EHRI
Enterprise Human Resources Integration

eOPF v4.1

Electronic Official Personnel Folder (eOPF)
User Guide

From: ENTERPRISE HUMAN RESOURCES INTEGRATION
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Chapter 1: Introduction to eOPF

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 Resources (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 United States Office of Personnel Management (OPM) regulations.

The eOPF provides electronic, Web-enabled access to OPF for all employees, supervisors, and HR staff members to view eOPF documents. All employees are able to view their own OPF through the eOPF Web interface. The eOPF also allows supervisors to have view-only access to specific documents contained in the eOPF of employees who report directly to them.

eOPF has security measures in place to ensure the integrity of the system. For example, users are able to view their own eOPF documents, but cannot modify the documents. Additionally, all activity performed in the eOPF is logged and can be accessed through various reports.

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

The eOPF has a variety of functions that are accessible depending upon the role of the logged in user. This User Guide covers the basic employee role and assumes you have working knowledge of Microsoft Windows desktop. This Guide covers topics for installed versions of eOPF. If you do not have access to the Internet or the eOPF application, please contact an eOPF administrator to assist you with setup.

IMPORTANT!
This User Guide includes representative pages from the eOPF; however, your system may be slightly different depending upon your agency’s requirements. In addition, some functionality is optional and may or may not be configured for your system.
Chapter 2: Browser and Viewer Requirements

To access and utilize the eOPF, you must use two basic off-the-shelf software components: a Web browser application and Adobe Acrobat Reader. The Web browser enables you to view the various system pages such as Logon and Search. Adobe Acrobat Reader enables you to view documents.

Browsers

You can use commercially available Web browsers to access the eOPF. For best results, it is recommended that you use the latest version of Microsoft Internet Explorer.

Note:
eOPF has a session timeout feature that uses pop-up window functionality. If your browser or other software is disabling pop-up windows from displaying, you may be unable to see inactivity warnings. Enabling pop-ups for eOPF allows inactivity warnings to display to prevent the user from being logged out for inactivity without notice.

Downloading and Configuring the Viewer (Adobe Reader)

The eOPF 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 option can be accessed by selecting Edit -> Preferences -> Internet in Adobe Reader v6.x version.
Chapter 3: Getting Started with eOPF

Before you can perform any activity within the eOPF, 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, you are prompted to answer some questions. If you answer correctly, you are allowed to reset your own password. If you answer incorrectly your information is directed to the help desk.

Note:
At this time, both Single Sign On and eAuthenticate initiatives are being implemented for eOPF. When activated for your agency, you are no longer directly log into the eOPF application. You connect using an agency portal or eAuthenticate portal. The eOPF application’s user ID and password functionality is disabled.

Note:
After three consecutive failed attempts to log on to eOPF, you are 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, remember to safeguard your user name and password. Some guidelines for password security are:

- Do not share your password with anyone.
- Do not write your password down.
- Do not allow anyone to use eOPF with your user name/password combination, because all eOPF 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. If this is the first time you log on to eOPF you are directed to a Security Profile page to configure your self service responses.

To Log on to eOPF:

1. **Launch the eOPF application by opening Internet Explorer and entering the URL assigned to the eOPF.**
   The eOPF User Agreement page displays. Above the Accept button, the administrator may place a system message advertising a specific maintenance event. At other times, a problem message may be displayed and the Accept button disabled.

   This figure displays the eOPF User Agreement page.

2. **Read the User Agreement and click the Accept button.**
   An intermediate page is present while the system determines the authentication mode. Currently, the majority of users are sent to the traditional eOPF Web Logon page. However, some users have access to single sign on resources that bypass the eOPF Web Logon.

   **Note:**
   The URL address for eOPF is https://eopf.nbc.gov/<your agency name>/
page and take the user directly to the *eOPF Welcome* page as shown after step 5.

This figure displays the *Authentication Transition* page.

![Authentication Transition Page](image1)

This figure displays the *eOPF Web Logon* page.

