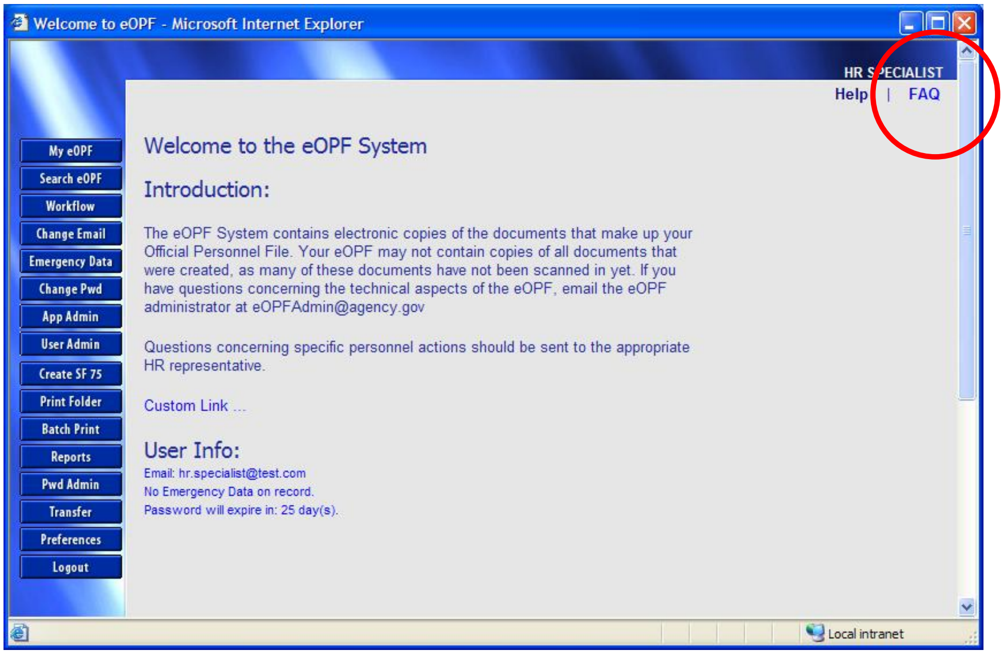
The following figure shows the ***eOPF Welcome*** page with the ***Help*** link circled.



Accessing Frequently Asked Questions

The eOPF provides access to a ***Frequently Asked Questions*** **(*FAQ*)** page. The *FAQ* page can be accessed by clicking on the *FAQ* link provided at the top of eOPF pages.

The following figure displays the ***eOPF Welcome*** page with the ***FAQ*** link circled.



Accessing the *FAQ* page allows access to current eOPF information. For example, the *FAQ* page may post information about:

- Definition of the eOPF solution
- Frequently asked questions and answers
- What's new
- Discuss technical issues
- How to contact eOPF support; and
- General information about eOPF solution access

Logging out of eOPF

In order to ensure the security of the eOPF solution, remember to log out of the system when you are finished.

Note:

You will be automatically logged out of the eOPF system after the system is idle for 15 minutes.   (This setting is configurable by the administrator.)

The following figure displays the ***eOPF Welcome*** page with the ***Logout*** button circled.

To Log out of eOPF:

1. Click the 

Logout **button.**

A log out confirmation page displays.

The following figure displays the log out confirmation page.

2. Click the 

OK **button to logout of eOPF and automatically close the browser window.**

-OR-

Click the 

***Cancel* button to return to eOPF and continue work.**

Part II - HR Functions

The following chapters cover HR Functions in the eOPF solution and relate to all HR personnel accessing the eOPF solution.

Chapter 4: Viewing Documents

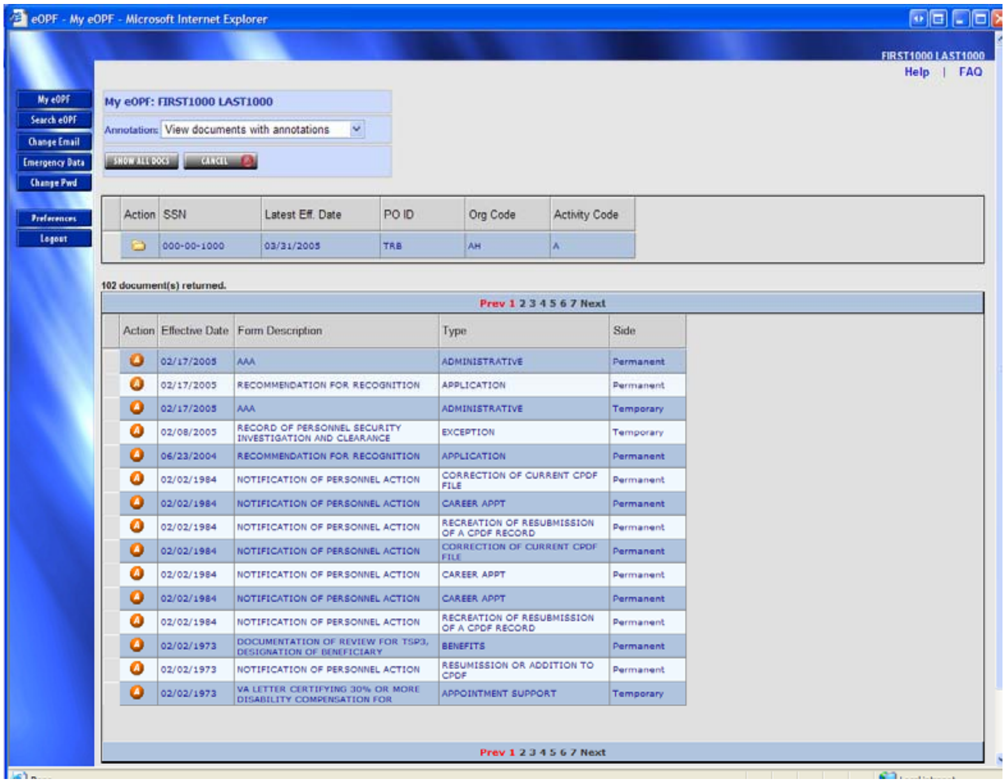
eOPF manages personnel documents, which are organized by folder. Folders are created for every employee. Individual documents and forms are filed in chronological order in the individual eOPF folders. Each eOPF folder contains all the documents that are appropriately retained in an OPF in accordance with OPM guidelines in the same manner that the traditional paper-based folders hold the paper personnel documents. The electronic folders that eOPF manages, are organized, and stored in accordance with OPM guidelines.

Once logged on to the eOPF solution you can click either the ***My eOPF*** button to access your OPF information or ***Search eOPF*** button to access your reporting employees. With the ***My eOPF*** option, you will see a listing of all documents stored in your OPF listed by effective date of the document. If you choose the ***Search eOPF*** option, you see a filtering mechanism to list eOPFs based on your search criteria.

Viewing Your Own OPF

To view all contents of your eOPF in order by effective date of the documents, click on ***My eOPF***. After clicking ***My eOPF***, you see the *Folder* page, which displays a single row representing your eOPF folder and all the documents within.

The following figure displays the ***My eOPF Results*** page.



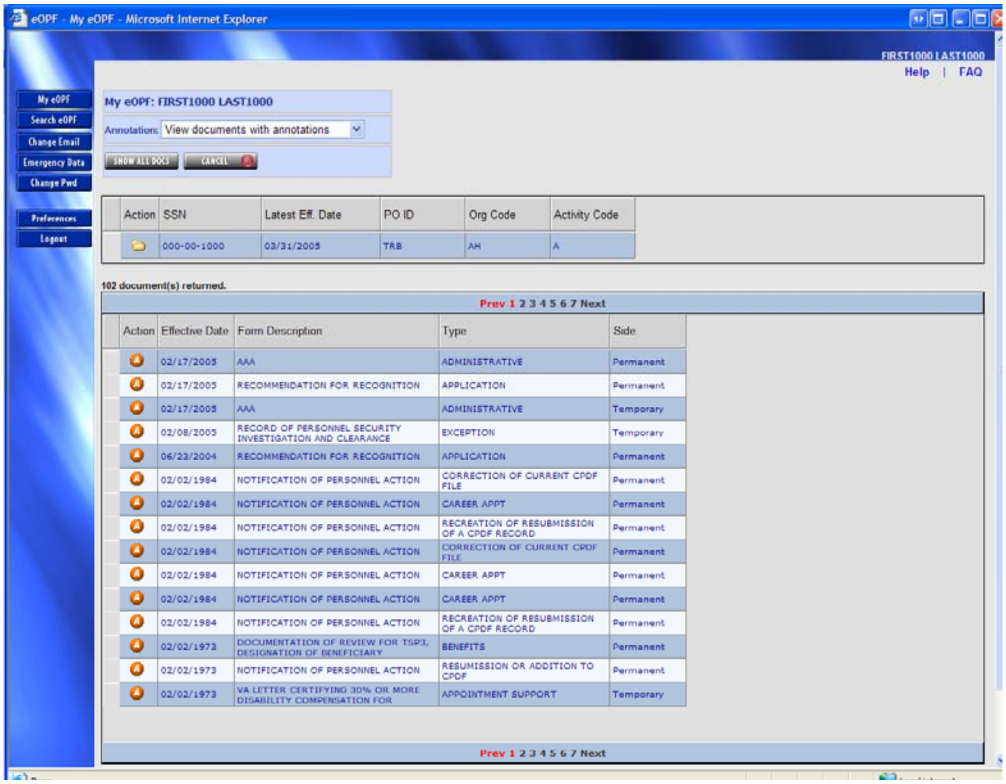
From the ***My eOPF Results*** page you can access:

- Open — Open your eOPF,
- Show All Docs — Access ***Show All Docs*** page and features,
- Emergency Data — Access your emergency contact info,
- View Career Brief — Access your career brief (if enabled),
- Clip Folder — Access clip folders associated your eOPF, or
- View PDQ — Access Position Description (if enabled).

Note:

A clip folder is a virtual collection of one or more documents from your eOPF. It is used for quick access by eliminating the need to search through all of the documents within your eOPF. These clips can be public or private. See ***Working with Paper Clips*** for more information.

The ***My eOPF Results*** page automatically opens your folder and lists its content.



Note:
Each time an eOPF document is viewed by you or any other individual, the event is logged electronically.

To View an eOPF Document Using "*My eOPF*":

1. **Click *My eOPF* on the eOPF main menu.**
   The ***Search Results*** page displays.

2. **From the *Annotation* drop-down list located at the top of the display, select whether you wish to view the document with or without annotations.**

Note:

An annotation is a transparent layer placed on top of the document that may be used to highlight, markup, or write comments. These layers can be public or private. The ability to create annotations is only provided to limited groups of people, such as HR specialists.

3. **From the *Search Results* page, search for and locate the eOPF document you would like to view.**

   If you have many documents, you may need to search multiple result list pages.

4. **Click the *Action* icon of the corresponding to the document you want to view and select the View option.** This action opens the document using Acrobat Reader in a new window.

5. **If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons located in the document viewer to navigate through the document.**

6. **When you are finished, click the *Close* button in the upper right corner of the document viewer window to close the viewer window.**

Searching for an eOPF

eOPF was designed to give you maximum flexibility in searching for personnel documents. HR users can search and retrieve documents for an individual employee by entering the SSN, employee ID or the employee's name. HR users can refine the search with other parameters, such as document effective date, form type, or form name, which can be effective, if users are trying to retrieve a specific document.

A more expansive list of documents from multiple eOPFs can be retrieved by using search criteria such as: PO ID, Activity Code, or Org Code. To enhance the usability and performance of eOPF, users should refine the search to minimize the number of search results. To facilitate system performance, eOPF has a default limit of 1,000 documents for the search result. However, this default setting is configurable and can be modified by the eOPF administrator.

The Form List is filtered into three categories: Common, All, and Agency. 'Common' option is a predetermine list of forms commonly found in the OPF. 'All Forms' option will provide the entire list of all forms defined in the eOPF repository. 'Agency' option will list only forms that are specific to the agency in which you are an active employee. Your default setting can be set in user preferences.

Note:

Important to note that the result set of documents found in your folder and presented to you is also filtered by the Form Setting you have chosen. If you want to see all documents in your folder then chose the “All Forms” choice.

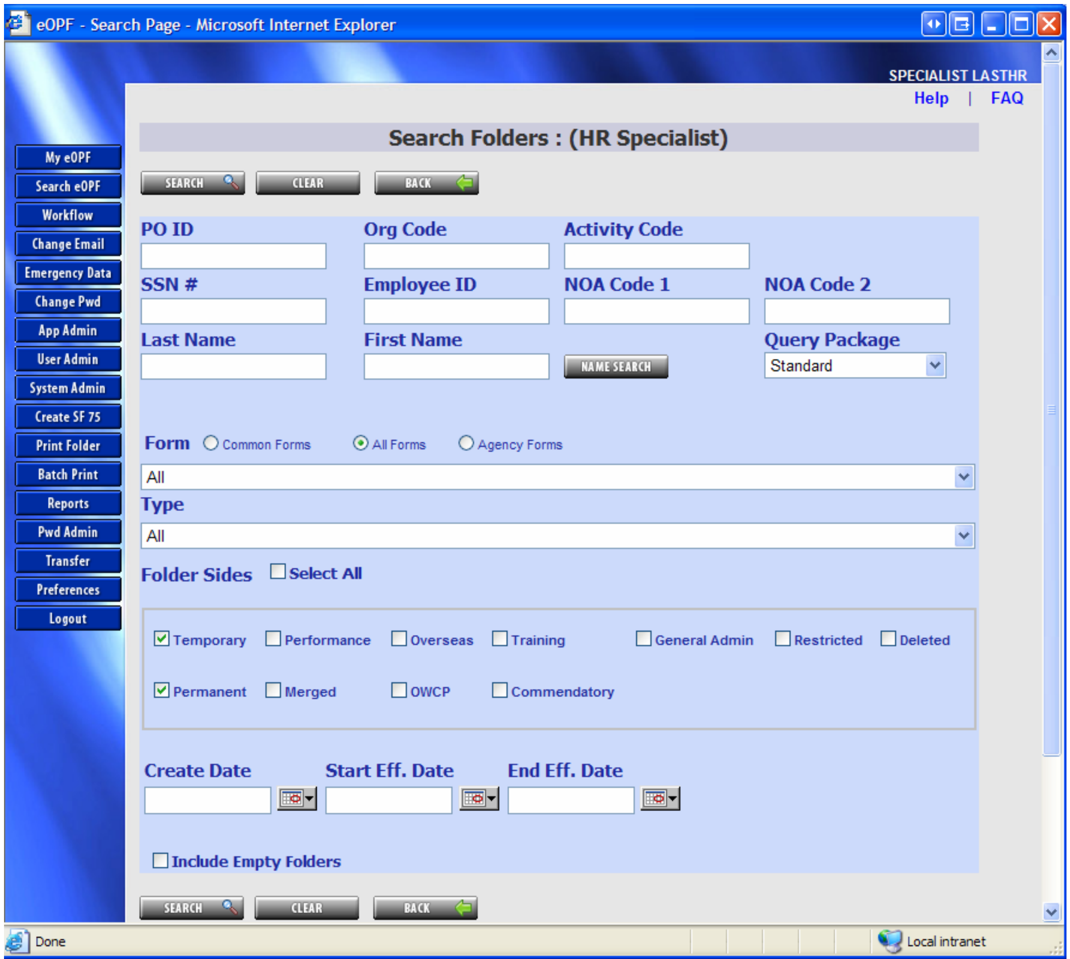
Searching for Folders

You can restrict your search for an eOPF folder by entering several criteria on the *Search Folders* page. You may also search for empty folders by checking the “Include Empty Folders” checkbox.

To Search for an eOPF:

1. **Click the *Search eOPF* button from the main menu on the eOPF application to open the *Search Folders* page.**
   This page allows you to query by fields such as SSN, Last Name, Activity Code, and Organization Code.

This figure displays the ***Search Folders*** page.



2. **On the *Search Folders* page, enter your choice of one or more of the following fields: SSN, Form/Type, Last Name, First Name, Employee ID, NOA Code, Create Date, Start Eff. Date, End Eff. Date, PO ID, Activity Code, Org Code, and/or Folder Section. You may also search for empty folders by checking the 'Include Empty Folders' checkbox.**

The Form List is filtered into three categories: Common, All, and Agency. 'Common' option is a predetermine list of forms commonly found in the OPF. 'All Forms' option will provide the entire list of all forms defined in the eOPF repository. 'Agency' option will list only forms that are specific to the agency in which you are an active employee. Your default setting can be set in user preferences.

Note:

Important to note that the result set of documents found in your folder and presented to you is also filtered by the Form Setting you have chosen. If you want to see all documents in your folder then chose the “All Forms” choice.

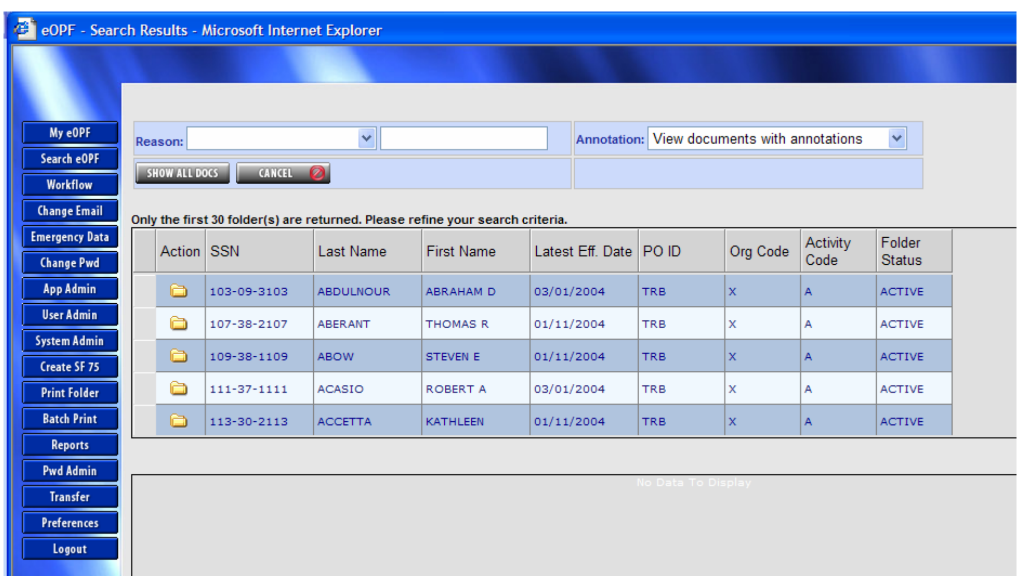
The following table describes the search fields on the eOPF *Search Folders* page.

Field	Description
PO ID	Use this field to retrieve users by PO ID. This field supports wildcards, such that if you put in part of a PO ID code plus the ‘%’ character, it will return all valid PO IDs matching that portion. (For example, entering ‘A%’ will also return PO ID’s AA, AB, AC, etc.)
Activity Code	Enter an activity code in this field to retrieve eOPFs by Activity Code. This field supports a wildcard, such that if you put in part of an Activity Code plus the ‘%’ character, it will return all valid Activity Codes matching that portion. (For example, entering ‘A%’ will also return Activity Codes AA, AB, ABA, etc.)
NOAC 1&2	Use this field to retrieve documents by Nature of Action Code (NOAC). This field supports a wildcard, such that if you enter part of an NOAC plus ‘%’ character, it will return all valid NOACs matching that portion. (For example, entering ‘1%’ will return NOACs 101, 130, 170, etc.)
Org Code	Enter an organization code in this field to retrieve eOPFs by Org Code. This field supports a wildcard, such that if you put in part of an Org Code plus the ‘%’ character, it will return all valid Org Codes matching that portion. (For example, entering ‘A%’ will also return Org Codes AA, AB, ABA, etc.)
SSN	Enter the entire social security number of the person whose documents you wish to retrieve either with or without hyphens.
Query Package	Query Types are created using the App Admin functionality of eOPF. EOPF administrators and those with access to the App Admin can create custom Query Types of commonly searched groups of documents, which are referred to as *Form Packages*.
Employee ID	Enter the entire employee identifier of the person

Field	Description
	whose documents you wish to retrieve either with or without hyphens.
Last Name	Enter the last name of the person whose document you wish to retrieve. You can use partial names plus the '%' character as search parameters and the system will automatically use that partial name as a "wildcard" and filter based on all last names beginning with the partial name entered.
First Name	Enter the first name of the person whose document you wish to retrieve. You can use partial names plus the '%' character as search parameters and the system will automatically use that partial name as a "wildcard" and filter based on all first names beginning with the partial name entered.
"Include Empty Folders" checkbox	This allows you to list folders that have no documents in them. This may be the result of a new employee being added to the eOPF repository.

3. **Once you enter the date into the search fields you want to use, click the SEARCH *Search* button.**
   The ***Search Results*** page appears.

The following figure shows the ***Search Results*** page.



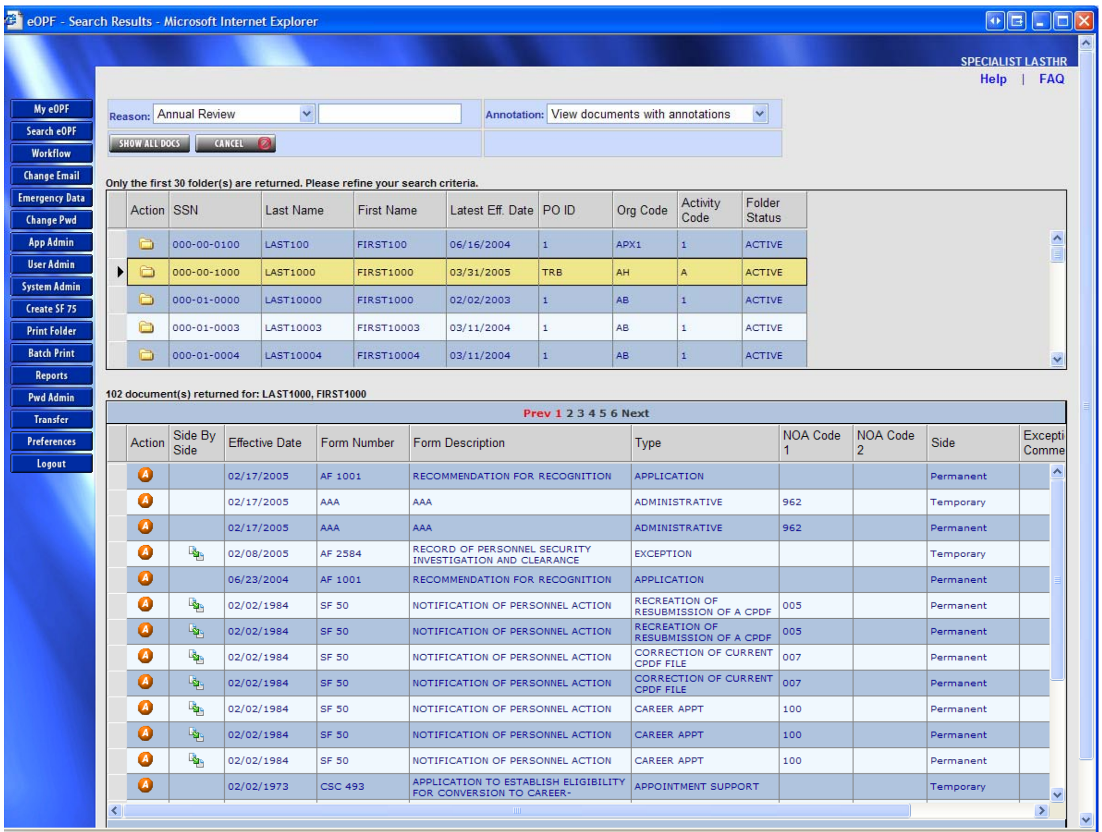
4. **Click on the *Folder Action* icon to the left of the folder you would like to view and select the Open Open option to display the documents contained in the chosen folder.**
   The ***Document List*** displays for that folder.

-OR-

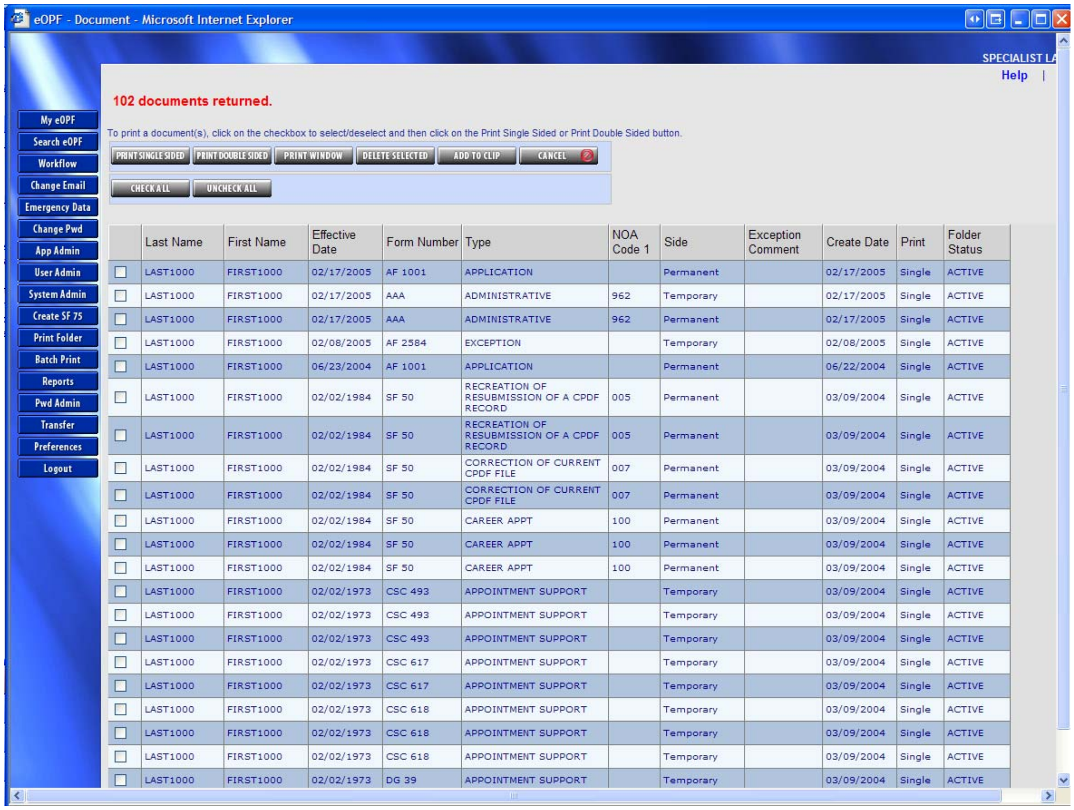
Click the 

Show All Docs **button to list all documents in all folders listed that meet the search criteria.** When documents are displayed, the Print function is activated.

If you open a folder, the ***Document List*** displays all documents within the selected folder. The following figure shows an opened folder and the corresponding ***Document List***.



The following figure displays the ***Show All Documents*** page.



Note:

The global setting ***Max Folders to View*** can be changed to reduce or lengthen the list of folders found that met all search criteria. It is treated as a cutoff point. If you have 10 folders that meet the search criteria, but the ***Max Folders To View*** is set to five, then only the first five folders are accessible. This setting is a global setting controlled by the administrator. Typically, the default setting is set to a maximum of 30 folders.

Searching for Folders by Last Name and/or First Name

You can search eOPF folders by last name and/or first name using the *Name Search* button.

To Search for Folders by Name:

1. **On the *Search Folders* page, enter all or part of the *Last Name* and/or *First Name* fields and then click the**  ***Name Search* button.**
   The search results grid displays.

This figure shows search results from entering “Last1000%” in the ***Last Name*** field.

	SSN	Last Name	First Name	Org Code
◯	000-00-1000	LAST1000	FIRST1000	AH
◯	000-01-0000	LAST10000	FIRST1000	AB
◯	000-01-0003	LAST10003	FIRST10003	AB
◯	000-01-0004	LAST10004	FIRST10004	AB
◯	000-01-0005	LAST10005	FIRST10005	AB
◯	000-01-0006	LAST10006	FIRST10006	AB

2. Select the *Name* of the employee by clicking the corresponding radio button and click the SELECT *Select* button.

The ***Search*** page is refreshed and the SSN, first name, and last name fields are populated with the selected employee data.

3. Click the SEARCH *Search* button.

The ***Search Results*** page appears.

The following figure displays the ***Search Results*** page.

1 folder(s) returned.

	Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	🗀	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE

4. **Since your search results only brought back one folder, the resulting folder is opened in the document list below.**

The following figure displays the ***Search Results*** page.

02 document(s) returned for: LAST1000, FIRST1000

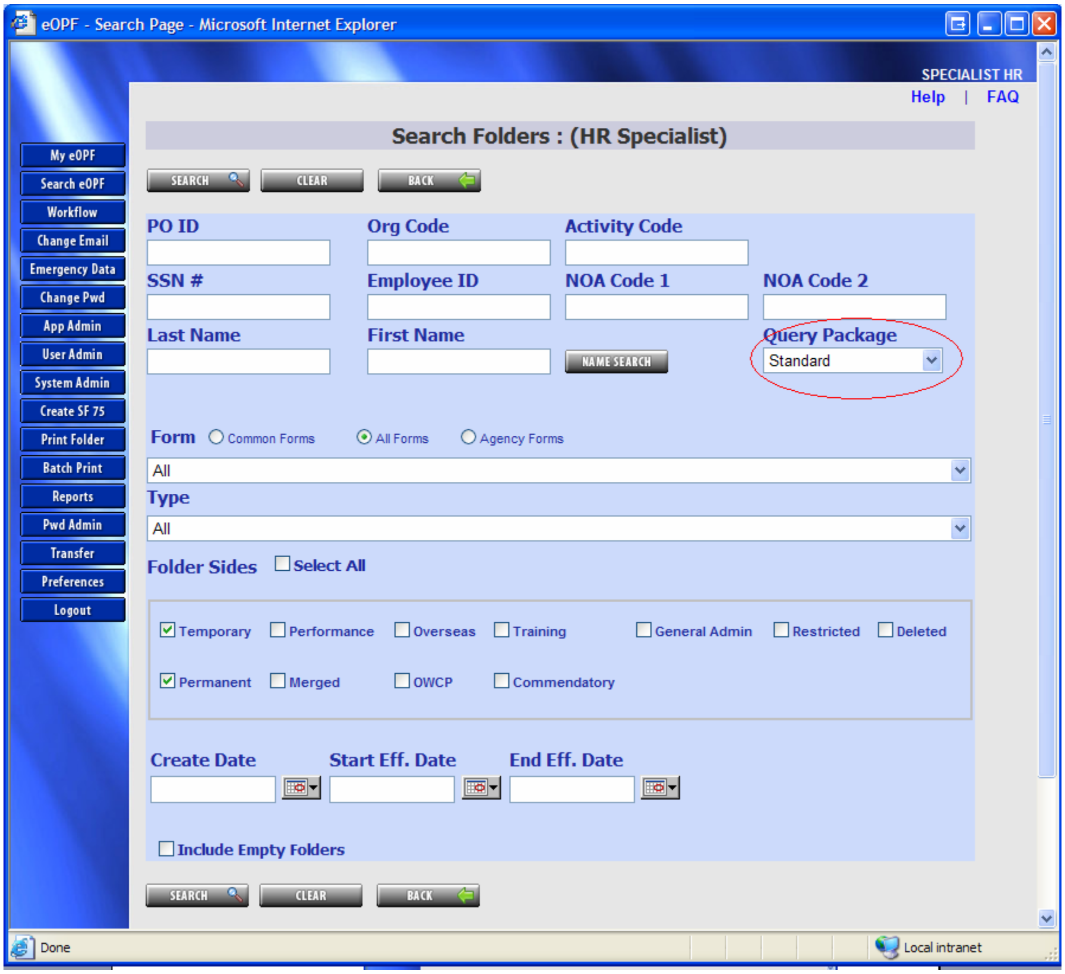
Prev 1 2 3 4 5 6 7 Next

Action	Side By Side	Effective Date	Form Number	Form Description	Type	NOA Code 1	NOA Code 2	Side	Excep Comm
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Temporary	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Permanent	
		02/08/2005	AF 2584	RECORD OF PERSONNEL SECURITY INVESTIGATION AND CLEARANCE	EXCEPTION			Temporary	
		06/23/2004	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1973	CSC 493	APPLICATION TO ESTABLISH ELIGIBILITY FOR CONVERSION TO CAREER-	APPOINTMENT SUPPORT			Temporary	

Searching for Documents by Query Package

You search for specific documents within a folder or across folders using the ***Query Package*** field on the search interface.

This figure displays the ***Search Folders*** page with the ***Query Package*** field circled.



Query Packages are created using the ***App Admin*** functionality of eOPF. eOPF administrators and those with access to the ***App Admin*** will create custom Query Package types for commonly searched groups of documents, which are referred to as *Form Packages* in the App Admin module of eOPF.

For example, if an HR user queries SF-50/52's frequently, a query package can be created that allows the user to select that query type from the drop-down list in the search interface. This process streamlines the query process.

To Search for Query Packages:

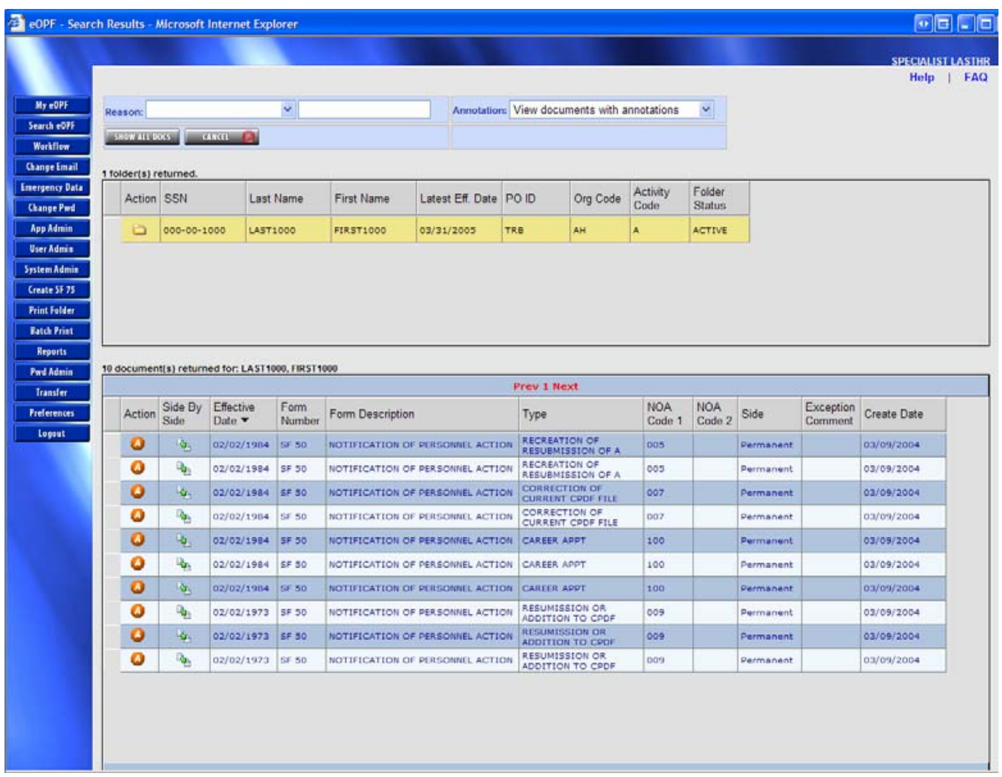
1. **From the *Search Folders* page, enter the *SSN* of the employee for whom you are searching.**

2. **Select a *Query Package* from the drop-down list.**

3. **Click the SEARCH *Search* button.**
   The ***Search Results*** page displays.

4. **From the *Search Results* page, click on the *Folder Action* icon and select the Open Open option to display the documents contained in the chosen folder in the document result list.**

The following figure shows the search results from selecting SF50/SF52 from the ***Query Package***.



Viewing an eOPF Document

After you locate an eOPF, you can view and/or print a document(s) within the folder. However, you must first enter a reason for accessing the document(s). A reason for viewing the document is recorded in the eOPF repository and is tracked for auditing and reporting purposes.

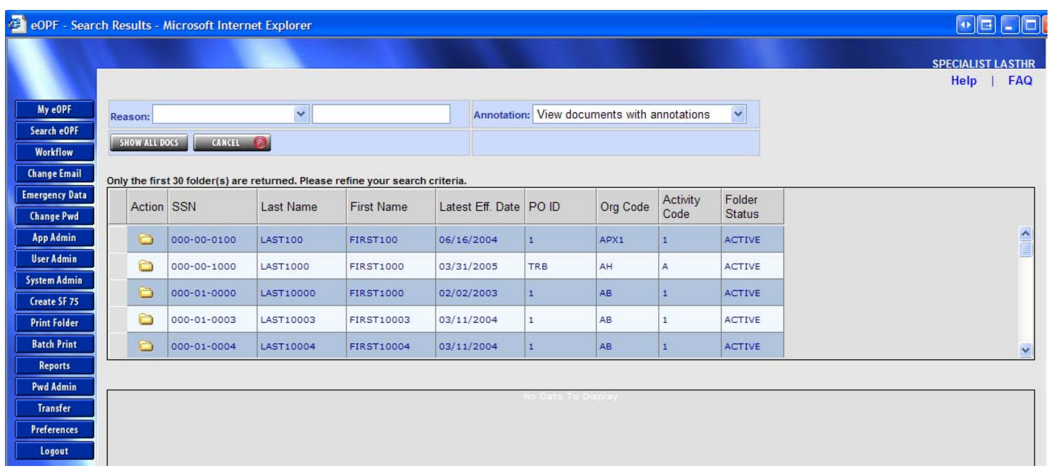
Note:

Each time you view an eOPF document that is not your own, the action is logged electronically capturing your eOPF ID, date/time, and reason for viewing the document.

This section describes how to view documents from the *Search Results* page, which displays the contents of a single eOPF. In addition, you can view documents from the *Show All Documents* page, which displays all documents found in *all* folders meeting your search criteria.

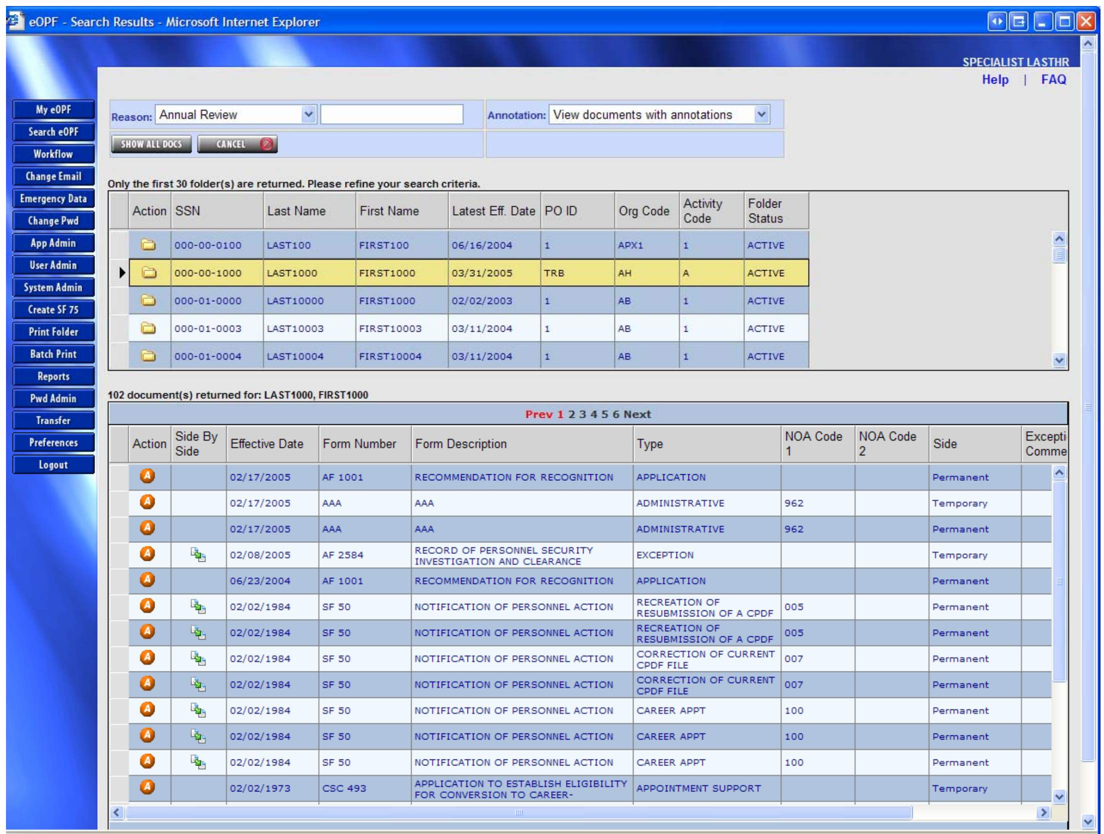
To View an eOPF Document:

1. **Search for and locate the eOPF folder containing the document(s) you want to view.**
   The ***Search Results*** page appears.



2. **From the *Search Results* page, click on the *Folder Action* icon and select the Open Open option to display the documents contained in the chosen folder in the document result list**

This figure displays the ***Search Results*** page.



3. **From the *Reason* drop-down list, select a reason for viewing this document.**
   If you select *Other* as the reason, you must type an additional description in the field provided to the right of *Reason* drop-down list. You may also place text in the field for any selected reason. This text will be stored.

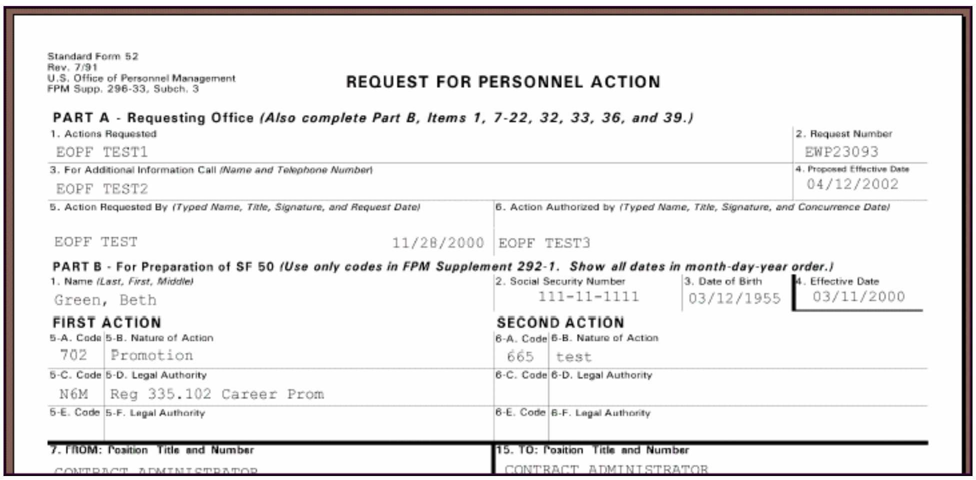
4. **Select whether you want to include annotations or not by choosing an *Annotation* option located at the top of the page.**
   The default setting is to include any public annotations on the selected documents.

Note:

An annotation is a transparent layer place on top of the document that may be used to highlight, markup, or write comments. These layers can be public or private. The ability to create annotations is only provided to limited group of people such as HR specialists.

5. **Click the *Action* icon next to the corresponding document you want to view and select the View option to view the document.**
   The document opens using Acrobat Reader in a new window.

   The following figure displays a sample document.


Standard Form 52
Rev. 7/91
U.S. Office of Personnel Management
FPM Supp. 296-33, Subch. 3

REQUEST FOR PERSONNEL ACTION

PART A - Requesting Office *(Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)*

1. Actions Requested	2. Request Number
EOPF TEST1	EWP23093
3. For Additional Information Call *(Name and Telephone Number)*	4. Proposed Effective Date
EOPF TEST2	04/12/2002

5. Action Requested By *(Typed Name, Title, Signature, and Request Date)*	6. Action Authorized by *(Typed Name, Title, Signature, and Concurrence Date)*
EOPF TEST 11/28/2000	EOPF TEST3

PART B - For Preparation of SF 50 *(Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)*

1. Name *(Last, First, Middle)*	2. Social Security Number	3. Date of Birth	4. Effective Date
Green, Beth	111-11-1111	03/12/1955	03/11/2000

FIRST ACTION

5-A. Code	5-B. Nature of Action
702	Promotion
5-C. Code	5-D. Legal Authority
N6M	Reg 335.102 Career Prom
5-E. Code	5-F. Legal Authority

SECOND ACTION

6-A. Code	6-B. Nature of Action
665	test
6-C. Code	6-D. Legal Authority
6-E. Code	6-F. Legal Authority

7. FROM: Position Title and Number	15. TO: Position Title and Number
CONTRACT ADMINISTRATOR	CONTRACT ADMINISTRATOR

6. **If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons to navigate through the document.**

7. **When you are finished, click the *Close* button to close this window.**

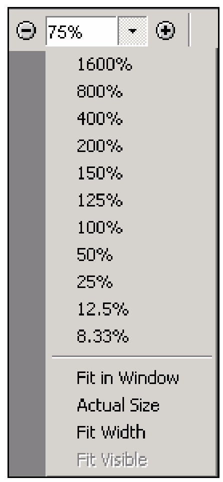
8. **On the *Search Results* page, click the CANCEL *Cancel* button to return to the search window or select a new document to view.**

Changing the Viewing Size of an eOPF Document

To Change the Page Size:

1. **Search for and open the desired eOPF document.**
   If there are multiple pages, navigate to the page you wish to view by using the *Next Page* and *Previous Page* buttons.

2. **Click the *Zoom In* or *Zoom Out* buttons to change page sizes.**
   You can also select a view size from the drop-down list. The numbers represent the percent of original size.



3. **To return to page size, select *Fit in Window* from the drop-down list.**

Annotating an eOPF Document

As an HR staff member, you may be given the authority by HR Management to make notes on eOPF documents. eOPF has an annotation feature to allow you to make notes on documents, which are preserved as a layer that sits on top of the original document. The benefit is that the document can be viewed or printed in its original state, or with the annotations. Further, if multiple HR staff members make annotations, each is saved as a separate layer, which preserves the information about who added what information.

Annotations are added separately to each individual page of a document. Therefore, annotating multi-paged documents requires you to navigate to each page and make the annotations for that page only.

eOPF annotations tools allow you to freehand draw, apply shapes, add text annotations directly on the page, and use a highlighter. The individual HR management teams will determine the scope and accessibility of the annotations.

Note:

There are two classifications of an annotation: **public** and **private**. If you designate an annotation as public, it can be viewed, edited and deleted by anyone who views the document via the eOPF system. Private annotations can only be viewed and/or edited by the user that created the annotation and an eOPF HR Specialist.

Annotations should only be used to improve the legibility of the eOPF document or as a note to a colleague in HR. Such notes might include annotating corrected items on an SF-50 that were corrected by a different SF-50. For example, a “002” correction is generated to change a specific data element on an SF/50, however that action applies and corrects all previous actions. The annotation feature can be used by HR staff to show corrected data found on earlier SF-50s. Please adhere to current standards regarding annotations of documents.

Note:

Since an annotation is considered a modification to an eOPF, you may not add annotations on any documents that belong to your own OPF. Annotations should be used sparingly and judiciously. HR users should ensure that annotations, intended to be temporary, are suspended and removed when no longer needed. Private annotations will not be viewable by the employee, but may be provided to employees or employee representatives during Discovery in litigation or appellate procedures.

To Annotate a Page in an eOPF Document:

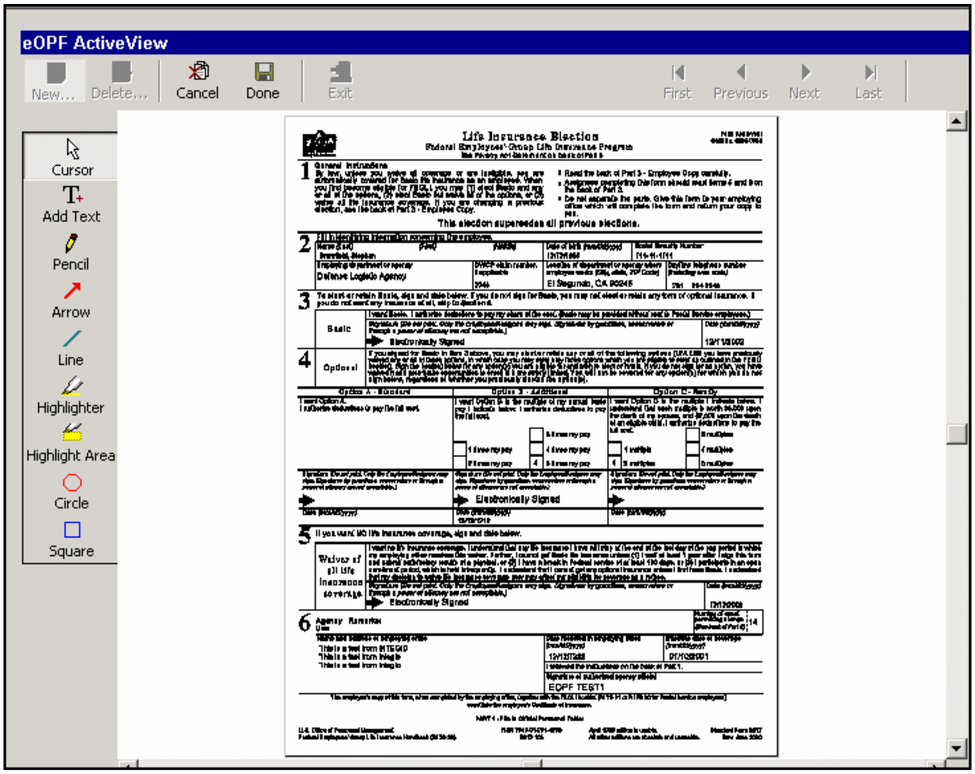
1. **Search for and open the desired eOPF document.**

2. **From the *Reason* drop-down list, select a reason for viewing this document.**
   If you select *Other* as the reason, you must type an additional description. You may type addition description for any Reason selected.

3. **Open to Annotate by clicking the *Action* icon of the corresponding to the document you want to annotate and selecting the 

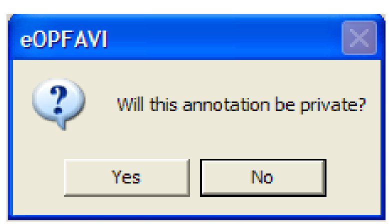
icon option.**
The *ActiveView* page appears.

The following figure displays the ***ActiveView*** page.



4. **Click the *New* button.**
The ***Private Annotation*** pop-up box appears.

The following figure displays the ***Private Annotation*** pop-up box.



5. **Select the *Yes* or *No* button (select *Yes* if you want the Annotation to be private).**
The ***ActiveView*** page reappears.

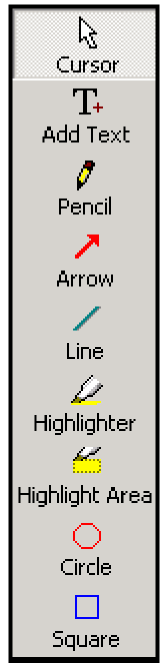
Note:

You can exit the annotation mode at any time by clicking the 

Cancel button. If you select ***Cancel***, your annotations will not be saved.

---

6. **Select the annotation type of your choice from the tool list shown in the following figure.**



7. **On the page, use your mouse to add the desired annotation(s).**

8. **If you wish to add additional annotations with another tool, repeat Steps 6-7 with the new annotation tool.**

9. **When you finish adding annotations, click the *Done* button.**

10. **If you would like to add additional annotations to other pages, navigate to the next desired page using the *Next Page* and *Previous Page* buttons. Then, repeat Steps 6-7.**

11. **When you finish annotating the document, click the *Exit* button to close the document view window.**

Note:
Access to add and/or delete annotations from a document is generally restricted to a select group within HR.

Removing an Annotation from a Document

An eOPF user must have the appropriate permissions in order to add or remove annotations on eOPF documents to preserve the integrity of the data maintained in eOPF. This is generally restricted to a select group within the HR staff and is not enabled for non-HR employees.

To Remove an Annotation from an eOPF Document:

1. **Search for and open the desired eOPF document.**

2. **From the top of the *Search Results* page, select *View Documents with Annotations* from the *Annotations* drop-down list.**

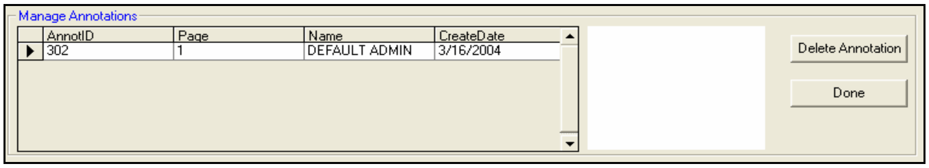
3. **From the *Reason* drop-down list at top of *Search Results* page, select a reason for viewing the document.**
   If you select *Other*, you must type a reason in the additional field to the right of the *Reason* drop-down list such as “Removing an annotation.”

4. **Open to Annotate by clicking the *Action* icon of the corresponding to the document you want to annotate and selecting the Annotate icon.**
   The document opens in an *ActiveView* window.

5. **If the document contains multiple pages, use the *Previous Page* and *Next Page* buttons to scroll to the page that contains the annotation(s) you wish to remove.**

6. **Click the *Delete* button, which opens a *Delete Annotation* box below the viewer.**

The following figure displays the ***Delete Annotation*** box.



7. **Select the annotation, then click the**  ***Delete Annotation*** **button and confirm the deletion when prompted.**

8. **Click the *Done* button when multiple annotations exist and not all annotations are being deleted.**
   The selected annotation(s) are now permanently removed from the document.

Chapter 5: Adding Documents

eOPF provides the ability to manually add new documents into the system by either scanning paper documents or importing other electronic files into the database.

Preparing for Scanning

Users can add new documents into the system via scanning. Before paper documents are scanned, there are some preparation steps that should be performed.

Preparing Documents

Document preparation is an essential part of the scanning process. In order to be ready for scanning, documents must meet the following requirements:

- All staples or other metal fasteners must be removed.
- Odd-sized documents; poor quality original documents (including documents with multi-color ink and paper or documents with torn edges) should be either photocopied or reduced.
- Any folds or irregularities should be straightened.

Setting Up a Scanner for New Scanning

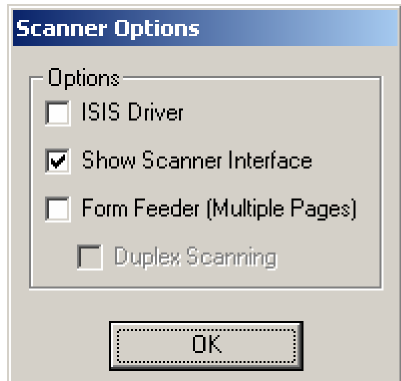
If a new scanner has been added to the network or system, users must setup the scanner configuration inside of eOPF. After setting the scanner configuration, users may proceed with the scanning process.

To Configure a Scanner:

1. **Search for the folder into which the new document belongs using the eOPF *Search Folders* page. (See *Searching for an eOPF* for detailed instructions.)**
2. **Select the reason from the *Reason* drop-down list for working on the selected folder.**
3. **Click on the *Folder Action* icon and select the Add Doc *Add Doc* option to add a new document to this folder.**

4. After the scanning interface opens, click *Scan*.
The *Scanner Options* window appears.

This figure displays the ***Scanner Options*** window.

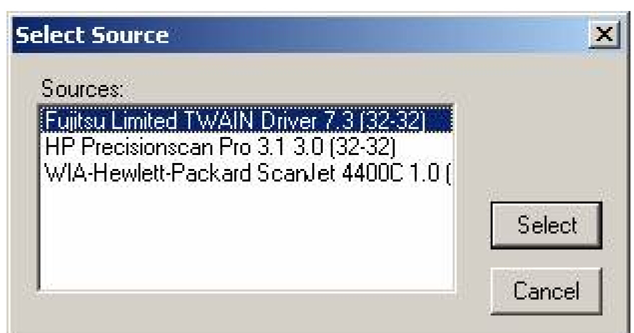


5. Check *Show Scanner Interface* and click the 

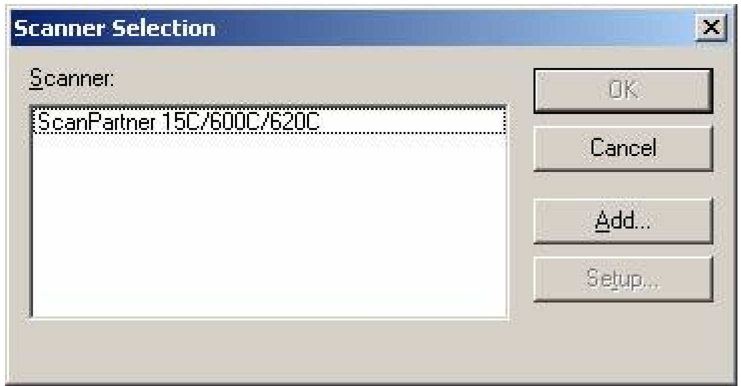
***OK* button.**
A list of scanners is presented.

6. Select your scanner from the list.
The window you see depends upon the type of scanner you are using.

The following figure displays the Twain ***Select Source*** window.



The following figure displays the ISIS ***Scanner Selection*** window.



7. **Follow the specific guidance for setting up your scanner found in your manufacturer's documentation.**

Downloading the Scanner/Annotation OCX

You will need to configure your browser to successfully download the Scanner/Annotation OCX, which is required for the first access to the scanning function. Your eOPF administrator will be able to assist you with these settings. The settings in the list that follows are for Internet Explorer.

Internet options-->Advanced

enable || Enable Install on Demand(other)

Internet options-->Security

ActiveX controls & plug-ins

Download signed ActiveX controls

Enable

Download unsigned ActiveX controls

Prompt

Initialize and script ActiveX controls not marked as safe

Prompt

Run ActiveX controls and plug-ins

Enable

Script ActiveX controls marked safe for scripting

Enable

Downloads

Enable

Scripting

Active Scripting

Enable

Warning:
If you need to modify Scanner settings, only change the Brightness and the Contrast. Under no circumstances should you modify the Black/White, Dithering or Page Size. Please contact your eOPF administrator if you need to make additional scanner configurations.

Scanning Documents into eOPF

Now that you have completed the preparatory steps, you are ready to begin scanning documents. Directions for single-sided and double-sided documents vary slightly; be sure to follow the correct set of instructions. If your scanner has a form feeder that you are using then make sure you check the form feed check box when prompted.

To Scan a Single-Sided Document into eOPF:

1. **Search for the folder that the new document belongs to using the eOPF Search Folders page.**

   (See *Searching for an eOPF* for detailed instructions.)

2. **From the *Folder* page, select the reason from the *Reason* drop-down list for working on the selected folder.**

3. **Click on the *Folder Action* icon and select the Add Doc *Add Doc* option to add a new document to this folder.**

4. **Place the document in the scanner according to the manufacturer's instructions.**

5. **After the scanning interface opens, click *Scan*.**

6. **If using ISIS scanner drivers, verify the *ISIS* checkbox is selected, and then click the** 

***OK* button.**

7. **If using TWAIN scanner drivers, deselect the *ISIS* checkbox, and then click the** 

***OK* button.**

8. **If you are using the form feeder on your scanner make sure you check the Form Feeder checkbox.**
   Do this even if you are only scanning a single page through the feeder.

9. **Select the appropriate scanner from the *Source* dialog box and click the *Select* button.**
   The document appears.

10. **Click the** 

***Save* button.**
    The *Document Info* dialog box appears. The SSN field will already contain the SSN of the selected folder. The first and last name fields will also pre-fill based upon the SSN associated with the selected folder.

11. **From the *Form* drop-down list, select the appropriate *Form Name*.**

12. **From the *Type* drop-down list, select the appropriate *Form Type*.**

13. **In the *Folder* area, select the checkbox representing the folder section (Left Side, Right Side, EPF, etc.) in which the document will reside.**

Note:

If you do not mark a specific folder for the document, then eOPF defaults to the folder noted in the forms index. These defaults are based on the OPM guidelines. If you select a folder side other than one specified by the OPM guidelines, then eOPF will alert you by using a dialog box. This dialog box displays the predefined side type and your initial selection, at which point you can either accept or reject your choice of folder side.

---

13. **In the *Effective Date* field, select the appropriate effective date of the document from the calendar.**

14. **If the document needs to be inserted into workflow, select a subflow name from the *Workflow* drop-down list.**
    If no value is selected, the system automatically routes the document through a default workflow defined by the eOPF administrator.

Typically, the default flow routes it directly to the folder without user intervention.

15. **Click the *Save* button.**
    The scanning application closes and returns you to eOPF.

16. **Verify the information is accurate, and then click *Yes*. A confirmation box appears.**

17. **Click the *OK* button.**

18. **Click *Close*.**
    A confirmation box appears.

19. **Click *Yes*.**

To Scan a Double-Sided Document into eOPF:

1. **Search for the folder in which the new document belongs using the eOPF *Search Folders* page. (See *Searching for an eOPF* for detailed instructions.)**

2. **From the *Folder* page, select the reason from the *Reason* drop-down list for working on the selected folder.**

3. **Click on the *Folder Action* icon and select the Add Doc *Add Doc* option to add a new document to this folder.**

4. **Place the document in the scanner according to the manufacturer's instructions.**

5. **After the scanning interface opens, click *Scan*.**

6. **If using ISIS scanner drivers, verify the *ISIS* checkbox is selected, and then click the *OK* button.**

7. **If using TWAIN scanner drivers, deselect the *ISIS* checkbox, and then click the *OK* button.**

8. **Select the *Form Feeder* checkbox, and then select the *Duplex* checkbox.**

9. **Click the *OK* button.**

10. **Select the appropriate scanner from the *Scanner Selection* dialog box and click the *Select* button.**

11. **Click the *OK* button to scan side one of the document.**
    The first side will scan.

12. **Load the second side into the scanner, and then click the *OK* button to scan side two of the document.**

13. **Click the *Save* button. The *Document Info* dialog box appears.**
    The *SSN* field will already contain the SSN of the selected folder. The first and last name fields will also pre-fill based upon the SSN associated with the selected folder.

14. **From the *Form* drop-down list, select the appropriate Form Name.**

15. **From the *Type* drop-down list, select the appropriate Form Type.**

16. **In the *Folder* area, select the checkbox representing the folder section in which the document will reside.**

17. **In the *Effective Date* field, select the appropriate effective date of the document from the calendar.**

18. **If the document needs to be routed into workflow, select a subflow name from the *Workflow* drop-down list.**
    If no value is selected, the system automatically routes the document through a default workflow defined by the eOPF administrator. Typically, the default flow routes it directly to the folder without user intervention.

19. **Click the *Save* button.**
    The scanning application minimizes or closes depending on your settings and returns you to eOPF.

20. **Verify the information is accurate, and then click *Yes*.**
    A confirmation box appears.

21. **Click the *OK* button.**

22. **Click *Close*.**
    A confirmation box appears.

23. **Click *Yes*.**

Scanning a New Page into an Existing eOPF Document

eOPF gives you the option of adding new pages to an existing document by scanning. First, users must prepare the documents for scanning. For information, please see *Preparing Documents*. Next, proceed to one of the scanning stations to scan the new document into eOPF.

If you are scanning a double-sided document, eOPF verifies that there are equal numbers of front and backsides of pages. If there are blank pages in your pile, you must scan them as well for uniformity. An eOPF administrator can delete blank pages later, if needed.

To Scan a New Page into an Existing eOPF Document:

1. **Search for the folder and document into which the new page belongs using the eOPF *Search Folders* page and Search Results page. (See *Searching for an eOPF* for detailed instructions.)**

2. **From the *Search Results* page, enter a *Reason* code for viewing and modifying the document.**

3. **Modify a document by clicking the *Action icon* of the corresponding to the document you want to modify and select the option.**

Note:
The only modification to the document is the addition of new pages.

---

4. **The *ActiveView* window opens with a view of the existing document.**

5. **Use the *Next Page* and *Previous Page* buttons to review the existing document and ensure that the new page you are about to scan will be saved in the correct location.**

6. **Click the *Scan* button to scan your new page.**

7. **If using ISIS scanner drivers, verify the *ISIS* checkbox is selected, and then click the *OK* button.**

8. **If using TWAIN scanner drivers, deselect the *ISIS* checkbox, and then click the *OK* button.**

9. **Select the appropriate scanner from the *Source* dialog box and click the *Select* button.**

10. **Click the OK *OK* button to scan the page and it will appear in the *ActiveView* window along with the other page(s) of your existing document.**

11. **If this page, or any page, needs to be deleted and rescanned, highlight that page and click the *Delete Page* button.**

12. **Once your document is complete, click the *Close* button.**

Importing Electronic Documents into eOPF

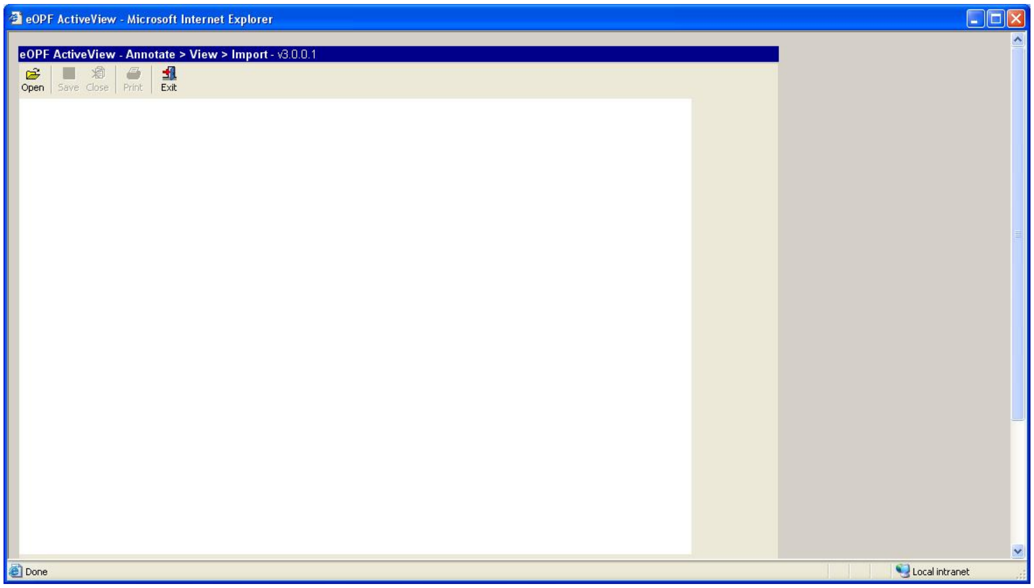
eOPF has the capability to import electronic files. Documents available in electronic format (image, PDF, Word document, etc.) can be added to an eOPF folder. eOPF supports file extensions: .tif, .bmp, .jpg, .gif, .pdf, .txt and .doc.

To Import a New Document:

1. **Search for the folder into which the new document belongs using the eOPF search page. (See *Searching for an eOPF* for detailed instructions.)**

2. **From the *Folder* page, select the reason from the *Reason* drop-down list for working on the selected folder.**

3. **Click on the *Folder Action* icon and select the Add Doc *Add Doc* option to add a new document to this folder.**



4. **Click the** 

Open **button.**
   The Select Local File to Open dialog box appears.

5. **Select the desired file and then click the** 

Open **button.**
   The selected file appears.

6. **Click the** 

Save **button.**
   The *Document Info* dialog box appears. The *SSN* field will already contain the SSN of the selected folder. The first and last name fields will also pre-fill based upon the SSN associated with the selected folder.

7. **From the *Form* drop-down list, select the appropriate *Form Name*. If you need an obsolete form then check the Obsolete Form checkbox to cause the application to list all forms including ‘Obsolete’ forms. Administrator’s can identify ‘Obsolete’ forms using the App Admin → Forms module.**

8. **From the *Type* drop-down list, select the appropriate *Form Type*. This will fill in the NOA Code value automatically based on *Type* selected.**

Note:

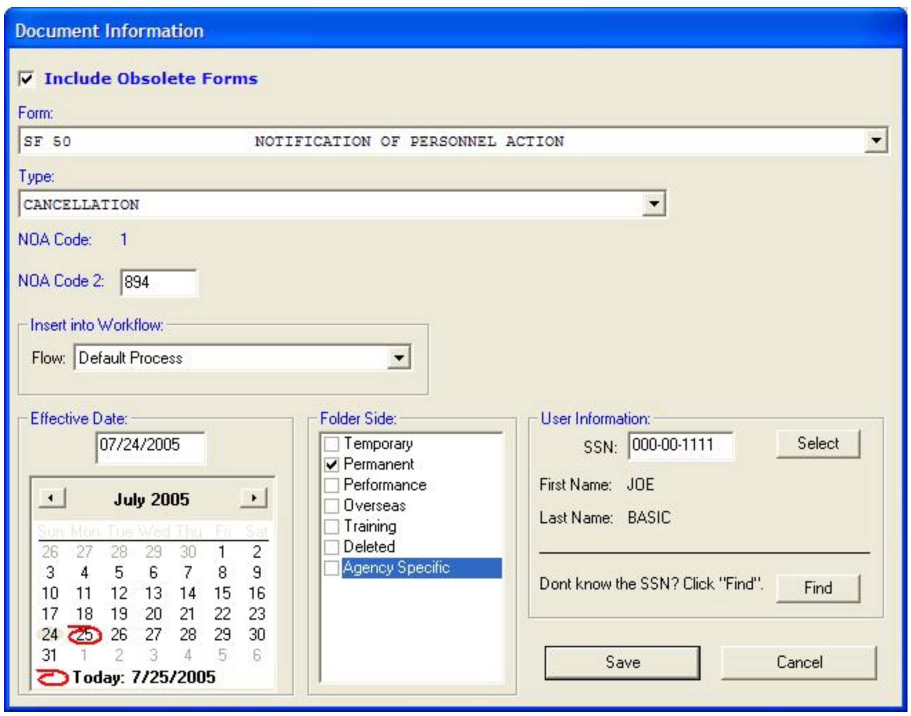
NOA Code 2 field is only available if the NOA Code field has been populated with a value.

9. In the *Folder* area, select the checkbox representing the folder side in which the document will reside.

10. In the *Effective Date* field, select the appropriate date from the calendar.

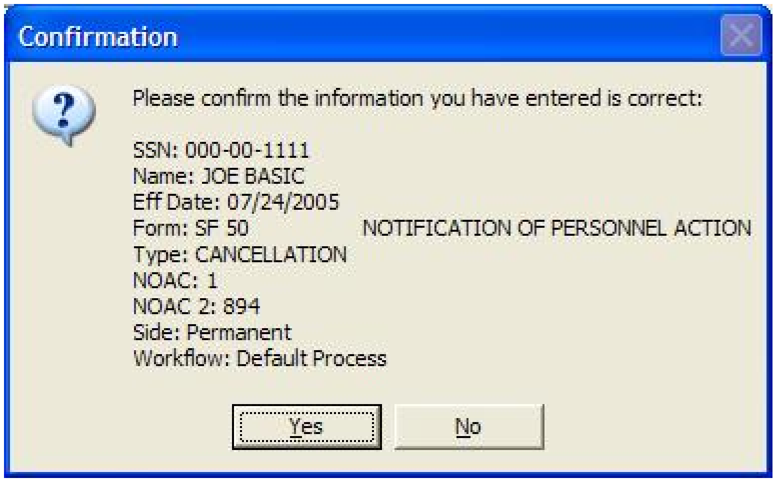
11. If the document needs to be routed into workflow, select a subflow name from the *Workflow* drop-down list.

If no value is selected, the system automatically routes the document through a default workflow defined by the eOPF administrator. Typically, the default flow routes it directly to the folder without user intervention.



12. Click the  ***Save* button.**

A index confirmation window appears.



13. **Verify the information is accurate, and then click *Yes*.**
    A confirmation box appears.

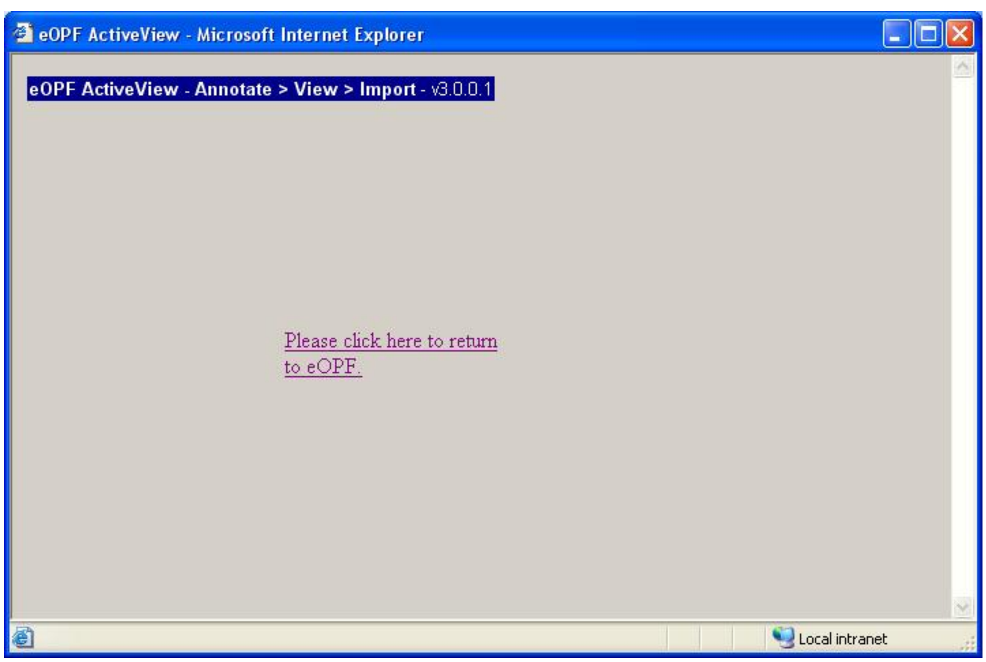
14. **Click the** 

Yes button.

15. **You are returned to the eOPF ActiveView window were you can import another document or exit the application.**
    The window is blank waiting for you to take an action.

Click the 

***Exit* and a return to eOPF page appears. Click on the "Please click here to return to eOPF." to re-establish active eOPF session.**



Importing a New Page into an Existing eOPF Document

Pages already available in electronic format (image, PDF, document, etc.) can be added to an existing document. eOPF supports the file extensions: .tiff, .bmp, .jpeg, .gif, .pcx, .pdf, .txt, and .doc.

To Insert a New Page from an Electronic File:

1. **Retrieve and open the desired eOPF document.**

2. **From the *Search Results*, enter a *Reason* code for viewing the document.**

3. **Modify a document by clicking the *Action* icon of the corresponding to the document you want to modify and select the option.**

Note:
The only modification of the document being done is the addition of new pages.

---

4. **Click the *Import* button.**
   A confirmation pop-up box appears.

5. **Click *Yes*.**
   The ***Page Import*** dialog box appears.

6. **Select the desired document, and then click the *OK* button.**
   A confirmation pop-up box appears displaying the following message "New Page was successfully imported."

7. **Click the *Close* button.**
   A ***Close Document*** confirmation pop-up box appears.

8. **Click *Yes*.**

Chapter 6: Printing

Although eOPF is designed to make HR more of a paperless process, there will be times when Federal statute requires a hard copy of an eOPF document. HR users are given the option to print the document with or without annotations.

Note:

eOPF will default to printing the documents without the annotations.

You can choose to print all or specific documents found in your eOPF. Using the ***My eOPF*** option, you can only print a single document at a time. Using the ***Search eOPF*** option, you can select one or more documents from your eOPF for printing.

Printing an eOPF Document Using *My eOPF*

To Print an eOPF Document:

1. **After clicking *My eOPF,* search for and locate the desired eOPF document to print.**
2. **Open a document by clicking the *Action* icon of the corresponding to the document you want to modify and select the View *View* option.**
   Do not forget to set your desired annotation setting. The default setting for printing annotations is *Print All Annotations*.

Note:

The column labeled ***Print*** on the ***Search Results*** and ***Show All Documents*** pages indicates whether the original document was a single or a double-sided document.

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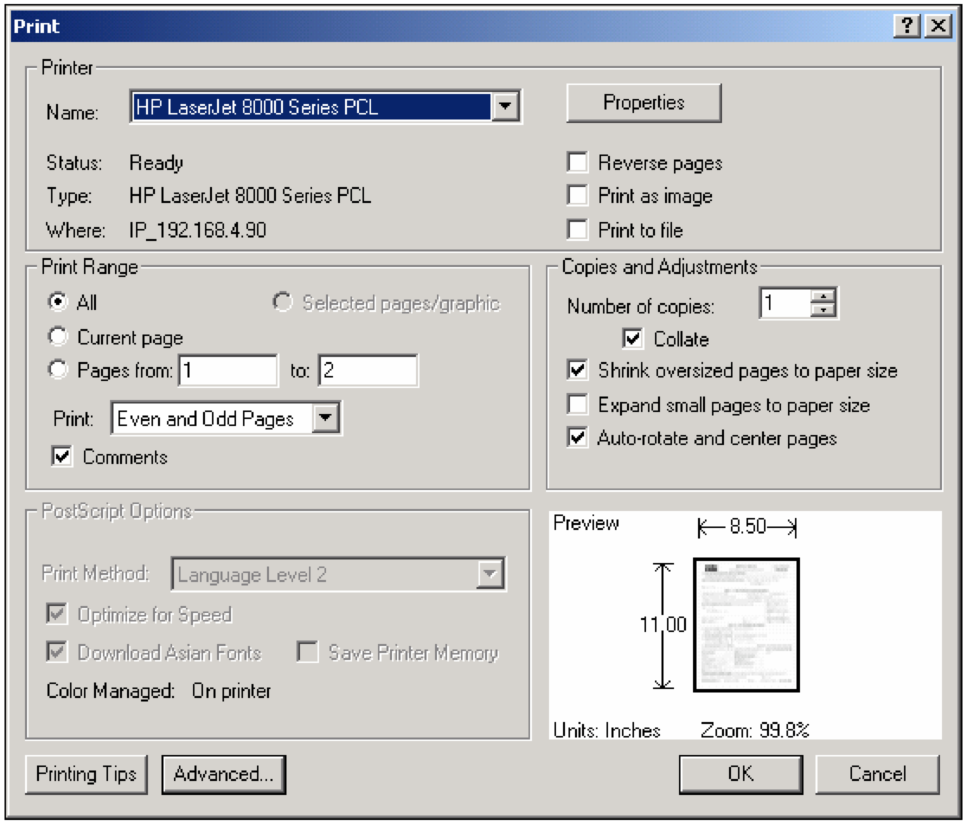
3. **On the document view window toolbar, click either the *Print* button, or select *File, Print* from the viewer window menu.**
   The *Print Dialog* box opens. Ensure that your printer settings are correct.

