U. S. Office Of Personnel Management The e-Government Program Office



ELECTRONIC OFFICIAL PERSONNEL FOLDER

eOPF Human Resources Specialist Training Manual

eOPF Version 4.0



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The United States Office Of Personnel Management eOPF[®] Human Resources Specialist Training Manual for eOPF Version 4.0.

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Chapter 1: Introduction To OPM eOPF

The Northrop Grumman Corporation is helping The United States Office of Personnel Management (OPM) change the way Federal Government agencies maintain and access official personnel folders (OPF). Personnel offices across the nation are changing from a paper-based personnel records system to an electronic official personnel folder (eOPF) management system. All current paper OPF documents are uploaded into the Web-enabled Electronic Official Personnel Folder (eOPF) solution. In the future, all personnel actions will be performed electronically. That includes how you and your co-workers access your OPF and the OPFs of those whom you support. With personnel records being electronic files instead of paper, eOPFs can be viewed 24 hours a day, 7 days a week.

What is eOPF, and what does it mean to you? The eOPF solution is designed to electronically store, manage, and distribute OPF documents. eOPF stores all OPF documents as Portable Document Format (PDF) files, complete with data describing the folder and its contents.

Employees are able to view their own OPFs through this eOPF solution. eOPF allows supervisors to view the eOPFs of all of their subordinates. eOPF has multiple levels of access security to ensure that neither employees nor supervisors can change an eOPF at any time, in any manner. All access for regular users and supervisors is on a 'View Only' basis. eOPF security features also ensure the integrity of the eOPF solution. In addition, eOPF security logs and tracks every action performed within eOPF. That includes notification to employees every time a new document is added to their eOPFs.

This training session is designed to introduce you to the eOPF solution, and to familiarize you with what you may or may not do within eOPF based upon your security access level. In this course we are only concerned with Human Resources (HR) Specialists accessing their own eOPFs as



well as the eOPFs of personnel they are responsible for maintaining.

This HR Specialist Training Manual assumes that you have working knowledge of Microsoft Windows and the Internet. If you do not have access to the Internet or eOPF, please contact an eOPF administrator to assist you with the setup.

IMPORTANT!

This HR Specialist Training Manual includes screens from the eOPF solution representative of what you may see; however, your system may appear 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.



Chapter 2: eOPF Browser And Viewer Requirements

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

2.1 Browsers

Commercially available Web browsers can be used to access the eOPF solution. For best results, OPM recommends using the latest version of Microsoft Internet Explorer.

2.2 The eOPF Viewer

The eOPF solution stores documents as Portable Document Format (PDF) files, which are viewed and printed using Adobe Reader. If you do not have Adobe Reader installed on your computer, you may download the free viewer off the Internet.

Note:

The Adobe Reader "options" should be set "not" to view inside the browser.





Chapter 3: Getting Started With eOPF

Before using the OPM eOPF solution, you must login. Logging in requires a valid eOPF ID and password. Your eOPF account may be set up when your agency initially deploys eOPF, or when you first become an employee. If you do not have an eOPF ID and password, please contact your eOPF administrator to obtain one.

If you forget your password, a "Forgot Password" link is available on the eOPF Logon page. Enter your eOPF ID and click the *Forgot your Password?* link on the eOPF Logon page. eOPF generates a letter assigning you a new password. A new password is sent to you by either U.S. mail, or email. Your organization will advise you what to expect.

Note:

Both Single Sign On and eAuthenticate initiatives are being implemented for eOPF. If activated for your agency, you will no longer directly log into the eOPF application. In that case, you will connect to eOPF using an eAuthenticate type portal. When Single Sign On is used, the eOPF ID and password functionality will be disabled.

Note:

As an eOPF administrator, you can set the number of logon failures that personnel may be allowed before the user account is disabled. Typically, after three (3) consecutive failed attempts to logon to eOPF, the user account is "locked out" as a security precaution. eOPF administrators must reset the user account after the user exceeds the maximum number of failed logon attempts.



To ensure the data integrity and security of the OPM eOPF solution, you must remember to safeguard your eOPF ID and password. Some basic guidelines for maintaining your password security are as follows:

- **4** Do not give your password to anyone.
- Do not write your password down.
- Do not let anyone logon with your eOPF ID or password, because eOPF will log and track all actions performed during your eOPF session to your eOPF ID and password.

3.1 Logging Into eOPF

To log into eOPF:

 Launch the eOPF application by double-clicking the OPM eOPF shortcut on your desktop. The OPM Government Usage Agreement page appears with warnings and conditions for using the OPM site.

New User About the Agency What's New Quick Index Operating Status	Search
Office of Personnel Manageme The Federal Government's Human Resources Agency	nt
Strategic Management of Human Capital 🚺 Employment and Benefits	Career Opportunities
You are here: <u>Home</u> > <u>egov</u> > EHRI eOPF	Working for America
This is an official U.S. Government System for authorized use only. Unauthorized use of information on this system could result in criminal prosecution. Signing into this applicat and accepted the <u>Full Terms and Conditions of Use</u> and you consent to secure testing a	this system or the tion indicates you have read and monitoring.
Signing into this application indicates you have read and accepted the <u>Privacy Policy</u> , a testing and monitoring.	nd you consent to secure
Signing into this application indicates you have read and accepted the <u>Rules of Behavic</u> testing and monitoring.	or, and you consent to secure
To access your account information, your computer's assigned Internet Protocol (IP) ac your Internet Service Provider (ISP), must remain the same from the time you enter you on the Login Page until you leave the Account Access section.	ldress, which is controlled by ur user name and password
Please be aware, you must have <u>Microsoft Internet Explorer</u> version 6.0 or higher and , 6.01 or higher to run this application software. JavaScript must be enabled to use the e	Adobe Acrobat Reader version eOPF application.
Agency Specific Message	
ACCEPT	
Office of Personnel Management	Site Index A-Z 💌
1900 E Street NW, Washington, DC 20415-1000 (202) 606-1800 TTY (202) 606-2532 Contact Us Forms FAQ's Products & Services	



Note:

The OPM URL address for eOPF will be announced at the time of deployment, or you may obtain the address from OPM eOPF administrators.

2. Read the **User Agreement**, and click the **Accept button**.

The eOPF Logon page appears.



- 3. In the eOPF ID field, enter your eOPF ID.
- 4. In the **Password** field, enter your password.
- Optional: If you are a new user, click the New User-Request Password... link. The New User – Request Password page appears allowing you to request your new password.
- Click the Submit ______ button.
 If you have logged into this eOPF version previously, the eOPF Welcome page appears.



Note:

The first time that you logon to eOPF, the *Change your Password* page appears displaying a message that your password has expired. Change your password in accordance with your password security requirements.

Note:

If you are logging into eOPF v4.0 for the first time, you will be forwarded to the Select Security Questions page. Here you will be required to answer security questions that only you would know the correct answers.

The Select Security Questions page appears below.

nd answer security questions - Microsoft Internet Exp	plorer
	A DECK DECK DECK
Select and answer your Purpose: The following security questions will be u password or eOPD ID. You can modify the ans	security questions used to verify your identity if you forget your wers using 'My Profile' after you login.
Email Address:	
Check here, if you are using assistive technology? (ex:	: Screen Reader)
Personal Questions	
What are the last 4 digits of your SSN?(Ex: 1234)	×
What are the last 4 digits of your SSN?(Ex: 1234)	~
What are the last 4 digits of your SSN?(Ex: 1234)	~
What are the last 4 digits of your SSN?(Ex 1234) Helpdesk Verification Questions Please select and answer all questions below.	<u> </u>
What are the last 4 digits of your SSN?(Ex 1234) Helpdesk Verification Questions Please select and answer all questions below. What is you mother's birth date?(Ex 09/14/1950)	✓
What are the last 4 digits of your SSN?(Ex: 1234) Helpdesk Verification Questions Please select and answer all questions below. What is you mother's birth date?(Ex: 09/14/1950) What is you mother's birth date?(Ex: 09/14/1950)	×
What are the last 4 digits of your SSN?(Ex: 1234) Helpdesk Verification Questions Please select and answer all questions below. What is you mother's birth date?(Ex: 09/14/1950) What is you mother's birth date?(Ex: 09/14/1950) What is you mother's birth date?(Ex: 09/14/1950)	 ✓ ✓ ✓ ✓
What are the last 4 digits of your SSN?(Ex 1234) Helpdesk Verification Questions Please select and answer all questions below. What is you mother's birth date?(Ex 09/14/1950) What is you mother's birth date?(Ex 09/14/1950) What is you mother's birth date?(Ex 09/14/1950) Note: Answers to the above questions are required to out of the appli	
What are the last 4 digits of your SSN?(Ex: 1234) Helpdesk Verification Questions Please select and answer all questions below. What is you mother's birth date?(Ex: 09/14/1950) Note: Answers to the above questions are required to out of the application of the ap	



The **eOPF Welcome** page is shown below:



Note:

Your Main Menu buttons may appear slightly different from the example above. The main menu buttons are dynamically activated by your role within eOPF and your security access permissions.