![eOPF Web Logon Page](image2)

3. **In the eOPF ID field, type your user name.**

4. **Type your password in the Password field.**

5. **Click the Submit button to activate logon process.**
   If you have entered in correct information, the *eOPF Welcome* page opens. Please read the content on the Welcome page, as it often has agency and security specific information. Under the “User Info"
portion of the page, please note your email address, the last time you updated your Emergency data, and your password expiration time frame.

The following figure displays the eOPF Welcome page.

**Note:**
If you have not previously logged into a 4.0/4.1 version of eOPF, you are forwarded to the Security Profile page to complete security questions instead of the Welcome page.

**Note:**
If your account is locked out because of entering an incorrect password multiple times, use the Resetting Your Password section.
First Time eOPF Login

The following assumes you have both an eOPF Login ID and a password. If you do not have a password, go to the New User – Request Password topic. The first time a user logs into eOPF successfully, they are required to change their password. The following image displays the Change your Password page.

Once this is complete, you are directed to a Security Profile page to configure your self service responses. On this page, you must answer security questions that are used to allow self service and are also used by the helpdesk to validate your identity. You may also enter an e-mail address for receiving email notifications and indicate to the eOPF application if you are using assistive technology such as a screen reader. The Security Profile page is shown below:
1. Complete the Security Profile page prior to moving on to the eOPF Welcome page.

Choose and answer three personal questions and three helpdesk verification questions from the drop-down question boxes. Optionally, enter email address and state if you are using assistive technology (ex: Screen Reader).

2. Click the Submit button.

If all information is complete, you are directed to the eOPF Welcome page.
New User – Request a Password

If you are a new user to eOPF and do not yet have a password, but have been assigned an eOPF ID, you can request a password using the steps below.

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.

   ![New User - Create Password](image)

   Note:
   You can exit the New User – Password Request page by clicking the Cancel button.

2. Type your eOPF logon ID in the eOPF ID field.
   - Type the last 5 digits of your SSN in the Last 5 digits of your SSN field.
   - Type the first 4 letters of your last name in the First 4 letters of Last Name field. If your last name is less than 4 letters then use your full last name.

3. Click the Submit button.
   The New User – Password Request page reappears displaying the following message “Your password request has been submitted for processing”.

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If your information fails to be verified, you receive an “Access Denied” message. The below message is referred to as an “Access Denied” message throughout the rest of this topic.

If your information was verified, but does not have an email address, then an email is sent to the helpdesk with user information.

After the user is contacted by the helpdesk and a valid email address is in the system, he/she repeats the Request Password process. Upon verifying the user information, the user now successfully receives a new password by email.
Note:
Once you request a new user password, depending on the validation of the information you supplied, you are either emailed a new password directly or the eOPF administrator generates a letter containing your new password. Depending on your organization’s policy, this letter is sent by post office or via email.
Manually Changing Your Password

eOPF provides the ability for you to manually change your password at any time.

To Change Your Password:

1. From the eOPF Welcome page, click the My Profile button.
   The My Profile page appears with the Who Am I? tab active.

   The following figure displays the Who Am I? page.

2. From the WhoAmI page, click the Change Password tab.
   The Change Password page displays.
This figure displays the *Change Password* page.

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

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

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

7. Click the *Update* button, which updates your new password in the eOPF.

**Note:**

You can cancel the password change by clicking the *Cancel* button.
Resetting Your Password

If you forget your password, eOPF has a facility to allow you to request that your password be reset. This link brings you to an eOPF password reset request web page. This web page prompts you for your eOPF ID, the last five digits of your SSN and the first 4 letters of your last name. When you select the Reset Password button, the entries you made are compared against data in the eOPF employee information repository. If all three entered values match the stored values, then eOPF prompts you to answer one of your personal profile security questions. If you answer the question successfully, you are prompted to enter a new password.

Note:
If your account is locked out because of entering an incorrect password multiple times, use the following process to unlock your account.