The following figure displays the ***Print Dialog*** window.



Note:

If you are printing a double-sided document, make sure that the printer selected is capable of performing duplex printing.

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4. **When you finish modifying the printer settings, click the *OK* button in the printer setup dialog box.**
   The document begins to print.

5. **Click the *Cancel* button to exit the print mode.**

6. **Click the**  ***Close* button to close the document view window.**

Printing an eOPF Document

To Print an eOPF Document:

1. **Search for and open the desired eOPF document.**

Note:

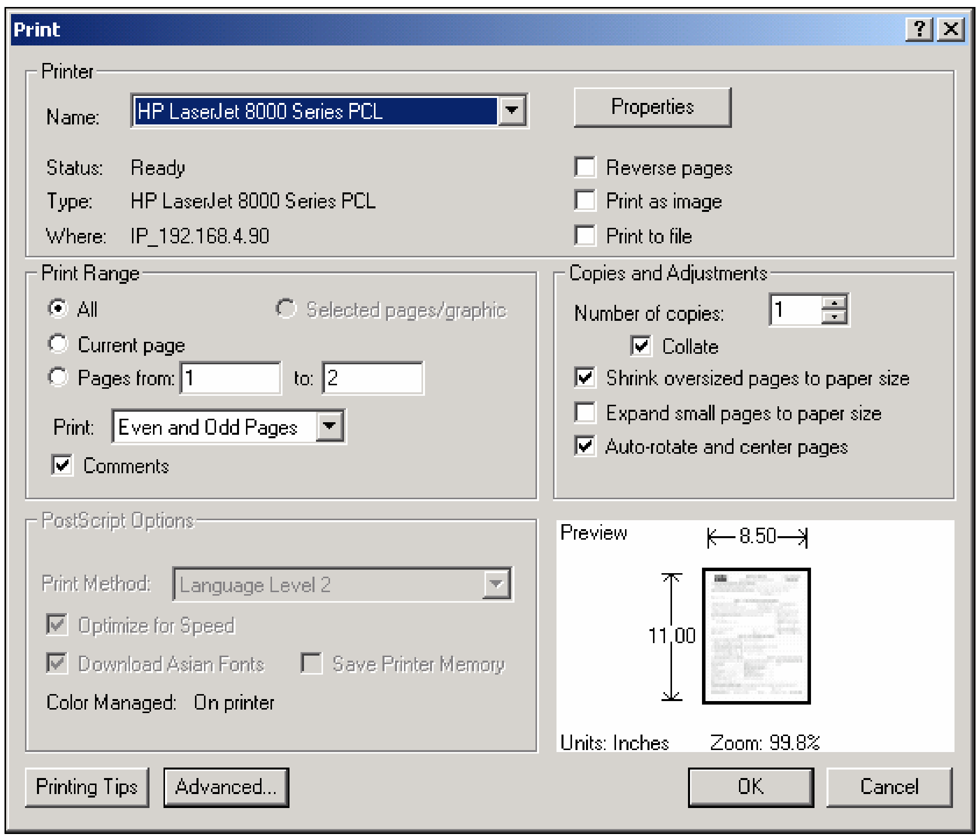
eOPF will default to printing the documents without the annotations.

2. To preclude annotations from printing, insure *View documents without annotations* is selected from the *Annotation* field.

3. On the document view window toolbar, click the Print button, or select File-Print from the Adobe Reader menu.
The *Print Dialog* box opens.

4. Ensure that your printer settings are correct.

The following page displays the ***Print Dialog*** box.



Note:

If you are printing a double-sided document, make sure that the printer selected is capable of performing duplex printing.

5. When you are done modifying the printer settings, click the 

***OK* button in the printer setup dialog box.**
The document will start printing.

6. **Click the 

Cancel button to exit the printing mode without printing.**

7. **Click the  *Close* button to close out of the document view window.**

Printing an Entire eOPF Folder

HR users have the ability to print the entire contents of an employee's eOPF with one command. Users have the option of printing with or without annotations and printing either selected Folders or the entire eOPF.

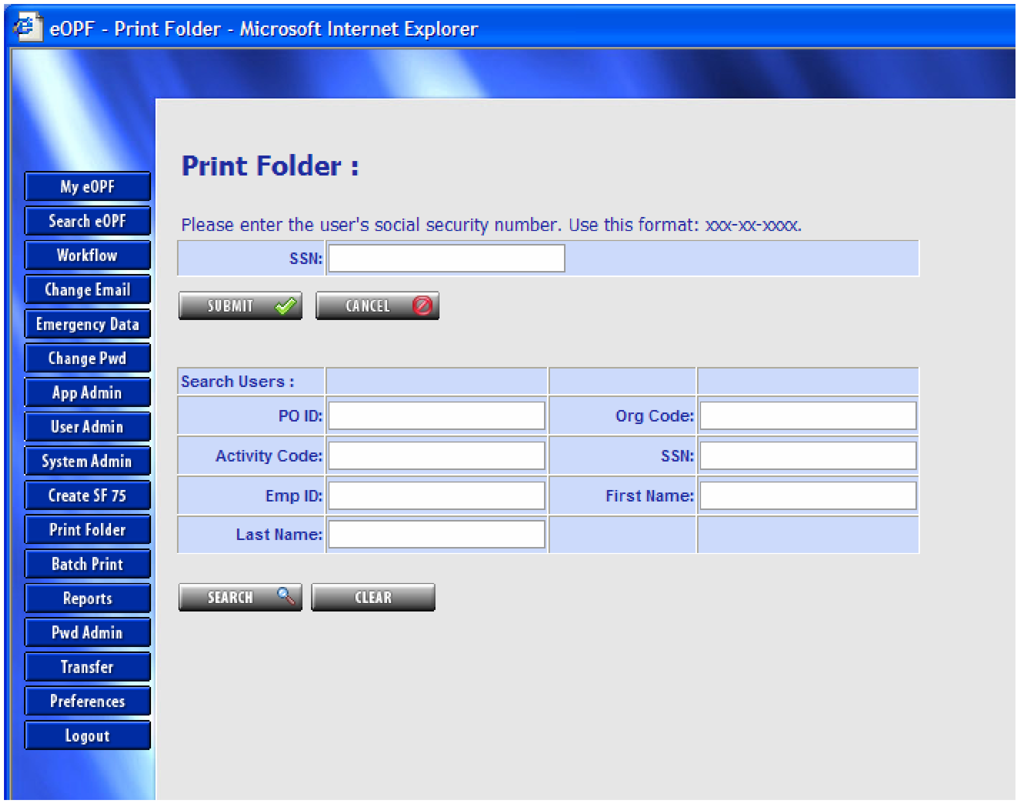
Double-sided documents can be printed double-sided, provided that you select a duplex printer as your eOPF printer. If you only have access to a single-sided printer, the document will print the entire folder in a single-sided format.

To Print the Entire Contents of an eOPF:

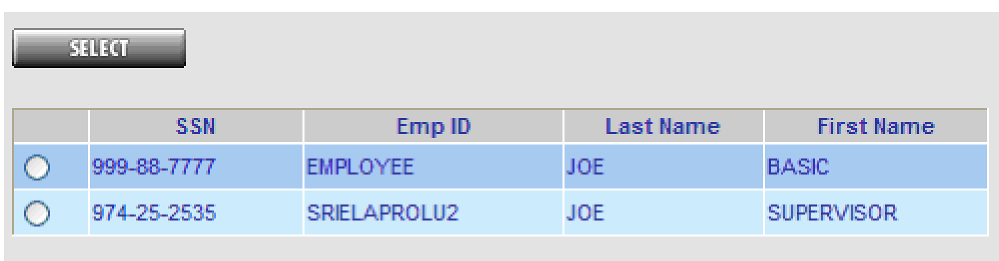
1. **Click the 

Print Folder button on the eOPF main menu.**
   The ***Print Folder*** page displays.

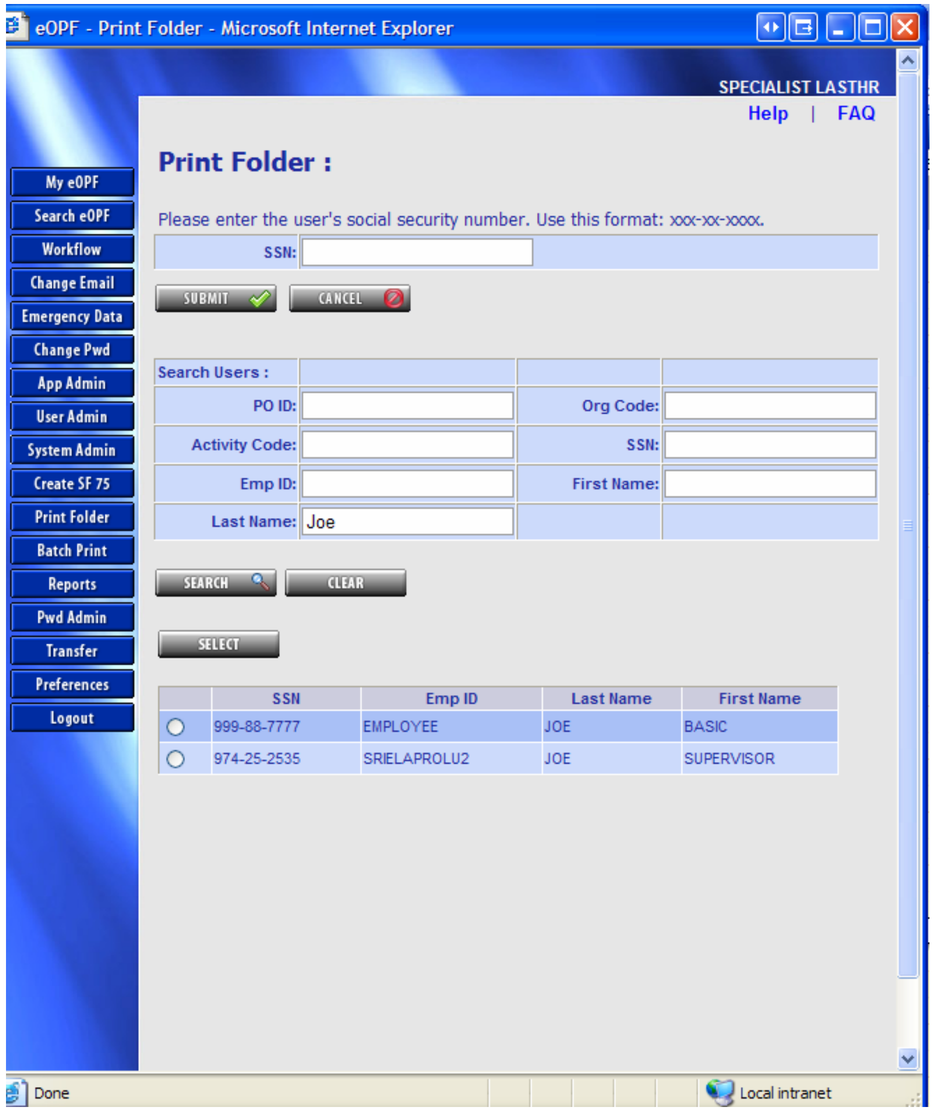
This figure shows the ***Print Folder*** page.



2. **Enter the SSN matching the folder you wish to print into the SSN field. If you only know the employee name, you may search for a SSN using the complete or partial employee name. Enter your search criteria into the name fields. Click the *Name Search* button and a list is displayed containing all matching names.**



3. **Click the Radio Button next to the desired name and click on the *Select* Button. This will populate the SSN field.**

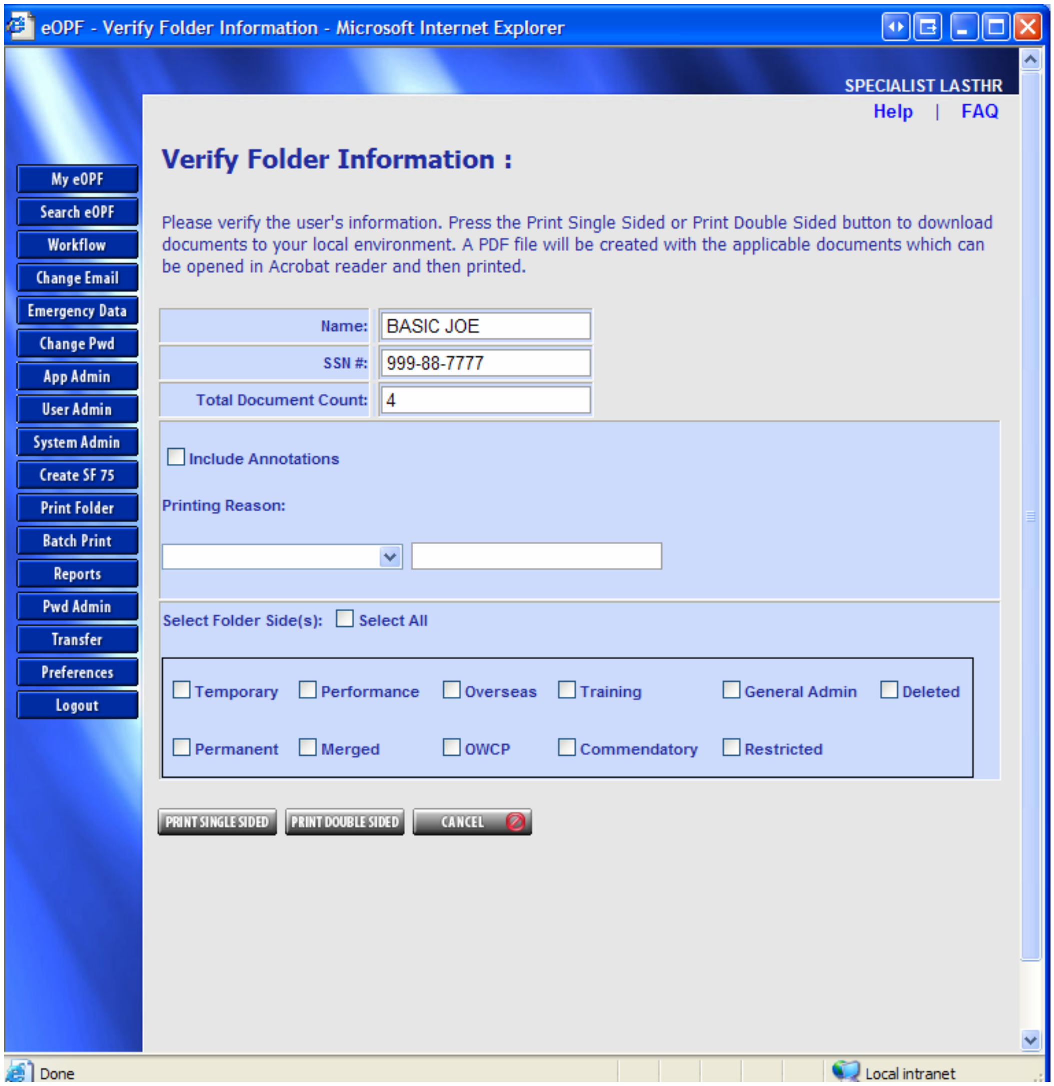


4. Click the 

Submit **button.**

The *Verify Folder Information* page opens. The *Include Annotations* box will be unchecked because the default is set to print without annotations.

This figure displays the ***Verify Folder Information*** page.



5. **Select the *Include Annotations* checkbox, if you want to print the documents with the annotations.**

6. **In the *Select Folder Side(s)* section, select the Folder(s) you want to print.**

7. **From the *Printing Reason* drop-down list, select a reason for printing the folder.**

8. **Click either the** 

Print Double Sided **or the** 

Print Single Sided **button, which will begin the assembly process to download the documents to your workstation.**
   Using the *Print Double Sided* button causes the application to ensure documents are properly separated for printing on a duplex printer.

Note:

If you select ***Print Double Sided*** mode, make sure that the printer selected is capable of performing duplex printing.

9. **From Adobe Reader you can print the folder contents by clicking the *Print* button.**

10. **Click the  Close button to close out of the Adobe Reader.**

Printing Directly from a Search Results Page

When you elect to show all documents after performing a search, you see a list of the documents matching your search criteria. A column in the result list indicates if the original document was single sided or double sided. You have the option of printing one or more documents directly from this ***Show All Documents*** page, if desired.

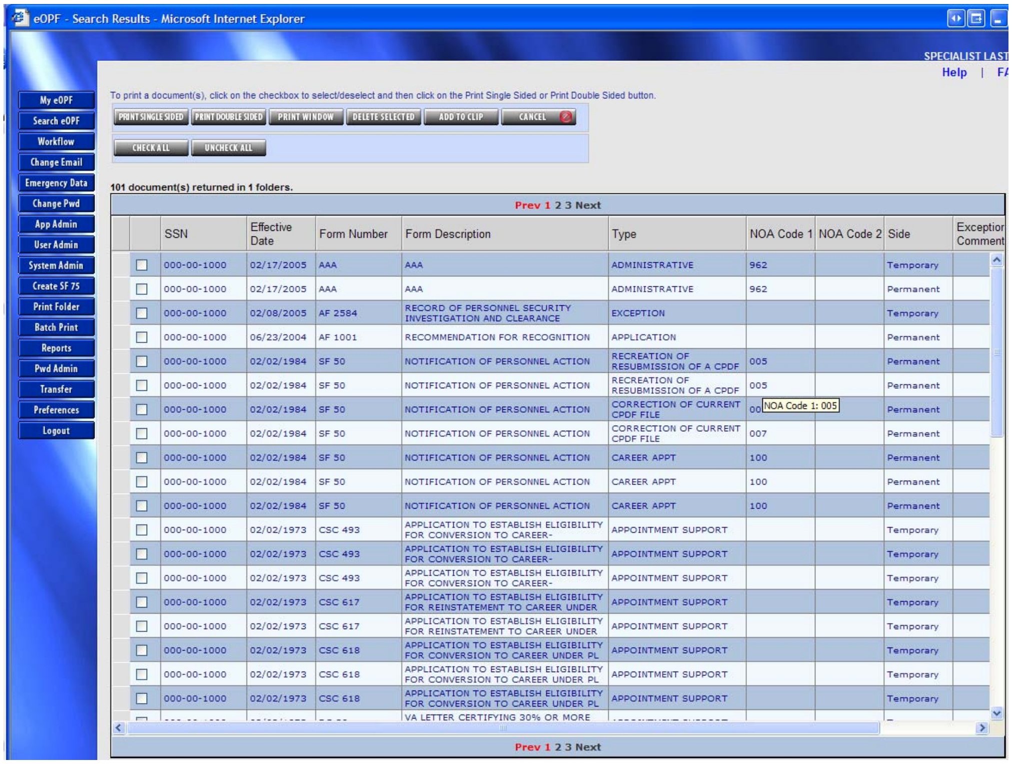
To Print Directly from a Search Results Page:

1. **Perform a search for documents using your desired criteria.**
   The *Folder* page displays.

2. **From the *Search Results* page, click the  *Show All Docs* button.**

   The *Show All Documents* page appears.

This figure displays the ***Show All Documents*** page.



3. **Select the desired document(s) using the corresponding checkbox. Click the *Check All* button to select all documents.**

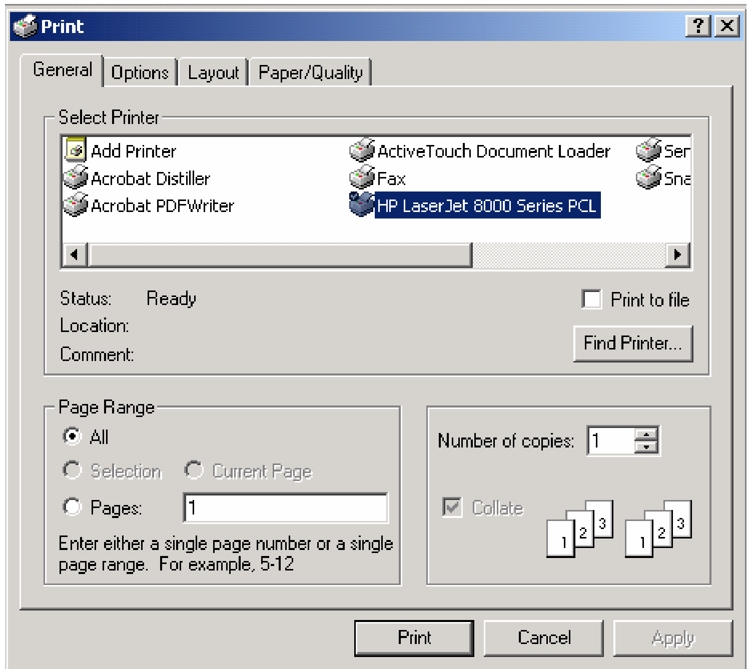
4. **Click either the** 

***Print Double Sided* button or the** 

***Print Singe Sided* button.**
Using the *Print Double Sided* button causes the application to ensure documents are properly separated for printing on a duplex printer. The document(s) are merged into a single PDF file that is displayed in your PDF viewer.

5. **Click the *Print* button located in the PDF viewer.**
The *Print* pop-up box appears.

The following figure displays the ***Print*** pop-up box.



6. Ensure that your printer settings are correct.
Remember to select double sided printing if you downloaded file as double sided from eOPF into the PDF viewer.

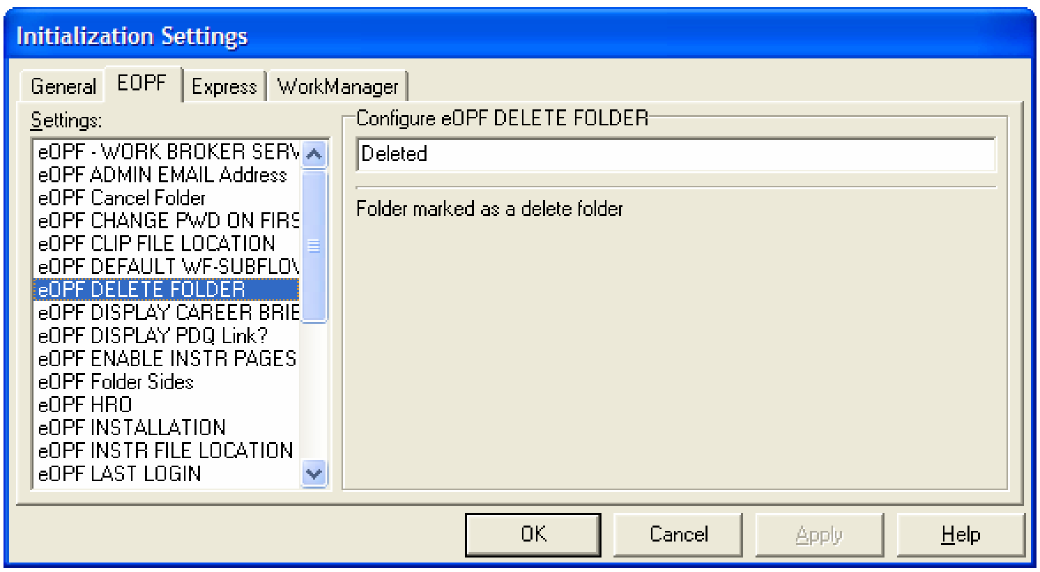
7. Click the 

OK **button.**
The PDF file is printed from the Adobe Viewer to the identified printer.

Chapter 7: Removing Documents and Pages

eOPF provides functionality to allow HR staff members to remove documents or single pages from an employee's folder. When documents are deleted they are moved to a specific folder side that is designated as containing deleted documents. Only approved users may access documents in this folder side and permanently purge the documents from the eOPF repository.

An Administrator will use e.POWER WorkPlace Manager to open the eOPF configuration tab and designate the folder side that will contain deleted documents when eOPF is installed for the agency. This setting is specific to the eOPF agency instance. Agency A may have the same or different folder set as containing deleted documents than Agency B.



Once this 'DELETED' Folder side is set, the folder side cannot be removed using Folder Side administration in the eOPF Administration Additional Config Tab. This folder side is now the destination for documents deleted by eOPF delete actions. This side is also listed on the Modify Index page if the user has access to the folder side.

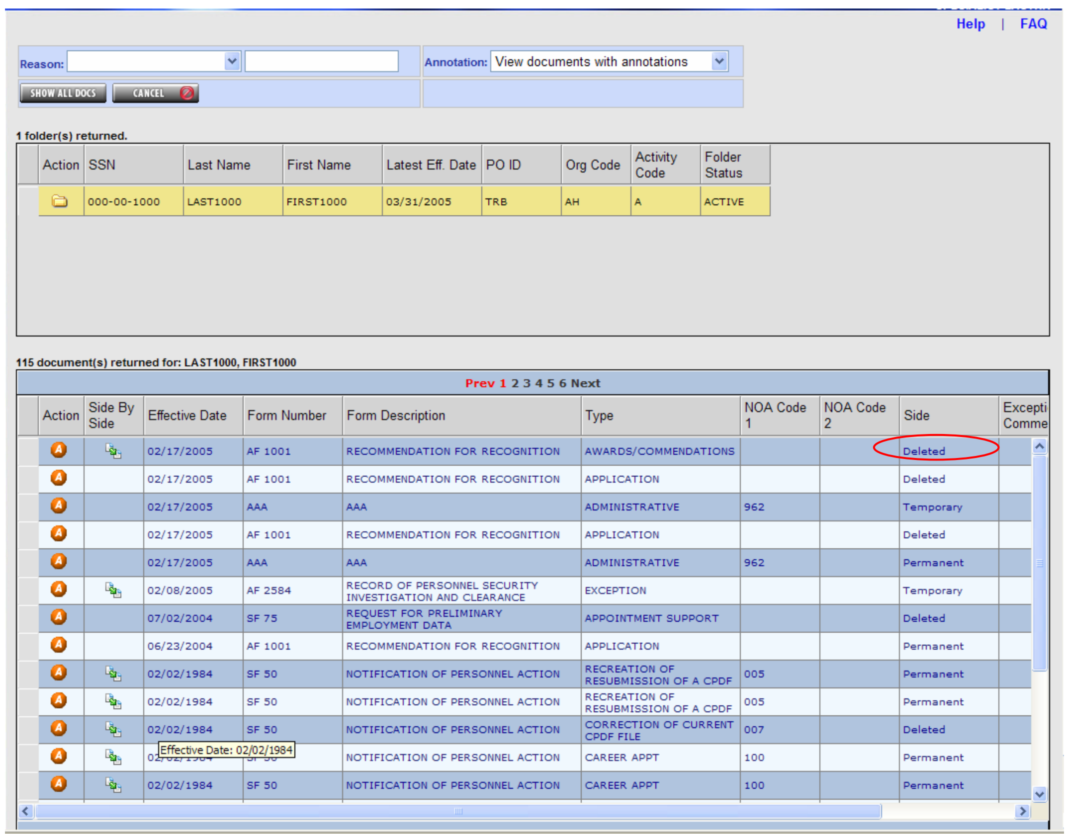
A dedicated Folder Side possibly called 'DELETED' will be used like a recycle bin. Any time a document is deleted it is placed in the 'DELETED' folder side. Access to the 'DELETED' folder side will work like all other folder sides. Folder Side access is assigned by user group by the eOPF Administrator. If you do not have access, then it is NOT displayed in the Folder Side list found on eOPF web pages.

Those that do have access to the Folder Side 'DELETED' will be able to listed documents found in the Folder Side 'DELETED'.

Note:

Moving a document to the ‘DELETED’ folder side does not remove the document from any paper clips or delete associated annotations.

Scenario: Document Deleted by user from search results web page:



When listing the documents in a folder based on a search that includes the documents found in the ‘DELETED’ folder side, multiple events can occur for a specific document.

1. If the document already has been placed in the Folder Side 'DELETED' and the user has ‘Purge’ privileges then the Action popup menu will enable the ‘Purge’ action. When ‘Purge’ is selected, the document and anything associated to the document (annotations, paper clip entries) are permanently purged from the system. The user is prompted to confirm the purge.

2. If the document’s current Folder Side is not 'DELETED' then the ‘Purge’ action is disabled and the user may only ‘Delete’ the

document. Deleting the document causes it to be moved into the Folder Side assigned as the 'DELETED' folder side. This gives the HR SPECIALIST with privileges to access the Folder Side 'DELETED' a chance to restore the document if deleted by mistake.

Scenario: Remove document from ‘DELETED’ folder side:
To remove a document from the ‘DELETED’ side one of two actions can occur:

1. The user may select the purge action to permanently delete the document. The user will be prompted to confirm permanent deletion. This deletion includes any annotations or paper clips associated to the document.

2. The user may select the modify document index action to place the document in to a different folder side thus removing from the ‘DELETED’ side.

Scenario: Document(s) deleted from Show All Documents web page – Delete Selected:

From the Show All Docs web page, a HR Specialist may select one or more documents and select the ‘Delete Selected’ button. This action has one of two consequences for the selected document(s).

1. If the document already has been placed in the Folder Side 'DELETED' the document is permanently purged from the system after user

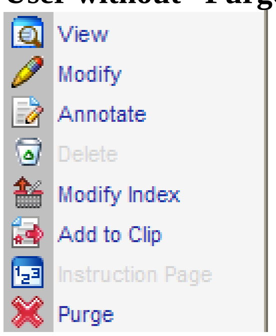
confirmation. Confirmation will be asked only once even if multiple documents are selected that will be purged.

2. If the document does not exist in the Folder Side 'DELETED' it is moved into the Folder Side 'DELETED'. This gives the HR SPECIALIST with privileges to access the Folder Side 'DELETED' a chance to restore the document if deleted by mistake.

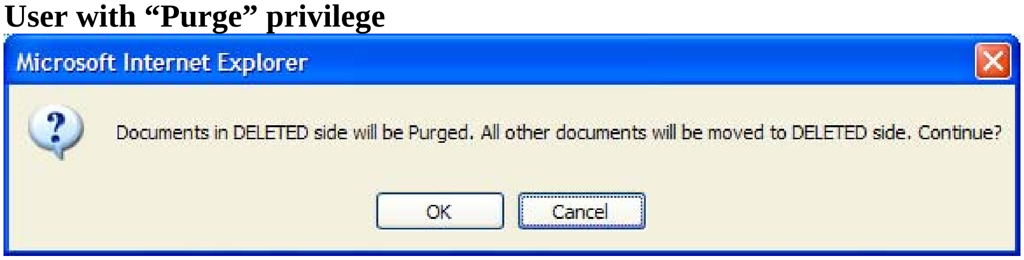
PURGE Security:
Users who need the purge privilege must be assigned to "eOPF_PURGE" group, using User Administration from the eOPF Administration interface.

Following are prompts that user would receive when trying to delete documents from "Show All Documents" & "Search Results" page:

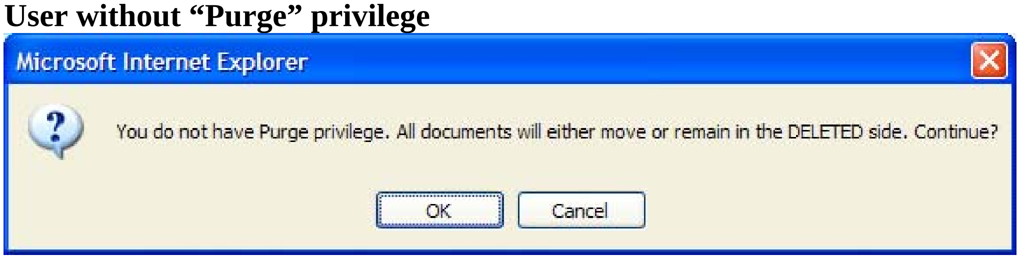
Search Results:
User without "Purge" privilege



Show All Docs:
User with "Purge" privilege



User without "Purge" privilege



Audit Trails/Reports:
Both the delete and purge actions will be captured in audit trail information. Each action will record the User, date/time of action, type of action, and information about the document. Two reports will be provided. One report will provide a list of documents assigned to the 'DELETED' folder side and by whom. The second report will list documents purged and by whom. Each report will provide a filter by date range, SSN of person performing activity and SSN of the person against which the activity is performed. The search criteria will be identical to the existing Documents Viewed Report search criteria.

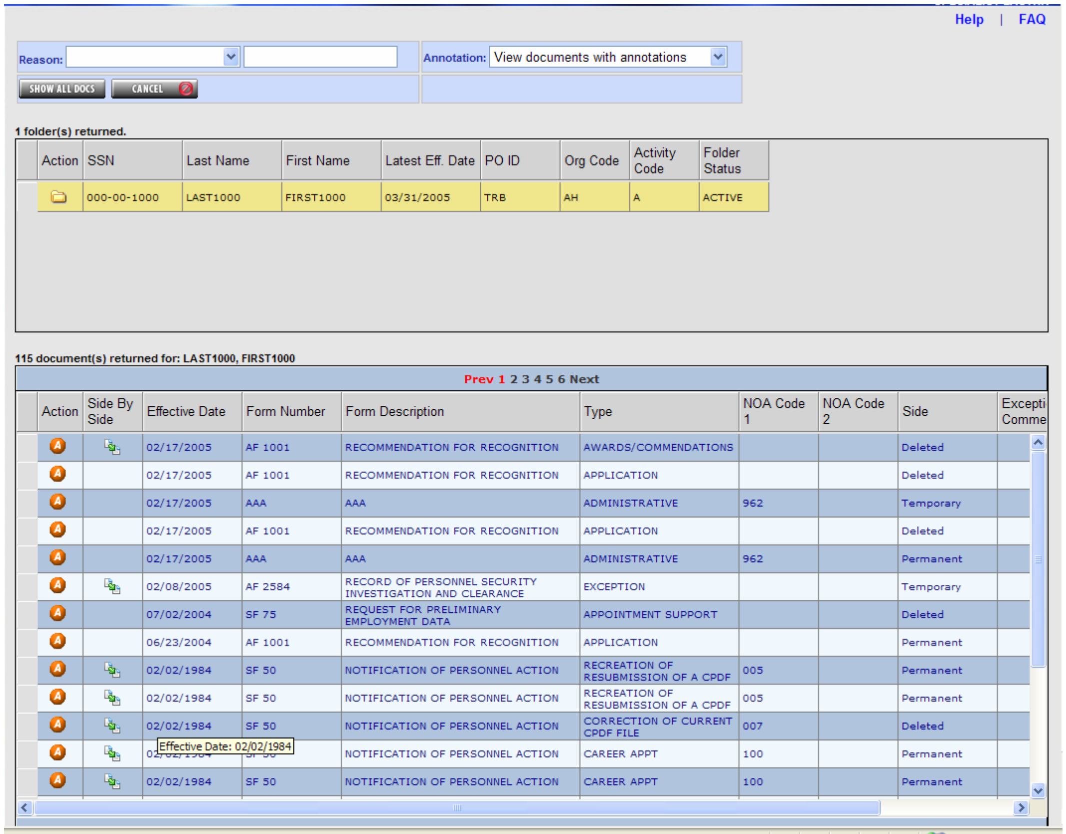
Deleting an eOPF Document

eOPF allows HR personnel to delete eOPF documents. eOPF provides a method for the eOPF administrator to restrict this delete functionality to a select group within the HR staff. When a document is selected for deletion it is move to the 'DELETED' folder side where it can be permanently purged or recovered after review. If the search included documents from the 'DELETED' folder side and the user selects to delete a document from the 'DELETED' folder side it is then purged. The ability to purge a document is managed by the eOPF Administrator.

To Delete an eOPF Document:

1. **Search for and locate the eOPF document you wish to remove.**
   The ***Search Results*** page displays.

The following figure shows the ***Search Results*** page.

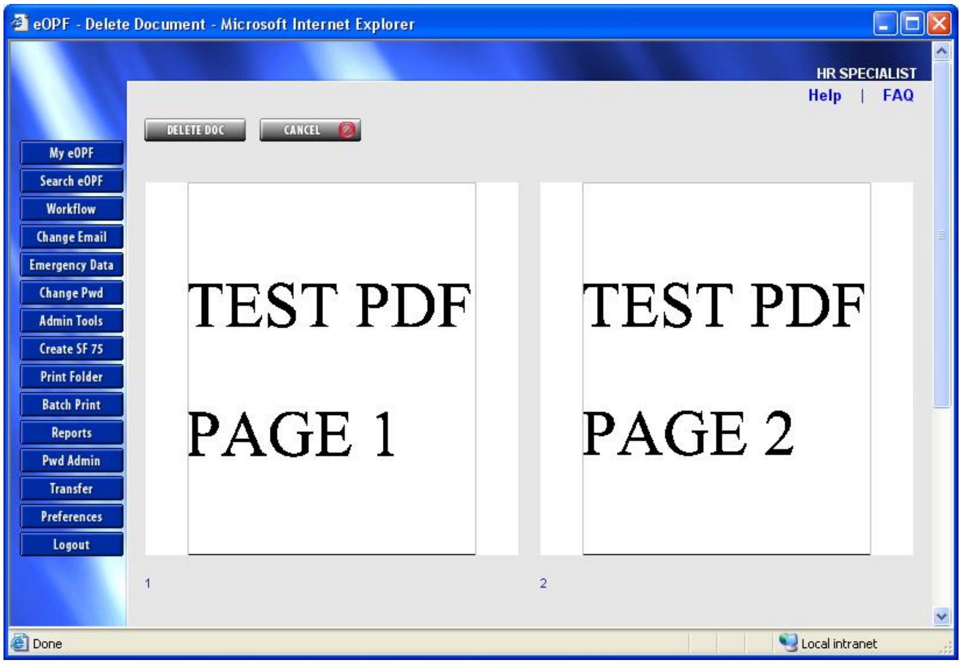


2. **From the *Search Results* page, enter a *Reason* code for deleting the document.**

3. **Delete a document by clicking the *Action* icon of the corresponding to the document you want to delete and select the Delete *Delete* option.**

The page refreshes with a view of the document you've chosen to delete. You can expand any page for a close-up examination of the page(s) before you decide to delete.

The following figure shows a document marked for deletion.



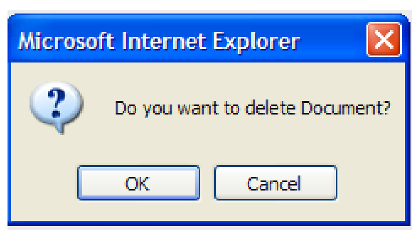
4. Click 

***Delete Doc* button.**

A delete confirmation pop-up box appears. (If you do not wish to delete, click 

Cancel button.)

The following graphic displays the delete confirmation pop-up box.



5. Click 

***OK* button.**

The ***Search Results*** page reappears with the deleted document no longer listed. The document is now located in the ‘DELETED’ folder side.

Deleting a Page from an eOPF Document

Deleting a page from an eOPF document means that it will be permanently removed from the system. Therefore, it is critical that this decision be carefully evaluated before removing a page. Deleting a page is reserved for instances when a page was erroneously entered in eOPF.

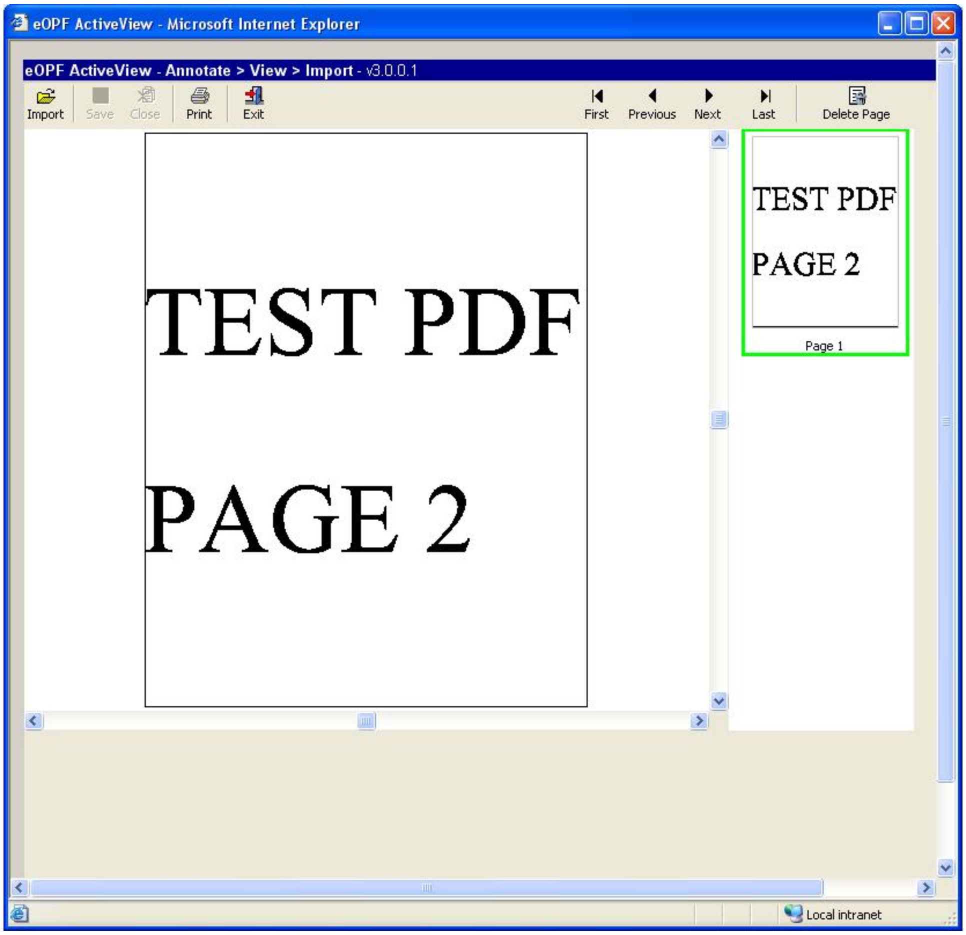
Note:

Removing a page only removes that individual page, not the entire document. If a document only contains one page, you cannot use this function; instead use ***Delete Document***. Index information and other associated data remains in eOPF with the document, even when the specified page is removed.

To Delete a Page from an eOPF Document:

1. **Search for and locate the eOPF document from which you wish to remove a page.**
   The ***Search Results*** page displays.

2. **Modify a document by clicking the *Action* icon of the corresponding to the document you want to modify and select the Modify option.**
   The ***ActiveView*** page appears.



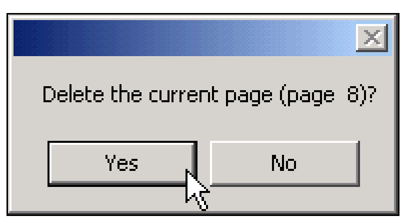
Note:

The only modification of the document being done is the deletion of pages. No data on the document can be modified.

---

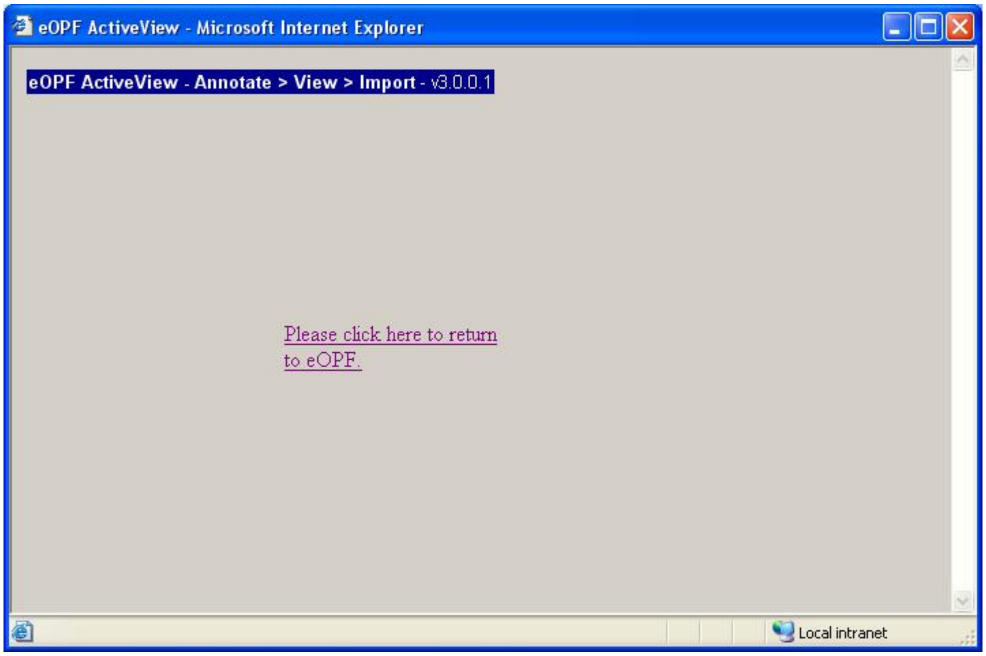
3. **Navigate to the page you wish to delete, and then click the** 

***Delete Page* button.**
   A delete confirmation box appears.



4. **Click the *Yes* button.**
   The page is removed and the display is refreshed in the eOPF Active View window.

5. **Click *Exit*.**
   This returns you to the 'Please click here to return to eOPF' prompt. Click on the link to return to your start result page.



Deleting/Purging a Group of eOPF Documents

eOPF allows HR personnel to delete multiple eOPF documents simultaneously. eOPF provides a tool for the eOPF administrator to restrict this delete functionality to selected groups. When you delete multiple documents they are moved to the 'DELETED' folder side to await review for permanent purging from the eOPF repository.

From the ***Show All Docs*** page, a HR Specialist may select one or more documents and select the 'Delete Selected' button. This action has one of two consequences for the selected document(s).

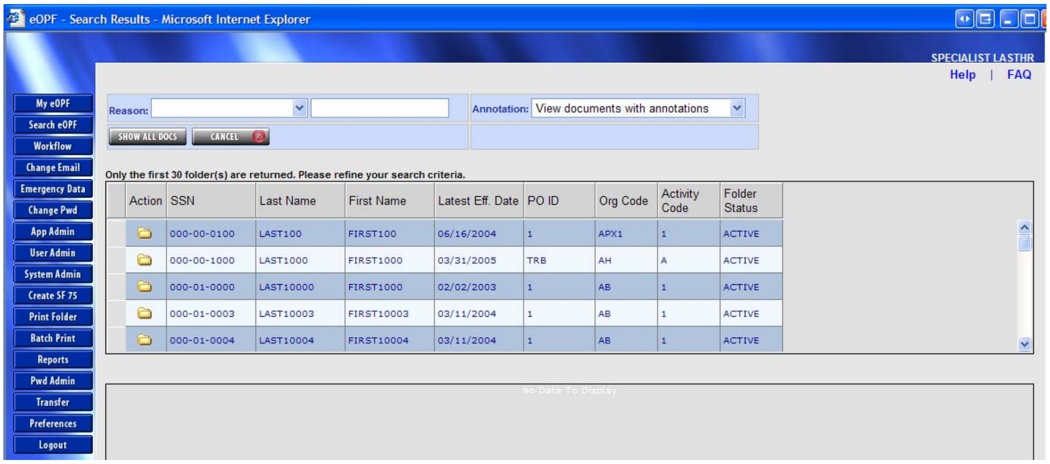
1. If the document already has been placed in the Folder Side 'DELETED' the document is permanently purged from the system after user confirmation. Confirmation will be asked only once even if multiple documents are selected that will be purged.

2. If the document does not exist in the Folder Side 'DELETED' it is moved into the Folder Side 'DELETED'. This gives the HR SPECIALIST with privileges to access the Folder Side 'DELETED' a chance to restore the document if deleted by mistake.

To Delete Multiple eOPF Documents:

1. Search for and locate the eOPF(s) from which you want to remove documents.
The *Folder* page appears listing eOPF(s).

The following figure displays the ***Folder*** page.



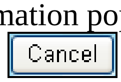
2. Click the  ***Show All Docs* button.**
The *Show All Documents* page appears.

The following figure displays the ***Show All Documents*** page.

3. Check the documents you want to delete by clicking on the check box located next to each document listed.

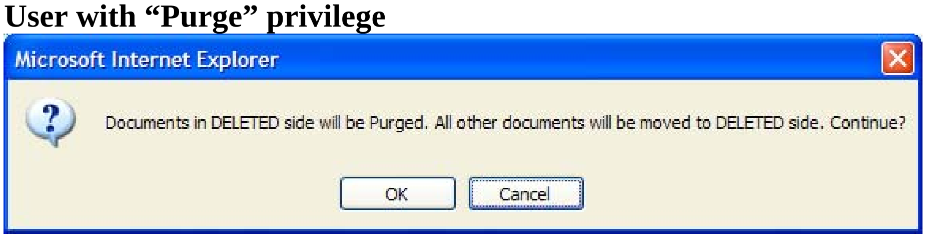
Click the ***Check All*** button to select all documents.

4. Click the  ***Delete Selected*** **button.**

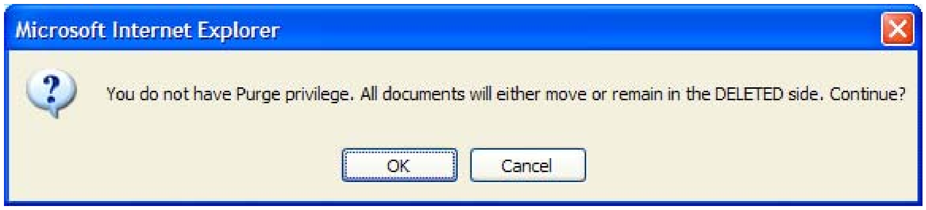
A delete confirmation pop-up box appears. (If you do not wish to delete, click the  ***Cancel*** button.)

If the search performed included documents found in the 'DELETED' folder side and you select one of these documents to delete you will receive one of the following prompts depending on your purge privilege setting.

Show All Docs:
User with "Purge" privilege



User without "Purge" privilege



5. **Click the**  ***OK*** **button.**
   The documents that were checked are permanently deleted if from the 'DELETED' folder side or moved to the 'DELETED' folder side. The ***Show All Documents*** page reappears with the deleted document(s) no longer listed.

Purging an eOPF Document

eOPF allows HR personnel to purge eOPF documents that have been placed in the eOPF 'DELETED' folder side. Both access to the 'DELETED' folder side and the ability to purge a document are managed through security. The search must included documents from the 'DELETED' folder side to allow for purging. The user must be a member of the eOPF_Purge group that has the ability to purge documents. The ability to purge a document is managed by the eOPF Administrator.

Scenario: Remove document from 'DELETED' folder side:
To remove a document from the 'DELETED' side one of two actions can occur:

1. The user may select the delete action to permanently delete the document. The user will be prompted to confirm permanent deletion. This deletion includes any annotations or paper clips associated to the document.

2. The user may select the modify document index action to place the document in to a different folder side thus removing from the 'DELETED' side.

To Purge an eOPF Document:

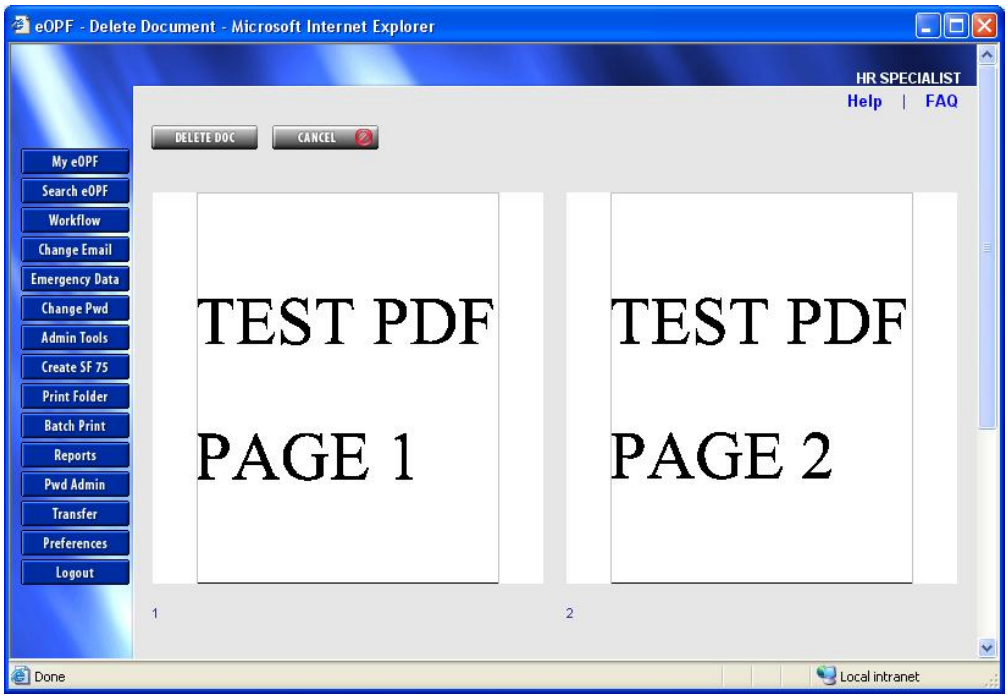
1. **Search for and locate the eOPF document you wish to permanently remove in the 'Deleted' folder side.**
   The ***Search Results*** page displays.

2. **From the *Search Results* page, enter a *Reason* code for purging the document.**

3. **Delete a document by clicking the *Action* icon of the corresponding to the document you want to delete and select the *Delete* option.**

   The page refreshes with a view of the document you've chosen to delete. You can expand any page for a close-up examination of the page(s) before you decide to delete.

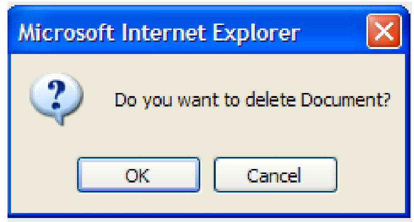
The following figure shows a document marked for deletion.



4. **Click *Delete Doc* button.**

   A delete confirmation pop-up box appears. (If you do not wish to delete, click ***Cancel*** button.)

The following button displays the delete confirmation pop-up box.



5. Click  ***OK* button.**

The ***Search Results*** page reappears with the deleted document no longer listed. The document is now purged from the eOPF repository.

Chapter 8: Modifying Document Indexes

You modify a document index when you want to move a document to a different folder or folder section or correct information required for the index.

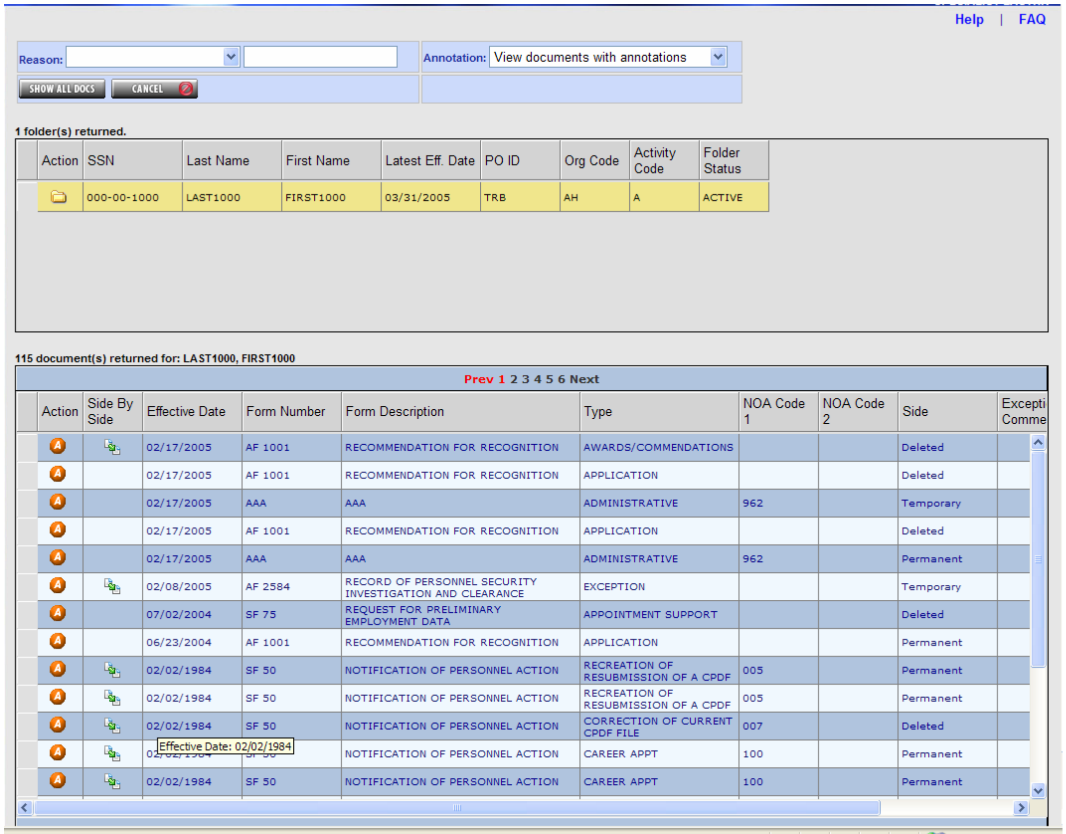
Correcting a Filing Error

This function is used to move a document to another folder.

To Correct a Filing Error:

1. **Search for and locate the eOPF document that you wish to move to a different folder.**
   The ***Search Results*** page displays.

The following figure displays the ***Search Results*** page.

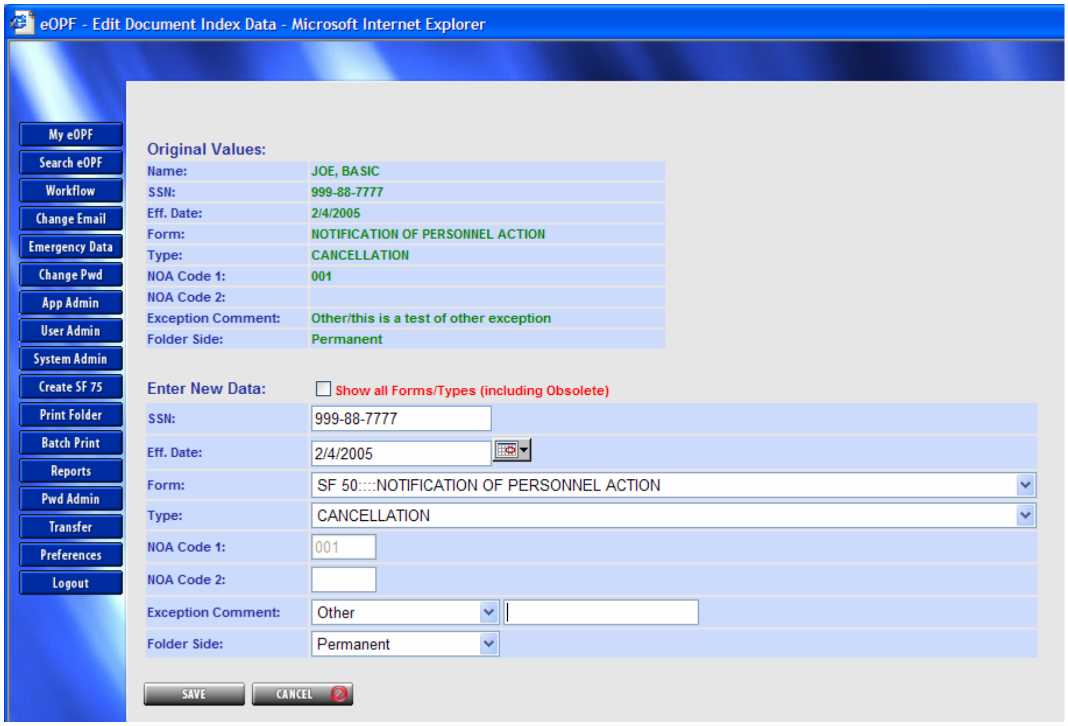


2. **From the *Search Results* page, select a reason from the *Reason* drop-down list.**

3. **Move a document by clicking the *Action* icon of the corresponding to the document you want to move and select the Modify Index option.**

   The Modify Document Index page appears.

The following page shows the ***Modify Document Index*** page.



4. **Type the correct employee's SSN in the *SSN* field, and then click the**  ***Save* button.**
   The ***Move Document*** confirmation box appears.

The following figure displays the ***Move Document*** confirmation box.

5. **Click the**  ***OK* button.**
   The ***Search Results*** page reappears with the document moved.

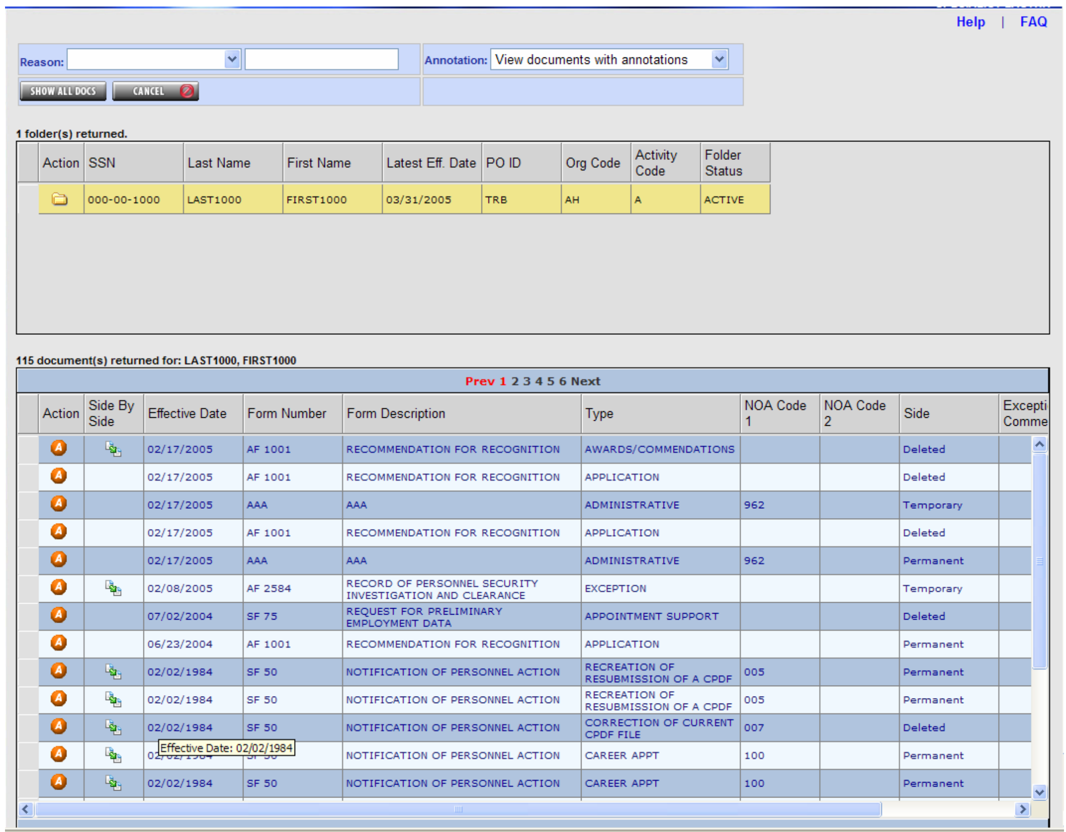
Moving Documents between Folder Sections

The HR user may move documents to different folder sections for an employee.

To Move a Document within an Employee's Folder:

1. **Search for and locate the eOPF document that you wish to move to a different section.**
   The ***Search Results*** page displays.

The following figure displays the ***Search Results*** page.

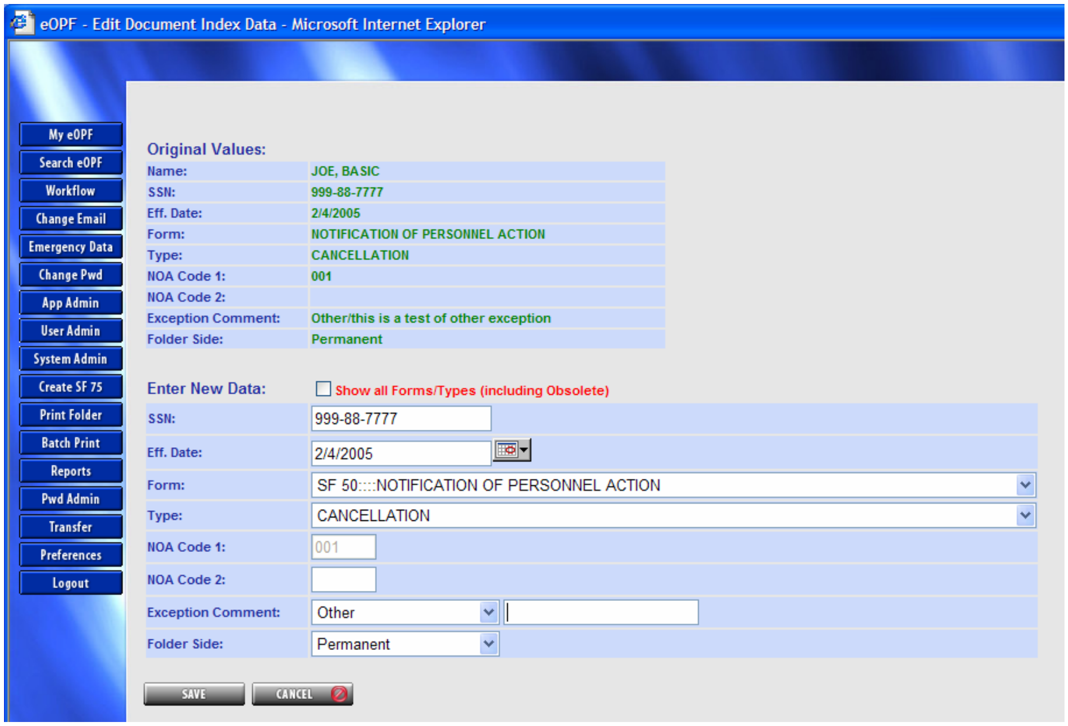


2. **From the *Search Results* page, select a reason from the *Reason* drop-down list.**

3. **Move a document by clicking the *Action* icon of the corresponding to the document you want to move and select the Modify Index option.**

   The Modify Document Index page appears.

The following figure displays the ***Modify Document Index*** page.



4. Select the desired *Folder Section* from the *Folder* drop-down list, and then click the 

***Save* button.**

The ***Search Results*** page reappears with the folder section changed.

Note:

You must first have a NOA Code value to enter and save a NOA Code 2 value on any document when using the modify index feature.

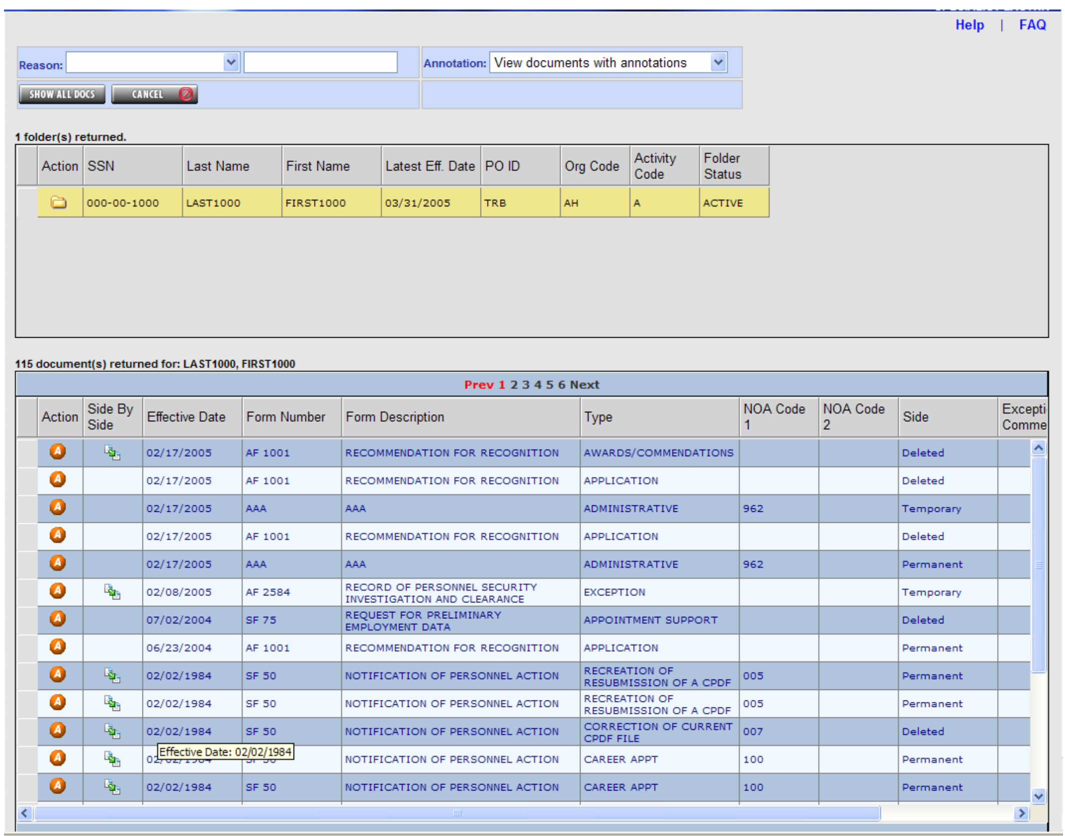
Modifying Document Index Information

At times users will need to change the index information of a document for accuracy. For example, if a mistake was made with the indexing when a newly scanned document was entered into eOPF, users can correct it with this option.

To Correct an Inaccurate Document Index:

1. **Search for and locate the eOPF document that you wish to move to a different section.**
   The ***Search Results*** page displays.

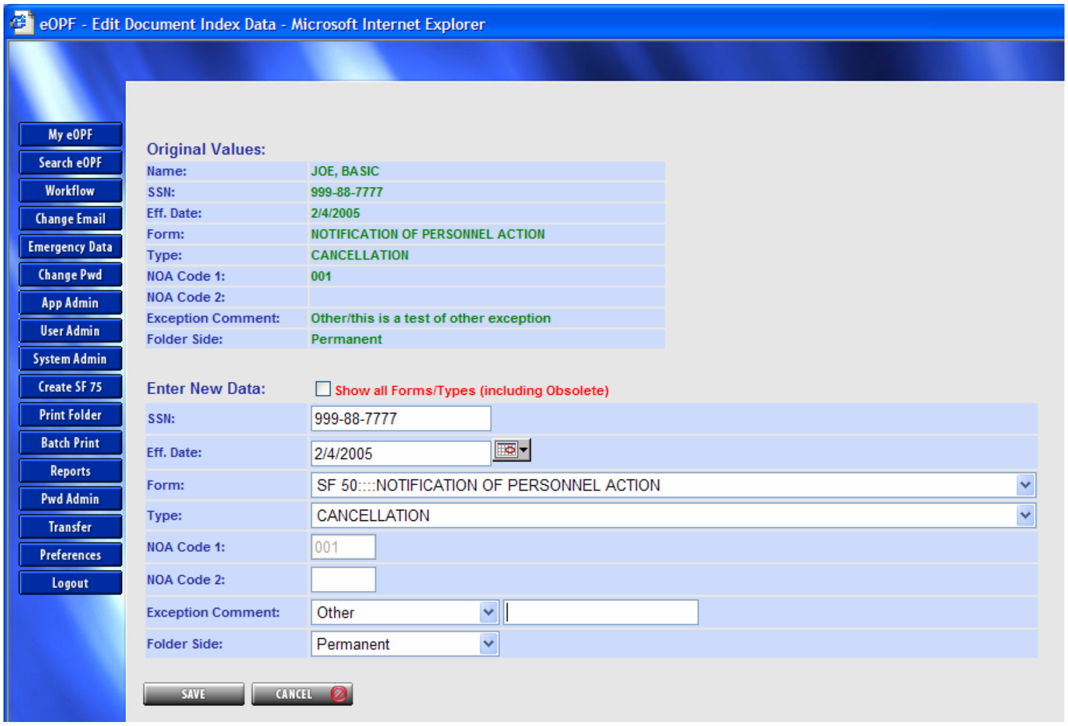
   The following figure displays the ***Search Results*** page.



2. **Select a reason from the *Reason* drop-down list.**

3. **Move a document by clicking the *Action* icon of the corresponding to the document you want to move and select the Modify Index option.**

The following figure shows the ***Modify Document Index*** page.



4. Modify the desired index information, i.e., Effective Date, Form Name, Form Type, Print, and then click the 

***Save* button.**

The ***Search Results*** page reappears and the Index Information is changed.

Note:

You must first have a NOA Code value to enter and save a NOA Code 2 value on any document when using the modify index feature.

Chapter 9: Working with Folders

Employee OPF documents can be accessed from a *Search Results* and ***Show All Documents*** pages or through the use of paper clips. In eOPF, paper clips are virtual associations that allow the HR staff member to view related documents from an employee's folder.

Working with Search Results Pages

When you elect to show all documents after performing a search, you see a list of the documents matching your search criteria. A column in the result list indicates if the original document was single sided or double sided. You can print your search Search Results or print a document(s) from the list.

Printing Your Search Search Results

eOPF users have the ability to print a copy of the search results on the ***Show All Documents*** page, if desired.

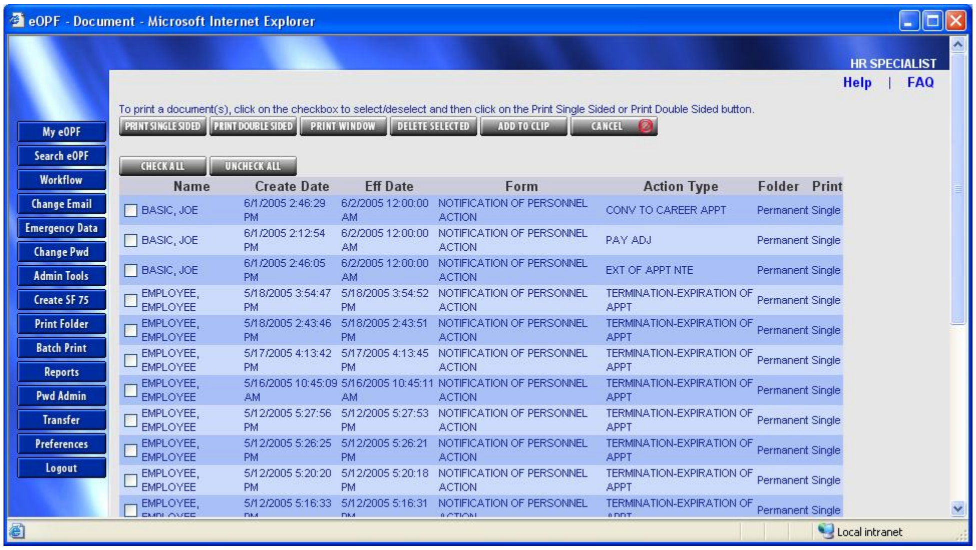
To Print a Search Results from the *Show All Documents* Page:

1. **Perform a search for documents using your desired criteria.**
   The ***Search Results*** page displays.

2. **From the *Search Results* page, click the** 

   ***Show All Docs* button.**
   The ***Show All Documents*** page appears.

The following figure displays the ***Show All Documents*** page.



3. **Click the *Print Window* button.**
   Your search Search Results prints.

Printing Directly from a Search Results Page

When performing various searches, eOPF generates search results in the form of lists of documents called *Search Results* and *Show All Documents* pages. You have the option of printing one or more documents directly from these pages, if desired.

To Print Directly from a Search Results Page:

1. **Perform a search for documents using your desired criteria.**

2. **Click the** 

 ***Show All Docs* button.**
   The ***Show All Documents*** page appears listing all document that match your search criteria. If you only want to list a single folders document select the Show All Docs menu item for the folder using the popup menu of the folder.

The following figure shows the ***Show All Documents*** page.

3. **Select the desired document(s) using the corresponding checkbox.**
 Click the *Check All* button to select all documents.

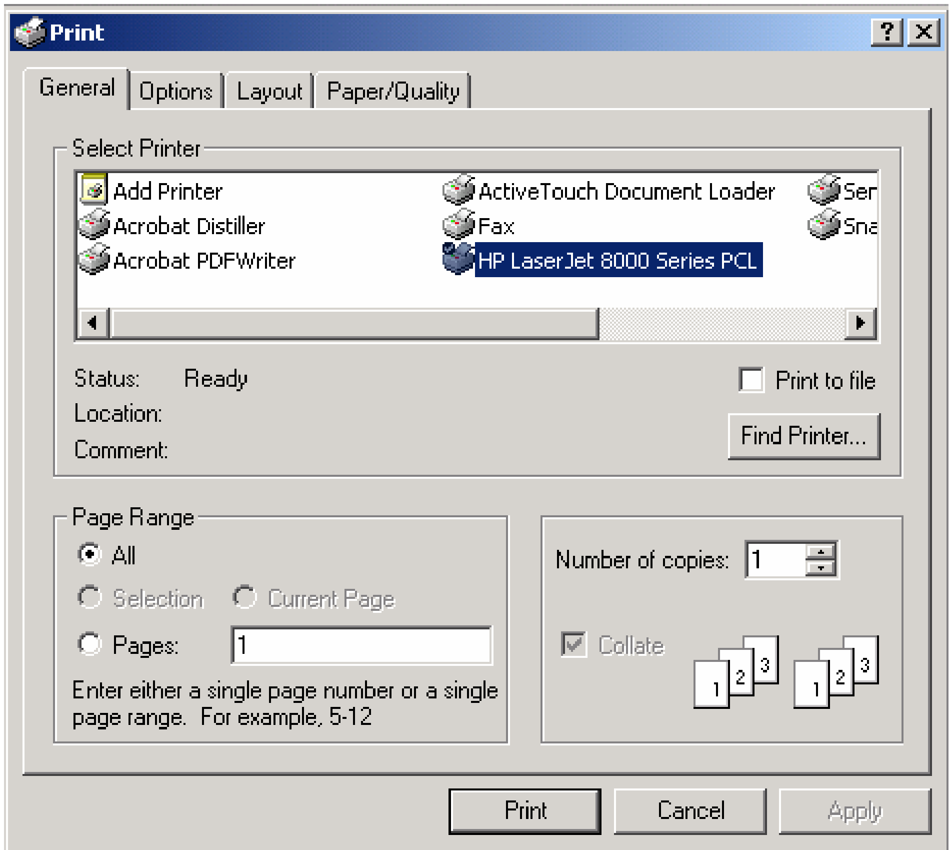
4. **Click either the** 

***Print Double Sided* button or the** 

***Print Single Sided* button.**
The document(s) are merged into a single PDF file that is displayed in your PDF viewer.

5. **Click the *Print* button located in the PDF viewer.**
The *Print* pop-up box appears.