3.2 Changing Your Preferences

The OPM eOPF solution allows you to set preferences within the application. There are two types of preferences: General and Workflow. Workflow is only accessible if you have a workflow enabled account.

From the General Preferences tab, you can set your default forms list on the Search page and which columns to display in the result set.



tab of the My

To change your general preferences:

1. From the eOPF main menu, click the **My Profile My Profile** button.

The **General Preferences Profile** page displays by default.

onne -		nces - microsoft in	ternet Expt				
	General Preferences	Workflow Preferences	Change Email	Emergency Data	Change Password	Change Security Questions	He
	Preference	s - General P	referen	ces :		n	
		Number of Rows pe	er Page (Displ	ay): 10			
		Select Results	Display (Fold	er): Display S Display L Display F	SSN column with Fo .ast Name column v first Name column v	older results with Folder results with Folder results	
	:	Select Default Search	Option (Forn	ns): OCommor	Forms OAll For	ms OAgency Forms	
		play (Docume	Display F Display F Display F Display 1 Display 1 Display 1 Display 2 Display 2 Display 2 Display 5 Display 6 Display 6	Display Form Number column with Document results Display Form Description column with Document results Display Type Description column with Document results Display NOA Code 1 column with Document results Display NOA Code 2 column with Document results Display Side by Side column with Document results Display Create Date column with Document results Display Folder Side column with Document results Display Exception Comment column with Document results			
Ī		Are you using assis	stive technolo : Screen Read	gy? ler) No O	Yes		

- 2. Type your desired number of rows per page in the **Number of Rows per Page (Display)** field.
- 3. Select which fields you would like to see for each section.
- 4. Select if you are using Assistive Technology.
- 5. Click the Apply button. The General Preferences page reappears displaying the following message: "Settings updated. Some of these settings will take effect next time you log into eOPF."



3.3 Your Email Address

The OPM eOPF solution notifies you by email every time a new document is added to your eOPF. Your agency will provide guidance at to whether or not you can change your email address.

To change your email address:

1. From the eOPF main menu, click the **My Profile** button.

The **General Preferences** tab of the **My Profile** page displays by default.

Email Address : Instructions: The eOPF system can automatically inform you every time a document is added to your eOPF. To a notification, please insert the email address you would like this notice sent to into the email address block below may change this address whenever you would like. If you do not enter an address you will not receive any email notification. Your Email Address: HPS:necialist@test.org	eneral ferences	Workflow Preferences	Change Email	Emergency Data	Change Password	Change Security Questions	Help	
Instructions: The eOPF system can automatically inform you every time a document is added to your eOPF. To a notification, please insert the email address you would like this notice sent to into the email address block below may change this address whenever you would like. If you do not enter an address you will not receive any email notification.	il Addres	ss :						
a notification, please insert the email address you would like this notice sent to into the email address block below may change this address whenever you would like. If you do not enter an address you will not receive any email notification.	ictions: The	eOPF system ca	n automatica	llv inform you ev	erv time a docu	ment is added to your e	OPF. To rece	
Vour Email Address: HPSpecialist@test.org	ication, please	insert the emai	l address you	would like this r	notice sent to in	to the email address bloc	ck below. You	
Vour Fmail Address	may change this address whenever you would like. If you do not enter an address you will not receive any email notification.							
Your Email Address: HBSnecialist@test org	nange this addi ation.	ress whenever y	ou would like	 If you do not i 	enter an addres	s you will not receive an	y email	
Total Childless. Intopecialistigress.org	ation.	ress whenever y	ou would like	a. If you do not	enter an addres	s you will not receive an	y email	
	ation. ur Email Addı	ress whenever y	;ialist@test.o	e. If you do not i	enter an addres	s you will not receive an	y email	
UPDATE 2 CARCEL 2	ation. ur Email Addi	ress: HRSpec	ialist@test.o	e. If you do not i	enter an addres	s you will not receive an	y email	

2. Click the **Change Email** tab at the top of the page. The **Change Email** page appears.

3. Type your email address into the field provided.

Click the Update button.
 The Change Email page reappears displaying the following message: "Email Address updated successfully."



3.4 Viewing And Updating Emergency Data

The OPM eOPF solution 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. From the eOPF main menu, click the **My Profile** button.

The **General Preferences** tab of the **My Profile** page displays by default.

2. Click the **Emergency Data** tab at the top of the page.

The **Emergency Data** page appears.

Disclosure work. This info used for any off to change this d	Statemen mation will be a er purpose. A l ata.	It: This informati wallable to your sug og is kept showing	on may be used to pervisor and Hum any time this info	o notify the individuals of an Resource personnel I rmation is viewed and o	f your choice should for emergency use o r changed. Only the	you be taken ill o nly. This inform individual emplo	r injured du ation is not yee is autho
User Info	:						
Last Name :	HR		First Name :	SPECIALIST	Initials :	E	
	55N :	454-54-5454		Last Updated:	7/9/2007		
1	Iome Address:			Work Address:		_	
	ddress (cont):			Bidg Name/Location:			
	City:			City			
	State:			State:			
Zi	/Postal Code:	20151		Zip/Postal Code:			
	Country:	UNITED STATE	S	Country:	UNITED STATES		
Notify Firs	at:			Notify Second	:		
Lost Name :				Last Name	-		
First Name :				First Name			
Relationship :				Relationship	-		
Street 1 :				Street 1			
Street 2 :				Street 2	-		
City :				City			
State :				State			
Zip :				Zip			
Country :	UNITED STATES		~	Country	UNITED STATES		
EMail :				EMail			
Home				Home Phone			
Work Phone :				Work Phone			
				-			

3. Edit the desired fields, and then click the **Apply** button.

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



3.5 Managing Your eOPF Password

eOPF gives you the ability to change your password anytime. For example, your password may have been compromised or you may need to synchronize your eOPF password with your network password.

Note:

The following topic is only relevant if you are using the traditional eOPF login page requiring an eOPF ID and password. As agencies implement Single Sign On and eAuthenticate, the need to maintain a specific eOPF ID and password will cease to exist.

When you change your password, you must ensure that your new password adheres to all requirements that your eOPF administrator has defined. Your administrator may require that you use a combination of the following:

- Minimum number of 8 characters.
- **4** At least one uppercase or lowercase letter.
- At least one number.
- **4** At least one special character such as:
 - (!, @, #, \$, %,^, &,(), +, { }, [], ;, >, etc.)
- Password expiration period.

To change your password:

1. From the eOPF main menu, click the **My Profile** button.

The **General Preferences** tab of the **My Profile** page displays by default.

 Click the Change Password tab at the top of the page. The Change Password page appears.

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

Note: Password must one special character	contain at least and must be at	one upper-ca least 8 charae	ase letter, one cters in lengtl	e lower-case lei I.	ter, one number and
Old Password:]		
New Password:]		
Verify Password:					
UPDATE 🥱	CANCEL 🙆				

- 4. In the **New Password** field, enter your new password.
- 5. In the **Verify Password** field, enter your new password again.
- 6. Click the Update button to update your eOPF password.
 Click the Cancel button to cancel the password change. The eOPF Welcome page appears with the number of days when the password expires.

3.6 Change Security Questions

eOPF allows you to manually change your security questions at any time.

To change your security questions:

- From the eOPF main menu, click the My Profile My Profile
 button.
 The General Preferences tab of the My Profile page displays by default.
- Click the Change Security Questions
 Click the Change Security Questions
 tab at the top of the page.
 The Change Security Questions page appears.



🕘 My Profile	file - Change Security Questions - Microsoft Internet Explorer								
	General Preferences	Workflow Preferences	Change Email	Emergency Data	Change Password	Change Que	Security stions	Help	Т
My eOPF	Change Sec	curity Quest	ions :						
Search eOPF Workflow	Allow user to change Security Questions.								
My Profile									
App Admin	Personal Question								
Create SF 75	What is your Birth State?(Ex: VA)								
Print Folder	What is the year you graduated from high school?(Ex: 1987)								
Batch Print Reports	What is the color of your mother's eyes?(Max 35 chars)								
Pwd Admin	Helpdesk Questions								
Transfer	What is the name of your high school?(Max 35 chars)							ERNON	
Logout	What is your father's middle name?(Max 35 chars)								
	What is your favor	ite time of the year?(Max 35 chars)		~	WINTER		
	UPDATE 🥞	CANCEL 💋							

- 3. Select the security question(s) you would like to change by clicking the appropriate drop-down arrow. Once you select your new security question(s), type the correct answer in the box to the right of the question.
- 4. Click the Update UPDATE button to update your security questions. The Change Security Questions page reappears displaying the message "Security questions updated successfully."