If the values you entered do not match the values held in eOPF repository, you are prompted to contact the eOPF help desk.

To Request a Password Reset:

1. From the eOPF Web Logon 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 the last 5 digits of your SSN in the Last 5 digits of your SSN field.
   - Type the first 4 letters of your last name in the First 4 letters of Last Name field. If your last name is less than 4 letters, then use your full last name.
3. **Click the **Submit** button.**
Upon successfully verifying the user’s information, the system randomly generates a challenge question the user should know. The image below shows an example challenge question:

**Note:**
If user has not previously answered a security profile question, then the password reset request is directed to the helpdesk.

![Answer Security Question](image)

**Note:**
A failure to answer the challenge question correctly results in the following error message:

![Error Message](image)

4. **If the answer is correct.**
If the user correctly answered the challenge question, then the user is forced to reset their password. The *Password Change* page is shown below:
Note:
A security email is sent to notify the user that their password has been reset. The password is not in this email.

Note:
If the user does not have an email address on file, they don’t receive the security email.
Forgotten Login ID Process

If the user has forgotten their login ID, they go through several security steps to learn their login ID. If the user has never logged in before, they need to go through the conversion process (see Conversion Process section below).

Note:
If you have not logged on before, you need to use the Conversion Process section below.

1. From the eOPF Web Login page, click the Forgot your Login? link.
   The Request your eOPF ID page appears. The following figure displays the Request your eOPF ID page.

2. Type the last 5 digits of your SSN in the Last 5 digits of your SSN field.
   - Type the first 4 letters of your last name in the First 4 letters of Last Name field. If your last name is less than 4 letters then use your full last name.
   - Type your date of birth into the Date of Birth field.

3. Click the Submit button.
   Upon successfully verifying the user's information, the system randomly generates a challenge question the user should know. The image below shows an example challenge question.
Chapter 3: Getting Started with eOPF
Note:
A security email is sent to notify the user that their login ID has been requested. The login ID is not in this email.

Note:
If the user does not have an email address on file, they do not receive the security email.
Conversion/Upgraded User Process

eOPF has many users that already have access to the eOPF application. Also, some agencies may be going through a version upgrade. This section of the manual walks through the process taken by users upgraded from a 3.x release of eOPF to a 4.x release.

For successful logins (users know their login ID and password) – the process would be straightforward. They would be forced to the page with the challenge questions and forced to select and answer prior to being allowed on the system.

Conversion:

If you have not previously logged into a 4.0/4.1 version of eOPF (and have not selected security questions/answers), follow the following scenario.

1. The user inputs their login and password credentials into the login page. The login page is shown below.

![Login Page Image]

2. As the user has both login ID and password, the user can successfully log in. They are required to select and answer their challenge questions. The Security Profile page is shown below.
3. The user chooses and answers three personal questions and three helpdesk verification questions from the drop-down boxes. Optionally, the user enters their email address and states if they are using assistive technology (ex: Screen Reader).

4. Click the **Submit** button

If all information is complete, the user is directed to the eOPF Welcome page.

---

**Note:**

The following process is for those who do not know their login ID or passwords after the first login or conversion process.
The Conversion User Process When User Has Forgotten eOPF ID and/or Password:

The following section walks the user through the scenario of either not knowing their eOPF ID or eOPF password. If the user does not know both he/she needs to contact their HR representative.

Forgotten Password Scenario:

When user clicks on *Forgot Your Password*, the user is asked to provide the following information:

Login ID - Verified by the system

Last 5 Digits of SSN - Verified by the system

First 4 Letters of Last Name (if the last name is less than 4 characters, then the full last name is used, e.g. if Ng is the user’s last name, two characters would be used in the verification process) - Verified by the system

The system looks up the employee using the login ID. The system verifies the remaining information above (SSN and last name check). Failure to be able to look up the user or failure to verify the SSN and last name check would result in an access denied message, e.g. “The information you provided does not match the information in the eOPF system. Please contact the helpdesk at eopf_hd@telesishq.com for assistance”.