The following figure displays the ***Print*** pop-up box.



6. Ensure that your printer settings are correct.
Remember to select double sided printing if you selected the 

Print Double Sided button on the ***Show All Documents*** page.

7. Click the 

OK **button.**
The PDF file is printed from the Adobe Viewer to the identified printer.

Working with Paper Clips

eOPF provides you the ability to paper clip documents from the same folder together. These paper clips are actually associations that allow you to view groupings of documents. eOPF paper clipping allows you to select individual pages within a document or entire documents for clipping.

Each folder can have an unlimited number of paper clips. For maximum usability, we recommend that you paper clip documents by meaningful association, such as change in tenure group or pay increases.

A paper clip can be classified as public or private, the system defaults to public. Either the paper clip owner, a member of the administration users group, or and HR Specialist that manages the folder can reassign private paper clips as public paper clips.

If a document that had been paper clipped to other documents is deleted from the eOPF, the paper clip will remain intact (with the other clipped documents), minus the newly deleted document.

Creating a Paper Clip

The first step in using the paper clip is creating a new paper clip for a folder.

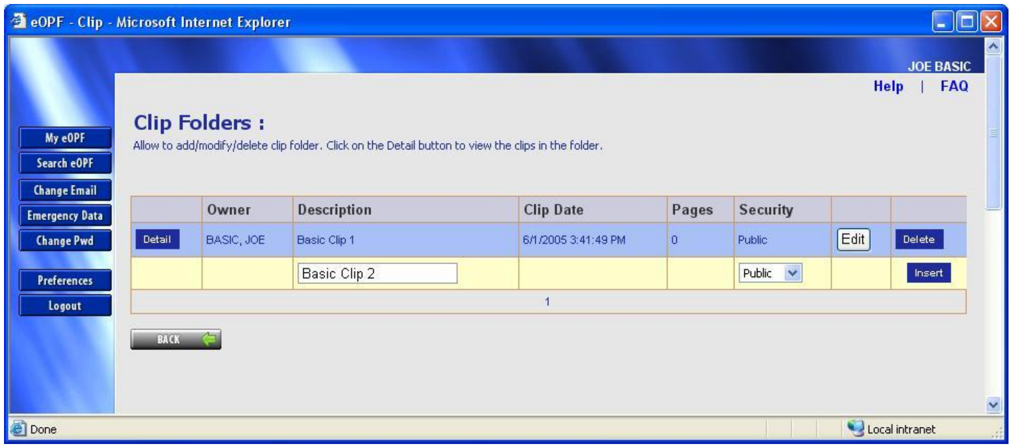
To Create a New Paper Clip for a Folder:

1. **Perform a search for the desired folder(s) using the *Search* page.**
   The ***Search Results*** page displays.

2. **Click on the  *Folder Action* icon and select the  *Clip Folder* option to open the Clip Folders page of this folder.**

The *Clip Folders* page opens.

This figure displays the ***Clip Folders*** page.



4. **Enter a description for the paper clip in the *Description* field.**
   For maximum usability, try to be as specific and descriptive as possible.

5. **In the *Security* field, select either *Public* or *Private* based on your needs.**

6. **Click the** 

 ***Insert* button.**

7. **Click the** 

 ***Back* button to return to the search result list.**

Note:

A paper clip is classified as ***public*** or ***private***. Any user accessing the selected folder can view a public paper clip; however, ONLY the user that created the paper clip, a member of the administration users group, or an HR Specialist that manages the folder can view a private paper clip.

Adding Documents to a Paper Clip

Once a folder has a paper clip, users can add documents to the paper clip at any time.

To Add Documents to a Paper Clip:

1. **Search for the document within the folder you wish to paper clip.**
   The ***Search Results*** page displays.

2. **If this is not your own folder then you must select the reason for accessing a document from the *Reason* drop-down list.**

3. **Clicking the  *Action* icon corresponding to the document you want to create a clip folder in and select the **

option

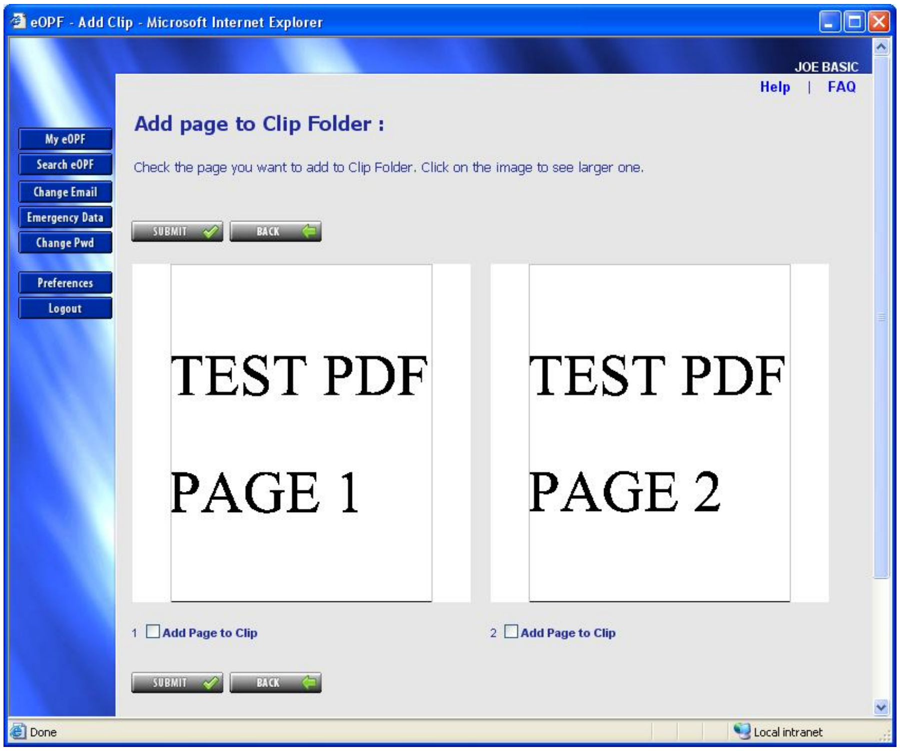
   The following figure displays the ***Add Clip to Clip Folder*** page.

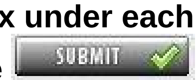
4. **Click the **

***Select* button to add the clip to the clip folder.**

   The Add Page to Clip Folder page appears.

The following figure displays the ***Add Page to Clip Folder*** page.



5. **Select the additional pages you want to add to the clip by checking the *Add Page to Clip* checkbox under each page you want in the paper clip, and click the** 

Submit button.
   The ***Search Results*** page reappears.

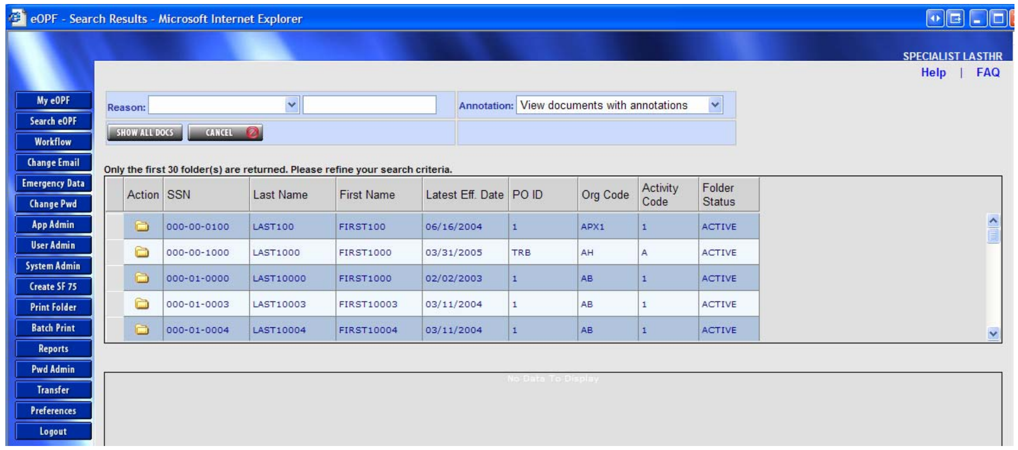
Note:
Click the ***Back*** button to return to the previous page.

Note:
A paper clip is classified as ***public*** or ***private***. Any user accessing the selected folder can view a public paper clip; however, ONLY the user that created the paper clip, a member of the administration users group, or an HR Specialist that manages the folder can view a private paper clip.

To Add Documents to a Paper Clip from Show All Docs page:

1. **Search for and locate the eOPF(s) from which you want to add documents to a clip folder.**
   The ***Search Results*** page appears listing eOPF(s).

The following figure displays the ***Search Results*** page.

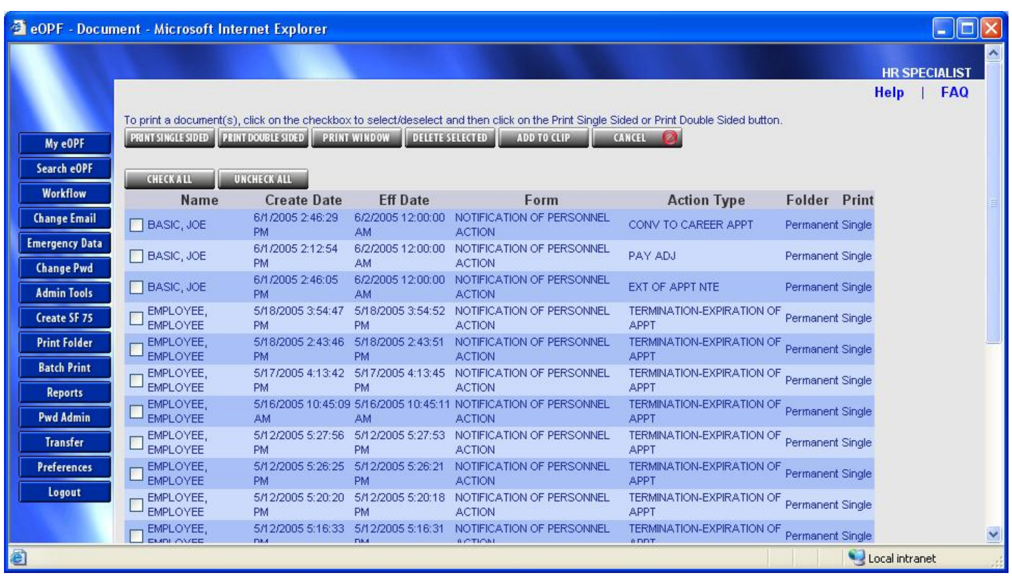


.

2. **If this is not your own folder then you must select the reason for accessing a document from the *Reason* drop-down list.**

3. **From the *Search Results* page, click the**  ***Show All Docs* button.**
   The ***Show All Documents*** page appears containing only the documents that meet the search criteria.

The following figure displays the ***Show All Docs*** page.



4. **Using the *Show All Docs* page, select the documents you want to add to a clip folder. All selected documents must belong to the same employee folder. You will be warned if**

you select documents from multiple employee folders. Click the *Add to Clip* button, which opens the *Add Clip to Clip Folder* page.

The following figure displays the ***Add Clip to Clip Folder*** page.

5. Click the 

***Select* button to add the documents to the clip folder.**

The entire set of selected documents is added to the selected clip folder and a confirmation page is displayed.

The following figure displays the ***Confirmation message*** page.

6. Select the *OK* button.

The ***Search Results*** page reappears.

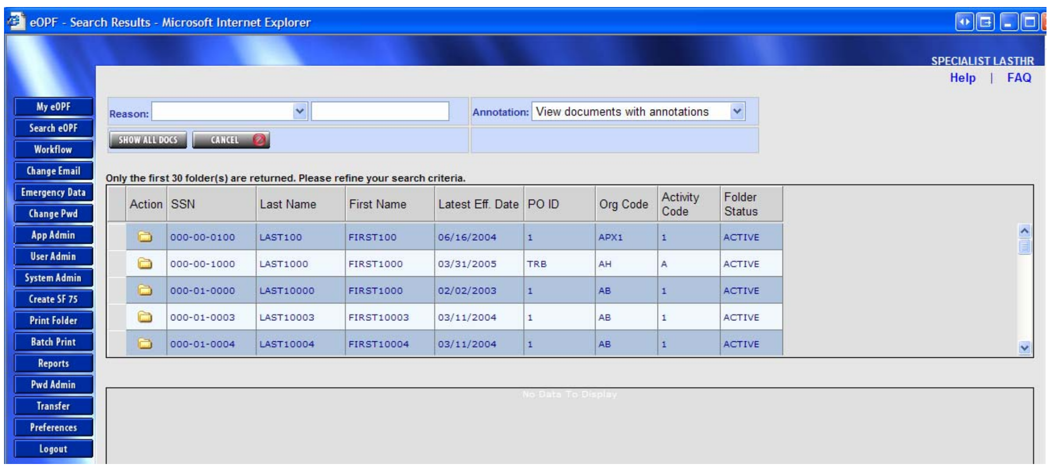
Viewing Documents within a Paper Clip

Once a paper clip has been created and populated with associated documents, you can view a list of the documents associated with that clip and open those individual documents.

To View Documents Contained within a Paper Clip:

1. **Perform a search for the desired folder(s) using the *Search* page.**
   The ***Search Results*** page displays.

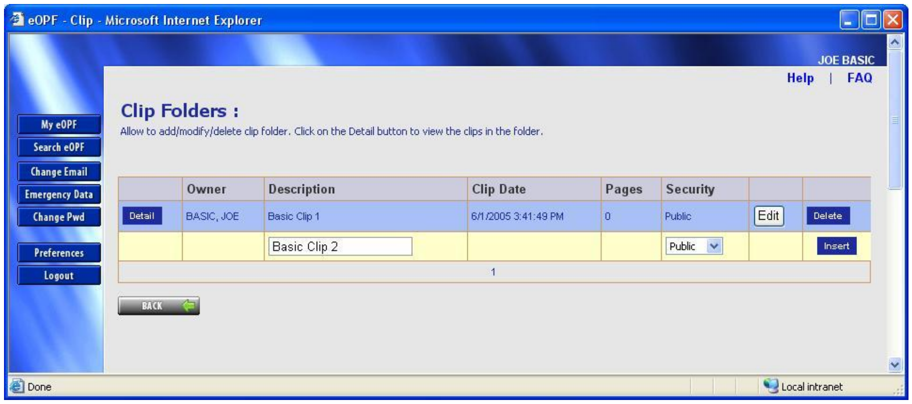
   The following figure displays the ***Search Results*** page.



2. **From the *Search Results* page, select the reason for accessing the document from the *Reason* drop-down list.**

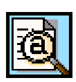
3. **Click on the *Folder Action* icon and select the Clip Folder *Clip Folder* option to show the *Clip Folders* page for this folder.**

This figure displays the ***Clip Folders*** page.



4. **Click the**  ***Detail*** **button next to the desired paper clip.**
   The ***View Clip Folder*** page appears.

This figure displays the ***View Clip Folder*** page.

5. **Click the**  ***View Doc*** **icon to view the desired document within the clip.**
   The document appears.

Note:

A paper clip is classified as ***public*** or ***private***. Any user accessing the selected folder can view a public paper clip; however, ONLY the user that created the paper clip, a member of the administration users group, or an HR Specialist that manages the folder can view a private paper clip.

Removing a Document from a Paper Clip

As paper clips change over time, so may the need to modify the contents of a paper clip. In addition to being able to add documents to a paper clip at any time, you also have the option of removing them from the paper clip.

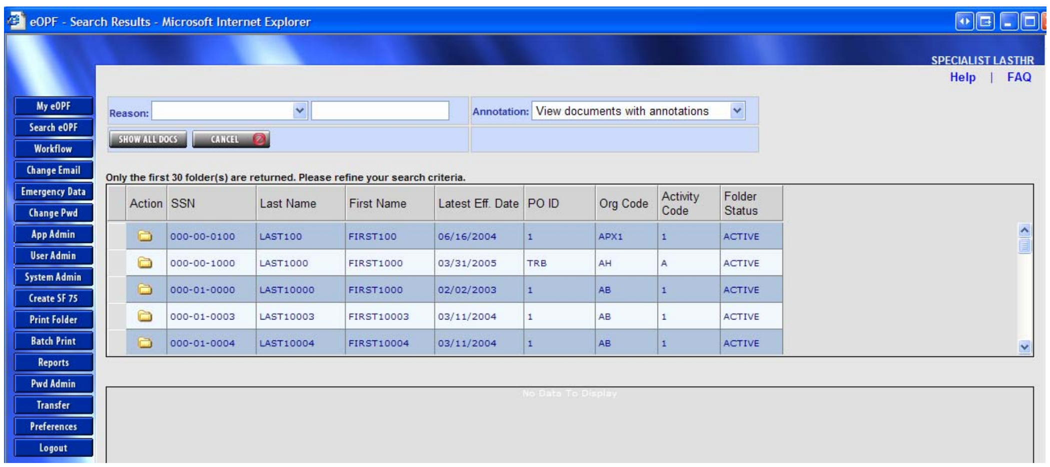
Note:

Removing a document from a paper clip does not remove the document from the system. Rather, it removes the association of the document with the other paper clipped documents.

To Remove a Document from a Paper Clip:

1. **Perform a search for the desired folder(s) using the *Search* page.**
   The ***Search Results*** page displays.

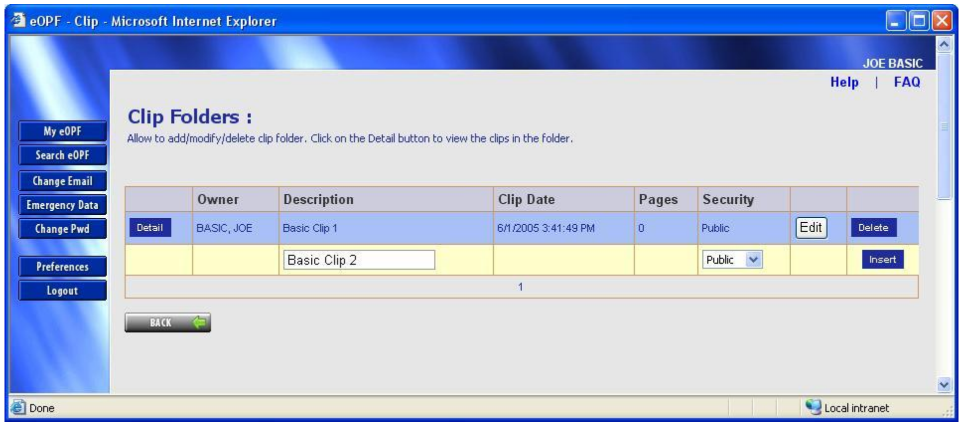
   The following figure displays the ***Search Results*** page.



2. **From the *Search Results* page, select the reason for accessing the document from the *Reason* drop-down list.**

3. **Click on the *Folder Action* icon and select the Clip Folder *Clip Folder* option to open the Clip Folders page of this folder.**
   The ***Clip Folders*** page appears.

This figure displays the ***Clip Folders*** page.



4. **Click the** 

Detail **button next to the desired paper clip.**
   The ***View Clip Folder*** page appears.

This figure displays the ***View Clip Folder*** page.

5. **Click the**  ***Delete Doc*** **icon to delete the desired document within the clip.**
   The document is removed.

Reassigning a Paper Clip (Public Versus Private)

When a paper clip is assigned the status of private, only the creator or a member of the administration users group will have access to it.

To Reassign a Public Paper Clip as Private (and Vice Versa):

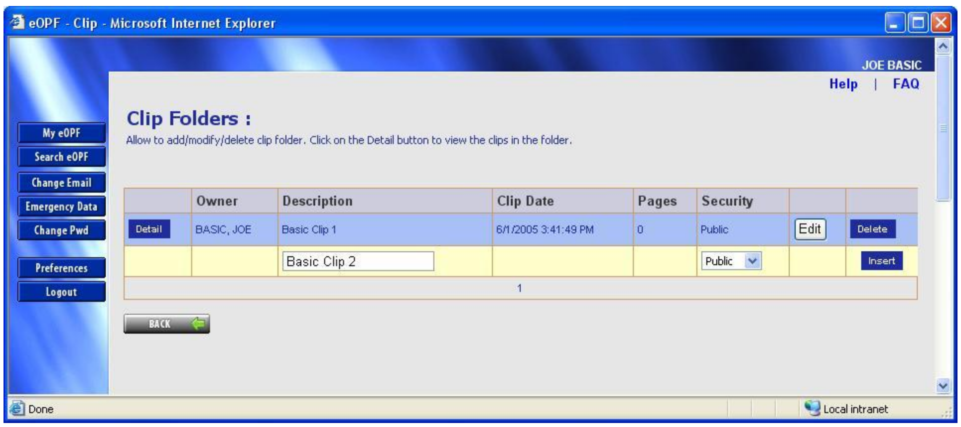
1. Perform a search for the desired folder(s) using the *Search* page.
The ***Search Results*** page displays.

2. From the *Search Results* page, select the reason for viewing the document from the *Reason* drop-down list.

3. Click on the *Folder Action* icon and select the Clip Folder *Clip Folder* option to display the *Clip Folders* for this folder.

The list of paper clips displays on the ***Clip Folders*** page.

This figure displays the ***Clip Folders*** page.



4. Click the Edit *Edit* button associated with the paper clip.

5. In the *Security* field, select either *Public* or *Private* based on your needs.

6. Click the Update *Update* button.

Deleting a Paper Clip

eOPF gives you the ability to delete paper clip associations you have created. Deleting a paper clip only removes the association between the documents, not the documents themselves. If you want to remove a document from eOPF, please see an eOPF Systems Administrator.

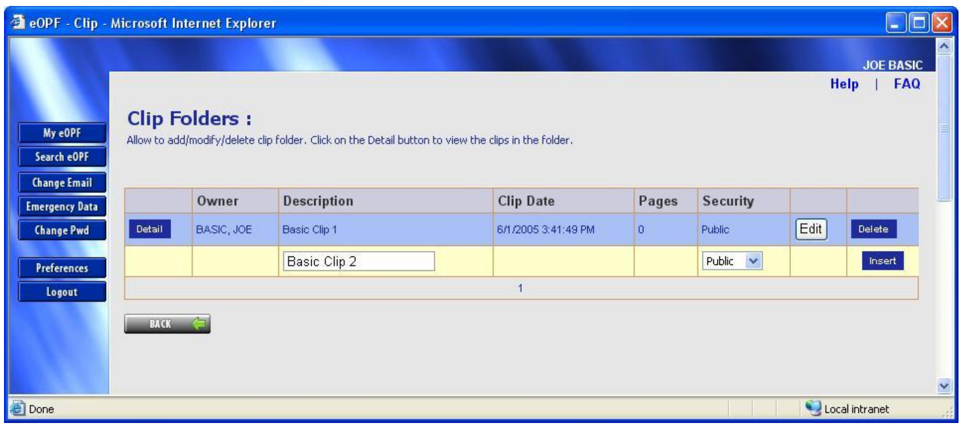
To Delete a Paper Clip Association from a Set of Documents:

1. **Perform a search for the desired folder(s) using the *Search* page.**
   The ***Search Results*** page displays.

2. **Click on the**  ***Folder Action*** **icon and select the** 

   Clip Folder **option to open the Clip Folders page of this folder.**
   The ***Clip Folders*** page appears.

This figure displays the ***Clip Folders*** page.



3. **Click the** 

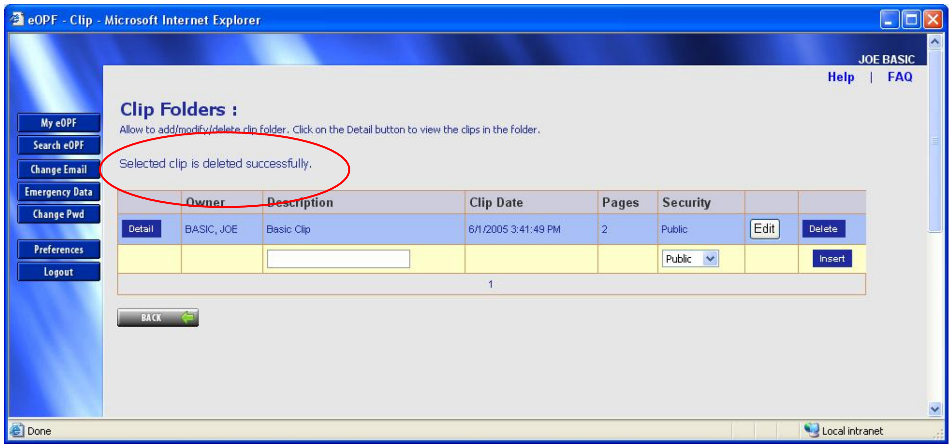
   Delete **button.**
   The *Confirmation* pop-up box appears.

The following figure displays the ***Confirmation*** pop-up box.

4. **Click the** 

   OK **button.**
   The Clip Folders page reappears displaying the following message "Selected clip is deleted successfully."

The following figure displays the ***Clip Folders*** page with a confirmation message.



Note:

A paper clip is classified as ***public*** or ***private***. Any user accessing the selected folder can view a public paper clip; however, ONLY the user that created the paper clip, a member of the administration users group, or an HR Specialist that manages the folder can view a private paper clip.

Chapter 10: Other HR Functions

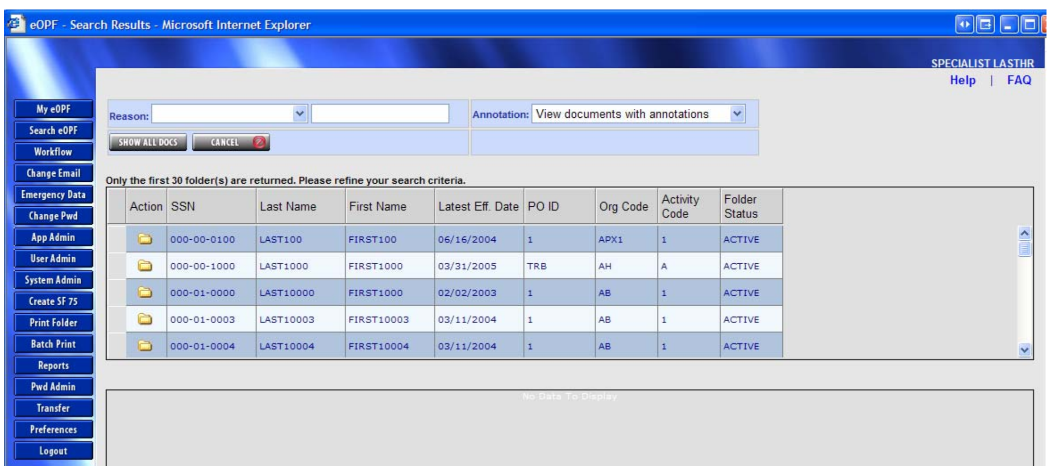
The eOPF allows users and HR personnel to view emergency data, view a position description, and view a career brief.

Viewing Emergency Data

This section provides step-by-step instructions for viewing an employee's emergency data. This information is available to supervisors and/or HR personnel for emergency use only. Emergency data is an employee voluntary feature, and thus may not contain data.

To View Emergency Data:

1. **Perform a search for the desired folder(s) using the *Search* page.**
   The ***Search Results*** page displays.



2. **From the *Search Results* page, select a *Reason* for viewing the emergency data.**

3. **Click on the  *Folder Action* icon and select the  *Emergency Data* option to edit *Emergency Data*.**

   The Emergency Contact Information page appears.

The following figure displays the ***Emergency Contact Information*** page.

4. **Click the**  ***Cancel*** **button.**
The ***Search Results*** page reappears.

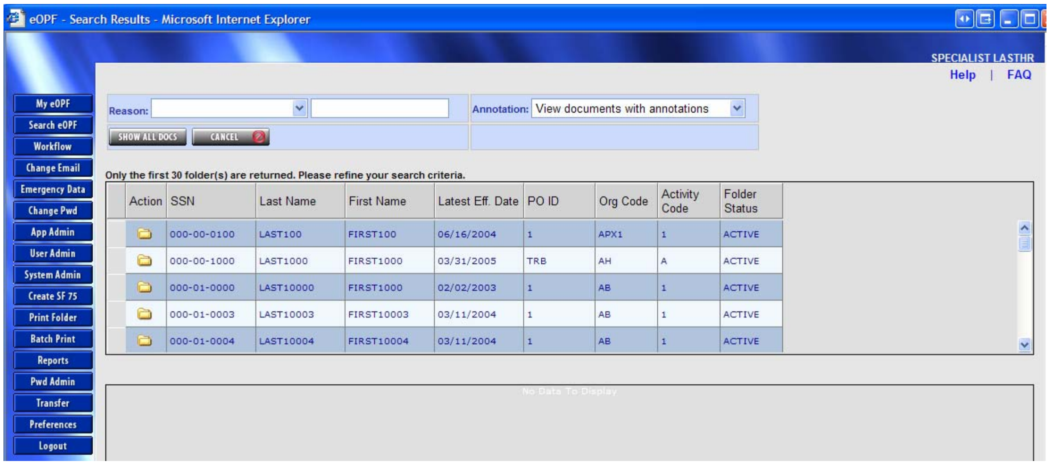
Viewing a Position Description (Optional Availability)

eOPF offers the capability to view position descriptions through an online position description query (PDQ). This must be implemented to be used. By default, the position description function is disabled.

To View a Position Description:

1. **Perform a search for the desired folder(s) using the *Search* page.**
The ***Search Results*** page displays.

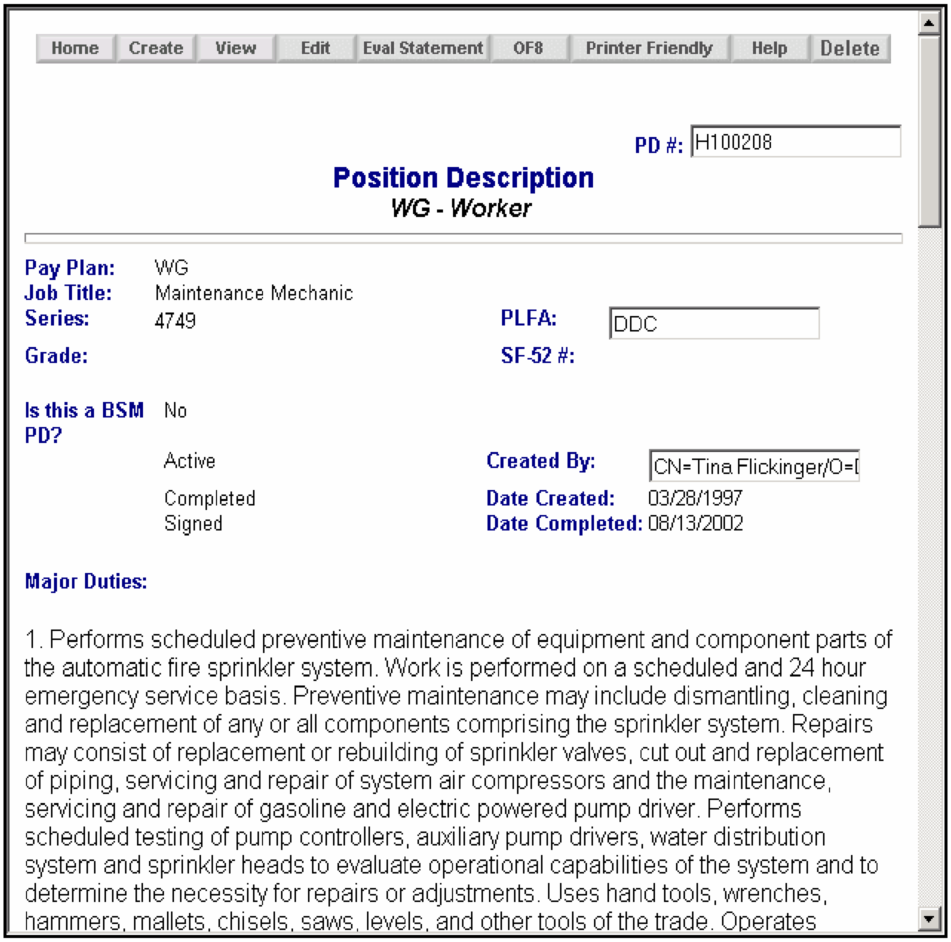
The following figure displays the ***Search Results*** page.



2. Click on the *Folder Action* icon and select the 

***View PDQ* option to view the PDQ.**

The following figure shows a sample PDQ document.



3. Close the PDQ window by clicking the ☒ *Close* button in the top right corner.

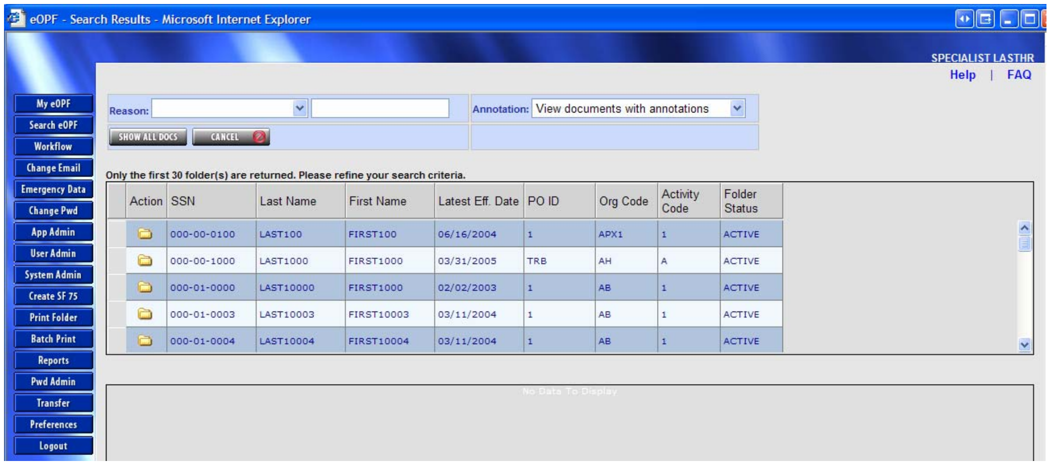
Viewing an Employee's Career Brief (Optional Availability)

Depending on the installation you may have the ability to view an employee's career brief. The career brief contains Personal Data, Position Data, and Career Information from data both internal and external to eOPF.

To View an Employee's Career Brief:

1. Perform a search for the desired folder(s) using the *Search* page.
The ***Search Results*** page displays.

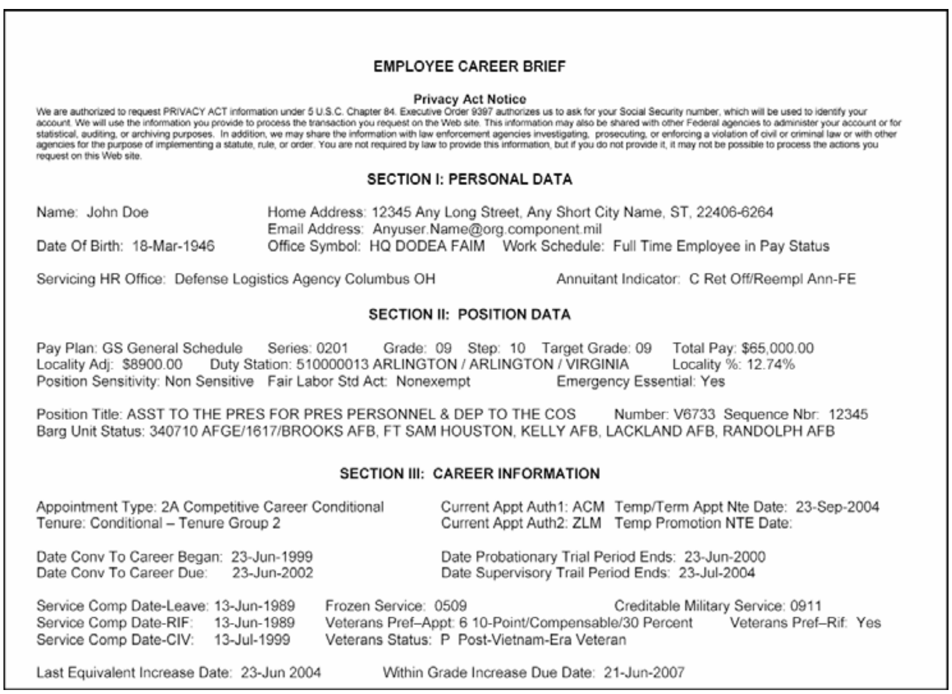
The following figure displays the ***Search Results*** page.



2. **On the *Search Results* page, select a *Reason* for viewing the career brief.**

3. **Click on the  *Folder Action* icon and select the  *View Career Brief* option to view the Career Brief.**

The following graphic is an example career brief. The actual format may be different based on Agency implementation.



EMPLOYEE CAREER BRIEF

Privacy Act Notice

We are authorized to request PRIVACY ACT information under 5 U.S.C. Chapter 84. Executive Order 9397 authorizes us to ask for your Social Security number, which will be used to identify your account. We will use the information you provide to process the transaction you request on the Web site. This information may also be shared with other Federal agencies to administer your account or for statistical, auditing, or archiving purposes. In addition, we may share the information with law enforcement agencies investigating, prosecuting, or enforcing a violation of civil or criminal law or with other agencies for the purpose of implementing a statute, rule, or order. You are not required by law to provide this information, but if you do not provide it, it may not be possible to process the actions you request on this Web site.

SECTION I: PERSONAL DATA

Name: John Doe Home Address: 12345 Any Long Street, Any Short City Name, ST, 22406-6264
Email Address: Anyuser.Name@org.component.mil
Date Of Birth: 18-Mar-1946 Office Symbol: HQ DODEA FAIM Work Schedule: Full Time Employee in Pay Status

Servicing HR Office: Defense Logistics Agency Columbus OH Annuitant Indicator: C Ret Off/Reempl Ann-FE

SECTION II: POSITION DATA

Pay Plan: GS General Schedule Series: 0201 Grade: 09 Step: 10 Target Grade: 09 Total Pay: $65,000.00
Locality Adj: $8900.00 Duty Station: 510000013 ARLINGTON / ARLINGTON / VIRGINIA Locality %: 12.74%
Position Sensitivity: Non Sensitive Fair Labor Std Act: Nonexempt Emergency Essential: Yes

Position Title: ASST TO THE PRES FOR PRES PERSONNEL & DEP TO THE COS Number: V6733 Sequence Nbr: 12345
Barg Unit Status: 340710 AFGE/1617/BROOKS AFB, FT SAM HOUSTON, KELLY AFB, LACKLAND AFB, RANDOLPH AFB

SECTION III: CAREER INFORMATION

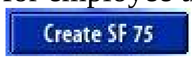
Appointment Type: 2A Competitive Career Conditional Current Appt Auth1: ACM Temp/Term Appt Nte Date: 23-Sep-2004
Tenure: Conditional – Tenure Group 2 Current Appt Auth2: ZLM Temp Promotion NTE Date:

Date Conv To Career Began: 23-Jun-1999 Date Probationary Trial Period Ends: 23-Jun-2000
Date Conv To Career Due: 23-Jun-2002 Date Supervisory Trail Period Ends: 23-Jul-2004

Service Comp Date-Leave: 13-Jun-1989 Frozen Service: 0509 Creditable Military Service: 0911
Service Comp Date-RIF: 13-Jun-1989 Veterans Pref–Appt: 6 10-Point/Compensable/30 Percent Veterans Pref–Rif: Yes
Service Comp Date-CIV: 13-Jul-1999 Veterans Status: P Post-Vietnam-Era Veteran

Last Equivalent Increase Date: 23-Jun 2004 Within Grade Increase Due Date: 21-Jun-2007

Creating an SF 75

The Create SF 75 process supports the HR specialist need to complete an SF 75 for employee transfer. This capability can be accessed by clicking on the 

Create SF 75 button found on the eOPF main menu. Access to the *Create SF 75* capability is assigned to a user group. A security function called "Web Main – Access to Create SF 75 documents" is listed and configured through the *Security Access* tab under the *User Admin* section of eOPF.

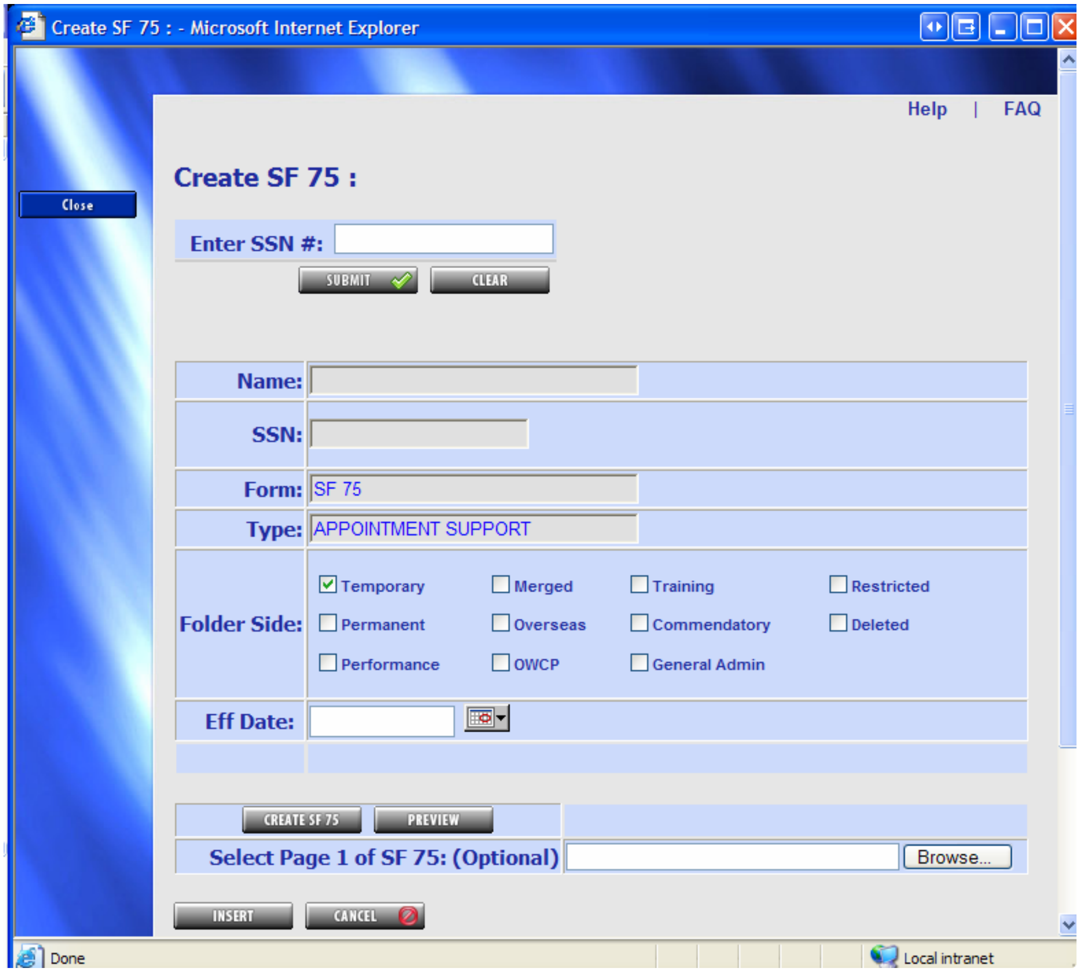
To Create an SF 75:

1. **Click the** 

***Create SF 75* button on the eOPF left side menu bar.**
   The *Create SF 75* page displays.

2. **Enter the employee SSN you want to complete an SF 75 form and click the *Submit* button.**
   The SSN is validated and the page is refreshed displaying the data associated with the entered SSN.

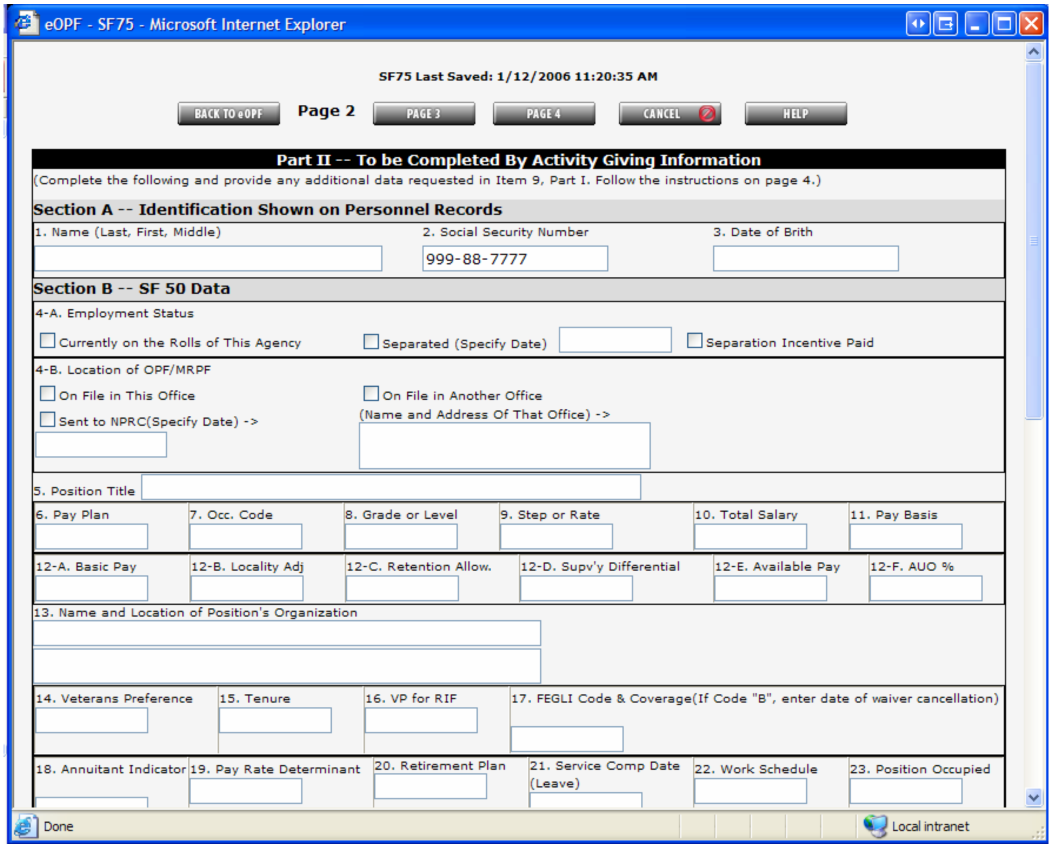
The following figure displays the ***Create SF 75*** page.



3. Verify that you are processing the correct employee.

4. Click on the  **Create SF 75 button.**
This will launch Page 2 of the SF 75 Template (Page 1 is to be filled in by the gaining agency).

The following figure displays Page 2 of the SF 75 PDF template.


eOPF - SF75 - Microsoft Internet Explorer

SF75 Last Saved: 1/12/2006 11:20:35 AM

BACK TO eOPF | Page 2 | PAGE 3 | PAGE 4 | CANCEL | HELP

Part II -- To be Completed By Activity Giving Information

(Complete the following and provide any additional data requested in Item 9, Part I. Follow the instructions on page 4.)

Section A -- Identification Shown on Personnel Records

1. Name (Last, First, Middle) | 2. Social Security Number 999-88-7777 | 3. Date of Brith

Section B -- SF 50 Data

4-A. Employment Status

☐ Currently on the Rolls of This Agency ☐ Separated (Specify Date) ☐ Separation Incentive Paid

4-B. Location of OPF/MRPF

☐ On File in This Office ☐ On File in Another Office

☐ Sent to NPRC(Specify Date) -> (Name and Address Of That Office) ->

5. Position Title

6. Pay Plan | 7. Occ. Code | 8. Grade or Level | 9. Step or Rate | 10. Total Salary | 11. Pay Basis

12-A. Basic Pay | 12-B. Locality Adj | 12-C. Retention Allow. | 12-D. Supv'y Differential | 12-E. Available Pay | 12-F. AUO %

13. Name and Location of Position's Organization

14. Veterans Preference | 15. Tenure | 16. VP for RIF | 17. FEGLI Code & Coverage(If Code "B", enter date of waiver cancellation)

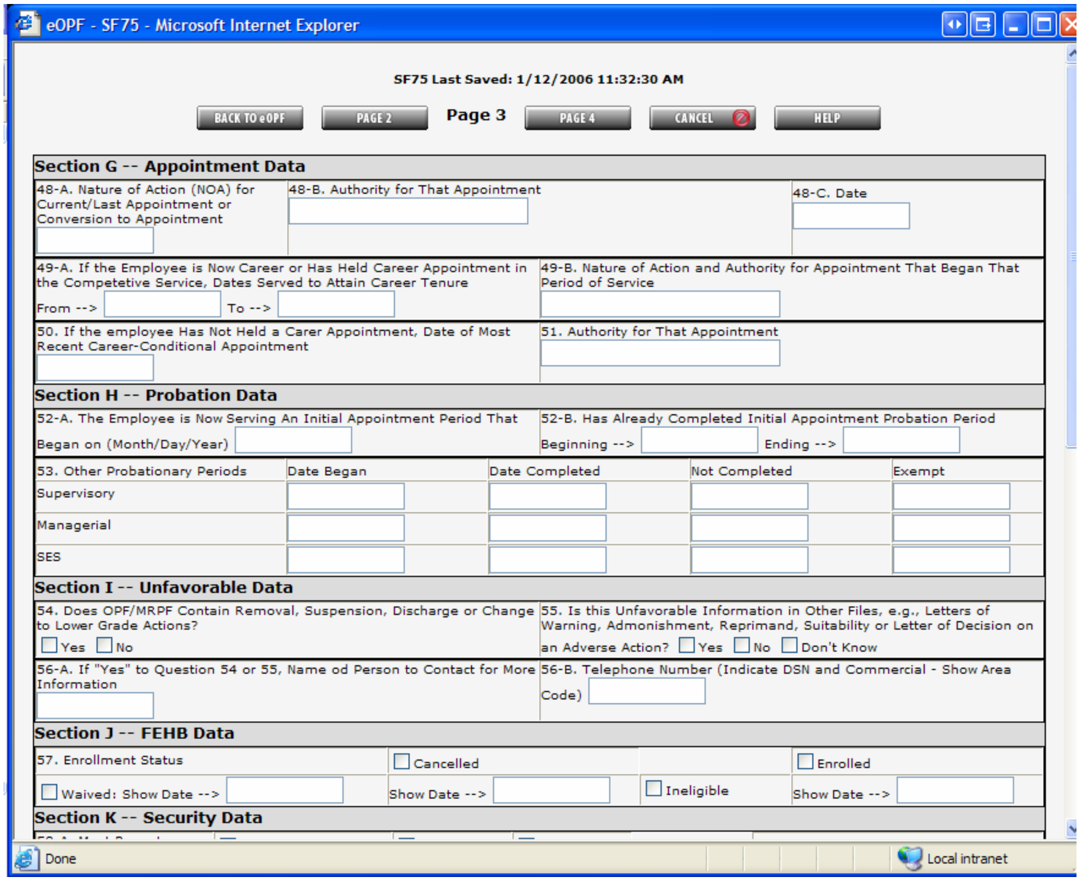
18. Annuitant Indicator | 19. Pay Rate Determinant | 20. Retirement Plan | 21. Service Comp Date (Leave) | 22. Work Schedule | 23. Position Occupied

Done | Local intranet

• Fields in *Section A* and *Section B* on Page 2 will be filled in using the data from the latest SF 50 provided by electronic feed for the employee. However, if needed, HR Specialist can override these values. If there is an existing SF 75 for the employee (created using eOPF), data from this document will be filled in the rest of the sections of the SF 75 template. HR Specialist can override these values.

• Fill in all relevant information, and click on “Page 3” link at the top of the page. (Data entered on Page 2 will be automatically saved in the database).

The following figure displays Page 3 of the SF 75 PDF template.



eOPF - SF75 - Microsoft Internet Explorer

SF75 Last Saved: 1/12/2006 11:32:30 AM

BACK TO eOPF | PAGE 2 | **Page 3** | PAGE 4 | CANCEL | HELP

Section G -- Appointment Data

48-A. Nature of Action (NOA) for Current/Last Appointment or Conversion to Appointment

48-B. Authority for That Appointment

48-C. Date

49-A. If the Employee is Now Career or Has Held Career Appointment in the Competetive Service, Dates Served to Attain Career Tenure

From --> To -->

49-B. Nature of Action and Authority for Appointment That Began That Period of Service

50. If the employee Has Not Held a Carer Appointment, Date of Most Recent Career-Conditional Appointment

51. Authority for That Appointment

Section H -- Probation Data

52-A. The Employee is Now Serving An Initial Appointment Period That Began on (Month/Day/Year)

52-B. Has Already Completed Initial Appointment Probation Period

Beginning --> Ending -->

53. Other Probationary Periods	Date Began	Date Completed	Not Completed	Exempt
Supervisory				
Managerial				
SES				

Section I -- Unfavorable Data

54. Does OPF/MRPF Contain Removal, Suspension, Discharge or Change to Lower Grade Actions?

Yes No

55. Is this Unfavorable Information in Other Files, e.g., Letters of Warning, Admonishment, Reprimand, Suitability or Letter of Decision on an Adverse Action? Yes No Don't Know

56-A. If "Yes" to Question 54 or 55, Name od Person to Contact for More Information

56-B. Telephone Number (Indicate DSN and Commercial - Show Area Code)

Section J -- FEHB Data

57. Enrollment Status

Cancelled

Enrolled

Waived: Show Date -->

Show Date -->

Ineligible

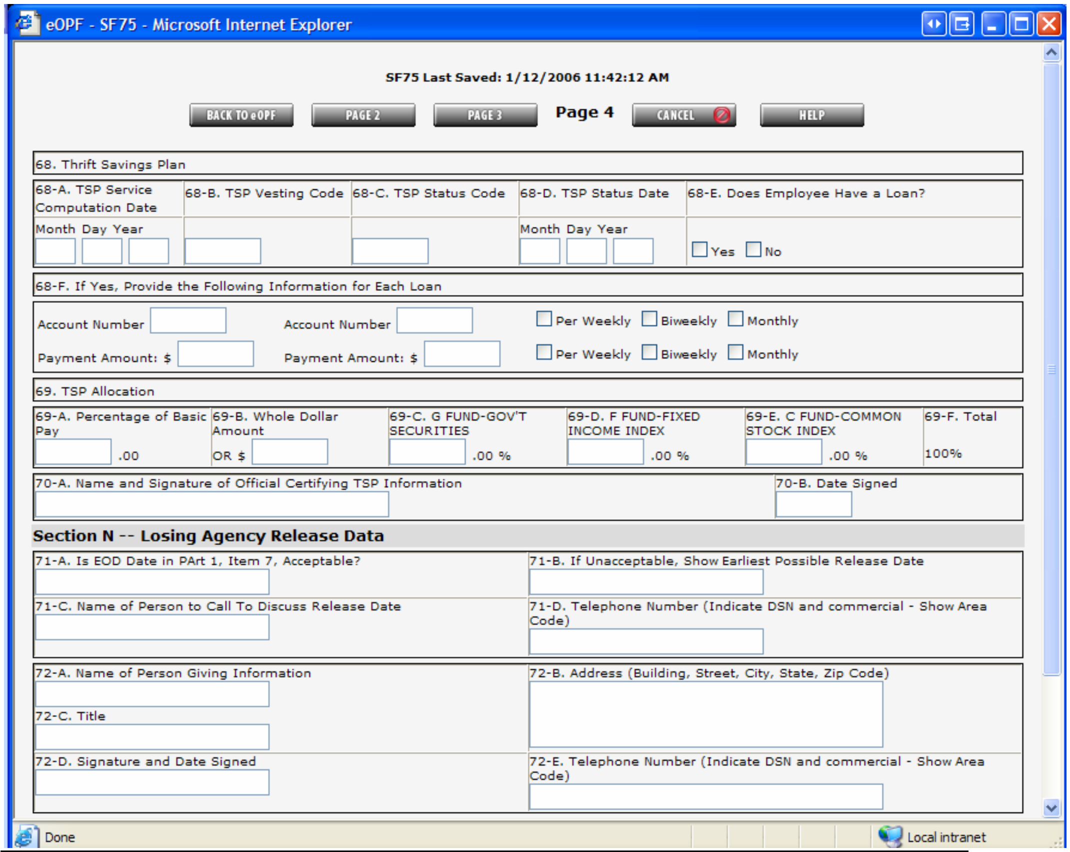
Show Date -->

Section K -- Security Data

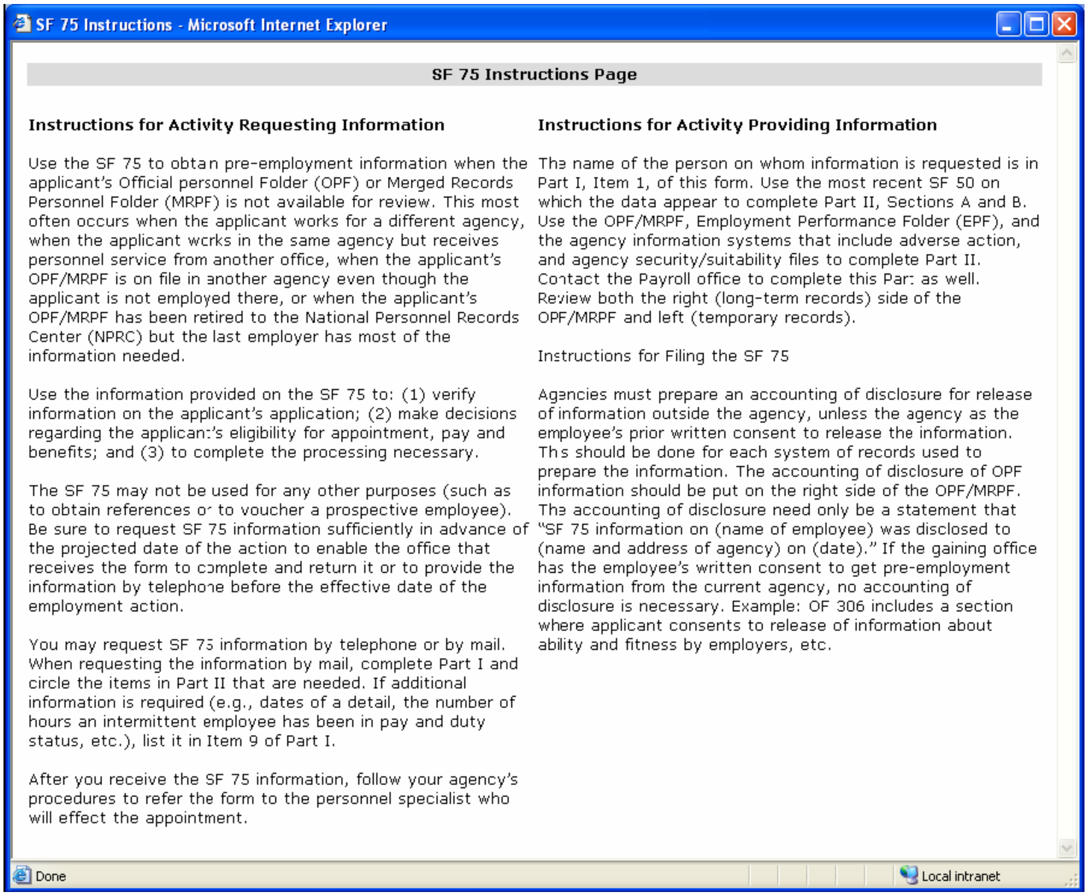
Done

Local intranet

The following figure displays Page 4 of the SF 75 PDF template.



• Click on “Help” link from any of the SF 75 creation pages, to open the SF 75 Instructions page



SF 75 Instructions - Microsoft Internet Explorer

SF 75 Instructions Page

Instructions for Activity Requesting Information

Use the SF 75 to obtain pre-employment information when the applicant’s Official personnel Folder (OPF) or Merged Records Personnel Folder (MRPF) is not available for review. This most often occurs when the applicant works for a different agency, when the applicant works in the same agency but receives personnel service from another office, when the applicant’s OPF/MRPF is on file in another agency even though the applicant is not employed there, or when the applicant’s OPF/MRPF has been retired to the National Personnel Records Center (NPRC) but the last employer has most of the information needed.

Use the information provided on the SF 75 to: (1) verify information on the applicant’s application; (2) make decisions regarding the applicant’s eligibility for appointment, pay and benefits; and (3) to complete the processing necessary.

The SF 75 may not be used for any other purposes (such as to obtain references or to voucher a prospective employee). Be sure to request SF 75 information sufficiently in advance of the projected date of the action to enable the office that receives the form to complete and return it or to provide the information by telephone before the effective date of the employment action.

You may request SF 75 information by telephone or by mail. When requesting the information by mail, complete Part I and circle the items in Part II that are needed. If additional information is required (e.g., dates of a detail, the number of hours an intermittent employee has been in pay and duty status, etc.), list it in Item 9 of Part I.

After you receive the SF 75 information, follow your agency’s procedures to refer the form to the personnel specialist who will effect the appointment.

Instructions for Activity Providing Information

The name of the person on whom information is requested is in Part I, Item 1, of this form. Use the most recent SF 50 on which the data appear to complete Part II, Sections A and B. Use the OPF/MRPF, Employment Performance Folder (EPF), and the agency information systems that include adverse action, and agency security/suitability files to complete Part II. Contact the Payroll office to complete this Part as well. Review both the right (long-term records) side of the OPF/MRPF and left (temporary records).

Instructions for Filing the SF 75

Agencies must prepare an accounting of disclosure for release of information outside the agency, unless the agency as the employee’s prior written consent to release the information. This should be done for each system of records used to prepare the information. The accounting of disclosure of OPF information should be put on the right side of the OPF/MRPF. The accounting of disclosure need only be a statement that “SF 75 information on (name of employee) was disclosed to (name and address of agency) on (date).” If the gaining office has the employee’s written consent to get pre-employment information from the current agency, no accounting of disclosure is necessary. Example: OF 306 includes a section where applicant consents to release of information about ability and fitness by employers, etc.

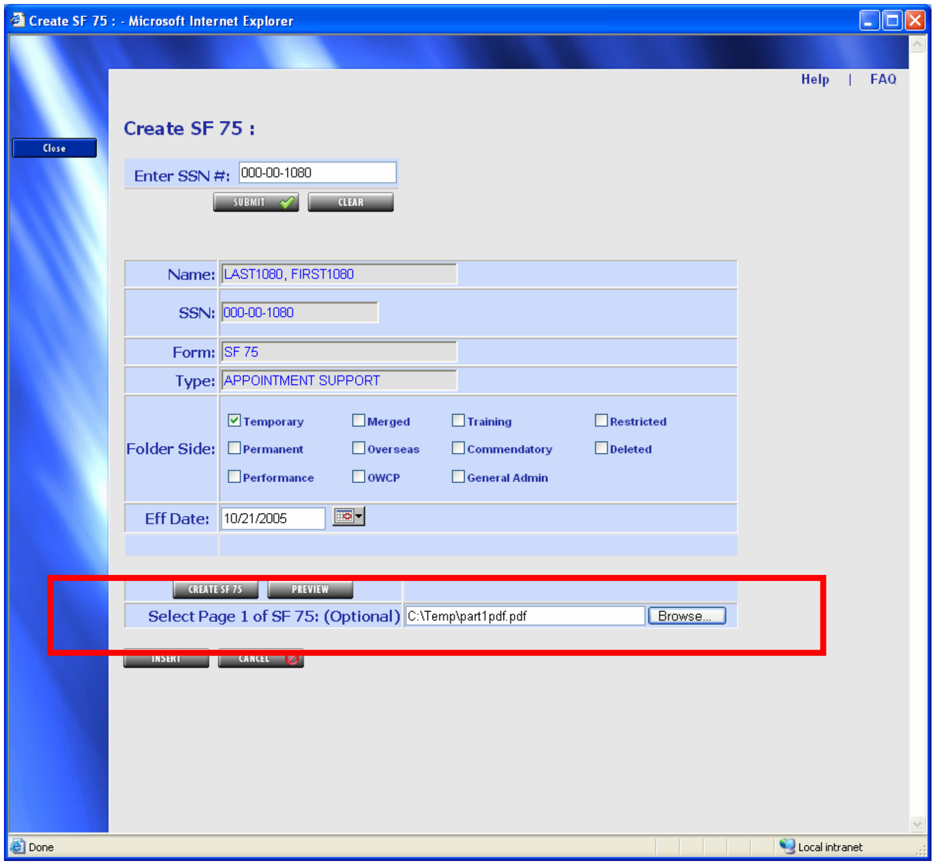
Done | Local intranet

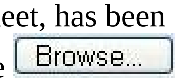
5. Edit the SF 75 displayed as required.

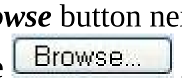
6. Upon finishing the editing process, click the  ***Back to eOPF*** **button.**

This will reload the *Create SF 75* page.

7. Select the folder side for the SF 75 form and enter the effective date.

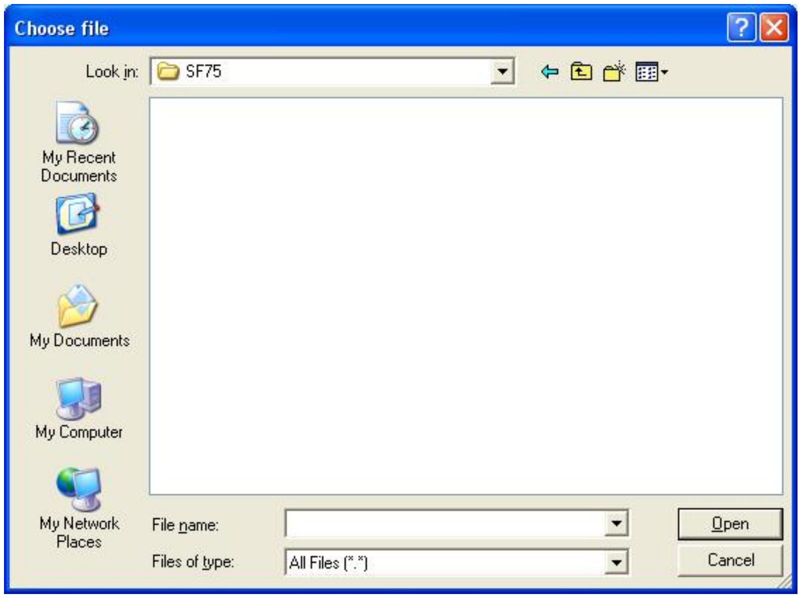


8. **(Optional) Click on the *Browse* button next to the *Select Page 1 of SF 75* if you have page 1 of the SF 75 as a separate file.**
   If Page 1 of the SF 75, which is a SF 75 cover sheet, has been captured, browse for and select that file using the 

 Browse button next to the *Select Page 1 of SF 75: (Optional)* field. The 

 Browse button opens the standard ***Choose File*** window.

The following figure displays the ***Choose File*** window.



9. If HR Specialist wants a Preview of the final SF 75 document that will be created and placed in employee's OPF, he/she can click on the Preview button.

A preview of the Part 2 of SF 75 document will be displayed in Adobe Acrobat.

10. If everything looks correct with the new SF 75 document, HR specialist can click on the "Insert" button. This will create a PDF file and insert this document into employee's OPF based on the data provided on the web page.

Note:

If for some reason, HR specialist wants to cancel the creation of SF 75 document; he/she can click on the ***Cancel*** button. This would prevent the document from being inserted into the employee's OPF.

The following activities occur when the ***Insert*** button is activated.

- The SSN is validated.
- Data associated with the SSN is confirmed.

- Validation of a folder side and effective date for the SF 75 is performed.
- Checks if files were selected for upload by you are made.
- If Page 1 is included, then Page 1 is merged with the SF 75 form file.
- Information is selected from SF 75 PDF form.
- EOPF Inserts/Updates info in to the EOPF_SF75_DATA table.
- Based on the entered SSN, a new SF 75 document is created in the employee's folder.
- The SF 75 is copied into the eOPF repository.

After the insertion process is complete, the ***Create SF 75*** page is refreshed. To create a new SF 75, click on the *Clear* button and start another SF 75. To return to the ***eOPF Welcome*** page click the ***Cancel*** button or select the ***Close*** button from the eOPF left side menu bar to perform another activity.

Part III - EOPF Administrator Functions

The following chapters cover eOPF Administrator Functions in the eOPF system and is related to the eOPF administrators accessing the eOPF system.

Chapter 11: Working with Documents

Deleting Documents

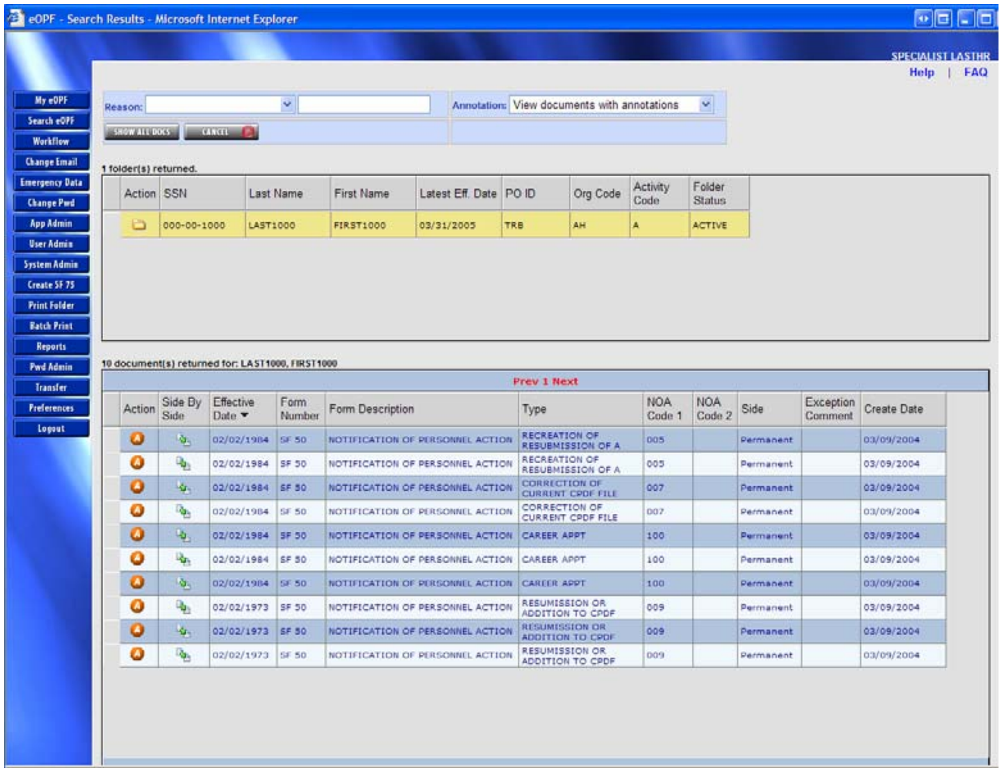
There may be instances as a systems administrator when you need to delete an existing document. A document could have been added erroneously, in which case it needs to be deleted.

To Delete an Existing Document:

1. **Perform a search for the desired documents.**
   The ***Search Results*** page displays.

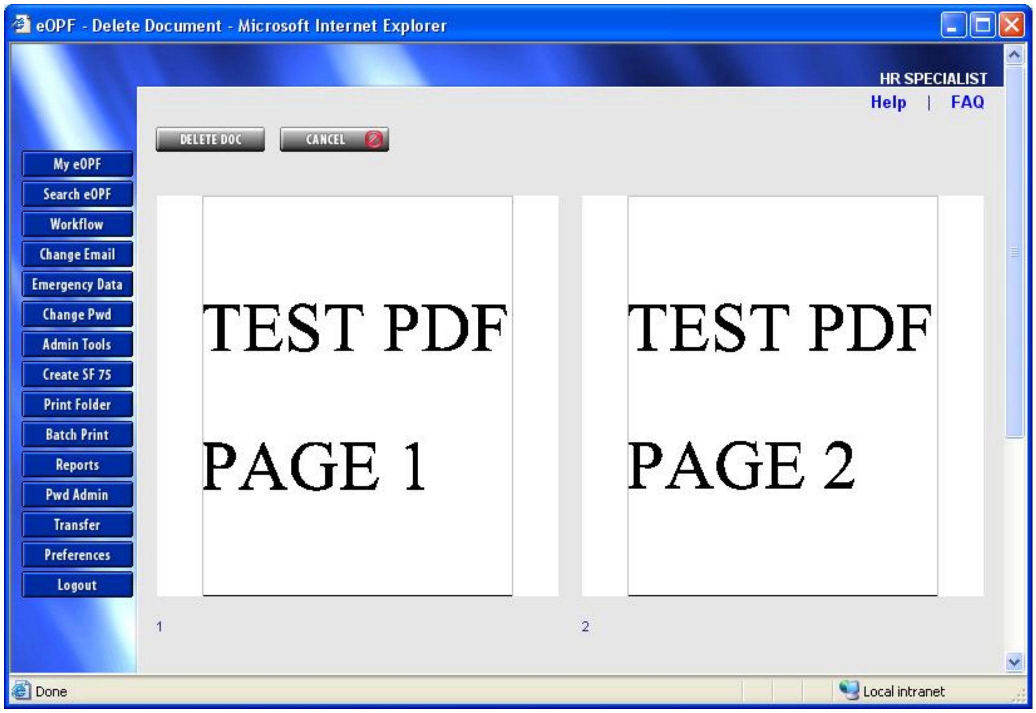
2. **From the *Search Results* page, select a reason from the *Reason* drop-down list for deleting the document.**

The following figure displays the ***Search Results*** page.



3. Click the *Action* icon corresponding to the document you want to delete and selecting the *Delete* icon.
The page refreshes with a view of the document chosen for deletion. You can expand any page for a close-up examination of the page(s) before deleting.

The following figure displays document pages.

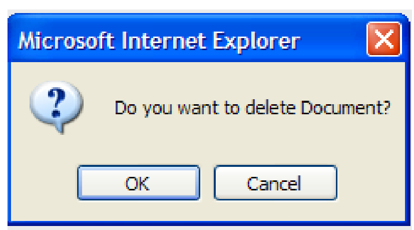


4. **Click the** 

Delete Doc **button.**
A confirmation pop-up box appears. (If you do not wish to delete, click the 

Cancel button.)

The following graphic displays the delete confirmation pop-up box.



5. **Click the** 

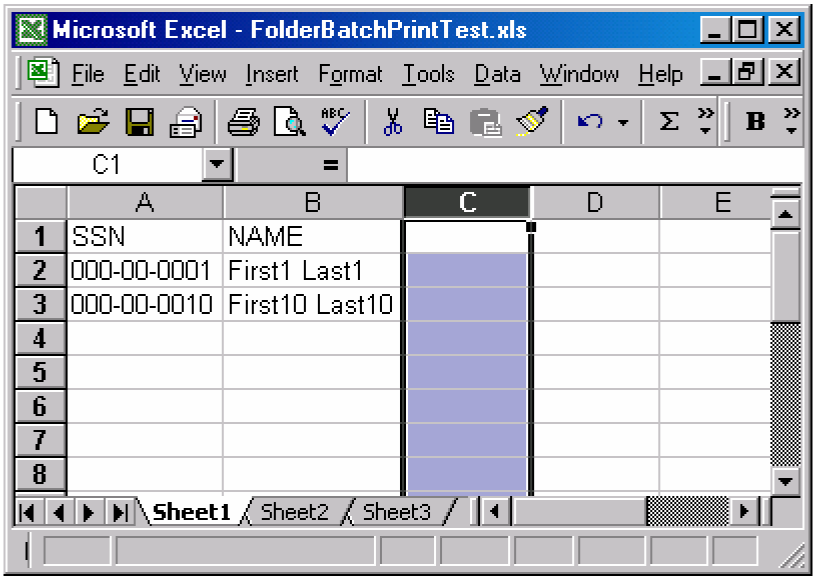
OK **button.**
The *Search Results* page reappears with the document deleted.

Note:
The document is moved to the delete folder. The EOPF administrator has access to this folder.

Printing Batch Folders

eOPF systems administrators have the ability to print multiple folders simultaneously. This section provides step-by-step instructions for Batch Printing Multiple Folders. An Excel document needs to be created prior to using this function. The Excel document should include 2 columns. The first column should contain the SSN with the dashes and the second column should contain the first and last name of the desired employee. The first row of the spreadsheet needs to contain column headers SSN and Name. The Worksheet tab must be named ‘Sheet1’. See graphic below.

The figure shows a sample Excel document.



To Print a Batch of Folders:

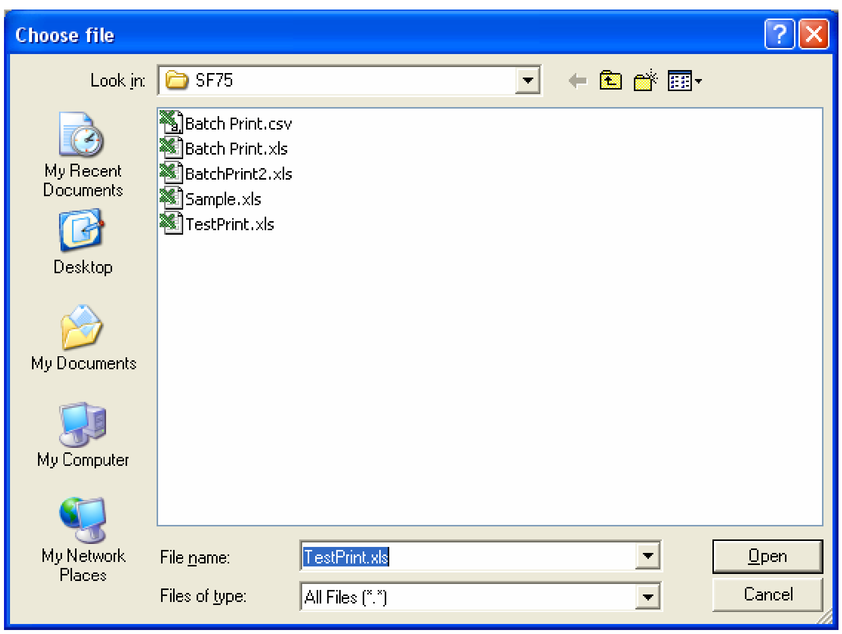
1. **Click the *Batch Print* button on the eOPF main menu.**
   The ***Folder Batch Print*** page displays.