3.7 Accessing Online Help

The OPM eOPF solution allows you to access on-line help for just in time tutorial or refresher training.

To access online help:

1. Click the **Help** link in the upper right corner of an eOPF page.





2. Search to locate information about eOPF functionality and procedures

3.8 Accessing Frequently Asked Questions (FAQ)

The OPM eOPF solution provides answers to frequently asked questions on its FAQ page.

To access the FAQ page:

1. Click on the **FAQ** link in the upper right corner of an eOPF page.





2. Browse the FAQ page to learn answers to the questions most people are asking.

You could get answers to questions similar to the following:

- What is the OPM eOPF solution?
- What eOPF questions do people ask most often?
- What is new in eOPF?
- What kinds of technical issues may we encounter?
- ✤ Who do I call when I need help with eOPF?



3.9 Using The Home Link

The OPM eOPF solution allows you to return to the **eOPF Welcome** page by clicking the **Home** link in the upper right corner of any eOPF page.





Chapter 4: Viewing eOPF Documents

eOPF organizes and manages personnel documents within an electronic folder. All Federal government employees have an eOPF with all of their personnel documents organized in the same manner as the traditional OPF.

4.1 Viewing Your eOPF Documents

To view eOPF documents:

- 1. Logon to the OPM eOPF solution.
- 2. Click either the **My eOPF** or the **Search eOPF** button to access your eOPF.
 - My eOPF lists your documents from the most recent effective date.
 - **Search eOPF** allows you to view:
 - Particular documents.
 - ✤ Your entire eOPF.



My e0PF	My eOPF:	My eOPF: STEVE CRAWFORD									
Search eOPF	Appotation	Annotation: View documents with annotations									
Workflow											
My Profile	SHOW ALL DOCS CANCEL										
App Admin											
Create SF 75	Action	SSN	Latest Ef	f. Date	POID	Ora Code	Activity Code				
Print Folder											
Batch Print	D 000-00-0004		01/11/20	01/11/2004		01D	A				
Reports	Folder										
Pwd Admin	102 document(s) returned.										
Transfer						Previ	- J + J NEAL				
Logout	Action	Effective Date	Form Number	Туре		NOA Cod 1	e				
	0 -	01/11/2004	SE 50	PAY ADJ		894					
	4	11/05/2003	3 SF 50 INDIVIDUAL CA		ASH AWARD	Doci	ument				
1.0	4	12/03/2002	SF 50	INDIVIDUAL C	ASH AWARD	Lis	sting				
	4	10/17/2002	SF 50	GROUP CASH	AWARD	841					
	4	09/22/2002	SF 50	WITHIN-GRAD	E INC	893					
		02/04/2002	SF 50-B	INDIVIDUAL C	ASH AWARD	840					

3. Click the **Action** ⁽⁴⁾ icon next to the document that you want to view.

Your security options for the selected document appear.

10	102 document(s) returned.							
					Prev 1 2			
	Action	Effective Date	Form Number	Туре	NOA Code 1			
	4	01/11/2004	SF 50	PAY ADJ	894			
	4	11/05/2003	SF 50	INDIVIDUAL CASH AWARD	840			
	4	12/03/2002	SF 50	INDIVIDUAL CAS	40			
	9	View -	F 50	GROUP CASH AWARD	841			
	- 🛃	Add to Clip						
	123		F 50	WITHIN-GRADE INC	893			
	• 4	02/04/2002	SF 50-B	INDIVIDUAL CASH AWARD	840			
	4	01/18/2002	SF 50-B	PAY ADJ	894			
	4	01/14/2001	SF 50-B	PAY ADJ	894			
	4	03/22/2000	SF 50-B	PERFORMANCE AWARD	885			
		01/02/2000	SF 50-B	PAY ADJ	894			

4. Select the **View Option**.

The document you want to view launches Adobe Reader allowing you to view the document.



5. Click the **Open** button when the **File Download** box displays.

The Adobe Acrobat Reader is opened and the selected document is displayed.

File Dow	rnload 🛛 🔀
Do you	ı want to open or save this file?
PDF	Name: ViewPDF.pdf Type: Adobe Acrobat Document From: eopf.nbc.gov Open Save Cancel
١	While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. <u>What's the risk?</u>

6. Click the **Close** button when finished viewing the document to return to eOPF.

Note:

Every time an eOPF document is viewed, that action is logged electronically.

4.2 Searching For eOPF Documents

eOPF search capabilities allow you to search and filter the search results according to your particular document requirements. You should try searching using different search criteria to learn how to locate desired documents in the manner that is most effective for you.

To search for eOPF documents:

1. Click the **Search eOPF** button. The **Search Folders** page opens.



My eOPF		Searc	h Folders : (HR Spe	ecialist)
Search eOPF Workflow	SEARCH 🔍 CLEA	R BACK 🤙		
My Profile App Admin	PO ID	Org Code	Activity Code	Employee ID
Create SF 75	SSN #	Date of Birth	NOA Code 1	NOA Code 2
Batch Print	Last Name	First Name	NAME SEARCH	Query Package
Reports Pwd Admin	1		- NAME JEANCH	
Transfer Logout	Form © Common Forms	O All Forms O Agency F	Forms	
	Туре			
	All			
100	Folder Sides 🗖 Sele	ect All		
	🔽 Temporary 🛛 🖓 Perr	nanent 🗖 Performance 🛛	Training Deleted D	Cancellation 🗖 Transferred
	Create Date	Start Eff. Date E	nd Eff. Date	
	SEARCH SEARCH	ers R BACK (=		

Note:

eOPF has "wildcard" characters to filter searches. The '%' character represents multiple characters; the '_' character represents a single character. For example:

- A% returns anything that starts with the letter A (e.g. AA, AAA, ABA, ABC, etc.).
- A_ returns anything that starts with the letter A, plus one additional character (e.g. AA, AB, AC, etc.).
- ✤ 1% returns 11, 123, 1234, 12345, etc.
- ✤ 1_ returns 11, 12, 13, 14, 15, etc.
- 2. Enter search criteria for particular eOPF document(s) and click the **Search SEARCH** button.
- Click the Folder Action icon of the folder to be viewed and select the Open icon option to display the documents in the chosen folder.



My eOPF	Rea	Reason: Annual Review 🔽 Annotation: View documents with annotations									
Search eOPF	5										
Workflow		SHOWALLOOG CARLEL									
My Profile	My Profile 18 folder(s) returned.										
App Admin		Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity		
Create SF 75									Code		
Print Folder	►		000-00-0003	BECK	FRED	02/08/2004	1001	010	A		
Batch Print			000-00-0011	BROWN	LEROY	04/25/2007	1001	02В	A		
Reports			000-00-0010	CHEEKS	MARY	01/12/2003	1001	02A	A		
Pwd Admin	-	6	000-00-0004	CRAWFORD	STEVE	01/11/2004	1001	01D	A		
Transfer											
Logout			000-00-0013	HANS-SMITH	CINDY	01/15/2004	1001	02D	A		

4. Click the **Action 4** icon next to the document that you would like to view and select the appropriate action.

My e0PF	Rea	son: Ar	nnual Review	*		Anno	otation:	View docur	nents with anno	tations	
Search eOPF	SI	IOW ALL D	DCS CANCEL	0							
Workflow My Profile											
my Profile	18 folder(s) returned.										
App Admin Create SF 75		Action	SSN	Last Name	First Name	Latest Et	f. Date	PO ID	Org Code	Activity Code	
Print Folder	►		000-00-0003	BECK	FRED	02/08/20	04	1001	010	A	
Batch Print			000-00-0011	BROWN	LEROY	04/25/20	07	1001	02B	A	
Reports Pwd Admin			000-00-0010	CHEEKS	MARY	01/12/20	03	1001	02A	A	
Transfer			000-00-0004	CRAWFORD	STEVE	01/11/20	04	1001	01D	A	
Logout			000-00-0013	HANS-SMITH	CINDY	01/15/20	04	1001	02D	A	
	27 C	ommon	document(s) retu	rned for: BECK, FRI	ED						
								Prev 1 2	Next		
		Action	Effective Date	Form Number	Туре	Type NO/		Code			
		4	02/08/2004	SF 50	REALIGNMENT		790				
		4	09/07/2003	SF 50	WITHIN-GRADE IN	4C	893				
		4	01/12/2003	SF 50	PAY ADJ	894					

4.3 Viewing eOPF Document Annotations

The OPM eOPF solution has an annotation feature that allows HR specialists to make annotations on documents, which are preserved as a layer that sits on top of the original document. Annotations can be viewed and/or printed with the original document. As an HR specialist, you may annotate any document that is not part of your own eOPF. In addition, if multiple HR specialists make annotations, they are each saved as a separate layer, which provides information about who added what information.