Since there are no challenge questions on record for this employee, the password is emailed to the email address on record in eOPF. This would be true in any case that the user had not completed their challenge questions. If no email address is on record, the user is notified to contact the helpdesk.

After successful login, the user is forced through the Challenge Question and Email pages. Please reference the Conversion User section of the manual.
Forgotten Login ID Scenario:

When user clicks on *Forgot Your Login ID*, the user is asked to provide the following information:

- Last 5 Digits of SSN - Verified by the system.
- First 4 Letters of Last Name (if the last name is less than 4 characters, then the full last name is used, e.g. if Ng is the user’s last name, two characters are used in the verification process) - Verified by the system.
- The date of birth mm/dd/yyyy – Verified by the system.

Since the user does not know the login ID, the information above is used to look up the user. The system verifies the remaining information above (SSN, last name check, date of birth). Failure to be able to look up the user (not found or uniqueness problem) or failure to verify the SSN, last name check and DOB check results in an access denied message, e.g. “The information you provided does not match the information in the eOPF system. Please contact the helpdesk at eopf_hd@telesishq.com for assistance.”

Since there are no challenge questions on record for this employee, the login ID is emailed to the email address on record in eOPF. This would be true in any case that the user had not completed their challenge questions. If no email address is on record, the user is notified to contact the helpdesk.

After successful login, the user is forced through the *Challenge Question* and *Email* pages.
Using the Main Menu Buttons

The eOPF main menu buttons display in the left hand margin of your browser page. The following table describes the eOPF buttons.

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My eOPF</td>
<td>Displays all of the contents of your eOPF. You can select individual documents for viewing or printing. See Viewing Your Entire eOPF for details.</td>
</tr>
<tr>
<td>Search eOPF</td>
<td>Displays the Search page from which you can filter the contents of your eOPF. You can view or print documents using this option. See Searching for Specific Documents in Your eOPF for more details.</td>
</tr>
<tr>
<td>Work Flow</td>
<td>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. This button may or may not be enabled for your account. See Workflow for more details.</td>
</tr>
<tr>
<td>My Profile</td>
<td>Displays the Preferences page where user can set general settings such as the Default Forms List shown on the Search page and the number of rows to return in a result set. The workflow preferences are only enabled if you have workflow access. Other tabs include the ability to change/update your email, password, security questions, and emergency data.</td>
</tr>
<tr>
<td>Print Status</td>
<td>Displays the Print Status of Print Requests from My eOPF and Clip Folder pages.</td>
</tr>
<tr>
<td>Logout</td>
<td>Logs you out of the eOPF. See Logging Out of eOPF for more details.</td>
</tr>
</tbody>
</table>
My Profile

The *My Profile* button allows a user to access the information the eOPF application maintains regarding their account. Tabs are listed across the top of the *My Profile* page allowing a user to manage their preferences, email options, emergency data, password and personal security questions.
Who Am I?

This feature provides a way for the eOPF user to get a quick and consolidated view of information about their user account.

1. Click the **My Profile** button on the eOPF main menu.

The **My Profile** page appears with the **Who Am I?** tab active.

The following figure displays the **Who Am I?** page.

![Who Am I? Page](image)