The following figure displays the ***Folder Batch Print*** page.

2. Select the 

Browse **button.**

The *Choose File* dialog box appears.

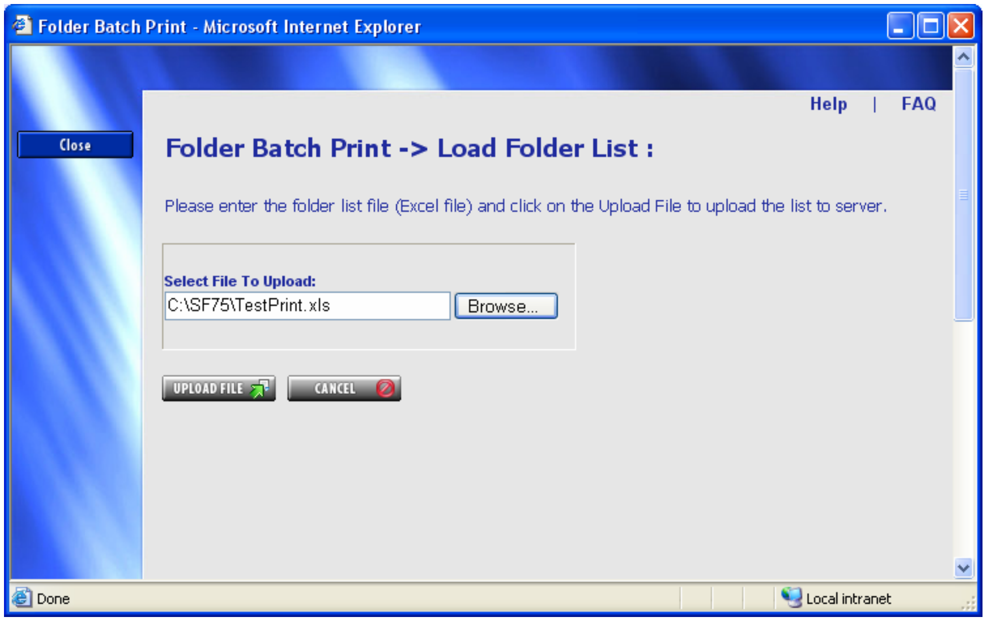


3. Locate the desired file, and then click the 

Open **button.**

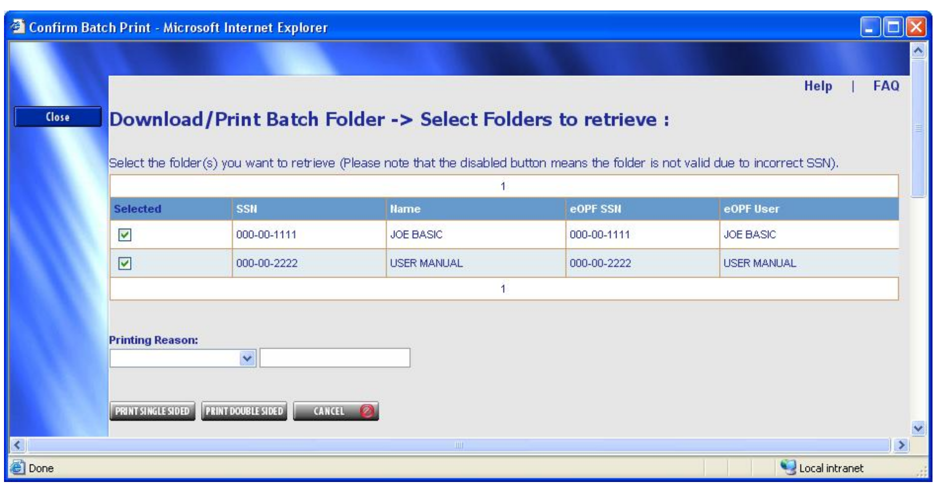
The ***Folder Batch Print*** page reappears with the file name displayed.

The following figure displays the ***Folder Batch Print*** page with a file name showing.



4. **Click the**  ***Upload File*** **button to upload the Excel file to the eOPF Web Service, which will then produce a list of folders that you can download.**
   The ***Download Batch Print Folder*** page appears.

The following figure displays the ***Folder Batch Print*** page.



5. **Confirm (check/uncheck) the folders to print.**

6. **Select a reason from the *Reason* drop-down list.**

7. **Click the** 

Print Single Sided or the 

Print Double Sided button.
   Using the *Print Double Sided* button cause the application to ensure documents are properly separated for printing on a duplex printer. The desired folders and documents will appear as one PDF in the Adobe Acrobat.

8. **Print the file from Adobe Acrobat.**

Modifying Documents

The Modify feature is available from the Search Results Page. This feature allows you to add or remove pages from a specific document. You cannot modify the actual data within the document pages. This feature is only available to users in the AVI/AVIS user group and is used by HR Specialists.

Importing a New Page into an Existing eOPF Document

Pages already available in electronic format (image, PDF, document, etc.) can be added to an existing document. eOPF supports the file extensions: .tiff, .bmp, .jpeg, .gif, .pcx, .pdf, .txt, and .doc.

Note:
This information is also found in Chapter 5: Adding Documents

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To Insert a New Page from an Electronic File:

1. **Retrieve and open the desired eOPF document.**

2. **From the Search Results, enter a Reason code for viewing the document.**

3. **Modify a document by clicking the Action icon of the corresponding to the document you want to modify and select the Modify option.**

Note:
The only modification of the document being done is the addition of new pages.

---

4. **Click the Import button.**

   A confirmation pop-up box appears.

5. **Click Yes.**

   The Page Import dialog box appears.

6. **Select the desired document, and then click the OK button.**

   A confirmation pop-up box appears displaying the following message "New Page was successfully imported."

7. **Click the Close button.**

   A Close Document confirmation pop-up box appears.

8. **Click Yes.**

Deleting a Page from an eOPF Document

Deleting a page from an eOPF document means that it will be permanently removed from the system. Therefore, it is critical that this decision be carefully evaluated before removing a page. Deleting a page is reserved for instances when a page was erroneously entered in eOPF.

Note:
This information is also found in Chapter 7: Removing Documents and Pages

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Note:
Removing a page only removes that individual page, not the entire document. If a document only contains one page, you cannot use this function; instead use Delete Document. Index information and other associated data remains in eOPF with the document, even when the specified page is removed.

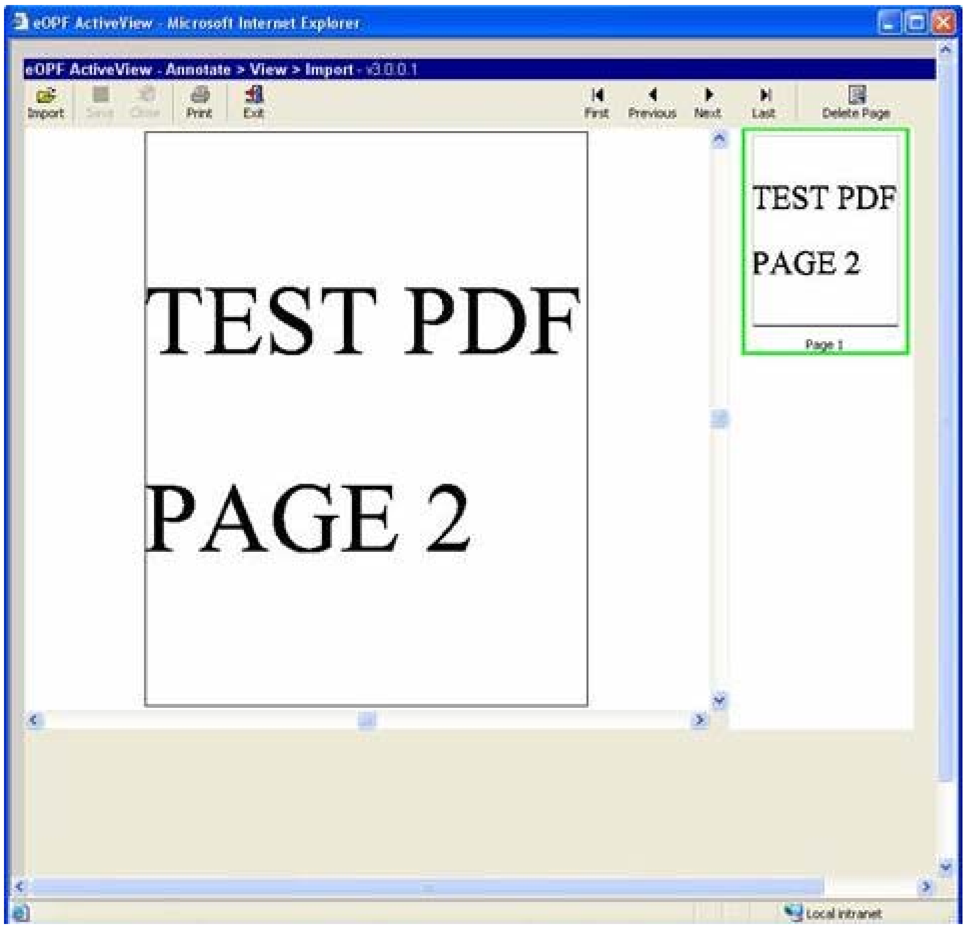
To Delete a Page from an eOPF Document:

1. **Search for and locate the eOPF document from which you wish to remove a page.**

   The Search Results page displays.

2. Modify a document by clicking the Action icon of the corresponding to the document you want to modify and select the Modify option.

The ***ActiveView*** page appears.



Note:

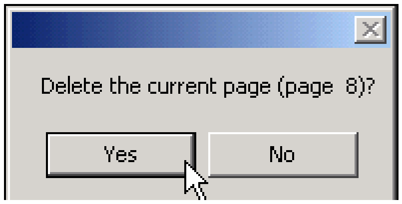
The only modification of the document being done is the deletion of pages. No data on the document can be modified.

---

3. Navigate to the page you wish to delete, and then click the 

Delete Page button.

A delete confirmation box appears.

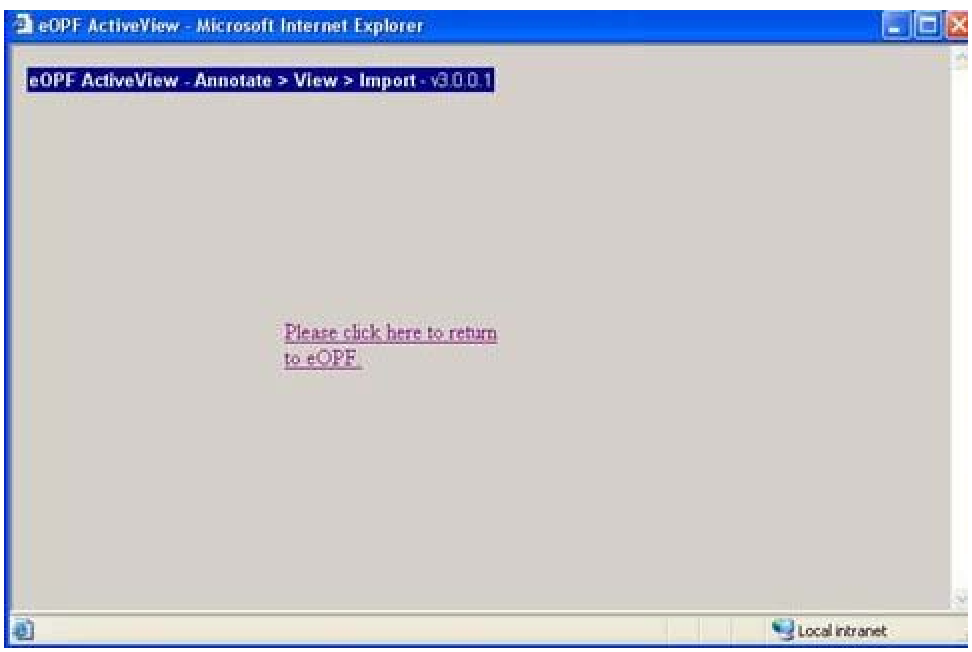


4. Click the Yes button.

The page is removed and the display is refreshed in the eOPF Active View window.

5. Click Exit.

This returns you to the 'Please click here to return to eOPF' prompt. Click on the link to return to your start result page.



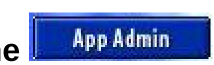
Chapter 12: Working with Forms (App Admin)

eOPF administrators have the ability to add, edit and delete form indexing information. The indexing is the framework by which documents are identified in the eOPF. Each form and/or document is defined through this tool so that users can quickly search for a specific document or set of documents according to a description that is familiar to the HR staff. The Administrator also places the forms into one or more categories. A form can be labeled as belonging to one or more categories including ‘Obsolete’, ‘Common’, or ‘Transfer’. Obsolete means the form is nolonger used. ‘Common’ cause the form to be listed on the search page when a user selects list only common forms. ‘Transfer’ indicates that this form should be transferred when an OPF is transferred between agencies.

Adding a Form

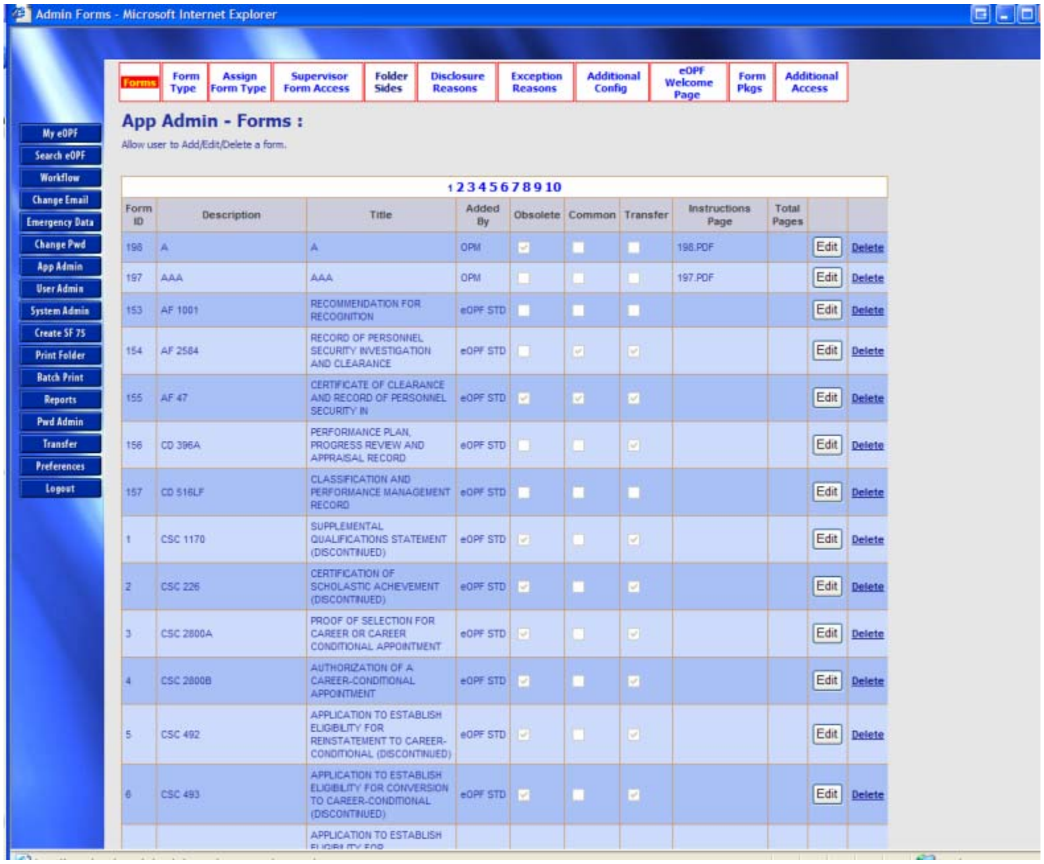
As an eOPF administrator, you have the ability to add a form. Before adding a new form, verify that the form does not already exist by scrolling through the *Forms* page.

To Add a Form:

1. **From the eOPF main menu buttons, click the** 

   ***App Admin* button.**
   The *Forms* tab of the ***App Admin*** page displays by default.

The following figure displays the ***Forms*** page.



The following table describes the fields listed on the ***Forms*** page.

Element	Required (R) / Optional (O)	Description
Form ID	R	System Generated.
Description	R	Enter the form Number/Short Name.
Title	R	Enter the title of the form.
Added By	R	Indicates the source of the form. System Generated.
Obsolete	O	The form is active by default and available to be used during indexing. Check the box if Obsolete and should not be available during indexing.
Common	O	This form is frequently accessed or searched. It should be a member of the common forms list and available when a user selects list only

Element	Required (R) / Optional (O)	Description
		common forms on the eOPF search page.
Transfer	O	Indicates that all instances of this form that exist in an OPF should be included in a transfer to another agency.
Instructions Page	O	You may define a separate file that maintains the instruction pages for a form.
Total Pages	O	Enter the total number of pages.

2. Scroll to the *Insert* line at the bottom of the page and complete the fields as shown in the following figure.

Note:

You can control the number of rows listed by using your user preferences found by clicking on the ***Preferences*** button in the main menu bar on the left side of your screen.

3. Optionally, use the *Attach File* button to assign the file containing the instruction pages for the form.

The file should be a PDF formatted file.

4. **Click the Insert *Insert* link.**
   The ***Forms*** page updates with the following message displayed: "Form is added successfully".

Note:

The Attach File ***Attach File*** button is used to attach a PDF file containing only the instruction pages that go with this form. Instruction pages are not required.

Editing a Form

eOPF administrators have access to edit the form information. Form information should be edited when the data in any of the fields described changes.

To Edit a Form:

1. **From the eOPF main menu buttons, click the App Admin *App Admin* button.**
   The *Forms* tab of the ***App Admin*** page displays by default.

2. **Locate the desired form; then click the Edit *Edit* button.**
   The *Forms* tab reappears with the fields opened for editing.

The following figure shows the ***Forms*** page with a form selected for editing.

3. **Change form specific data and add/remove the instruction pages using the *Change File* button associated with the form, as desired.**

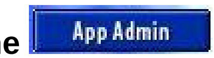
4. **Edit the desired fields; then click the** Update ***Update*** **button to save the changes or click the** Cancel ***Cancel*** **button to cancel the edit process.**
The ***Forms*** page reappears with the fields updated.

Deleting a Form

As an eOPF administrator, there will be times when you need to delete a form; i.e., either the form was added erroneously or information within a form becomes invalid. However, before deleting a form, verify that the entire form needs to be deleted versus being updated because once a form is deleted, the entire form is removed.

A form cannot be deleted if there are any OPF documents indexed using the form itself. An attempt to delete a form, which has documents related to it, will produce an error message indicating that you should re-index the document prior to deleting the form. Deleting the form does not delete any OPF documents.

To Delete a Form:

1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Locate the desired form, and then click the _Delete_ link.**
The *Confirmation* pop-up box appears.

The following figure displays the ***Confirmation*** box.

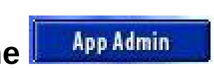
3. **Click** 

_OK_ button.
The ***Forms*** tab reappears with the form deleted.

Adding an Instruction Page to a Form

A form may have instruction pages assigned allowing a user to view/print the instruction page when viewing documents in an OPF. During the addition of a new form the form's instruction page may be assigned or the form may be edited at a later date and the instruction form added or removed.

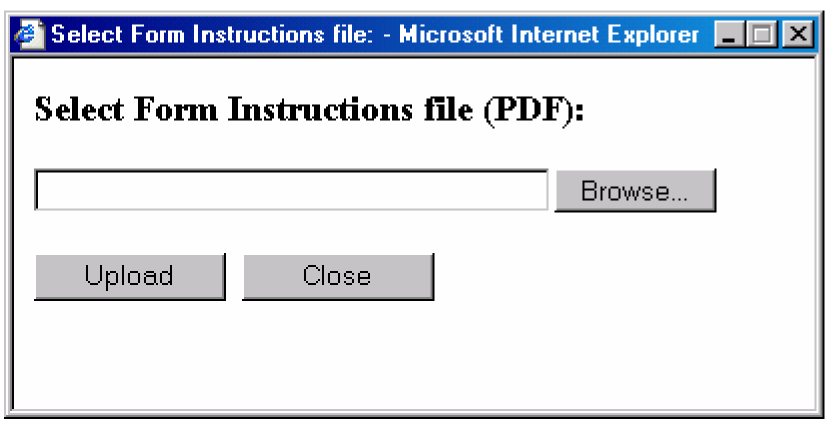
To Add an Instruction Page to a Form:

1. **From the eOPF main menu buttons, click the** 

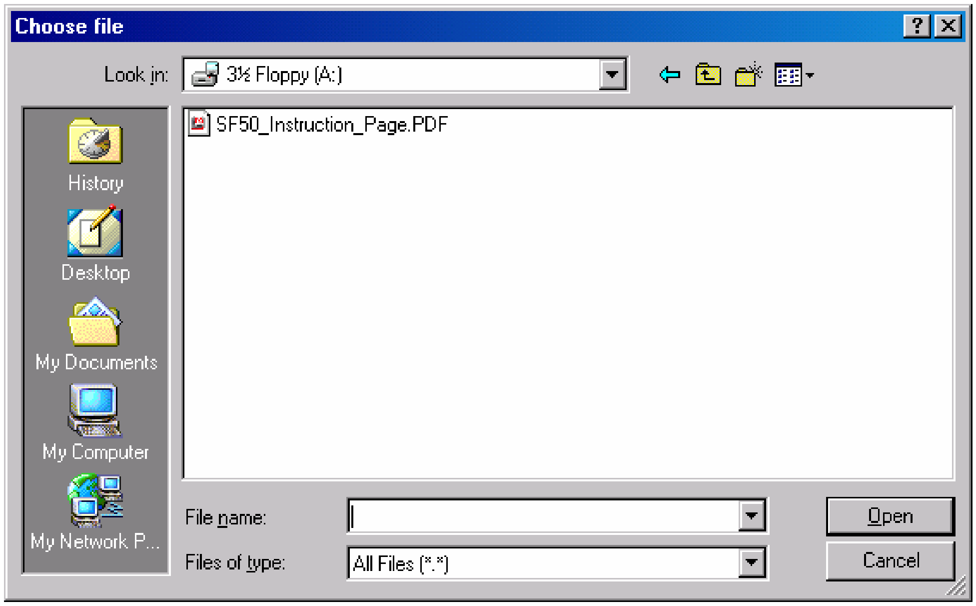
App Admin button.
The ***Forms*** tab of the ***App Admin*** page displays by default.

2. **Locate the desired form, and then click the *Edit* button.**
The web page is updated and the selected forms fields are enabled for editing. The following figure displays an example of the web page to edit the form.

3. **Click the** Change File ***Change File* button.**
The *Select Form Instruction file (PDF)* window appears prompting you to designate the Instruction Page file. The file must be a PDF of the instruction pages for the selected form.



4. **Click the *Browse* button.**
The *Choose File* window is displayed. Select the Instruction Page file and click the *Open* button. The file must be a PDF of the instruction pages for the selected form.



5. Click the 

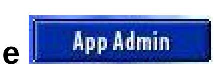
***Upload* button.**

This closes the *Select Form Instruction file (PDF)* window and returns you to the main Forms administration page. On this page, click on the *Update* button to complete the addition of instruction pages to and existing form.

Adding a Form Package

A form package is a predefined collection of documents that is used during the course of a particular business process, such as conducting a retirement estimate or a Reduction-in-Force (RIF). The HR staff member can quickly search the eOPF repository for documents that meet the criteria defined in a particular package. This App Admin web pages within eOPF provides the functionality for the eOPF administrator to configure the packages in eOPF to contain the First, Most Recent or All documents of any one or more sets of the forms defined in eOPF. Only the documents specified will be displayed when the user chooses that particular package to view.

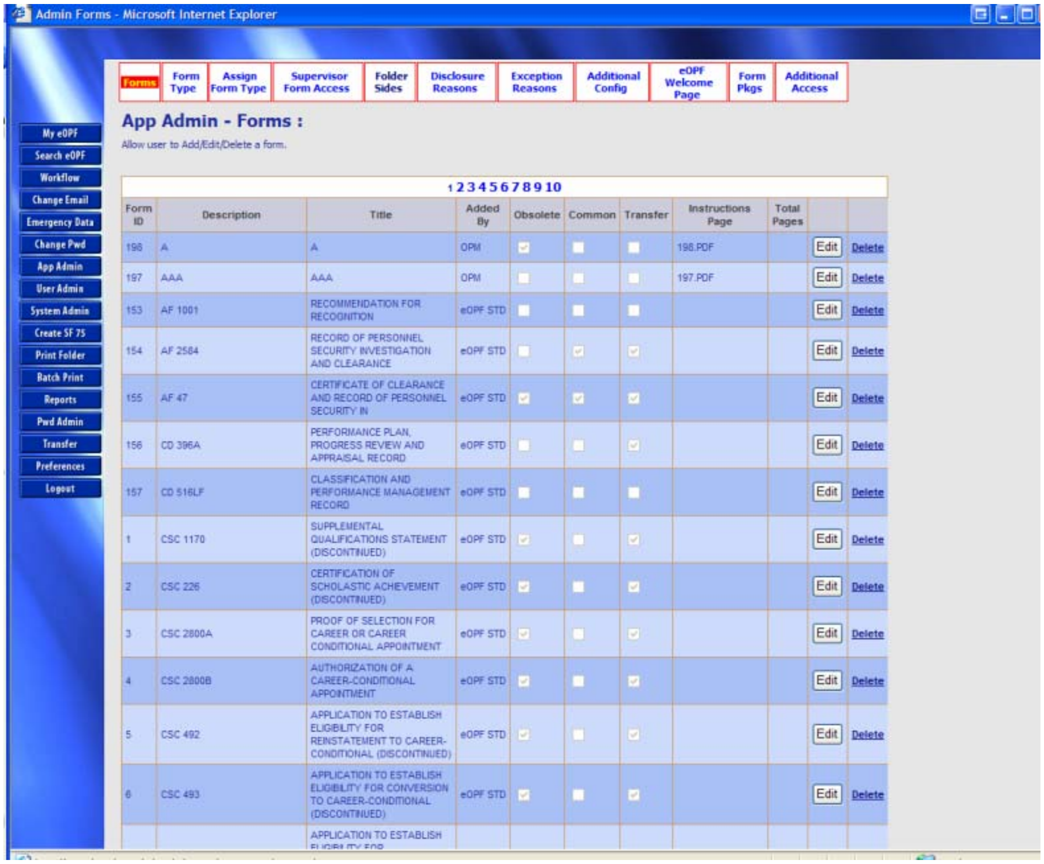
To Add a Form Package:

1. From the eOPF main menu buttons, click the 

***App Admin* button.**

The *Forms* tab of the ***App Admin*** page displays by default.

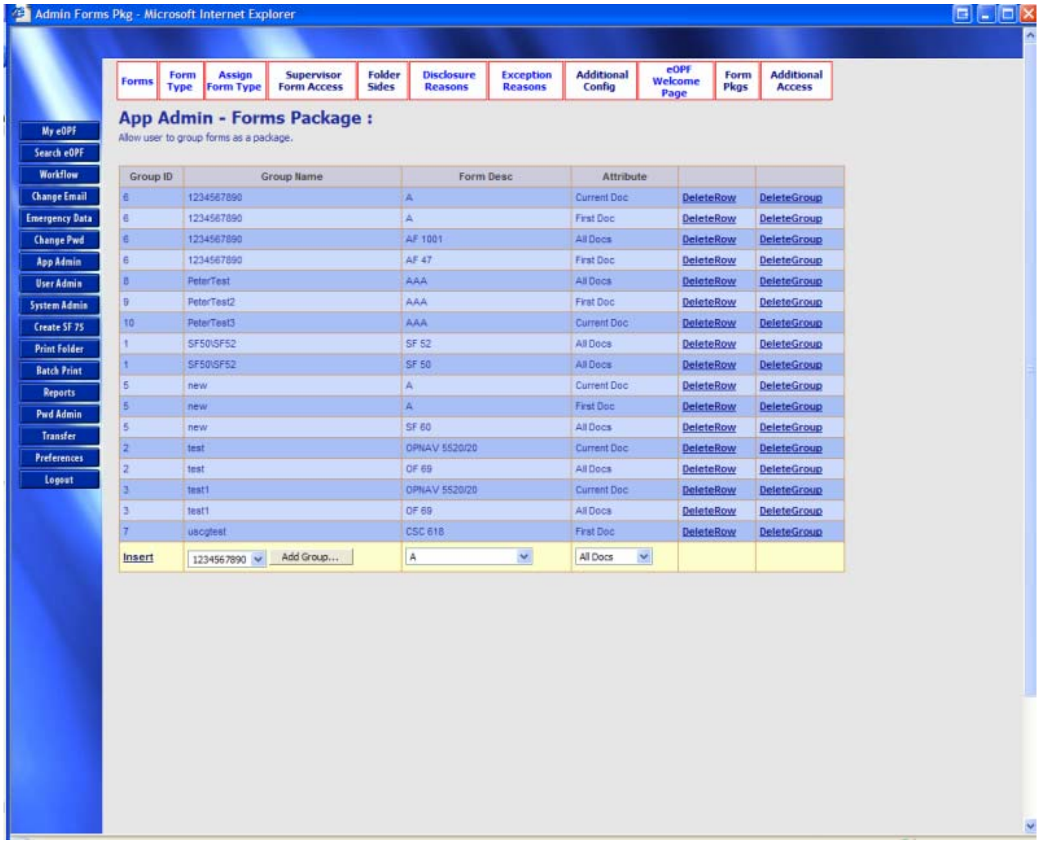
The following figure displays the ***Forms*** page.



2. Click the *Form Pkgs* tab.

The ***Forms Package*** page appears.

The following figure displays the ***Forms Package*** page.



3. Select the desired *Group Name*, *Form Desc,* and *Attribute* from the drop-down lists, then click the 

***Insert* link.**
The ***Forms Package*** page reappears with the new form package.

Note:

You can add a ***Group Name*** by clicking the 

Add Group button. Type the desired ***Group Name*** in the field located above the ***Save*** button, then click the 

Save button.

Chapter 13: Working with Form Types

As an eOPF administrator, you can add, edit, and delete a form type. Each form has one or more form types assigned to it, each of which more specifically identifies the particular document. In most cases, there is only one type, which categorizes a particular form. For example, a Form TSP 1 has only two form types, BENEFITS and EXCEPTION, associated with the document. On the other hand, the SF 50 document has many form types, which define the specifics of the objective or Nature of Action Code (NOAC) being used. As with the form description, the type description can be used as a filter for the user to search for documents within an eOPF.

Example:

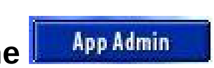
A SF 50 is the specific form. The Form Types are Promotion, Within-Grade Increase, Career Appointment, Change of Status, etc. which in the case of an SF 50 are associated to a Nature of Action (NOA). A TSP 1 form would have the Form Type of 'Benefits' associated with it.

Adding a New Form Type

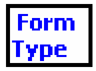
eOPF is deployed with a catalog of Form Types that have been identified by the Office of Personnel Management (OPM). A Form Type is either a Nature Of Action Code description or one of nine other common categories: Employee, Performance Appraisal, Benefits, Investigations/Security Clearance, Payroll, Contact Information, Position, Training or Exception. The EXCEPTION type is used to handle documents that have an error that prevents the document from having a proper Form Type classification. An example is a SF 50 with a NOA code that is not valid. The Form is known but not the Form Type so it is placed in to the EXCEPTION Form Type classification.

There may be an occasion that requires new categories of forms that are not already listed in eOPF. In that case, they must be added using the Add New Form Type functionality.

To Add a New Form Type:

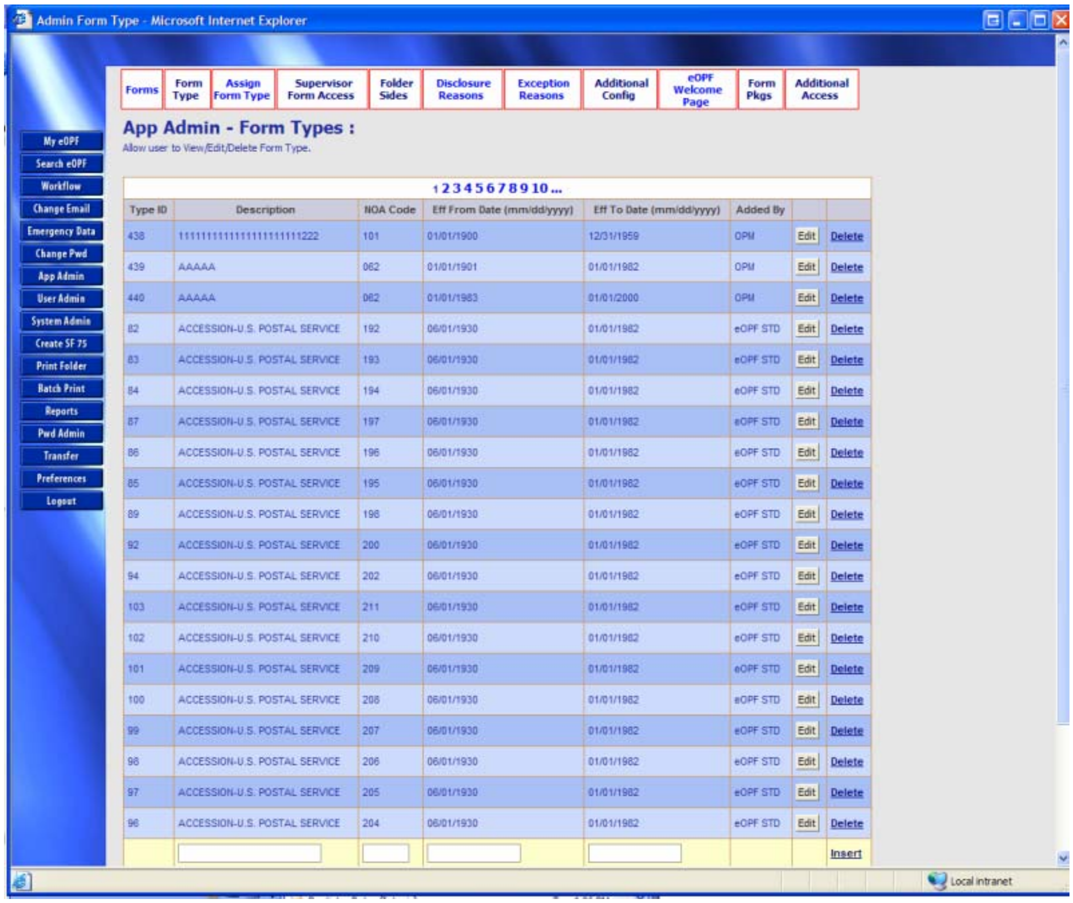
1. **From the eOPF main menu buttons, click the **

App Admin button.
The ***Forms*** tab of the ***App Admin*** page displays by default.

2. Click the  ***Form Type*** **tab.**

The ***Form Types*** page appears.

The following figure displays the ***Form Types*** page.



3. Scroll to the bottom of page to locate the *Insert* row and then type a new description in the *Description* field.

4. Enter a *Nature of Action Code* (I), if applicable. Enter the *Effective From Date* if a *NOA Code* is used.

NOA Code is a three digit, zero padded number. For example NOA Code '2' is recorded as '002'. The eOPF system will automatically zero pad entered number to three digits.

5. Enter the *Effective To Date* if you know the length of time the *NOA Code* will be valid.

Leave *Effective To Date* blank if the *NOA Code* as no ending effective date.

6. Click 

***Insert* link.**

The ***Form Types*** page reappears with the following message displayed: “Form Type is added successfully”.

Deleting a Form Type

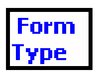
The occasion may arise where the eOPF administrator needs to delete a form type.

To Delete a Form Type:

1. From the eOPF main menu buttons, click the 

***App Admin* button.**

The *Forms* tab of the ***App Admin*** page displays by default.

2. Click 

***Form Type* tab.**

The ***Form Types*** page appears.

The following figure displays the ***Form Types*** page.

**3. Click the 

Delete link associated with the desired *Form Type*.**

The eOPF solution verifies that the selected Form Type is not joined to a form. If joined, an error message is displayed in red at the top of the Form Types list. If the Form Type is unused a delete confirmation pop-up box appears.

The following figure displays the ***Confirmation*** box.

**4. Click the 

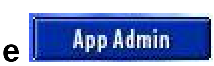
OK button.**

The ***Form Types*** page reappears with the Form Type deleted.

Associating a Form Type with an NOAC

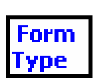
Each of the multiple form types of SF 50's are associated with a Nature of Action Code (NOAC). The OPM Guide for Processing Personnel Actions associates a numeric code with each Nature of Action. The NOAC helps eOPF interpret the data from the nightly SF 50 data feeds facilitating this additional NOAC index to enable further search filtering for the user. eOPF maintains a Form Type description that is consistent with the NOAC description from OPM. An NOAC can only be associated with one Form Type for a given timeframe.

To Associate a Form Type with an NOAC:

**1. From the eOPF main menu buttons, click the 

App Admin button.**

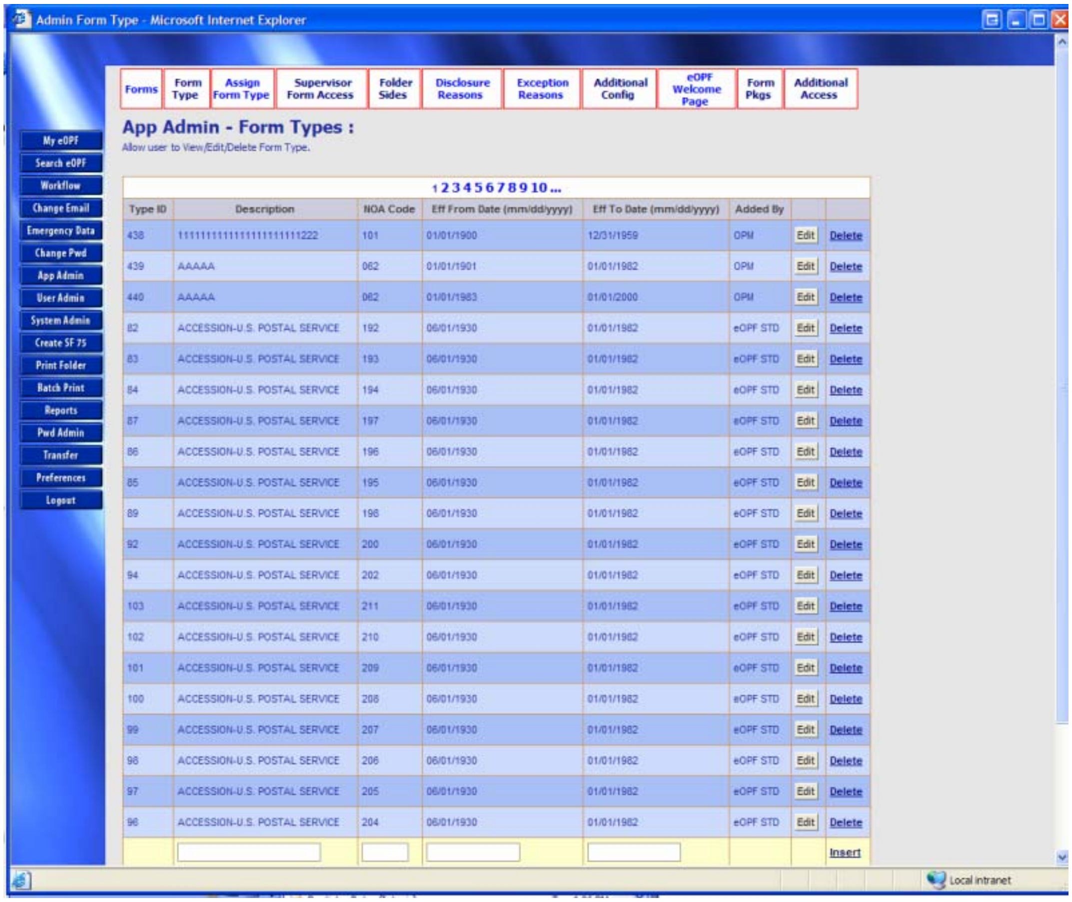
The *Forms* tab of the ***App Admin*** page displays by default.

**2. Click the 

Form Type tab.**

The ***Form Types*** page appears.

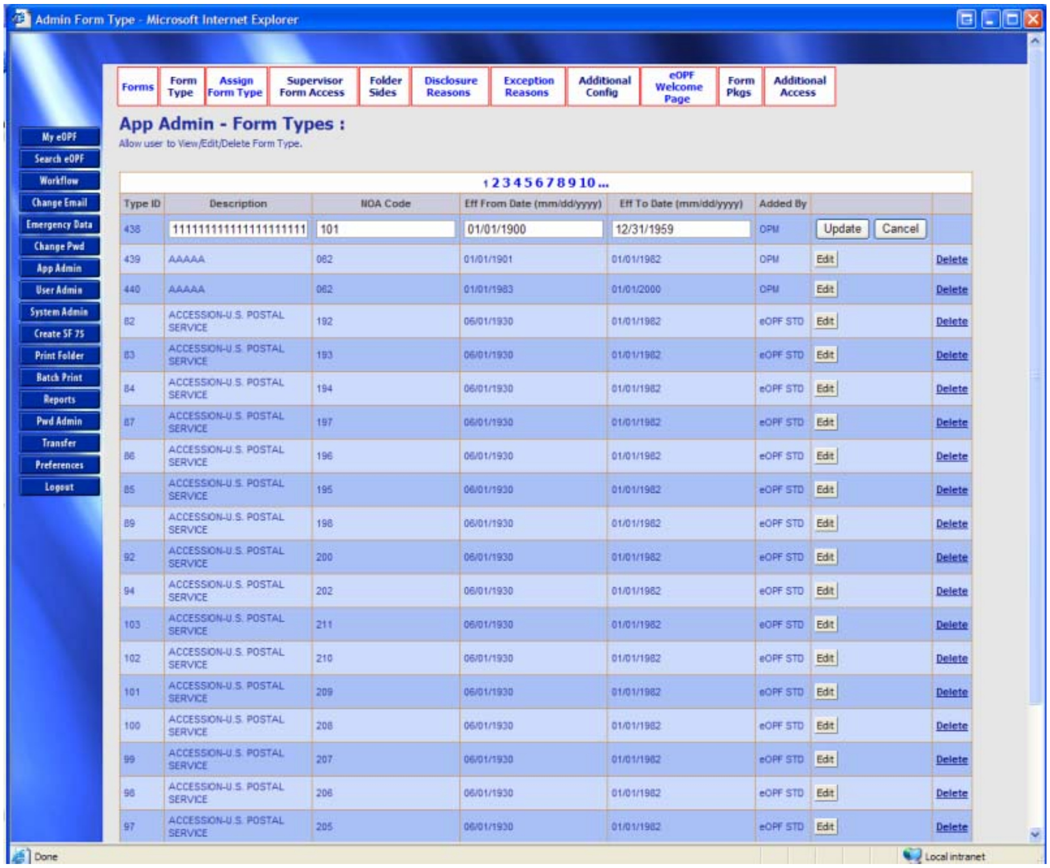
The following figure displays the ***Form Types*** page.



3. **Click the** 

***Edit* button associated with the desired *Form Type*.**
The ***Form Types*** page reappears with the fields open for editing.

The following figure displays the ***Form Types*** page with a row ready to edit.



4. **Enter the desired Nature of Action Code (NOAC) in the *NOA Code* field.**

5. **Enter Effective From Date and Effective To Date if known.**

6. **Click the Update *Update* button.**
   The ***Form Types*** page reappears with the message "**FormType ID #### is updated successfully**," where ### is the number the system assigns to the form type.

Note:
The ***Form Type ID*** is assigned by eOPF.

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7. **To return to the *Form Type* page without associating a Form Type with an NOAC, click the Cancel *Cancel* button.**

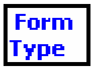
Removing a Form Type's NOAC Association

As an eOPF administrator, there may be times when you need to remove a Form Type's NOAC association. An NOAC association could have been created in error or the NOAC association could have changed.

To Remove a Form Type's NOAC Association:

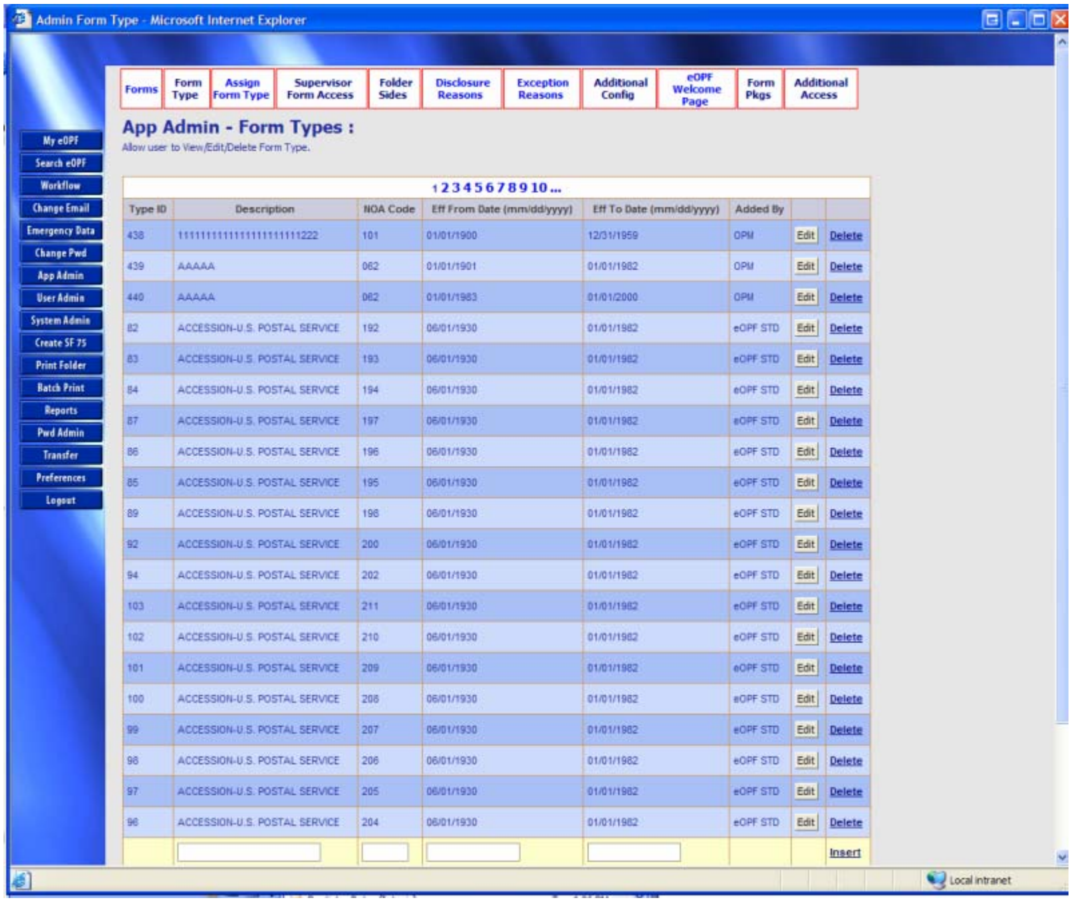
1. **From the eOPF main menu buttons, click the** 

***App Admin* button.**
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the** 

***Form Type* tab.**
The ***Form Types*** page appears.

The following figure displays the ***Form Types*** page.



3. **Click the Delete *Delete* link associated with the desired Form Type.**
   If the Form Type is not joined to a Form then the delete confirmation pop-up box appears; otherwise, an error message appears in red asking you to remove the Form to Form Type link.

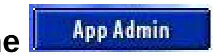
The following figure displays the ***Confirmation*** box.

4. **Click the OK *OK* button to complete the record deletion.**

5. **Click the Cancel *Cancel* button to abort the deletion.**

   The *Form Types* page reappears with the selected Form Type deleted.

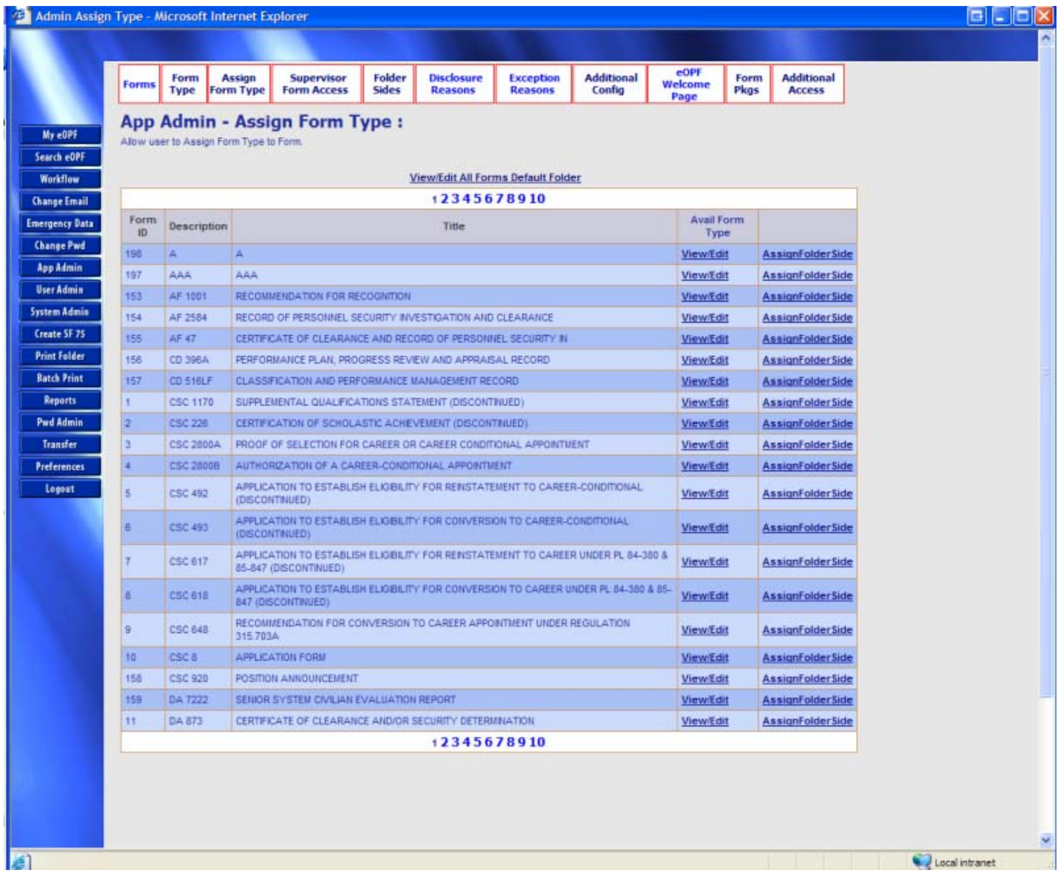
Assigning and Editing a Form Type to a Form

1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the _Assign Form Type_ tab.**
The ***Assign Form Type*** page appears.

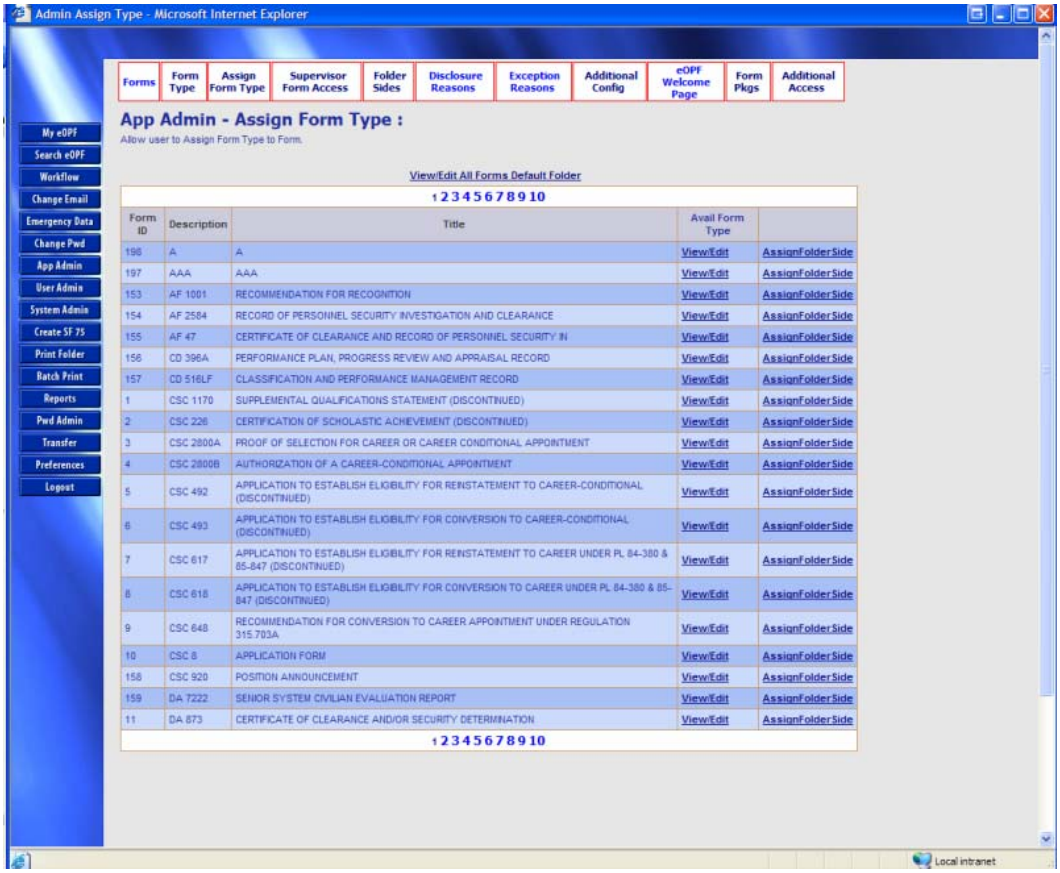
The following figure displays the ***Assign Form Type*** page.



3. **Click the** 

View/Edit link associated with the desired Form.
The Assign Form Type→View/Edit Avail Form Types for Form page appears.

The following figure displays the Assign Form Type→View/Edit Avail Form Types for Form page.



4. Select the appropriate checkboxes and click the 

***Save* button located at the button of the list.**

The Assign Form Type→View/Edit Avail Form Types for Form page appears.

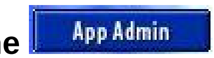
5. To exit the *Assign Form Type→View/Edit Avail Form Types for Form* page, click on the *Cancel* button located at the bottom of the list.

Assigning a Side-by-Side Form Relationship

This capability is provided to allow you to assign a Side-by-Side form assignment. Only HR Specialists have the ability to display forms side-by-side. This can only be done when viewing a document from a search result list and clicking on the side-by-side icon for the document. The side-by-side icon is only visible for forms that have a side-by-side partner form defined. This section of the manual describes how to create the side-by-side partnership.

For example, you may want to set up the capability to display an SF 50 next to an SF 52 to verify common data. The Side-by-Side relationship can be set at the Form-Form Type assignment level. In other words, an SF 50 with a TYPE of NOA Code 894 may have a side-by-side form partner that is different than an SF 50 with a TYPE of NOA Code 893.

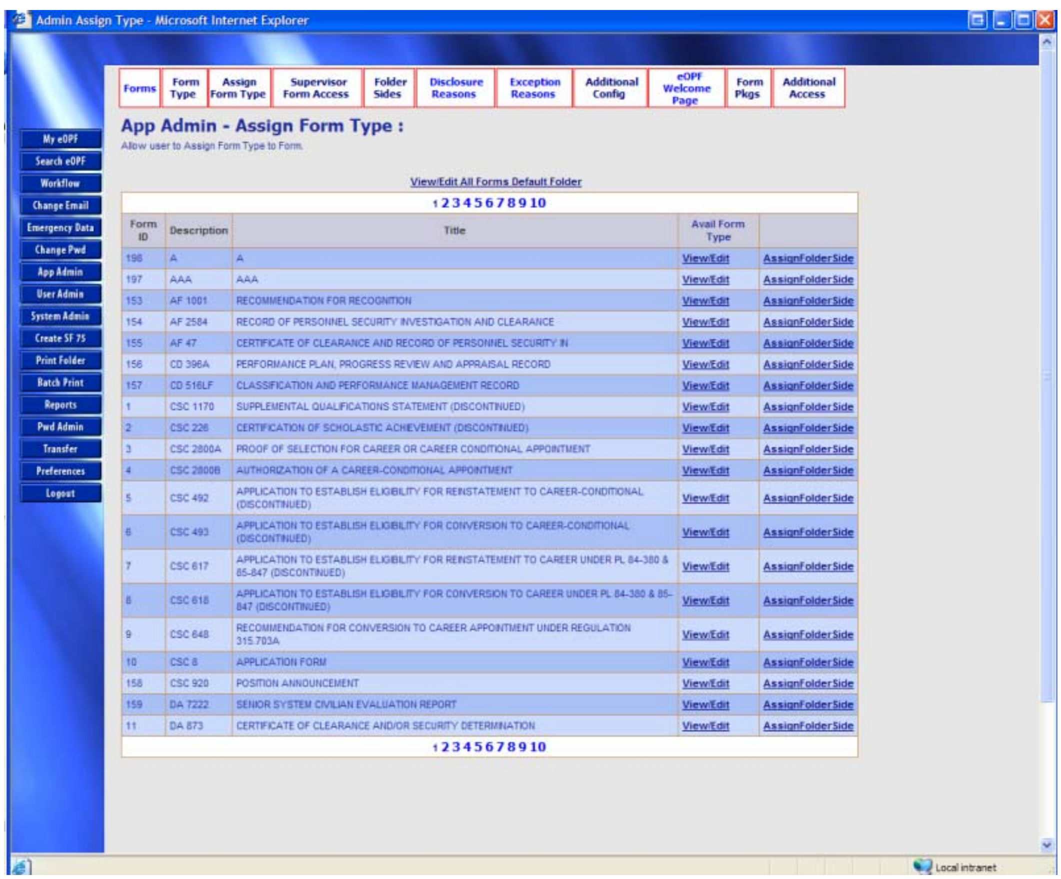
To Assign a Side-by-Side Form Relationship:

1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the _Assign Form Type_ tab.**
The ***Assign Form Type*** page appears.

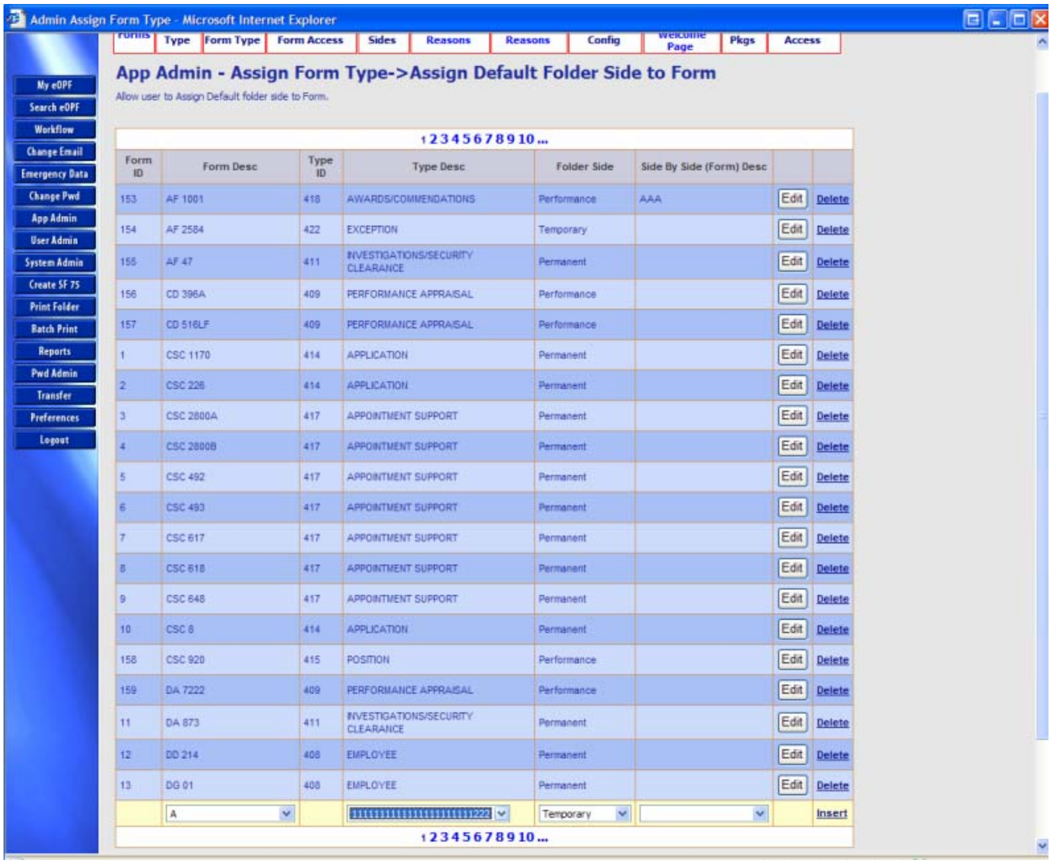
The following figure displays the ***Assign Form Type*** page.



3. **Click the _View/Edit All Forms Default Folder_ link found above the displayed list of forms.**
The *Assign Form Type→Assign Default Folder Side to Form* page appears. Each form is listed along with a type description, default

folder side, and side-by-side form id. Forms may not have a side-by-side form id.

The following figure displays the Assign Form Type→Assign Default Folder Side to Form page.



4. **Scroll to the bottom of the list and enter data for the new form and type combination you want to set up.**
   If you are modifying an existing combination you must first delete the existing combination and then insert the new combination.

5. **Pick the *Form*, *Type*, and *Default Side* from the presented drop-down lists.**

6. **Select the existing form you want to associate with the form you are currently inserting into the list.**
   The drop down list provides a list of all available forms.

7. **Click on the *Insert* link after you enter all the desired data.**
   The page refreshes with the message that the ‘Side is added to form successfully’.

8. **To exit the *Assign Form Type→Assign Default Folder Side to Form* page, click on the *Back* button located at the bottom of the list or click on one of the eOPF main menu buttons.**

Chapter 14: Additional Configuration

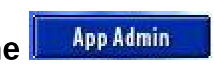
Multiple tabs support a variety of items that can be managed by the eOPF Application Administrator. The ‘Folder Sides’ tab allows the Application administrator to manage the naming of additional folder sides. The ‘Disclosure Reasons’ tab allows the Application Administrator to manage the drop down list of reason users select when performing actions on an OPF. The ‘Additional Config’ tab allows the application administrator to manage web banner text and whether Supervisor Role is activated system wide.

Working with Disclosure Reasons

Users who are granted access to view folders and documents for someone other than themselves must enter a *Reason* why they are viewing the folder. These disclosure reasons are logged each time a document is viewed.

The *Admin Tool* described below provides the eOPF administrator with the capability to add, modify or delete the disclosure reason that will be provided in a drop-down list for the eOPF users.

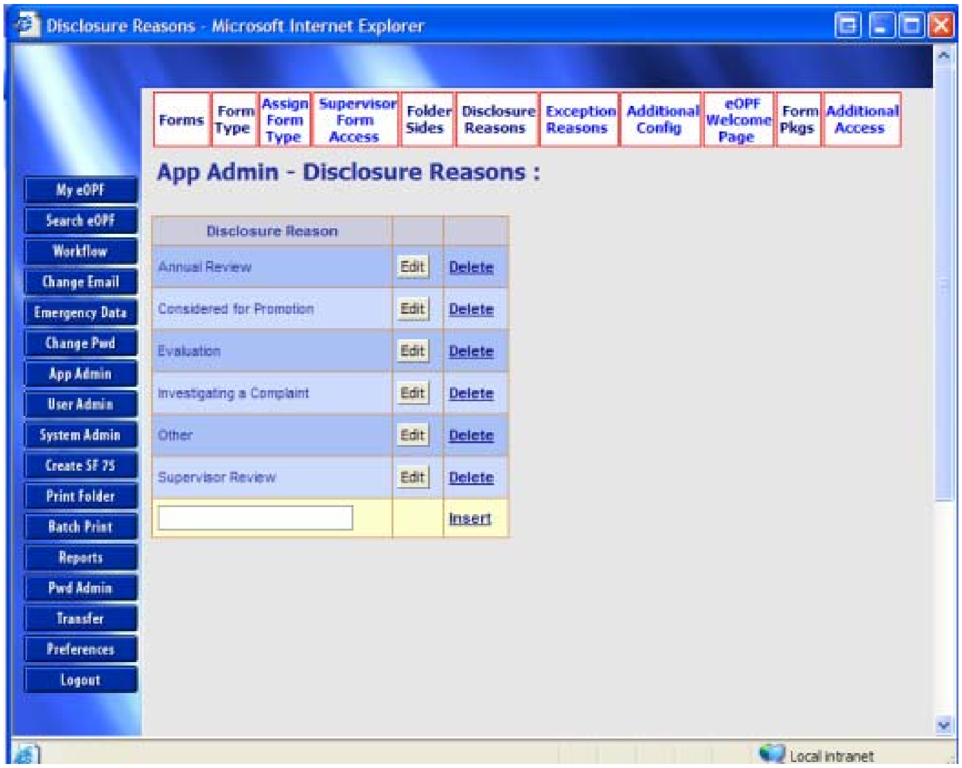
To Add, Modify, or Delete a Disclosure Reason:

1. **From the eOPF main menu buttons, click the** 

   ***App Admin* button.**
   The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the *Disclosure Reasons* tab at the top of the page.**
   The ***Disclosure Reasons*** page appears.

The following figure displays the ***Disclosure Reasons*** page.

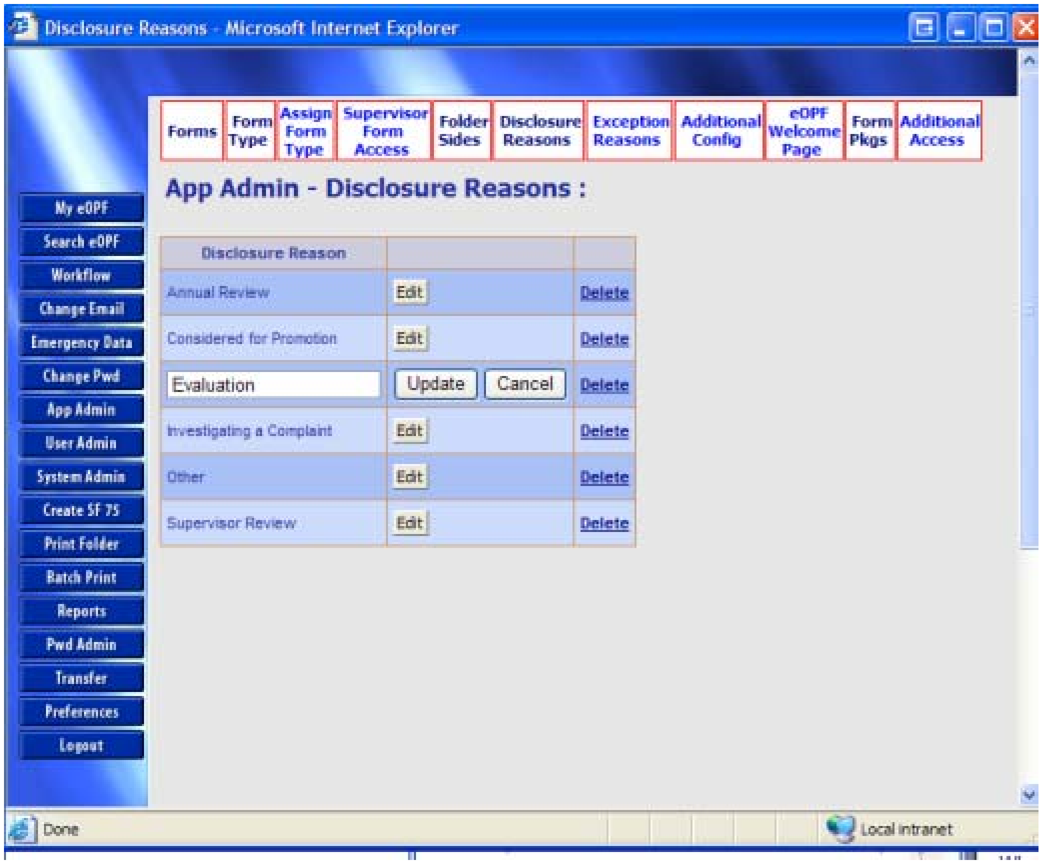


3. **To add a *Disclosure Reason*, enter the text in the text box available at the bottom of the existing *Disclosure Reason* list.**

4. **Click the**  ***Insert*** **link.**
The ***Disclosure Reasons*** page reappears with the message "Disclosure reason is added successfully."

5. **To edit an existing *Disclosure Reason*, click the**  ***Edit*** **button next to the particular *Disclosure Reason* to be changed.**

The following figure displays a ***Disclosure Reason*** row in edit mode.



6. **Modify the text accordingly and click** 

Update **button or to revert back to the original text, click the** 

Cancel **button.**
   The Additional Configuration page appears with the Disclosure Reason updated.

7. **To delete the existing *Disclosure Reason*, click the** 

Delete **Link associated with the desired *Disclosure Reason*.**
   The *Confirmation* pop-up box appears.

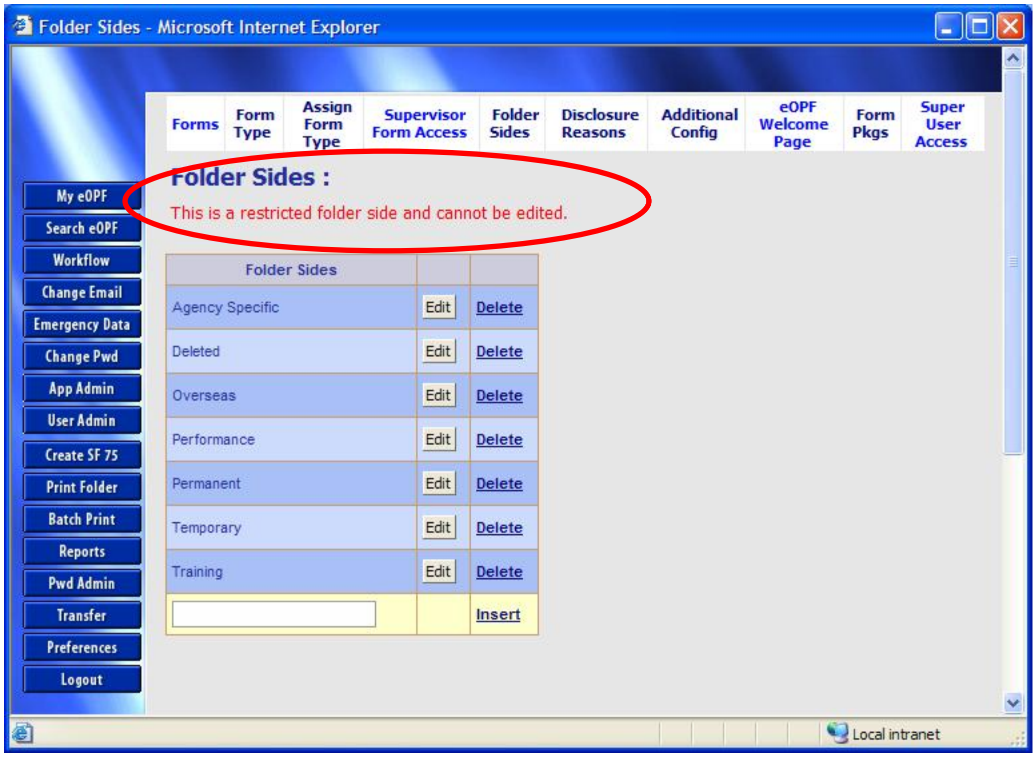
The following figure displays the ***Confirmation*** box.

8. **Click the**  ***OK* button to delete the record.**

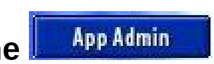
9. **Click the**  ***Cancel* button to abort the delete process.**
   The ***Disclosure Reasons*** page reappears with the *Disclosure Reason* deleted.

Working with Folder Sides

Virtual Folder Sides can be defined by the agency to help group documents within an eOPF. Each document placed into an eOPF must be placed into a specific side. Many of the forms have default folder sides already defined when the eOPF solution is deployed. The Folder Sides feature found on this tab allows the eOPF administrator to add additional sides that may support agency specific forms. Once a folder side has been used as a document attribute it cannot be edited or deleted. Certain folder sides have been defined by OPM and cannot be altered. For example, Temporary and Permanent folder side titles can not be changed. A message is displayed if you try to change a restricted folder.



To Add, Modify or Delete the Folder Sides:

1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the _Folder Sides_ tab at the top of the page.**
The ***Folder Sides*** page appears.

The following figure displays the ***Folder Sides*** page.

3. To add a *Folder Side*, enter the text in the text box available at the bottom of the existing *Folder Side* list.

4. Click the <u>*Insert*</u> Link.

The ***Folder Sides*** page reappears with the message “Successfully added side.”

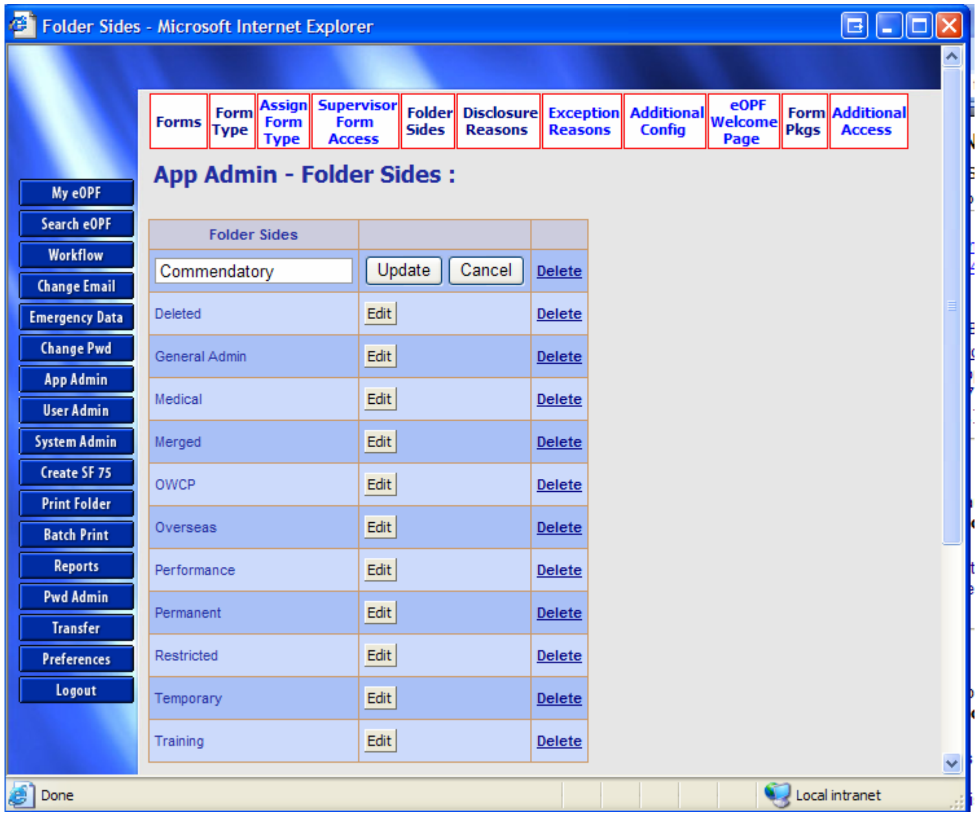
Note:

Once a ***Folder Side*** is created it must be assigned to a group to become visible to users. Click on the ***Security Access*** tab found under User Admin button. Select a group and check the new folder side to make it available to the selected group.

---

5. To edit an existing *Folder Side*, click the *Edit* button next to the desired *Folder Side* to be changed.

The following figure displays a ***Folder Side*** row in edit mode.



Note:

Certain folder side titles can not be altered as they are part of a set of restricted folder sides that all eOPF applications must use based on standards establish by OPM.

---

6. **Modify the text accordingly and click Update *Update* button or to revert back to the original text, click the Cancel *Cancel* button.**
   The ***Folder Sides*** page appears with the *Folder Side* updated.

7. **To delete the existing *Folder Side*, click the Delete *Delete* link associated with the desired Folder Side.**
   The *Confirmation* pop-up box appears.

The following figure displays the ***Confirmation*** box.

8. **Click the  *OK* button to delete the record.**

9. **Click the  *Cancel* button to abort the delete process.**
   The ***Folder Sides*** page reappears with the *Folder Side* deleted.

Changing the Web Banner

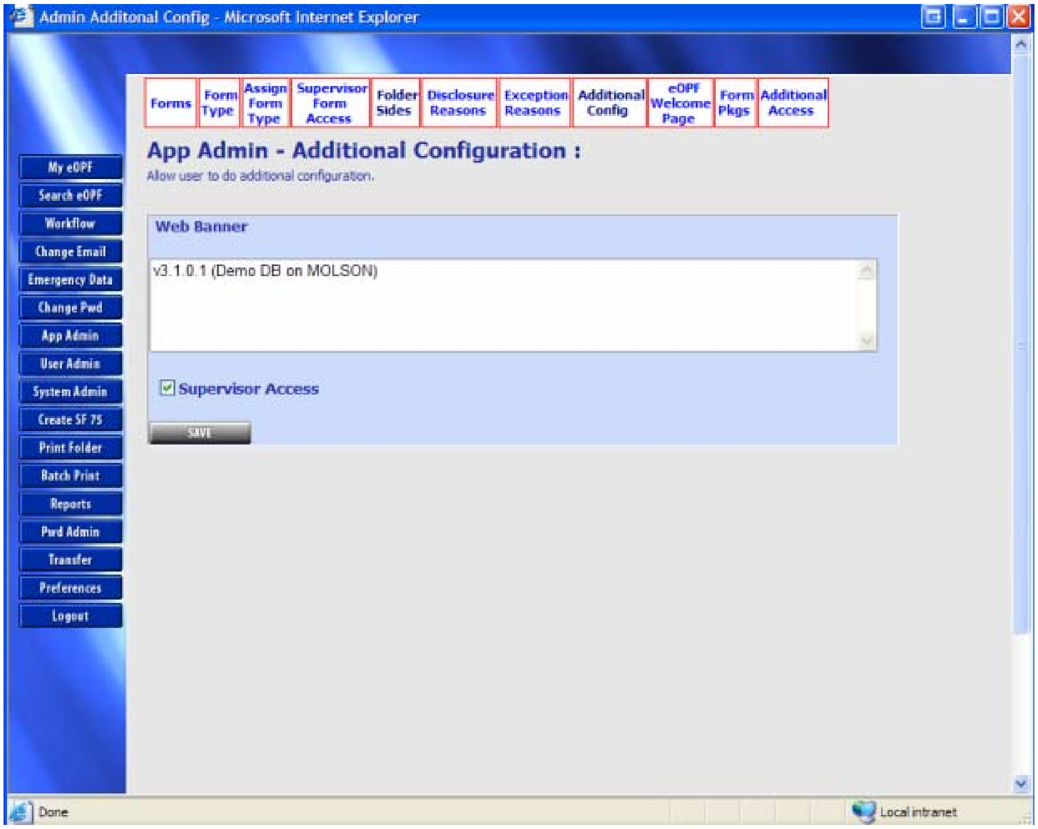
The web banner is a message that appears on the *eOPF Login* page. The eOPF administrator can enter or modify this message at any time and the new message will appear from that point forward for all users logging into the eOPF solution.