Annotations are added to each individual page of a document. As a result, you must navigate to each page to view the annotations on that particular page.

Note:

There are two classifications of an annotation: **Public** and **Private**. A Public annotation may be viewed by anyone who views the eOPF document. Private annotations can only be viewed and/or edited by the user who created the annotation or an authorized HR specialist.

To view eOPF document annotations:

Click either My eOPF My eOPF or the Search eOPF
 Search eOPF button to locate the annotated document.
 "View documents with annotations" is the default selection at the top of the display.

Search eOPF			Vien de come en							
Workflow										
My Profile	SHOW ALL DOCS CANCEL									
App Admin										
Create SF 75		Action CCN			Latest Ef	f Data	POID		n Codo	
Print Folder		SCHON	0014			i. Date	FOID	Org Code		
Batch Print			000-00-0004		01/11/2004		1001	01	D	
Reports										
Pwd Admin	102 do	ocumer	nt(s) returned.							
Transfer									Prev 1 2	
Logout	A	Action	Effective Date	Form Number		Туре			NOA Code 1	
		4	01/11/2004	SF 50)	PAY ADJ			894	
		()	11/05/2003	SF 50)	INDIVIDUAL C	ASH AWARD		840	

 Click the Action icon next to the document that you would like to view and select the View view option. Your eOPF document will open in Adobe Reader.



4.4 Creating And Adding Pages To Clip Folders

eOPF allows you to group pages and/or documents from the same folder together so that you may conduct a records audit or review. You determine whether or not you need individual pages or the entire document.

Creating a Clip Folder is a two-step process. The first step is to create a new clip folder. Then, you must select the pages you want to add to the clip folder.

To create a new clip folder:

- 1. Search for and open the desired folder.
- Click the Folder Action icon and select the Clip Folder Clip Folder option. The Clip Folders page appears.

						STEVE	CRAW	k
					Help	FAQ	I F	2
С	lip Fold	ers :						I
Allo	ow to add/modi	fy/delete clip folder. Click on the Detail buttor	n to view the clips in the folder.					I
		111 - 11 - 11 - 11 - 11 - 11 - 11 - 11						I
Se	lected clip is	deleted successfully.						I
	Owner	Description	Clip Date	Pages	Security			l
		SCD			Public 💌		Inser	į
	1		1			_		1
_								1
	BACK 🤤							

3. Enter a description for the clip folder in the **Description** field.

For maximum usability, use specific HR terms and/or actions in the **Description** field.

- 4. In the **Security** field, select either **Public** or **Private** based on your needs.
- 5. Click the Insert button.
- 6. Click the **Back** button to return to the **Search Results** page.



Note:

A clip folder is classified as *Public* or *Private*. Any user accessing the selected folder can view a public clip folder; however, ONLY the user that created the clip folder and authorized HR specialists can view a private clip folder.

To add individual pages to a clip folder:

1. Search within the folder for the documents you wish to clip together.

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

2. Click the **Action** A icon next to the document that you want added to the clip folder, and click the **Add to Clip** option.

The Add Clip to Clip Folder page appears.

Add Cli	in to Clin Foldor I			Help	FAQ
Select the cl	ip folder you want to add the cli	p to.			
			1		
	Owner	Description	Clip Date	Pages	Security
Select	CRAWFORD, STEVE	SCD	7/5/2007 2:19:38 PM	0	Public
			1		

3. Click the **Select** button to add pages to the clip folder.

The Add Page to Clip Folder page appears.



Add page to Clip Folder :	
Check the page you want to add to Clip Folder. Click on	the image to see larger one.
1 🗖 Add Page 1 to Clip	2 🗖 Add Page 2 to Clip

- 4. Click the checkbox under each page that you want added to the clip folder, and click the Submit submi
- 5. Click the **OK** button. The **Search Results** page reappears.

To add multiple documents to a clip folder:

- Search within the folder for the documents you wish to clip together.
 If this is not your own folder, you must select a reason for accessing a document from the **Reason** drop-down list.
- 2. Click the **Show All Docs** button. The **Show All Documents** page appears.



My eOPF Search eOPF Workflow My Profile App Admin	OPF To print a document(s), click on the checkbox to select/deselect and then click on the Print Single Sided or Print Double Sided button. NoPF PRINTSINGLESIDED Image: Print Double Sided DELETE SELECTED ADD TO CLIP CANCEL CHECKALL UNCHECKALL Image: Print Double Sided DELETE SELECTED ADD TO CLIP CANCEL CHECKALL UNCHECKALL										
User Admin	User Admin 81 Common document/s) returned in 1 folders										
System Admin		Prev 1 2 Next									
Create SF 75		0	001	Effective	Earne Nearthan	Ture	NOL ONE 1	0.4			
Print Folder		Спеск	55N	Date	Form Number	туре	NUA Code I	Side			
Batch Print			000-00-0018	04/04/2004	SF 50	REASSIGNMENT	721	Temporary			
Reports			000-00-0018	01/11/2004	SF 50	PAY ADJ	894	Temporary			
Pwd Admin			000-00-0018	02/23/2003	SF 50	REALIGNMENT	790	2 102 Code 1			
Logout			000-00-0018	02/09/2003	SF 50	PROMOTION	702	Temporary			
Logout	-		000-00-0018	02/09/2002	SE 52	PROMOTION	702	Permanent			
	-		000 00 0010	02/07/2003	01 02		702	remailent			
1 10 A			000-00-0018	12/01/2002	SF 50	REASSIGNMENT	721	Temporary			
			000-00-0018	05/05/2002	SF 50	WITHIN-GRADE INC	893	Temporary			

- 3. Click the checkbox for the documents you want to add to the clip folder.
- 4. Click the Add to Clip ADD TO CLIP button. The Add Clip to Clip Folder page appears.

				Help	STEVE CRA
Add Cli Select the cli	p to Clip Folder : p folder you want to add the clip	a to.			
			1		
	Owner	Description	Clip Date	Pages	Security
Select	CRAWFORD, STEVE	SCD	7/5/2007 2:19:38 PM	1	Public
BACK			1		

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

A confirmation page appears.

				STEVE CF	AWFORD
		Help	1	FAQ	Home
My e0PF	Pages have been successfully added to the Clip Folder.				
Search eOPF	OK				
My Profile					

Click the OK button.
 The Search Results page reappears.





Chapter 5: Printing eOPF Documents

Although the eOPF solution is a paperless Official Personnel Folder system, there may be times when you will need a hard copy of an eOPF document.

You may choose to print one or more of your eOPF documents. You may also choose to print documents with or without electronic annotations. Annotations are like notes that you may make on a paper document.

5.1 Printing An eOPF Document

To print an eOPF document:

- 1. Locate the eOPF document you want to print.
- 2. Click the **Action** (2) icon next to the document that you would like to print and select the **View** (3) View option. The document opens in the eOPF viewer.
- Click the **Print** button.
 The standard Windows **Print** dialog box appears.



Printer Name: Wis\Minolta Copier/Printer (Mailroom) Status: Ready Type: CopierBW Ver 1.11	Properties Print to file
Print Range ⊙ All	Preview 8.5
Current page Current page Pages from: 1 to: 6 Subset: All pages in range Page Handling	
Page Scaling: Fit to paper	
Print What: Document	Units: Inches Zoom: 95%

Note:

If you are printing a double-sided document, you must ensure that the printer is capable of duplex printing.

- 4. Ensure that your printer settings are correct.
- 5. Click the **OK** button to print your document.
- 6. Click the **Close** button to close the document viewer.

5.2 Printing Multiple eOPF Documents

eOPF permits you to print one or more documents from the **Show All Documents** page. A watermark of the OPM logo is added to the bottom, center margin of documents when printed from the **Show All Documents** page.



To print two or more eOPF documents:

- 1. Click the **Search eOPF** button. The **Search eOPF** page opens.
- 2. Enter search criteria and click the Search SEARCH SEARCH SEARCH

The **Search Results** page appears.

- 3. Click the **Show All Docs** button. The **Show All Documents** page appears with all documents that meet the search criteria.
- Click the checkbox for documents to print, or click the Check All CHECKALL button to select them all. All selected documents are merged into one document displayed in the viewer.