**Purpose:** The Who Am I? feature will allow you to get a quick read-only listing about your account.

<table>
<thead>
<tr>
<th>Label</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name</td>
<td>ALEX DOLAN</td>
</tr>
<tr>
<td>Birth Date</td>
<td>12/19/1975</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:DeleaA@xyz.com">DeleaA@xyz.com</a></td>
</tr>
<tr>
<td>PO ID</td>
<td>1601</td>
</tr>
<tr>
<td>Org Code</td>
<td>02A</td>
</tr>
<tr>
<td>Activity code</td>
<td>A</td>
</tr>
<tr>
<td>Group(s)</td>
<td>eOPF Users</td>
</tr>
<tr>
<td>Folder Site(s)</td>
<td>Cancellation, Overseas, Permanent, Temporary, Transferred</td>
</tr>
<tr>
<td>PO ID(s) Managed</td>
<td></td>
</tr>
<tr>
<td>Folder Status</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>Role</td>
<td>Basic User</td>
</tr>
<tr>
<td>Super Admin</td>
<td>No</td>
</tr>
<tr>
<td>Active Start Date</td>
<td></td>
</tr>
<tr>
<td>Active End Date</td>
<td></td>
</tr>
</tbody>
</table>
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 the Workflow Preferences tab does not appear.

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 Specialists 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 may exceed three hundred forms.
To Change Your Preferences (General):

1. Click the **My Profile** button on the eOPF main menu.
   The **My Profile** page appears with the **Who Am I?** tab active.

   The following figure displays the **Who Am I?** page.
2. Click the **Preferences** tab at the top of the page. The **Preferences - General Preferences** page appears, see figure below:

![Preferences - General Preferences](image)

**Preferences - General Preferences**

**Purpose:** This feature allows you to set your preferences whenever you login to eOPF. Choose the settings that you would like to see during document and folder search.

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

4. Select which fields you'd like to see in the **Results list displayed at folder level**.
The choices are: Social Security Number (SSN), First Name, and Last Name.

5. **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 produce a list of forms that are owned by the particular agency that you are a member of.

6. Select which fields you’d like to see in the results list displayed at **document level**.
The choices are: Form Number, Form Description, Type Description, NOA Code 1, NOA Code 2, Side by Side, Create Date, Side, Exception Comment, and Print.
7. Select if you are using Assistive Technology. If you would like to have pages display altered to improve performance when using Assistive Technology software such as JAWS. This mode alters the pages so that accessibility tools can perform actions and receive prompts for action. “Select the No” option to re-enable the standard page display.

8. 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.

---

**Preferences - General Preferences:**

**Purpose:** This feature allows you to set your preferences whenever you login to *eOPF*. Choose the settings that you would like to see during document and folder search.

Settings updated: Some of these settings will take effect next time you log into *eOPF*.

<table>
<thead>
<tr>
<th>Number of Rows per Page (Display)</th>
<th>20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select Results Display (Folder)</td>
<td></td>
</tr>
<tr>
<td>Display SBN column with Folder results</td>
<td></td>
</tr>
<tr>
<td>Display Last Name column with Folder results</td>
<td></td>
</tr>
<tr>
<td>Display First Name column with Folder results</td>
<td></td>
</tr>
<tr>
<td>Select Default Search Option (Forms)</td>
<td></td>
</tr>
<tr>
<td>All Forms</td>
<td>Agency Forms</td>
</tr>
<tr>
<td>Select Results Display (Document)</td>
<td></td>
</tr>
<tr>
<td>Display Form Number column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Form Description column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Type Description column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display NOA Code 1 column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display NOA Code 2 column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Side by Side column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Create Date column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Folder Side column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Exception Comment column with Document results</td>
<td></td>
</tr>
<tr>
<td>Display Print column with Document results</td>
<td></td>
</tr>
<tr>
<td>Are you using assistive technology?</td>
<td>No</td>
</tr>
</tbody>
</table>

---

**32 Chapter 3: Getting Started with *eOPF***
To Change Your Preferences (Workflow):

1. Click the **My Profile** button on the eOPF main menu. The **My Profile** page appears with the **Who Am I?** tab active.

The following figure displays the **Who Am I?** page.