To Change the Web Banner:

1. **From the eOPF main menu buttons, click the  *App Admin* button.**
   The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the *Additional Config* tab at the top of the page.**
   The Additional Configuration page appears.

The following figure displays the ***Additional Configuration*** page.



3. Enter the message text that you wish to appear on the *eOPF Login* page.

4. Click the 

***Save* button.**

A message indicating successful update of the web banner is displayed.

Note:

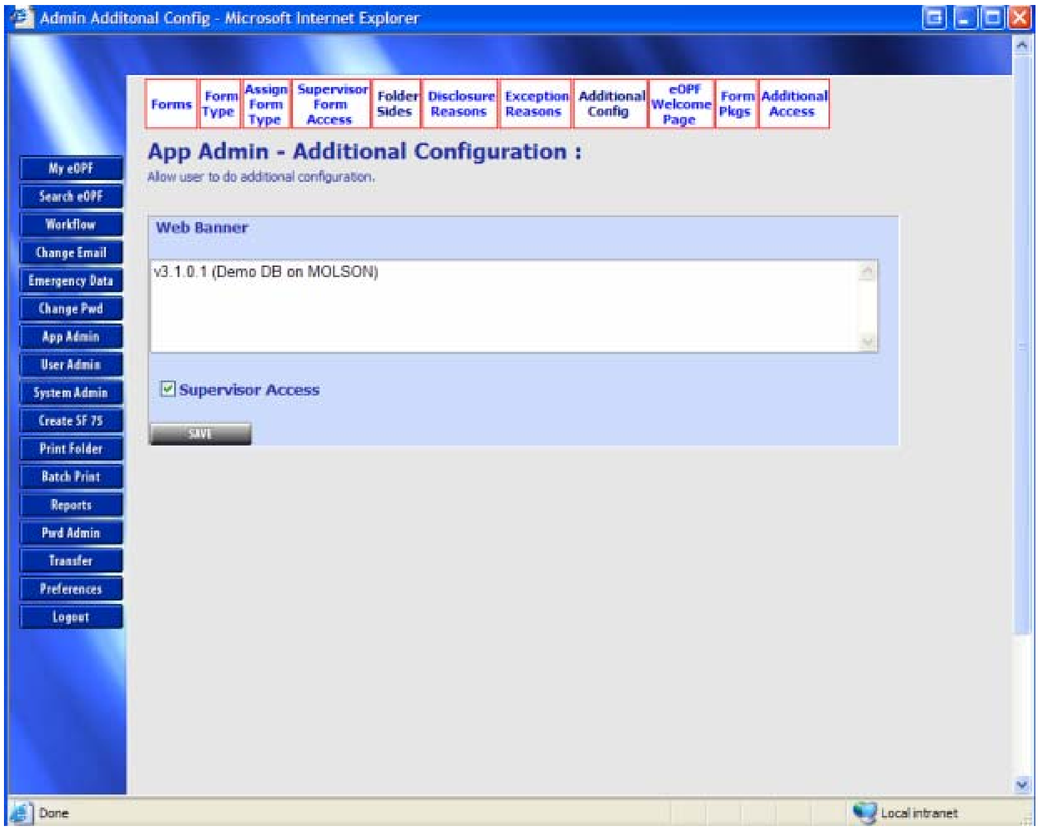
The web banner on the opening ***eOPF Login*** page is configurable by eOPF instance using the Additional Config tab found in ***App Admin****;* therefore, employees will only see the banner for their particular eOPF instance.

Globally Enabling or Disabling Supervisor Access

eOPF provides the capability for supervisors to have rights to view subordinates' documents. Section 15.3 describes how the eOPF administrator can limit this access to specific forms. If desired, the eOPF administrator can deny supervisors access to their subordinates' records by turning off the *Supervisor Access*.

On the ***Additional Configuration*** page, below the *Web Banner* text box there is a checkbox, labeled *Supervisor Access*. By default, this is checked, thus enabling supervisor access to reporting employees' eOPFs based on the Supervisors Personnel Office Identifier (PO ID), Activity Code, and Organization Code.

The following figure displays the ***Additional Configuration*** page with the ***Supervisor Access*** checkbox enabled.



To disable supervisor access, uncheck the box to the left of the Supervisor Access label and click the  ***Save*** button. A message indicating successful update of the *Supervisor Access* is displayed.

Chapter 15: Handling Security Access

eOPF administrators, defined as 'User Administrators', have the ability to grant or deny access to functionality and to folders by Group. They may also create a new group using the eOPF User Group Manager found under the User Admin button on the main eOPF button menu. This button is only visible if you have been granted access to it.

Note:

Groups are defined using the User Group Manager tab found under the User Admin button. This button is only visible if you have access to it. The eOPF administrator will work with the eOPF support administrator to define the appropriate group definitions. Each Agency may define and load Groups into eOPF because the Agencies may assign the business processes differently from each other.

Managing eOPF User Groups

Groups are defined using the User Group Manager tab found under the User Admin button. This button is only visible if you have access to it.

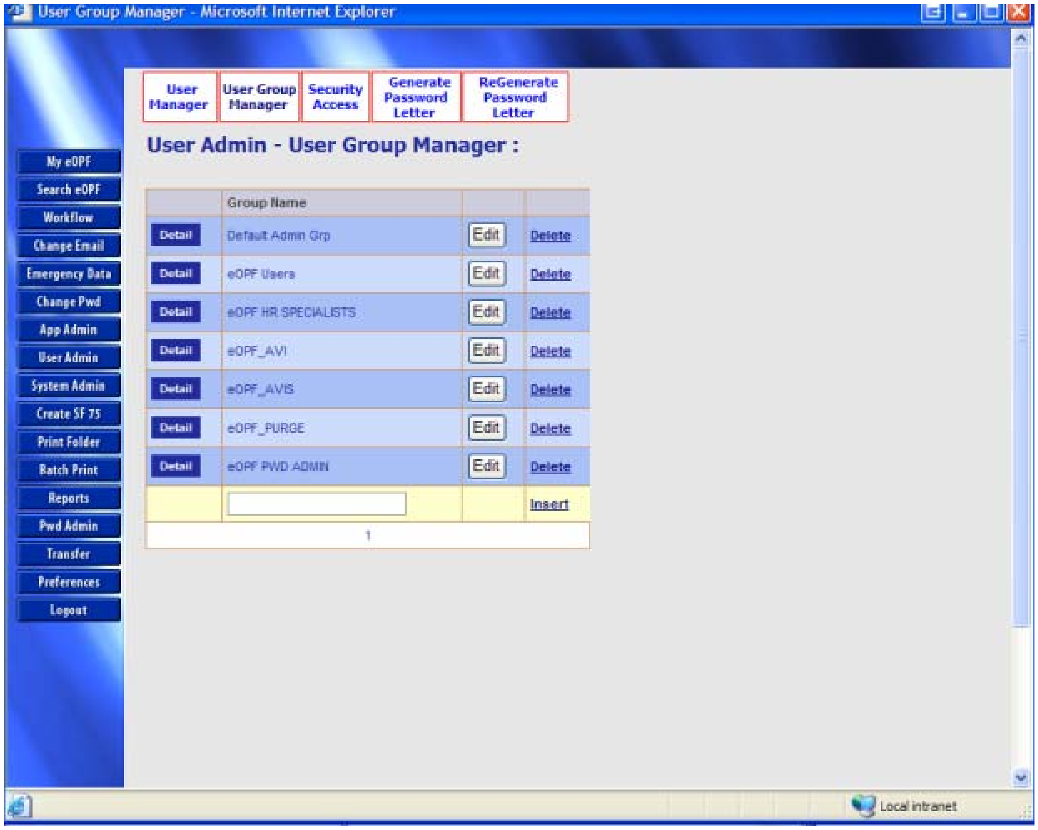
To Manage eOPF User Groups:

1. **From the eOPF main menu buttons, click the** 

User Admin button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. **Click the _User Group Manager_ tab at the top of the page.**
The ***User Group Manager*** page appears.

The following figure displays the ***User Group Manager*** page.



3. To add a User Group, enter the text in the text box available at the bottom of the existing User Group list.

4. Click the  ***Insert* Link.**

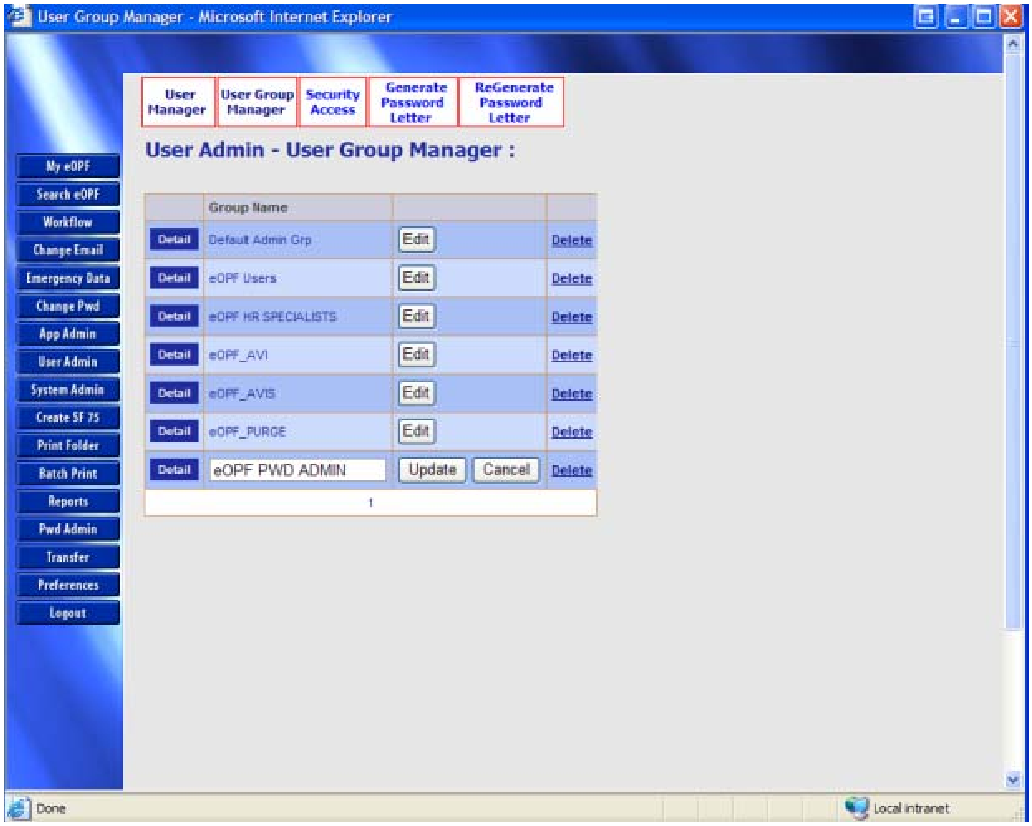
The ***User Group*** page reappears with the message "Successfully added group."

Note:

Once a ***User Group*** is created it must be assigned access to features and folders sides. Click on the ***Security Access*** tab found under User Admin button. Select the new group and check the desired folder sides and functions to make it available to the selected group.

5. To edit an existing *User Group*, click the  ***Edit* button next to the desired *User Group* to be changed.**

The following figure displays a ***User Group*** row in edit mode.



Note:

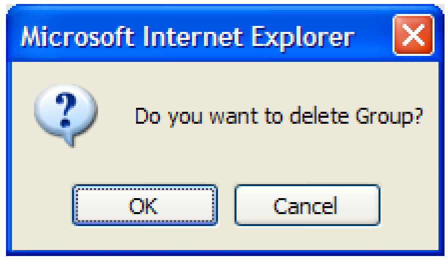
Certain User Groups can not be altered as they are part of a set of restricted User Groups that all eOPF applications must use based on standards establish by OPM.

---

6. **Modify the text accordingly and click**  ***Update*** **button or to revert back to the original text, click the**  ***Cancel*** **button.**
   The ***User Group Manager*** page appears with the *User Group* updated.

7. **To delete the existing *User Group*, click the**  ***Delete*** **link associated with the desired User Group.**
   The *Confirmation* pop-up box appears.

The following figure displays the ***Confirmation*** box.



8. Click the  ***OK* button to delete the record.**

9. Click the  ***Cancel* button to abort the delete process.**
The ***User Group Manager*** page reappears with the *User Group* deleted.

Granting Access to Functionality

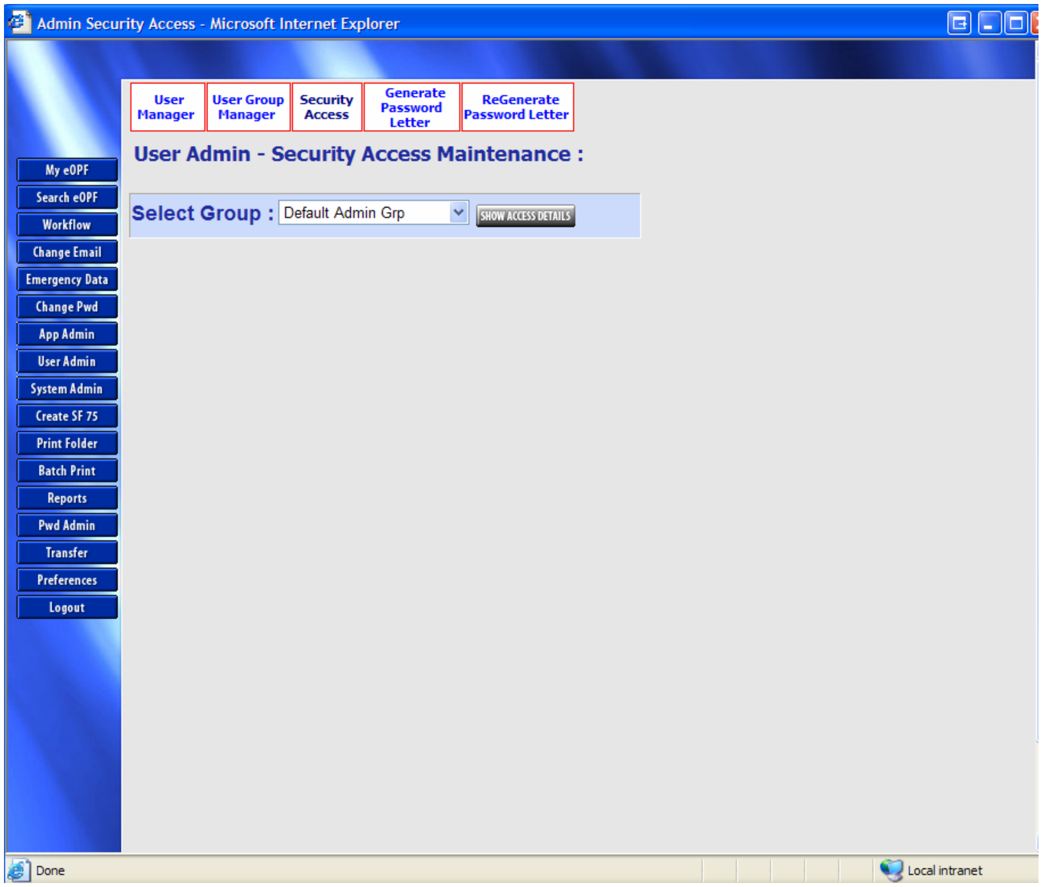
In order to grant access to functionality, you must choose a group and then assign functional permissions to the group.

To Grant Access to Functionality:

1. From the eOPF main menu buttons, click the  ***User Admin* button.**
The *User Manager* tab of the ***User Admin*** page displays by default.

2. Click the *Security Access* tab at the top of the page.
The ***Security Access Maintenance*** page appears.

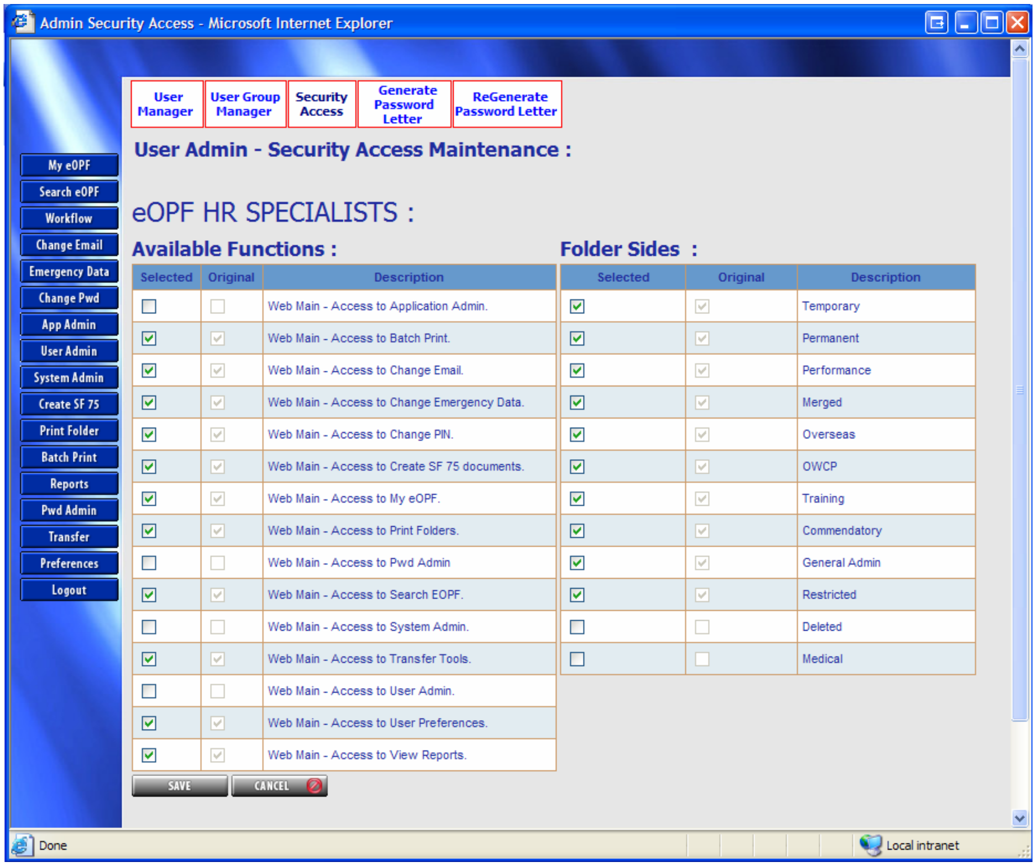
The following figure displays the ***Security Access Maintenance*** page.

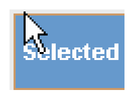


3. **Select the *Group* from the *Select Groups* drop-down box and click the** 

***Show Access Details* button.**
The Available Functions and Folder Sidess page appears.

The following figure displays the ***Available Functions and Folder Sides*** page.



4. Under the *Available Functions* list, in the  ***Selected* column, check or uncheck the box next to the function that is to be granted or denied access for the selected group.**

5. When you finish, click the  ***Save* button at the bottom of the page.**
A message indicating successful update is displayed.

Granting Access to Folders

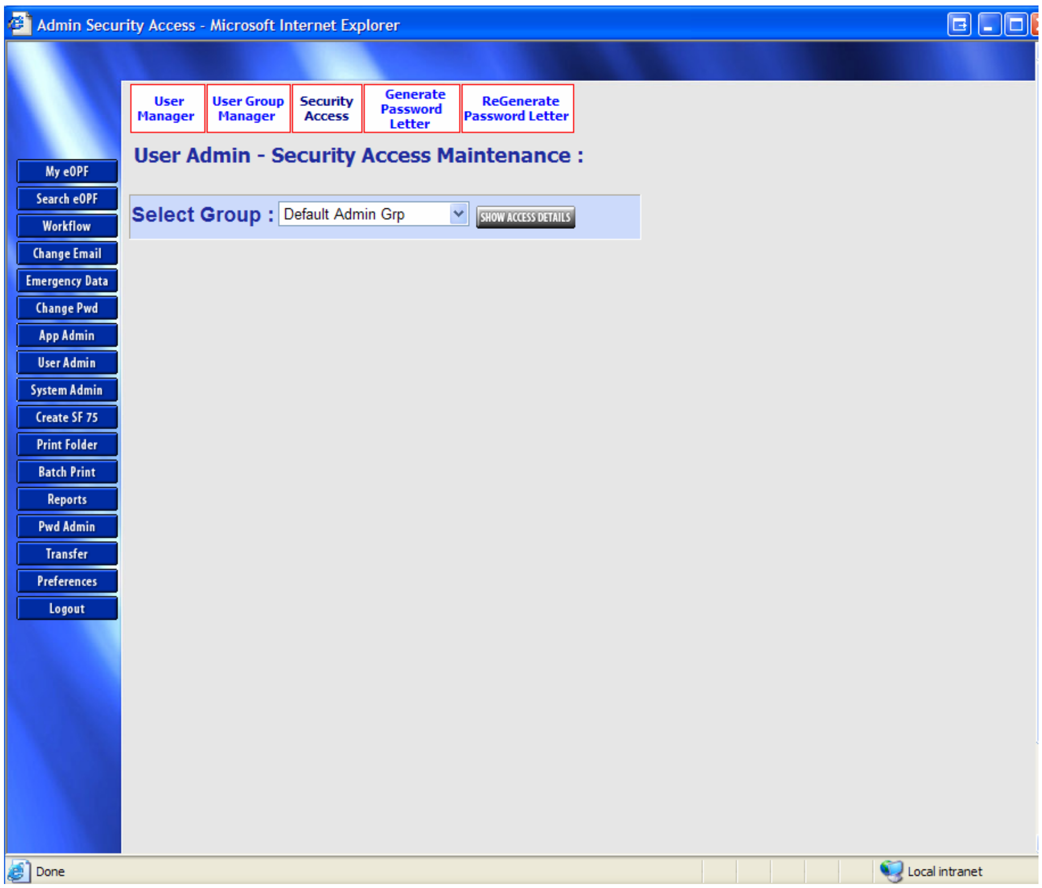
In order to grant a group access to one or more OPF folder side(s), you must choose a group and then assign folder access to the group.

To Grant Access to Folders:

1. **From the eOPF main menu buttons, click the**  ***User Admin*** **button.**
   The *User Manager* tab of the ***User Admin*** page displays by default.

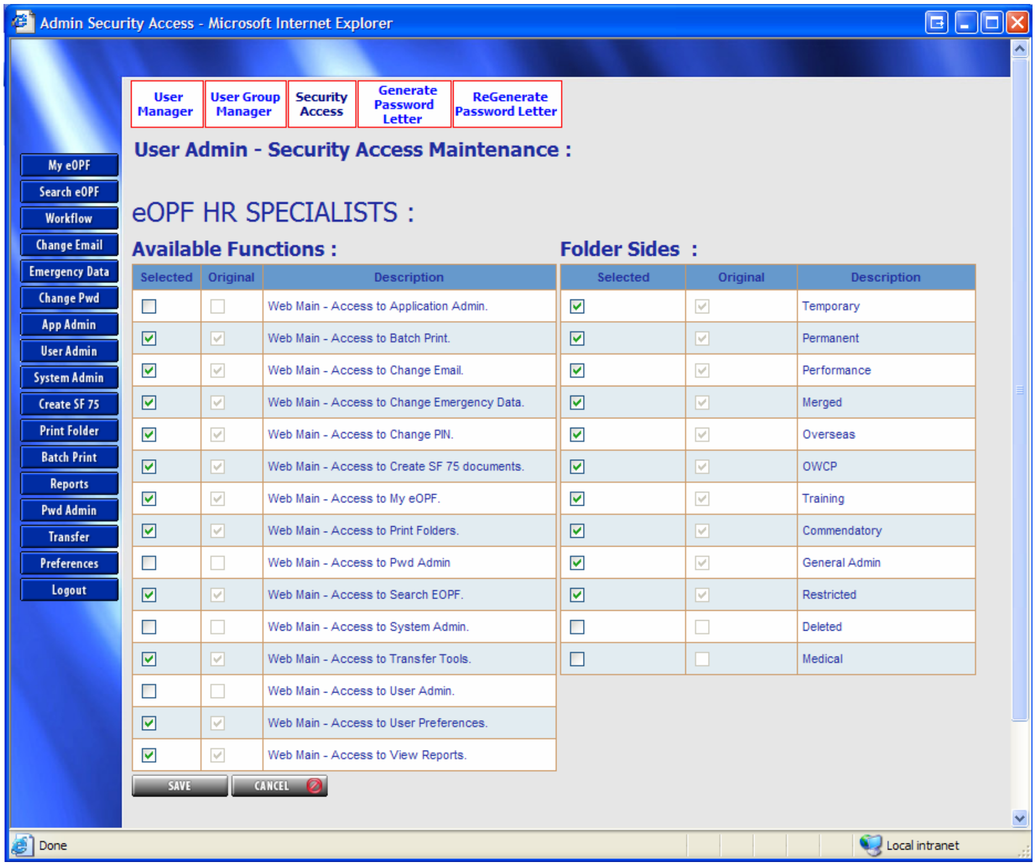
2. **Click the *Security Access* tab at the top of the page.**
   The ***Security Access Maintenance*** page appears.

The following figure displays the ***Security Access Maintenance*** page.



3. **Select the *Group* from the *Select Groups* drop-down box and click the**  ***Show Access Details*** **button.**
   The Available Functions and Folder Sidess page appears.

The following figure displays the ***Available Functions and Folder Sides*** page.



4. **On the right half of the *Security Access Maintenance* page, under the *Folder Sides* list, in the** 

Selected **column, check or uncheck the box next to the folder(s) that are to be made available or unavailable to the *Group* selected.**

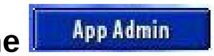
5. **When you finish, click the** 

Save **button at the bottom of the page.**
A message indicating successful update is displayed.

Granting or Denying Supervisor-View Access to Specific Forms

Supervisors are granted access to view documents in folders belonging to their subordinates. eOPF provides the *Admin Tool* to deny access to specific documents.

To Grant or Deny Supervisor Access to Specific Forms:

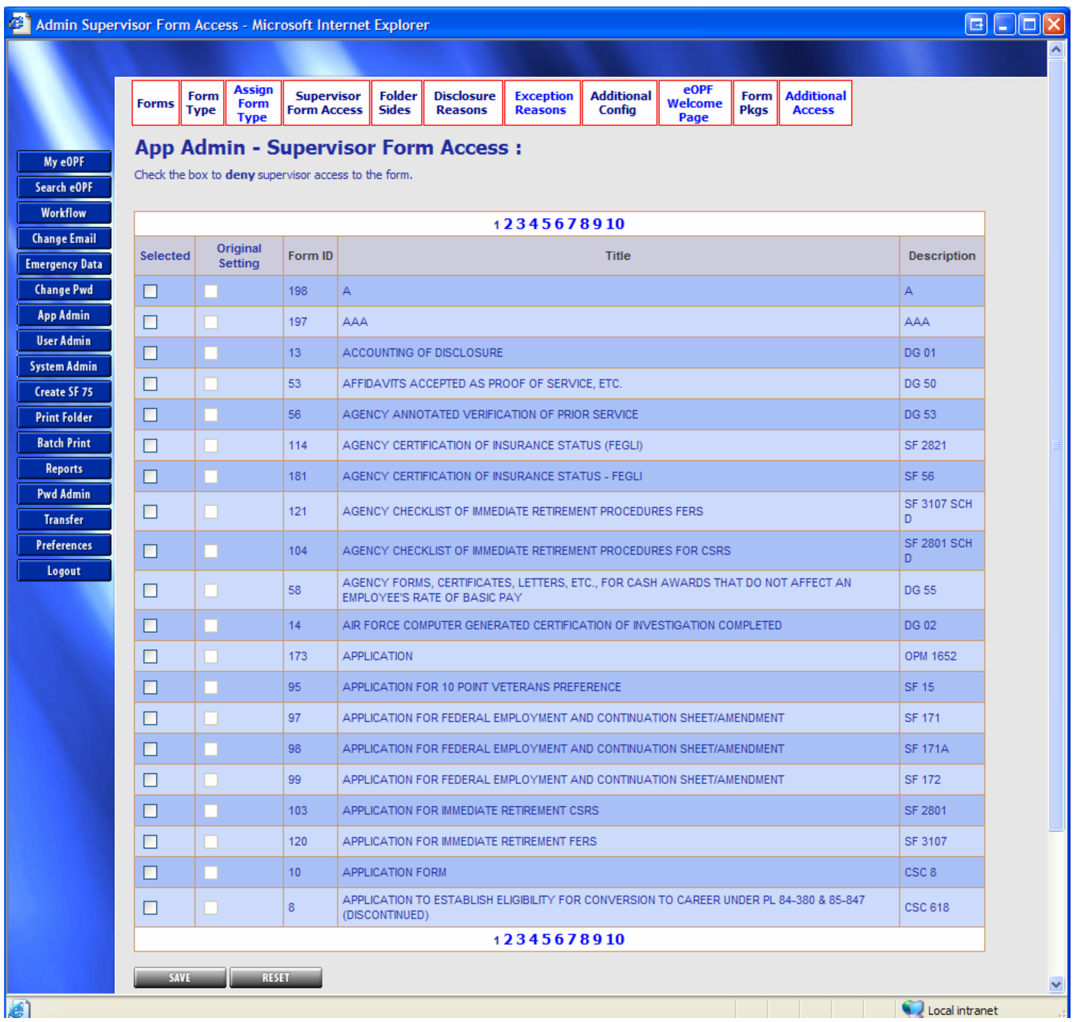
1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the** 

Supervisor Form Access tab.
The ***Supervisor Form Access*** page appears.

The following figure displays the ***Supervisor Form Access*** page.



3. **Select or deselect the checkboxes associated with the forms or documents to which the supervisor should have access.**

4. **When complete, click the** 

Save button.
The ***Supervisor Form Access*** page reappears with the message "Supervisor access permission is updated successfully."

Chapter 16: Viewing and Updating User Information

Sometimes you may need to gather additional data on an employee, such as his or her PO ID, address, or Duty Station. eOPF can retrieve this data for a given user in one centralized window.

Most employee data is imported into eOPF from external HR systems. If you view data that you know to be incorrect, please contact your eOPF Functional Administrator to request a modification to the user data.

Creating an Employee User Access Account

eOPF accounts are linked to the appropriate employee record according to SSN. Employee records are created based on information that eOPF obtains from automated employee data feeds that run typically on a bi-weekly basis. When a new employee appears in the data feed, the eOPF process will use that information to create a new user and a new folder in eOPF for that employee.

Whether an employee is a supervisor, a super user, and/or a member of the HR Specialist User Group drives the search capability the employee has in the eOPF application.

Supervisor	HR Specialist Group	Superuser	Search Capability
X			Supervisor
	X		HR Specialist
X	X		HR Specialist
	X	X	HR Specialist
X	X	X	HR Specialist
			Employee

There may be occasions, where personnel who do not have information in the employee data feed (contractor), but are supervisors of employees, that a User record needs to be added manually. The following section provides step-by-step instructions for creating an employee record. This functionality is provided to a select group of eOPF administrators. You may also create a user that has access to eOPF for a limited amount of time by using the ‘Active Start Date’ and ‘Active End Date’ fields.

Note (IMPORTANT):

To Add Documents, Modify Documents, Delete Documents, Annotate Documents, and Modify Document index information an employee must be a member of the eOPF_AVI user group. If the employee will also scan documents then he/she must be a member of the eOPF_AVIS user group. Membership in these groups should be limited to users that are HR Specialist and are members of the HR Specialist group. To purge documents from the eOPF repository a user must be a member of the eOPF_PURGE group. Any user that is performing Admin functions must be a member of the default admin group. This group can be limited in privileges and other groups created to manage admin access, however, membership in the default admin group triggers certain connection privileges that allow an administrator to perform activities.

The following steps create a user account only. They do not create an eOPF (Folder).

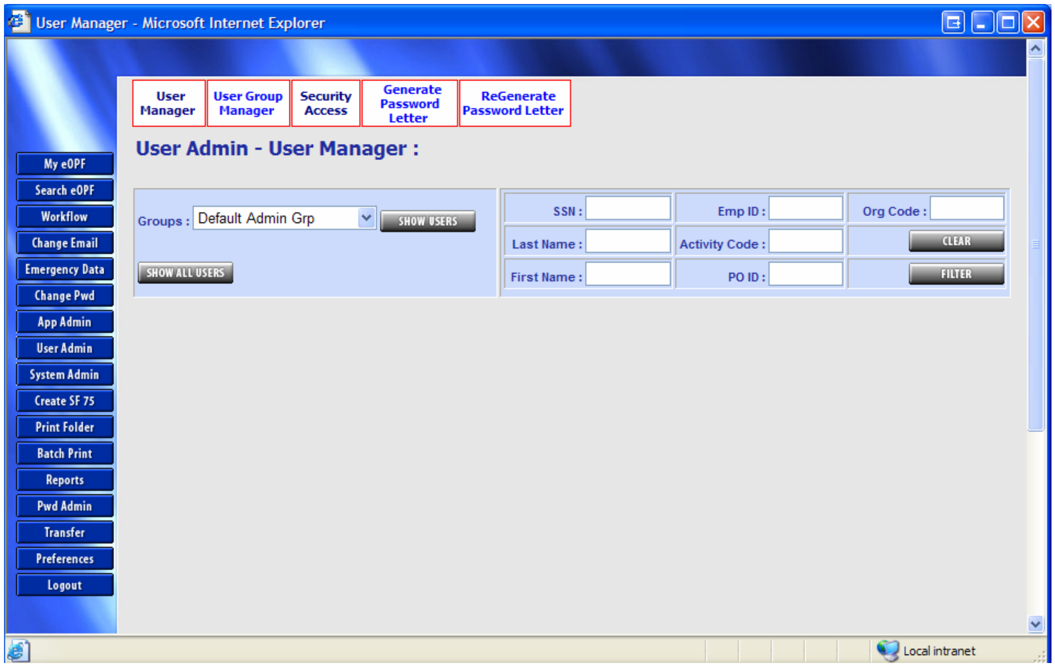
To Create a User Account:

1. **From the eOPF main menu buttons, click the** 

   ***User Admin* button.**
   The *User Manager* tab of the ***User Admin*** page displays by default.

2. **If not on the User Manager tab, click the *User Manager* tab.**
   The ***User Manager*** page appears.

The following figure displays the ***User Manager*** page.



3. **To verify that the employee has not been created, enter the new employee's *SSN*.**

Note:

The 

Filter button does not include the selected group shown in drop-down group list when executing the search. The 

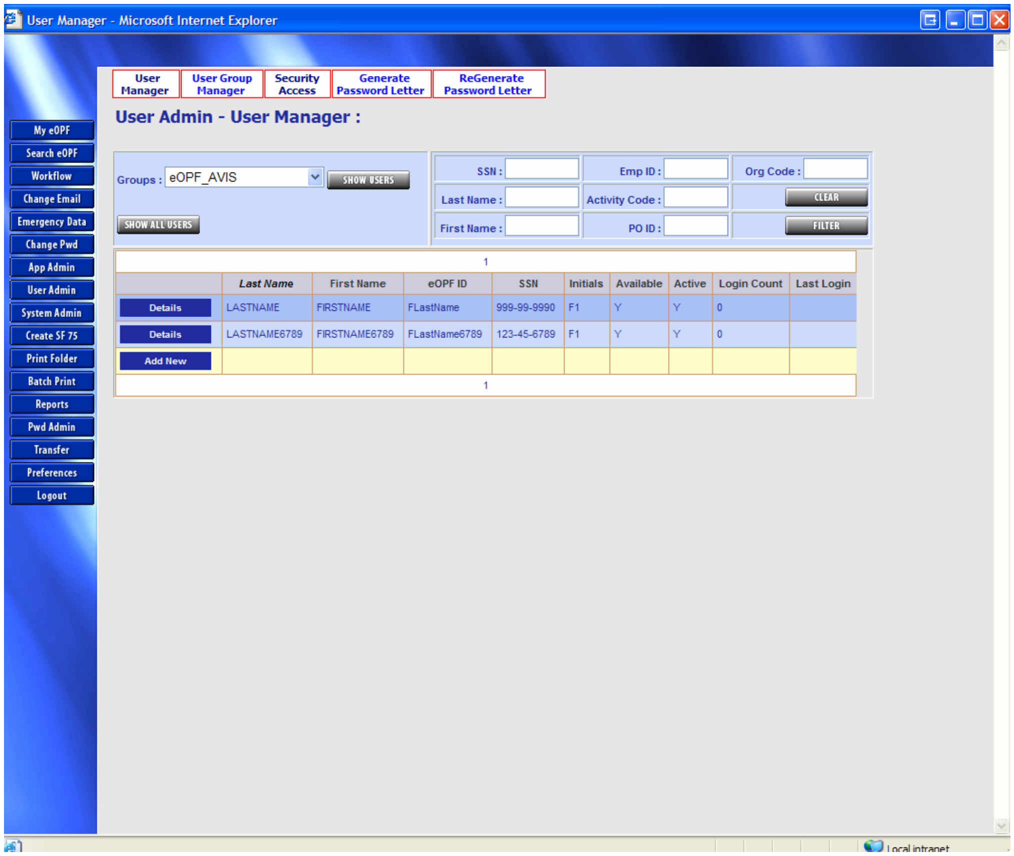
Show All Users button includes both the group selection and the entered search criteria when listing users.

---

4. **Click the** 

***Show All Users* button.**
   The ***User Manager*** page refreshes with a list of all employees found with the entered *SSN* and selected group. If the employee already exists, click details to continue work on the selected employee.

The following figure displays the ***User Manager*** page with the employee list displayed.

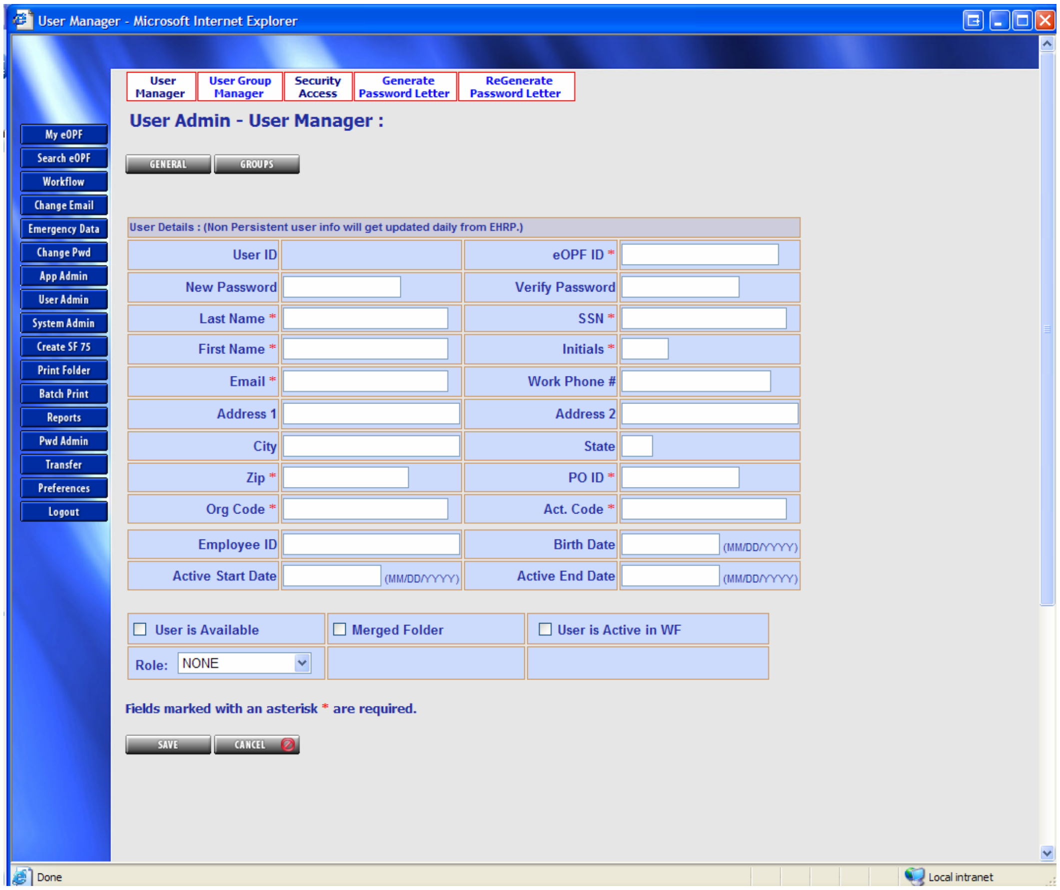


5. Click the 

***Add New* button.**

The ***User Manager*** page appears with a form for enter user details.

The following figure shows the ***User Manager*** page with the user details form displayed.



The following table describes screen elements of the ***User Manager/User Details*** page.

Element	**Required (R) / Optional (O)**	**Description**
eOPF ID	NA	None
New Password		If creating a new user the password is required. Any time the eOPF ID is modified a new password is required. A password change is not required if other personal data is changed.
Verify Password	R/O	Verify Entry in the New Password field.
Last Name	R	Type the Last Name of the user.
First Name	R	Type the First Name of the user.

Element	Required (R) / Optional (O)	Description
Email	R	Type the Email Address of the user.
Address1	R	Type the Address of the user.
City	R	Type the City of the user.
Zip	R	Type the Zip Code of the user.
Org Code	R	Type the Organizational Code.
Employee ID	O	Agency specific user's employment identifier.
eOPF Login ID	R	Type the Login ID of the user.
SSN	R	Type the SSN of the user.
Initials	R	Type the Initial(s) of the user.
Work Phone	R	Type the Phone number of the user.
Address 2	O	Type an alternate Address of the user.
State	O	Type the State of the user.
PO ID	R	Type the PO ID of the user.
Act. Code	R	Type the Act. Code of the user.
User is Available	O	Select this checkbox if the user will have access granted to the system.
Role	O	Select this drop down list to indicate if user is an investigator, hr specialist, or supervisor. To be a Super user the employee must be a member of the **HR Specialists** Group.
User is Active	O	Select this checkbox if the employee will be performing workflow activities.
Last Login	System	Visible when reviewing existing user. The date the user last logged on to eOPF.
Login Count	System	Visible when reviewing existing user. The number of times a user has logged on to eOPF with the current user's password.
Birth Date	O	Birth date of user.
Employee ID	R	Type the user's employee id.

Element	Required (R) / Optional (O)	Description
Merged Folder	R	Indicates if folder is a Merged Folder.
Folder Status	R	Exist if user has an eOPF. Statuses are Active, Inactive, Transfer Confirmed, Archived. If no folder exists for the user then field shows ‘No eOPF’ in red.
Active Start Date	O	Type the Start Date to make this account active. Leave blank if user will not be limited to a specific time frame for access.
Active End Date	O	Type the End Date to make this account active. Leave blank if user will not be limited to a specific time frame for access.

Note:

To be a superuser an employee must also be a member of the HR Specialist group.

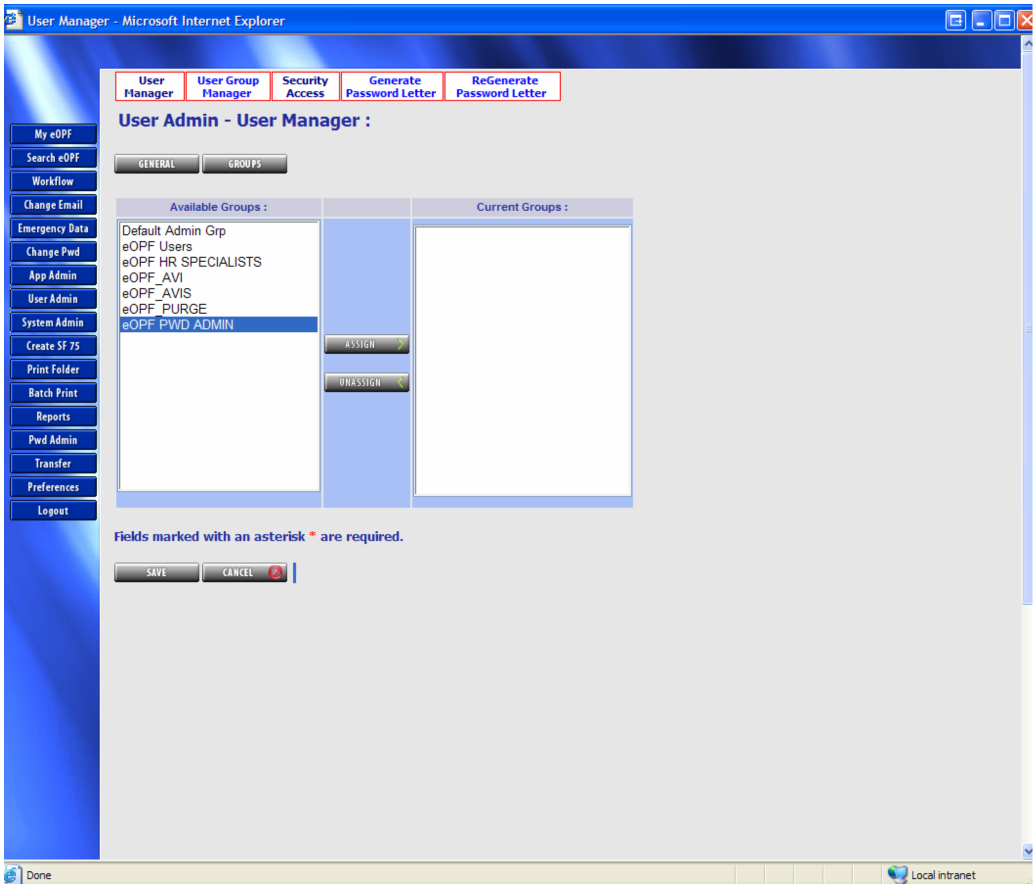
6. Index all known employee information.

7. Click the 

***Groups* button.**

The ***User Manager Groups*** page appears.

The following figure displays the ***User Manager Groups*** page.



8. Select the desired *Groups* listed in the *Available Groups* list and click on the  ***Assign*** **button to move the selected groups to the *Current Groups* list.**

Note:

To Add Documents, Modify Documents, Delete Documents, Annotate Documents, and Modify Document index information an employee must be a member of the eOPF_AVI user group. If the employee will also scan documents then he/she must be a member of the eOPF_AVIS user group. Membership in these groups should be limited to users that are HR Specialist and are members of the HR Specialist group. To purge documents from the eOPF repository a user must be a member of the eOPF_PURGE group. Any user that is performing Admin functions must be a member of the default admin group. This group can be limited in privileges and other groups created to manage admin access, however, membership in the default admin group triggers certain connection privileges that allow an administrator to perform activities.

9. Click the *Save* button.
The ***User Manager*** page reappears displaying the following message "User Info updated successfully."

Note:

This process only creates a user with a ***Folder Status*** of **'No eOPF'**. No folder is actually created for the user. Folders are only created for employees that are added to eOPF repository through the automated employee data feed.

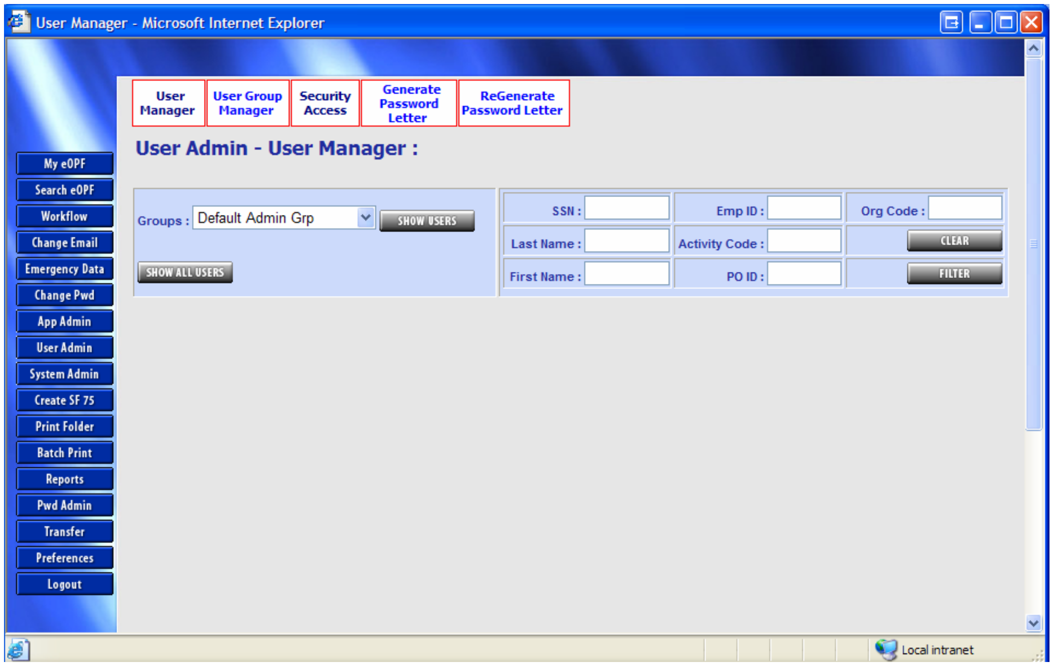
Viewing and Updating the User Identification Information

To View and Update User Identification Information:

1. From the eOPF main menu buttons, click the *User Admin* button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. If not on the User Manager tab, click the *User Manager* tab at the top of the page.
The ***User Manager*** page appears.

The following figure displays the ***User Manager*** page.



3. Select the *Group* from the drop-down menu.

4. In the *SSN* field, enter the user's social security number; then click the *Filter* button.

Note:

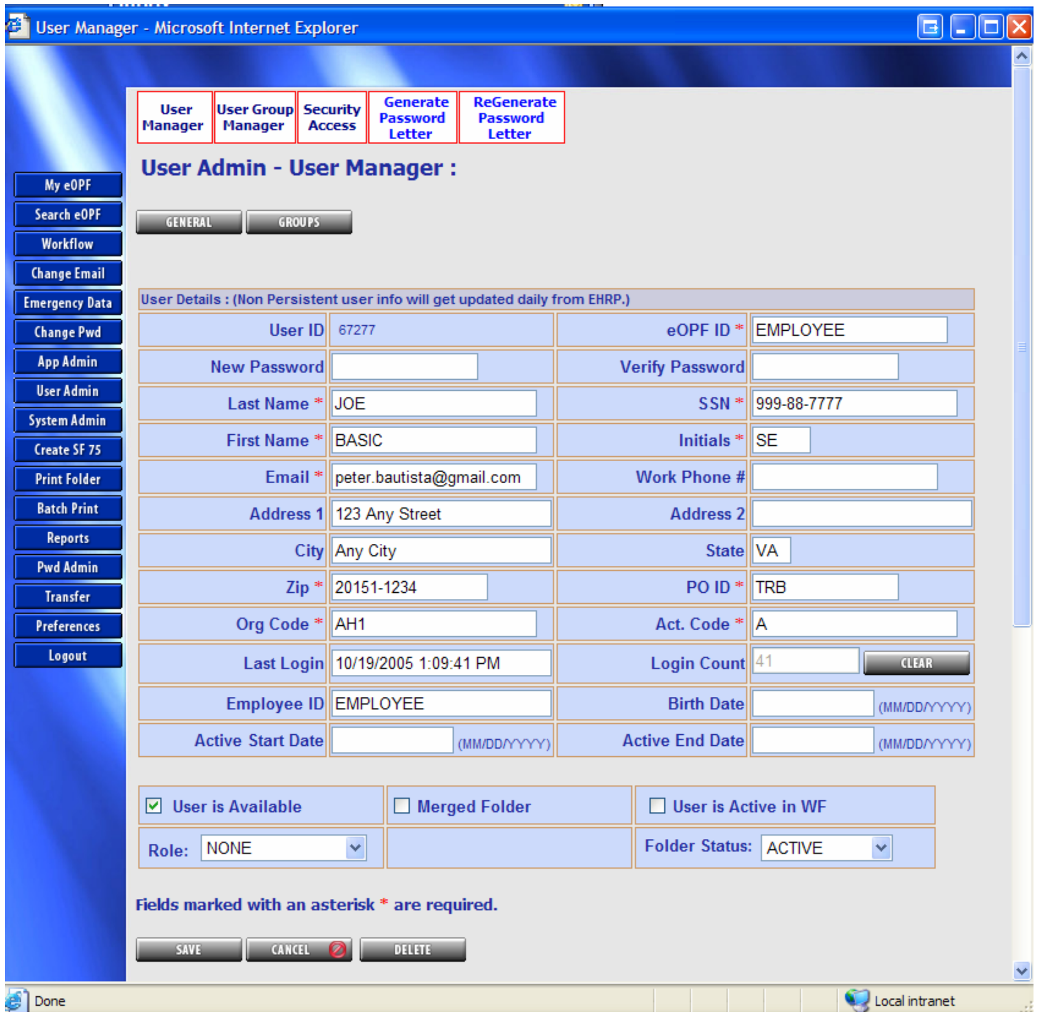
The ***Filter*** button does not include the selected group shown in drop-down group list when executing the search. The 

Show All Users button includes both the group selection and the entered search criteria when listing users.

---

5. Click the *Details* button, to display the user details form on the *User Manager* page.

The following figure shows the ***User Manager*** page with the user details form displayed.



6. **To designate user as available, click the *User is Available* checkbox.**
   The *User is Available* checkbox means that the user has access to the eOPF system and can log on.

7. **To designate the user as active in workflow, click the *User is Active in WF* checkbox.**
   The *User is Active in WF* checkbox means that the user will be performing workflow activities.

8. **To designate folder status, select a status from the *Folder Status* drop-down list.**
   An employee folder must have one of three statuses.

   - **ACTIVE:** The folder is actively receiving new documents.

- **INACTIVE**: The folder is closed to new documents and awaiting archival.
- **ARCHIVE:** The folder has been archived.
- An eOPF user (Contractor) who does not have a folder will automatically have a folder status of **'No eOPF'**.

9. When you finish editing the information, click the 

***Save* button.**

Note:

The employee status and the employee folder status are managed separately. You can be an active employee with access to the eOPF system while having a folder status of **'No eOPF'**. An example would be a contractor who supervises employees. **The Contractor needs access to the system to manage the employees who have OPFs, however, the contractor's folder status is 'No eOPF'.**

Viewing and Modifying Super User and Supervisor Access

As an eOPF administrator you have the ability to view, establish and update which records a Super User and a Supervisor can access. The Super User controls access by (PO ID, Activity Code and Org Code) or specific SSN of employee to the eOPF folders.

eOPF allows the eOPF administrator to establish and update Super User or Supervisor Designation.

A nightly employee data feed from an agency's HR system determines Supervisor and Super User designations. The Super User has access to view electronic personnel folders for an additional selection of employees whose documents he/she would not have access to by virtue of the Supervisor definition.

For example, an HR staff member is in organization AB, however, the person is responsible for servicing employees in organization C. Designating the person as a Super User and defining the additional organization (C) provides that HR Staff member with the required access.

To Establish or Update Super User or Supervisory Designation:

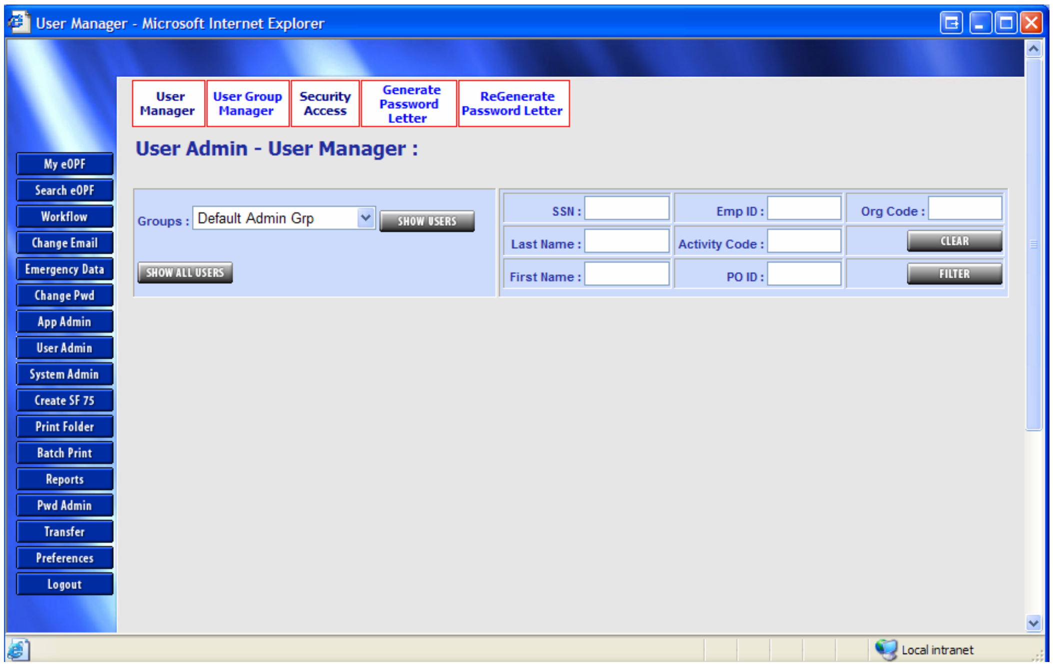
1. From the eOPF main menu buttons, click the 

***User Admin* button.**

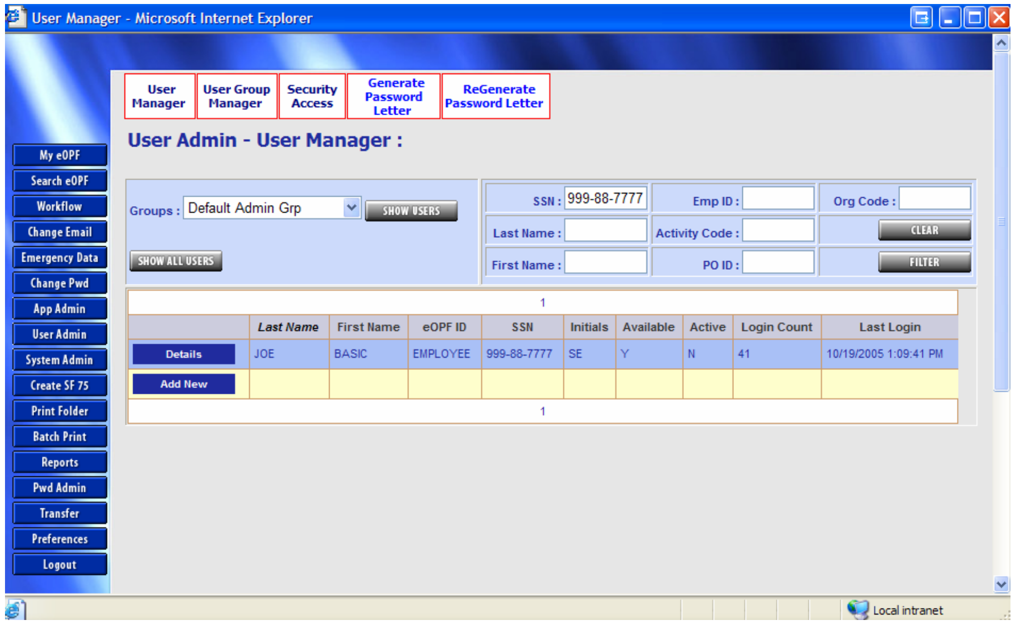
The *User Manager* tab of the ***User Admin*** page displays by default.

2. If not on the User Manager tab, click the User Manager *User Manager* tab.
The ***User Manager*** page appears.

The following figure shows the ***User Manager*** page.



3. Type the employee's SSN in the *SSN* field, and then click the SHOW ALL USERS *Show All Users* button.
The ***User Manager*** page reappears with a user list.

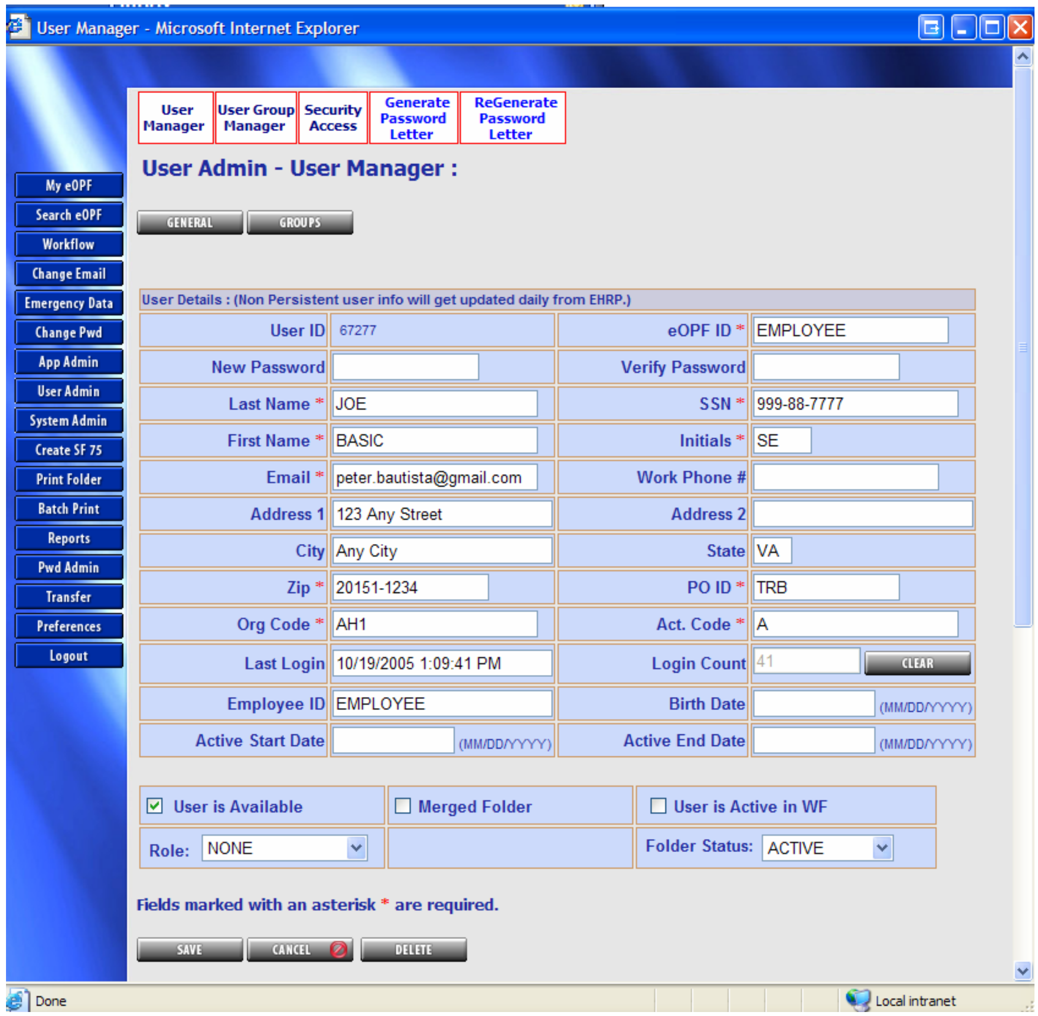


4. **Click the** 

Details **button next to the listed user.**

   The ***User Manager*** page appears with the user details form displayed.

The following figure shows the ***User Manager*** page with the user details form displayed.



5. **To designate the individual as a Super User, use the Role drop down list and select ‘SUPERUSER’.**
   The Super User designation is used by eOPF for selected employees, usually HR staff, who require (and are authorized to) access to electronic personnel folders for employees.

6. **To designate the individual as a Supervisor, use the Role drop down list and select the value ‘SUPERVISOR’.**
   Employees designated as Supervisors have access to their own eOPFs and access to view and print documents for employees they supervise. While Super Users are not limited to specific documents the Supervisor document access is managed by an administrator and controlled through the *Supervisor Form Access* tab.

Viewing Additional Access Information

The eOPF system allows eOPF administrators to define Additional User Access to specific groups or individual OPFS using PO IDs, Activities, Organizational units and individual SSN of employees.

To View Additional User Access Information:

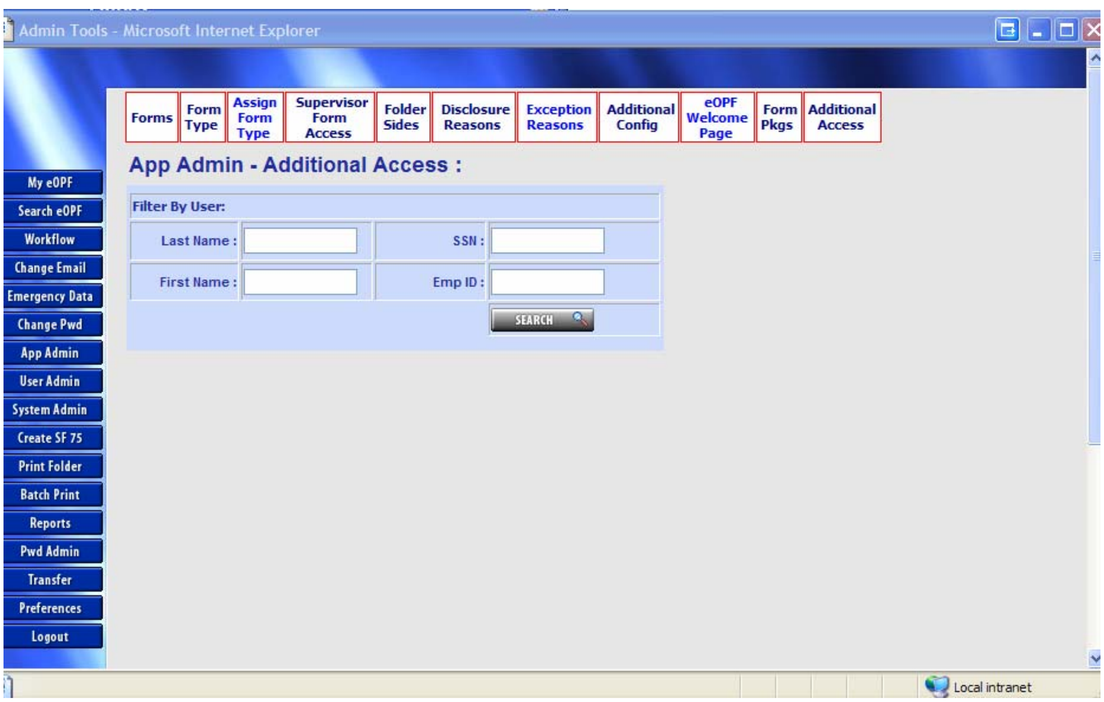
1. **From the eOPF main menu buttons, click the** 

App Admin button.
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the** 

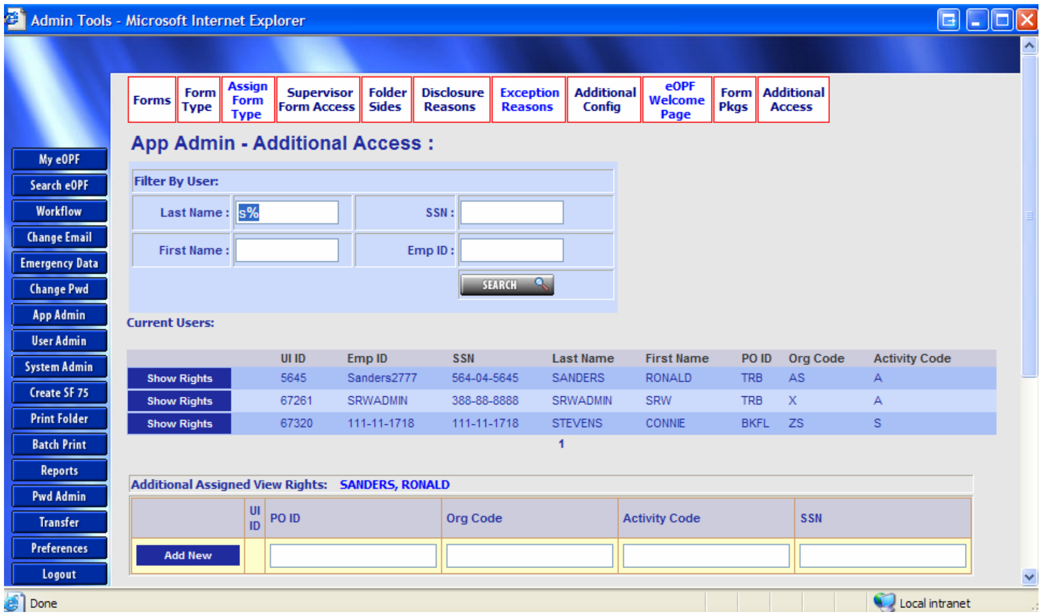
Additional Access tab.
The ***Additional Access*** page appears.

The following figure shows the ***Additional Access*** page.



3. **Type the desired User Information, and then click _Search_.**
The ***Additional Access*** page reappears with the desired user information displayed.

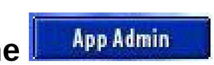
The following figure shows the ***Additional Access*** page with information displayed.



Modifying Additional Access Information

The eOPF administrator can modify the Supervisor or Super User Access Information. When an employee identified as a supervisor or super user changes positions, the Super User Access Information may need to be changed.

To Modify Additional Access Information:

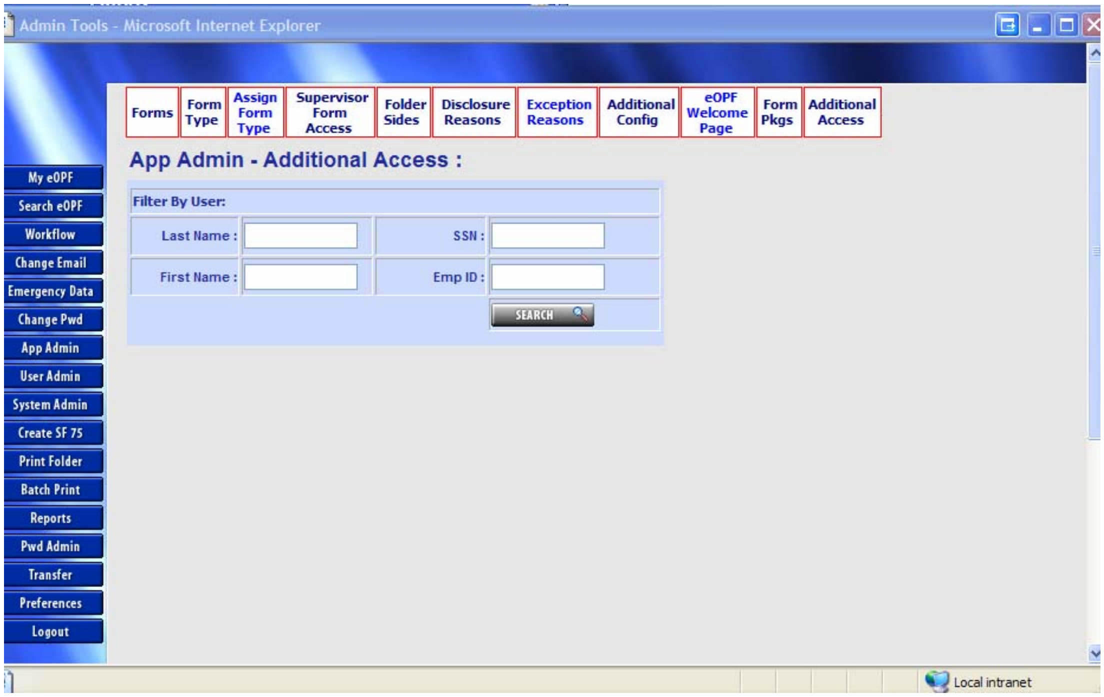
1. **From the eOPF main menu buttons, click the** 

***App Admin* button.**
The *Forms* tab of the ***App Admin*** page displays by default.

2. **Click the** 

***Additional Access* tab.**
The ***Additional Access*** page appears.

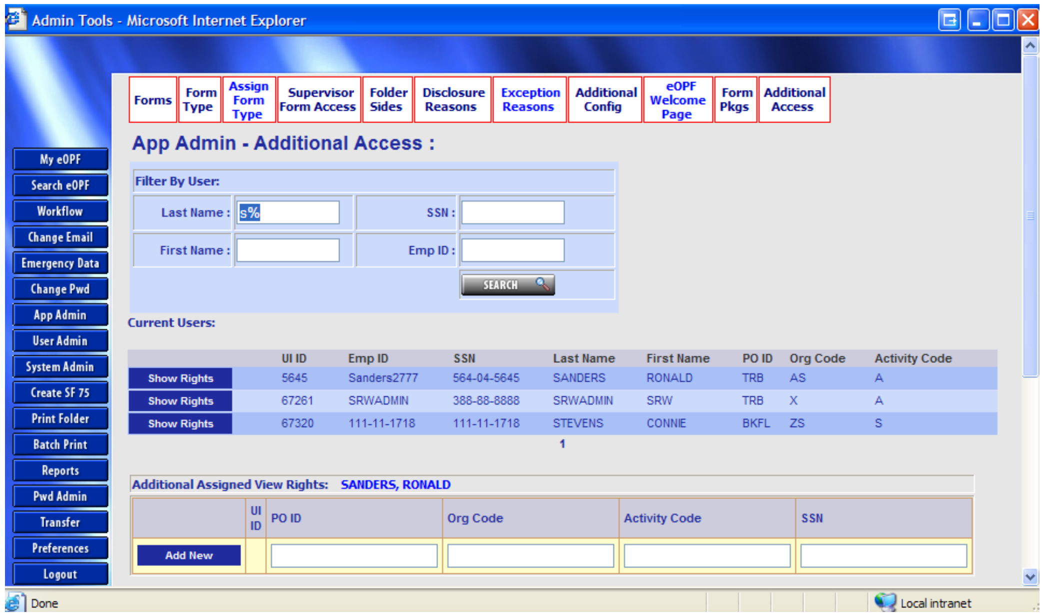
The following figure shows the ***Additional Access*** page.

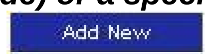


3. Type the search criteria in the designated fields, and then click *Search*.

The ***Additional Access*** page reappears with the desired information.

The following figure shows the ***Additional Access*** page with information displayed.



4. **To assign additional rights, enter a combination of the (*PO ID*, *Activity Code,* and/or *Org Code) or a specific SSN* in the designated fields; then click the**  ***Add New*** **button.**
   The ***Additional Access*** page reappears with the updated information displayed

---

Note:

PO ID, ***Activity Code***, and ***Org Code*** are wild card values; e.g., Activity 123 would pickup any Activity including 123 or that has an Activity identifier that starts with 123 followed by additional numbers or letters.

---

5. **To delete rights assigned to the user, click the**  ***Delete*** **button on the row selected for deletion.**
   The row is deleted and the page refreshed.

Resetting an Employee's Password

The eOPF allows an eOPF administrator to reset an employees password from the user manager detail page. You may also reset the password using the Re-generate Password letter tab.

To Reset an Employee's Password:

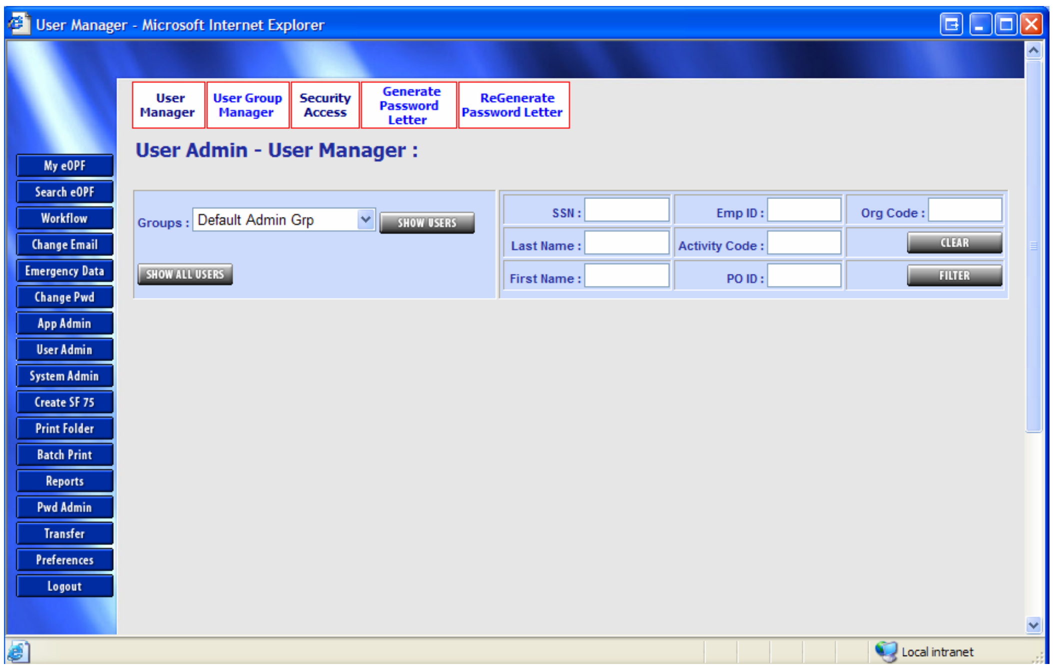
1. **From the eOPF main menu buttons, click the** 

User Admin button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. **If the User Manager page is not visible, click the** 

User Manager tab.
The ***User Manager*** page appears.

The following figure shows the ***User Manager*** page.