My eOPF Search eOPF Workflow	Top	To print a document(s), click on the checkbox to select/deselect and then click on the Print Single Sided or Print Double Sided button. PRINT SINGLE SIDED PRINT SINGLE SIDED PRINT SINGLE SIDED PRINT SINGLE SIDED CHECK ALL UNCHECK ALL UNCHECK ALL End of the second seco										
My Profile App Admin User Admin System Admin	All Profile pp Admin Set Admin ster Admin Ster Admin											
System Admin						Prev	1 2 Next					
Print Folder		Check	SSN	Effective Date	Form Number	Туре	NOA Code 1	Side				
Batch Print			000-00-0018	04/04/2004	SF 50	REASSIGNMENT	721	Temporary				
Pwd Admin			000-00-0018	01/11/2004	SF 50	PAY ADJ	894	Temporary				
Transfer			000-00-0018	02/23/2003	SF 50	REALIGNMENT	790 Row	2, NOA Code 1:				
Logout			000-00-0018	02/09/2003	SF 50	PROMOTION	702	Temporary				
			000-00-0018	02/09/2003	SF 52	PROMOTION	702	Permanent				
			000-00-0018	12/01/2002	SF 50	REASSIGNMENT	721	Temporary				
			000-00-0018	05/05/2002	SF 50	WITHIN-GRADE INC	893	Temporary				
			000-00-0018	01/13/2002	SF 50-B	PAY ADJ	894	Temporary				
			000-00-0018	09/09/2001	SF 50-B	REALIGNMENT	790	Temporary				
			000-00-0018	07/15/2001	SF 50-B	REALIGNMENT	790	Temporary				
			000-00-0018	05/06/2001	SF 50-B	CORRECTION	002	Temporary				
			000-00-0018	04/22/2001	SF 50-B	WITHIN-GRADE INC	893	Temporary				
			000-00-0018	01/14/2001	SF 50-B	PAY ADJ	894	Temporary				
			000-00-0018	04/23/2000	SF 50-B	WITHIN-GRADE INC	893	Temporary				
			000-00-0018	01/03/2000	SF 50-B	PAY ADJ	894	Temporary				
			000-00-0018	11/08/1999	SF 50-B	CHG IN DATA ELEMENT	800	Temporary				

5. Click the desired **Print** button.

The documents print single sided or double-sided according to the settings for the designated printer.





Chapter 6: Adding eOPF Documents

eOPF enables HR specialists and eOPF administrators to manually add new documents into the system. Authorized users may either import electronic files or scan paper documents into the database.

6.1 Adding Electronic Documents To The eOPF

eOPF allows users to import electronic documents into the eOPF. eOPF supports files that are scanned, images, Microsoft Word, and many other types of electronic files.

To import an eOPF document:

- 1. Search for the employee eOPF to which you need to add the new document.
- 2. Select a Reason for viewing the eOPF.
- 3. Click the **Folder Action** icon of the folder and select the **Add Doc** Add Doc option.
- Click the Open button.
 The Select Local File to import dialog box appears.
- Search for and select the desired file, and click the Open button. The selected file appears.
- Click the Save button.
 The Document Information dialog box appears.
 The First Name, Last Name, and SSN fields will be completed based upon the SSN of the selected folder.



- 7. Complete all known indexing information to describe the new document that you are adding to the OPF. Add as a minimum:
 - From the **Form** drop-down list.
 - From the **Type** drop-down list.
 - Select the Effective Date of the action.
 - Select the **Folder** side on which the document will reside.

Document Information	
✓ Include Obsolete Forms	
Form:	
SF 50 NOTIFI	CATION OF PERSONNEL ACTION
Туре:	
CANCELLATION	
NOA Code: 1	
NDA Code 2: 004	
NOA COUR 2. 1034	
Insert into Workflow:	
Flow: Default Process	
Effective Date:	Folder Side:
07/24/2005	SSN: 000-00-1111 Select
	Performance First Name: JOE
→ July 2005 →	Overseas
Sun Mon Tue Wed Thu Fri Sat 26 27 28 29 30 1 2	Deleted
3 4 5 6 7 8 9	Agency Specific Dont know the SSN2 Click "Find"
10 11 12 13 14 15 16	Find Find
24 25 26 27 28 29 30	
31 1 2 3 4 5 6	Save Cancel
C I oday: 7/25/2005	

- Verify your indexing information and click the Save button.
 A confirmation box appears.
- Double-check your information is accurate, and click the Yes button to save the indexing information. A confirmation box appears.
- 10. Click the **OK** button to confirm that the indexing information is correct.
- 11. Click the **Exit** button.



Click the "<u>Please click here to return to eOPF</u>" link.
 The Search Results page reappears.

6.2 Importing A New Page Into An Existing eOPF Document

Sometimes you may need to add a missing page from an electronic document.

To insert a new page from an electronic file:

- 1. Search for the employee eOPF to which you need to add the new document.
- 2. Select a **Reason** for viewing the eOPF.
- Click the Action
 icon next to the document that has to be modified and select the Modify
 Modify option.
- 4. Click the **Import** ^{Import} button. A confirmation pop-up box appears.

eOPFAV	
2	Do you want to import into the currently open document?
	Yes No
Click Y e The Pa	es Yes button. ge Import dialog box appears.

6. Select the desired document, and click the OK button.
A confirmation box displays the following message "New page was saved successfully."
Click the OK OK button.

5.



- 7. Click the **Exit** button.
- Click the "<u>Please click here to return to eOPF</u>" link. The Search Results page reappears.

6.3 Modifying Document Index Information

Sometimes you may need to change the indexing information in eOPF to match the official document. For example, if a mistake was made with the indexing when a scanned document was entered into eOPF, users can correct it with this option.

To modify a document index:

- 1. Select a **Reason** for viewing the eOPF.
- Click the Action icon next to the document that has the incorrect indexing information and select the Modify Index Modify Index option. The Modify Document Index page appears.

My eOPF	Original Val	lues	
Search eOPF	Name:	SMITH CHRIS	
Workflow	SSN:	000-00-0018	
Ma Davidla	Eff. Date:	2/23/2003	
my Profile	Form:	NOTIFICATION OF PERSONNEL ACTION	
App Admin	Type:	REALIGNMENT	
User Admin	NOA Code 1:	790	
System Admin	NOA Code 2:		
System Mamm	Exception Con	mment:	
Create SF 75	Folder Side:	Temporary	
Print Folder			
Batch Print	Enter New		
Penerte	Data:	L Show all Forms/Types - including Obsolete (Obsolete Forms/Types are indicated with an ' at the beginning)	
Reputs	SSN:	000-0018	
Pwd Admin			
Transfer	Eff. Date:	2/23/2003	
Logout	Form:	SF 50::::NOTIFICATION OF PERSONNEL ACTION	•
	Type:	REALIGNMENT	-
	1911		
	NOA Code 1:	790	
	NOA Code 2:		
	Exception		
	Comment:		
	Folder Side:	Temporary	
		- contraction of the second seco	
	CONT.		
	SAVE	VANUEL 💋	

 Modify the incorrect indexing information (e.g., *Effective Date, Form Name, Form Type, Folder Side*) and click the Save button.

The **Search Results** page reappears with the correct indexing information displayed.



Chapter 7: Working With eOPF Reports

The eOPF system allows HR specialists and eOPF administrators to view, print, and export standardized reports. The reports are real time data analysis of eOPF users, records, and system usage. The eOPF system administrator creates and defines the various reports HR specialists can view, print, and export if needed.

There are three major report groups: Document Access, System Access, and System Integrity. Document Access reports list types of actions taken on eOPF documents, by whom, and when. System Access reports detail system access. System Integrity reports verify data integrity of the repository if there is a system or hardware failure, or some system threat. If you need different reports, request that your eOPF system administrator create the new report.

7.1 Viewing And Printing Reports And Logs

HR specialists may view and print reports on demand. The procedure is the same for viewing all of the reports.

To view and/or print an eOPF report:

1. From the eOPF main menu, click the **Reports** button.

The **Reports** page appears.



ft Internet Explorer		
		SPECIALIST HR Help FAQ Home
Reports capability allows the a user to n their eOPF application. The user must t additional field criteria is presented all	acquire information regarding 'Document Access first select a report category and then select a owing the user to customize the conditions used	s', 'System Access' and 'System specific report. Depending on the to produce the report.
ories: ACCESS V ents - Created by HR Specialist v ents - Created by HR Specialist ents - Modifications ents - Viewed 50s Report fored To Deleted Folder Side Report ments - All Actions ments - All Actions	Filter By Viewer SSII: SSI # Lookup Filter By Owner SSII: SSI # Lookup Filter By Document Effective Date: From: (MM.DD/YYY) To: (MM.DD/YYY) Filter By Date Viewed: From: (MM.DD/YYY) To: (MM.DD/YYY)	
60 BACK CLEAR		
	Reports capability allows the a user to in their eOPF application. The user must t additional field criteria is presented all price: ACCESS ▼ tents - Created by HR Specialist rents - Created by HR Specialist rents - Viewed 50s Report towed To Deleted Folder Side Report ments - Report CEAR CEAR CEAR CEAR	: Reports capability allows the a user to acquire information regarding 'Document Access in their eOFA application. The user must first select a report category and then select a t additional field criteria is presented allowing the user to customize the conditions used price: ACCESS V Filter By Viewer SSI: SSI # Cooluge Filter By Document Effective Date: From: (MM.DD/YYY) To: (MM.DD/YYY) Filter By Date Viewed: From: (MM.DD/YYY) To: (MM.DD/YYY) Filter By Date Viewed: From: (MM.DD/YYY) To: (MM.DD/YYY) COERCE COERC

- 2. Select from **Report categories**, the desired **Reports**, and input report filters.
- 3. Click the **View Report VIEW REPORT** button. The report appears.