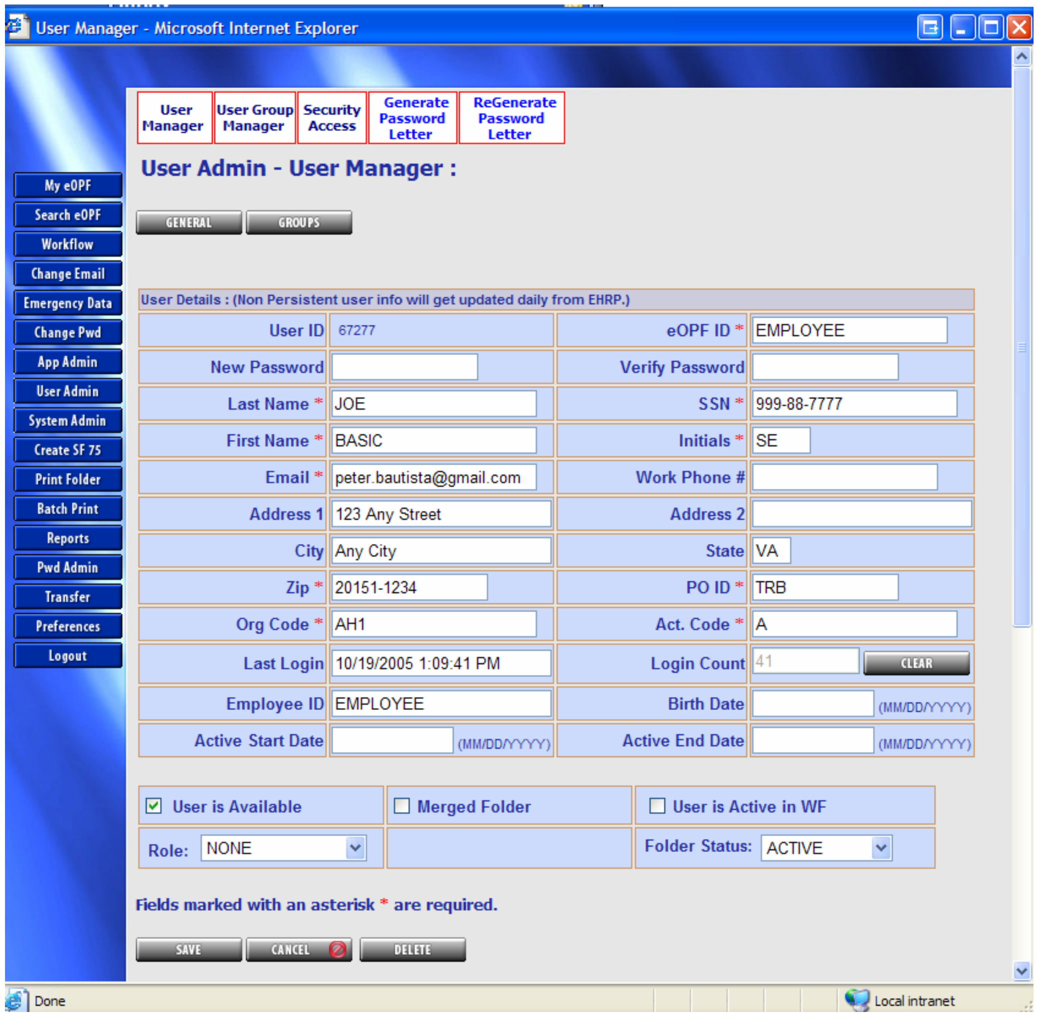


3. **Search for the desired employee.**

4. **Click on the** 

Details button next to the desired employee.
The ***User Manager*** detail page appears.

The following figure shows the ***User Manager*** page with the user details form displayed.



5. Type a new password in both the new password and verify password fields.

6. Click the  ***Save*** **button.**

The ***User Manager*** page reappears with the following message displays “User Info updated successfully”. Validation occurs when saving. Any mandatory field missing data will cause the system to display and error message prompting you to enter required information.

Changing an Employee’s Email Address

The eOPF allows an eOPF administrator to change an employee’s email address.

To Change an Employee's Email Address:

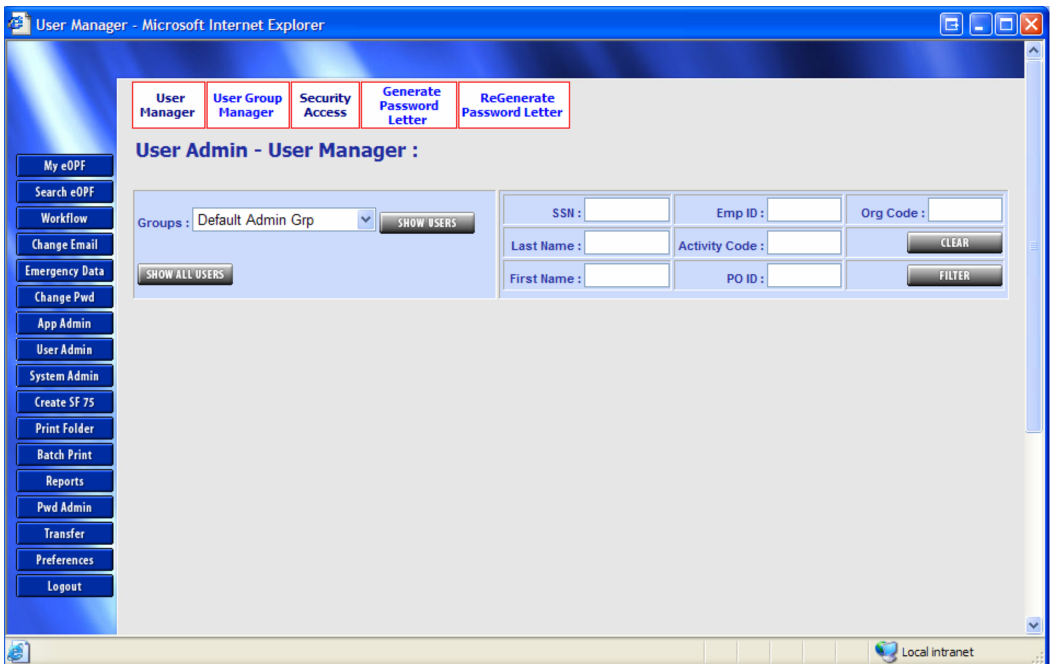
1. **From the eOPF main menu buttons, click the** 

User Admin button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. **If the User Manager tab is not visible, click the** 

User Manager tab.
The ***User Manager*** page appears.

The following figure shows the ***User Manager*** page.

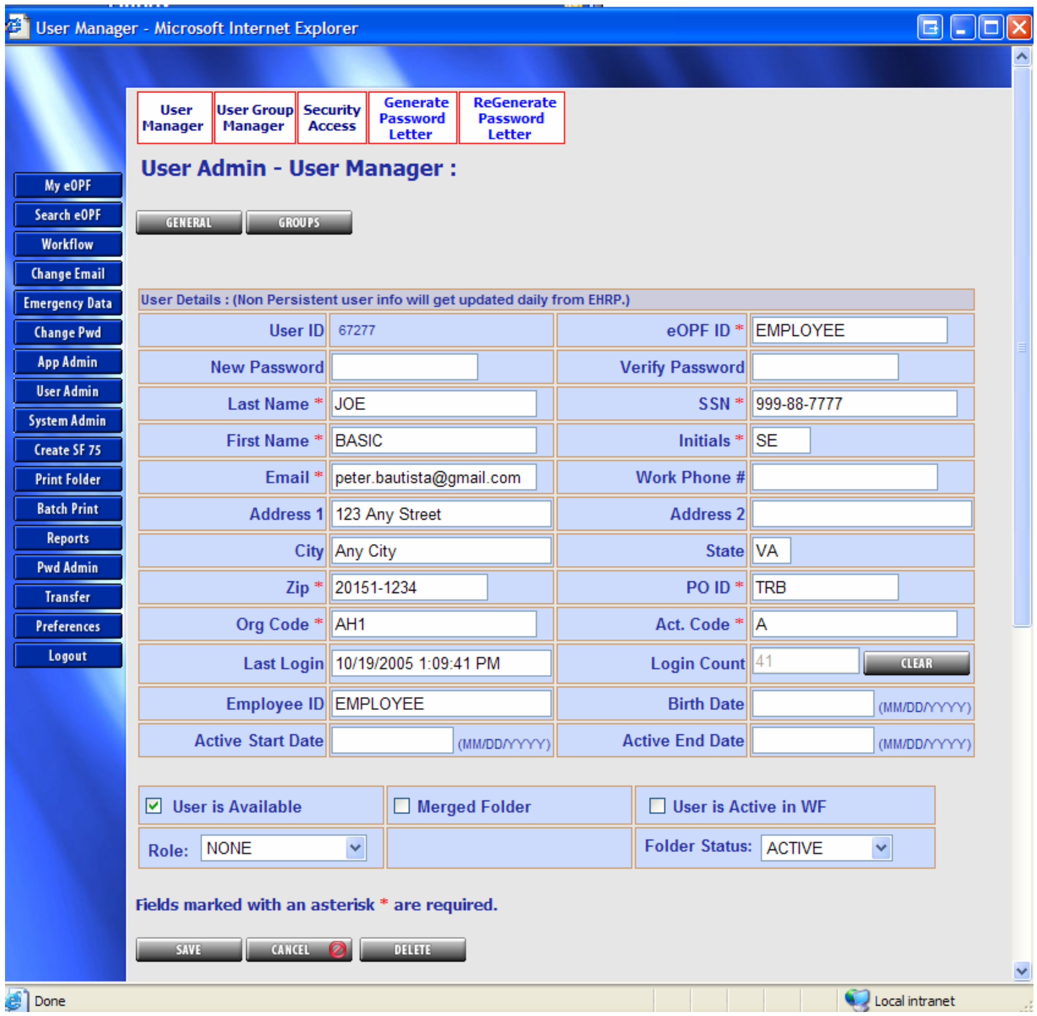


3. **Search for the desired employee.**

4. **Click on the** 

Details button next to the desired employee.
The ***User Manager*** detail page appears.

The following figure shows the ***User Manager*** page with the user details form displayed.



5. Type the email address in the *Email* field.

6. Click the 

***Save* button.**

The ***User Manager*** page reappears with the following message displays "User Info updated successfully". Validation occurs when saving. Any mandatory field missing data will cause the system to display and error message prompting you to enter required information.

Deleting a User Account

eOPF accounts once created and used can not be deleted as all the audit information must be maintained. If the account is tied to an OPF it can not be deleted. However, if an account is created and never used that account can be deleted. For example, an agency may create an account for an outside investigator. The investigator never uses the account. The agency administrator could then remove the account.

To Delete a User Account:

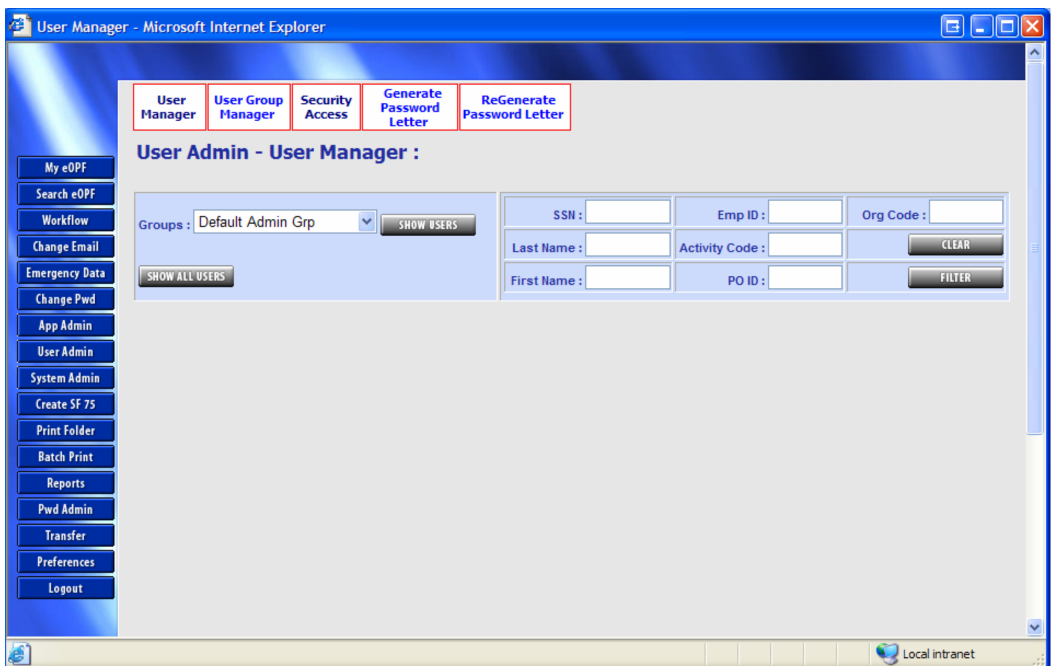
1. **From the eOPF main menu buttons, click the** 

User Admin button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. **If the User Manager tab is not visible, click the** 

User Manager tab.
The ***User Manager*** page appears.

The following figure shows the ***User Manager*** page.

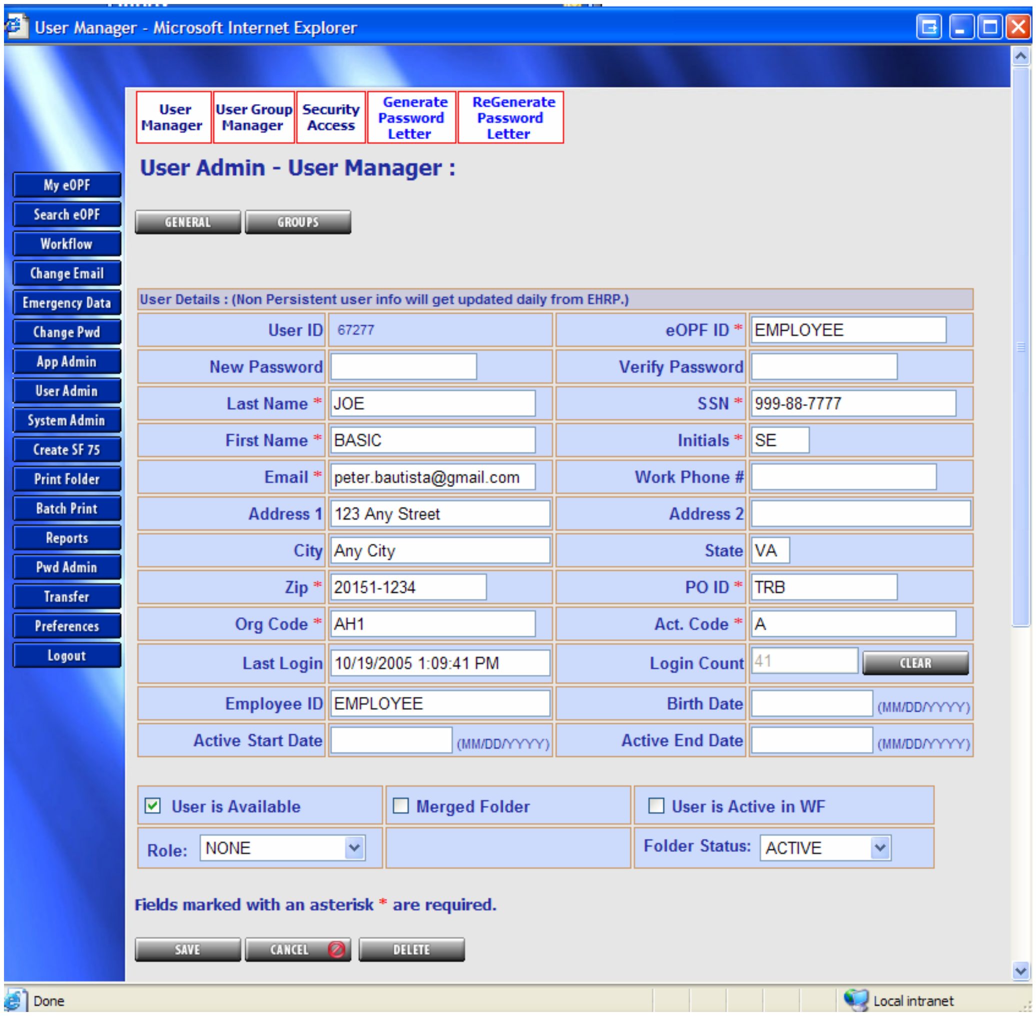


3. **Search for the desired employee.**

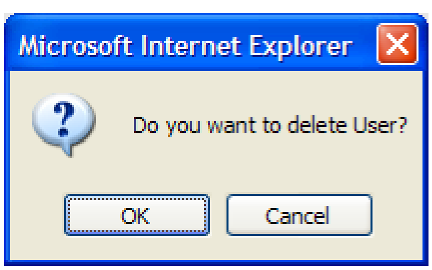
4. **Click on the** 

Details **button next to the desired employee.**
The ***User Manager*** detail page appears.

The following figure shows the ***User Manager*** page with the user details form displayed.



5. Click the *Delete* button. A confirmation prompt will be displayed.



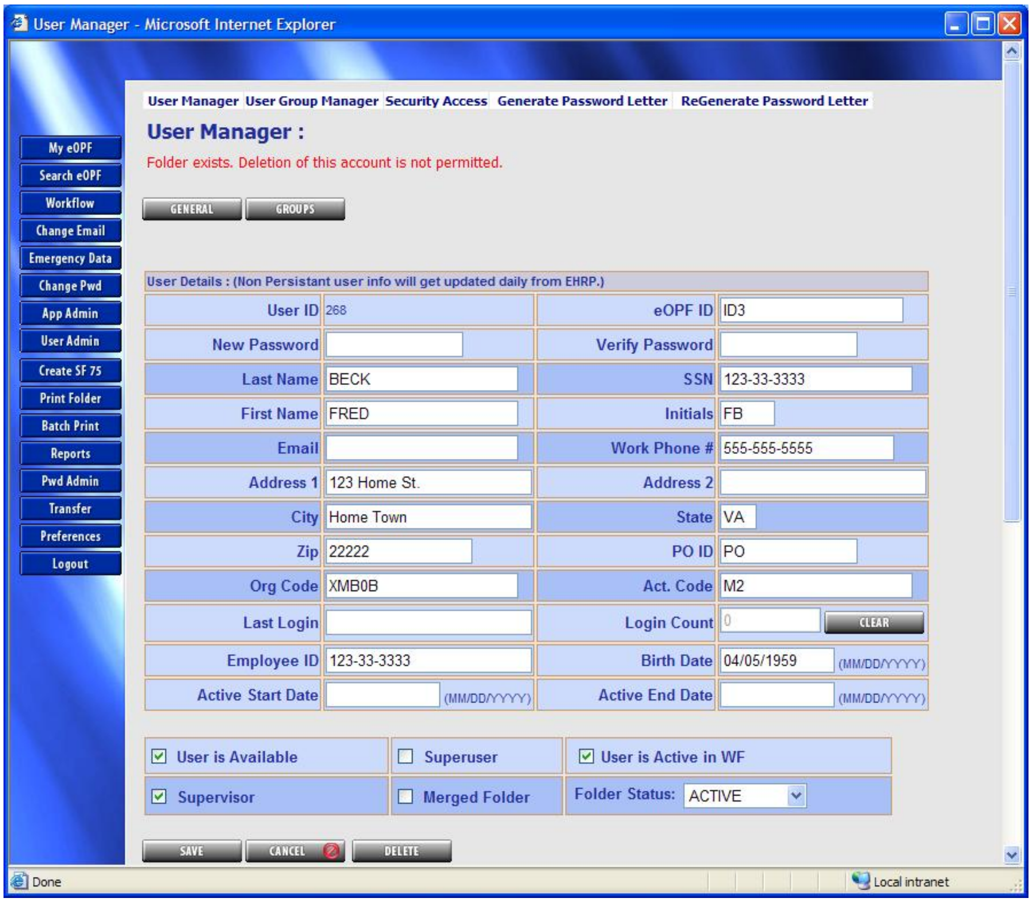
6. Click the  ***OK* button.**

If the account has been unused you will be prompted to enter a reason for the deletion. Enter a reason and then click the *Delete* button. You are returned to the original Search Results of your user query and the user is now deleted.

Note:

If activity had occurred on the account you would be denied the ability to delete the account. If the account has a folder associated with it and it contains documents you will be denied the ability to delete the account.

This graphic display the message received when trying to delete an account that contains a valid folder.



Chapter 17: Producing Password Letters

Generating Password Letters

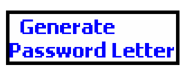
When new users are established in the eOPF system they are assigned a temporary password. A password letter will be generated by eOPF to inform employees of the temporary password. As soon as an employee logs on for the first time they will be prompted to change their password.

Letters need to be regenerated for users who have forgotten their passwords. The new user password is generated when the letter is generated. You can either print and mail the letter or save the file and send via email. The method used depends on the security you desire.

To Generate a Password Letter:

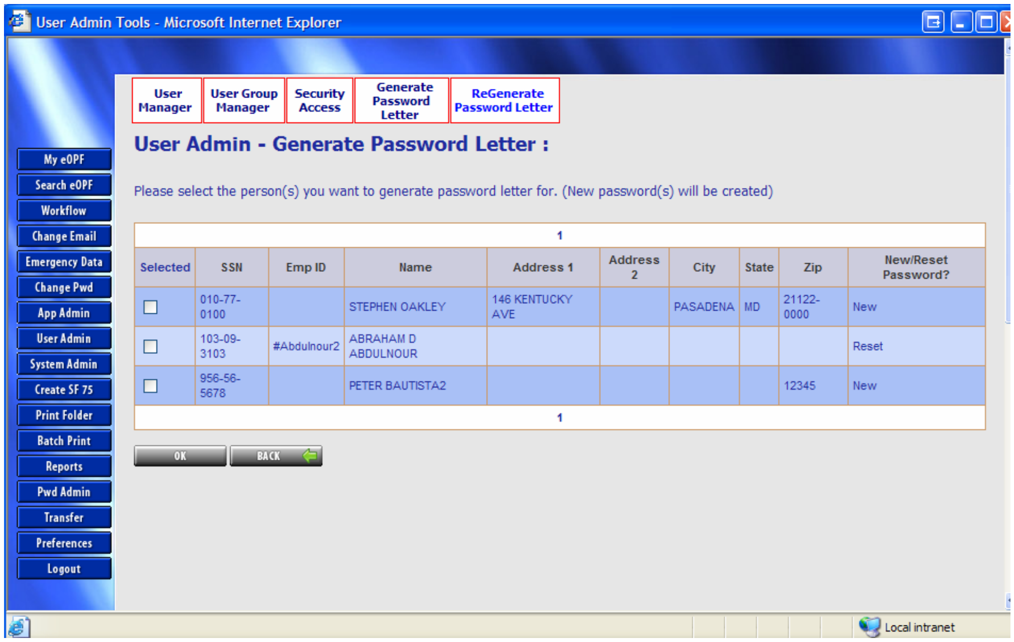
1. **From the eOPF main menu buttons, click the** 

   ***User Admin* button.**
   The *User Manager* tab of the ***User Admin*** page displays by default.

2. **Click the** 

   Generate Password Letter tab.
   The ***Generate Password Letter*** page appears. The Checkbox will be grayed out (disabled) when the users' mailing address is not in the database.

The following figure shows the ***Generate Password Letter*** page.

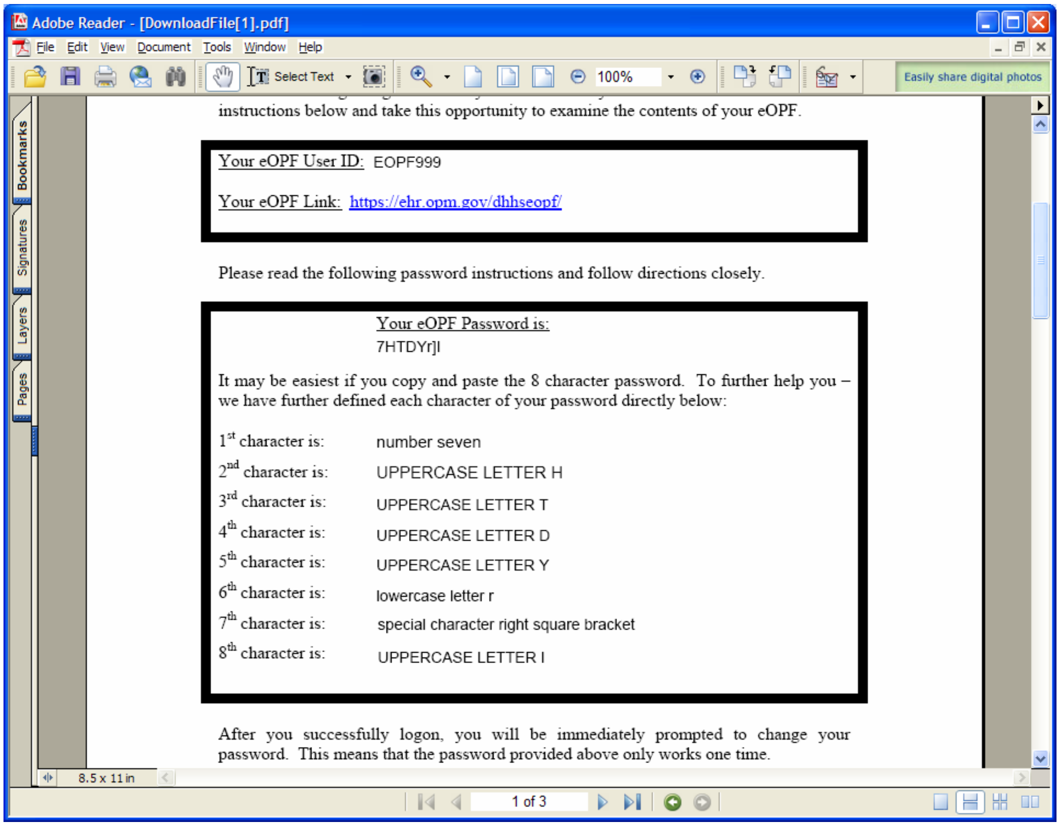


3. Verify that the only checkboxes selected are associated with the desired user(s), and click the 

***Ok* button.**

The generated letter(s) appear as a PDF File that can be printed and mailed to user. Notice that the password is broken down character by character an explained in plain text. This helps eliminate password issues with certain characters. Some user find it difficult to distinguish between a 1 (Number one) and l (lower case L).

The following figure displays a sample letter.



instructions below and take this opportunity to examine the contents of your eOPF.

Your eOPF User ID: EOPF999

Your eOPF Link: https://ehr.opm.gov/dhhseopf/

Please read the following password instructions and follow directions closely.

Your eOPF Password is:
7HTDYr]I

It may be easiest if you copy and paste the 8 character password. To further help you – we have further defined each character of your password directly below:

1st character is:	number seven
2nd character is:	UPPERCASE LETTER H
3rd character is:	UPPERCASE LETTER T
4th character is:	UPPERCASE LETTER D
5th character is:	UPPERCASE LETTER Y
6th character is:	lowercase letter r
7th character is:	special character right square bracket
8th character is:	UPPERCASE LETTER I

After you successfully logon, you will be immediately prompted to change your password. This means that the password provided above only works one time.

Regenerating a Password Letter

eOPF gives you the ability to regenerate password letters for users.

To Regenerate a Password Letter:

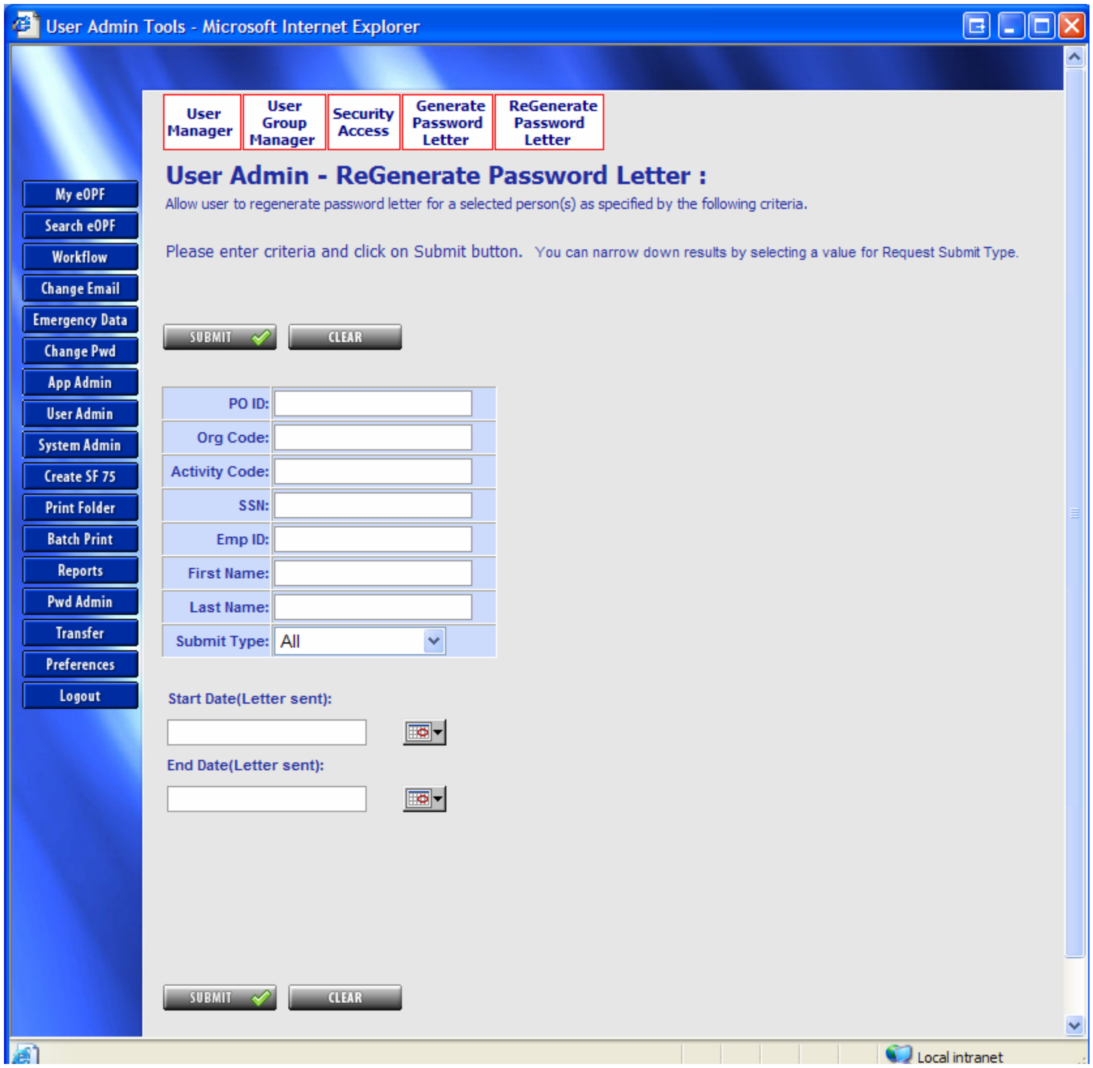
1. **From the eOPF main menu buttons, click the** 

User Admin button.
The *User Manager* tab of the ***User Admin*** page displays by default.

2. **Click the** 

ReGenerate Password Letter tab.
The ***ReGenerate Password Letter*** page appears.

The following figure shows the ***ReGenerate Password Letter*** page.

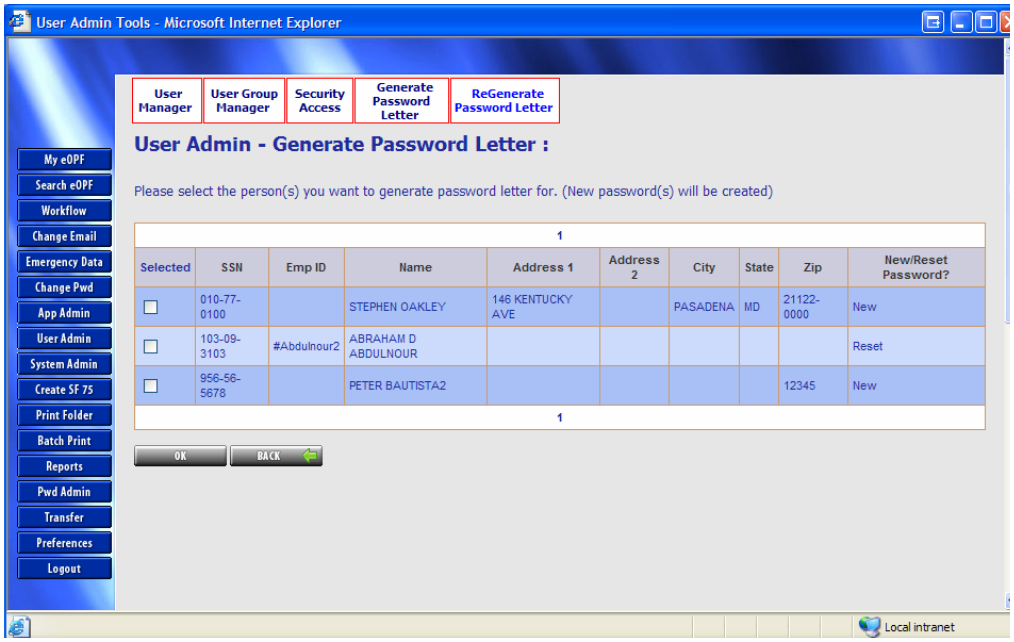


3. Type the desired search criteria, and then click the 

***Submit* button.**

The ***Generate Password Letter*** page appears.

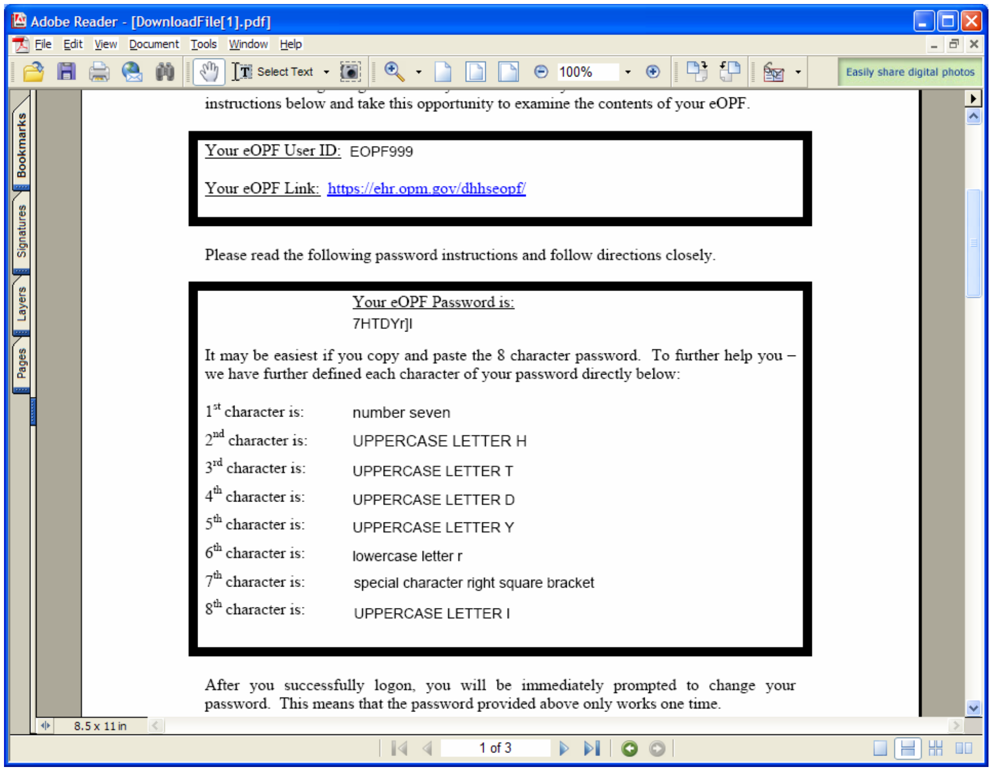
The following figure shows the ***Generate Password Letter*** page.



4. Verify the desired user is selected, and then click the  ***Ok* button.**

The document appears. Notice that the letter contains the password broken down into a plain text explanation of each character. This helps eliminate password issues with certain characters. Some user find it difficult to distinguish between a 1 (Number one) and l (lower case L).

The following figure displays a sample letter.



Chapter 18: System Admin Features

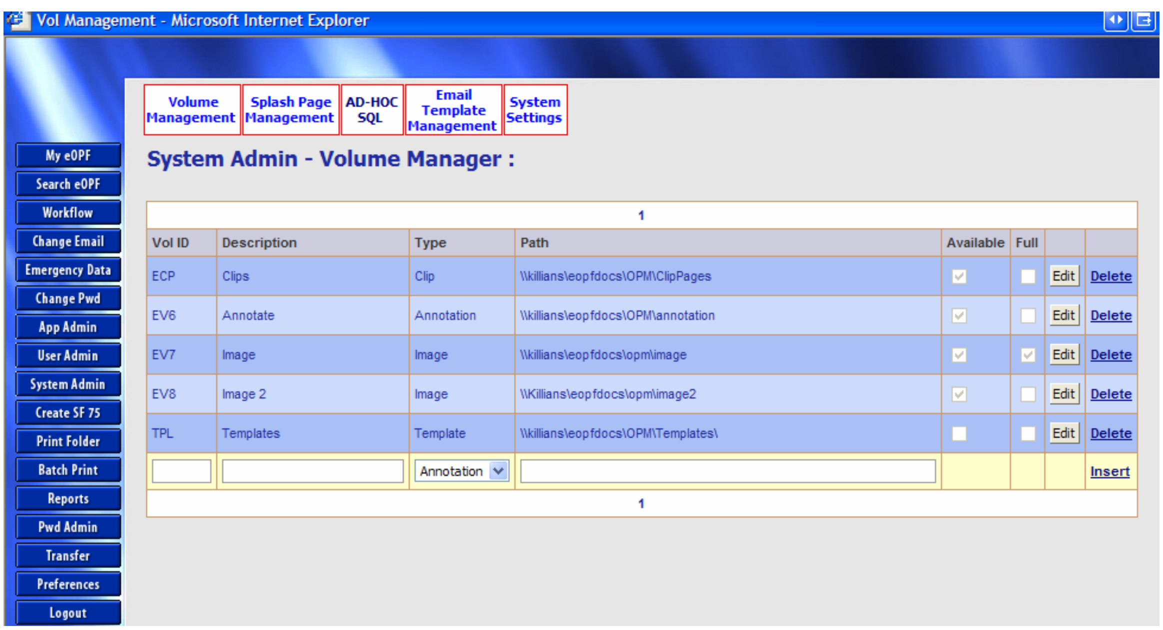
Volume Management

Volume Management eliminates the need to VPN into the host facility to configure eOPF volumes. The host facility must still ensure that storage capacity is available. This should only be used by a trained administrator. There are multiple volume types. The ‘IMAGE’ volume is used to store production document files. The ‘TEMPLATE’ volume is used to store various email templates used by the eOPF application. The ‘CLIP’ volume is used to store the paper clips created by users of the eOPF application. The ‘ANNOTATION’ volume is use dot store any annotations created by users of the eOPF application.

Accessing Volume Information

1. **From the eOPF main menu buttons, click the** 

System Admin button.
The *Volume Manager* tab of the ***System Admin*** page displays by default.



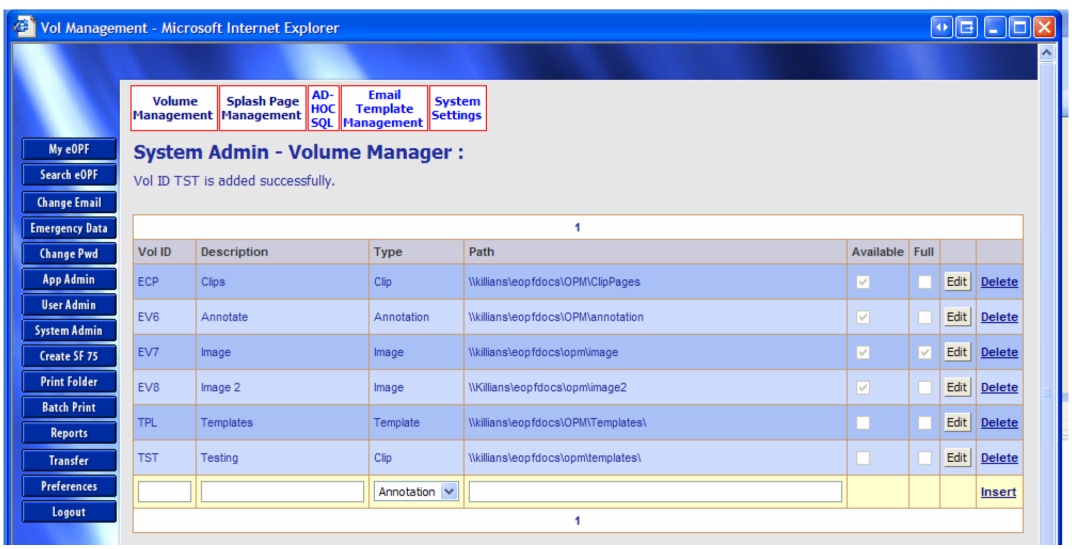
Insert a new Volume

1. **Access the *System Admin – Volume Manager* page. Scroll to the bottom of the list and enter values into the fields for:**

    - Volume ID → Unique three character identifier.
    - Description → Identifies the purpose of the volume.
    - Type (Annotation, Image, Clip, or Template) → This field captures the type of volume.
    - Path → This identifies the location of the volume using a standard UNC entry.

2. **Click *Insert* when all data is correctly entered to add the entry.**

    The following figure displays the ***System Admin – Volume Manager*** page after a record is inserted. A message will display stating if the Volume ID was added successfully.



3. **(Optional) The page will refresh with the new row inserted. Click the edit button and check the new volume as available.**

    When you mark a volume as 'available' it is now usable by eOPF for file storage. Volumes marked as full will no longer receive files for storage.

Edit a Volume

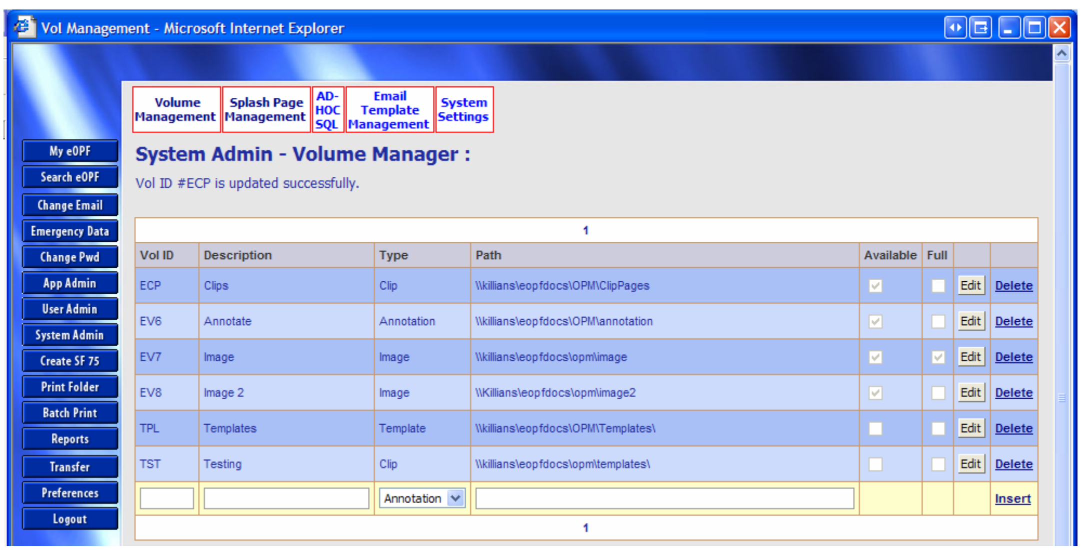
1. **From the *System Admin – Volume Manager* page, Click the Edit *edit* button next to the record you would like to edit.**

2. **Change the values for any of the following fields:**

   - Description → Identifies the purpose of the volume.
   - Path → This identifies the location of the volume using a standard UNC entry.
   - Available (checkbox) → Volume can be used for file storage.
   - Full (checkbox) → Volume has reached desired capacity.

2. **Click *Update* when all data is correctly edited to update the entry.**

   The following figure displays the ***System Admin – Volume Manager*** page after a record is updated. A message will display stating if the Volume ID was updated successfully.

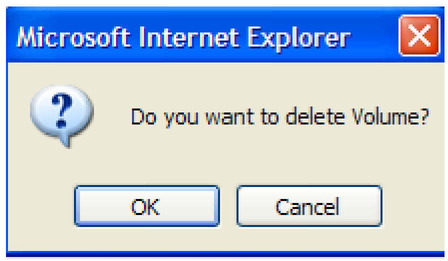


Delete a Volume

A volume can only be deleted if the volume is empty. This implies that all reference to the volume in eOPF have been deleted. References can occur if a document, annotation, template, or paper clip exists and was stored on the volume. Physically removing the files from a volume path has no impact on the ability to delete a volume. All database references must be eliminated from the eOPF repository prior to deletion of the volume entry.

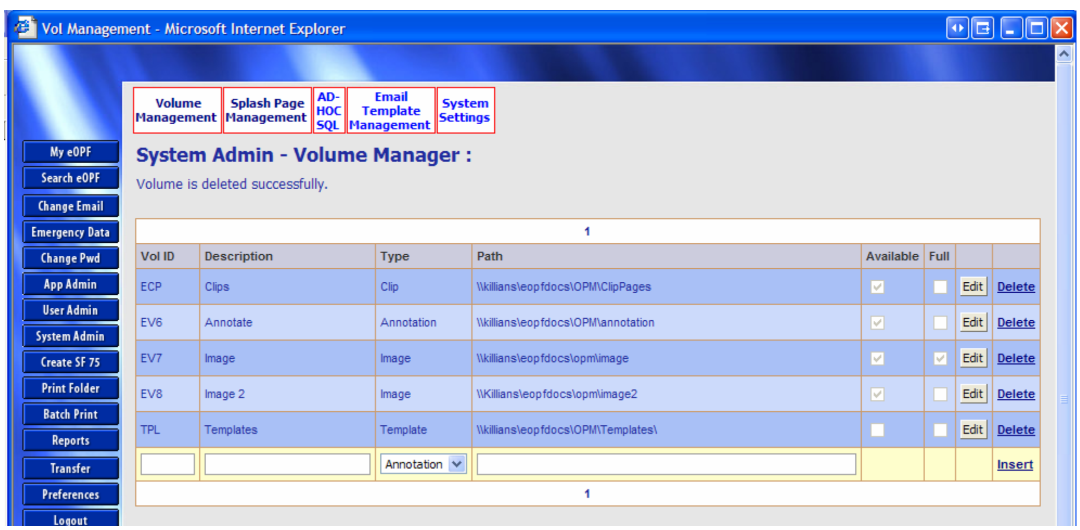
1. **From the *System Admin – Volume Manager* page, Click the *Delete* link next to the record you would like to delete.**

2. **A pop-up window will display asking you to confirm that you want to delete the volume:**



2. **Click ‘OK’ to confirm.**

The following figure displays the ***System Admin – Volume Manager*** page after a record is deleted



Splash Page Management

If a modification to the Splash Page Operation Status is needed, it can be updated on this screen. The message box, administered by the agency, will serve to keep the users informed of planned events.

1. From the eOPF main menu buttons, click the 

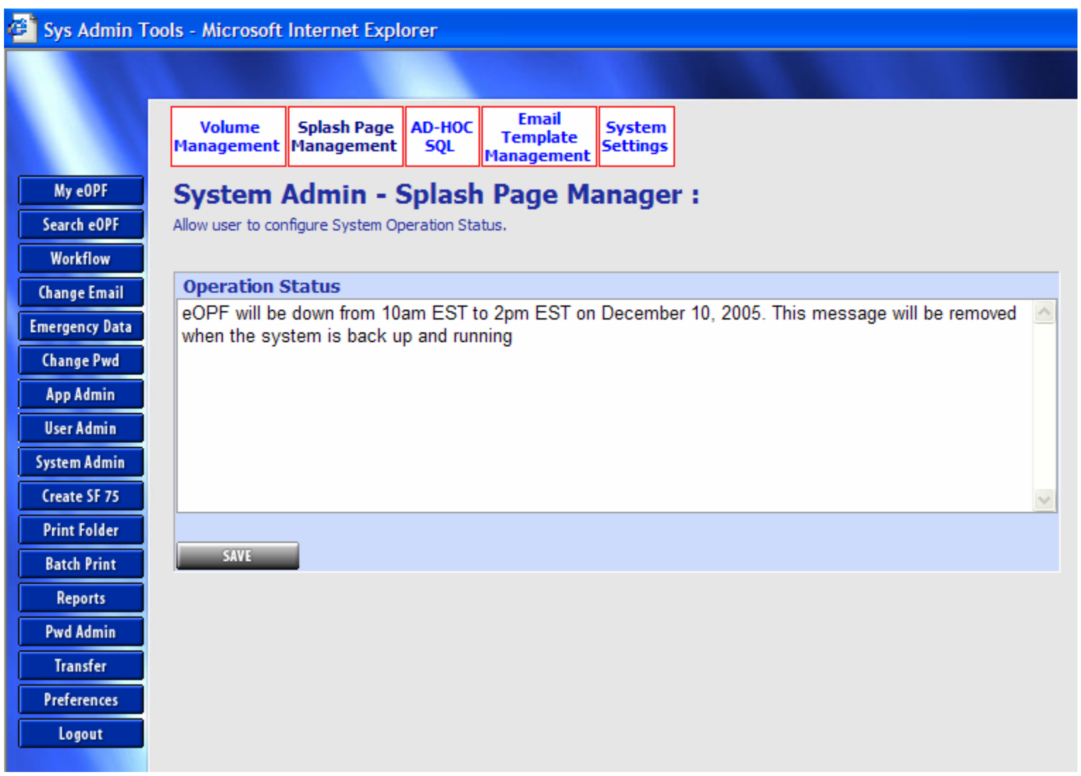
***System Admin* button.**

The *Volume Manager* tab of the ***System Admin*** page displays by default.

2. Click the 

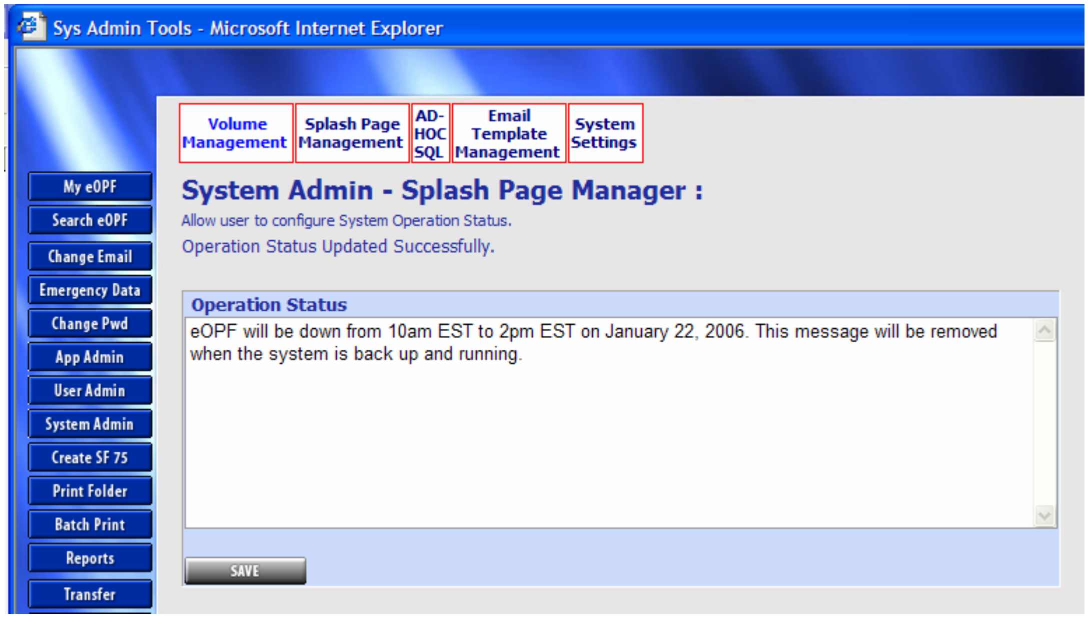
Splash Page management tab.

The ***Splash Page Management*** page appears.



3. Change the text in the Operation Status box and click the *Save* button to update the message.

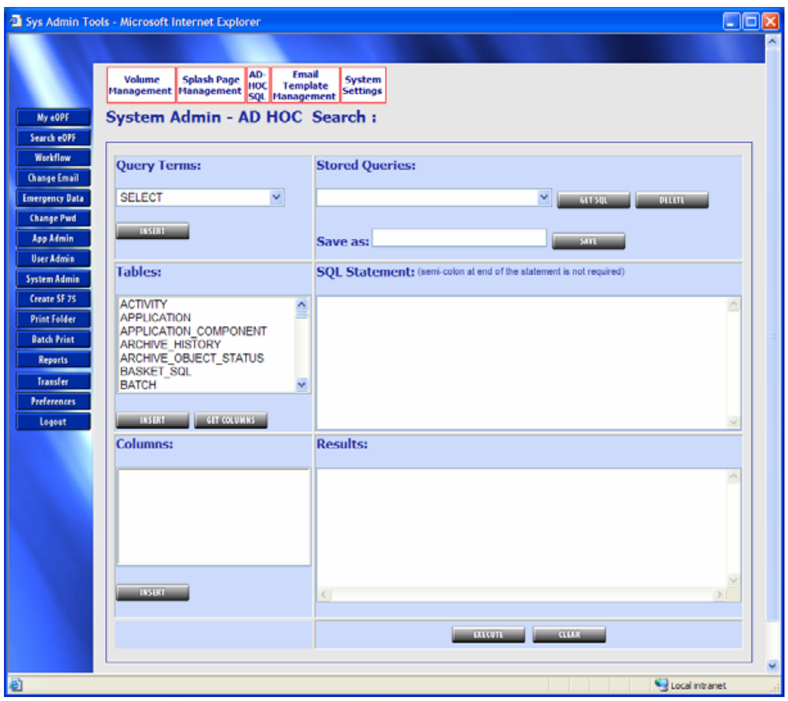
The following figure displays showing that the Operation Status was updated successfully:


Sys Admin Tools - Microsoft Internet Explorer
Volume Management
Splash Page Management
AD-HOC SQL
Email Template Management
System Settings
My eOPF
Search eOPF
Change Email
Emergency Data
Change Pwd
App Admin
User Admin
System Admin
Create SF 75
Print Folder
Batch Print
Reports
Transfer
System Admin - Splash Page Manager :
Allow user to configure System Operation Status.
Operation Status Updated Successfully.
Operation Status
eOPF will be down from 10am EST to 2pm EST on January 22, 2006. This message will be removed when the system is back up and running.
SAVE

Performing an Ad-Hoc Query

The ad-hoc query feature of eOPF can be accessed from the System Admin page and is only available to users that have access to System Administration Tools. This feature should only be used by an individual who is knowledgeable in the use of Structure Query Language (SQL) and the eOPF schema. The *Ad-Hoc Query* page provides a listing of eOPF schema tables, column and SQL commands. A knowledgeable user can perform select activities. Data modification activities such as: insert, update, and delete are not permitted**.**

The following figure displays the ***Ad-Hoc Search*** page.



The *Ad-Hoc Search* page is comprised of several sections. These sections are described in the following table.

Section	Description
Query Term	The Query Terms section lists the reserved words that are available to you when building a SQL query.
Stored Queries	This section allows you to retrieve from a list of previously saved queries or to save a new query.
Tables	Lists the tables that are found in the eOPF Schema.

Columns	Lists the columns found in the selected table. You must pick a table and click on the ***Get Columns*** button in the Tables section to populate the columns list.
SQL Statement	This is a free text box where your SQL query is constructed. You may use the other sections to construct the SQL query or type in a query directly.
Results	This is where the results of your query are presented once you execute the query listed in the SQL Statement text box using the ***Execute*** button. The listed results is limited to the eOPF system setting called 'eOPF REPORT RESULTS LIMIT'. This is typically set to 5000 rows.
Insert Buttons	The Insert buttons found in each section cause the selected item to be placed into the ***SQL Statement Free Text*** box. The selected item is always placed at the end of the text displayed in the ***SQL Statement free text*** box.

The following table describes the ***Ad-Hoc Search*** page buttons.

Button	**Description**
Insert	The ***Insert*** buttons found in each section cause the selected item to be placed into the ***SQL Statement Free Text*** box. The selected item is always placed at the end of the text displayed in the ***SQL Statement Free Text*** box.
Get Columns	This button is found in the ***Tables*** section and populates the column list in the ***Columns*** section based on the table you have selected.
Get SQL	This button is found in the ***Stored Queries*** section. When activated, this button will populate the ***SQL Statement Free Text*** box with the SQL query saved with the selected stored query you chose from the drop-down list.
Delete	This button is found in the ***Stored Queries*** section. When activated, this button deletes the selected stored query chosen from the drop-down list.
Save	This button is found in the ***Stored Queries*** section. When activated, this button saves the query found in the ***SQL Statement Free Text*** box and gives it the name shown in the ***Save As:*** field.

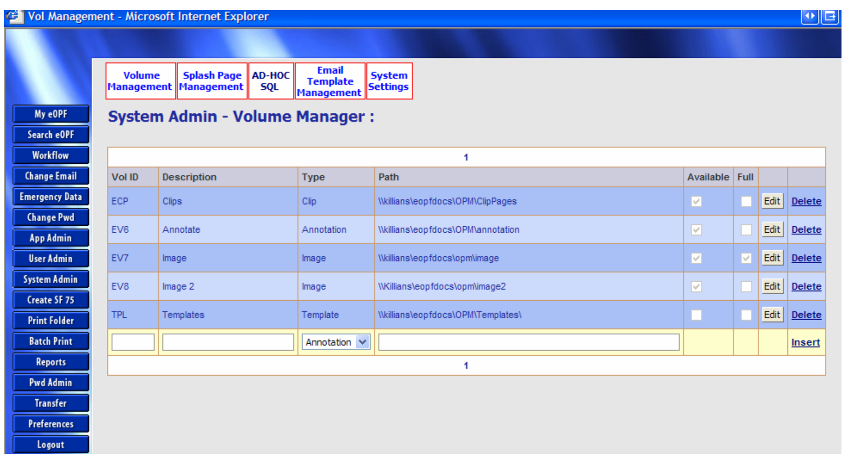
Execute	This button is found below the ***SQL Statement*** section. When activated, this button attempts to execute the query currently displayed in the ***SQL Statement Free Text*** box.
Cancel	This button is found below the ***SQL Statement*** section. When activated, you are returned to the ***Search Folders*** page.
Clear	This button is found below the ***SQL Statement*** section. When activated, clears the contents of the fields on the ***Ad-Hoc Search*** page.

To Access the Ad-Hoc Query Feature:

1. **Click the** 

***System Admin* button on the eOPF main menu.**
The ***System Admin – Volume Manager*** page displays.

The following figure displays the ***System Admin – Volume Manager*** page.



2. **Click the** 

***Ad-Hoc SQL* button.**
The ***Ad-Hoc Search*** page displays.

To Save a Query:

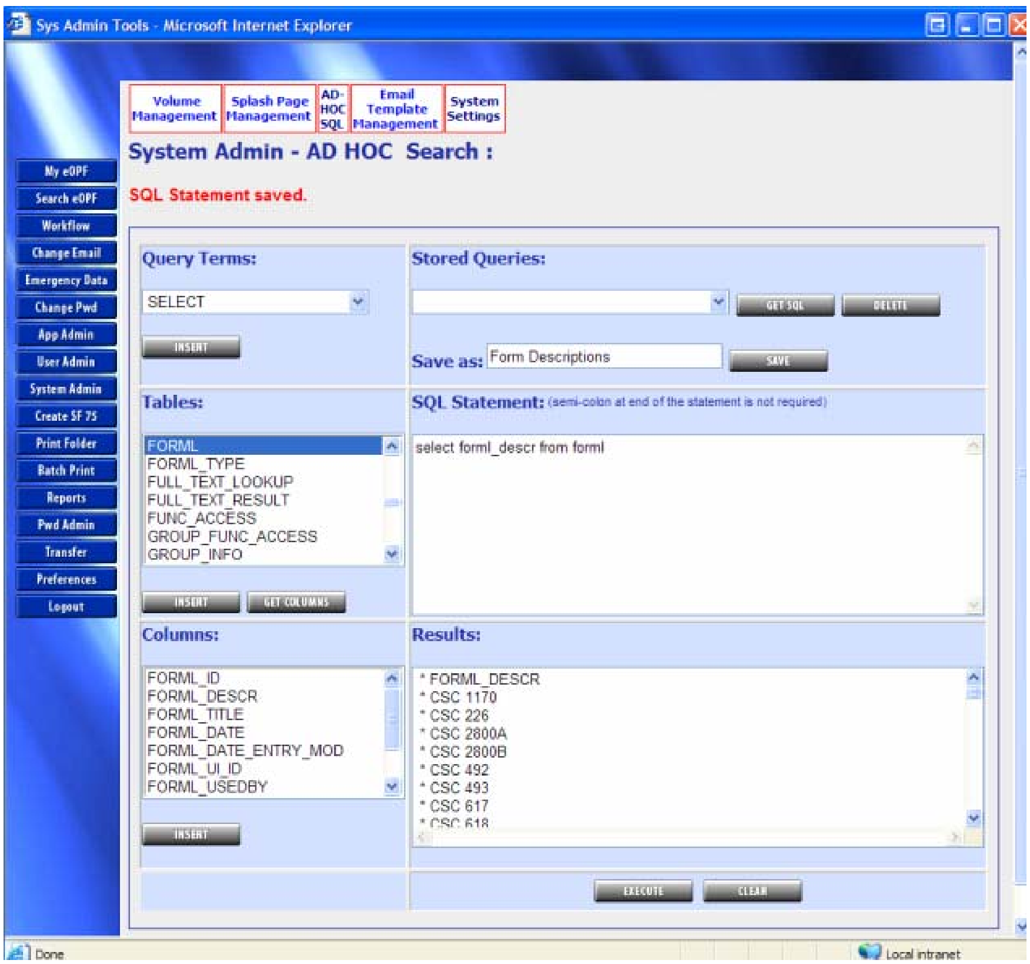
1. **From the *Ad-Hoc Search* page, build a query in the *SQL Statement Free Text* box.**

2. **Execute the query to verify that it is valid and returns the desired results.**

3. **Enter a name for the query in the *Save As:* field.**

4. **Click on the *Save* button.**
   The page refreshes with a message in red at the top indicated that the query was successfully saved.

The following figure displays the ***Ad-Hoc Search*** page with a saved message in red at the top of the page.



To Execute a Saved Query:

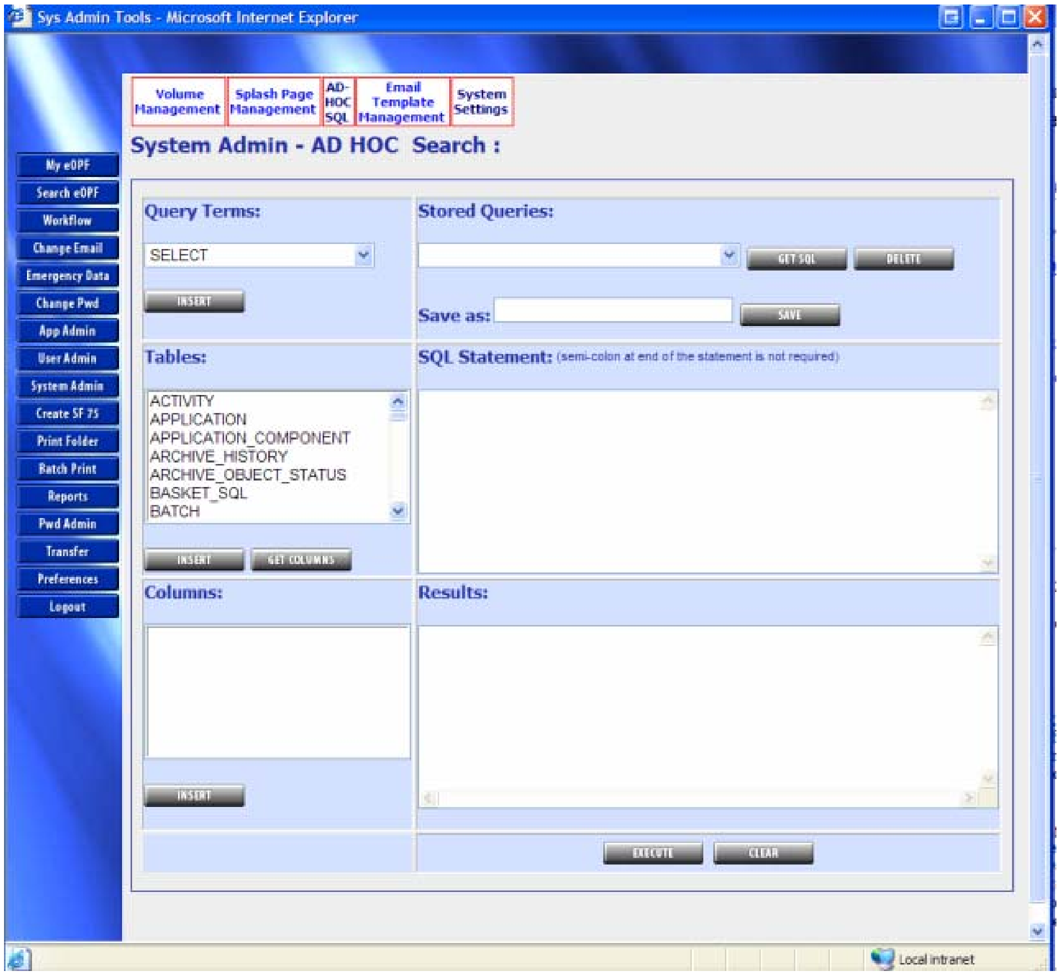
1. **From the *Ad-Hoc Search* page, click on the drop-down list found in the *Stored Queries* section of the page.**

2. **Select a stored query.**

3. **Click on the *Get SQL* button.**

4. **Click on the *Execute* button.**
The results of the query display in the *Results* section of the page.

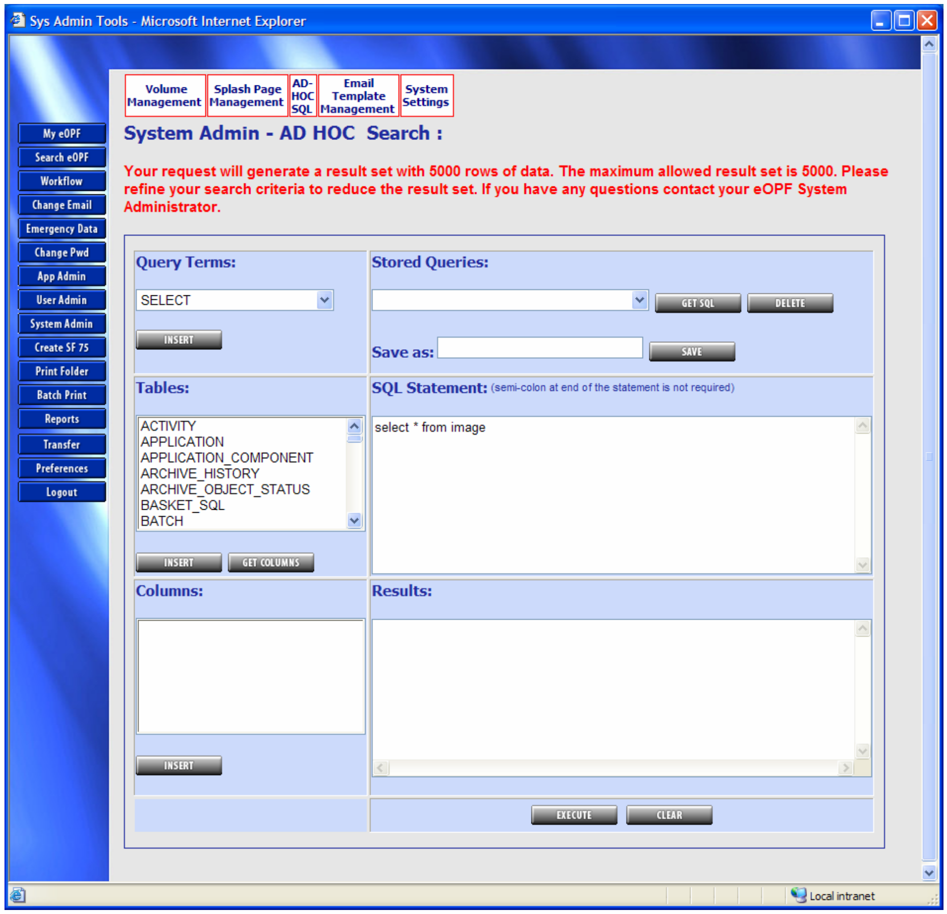
The following figure displays the ***Ad-Hoc Search*** page with search results.



5. **Use the *Cancel* button to return to the *System Admin* page.**

Note:

The results of the query may exceed the eOPF configuration setting limiting query result displayed. If this occurs a message is displayed to the user as seen in the below graphic. The message indicates the maximum result rows allowed.


Sys Admin Tools - Microsoft Internet Explorer
My eOPF
Search eOPF
Workflow
Change Email
Emergency Data
Change Pwd
App Admin
User Admin
System Admin
Create SF 75
Print Folder
Batch Print
Reports
Transfer
Preferences
Logout
Volume Management
Splash Page Management
AD-HOC SQL
Email Template Management
System Settings
System Admin - AD HOC Search :
Your request will generate a result set with 5000 rows of data. The maximum allowed result set is 5000. Please refine your search criteria to reduce the result set. If you have any questions contact your eOPF System Administrator.
Query Terms:
SELECT
INSERT
Stored Queries:
GET SQL
DELETE
Save as:
SAVE
Tables:
ACTIVITY
APPLICATION
APPLICATION_COMPONENT
ARCHIVE_HISTORY
ARCHIVE_OBJECT_STATUS
BASKET_SQL
BATCH
INSERT
GET COLUMNS
SQL Statement: (semi-colon at end of the statement is not required)
select * from image
Columns:
INSERT
Results:
EXECUTE
CLEAR
Local intranet

Email Template Manager

This feature allows administrators to upload Email Notification Templates. Templates are used to generate email messages sent to users and help desk personnel. Currently, three templates are supported by eOPF application and used by email notification services. The 'Document Activity Template' is used to send employees notification of activity within their eOPF. The 'Password Reset User Template' is used to notify a user of a password reset value. The 'Password Reset Staff Template' is used to send an email notification to the help desk when a user requests a password reset but can not provide all the required information.

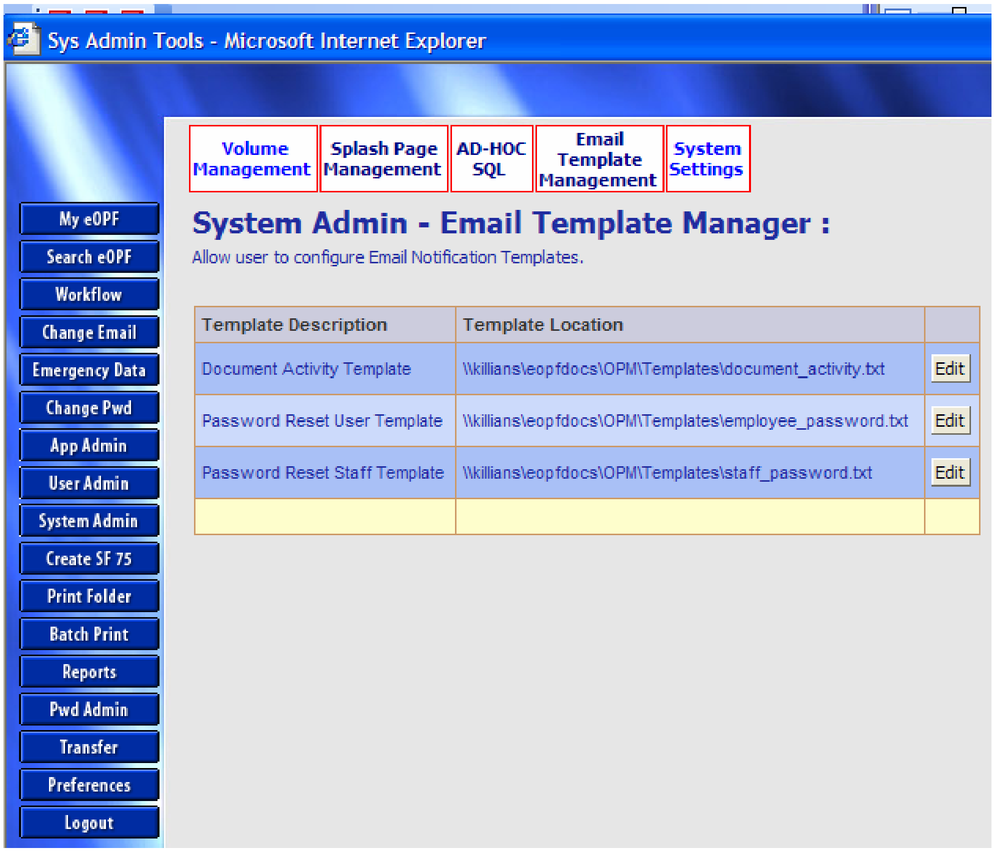
To View Template File Settings:

1. **From the eOPF main menu buttons, click the** 

System Admin button.
The *Volume Manager* tab of the ***System Admin*** page displays by default.

2. **Click the** 

Email Template Management tab.
The Email Template Management page appears.



To change a Template File:

1. **From the eOPF main menu buttons, click the** 

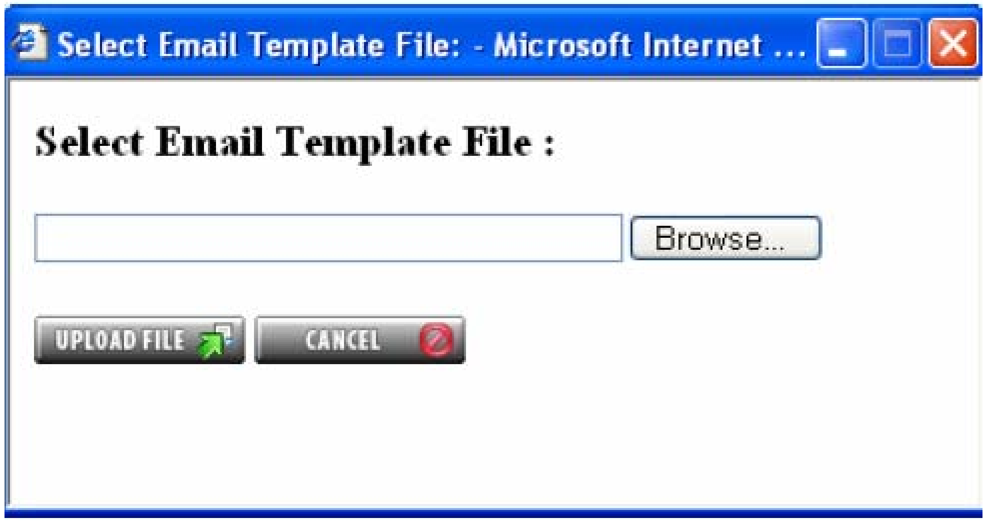
   ***System Admin* button.**
   The *Volume Manager* tab of the ***System Admin*** page displays by default.

2. **Click the** 

   Email Template Management tab.
   The Email Template Management page appears.

3. **Click *Edit* button next to the Template you would like to change.**

4. **Click the *Change File button*.**
   The following screen will pop up.



5. **Browse for the new template and then choose the *Upload File* button.**

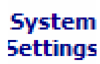
6. **On the Email template screen click the *Update* button when you are satisfied with your changes.**

eOPF System Configuration Settings

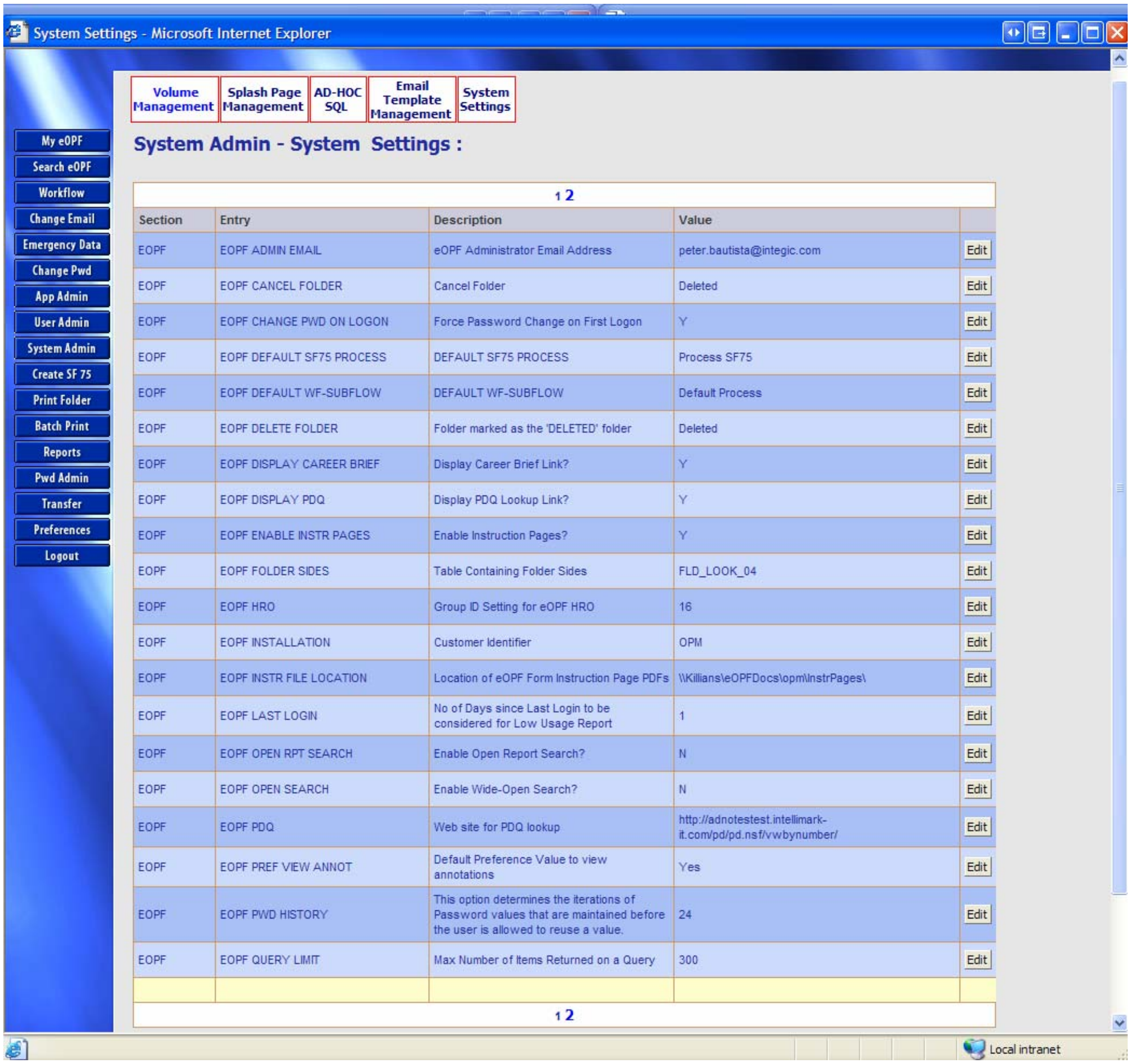
This feature allows administrators to make eOPF application wide configuration changes. Each line item contains a description that explains what the setting does within the eOPF application. You may also reference the eOPF Operations Manual for a complete listing and more detail. **The majority of these settings are configured at installation and should not be altered unless directed by the eOPF deployment team.**

1. **From the eOPF main menu buttons, click the** 

   ***System Admin* button.**
   The ***Volume Manager*** tab of the ***System Admin*** page displays by default.

2. **Click the** 

   System Settings tab.
   The Systems Settings page appears.



3. **Choose which entry you would like to alter.**
   There are two pages of entries to choose from.

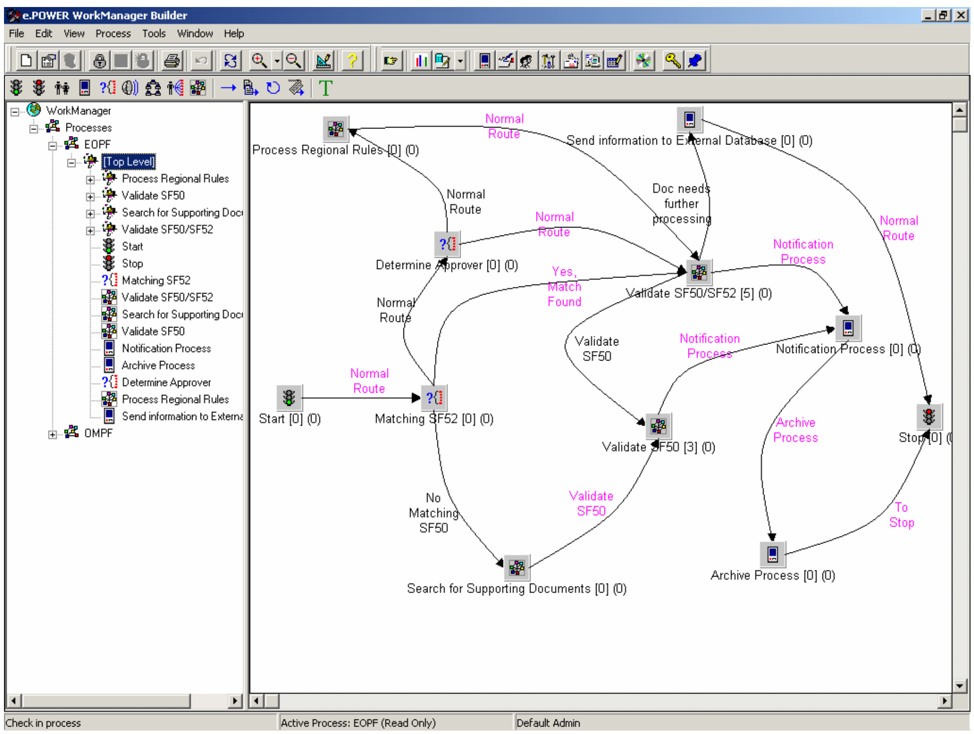
4. **Click on the *Edit* and change the value of the item.**

5. **Click on the *Update* button to update the entry to the new value. Use the Cancel button to abort the change.**

Chapter 19: Workflow

The workflow-centric design utilized in eOPF provides HR staff specific process management, integration-focused business process management (BPM), and robust administrative and task-oriented process tools. Automated decision logic, system interfaces, email notification, fax devices and other devices can be integrated with configurable work processes that are easily created, modified, and maintained by the eOPF administrator.

The eOPF architecture features e.POWER workflow software. A page from the e.POWER WorkManager Builder is shown in the figure below to illustrate the mapping of business processes.



The e.POWER WorkManage Builder component of eOPF provides intuitive drag and drop functionality for the creation of automated workflow processes that emulate and improve on existing business processes. The graphical workflow interface allows the eOPF administrator to create, modify, and maintain process maps. These process maps define the necessary tasks to be performed on documents contained in an eOPF, and route the associated documents through the various tasks in the process. As process maps are created and used, the workflow tool updates data repositories residing in Oracle Relational Database Management System (RDBMS) tables. Audit trails are maintained on each item that moves through workflow.

The eOPF provides Web access for automated workflow capability, which includes the capability to route documents between HR staff members for review prior to storage. The eOPF solution supports the management of workflow at user and system levels. The automated workflow in the eOPF solution supports process automation including authenticating information produced by external systems and automating the retrieval of employee information from these external systems.

Workflows are predefined paths (referred to as process maps) for workitems. Process maps are developed and implemented using WorkManager Builder. Detailed guidance for using the WorkManager Builder is available in the e.POWER Express Desktop User Guide. A brief synopsis is included herein to describe the Workflow functionality.

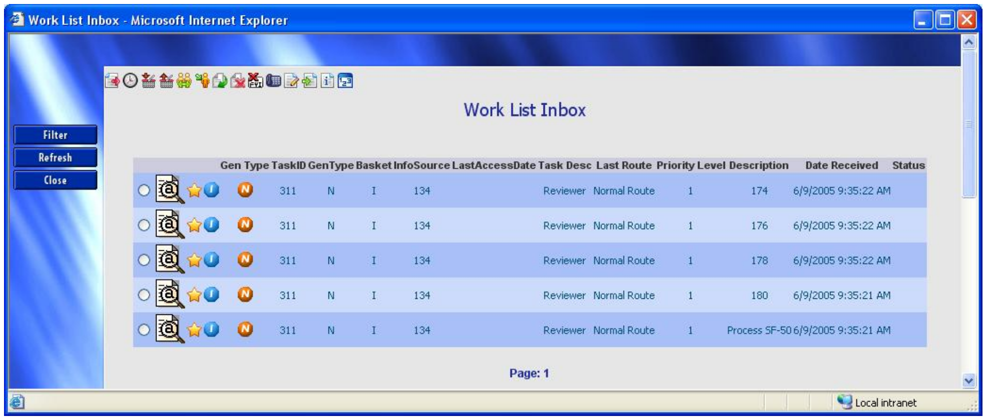
Two types of workflows are available: procedural and ad hoc. Procedural workflows define standard routes for regularly occurring work. Ad-hoc workflows allow the user to create an Assignment List for one-time routing of workitems. At the time of this manual's writing, ad-hoc routing is not supported in the web interface provided by eOPF. The two workflows are not mutually exclusive, ad-hoc tasks and procedural tasks can be included in the same process map.

Worklist and Workitem Display

Workflows have two common elements: worklists and workitems. Worklists are areas that hold workitems. Workitems are units of work within a workflow. In eOPF, a workitem is a document. By default, the system shows items in all your worklists; however, you can change your worklist display.

Worklist Descriptions

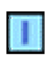
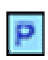
The following figure provides an example of the eOPF Work List.



Note:

When you position your cursor over the worklist type icon and hold it there (referred to as "hovering"), the worklist type displays. Once the worklist type appears, click the primary mouse button to open the workitem.

The following table describes the worklist types available in your worklist. The icon for a worklist is displayed in the second column in the worklist area.

Worklist Type	Icon	Description
In Box		Maintains a list of workitems that require action.
Pending		Maintains a list of workitems for which an action has not been completed.
Copy	n/a	Maintains a list of workitems that have been copied to other users. The icon for items in the Copy worklist represents the worklist in which the original workitem is located. For example, if you send a copy of a workitem from your Pending worklist to another user, the listing in your Copy worklist will have the  icon.
Fetch		Maintains a list from which authorized users can retrieve a workitem.
Distribution		Maintains a list of workitems to be manually distributed.

Workitem Descriptions

Six types of workitems are processed in eOPF Workflow Web. By default, the workitem types appear in different colors in the Worklist Area, but you are able to change these colors to your personal preferences. Workitems that have not been opened appear in bold. After an item has been opened, it is listed in the standard font

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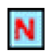
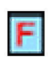
Note:

When you select a workitem from any of your available worklists, the most common action performed is the viewing of the workitem by clicking on the view icon. Based on the review of the document the user releases the document on to the appropriate release route.

This table describes the workitems associated with procedural workflow.

Workitem Type	Icon	Description
Normal		A workitem received through a normal workflow path. The item is available for you to process. The default text color is black.
Copy		A workitem sent to you for review that must be returned to the original owner. The default text color is blue.
FYI		A workitem sent to you for review that you do not need to return to the original owner. The default text color is red.
Returned Copy		A copied workitem that has been returned to you. The default text color is green.
Preview FYI		A workitem that you will receive in the future via an offline route. You can view the item and the associated tasks, but you cannot yet perform any action on the item. The default text color is gray.
Completed FYI		A notification workitem that the creator of the route list receives after each assignment on the route is complete. The default text color is maroon.

Using the In Box

All workitems for you to process appear in your In Box. When an item is in your In Box, you can open it, move it to your Pending worklist for handling at a later date, process it, send it on an offline route, or reassign it. You must have appropriate security privileges for offline routing and reassigning workitems.

Note:

You can quickly sort a work list by clicking on a column header on the ***eOPF Work List*** page.

To View the Contents of the In Box:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

Using the Pending Worklist

The Pending worklist is designed to hold workitems that are in progress but cannot be completed right away. Items in your In Box can be moved to your Pending worklist if you want to work on them at a later time. By moving items that you plan to work on later to the Pending worklist, you keep the In Box available for current information. Once you move an item to the Pending worklist, you cannot move it back to the In Box.

Note:

You can quickly sort a work list by clicking on a column header on the ***eOPF Work List*** page.

To Move a Workitem to the Pending Worklist:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem you want to move to the Pending worklist.**

3. **Click the *Move to Pending* button on the toolbar.**
   A confirmation page asks if you are sure you want to move the workitem.

4. **Click the *Ok* button on the confirmation page.**
   The confirmation page indicates the item has been moved to pending.

5. **Click the *Ok* button to close the message and return to your work list inbox page .**
   The selected workitem is now listed in your inbox as Pending.

Using the Copy Worklist

The Copy worklist is a holding place for workitems that you have copied to other users. When you recall a copy or a copy is returned to you, the notification is displayed in your In Box. Once you delete all returned and recalled copy notifications from your In Box, the workitem is no longer included in the Copy worklist. You can set your worklists to display the number of outstanding copies for workitems.

Note:

You can quickly sort a work list by clicking on a column header on the ***eOPF Work List*** page.

To View the Contents of the Copy Worklist:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

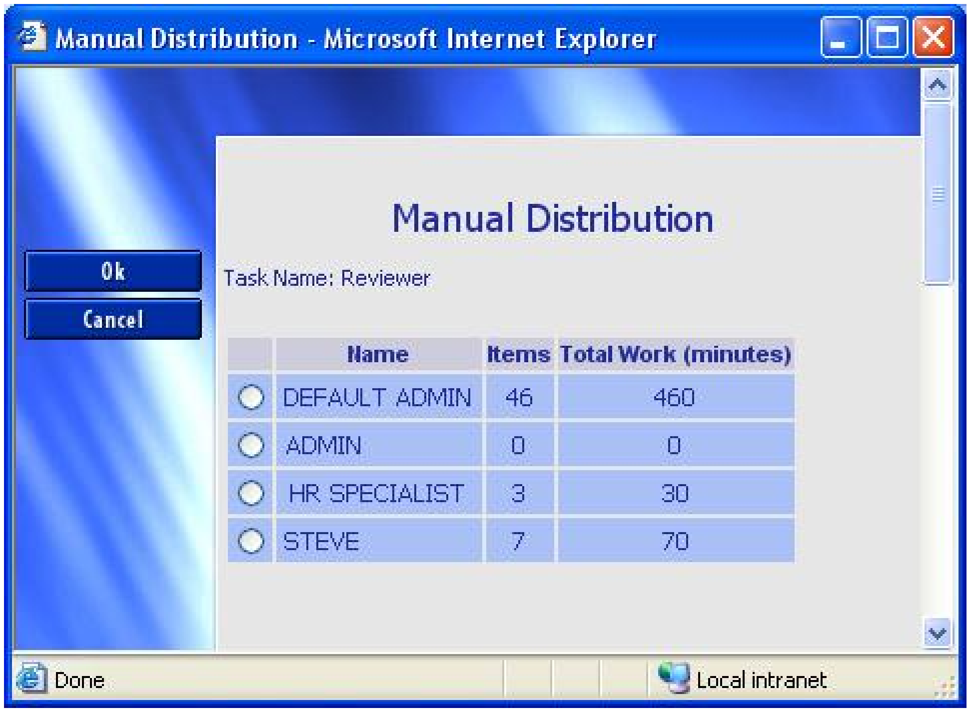
The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

Using the Distribution Worklist

If you are the distributor for a particular task, you receive the workitems in your Distribution worklist. When you access the Distribution worklist, you can assign the workitems for processing to any user who is authorized for that task. Users are designated as distributors and authorized processors in

WorkManager Builder. To distribute workitems, you use the Manual Distribution page.

This figure displays the ***Manual Distribution*** page.



This table describes the screen elements on the ***Manual Distribution*** page.

Element	Description
Task Name	Displays the name of the task.
Available Users List	Name - Lists all the available users authorized to process the workitem. Items - Lists the number of workitems in the user's worklists. Total Work (minutes) - Lists the total time allotted for each user to process the workitems currently assigned to him or her.
OK	Distributes the workitem and closes the page.
Cancel	Cancels the distribution and closes the page.

To Distribute a Workitem:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

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2. **Select the workitem you want to distribute (the workitem must be in the Distribution basket and you must have access privileges to the Distribution basket).**

3. **Click the *Process Workitem* button on the toolbar.**

4. **On the *Manual Distribution* page, select the user from the *Available Users* list.**

5. **Click the *OK* button.**
   The workitem is sent to the selected user's In Box.

Using the Fetch Worklist

The Fetch worklist lists workitems that are ready to be processed by the next available authorized user. It is a holding area from which any authorized user can retrieve a workitem.

When you choose a workitem from your Fetch worklist, it is placed in your In Box for processing; at this point, only you can access the item. You can also return workitems to the Fetch worklist.

Note:

You can quickly sort a worklist by clicking on a column header on the Workflow main page.

To View the Contents of the Fetch Worklist:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

Returning Items to the Fetch Worklist

You can return items to the Fetch worklist from your In Box or your Pending worklist. This makes the workitem available to other users.

To Return a Workitem to the Fetch Worklist:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the *Work List Inbox* page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Click the workitem that you want to return to the fetch queue.**

3. **Click the *Release Workitem* button on the toolbar.**
   The ***Release Workitem*** page opens.

4. **Select *Task Fetch Queue* from the *Select Route* drop-down list.**

5. **Click the *OK* button.**
   The workitem is moved to the Fetch worklist. A message at the top of the worklist confirms the return.

Filtering Workitems within Worklists

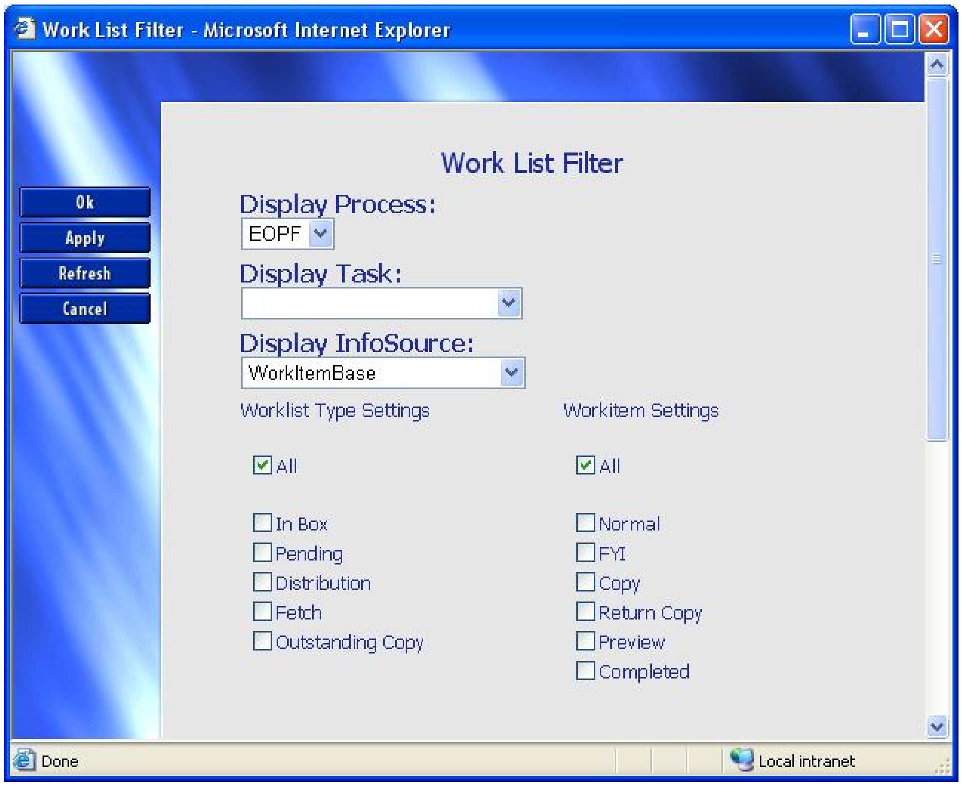
Workflow allows you to set filters to display specific information in your worklists. By default, when the process is selected, all workitem types in the In Box and the Pending worklist are displayed. You can choose which worklist(s) to display. You are also able to set the Display Task and/or the Display InfoSource.

When you set a filter, you force the worklist to display only specified items within a particular task or to display a specific workitem type. For example, you could set your worklists to display only workitems that were sent to you as copies. You work on the *Work List Filter* page when setting display filters.

Note:

You overwrite the Worklist Type Settings the next time you choose a Basket on the Workflow main page.

This figure displays ***Work List Filter*** page.



This table describes the screen elements on the ***Work List Filter*** page.

Element	Description
Display Process	Displays the workflow process you selected on the Workflow main page. Processes correspond to process maps defined by your system administrator in WorkManager Builder. These processes specify the routes that workitems follow as they move through the system. You cannot choose a different process from the ***Work List Filter*** page.
Display Task	Allows you to select which tasks to display. To display all tasks, select the blank space at the

Element	Description
	top of the list.
Display InfoSource	Allows you to select an InfoSource, which determines which columns are displayed in your worklist. You can display all folder types in your worklist or you can choose one of your folder types by selecting the appropriate InfoSource.
Worklist Type Settings	Lists the baskets to display in the main worklist. A check in the box indicates that the worklist will be displayed. You can also choose the worklists to display by selecting an option from the Basket drop-down list on the Worklist page.
Workitem Settings	Lists the available workitem types to display for the chosen worklist(s). A check in the box indicates that the workitem type will be displayed.
OK	Filters the selected component and closes the page.
Apply	Filters the selected component but leaves the page open for additional changes.
Refresh	Resets all fields to their default value.
Cancel	Cancels the filter criteria and closes the page.

To Filter Display Settings:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

---

2. **Click the *Filter* button.**
   The ***Work List Filter*** page opens.

3. **(Optional) Select the task to display from the *Display Task* drop-down list.**

4. **(Optional) Select the InfoSource to use from the *Display InfoSource* drop-down list.**

5. **Select the worklist(s) to display in the *Worklist Type Settings* area.**

6. **Select the workitem type(s) to display in the *Workitem Settings* area.**

7. **Click the *OK* button.**
   The settings are saved and the ***Work List Filter*** page closes.

Releasing a Workitem

When you process a workitem, you send it from the current work state to the next work state depending upon the workitem type. For example, you can release a Normal workitem from your In Box, Distribute a workitem from your Distribution worklist, release a Copy, remove a Returned Copy, etc. In some cases, you can choose from among more than one possible action. For example, you can release a Normal workitem or you can send a copy of the workitem. Actions for processing a workitem are available from the toolbar.

This table specifies the action available for each workitem type.

Workitem Type	**Action**
Normal (In Box)	Release Workitem
Normal (Pending worklist)	Release Workitem
Normal (Distribution worklist)	Distribute Workitem
Normal (Fetch worklist)	Fetch Workitem
Copy	Release Copy
FYI	Remove FYI
Return Copy	Remove Return Copy
Preview FYI	Remove Preview
Completed FYI	Remove Completed FYI

Releasing and Approving a Workitem

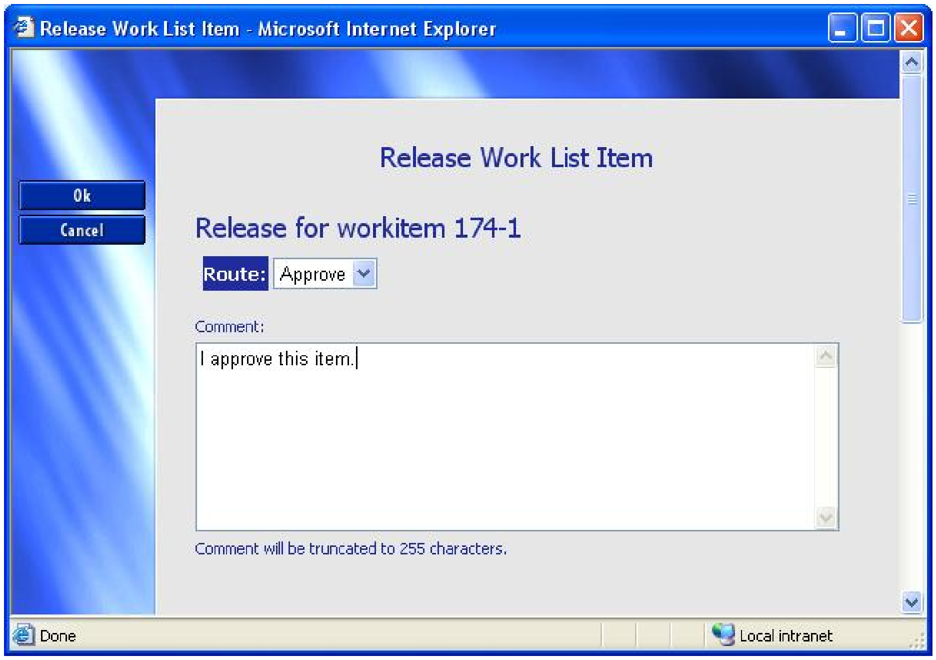
Once you have completed a task for a workitem, such as reviewing, you can release the item to the next task and user or group in the workflow. When you release an item into a route, you are indicating that you have finished working with the item and it is ready for the next phase of the workflow process. You can release Normal, Copy, or FYI workitems from your In Box or Pending worklist.

You may be required to approve a document before it can be released. In addition, you may be required to enter your Personal Identification Number (PIN) before the workitem can be released. Your PIN was set when your user account was created in WorkPlace Manager. See your system administrator if you do not know your PIN.

In eOPF, the release function allows you to release the item to the next task in the workflow. The following procedure describes how to approve a workitem and send it into another task of the workflow. You use the *Release Work List Item* page when approving and releasing items.

Note:
If a workitem has outstanding copies, you must recall the copies before you can release the item to the next step in the workflow. See *Recalling Outstanding Copies* for details.

This figure displays the ***Release Work List Item*** page.



This table describes the screen elements in the ***Release Work List Item*** page.

Element	Description
Release for workitem #	Displays the system-assigned ID for the item to be released.
Route	Allows you to select the next route for the workitem from a drop-down list. In Advanced Offline Routing, if your approval is required for release, the options Approved and Disapproved are listed.
PIN	Allows you to enter your personal identification number to approve the workitem. **This field is only displayed if approval is required.**
Comment	Allows you to enter a comment for the next user.
OK	Releases the workitem and closes the page.

Element	Description
Cancel	Cancels the release.

To Release a Workitem:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the *Work List Inbox* page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select a workitem to release.**

3. **Click the *Release Workitem* button on the toolbar.**
   The Release Work List Item page opens.

4. **Choose a route from the *Route* drop-down list.**
   Available routes vary depending on your task and the application selected. Available paths are determined during the workflow building process.

5. **(If required) Enter your PIN in the *PIN* text box.**

6. **(Optional) Type a comment in the *Comment* text box.**

7. **Click the *OK* button.**
   The selected item is automatically released and cleared from your worklist.

Getting Workitems from the Fetch Worklist

You can move workitems from the Fetch worklist to your In Box if you have appropriate access privileges. Workitems in the Fetch worklist must be released to your In Box before you can process them.

To Move a Workitem from the Fetch Worklist to Your In Box:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

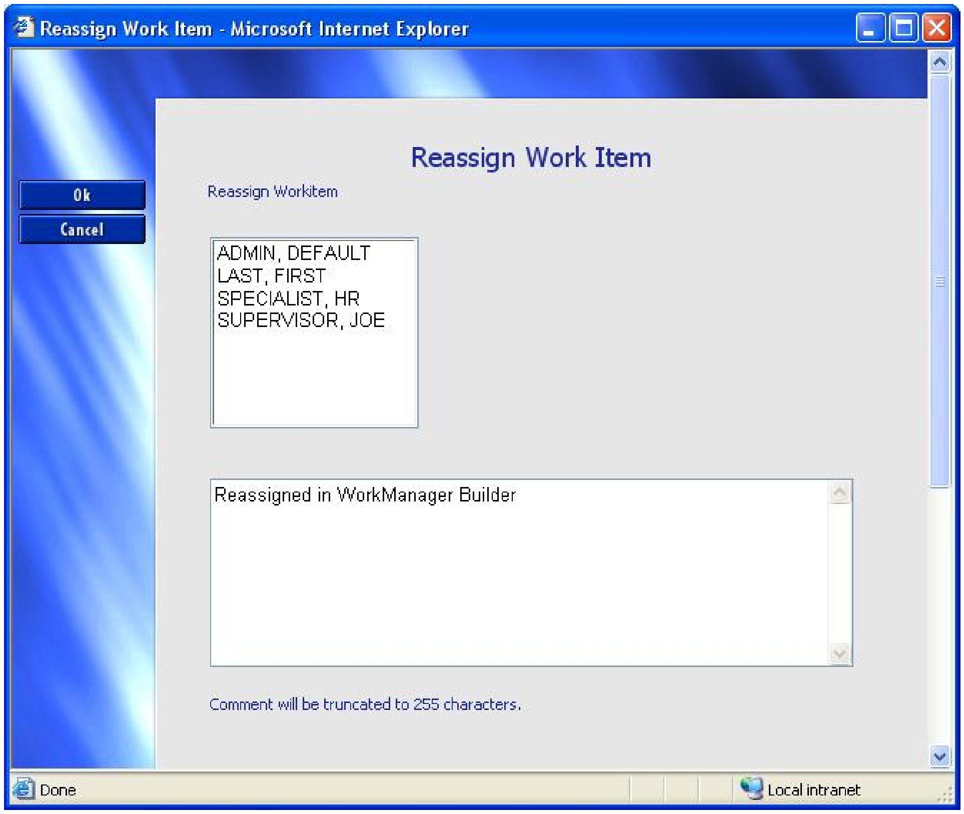
2. **Click the workitem that you want to fetch.**

3. **Click the *Fetch Workitem* button on the toolbar.**
   The workitem is automatically moved to your In Box.

Reassigning Workitems

Workflow allows you to reassign a workitem to a different user. If you have been granted reassigning privileges in WorkPlace Manager, you can reassign any item currently assigned to you. This function is useful, for example, if you are going to be out of the office or if the workitem was routed to you in error. The ***Reassign Work Item*** page is used when reassigning workitems.

This figure displays the ***Reassign Work Item*** page.



This table describes the screen elements in the ***Reassign Work Item*** page.

Element	Description
Users Available	Lists the users to whom you can reassign the workitem.
Comment	Allows you to enter a comment or instructions about the workitem.
OK	Reassigns the workitem and closes the page.
Cancel	Cancels the reassignment and closes the page.

To Reassign a Workitem:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:
The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem to reassign.**

3. **Click the *Reassign Workitem* button on the toolbar.**
   The Reassign Work Item page opens.

4. **In the *Users Available* area, select the *User* to whom you want to reassign the workitem.**

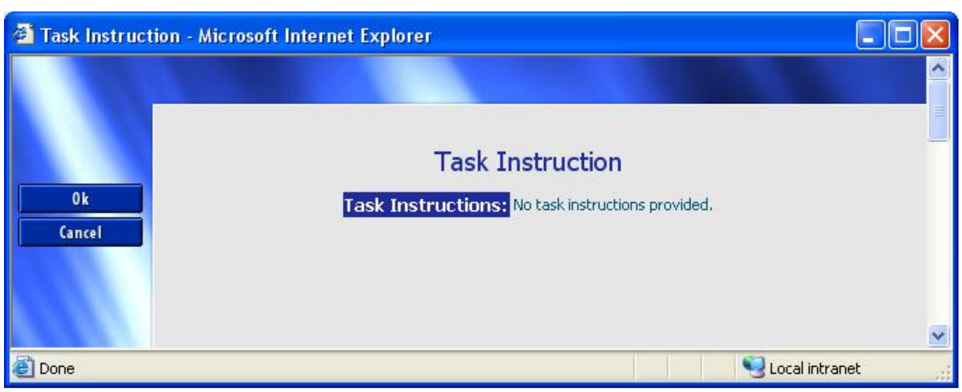
5. **(Optional) Enter a comment for the reassignment.**

6. **Click the *OK* button.**
   The workitem is reassigned and the ***Reassign Work Item*** page closes.

Viewing Task Instructions

Task instructions are special comments attached to a workflow task when the task is created in WorkManager Builder. If a task instruction has been defined, you can view the comment but you cannot edit or delete it. You work on the *Task Instruction* page when viewing instructions.

This figure displays the ***Task Instruction*** page.



This table describes the screen elements in the ***Task Instruction*** page.

Element	Description
Task Instructions	Displays the instructions assigned to the task in WorkManager Builder.

Element	Description
OK or Cancel	Closes the ***Task Instruction*** page.

To View a Task Instruction:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the *Work List Inbox* page.

Note:
The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem for which you want to view task instructions.**

3. **Click the *Task Instructions* button on the toolbar.**
   The *Task Instruction* page opens.

4. **After viewing the task instructions, click the *OK* or *Cancel* button.**

Viewing Workitem Properties

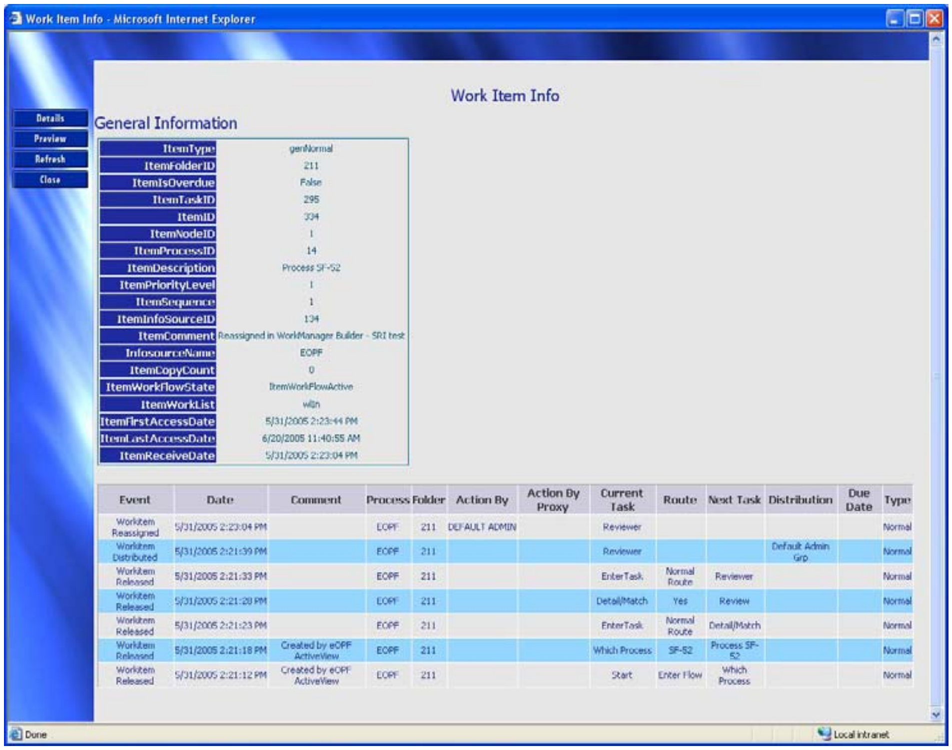
You can view a workitem's properties to obtain useful data about the item, including comments, previous users and actions, receipt and release dates, and the original owner for each task within the workitem; in essence, the workflow history for an item. This function allows you to trace the full path of any accessible procedural workitem.

The ***Workitem Information*** page and the ***Item Properties*** page display the selected workitem details. You can access the ***Workitem Information*** page from the main Workflow worklist.

Viewing Workitem Properties from the Worklist

You can view a workitem's properties to obtain a useful workflow history about an item. You can view comments, previous users and actions, receipt and release dates, and the original owner for each task within the workitem. This function allows you to trace the full path of any accessible workitem.

The ***Workitem Information*** page displays the workitem properties. You can access the ***Workitem Information*** page from the Workflow worklist.



To View a Workitem's Properties from the Worklist:

1. From the eOPF main menu buttons, select the *WorkFlow* button.
A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

---

2. Select the workitem for which you want to want to view the properties.

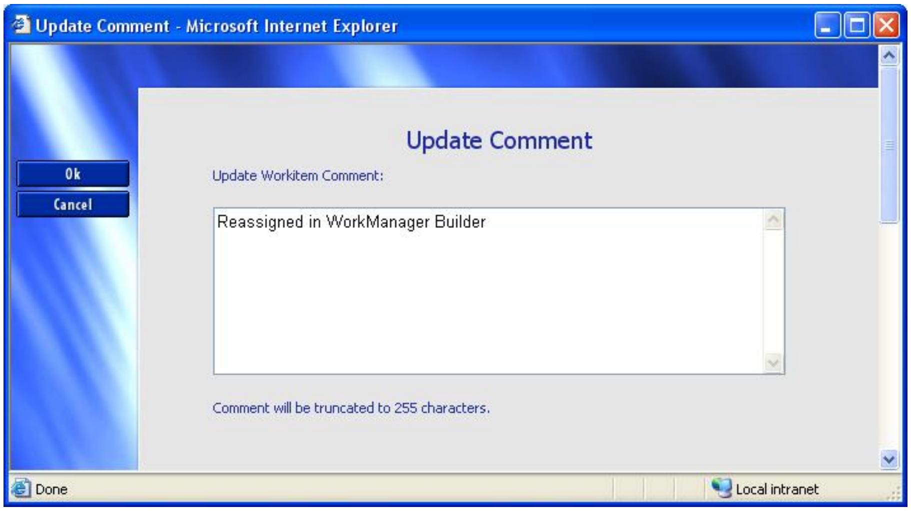
3. Click the *Workitem Properties* button on the toolbar.
The ***Workitem Information*** page opens.

4. After reviewing the Workitem Properties, click the *Close* button.
The Workitem Information page closes.

Working with Comments

Workflow allows you to create a comment to provide instructions or notes for the next person in the workflow or to make notes for yourself about the workitem. A comment is attached to a specific document and remains with the document as it moves through the workflow, unless the comment is deleted. You create and edit comments in the *Update Comment* page.

This figure displays the ***Update Comment*** page.



This table describes the screen elements in the ***Update Comment*** page.

Element	Description
Update Workitem Comment	Allows you to type a comment to attach to the item. Also allows you to edit an existing comment. Comments are limited to 255 characters.
OK	Saves the comment and closes the page.
Cancel	Cancels the comment and closes the page.

To Create a Workitem Comment:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

---

2. **Select the workitem for which you want to create a comment.**

3. **Click the *Update Workitem Comment* button on the toolbar.**
   The ***Update Comment*** page opens.

4. **Type the new comment in the *Update Workitem Comment* text box.**
   The size of the comment is limited to 255 characters.

5. **Click the *OK* button.**
   The ***Update Comment*** page closes.

To Update a Workitem Comment:

1. **From the eOPF main menu buttons select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

---

2. **Select the workitem for which you want to edit the comment.**

3. **Click the *Update Workitem Comment* button on the toolbar.**
   The ***Update Comment*** page opens.

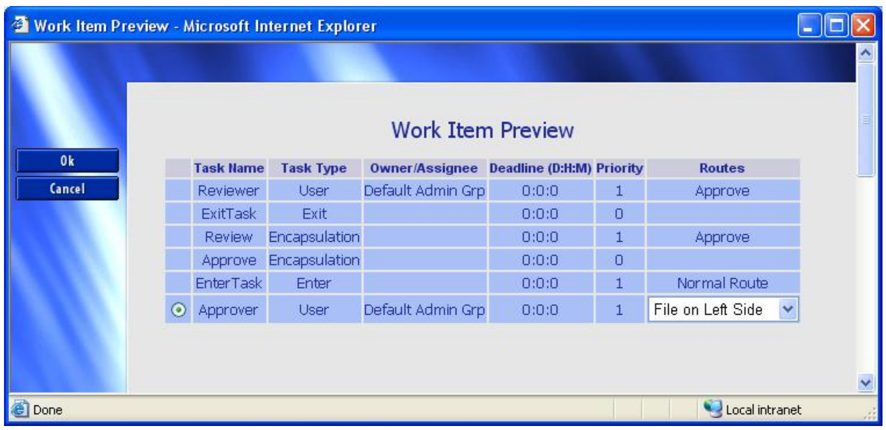
4. **Make corrections to the comment in the *Update Workitem Comment* text box.**
   The size of the comment is limited to 255 characters.

5. **Click the *OK* button.**
   The *Update Comment* page closes.

Previewing a Workitem's Process Route

Workflow allows you to preview the possible routes that a workitem can take. You use the ***Workitem Information*** page and the ***Work Item Preview*** page to preview workitem routes. If a task has only one outbound route, the name of that route is displayed in the Routes column. If a task has multiple outbound routes, a drop-down list of available outbound routes is displayed in the Routes column. When you choose an outbound route from the list, the information for that route is displayed.

This figure displays the ***Work Item Preview*** page.



This table describes the screen elements on the ***Work Item Preview*** page.

Element	Description
Task List	Displays the possible routes and tasks through which the workitem can proceed.
OK	Displays the selected route.
Cancel	Closes the ***Work Item Preview*** page.

To Preview a Workitem's Route:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem for which you want to want to preview the route.**

3. **Click the *Workitem Properties* button on the toolbar.**
   The ***Workitem Information*** page opens.

4. **Click the *Preview* button.**
   The ***Work Item Preview*** page opens.

5. **Click the radio button to the left of the task name for which you want to preview possible routes.**
   A radio button only appears if a task has multiple outbound routes.

6. **Click the *OK* button.**
   The selected route is displayed for preview.

7. **(Optional) Repeat Steps 5 and 6 to view additional routes.**

8. **Click the *Cancel* button on the *Work Item Preview* page.**
   The *Work Item Preview* page closes and the ***Workitem Information*** page displays.

9. **Click the *Cancel* button on the *Work Item Information* page.**

Offline Routing Overview

Workflow provides two modes of offline routing: simple and advanced. Simple offline routing allows you to send a copy of a normal workitem to a user who is not in the workflow. That user is required to return the copy to you before the workitem is released to the next task in workflow. Simple offline routing also allows you to send an FYI copy to a user. FYI copies do not need to be returned. Simple offline routes cannot require action (e.g. signature) by an assignee.

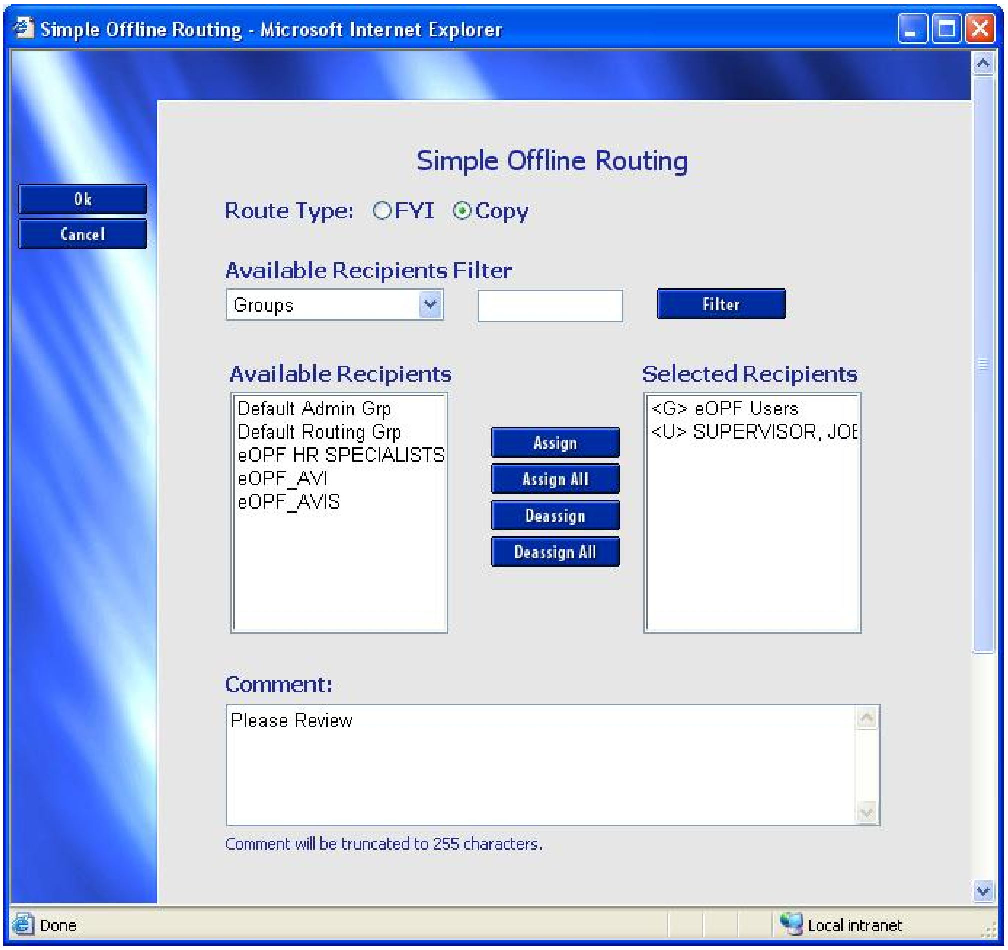
Advanced offline routing allows you to create routes on an ad-hoc basis. Using advanced offline routing, you create an assignment list of users or groups (referred to as assignees) to whom to send the workitem. Advanced offline routing can require action by the assignee. In addition to the main route list, advanced offline routing allows you to create subroutes. You can also save your offline routing assignments by creating and maintaining templates. Advanced Offline routing was not available in eOPF at the time this manual was published.

Both types of offline routing must be enabled for the system in WorkPlace Manager. Simple offline routing can be set to Yes (on) or No (off). Advanced offline routing can be set to Enabled (on), Disabled (off), or Configurable by Task. For the latter setting, offline routing would be enabled or disabled by task using WorkManager Builder.

Simple Offline Routing

Simple offline routing allows you to send a copy of a normal workitem to a user who is not in the workflow. That user is required to return the copy to you before the workitem is released to the next task in the workflow. Simple offline routing also allows you to send an FYI copy to a user. FYI copies do not need to be returned. You use the *Simple Offline Routing* page when sending a copy or FYI workitem.

This figure displays the ***Simple Offline Routing*** page.



This table describes the screen elements in the ***Simple Offline Routing*** page.

Element	Description
Route Types	FYI - Select if you want to send an FYI workitem. Copy - Select if you want to send a copy workitem.
Available Recipients Filter	Displays a list of available users or groups.
Filter	Accesses the ***Users/Groups Selection*** page from which you choose users or groups.
Selected Recipients	Lists the users or groups who are designated to receive an FYI or copy workitem.

Element	Description
>	Moves the selected user(s) or group(s) from the ***Available Recipients*** list to the ***Selected Recipients*** list. To select multiple contiguous rows, select the first row, hold down the Shift key, and select the last row. To select multiple noncontiguous rows, select a row, hold down the Ctrl key, and select other row(s).
>>	Moves all the ***Available Recipients*** to the ***Selected Recipients*** list.
<	Removes the selected user(s) or group(s) from the ***Selected Recipients*** list.
<<	Removes all the users or groups from the ***Selected Recipients*** list.
Comment	Allows you to enter a message for the individuals receiving the workitem.
OK	Sends the selected workitem.
Cancel	Cancels the copy or FYI item.

Sending a Workitem Copy

You can send a copy of a workitem from your In Box or your Pending worklist to someone who has not been assigned to the workflow for processing or review. When you copy a workitem, it is listed in both your In Box and your Copy worklist. The Copy worklist serves as a reminder that there are outstanding copies of the workitem. When the workitem is returned to you, it returns to your In Box as a workitem listed in green. [Green is the default color; you can change the color using the ***Worklist Display Settings*** page.] Items cannot be released to the workflow until the copy has been returned to you or you have recalled outstanding copies. The system automatically removes returned copies from your worklist when you release the workitem. You can also delete them individually.

To Send a Workitem Copy:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem to copy.**

3. **Click the *Simple Offline Routing* button on the toolbar.**
   The ***Simple Offline Routing*** page opens.

4. **Select *Copy* in the *Route Type* area.**

5. **Select the users or groups to receive the workitem.**
   Select the user(s) or group(s) from the *Available Recipients* list.

   Click the > button to add the user(s) or group(s) to the Selected Recipients list. You can also click the >> button to add all users or groups to the *Selected Recipients* list.

   Click the *Filter* button to display the ***Users/Groups Selection*** page from which you can choose additional users or groups. Users or groups you choose on the ***Users/Groups Selection*** page automatically appear in the *Selected Recipients* list on the ***Simple Offline Routing*** page.

6. **(Optional) Type a comment in the *Comment* text box.**
   A comment can provide instructions or notes for the next person to process the workitem you are routing, or it can be used to make notes to yourself about the workitem while you are working on it.

7. **Click the *OK* button.**

Sending an FYI Workitem

You can send any workitem from either the In Box or the Pending worklist as an FYI copy to any user in the workflow. The FYI workitem serves as an informational tool only and does not impact your ability to release workitems.

To Route a Workitem as an FYI Copy:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:
The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem to send as an FYI copy.**

3. **Click the *Simple Offline Routing* button on the toolbar.**
   The ***Simple Offline Routing*** page opens.

4. **Select FYI in the Route Type area.**

5. **Select the users or groups to receive the workitem.**
   Select the user(s) or group(s) from the *Available Recipients* list.

   Click the > button to add the user(s) or group(s) to the *Selected Recipients* list. You can also click the >> button to add all users or groups to the *Selected Recipients* list.

   Click the *Filter* button to display the ***Users/Groups Selection*** page from which you can choose additional users or groups. Users or groups you choose on the ***Users/Groups Selection*** page automatically appear in the *Selected Recipients* list on the ***Simple Offline Routing*** page.

6. **(Optional) Type a comment in the *Comment* text box.**
   A comment can provide instructions or notes for the next person to process the workitem you are routing, or it can be used to make notes to yourself about the workitem while you are working on it.

7. **Click the *OK* button.**

Returning a Copy

You must return a workitem copy to the original owner or originator before the owner can forward the workitem on to the next task in the workflow. Note that FYI workitems do not need to be returned to the owner.

To Return a Copy to the Owner:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem copy that you want to return to the originator.**

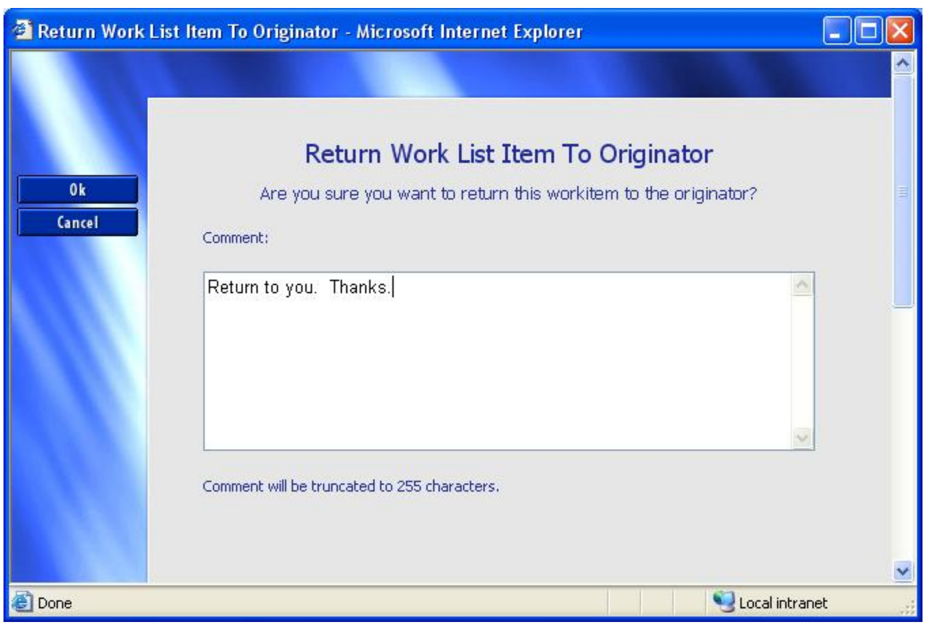
3. **Click the *Return to Originator* button on the toolbar.**

4. **You may see a *Confirmation* page appear asking if you are sure you want to return the copy to the originator. Click *Yes* if you want to return the copy to the originator.**
   The ***Return Copy Comment*** page opens.

Note:

You can uncheck the "***Continue to show this dialog?***" checkbox if you do not wish to see the ***Confirmation*** page in the future.

This figure displays the ***Return Copy Comment*** page.



This table describes the screen elements in the ***Return Copy Comment*** page.

Element	Description
Return Copy Comment	Allows you to enter a comment or instructions about the workitem. Comments are limited to 255 characters.

Element	Description
OK	Returns the workitem to the originator and closes the page.
Cancel	Cancels the release and closes the page.

Recalling Outstanding Copies

You can recall all copies of a workitem that you have routed to other users or groups. Suppose you have distributed copies of a job candidate's resume to six managers. The candidate informs you that she is no longer interested in the position. You could recall all the routed resumes to prevent the managers from spending time reviewing them.

Once you have recalled all copies of workitem, that item is no longer listed in the recipients' In Box. They are, however, still listed in your In Box. The system does not automatically remove returned copies from your worklist, you must delete them. Once you delete all returned copy notifications from your In Box, the workitem is automatically removed from your Copy worklist.

To Recall Copied Workitems:

1. **From the eOPF main menu buttons, select the *WorkFlow* button.**
   A list of the workitems is displayed in the ***Work List Inbox*** page.

Note:

The eOPF ***WorkFlow*** button is only available to users that have been identified as workflow users. This is done by the eOPF administrator in the ***User Manager*** tab of the eOPF ***User Admin***.

2. **Select the workitem for which you want the copies recalled.**

3. **Click the *Recall Outstanding Copies* button on the toolbar.**
   A ***Confirmation*** page asks if you want to recall the copies.

4. **Click the *Yes* button on the *Confirmation* page.**
   The copies are recalled. A message at the top of the worklist confirms the recall.

Chapter 20: Working with Reports

The eOPF system allows eOPF administrators to view, print and export various standardized reports. These reports detail information about various system activities. As there are several report types, the type of report displayed depends on the parameters selected during the generating process.

There are three report groups defined in the standard eOPF solution. The three groups are: Document Access, System Access and System Integrity. Document Access provides reports listing the types of actions taken on eOPF documents, by who, and when. System Access reports detail system access. System Integrity reports are used to confirm that the eOPF repository is undamaged in case of some event such as hardware failure, virus, or intrusion. Additional reports can be added following the steps found in the *eOPF Reports Design and Creation Manual*.

Viewing and Printing Logs and Reports

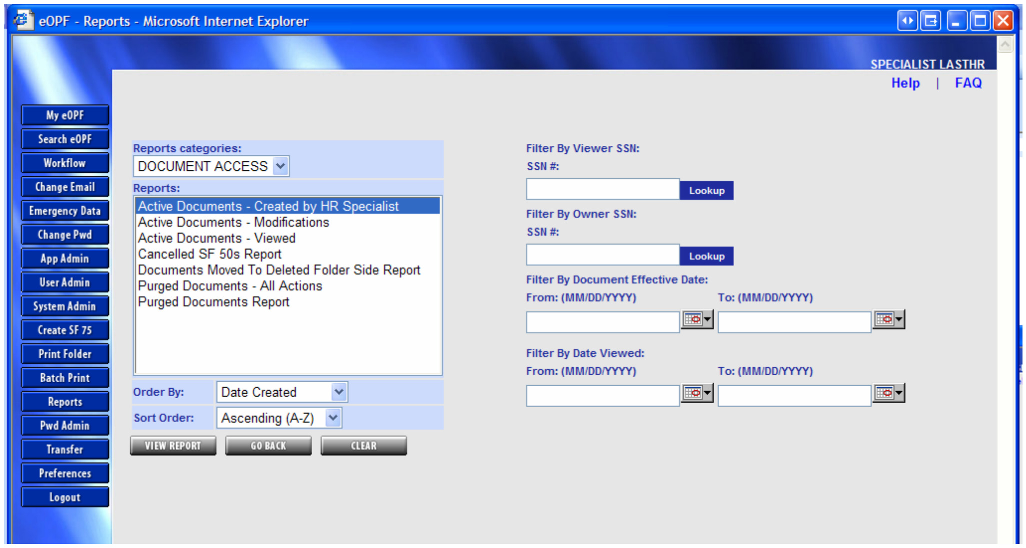
eOPF provides formatted reports of logs such as users logging into the system, failed logon attempts, documents viewed, documents modified, indexes, etc. The information displayed in the report depends on the criteria entered by the user. You are required to enter some search criteria to limit the results returned to a manageable report size.

To View and Print Reports:

1. **From the eOPF main menu buttons, click the** 

Reports button.
The ***Reports*** page appears.

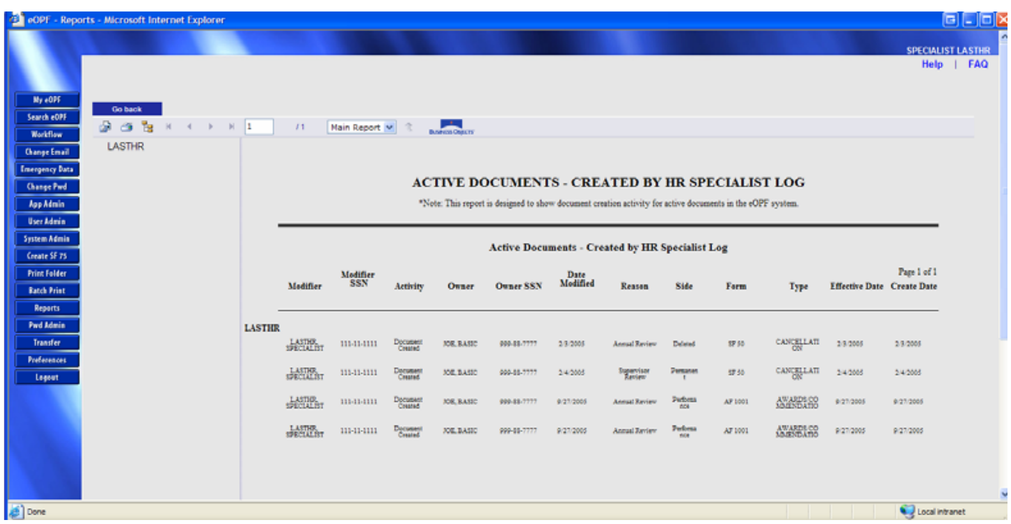
The following figure displays the ***Reports*** page.



2. **Select the *Report Category* from the *Reports categories* drop-down list; then select the desired *Report* and input the *Report filters*.**

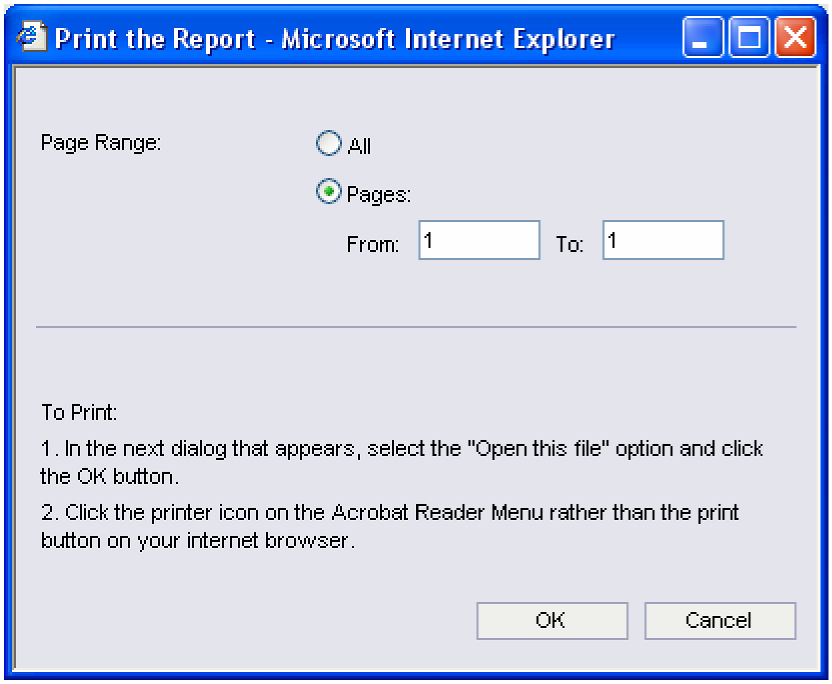
3. **Click the**  ***View Report* button.**
   The report appears.

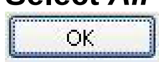
The following figure displays a sample report.



4. **Click the**  ***Print* button.**
   The ***Print Report*** page appears.

The following figure displays the ***Print Report*** page.

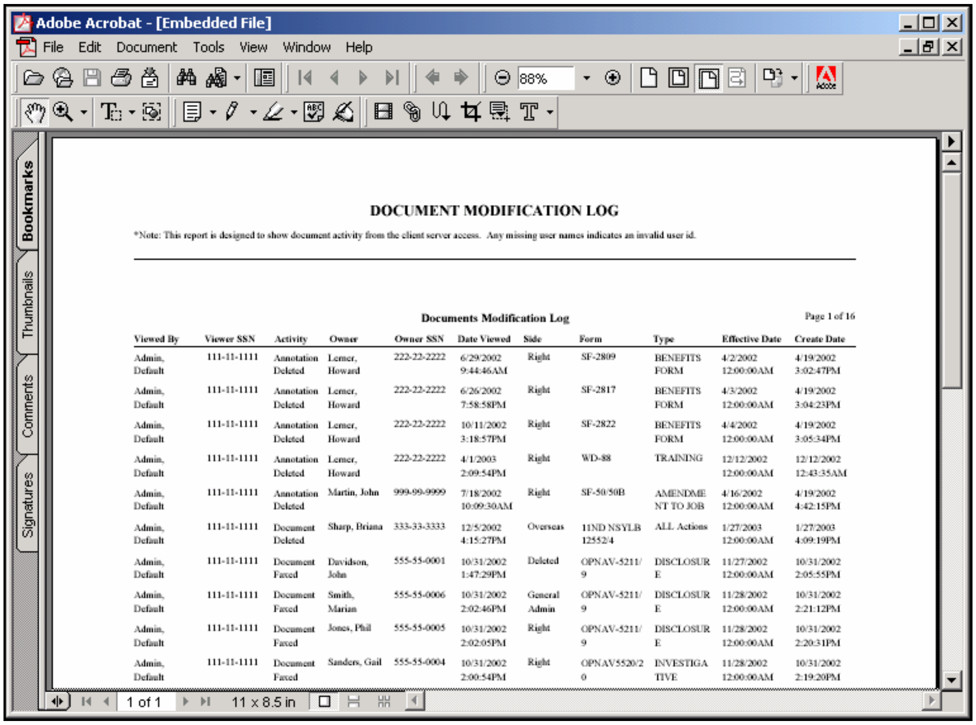


5. Select *All* or a group of pages to print and click the 

***OK* button.**

The report appears in a PDF.

The following figure displays a sample report in PDF.



DOCUMENT MODIFICATION LOG

*Note: This report is designed to show document activity from the client server access. Any missing user names indicates an invalid user id.

Documents Modification Log

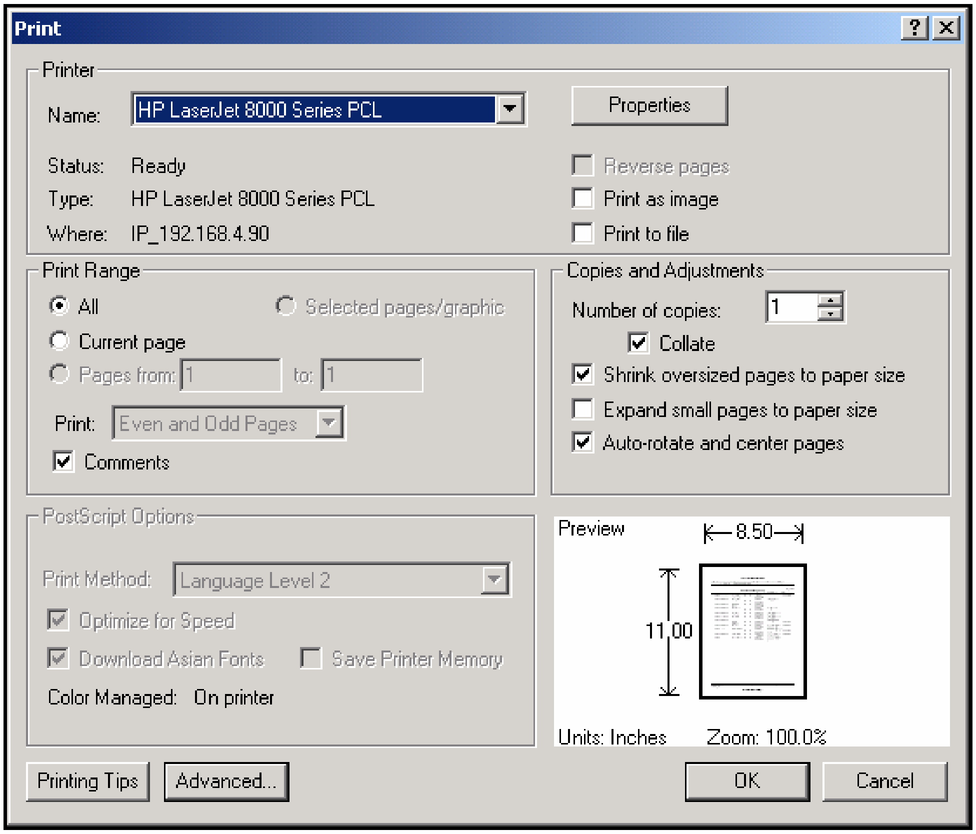
Page 1 of 16

Viewed By	Viewer SSN	Activity	Owner	Owner SSN	Date Viewed	Side	Form	Type	Effective Date	Create Date
Admin, Default	111-11-1111	Annotation Deleted	Lerner, Howard	222-22-2222	6/29/2002 9:44:46AM	Right	SF-2809	BENEFITS FORM	4/2/2002 12:00:00AM	4/19/2002 3:02:47PM
Admin, Default	111-11-1111	Annotation Deleted	Lerner, Howard	222-22-2222	6/26/2002 7:58:58PM	Right	SF-2817	BENEFITS FORM	4/3/2002 12:00:00AM	4/19/2002 3:04:23PM
Admin, Default	111-11-1111	Annotation Deleted	Lerner, Howard	222-22-2222	10/11/2002 3:18:57PM	Right	SF-2822	BENEFITS FORM	4/4/2002 12:00:00AM	4/19/2002 3:05:34PM
Admin, Default	111-11-1111	Annotation Deleted	Lerner, Howard	222-22-2222	4/1/2003 2:09:54PM	Right	WD-88	TRAINING	12/12/2002 12:00:00AM	12/12/2002 12:43:35AM
Admin, Default	111-11-1111	Annotation Deleted	Martin, John	999-99-9999	7/18/2002 10:09:30AM	Right	SF-50/50B	AMENDME NT TO JOB	4/16/2002 12:00:00AM	4/19/2002 4:42:15PM
Admin, Default	111-11-1111	Document Deleted	Sharp, Briana	333-33-3333	12/5/2002 4:15:27PM	Overseas	11ND NSYLB 12552/4	ALL Actions	1/27/2003 12:00:00AM	1/27/2003 4:09:19PM
Admin, Default	111-11-1111	Document Faxed	Davidson, John	555-55-0001	10/31/2002 1:47:29PM	Deleted	OPNAV-5211/ 9	DISCLOSUR E	11/27/2002 12:00:00AM	10/31/2002 2:05:55PM
Admin, Default	111-11-1111	Document Faxed	Smith, Marian	555-55-0006	10/31/2002 2:02:46PM	General Admin	OPNAV-5211/ 9	DISCLOSUR E	11/28/2002 12:00:00AM	10/31/2002 2:21:12PM
Admin, Default	111-11-1111	Document Faxed	Jones, Phil	555-55-0005	10/31/2002 2:02:05PM	Right	OPNAV-5211/ 9	DISCLOSUR E	11/28/2002 12:00:00AM	10/31/2002 2:20:31PM
Admin, Default	111-11-1111	Document Faxed	Sanders, Gail	555-55-0004	10/31/2002 2:00:54PM	Right	OPNAV5520/2 0	INVESTIGA TIVE	11/28/2002 12:00:00AM	10/31/2002 2:19:20PM

6. Click the *Print* button.

The *Print* settings pop-up box appears.

The following figure displays the ***Print*** box.



7. Select the desired print parameters; then click the  ***OK*** **button.**

Exporting Logs and Reports

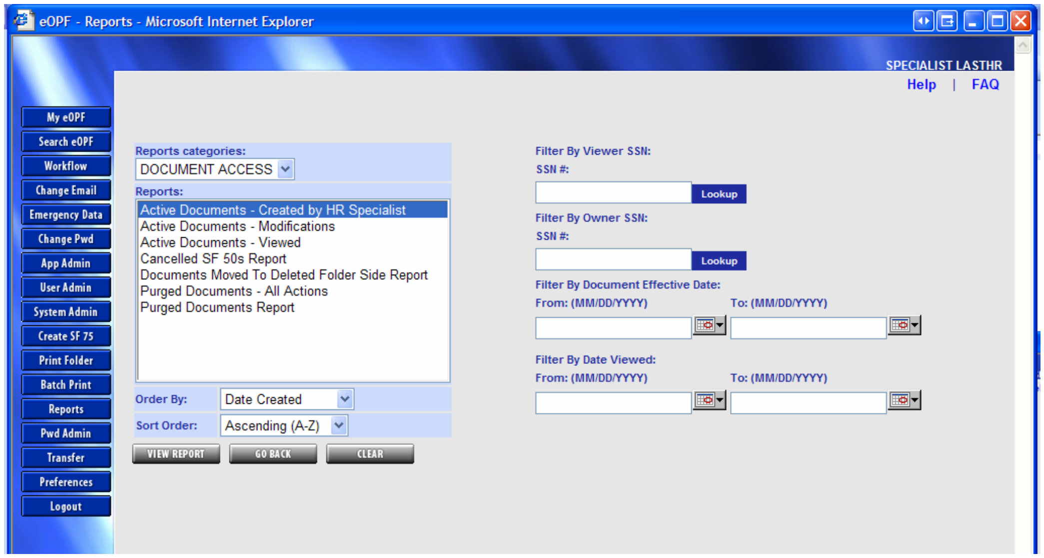
The eOPF system allows eOPF administrators to export the Logs and Reports.

To Export Logs and Reports:

1. From the eOPF main menu buttons, click the  ***Reports*** **button.**

The ***Reports*** page appears.

The following figure displays the ***Reports*** page.

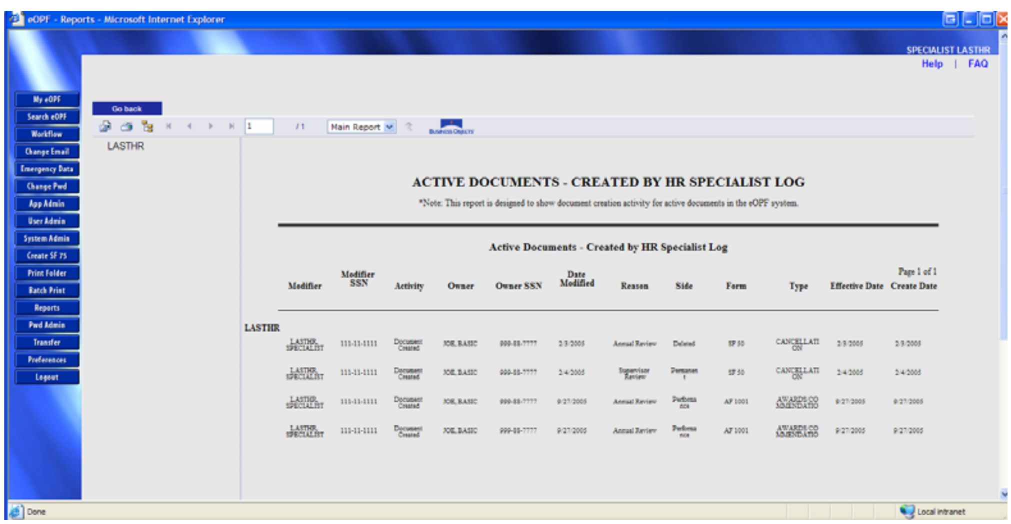


2. **Select the *Report Category* from the *Reports categories* drop-down list; then select the desired *Report* and enter the *Report filters*.**

3. **Click the** 

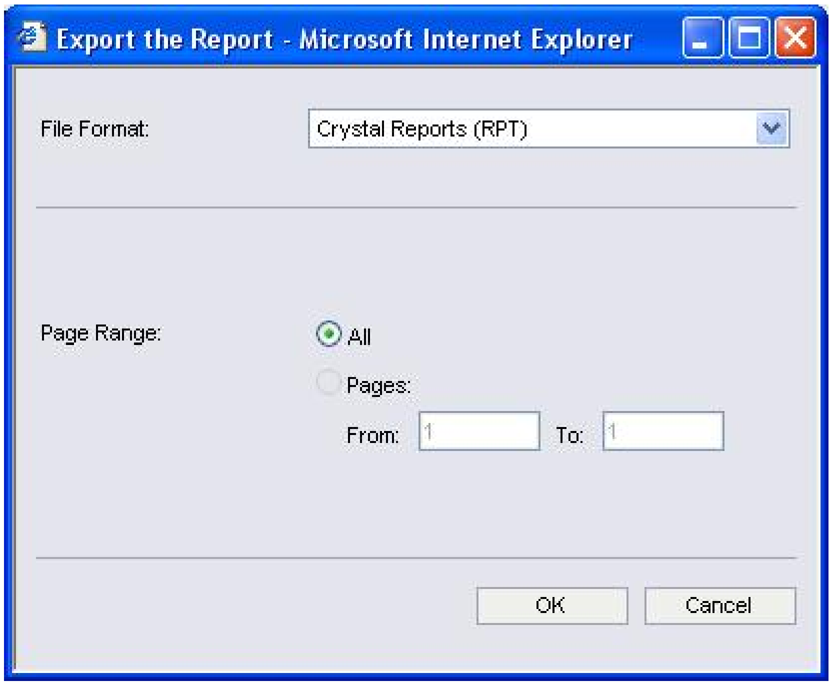
***View Report* button.**
   The report appears.

The following figure displays a sample report.



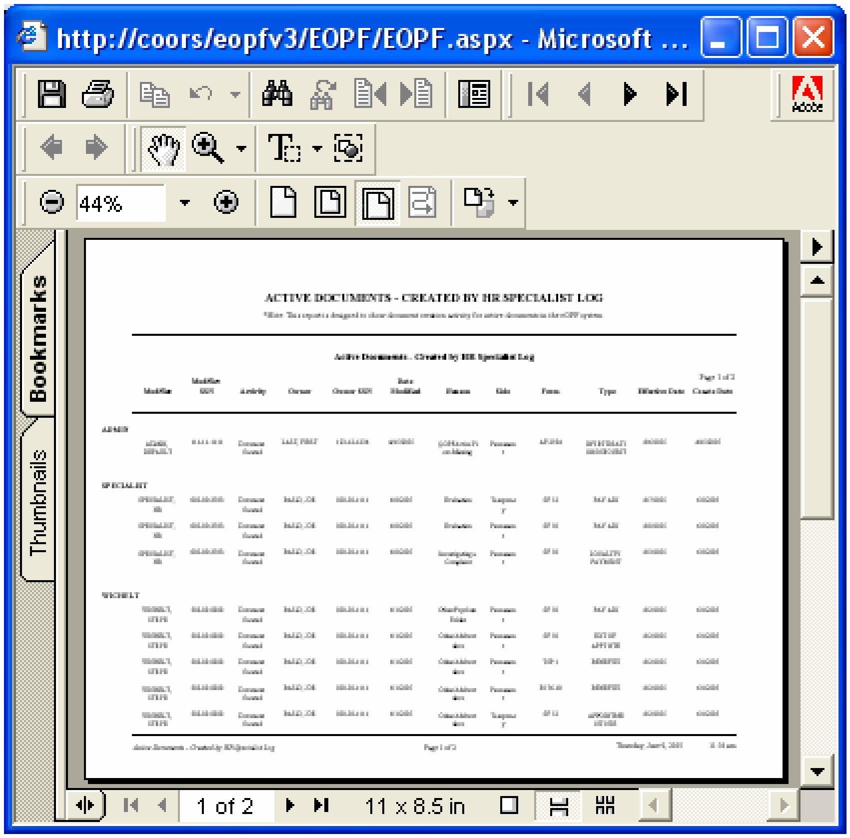
4. Click the  ***Export* button displayed on the report.**
The ***Export Report*** page appears.

The following figure displays the ***Export Report*** page.



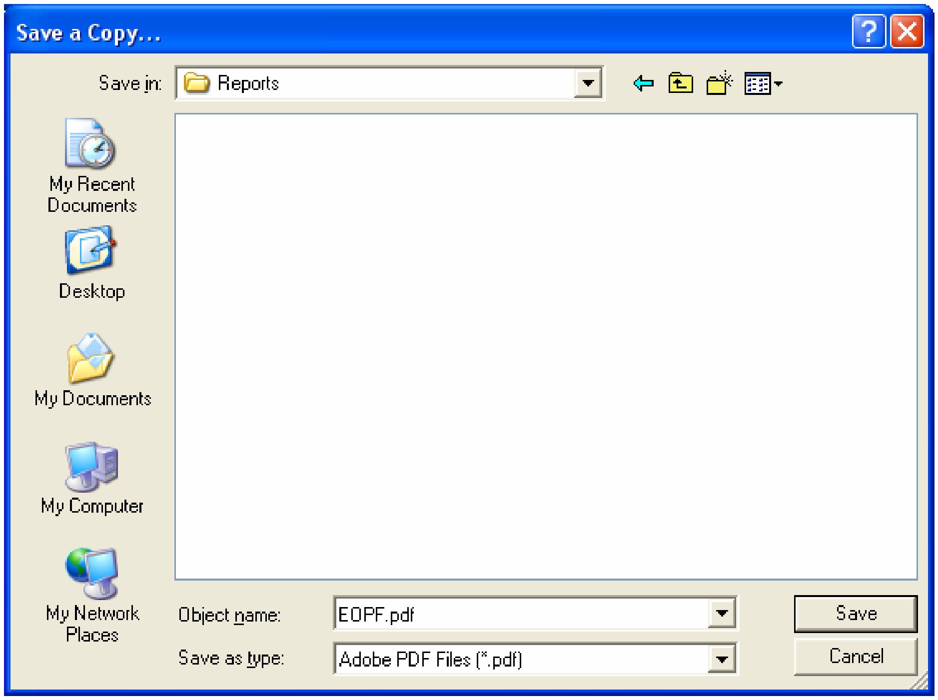
5. Select the export format, and then click the  ***OK* button.**
The report appears in the selected format.

The following figure displays a sample report in the selected format.



6. Select the file save icon.
The *Save As* pop-up box appears.

The following figure displays the ***Save As*** box.



7. Type the desired document *Name*, and then click the 

Save **button.**

Chapter 21: eOPF Transfer Administration

This chapter discusses the eOPF Transfer Administration functionality. The Transfer capability provided by eOPF allows an HR Specialist, with Transfer Capability to electronically transmit an employee's OPF to another eOPF participating agency. Both the losing and gaining agencies must be members of the eOPF application. This module is only accessible to you if you are a member of an eOPF user group that has 'Transfer' privileges.

From within the Transfer module you can:
Initiate a request for an electronic OPF from another agency;
Respond to a request for an electronic OPF from another agency;
Check the transfer history of either a requested or sent electronic OPF;
Confirm receipt of an electronic OPF; and
Recall a request if something prevents the transfer from occurring.

Prior to a transfer, the gaining agency must have created a folder for the employee they are about to gain. The folder creation ocurs when the new employee is included in the gaining agency's employee feed into eOPF. Once the folder exists, the HR Specialist at the gaining agency may request the folder from the losing agency. The losing agency can not electronically transfer a folder until receiving a request from the gaining agency.