Click the Print button.
 The Print the Report box appears.



🕙 Print the Repo	ort - Microsoft Internet Explorer	
Page Range:	◯ All	
	Pages:	
	From: 1 To: 1	
To Print:		
 In the next dialog the OK button. 	that appears, select the "Open this file" (option and click
2. Click the printer in button on your inter	con on the Acrobat Reader Menu rather t net browser.	han the print
	OK	Cancel

5. Select pages of the report to print, and click the **OK OK** button.

The report appears as a PDF document.

🗐 http	ttp://coors/demo40/EOPF/EOPF.aspx - Microsoft Internet Explorer								
Ð	🗎 🖃 🗳 - I	🧼 🧼 🚺 / 1 🛛 🚺	🖑 🤻 💿	🖲 65% 🕶 🥖	🖉 - 📑 🔂 Find]•		
۵	eOPF Roles Report "Note: This report is designed to show user's Group membership(i) and Role in eOPF system. Users assigned only to eOPF USERS group are not shown!								
ee.			eOPF Roles I	Report					
?		Group Name	Superuser	Investigator	Supervisor	Page 1 of 12			
	BECK, FRED (PO ID: 1005								
		eOPF Users	Yes	No	No		-		
		eOPF HR SPECIALISTS	Yes	No	No		-		
		eOPF_AVI	Yes	No	No				
	BROWN, LEROY (PO ID:]								
		eOPF Users	Yes	No	No				
		eOPF HR SPECIALISTS	Yes	No	No				
		eOPF_AVI	Yes	No	No				
(Uj	BROWN, LEROY (PO ID:]								
Ŭ		eOPF Users	Yes	No	No				
1		eOPF HR SPECIALISTS	Yes	No	No		~		
	11.00 x 8.50 in 🔇			Ш			>		

Click the Print button.
 The Print settings box appears.



Microsoft Office Document Image Writer Name: Microsoft Office Document Image Writer Status: Ready Type: Microsoft Office Document Image Writer Driver	Properties Comments and Forms: Document and Markups
Print Range ● All ● Current yiew ● Current page ● Pages 1 Subset: All pages in range ● Reverse pages ● Page 4 ● Copies: 1 © Collate Page Scaling: Shrink to Printable Area ♥ Auto-Botate and Center ● Choose Paper Source by PDF page size	Preview: Composite
Print to file Print color as black Printing Lips Advanced	Units: Inches Zoom: 100% 1/1 (1)

Select the desired print parameters and click the OK
 DK button.

7.2 Exporting Reports And Logs

The eOPF system allows HR specialists and eOPF administrators to export reports and logs. The procedure is the same for viewing all of the reports.

To export reports and logs:

From the eOPF main menu, click the **Reports** button.
 The **Reports** page appears.



🛃 eOPF - Rej	oorts - Microsoft Internet Explorer	
		SPECIALIST IN Links - L. FAQ - L. Hang
My eOPF Search eOPF	Reports : Purpose: The Reports capability allows the a user to	acquire information regarding 'Document Access', 'System Access' and 'System
Workflow My Profile App Admin	Integrity within their eOP+ application. The user must selected report additional field criteria is presented al Benorts categories:	Trist select a report category and then select a specific report. Depending on the owing the user to customize the conditions used to produce the report.
Create SF 75 Print Folder	Active Documents - Created by HR Specialist	SSN # Lookup
Batch Print Reports Pwd Admin	Active Documents - Created by HR Specialist Active Documents - Modifications Active Documents - Viewed Cancelled SF 505 Report Desversetb Mared T& Decided Folder Side Deced	Filter By Owner SSI: SSI #: Lookup Filter By Document Effective Date:
Transfer Logout	Purged Documents - All Actions Purged Documents Report	From: (MM.DD/YYYY) To: (MM.DD/YYYY) Filter By Date Viewed:
		From: (MM.DD.YYYY) To: (MM.DD.YYYY)
	VIEW NEPORI GU BACK CLEAN	
S Done		Stocal intranet

- 2. Select the **Report categories**, the desired **Reports**, and input report filters.
- 3. Click the **View Report VIEW REPORT** button. The report appears.

🗿 eOPF - Repo	orts - Microsoft Internet Explorer	i								
							^			
No =0.95	Demonte i									
Sauch af HE	Reports :	llower they a uncer to accord	uico information concer	ding Theorem A	const Western Accord	and Westman				
Washilaw	Strot RV/ Purpose: The Reports capability allows the a user to acquire information regarding? Document Access', "System Access' and "System success", Interprive within their eOFF-application. The user must first select a report category and their select a specific report. Depending on the									
No Profile	elected report additional field crite	ria is presented allow	ng the user to customi	ze the conditions	used to produce the rep	ort.				
App Admin	BACK 👉									
Create SF 75	🖓 🥶 🏪 н ч э н	1 /12	Main Report 💌 👘							
Print Folder	BECK, FRED (PO ID: 1005			BASINGS OFFICES						
Batch Print	BROWN, LEROY (PO ID: 1									
Reports	BROWN, LEROY (PO ID: 1				COPF B	oles Report				
Pwd Admin	CHEEKS, MARY (PO ID: 10				torra	ones report				
Transfer	CHEEKS, MARY (PO ID: 10			*Note: This rep	ort is designed to show user Users assigned only to eO	s Group membership(s) and Ro PF USERS group are not shown	le in eOPF system. I			
Internet	CRAWFORD, STEVE (PO I									
	CRAWFORD, STEVE (PO I				eOPF F	oles Report				
	EOPF, ABBOT (PO ID: 100									
	EOPF, ABBOT (PO ID: 100									
	EOPF, ABBOT (PO ID: 100:		Group Name		Superuser	Investigator	Supervisor			
	HANS-SMITH, CINDY (PO I									
	HANS-SMITH, CINDY (PO I	BECK, FRED (PO ID:	1005)							
	HIGHTOP, MARK (PO ID: 1		eOPF Users		Yes	No	No			
	HIGHTOP, MARK (PO ID: 1			5.0111 1070			N a			
	HR, SPECIALIST (PO ID: 1		CONFINCTION	ECIALIS18	Yes	NO	NO			
	JAMES, EDWARD (PO ID:		ROPE AV		Yee	No	No			
	JAMES, EDWARD (PO ID:		2011 2441		163					
	JAMES, SUSAN (PO ID: 10						~			
<							2			
2							Local intranet			

4. Click the **Export** button displayed above the report. The **Export the Report** box appears.



🕙 Export the Report -	Microsoft Internet Explorer	
File Format:	Adobe Acrobat (PDF)	~
Page Range:	 O Pages: From: 1 	
	ок	Cancel

5. Select the report **File Format**, and click the **OK**

The report appears in the selected format.

🗐 http	://coors/demo40/EOPF	/EOPF.aspx - Microsoft Inte	rnet Explorer				\mathbf{X}	
	🗎 🖃 🗳 -	🔶 🍦 🚺 / 1 🛛 🚺	🖑 🥰 💿	۰ 65% -	🖉 - 📑 🔂 Find]•	
۵	eOPF Roles Report "Note: This report is designed to show user's Group membership(s) and Role in eOPF system. Users suigned only to GOPF USERS group are not shown!							
60			eOPF Roles I	Report				
?		Group Name	Superuser	Investigator	Supervisor	Page 1 of 12		
	BECK, FRED (PO ID: 1005							
		eOPF Users	Yes	No	No		=	
		eOPF HR SPECIALISTS	Yes	No	No			
		eOPF_AVI	Yes	No	No			
	BROWN, LEROY (PO ID:]							
	, , , , , , , , , , , , , , , , , , ,	eOPF Users	Yes	No	No			
		eOPF HR SPECIALISTS	Yes	No	No			
		eOPF_AVI	Yes	No	No			
Ø	BROWN, LEROY (PO ID:]	eOPF Users	Yes	No	No			
7		eOPF HR SPECIALISTS	Yes	No	No		~	
	11.00 x 8.50 in 🔣			1111				

6. Click on **Save** or **Save a Copy**, depending on the file format selected.

The **Save As** pop-up box appears.