When transferring an OPF, the application pre-selects required documents for transfer and allows the losing agency HR Specialist to add additional documents deemed necessary to complete the transfer. If a document is forgotten or an additional document arrives at the losing agency after transfer, the losing agency HR Specialist can transfer additional documents to the gaining agency. The losing agency should ensure that the OPF being transferred contains an up-to-date SF 75 document. This document is automatically placed into workflow at the gaining agency by the eOPF transfer process. This document is routed to an HR Specialist and acts as an indicator that the losing agency has transferred the OPF.

Documents that are transferred from the losing agency are placed in the 'Deleted' folder side at the losing agency. Once the transfer is confirmed by the gaining agency, the losing agency employee folder becomes inaccessible by the employee, who should now be viewing their folder using the gaining agency repository.

Requesting an electronic OPF (Gaining Agency)

eOPF provides an interface to request an OPF from another agency that uses eOPF. The Request Transfer tab is found in the eOPF transfer module available when selecting the 

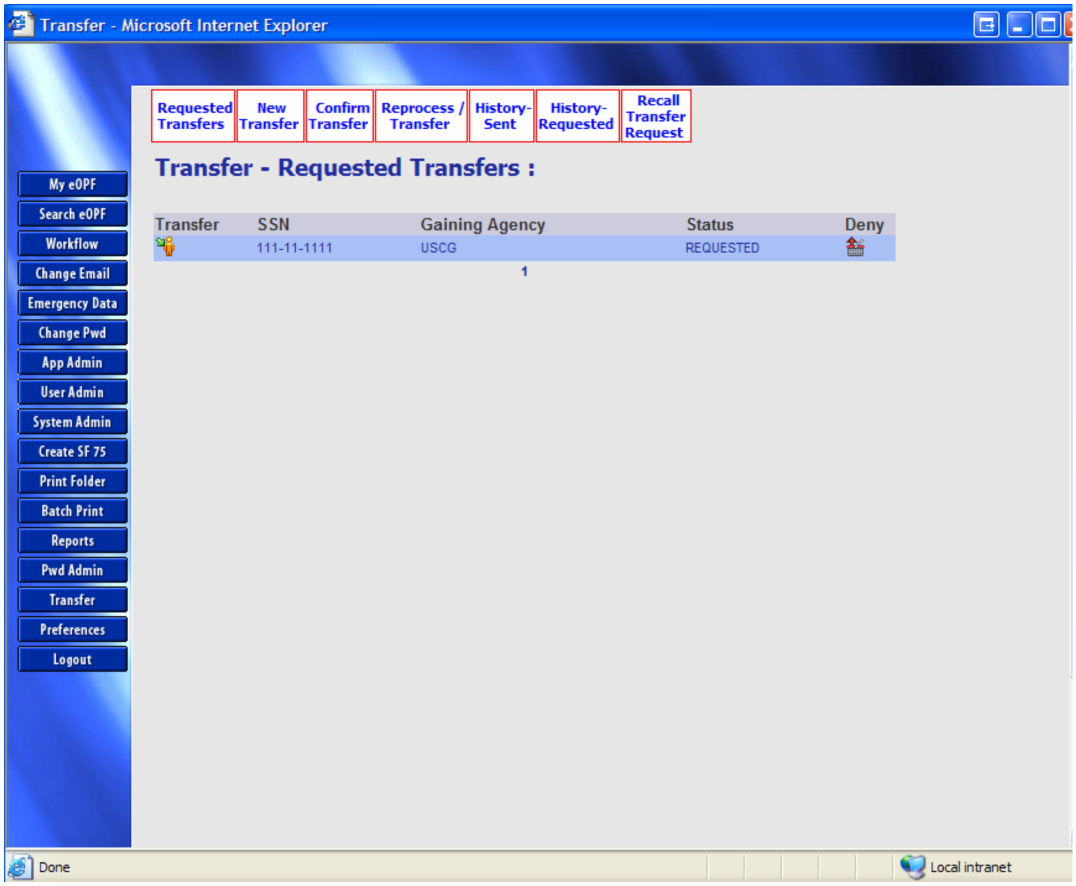
Transfer button on the eOPF main button menu.

To request an OPF from another Agency:

1. **From the eOPF main menu buttons, click the** 

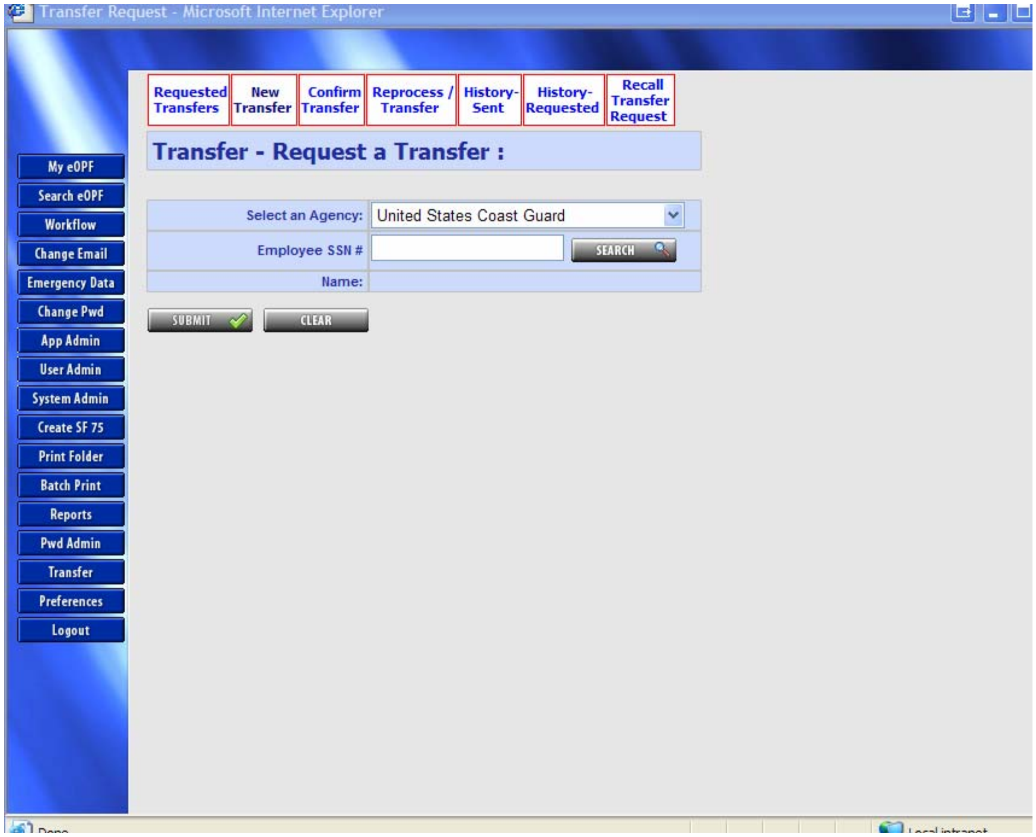
***Transfer* button.**
   The *Requested Transfers* list appears which is the first tab on the ***Transfer Administration*** page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. Select the *New Transfer* tab from the available *Transfer Tabs.*

The *Request a Transfer* page is displayed.



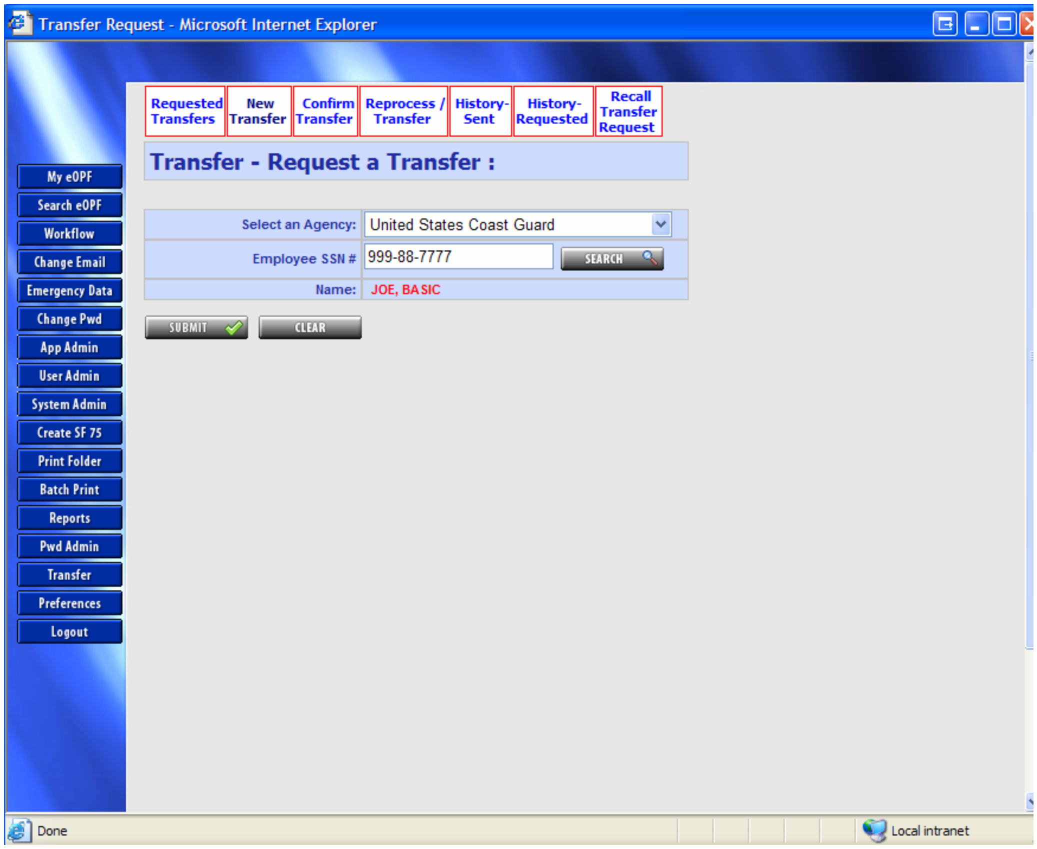
3. Select the desired *Agency* currently holding the employee's OPF from the Agency drop-down list and input the SSN of the employee OPF you wish to transfer into your agency eOPF repository.

Only agencies participating in electronic eOPF will be listed.

4. Click the 

***Search* button.**

You must verify that you have a folder for the SSN you entered. This is required so that the OPF transferred by the losing agency to you has a folder to place the documents.



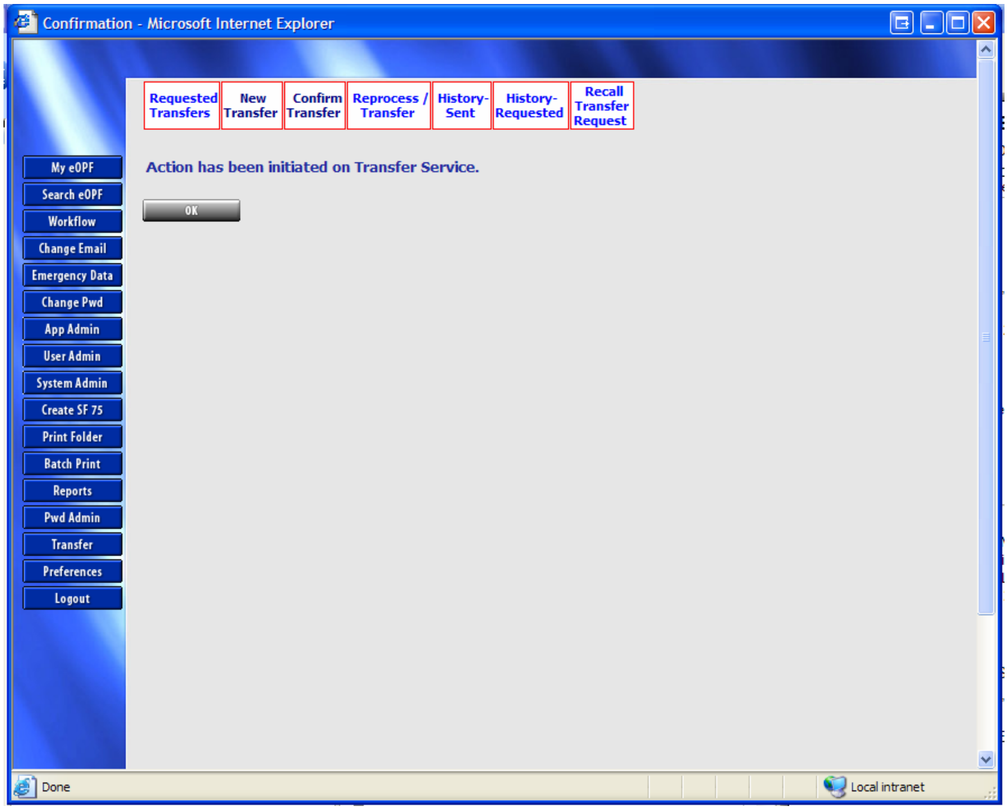
Note:

You must enter a valid SSN and click on the  *Search* button to verify that your eOPF repository has a folder in place and ready to receive documents from the losing agency.

5. Click the  *Submit* button.

If you enter an invalid SSN or forget to search and verify the name associate with the entered SSN, you will receive a warning message.

The following confirmation message is displayed.

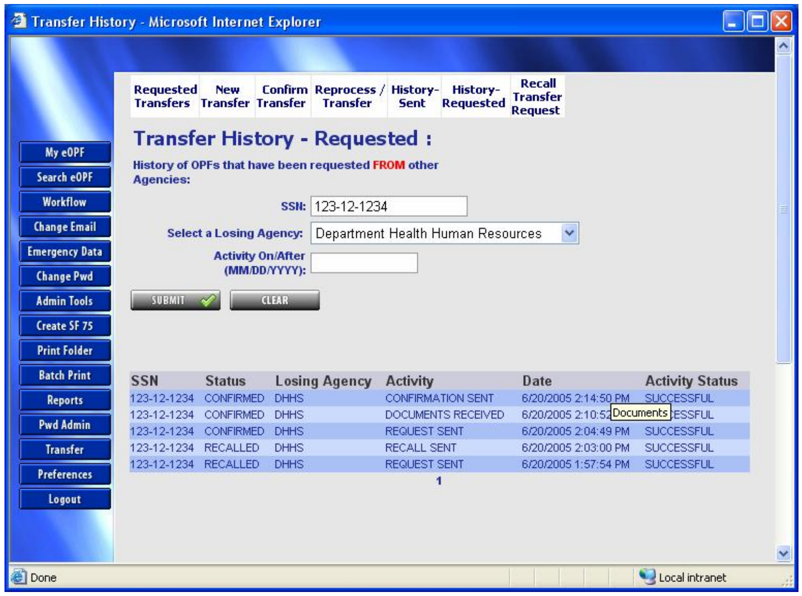


6. Click the 

***Ok* button.**

The request has been sent to the losing agency. You may open the History Requested tab to see that your request has been captured.

The following figure displays the ***Transfer History – Requested*** page.



Processing a Transfer Request

eOPF provides an interface to process a transfer request from another agency that uses eOPF. The Requested Transfer tab is found in the eOPF Transfer Administration available when selecting the 

Transfer button on the eOPF main button menu.

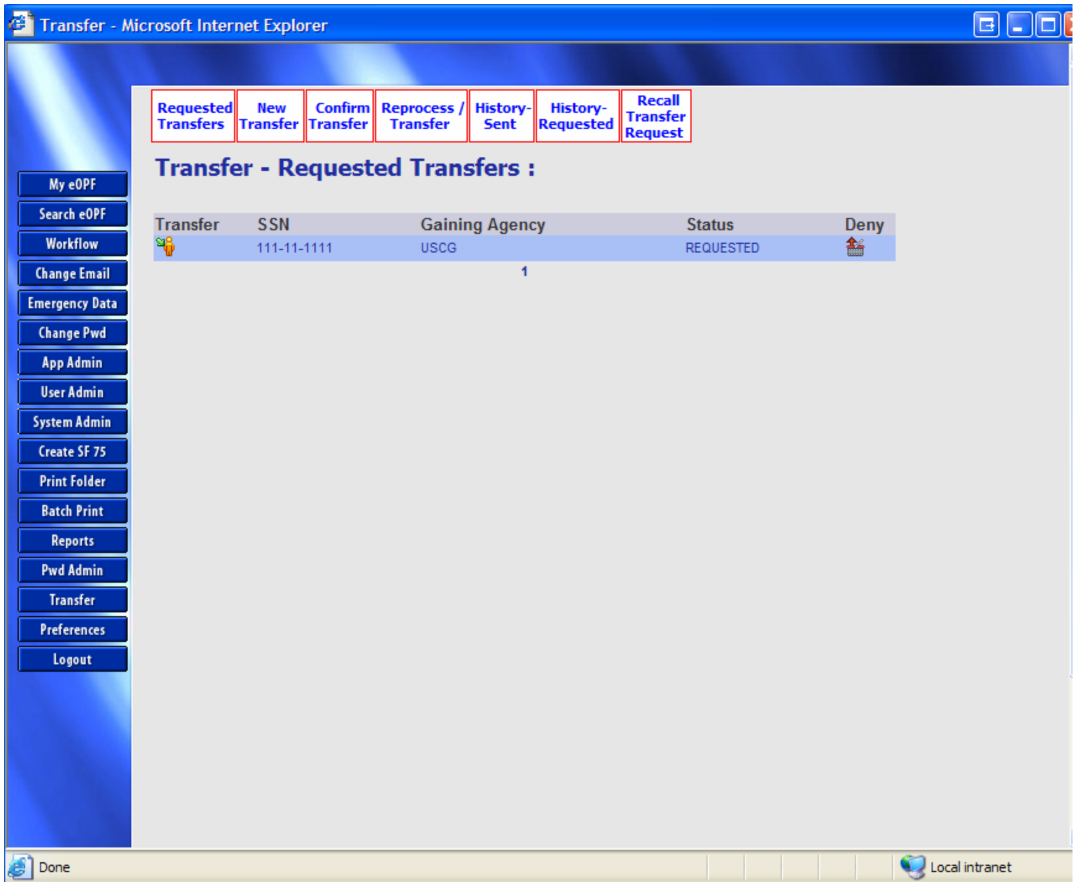
A SF 75 form should exist in the OPF you will be transferring. It will be inserted into workflow at the gaining agency. You can transfer with out the SF 75, however the gaining agency will not be aware of the transfer unless they are actively monitoring their Transfer Request history.

To process a request for an OPF from another Agency:

1. **From the eOPF main menu buttons, click the** 

***Transfer* button.**
The *Requested Transfers* list appears which is the first tab on the ***Transfer Administration*** page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Request Transfers tab active. A single employee OPF has been requested from your agency by a gaining agency (ex. USCG).



2. The list may be empty or provide one or more OPF requests. You may select either the transfer or deny icon for an individual listed SSN.

Note:

Verify that the OPF you are about to transfer has a completed SF 75.

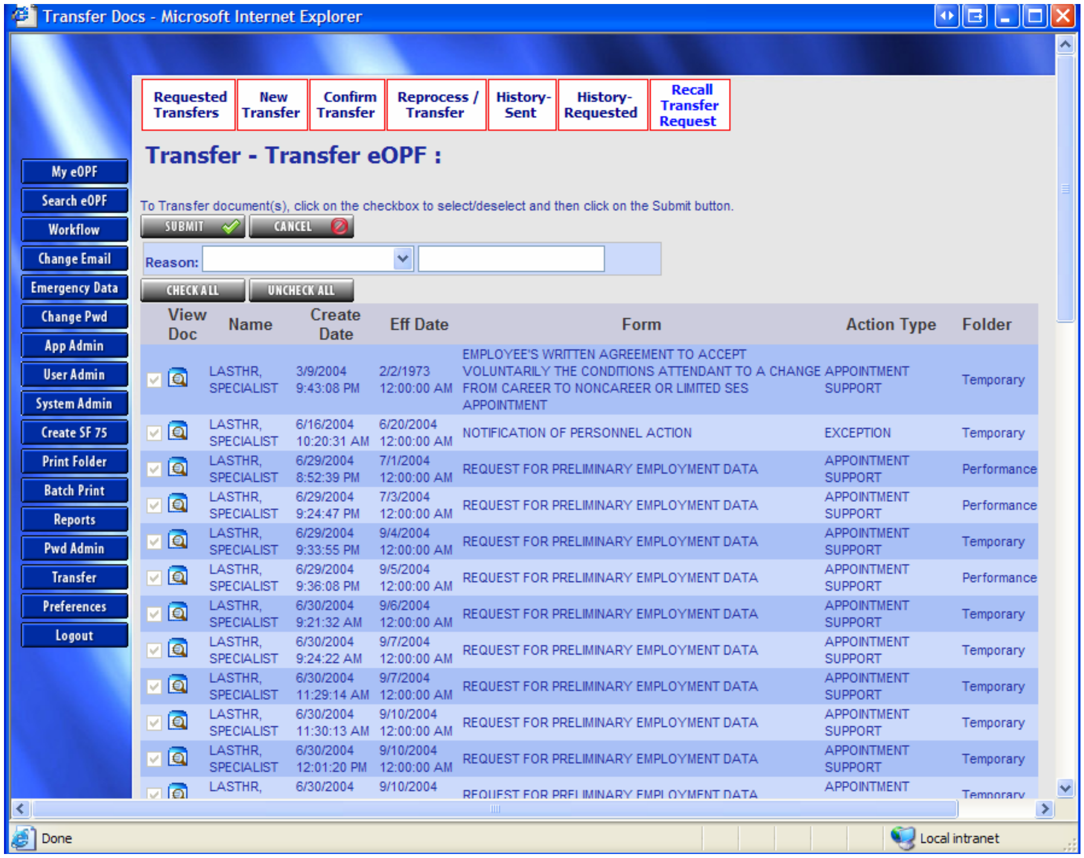
---

3. Click the  Transfer Icon to initiate a transfer to the requesting (Gaining) agency.

You are presented with the contents of the requested OPF.

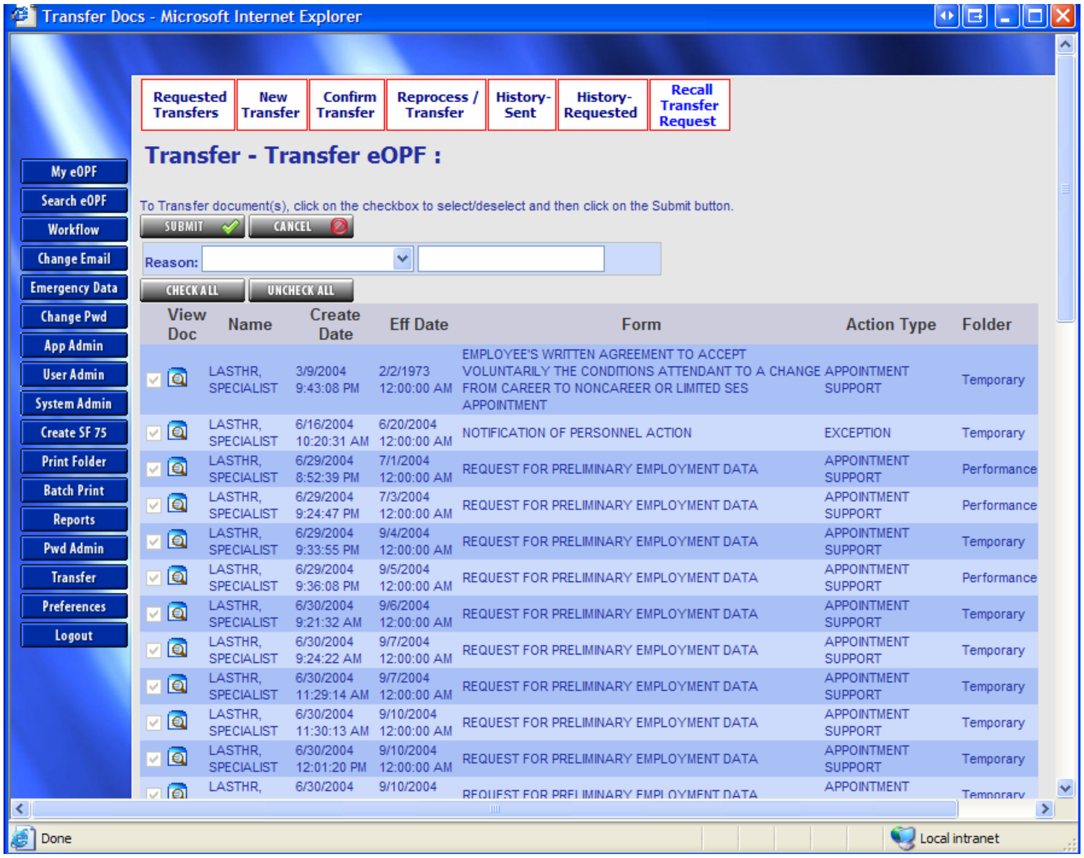
Note:

Selecting the  Deny icon will reject the request and send it back to the requesting agency.



4. Check any documents not pre-selected that must be transferred.

Required documents are pre-selected. You can not override pre-selected documents. You may add additional documents that are not pre-selected to be included in the transfer package by clicking on the check boxes provided.



Note:

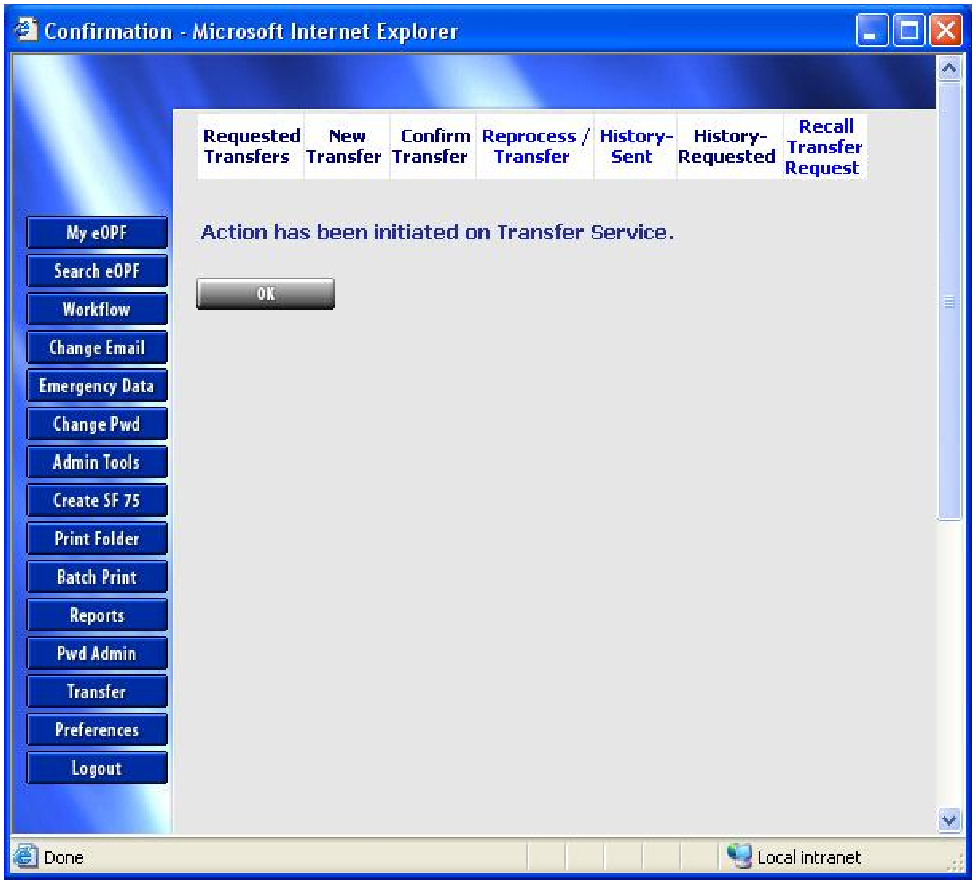
The documents that are pre-selected are identified by the Transfer attribute placed on the document using the eOPF Administration Tools → Forms Administration page.

5. Click the 

Submit **button.**

The eOPF Transfer Service will package the selected documents and send to the requesting agency. This process will take a couple of minutes depending on the number and size of the documents.

The following confirmation message is displayed.

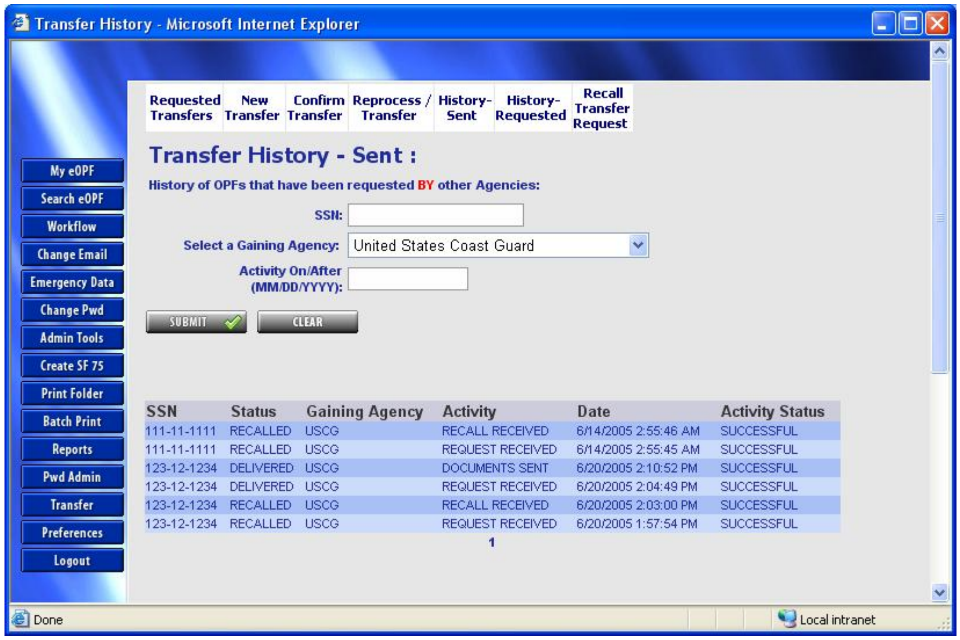


6. Click the 

***Ok* button.**

The Transfer has been initiated and the selected OPF document(s) are being transferred to the gaining (requesting) agency. You may open the History Sent tab to see that your sending action has been captured.

The following figure displays the ***Transfer History – Sent*** page.



Note:
The ***Transfer History – Sent*** page shows the action taken by SSN. The activity column lists action taken by the SSN.

Confirming an OPF Transfer Receipt

eOPF provides an interface to confirm receipt of an OPF from a losing agency. If the OPF contained a SF 75 document, it is placed into workflow as a reminder to the gaining agency that they have received a requested OPF. If no SF 75 existed in the transferred OPF then only the Transfer Request History would indicate that the documents have been sent.

The eOPF Transfer service place all document into the recipient's folder. All documents transferred from the losing agency are placed in the folder side defined as the default folder side at the gaining agency. If any document contains an agency specific Nature of Action Code (NOA) not recognized by the gaining agency then the document is filed as an exception. The gaining agency HR Specialist can decide how to resolve any exceptions created as the result of the transfer.

The eOPF Transfer Administration module is available when selecting the 

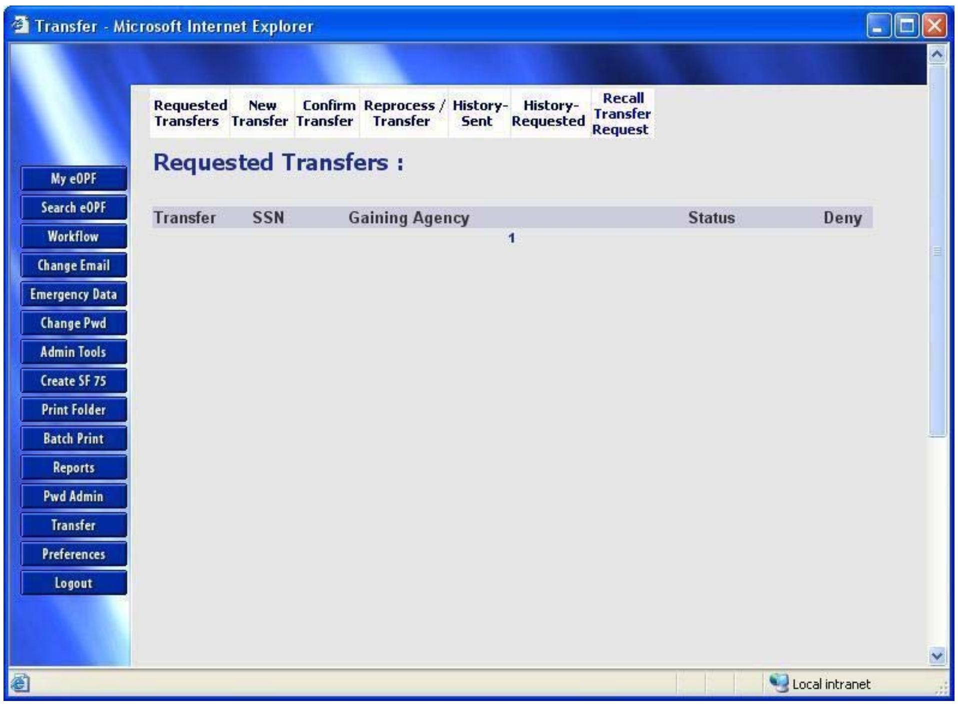
Transfer button on the eOPF main button menu.

To confirm an OPF Transfer Receipt:

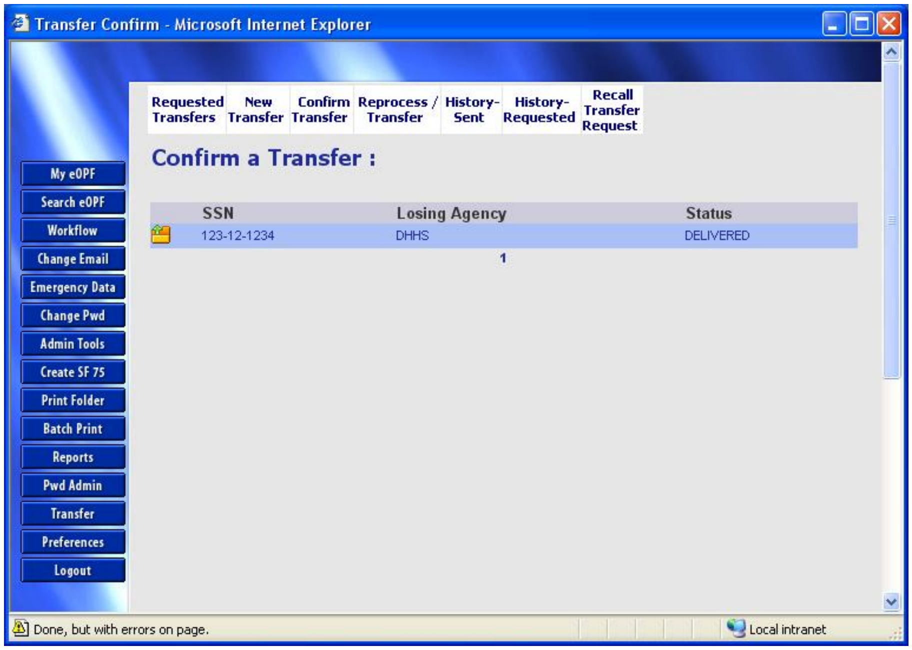
1. **From the eOPF main menu buttons, click the** 

   ***Transfer* button.**
   The *Requested Transfers* list appears which is the first tab on the ***Transfer Administration*** page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. **Select the *Confirm Transfer* tab on the Transfer Administration page.**
   A list of received requested transfers is provided. This list includes the SSN, the losing agency and the status of the request. Status will indicate 'DELIVERED'.



Note:

You can check History – Requested to see if documents have been sent for the OPF you requested.

---

3. Click the  Confirm Transfer Icon to initiate a transfer confirmed message to the sending (Losing) agency.

As the gaining agency, your activities are now complete and you should review the contents of the folder you just received.

Note:

Once you confirm the transfer has taken place the employee folder is no longer available to the employee at the losing agency.

Note:

The Losing agency may send additional documents after the initial transfer if a document is forgotten or arrives late at the losing agency repository.

Recalling an OPF Transfer Request

eOPF provides an interface to recall an OPF transfer request. In the event you make a request for an OPF from another agency that must now be recalled, you can use the Recall Transfer Request tab in the eOPF Transfer Administration module.

The eOPF Transfer Administration module is available when selecting the 

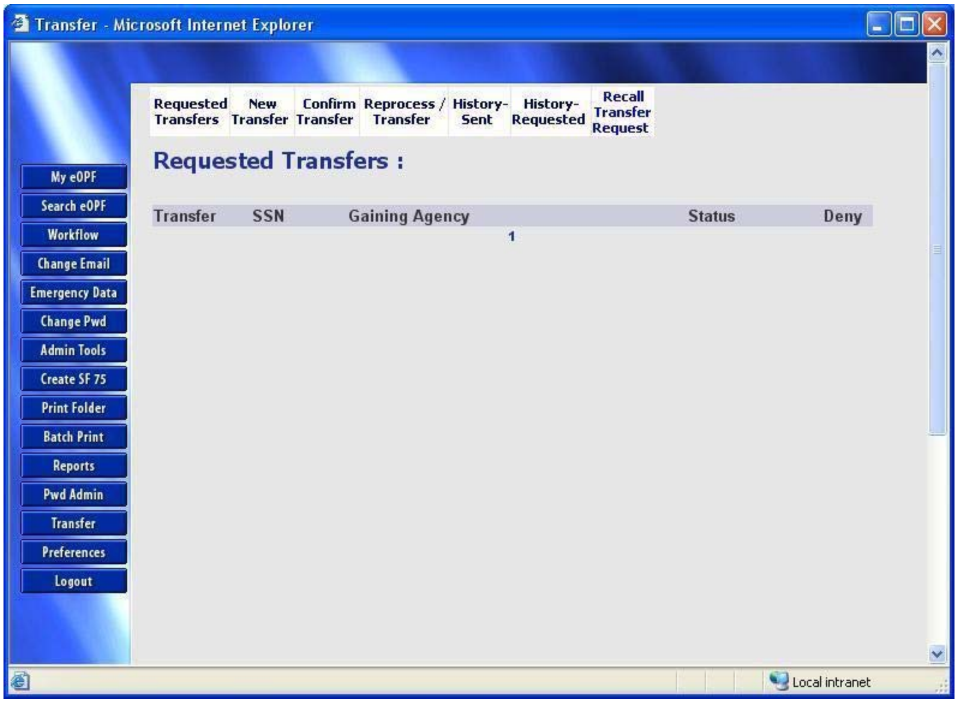
Transfer button on the eOPF main button menu.

To recall an OPF Transfer Request:

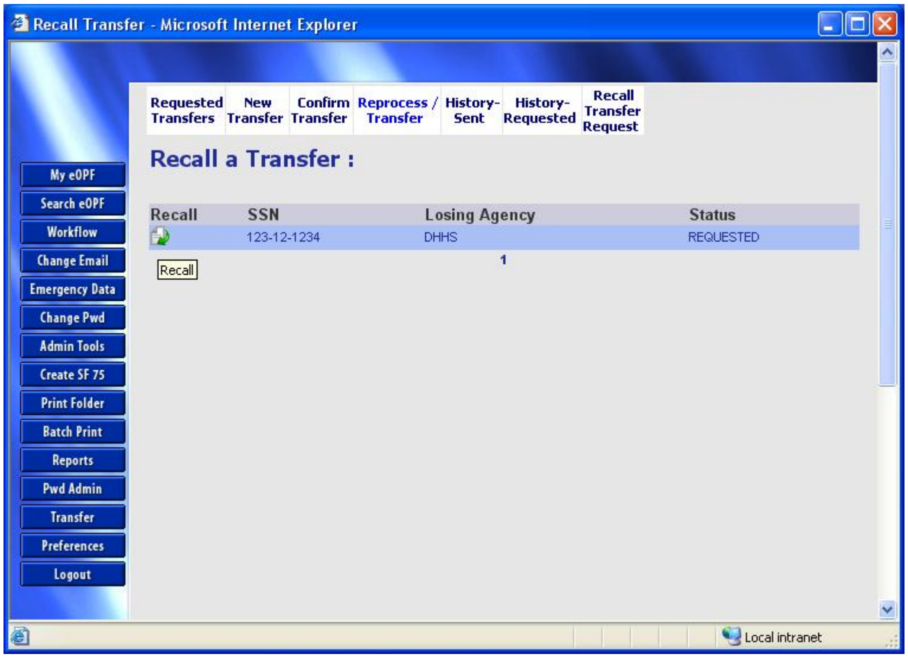
1. **From the eOPF main menu buttons, click the** 

Transfer button.
   The *Requested Transfers* list appears which is the first tab on the ***Transfer Administration*** page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. **Select the *Recall Transfer Requested* tab on the Transfer Administration page.**
   A list of your agency's outstanding requested transfers is provided. This list includes the SSN, sending agency and status.



Note:

You can check History – Requested to see if documents have already been sent for the OPF you requested.

3. Click the  Recall Transfer Icon to initiate a recall message to the sending (Losing) agency. The request is removed and the OPF remains at its current location.

Note:

If the transfer has already occurred you should notify the losing agency to reactivate the folder at there location and you should purge the contents at your location. Careful coordination is required. If the losing agency has already purged the folder then you will need to transfer back to that agency.

Reviewing Transfer History - Requested

There are two types of history maintained by eOPF regarding transfer. You have history for Requested Transfers and history for Sent Transfers. A requested transfer is the result of you making a request for an OPF to another agency. To access Transfer History – Requested you must access the eOPF Transfer Administration module. The eOPF Transfer

Administration module is available when selecting the 

Transfer button on the eOPF main button menu.

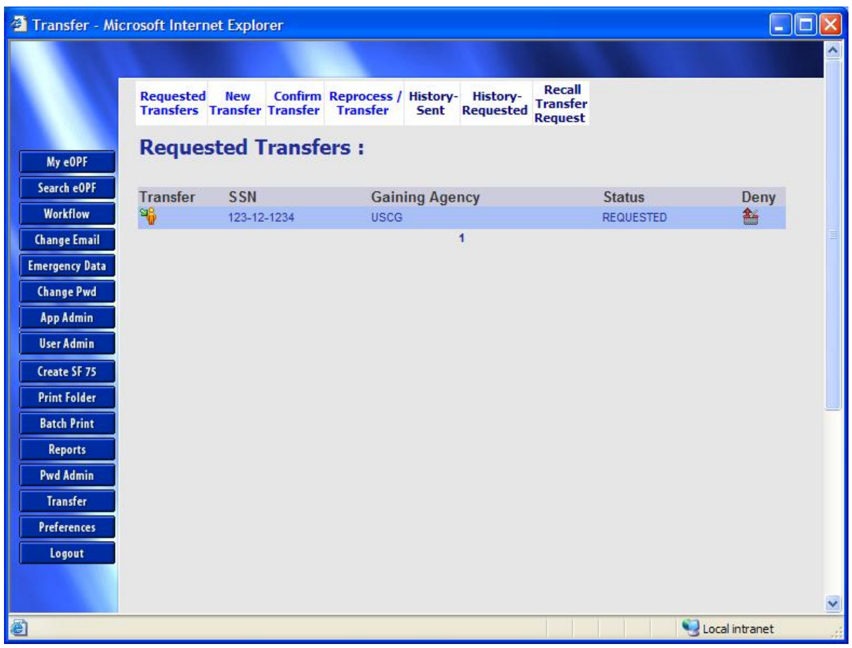
To review Transfer History - Requested:

1. From the eOPF main menu buttons, click the 

***Transfer* button.**

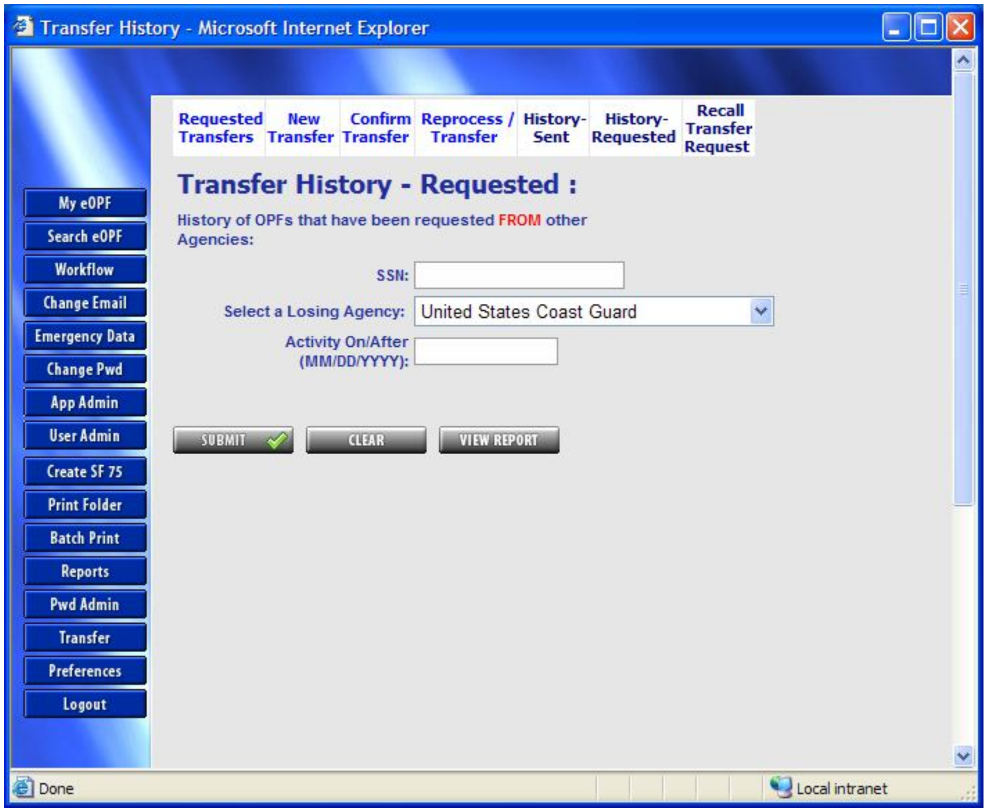
The *Requested Transfers* list appears which is the first tab on the Transfer Administration page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. Select the *History Requested* tab on the Transfer Administration page.

A web page is displayed allowing you to search for Transfer History - Requested.



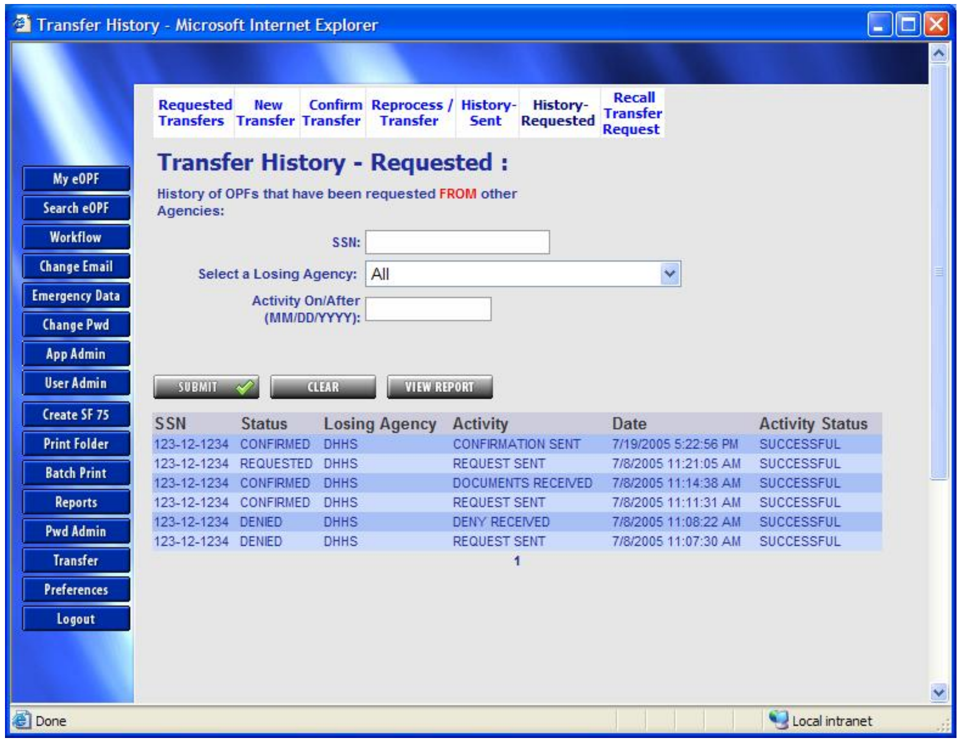
Note:

The Losing Agency list is limit to those agencies participating in eOPF.

3. **Enter your search criteria and select the** 

Submit button.

   A web page is displayed showing the results of your search. The activity column indicates what actions have occurred for your request. Actions include: Request Sent, Recall Sent, Documents Received, and Confirmation Sent. Results are sorted by SSN and date.



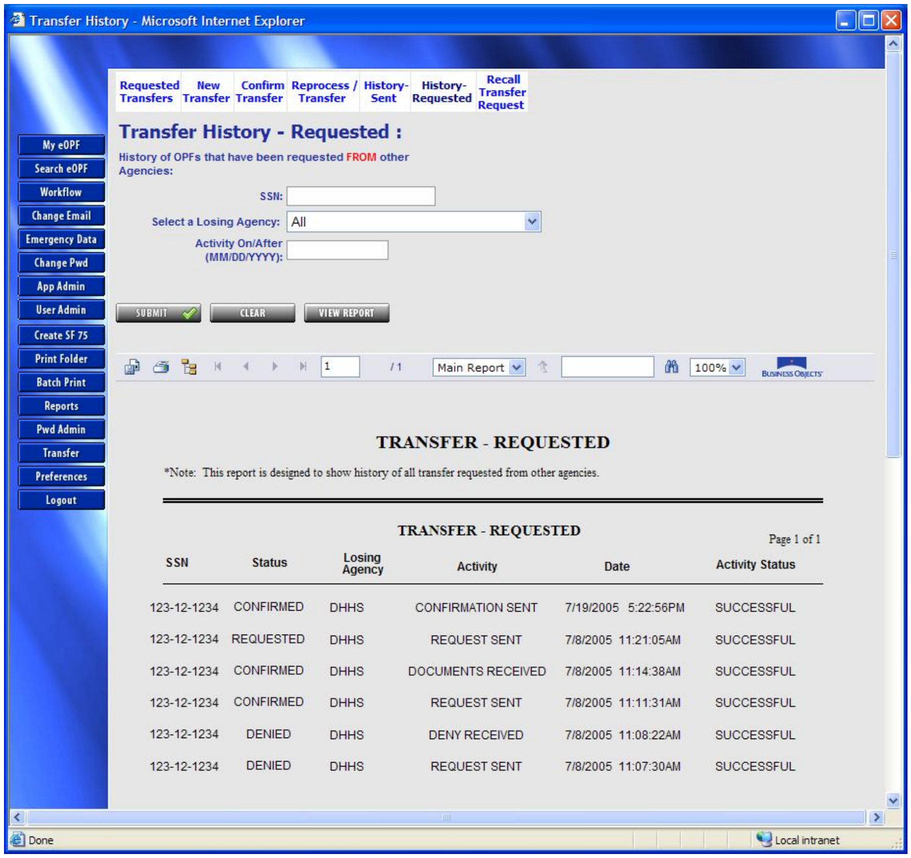
Note:

You may use this capability to see where you are in the transfer process for a specific OPF.

4. (Optional) Select the 

View Report **button.**

The data is converted to a Crystal Report layout that can be printed or exported. An example can be seen in the following graphic.



Reviewing Transfer History - Sent

There are two types of history maintained by eOPF regarding transfer. You have history for Requested Transfers and history for Sent Transfers. A sent transfer is the result of you responding to a request for an OPF from another agency. To access Transfer History – Sent you must access the eOPF Transfer Administration module. The eOPF Transfer Administration module is available when selecting the 

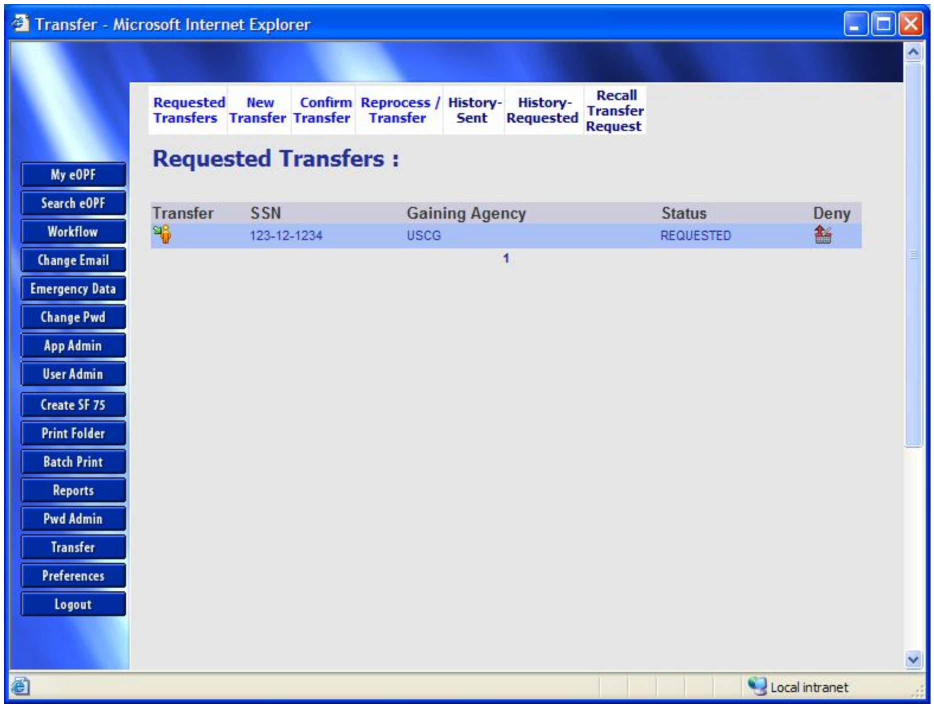
Transfer button on the eOPF main button menu.

To review Transfer History - Sent:

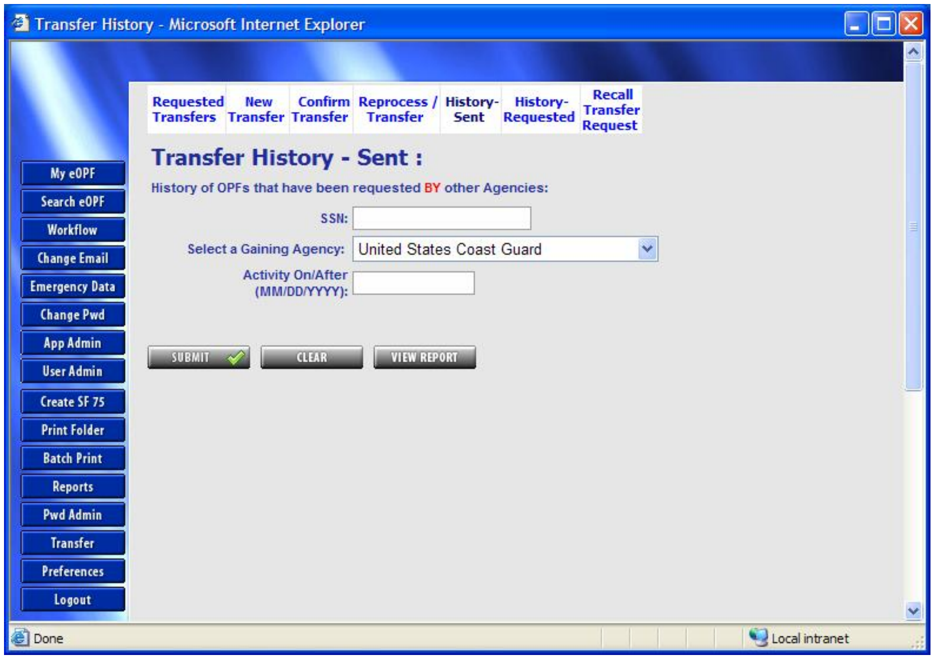
1. **From the eOPF main menu buttons, click the** 

Transfer button.
   The *Requested Transfers* list appears which is the first tab on the Transfer Administration page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. **Select the *History Sent* tab on the Transfer Administration page.**
   A web page is displayed allowing you to search for Transfer History - Sent.



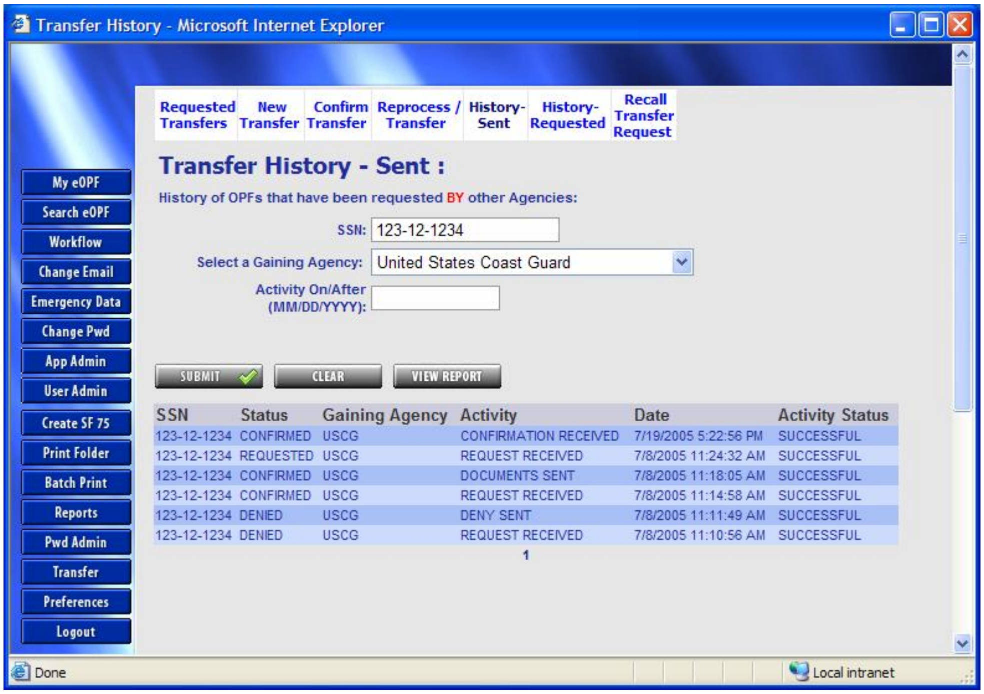
Note:

The Gaining Agency list is limit to those agencies participating in eOPF.

3. Enter your search criteria and select the 

Submit **button.**

A web page is displayed showing the results of your search. The activity column indicates what actions have occurred for your request. Actions include: Request Received, Recall Received, Documents Sent, and Confirmation Received. Results are sorted by SSN and date. The Activity Status indicates if the action was successful.

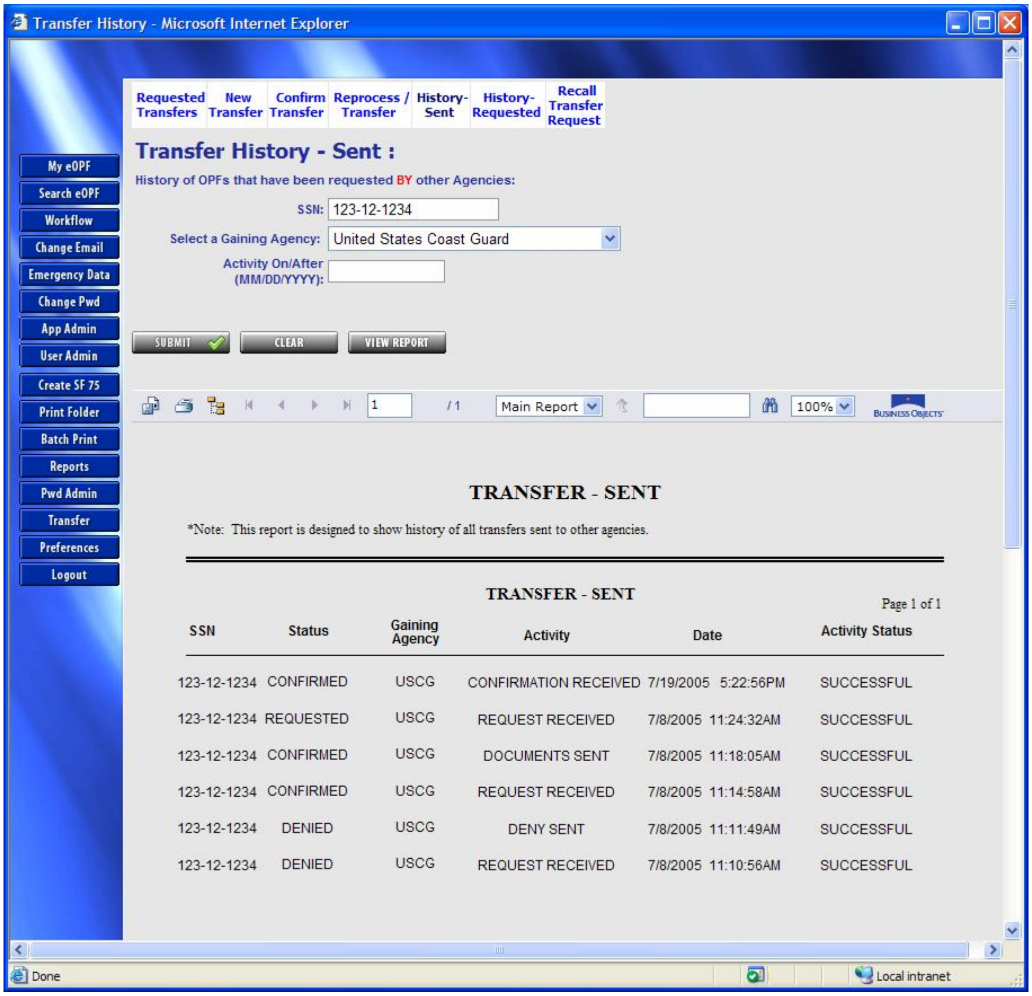


Note:

You may use this capability to see where you are in the transfer process for a specific OPF.

4. **(Optional) Select the** 

View Report **button.**
The data is converted to a Crystal Report layout that can be printed or exported. An example can be seen in the following graphic.



Reprocessing a Transferred OPF

In the event that a new document is received or missed during transfer of a OPF, the losing agency may submit additional documents to the gaining agency. To access Reprocess Transfer action, you must access the eOPF Transfer Administration module. The eOPF Transfer Administration module is available when selecting the 

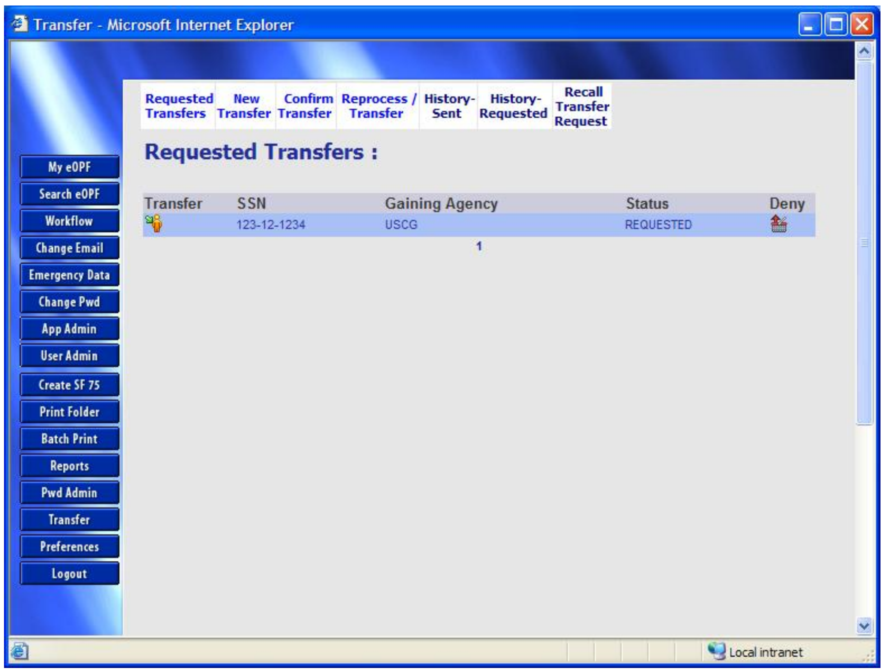
Transfer button on the eOPF main button menu.

To reprocess a transferred OPF:

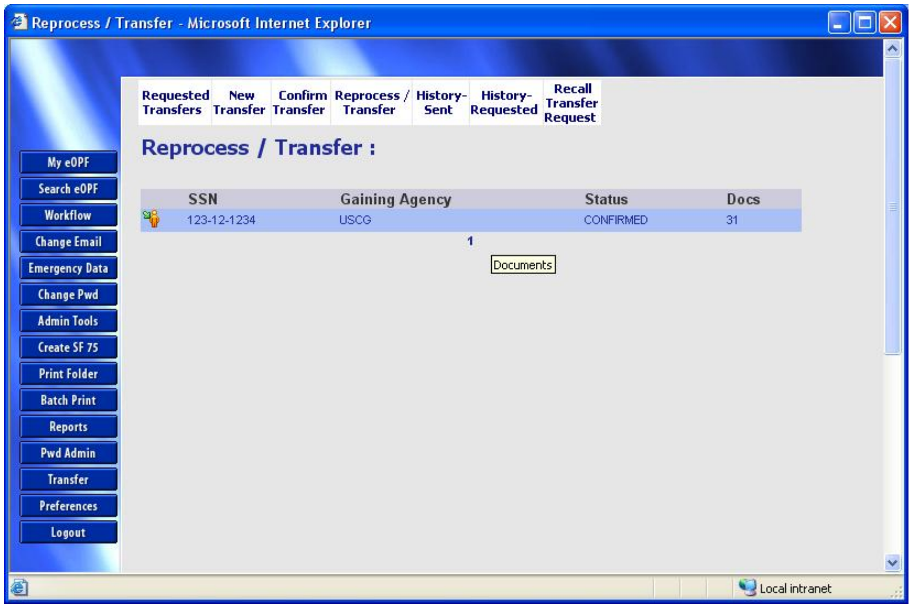
1. **From the eOPF main menu buttons, click the** 

Transfer button.
The *Requested Transfers* list appears which is the first tab on the Transfer Administration page. This lists transfer requests made by other agencies to your agency.

The following figure displays the ***Transfer Administration*** page with the Requested Transfers tab active.



2. **Select the _Reprocess/Transfer_ tab on the Transfer Administration page.**
A web page is displayed listing previously transferred eOPFs.



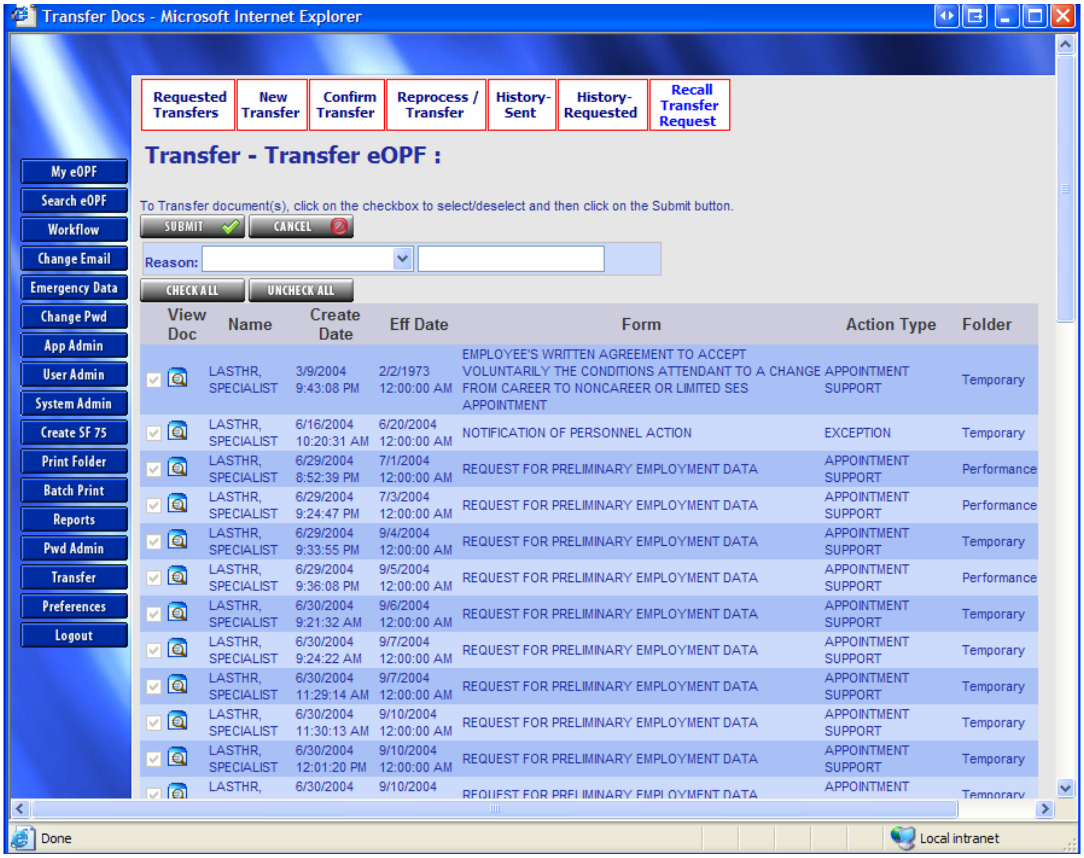
Note:

Currently, the list is not searchable and contains all folders that have been transferred.

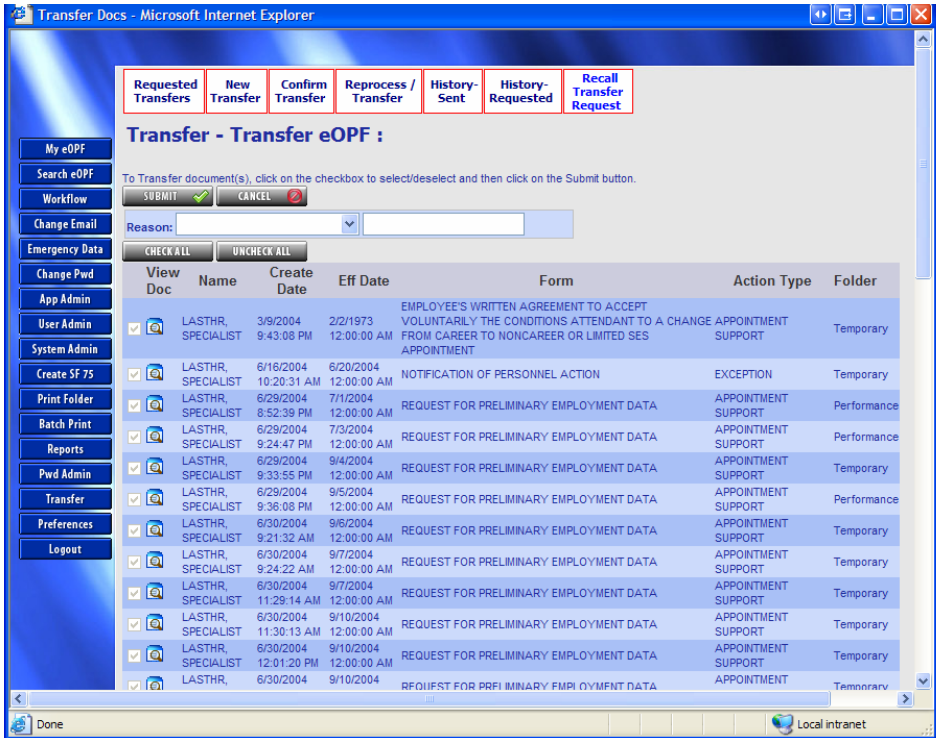
---

3. **Click the  Transfer Icon to initiate a transfer to the requesting (Gaining) agency.**

You are presented with the contents of the requested OPF.



4. **Check any documents that must be transferred. Some may now be pre-selected that were not when you did the initial transfer. This would occur if the administrator identified new forms to be included in the transfer package.**
   Required documents are pre-selected. You can not override pre-selected documents. You may add additional documents that are not pre-selected to be included in the transfer package by clicking on the check boxes provided.



Note:

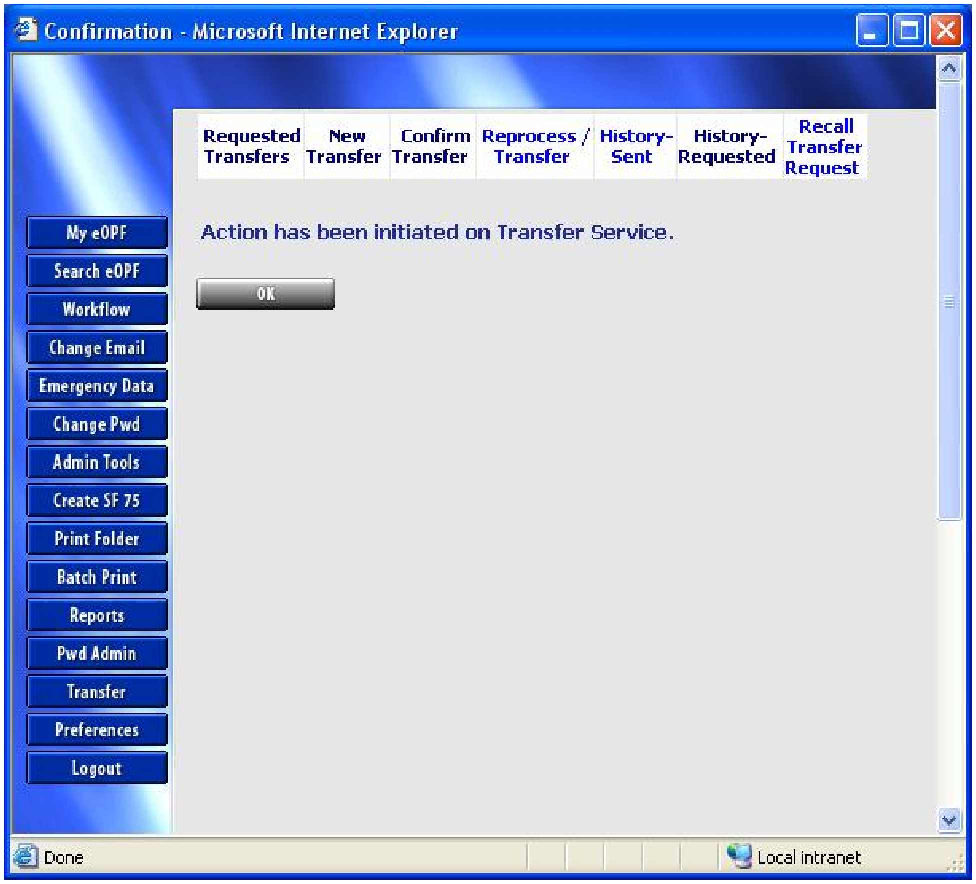
The documents that are pre-selected are identified by the Transfer attribute placed on the document using the eOPF Administration Tools → ***Forms Administration*** page.

5. Click the 

***Submit* button.**

The eOPF Transfer Service will package the selected documents and send to the requesting agency. This process will take a couple of minutes depending on the number and size of the documents.

The following confirmation message is displayed.



6. Click the 

***Ok* button.**

The Transfer has been initiated and the selected OPF document(s) are being transferred to the gaining (requesting) agency. You may open the History Sent tab to see that your sending action has been captured.

Glossary

Add Clip
An  icon used to add documents to a paper clip that was previously assigned to a folder

Administrator
A user that has special access to setup, modify, and delete parameters within the eOPF system

Annotate Doc
An  icon used to access the annotation function within eOPF

Annotation
Notes added to an employee's eOPF document accessible through an icon

Archiving
Process that flags documents and moves the images to a designated location on the server.

Batch Printing
Printing a group of multiple eOPF folders

Career Brief
A report (accessible via  icon**)** that is a summary of an employee's career

Clip Folder
An employee folder with assigned paper clips accessible via  icon

Contact Information
Data (accessible via  icon) is voluntarily supplied by employees for use by management during an emergency

Delete Doc
An  icon used to delete documents from a folder

Groups	A combination of functional processes for which a user is granted access
Folder	A system of indexing records from DCPDS and legacy databases**.**
Form Package	A collection of documents that the HR staff member can utilize for a specific business process, i.e., retirement processing, reduction-in-force, etc.
Form Type	A functionality that associates a form classification to a particular HR action.
Modify Doc	A function accessible via icon  that allows the user to add or delete pages to a document
Modify Doc Index	A function accessible via icon  used to alter the indexing of a document within a folder.
Org Code	Organizational Code
Page Instruction	Text that will appear on the Instruction page for a document**.**
Paper Clip	Logical grouping of documents within a folder accessible via icon
Password	A complex sequence of characters required for access to the eOPF.
Password Letter	Notification from the Component to the employee providing the password for the eOPF

Position Description	A written description of the duties, knowledge, skills and abilities for a position in the Federal Service accessible via icon View PDQ
PDQ	An View PDQ icon for accessing Position Descriptions
Query Package	An administrative tool used to search common groups of documents.
Security Access	**A** level of accessibility to documents and functions within eOPF.
Super User	A user that has access to view OPFs for an additional selection of employees for whom he/she would not have access base on their personal organizational information (PO ID, Org Code, Activity).
Supervisor	A user that has access to not only his or her own eOPF, but also is provided with access to view and print those employees documents for whom he or she supervises.
TWAIN	De facto interface standard for scanners
View Doc	A View icon used to view the documents within a folder
Work Basket	**A**reas that hold workitems.
Workflow	Workflows are predefined paths (referred to as process maps)
Workitem	Units of work within a workflow

Acronyms

AVI	Annotate, View, and Import
AVIS	Annotate, View, Import, and Scan
CPMS	Civilian Personnel Management Service
DCPDS	Defense Civilian Personnel Data System
DoD	Department of Defense
EBIS	Employee Benefits Information System
eOPF	Electronic Official Personnel Folder
EPF	Employee Performance File
ISIS	Image and Scanner Interface Specifications
IVRS	Interactive Voice Response System
NOAC	Nature of Action Code
OPF	Official Personnel Folder
OPM	Office of Personnel Management
PDF	Portable Document Format
RIF	Reduction-in-Force
PO ID	Servicing Office Identification
SSN	Social Security Number

Index

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W