7. Type the desired document **File Name**, and click the **Save Save** button.





Chapter 8: Transfer Administration

The eOPF system allows HR specialists with Transfer Capability to electronically transfer an employee's OPF to another eOPF participating agency.

When transferring an OPF, eOPF pre-selects required transfer documents and allows the Losing Agency HR specialist to add additional documents necessary to complete the transfer. If a required document was missed or additional documents arrive at the Losing Agency after the transfer, the Losing Agency can transfer additional documents to the Gaining Agency.

Documents transferred from the Losing Agency are placed in the Transferred 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 begin viewing his or her eOPF using the Gaining Agency repository. Once the transfer is complete, the Losing Agency must print a transfer receipt to maintain a record of the transfer and purge the folder.

Currently, there are six potential transfer scenarios:

- 1. Gaining Agency (non-eOPF), Losing Agency (eOPF).
- 2. Gaining Agency (eOPF), Losing Agency (non-eOPF).
- 3. Gaining Agency (eOPF), Losing Agency (eOPF).
- 4. Losing Agency (eOPF), Gaining Agency (NPRC).
- 5. Gaining Agency (eOPF), Losing Agency (NPRC).
- 6. Gaining Agency (eOPF), Losing Agency (NPRC w/ Paper Reinstatement).

This manual covers the most common scenario where both the Gaining Agency and Losing Agency use eOPF.

Note:

Before initiating a transfer, the Gaining Agency must have a folder created either through the Gaining Agency's employee feed into eOPF, or it must be created manually by an administrator.



8.1 Gaining Agency Creates SF 75 Part 1

To create Part 1 of the SF 75:

1. From the eOPF main menu, click the **Transfer** Transfer button.

The **Requested Transfers – Open Transfers** page displays by default.

🕙 Transfer -	🗿 Transfer - Open Transfers - Microsoft Internet Explorer 📃								
	Requested Transfers Tr	New I ransfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out	
	Requested Transfer	s - Open Tran	ansfers Requested Transfers - Create SF 75				Requested Transfers - Create SF 127		
My eOPF	Transfer - Open Transfers :								
Search eOPF	Select a	in Agency:			*				
My Profile	Employ	yee SSN #							
App Admin	L	ast Name:							
Create SF 75	Activity	/ On/After:		~					
Print Folder	Tran	sfer Type: F(OLDER		*				
Batch Print	SUBMIT 🎸	CLEAR							
Reports									
Pwd Admin Transfer									
Logout									

2. Click the **New Transfer** Transfer tab at the top of the page.

							1 3	
Transfer - Rec	quest A Transfer -	Microsoft In	nternet Explore	r				
	Requested Transfers	New Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
	New Transfe	r - Request A	Transfer	New Transf	er - Create SF 75	Ne	w Transfer - Crea	ite SF 127
My eOPF	Transfer -	Request	a Transfe	n :				
Search eOPF	Sele	ct an Agency:			~			
Workflow My Profile	Em			SEARCH				
App Admin		Name:						

Transfer Type: FOLDER

CLEAR

 \sim

Create SF 75 Print Folder

Batch Print Reports Pwd Admin Transfer Logout ~

The New Transfer – Request a Transfer page opens.



Transfer - Cr	eate SF 75 - Micr	osoft Internet	Explorer					
	Requested Transfers	New Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
	New Transf	fer - Request A	Transfer	New Transf	er - Create SF 75	Nes	v Transfer - Crea	te SF 127
My eOPF	Create SF	75 :						
Search eOPF								
Workflow	Enter S	SN #:						
My Profile		SUBMIT	CLEAR	-				
App Aamin								
Create SF /S	Name:							1
Batch Print	SSN:							
Reports	Form	SF 75						
Pwd Admin	Type:	EMPLOYEE						
Transfer								
Logout		Temporary	• O Perform	nance	ODeleted	🔘 Tran	sferred	
	Folder Side:	Permanent			Cancellation			
100		Orennanen		J	Cancenador			
1.11	Eff Date:		~					
		p						,
	CREATE SF 75	PREVIEW						
	INSERT	CANCEL 💋						

3. Click the New Transfer – Create SF 75 tab.

4. Enter the SSN of the employee that will be transferred and click the Submit submit button. The employee's Name and SSN will appear or a message displays "You do not have access to this OPF. Contact your eOPF administrator."

🕙 Transfer -	- Create SF 75 - N	licrosoft Inter	net Explorer					
	Requested Transfers	New Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
	New Transf	er - Request A	Transfer	New Transfe	er - Create SF 75	Nex	w Transfer - Crea	te SF 127
My eOPF	Create SF	75 :						
Search eOPF Workflow	Enter S	SN #: 500-	00-0009					
My Profile		SUBMIT	CLEAR					
App Admin								
Create SF 75 Print Folder	Name:	SMITH, JOHN						
Batch Print	SSN:	500-00-0009						
Reports	Form:	SF 75						
Pwd Admin	Type:	EMPLOYEE						
Transfer Logout	Folder Side:	• Temporary	r OPerform	ance	O Deleted	() Tran	sferred	
	Eff Date:		~					
	CREATE SF 75	PREVIEW CANCEL Ø	1					



- 5. Select the appropriate **Folder Side** and **Eff Date** (Effective Onboard Date).
- 6. Click the Create SF 75 CREATE SF 75 button.
- 7. Complete Part 1 and click the **Back To eOPF** BACK TO eOPF button.
- Click the Insert button to electronically store the employee's SF 75 data. A confirmation appears stating that the SF 75 was created successfully.
- 9. Click the New Transfer Request a Transfer tab.

Transfer - Re	equest A Transfer - Microsoft In	ternet Explorer					
	Requested New Transfers Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
	New Transfer - Request A	fransfer	New Transfe	er - Create SF 75	Nev	v Transfer - Crea	te SF 127
My eOPF	Transfer - Request	a Transfei	r :				
Search eOPF	Select an Agency:			~			
Workflow My Profile	Employee SSN #			SEARCH 🔍			
App Admin	Name:						
Create SF 75	Transfer Type:	FOLDER		~			
Print Folder	SUBMIT 🎻 CLEAR						
Batch Print							
Reports Pwd Admin							
Transfer							
Logout							

- 10. Select the appropriate information from the agency you are requesting the transfer:
 - From the Select an Agency drop-down list.
 - Enter the Employee SSN # and click the Search SEARCH Search button to confirm the employee name.
 - Select SF 75 from the Transfer Type dropdown list.



Transfer - Request	Transfer - Request a Transfer :											
Select an Agency: Office of Personnel Management												
Employee SSN #	555-44-3333 SEARCH	<u></u>										
Name:	TEST, TRANSFER											
Transfer Type:	SF75	~										
SUBMIT 🛷 CLEAR												
CHECKALL UNCHECKALL	REQUEST CANCEL											
Form Send Vie	w Doc Modify Create Date	Eff Date NOA Code Folder Side										
SF 75	▲ 4/5/2007 2:28:21	PM 4/1/2007 Temporary										

- 11. Click the **Submit** button to submit the SF 75 request.
- 12. Select the Send checkbox next to the SF 75 document you created earlier in this process, and click the Request Request https://www.example.com button to transfer the document. A confirmation pop-up box appears.
- 13. Click the OK ok button to confirm the transfer request.
 A confirmation page displays the following message "Action has been initiated on Transfer Service.", click OK.

8.2 Losing Agency Completes The SF 75

To complete SF 75:

1. From the eOPF main menu, click the Transfer

Transfer button.

The **Requested Transfers – Open Transfers** page displays by default.



🕘 Transfer -	Open Transfers - I	Microsoft Int	ernet Expl	lorer					
						10.00			
	Requested Transfers	New Transfer	Reproce Transf	ess / fer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
	Requested Trans	sfers - Open T	ransfers	Reques	ted Trans	fers - Create SF 75	Reques	ted Transfers - Cr	eate SF 127
My eOPF	Transfer -	Open Tra	ansfers	s :					
Search eOPF	Sele	ect an Agency:				~			
Workflow My Profile	Employee SSN #								
App Admin		Last Name:							
Create SF 75	Act	tivity On/After:			~				
Print Folder	1	ransfer Type:	FOLDER			*			
Batch Print	SUBMIT 🎸	CLEAR							
Reports Paud Admin									
Transfer									
Logout									

- 2. Select the appropriate information the employee will be transferring to:
 - From the **Select an Agency** drop-down list.
 - Enter at least one other criteria such as Employee SSN #, Last Name, and Activity On/After.
 - Select SF 75 from the Transfer Type dropdown list.
- 3. Click the **Submit SUBMIT** button.

Requested Transfers	New Transfer	Reproc Trans	æss / fer	History- Sent	- His Requ	tory- ested	Send To NPRC	Received Transfers	Transfers Out		
Requested Tran	ested Tran	sfers - Cre	ate SF 75	Reques	ted Transfers - C	reate SF 127					
Transfer -	Transfer - Open Transfers :										
Sel	ect an Agency	United St	tates Coa	ast Guard		*					
En	nployee SSN #										
	Last Name										
Ac	tivity On/After	4/1/2007	'	*							
-	Fransfer Type	SF75				*					
SUBMIT 🛷	CLEAR										
Name	Trans	fer Deny	SSN		Gaining Agency	Transfer Type	Activity Date		Status		
TEST, TRANSFER	9 <mark>6</mark>		555-44-3	3333	USCG	SF75	4/17/2007	5:09:59 PM	REQUESTED		

Click the Transfer [№] icon to continue the transfer or click the Deny [™] icon to deny the transfer.



Requested Transfers - Open T	ransfers Req	uested Trans	sfers - Create SF 75	Requested Tra	nsfers - Ci	reate SF 127						
Transfer - Open Transfers :												
Select an Agency: United States Coast Guard												
Employee SSN #												
Last Name:												
Activity On/After		*										
Transfer Type:	SF75		*									
SUBMIT 🛷 CLEAR	1											
CHECK ALL UNCHECK ALL	TRANSFER	CANCEL										
Form Transfer View Mo Doc Inc	dify Complete dex SF75	SSN	Create Date	Eff Date	NOA Code	Folder Side						
SF 75 🔲 🧕 🕯	₩ <mark>\$</mark> ₹75 5	55-44-3333	4/17/2007 5:06:11 PM	4/1/2007		Temporary						

5. Click the **View Doc** icon to view Part 1 of the SF 75 and click the **Complete SF 75** icon to complete parts 2, 3 and 4 of the SF 75.

Complete S	Complete SF 75										
Enter SSN #: 222-22-0003											
SUBMIT 🛷 CLEAR											
Name:											
SSN:											
Form:	SF 75										
Type:	EMPLOYEE										
Folder Side:	• Temporary	O Performance		O Cancellation							
	O Permanent	Overseas	ODeleted	O Transferred							
Eff Date:		*									
COMPLETE SF75	PREVIEW										
INSERT	CANCEL 🙆										

- 6. Enter the SSN of the employee that will be transferred and click the **Submit** button.
- 7. Select the appropriate **Folder Side** and **Eff Date** (Effective Onboard Date).



- 8. Complete part 2, 3, and 4, and click the **Back To eOPF BACK TO eOPF** button.
- Click the Insert button to insert the updated SF 75 into the employee folder. A confirmation appears stating that the SF 75 was created successfully.

Requested Transfers	New Transfer	Reproc Trans	æss / fer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out				
Requested Tra	nsfers - Open 1	Transfers	Requ	ested Transf	iers - Create SF 75	Reques	ted Transfers -	Create SF 127				
Transfer -	Transfer - Open Transfers :											
Se	Select an Agency: United States Coast Guard											
E	mployee SSN #	222-22-0	003									
	Last Name	:										
A	ctivity On/After	:		*								
	Transfer Type	SF75			*							
SUBMIT 🛷	CLEAR											
		-										
CHECKALL	UNCHECK ALL	TRANSFE	R	CANCEL								
Form Transfe	r View Mo Doc In	odify Com dex SF	plete 75	SN	Create Date	Eff	Date NOA Code	Folder Side				
SF 75		*	75 22	2-22-0003	5/2/2007 3:32:57 PI	M 5/1/	2007	Temporary				
SF 75		1	75 22	2-22-0003	5/2/2007 3:36:29 PI	M 5/1/	2007	Temporary				

10. Select the **Transfer** checkbox next to the SF 75 with the most recent **Create Date** (the SF 75 updated with parts 2, 3, and 4), and click the **Transfer**

button. A confirmation pop-up box appears.

11. Click the OK OK button to confirm the transfer request.
 A confirmation page displays the following message

"Action has been initiated on Transfer Service.", click OK.





8.3 Gaining Agency Receives Completed SF 75

To receive completed SF 75:

- From the eOPF main menu, click the Transfer
 Transfer
 button.
 The Requested Transfers Open Transfers page displays by default.
- 2. Click the **Received Transfers** Transfers tab at the top of the page.

The Transfer – Received Transfers page opens.

🗿 Transfer -	Received Transfe	rs - Microso	ft Internet Explor	er				
					100			
	Requested Transfers	New Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out
My eOPF	Transfer -	Receive	d Transfers	:				
Search eOPF	Select	an Agency:			~			
Workflow My Profile		Reason:		~				
App Admin	Empl	loyee SSN #						
Create SF 75		Last Name:						
Print Folder	Activ	ity On/After:		*				
Batch Print	Tra	insfer Type:	FOLDER		*			
Reports	SUBMIT 🞻	CLEAR						
Pwd Admin			-					
Iransfer								
Logout								

- 3. Select the appropriate information the employee will be transferring to:
 - From the Select an Agency drop-down list.
 - Enter at least one other criteria such as Employee SSN #, Last Name, and Activity On/After.
 - Select SF 75 from the **Transfer Type** dropdown list.
- 4. Click the **Submit SUBMIT** button.



Requested Transfers	New Transfer	Reprocess / Transfer	History- Sent	History- Requested	Send To NPRC	Received Transfers	Transfers Out					
Transfer -	Transfer - Received Transfers :											
Select an Agency: Office of Personnel Management												
	Reason:		v									
Empl	oyee SSN #	222-22-0003										
	Last Name:											
Activ	ity On/After:		*									
Тга	nsfer Type:	SF75		~								
SUBMIT 🔗	CLEAR											
CHECKALL	UNCHECK ALL	ACKNOWLEDGE	CANCEL									
Name	Send a	Ack. SSN	Losing Tr Agency St	ansfer Activit atus	У	Activity Date	Doc Count					
THREE, SCENARIO		222-22-0003	OPM DE	LIVERED DOCUM	ENTS RECEIVED	5/2/2007 3:43:13 P	PM 1					

5. The SF 75 is now located in the employee folder. Review the SF 75 and click the Ack. icon to acknowledge the SF 75 transfer and continue. A confirmation page displays the following message "Action has been initiated on Transfer Service.", click OK.

8.4 After The Completed SF 75 Is Received

Due to the necessary requirements involved in the transfer process between the Gaining Agency and the Losing Agency, we will cover the remaining steps with a summarization.

After the Gaining Agency receives a completed SF 75, the following steps need to take place:

- 1. Gaining Agency receives the completed SF 75 and uses it to create a record in the HRIS system projecting the EOD date. The employee starts, which establishes the EOD date.
- 2. At the next pay cycle, a new EDF record and pick-up SF 50 are generated for the Gaining Agency, and are transmitted to eOPF and loaded. The pick-up SF 50 and folder request to transfer must be sent to the Losing Agency.



- 3. Losing Agency receives the transfer request and transfers the selected documents to the Gaining Agency.
- 4. Losing Agency executes the eOPF transfer. All permanent documents are automatically transferred and placed on the Transferred folder side. The documents still exist in the system, but are no longer accessible, except by users that have access to the Transferred folder side. The employee's folder status will be "Transfer Delivered", which is no longer accessible by the employee or supervisor.
- 5. Gaining Agency confirms the correct number of documents is received and the form numbers match the agency forms list. Those not matching are marked as "Other".
- 6. Gaining Agency acknowledges that the documents are received and transmits a confirmation receipt.
- 7. Losing Agency receives the transfer complete notice from the Gaining Agency, verifies the number of transferred documents, archives the SF 75 and pick-up SF 50, then stores the transfer complete notifications in paper form in a separate location. The eOPF account status automatically changes to "Transfer Confirmed", at which time the Losing Agency must purge all documents from the employee's folder.





Glossary Of Terms

TERM	DEFINITION								
Add Clip	An icon used to add documents to a paper clip that was previously assigned to a folder.								
Administrator	Users with special access to setup, modify, and delete eOPF system parameters.								
Annotation	Notes added to an employee's eOPF document.								
Folder	A container for documents.								
Modify	A function that allows a user to add or delete pages to a document.								
Modify Index	A function used to alter the indexing of a document within a folder.								
Clip Folder	Logical grouping of documents within a folder.								
View Doc	Icon 🔯 used to view eOPF documents.								







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R

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Viewer																											. (3	
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