![Who Am I? Page](image)

**WhoAmI?**

**Purpose:** The WhoAmI? feature will allow you to get a quick read-only listing about your account.

<table>
<thead>
<tr>
<th>Label</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Name</td>
<td>ALEX DOLAN</td>
</tr>
<tr>
<td>Birth Date</td>
<td>12/19/1975</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:DolanA@byz.com">DolanA@byz.com</a></td>
</tr>
<tr>
<td>PO ID</td>
<td>1601</td>
</tr>
<tr>
<td>Org Code</td>
<td>02A</td>
</tr>
<tr>
<td>Activity code</td>
<td>A</td>
</tr>
<tr>
<td>Group(s)</td>
<td>eOPF Users</td>
</tr>
<tr>
<td>Folder Side(s)</td>
<td>Cancellation, Overseas, Permanent, Temporary, Transferred</td>
</tr>
<tr>
<td>PO ID(s) Managed</td>
<td></td>
</tr>
<tr>
<td>Folder Status</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>Role</td>
<td>Basic User</td>
</tr>
<tr>
<td>Super Admin</td>
<td>No</td>
</tr>
<tr>
<td>Active Start Date</td>
<td></td>
</tr>
<tr>
<td>Active End Date</td>
<td></td>
</tr>
</tbody>
</table>

*Additional Rights:*
2. Click the **Workflow Preferences** tab at the top of the page.
   The *Preferences - Workflow Preferences* page appears, see figure below:

   ![Preferences - Workflow Preferences](image)

   **Note:**
   If you do not have workflow access, the *Workflow* tab is not visible.

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 work item settings.
5. Click the **Apply** button.
The *Preference* page displays a message “User Preference settings updated”.

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

![Preferences - Workflow Preferences](image)

**Preferences - Workflow Preferences**

**Purpose:** This feature allows you set your workflow preferences. The workflow inbox will display items based on the settings below.

Settings updated. Some of these settings will take effect next time you log into eOPF.

**Max. Number of Workflow Items to Display:** 90

**Display Process:**

**Display Task:**

**Display InfoSource:**

<table>
<thead>
<tr>
<th>Worklist Settings</th>
<th>Workitem Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ All</td>
<td>✗ All</td>
</tr>
<tr>
<td>In Box</td>
<td>Normal</td>
</tr>
<tr>
<td>Pending</td>
<td>FYI</td>
</tr>
<tr>
<td>Distribution</td>
<td>Copy</td>
</tr>
<tr>
<td>Fetch</td>
<td>Return Copy</td>
</tr>
<tr>
<td>Outstanding Copy</td>
<td>Preview</td>
</tr>
<tr>
<td></td>
<td>Completed</td>
</tr>
</tbody>
</table>

**Note:**

To cancel and return to eOPF Welcome page, click 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 My Profile button on the eOPF main menu.
   The My Profile page appears with the Who Am I? tab active.

   The following figure displays the Who Am I? page.

<table>
<thead>
<tr>
<th>Label</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Name</strong></td>
<td>ALEX DOLAN</td>
</tr>
<tr>
<td><strong>Birth Date</strong></td>
<td>12/15/1975</td>
</tr>
<tr>
<td><strong>Email Address</strong></td>
<td><a href="mailto:DelanA@xyz.com">DelanA@xyz.com</a></td>
</tr>
<tr>
<td><strong>PO ID</strong></td>
<td>1901</td>
</tr>
<tr>
<td><strong>Org Code</strong></td>
<td>02A</td>
</tr>
<tr>
<td><strong>Activity code</strong></td>
<td>A</td>
</tr>
<tr>
<td><strong>Group(s)</strong></td>
<td>eOPF Users</td>
</tr>
<tr>
<td><strong>Folder Sides</strong></td>
<td>Cancellation, Overseas, Permanent, Temporary, Transferred</td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
<td><strong>Folder Status</strong></td>
<td>ACTIVE</td>
</tr>
<tr>
<td><strong>Role</strong></td>
<td>Basic User</td>
</tr>
<tr>
<td><strong>Super Admin</strong></td>
<td>No</td>
</tr>
<tr>
<td><strong>Active Start Date</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Active End Date</strong></td>
<td></td>
</tr>
</tbody>
</table>

Additional Rights:
2. Click the **Change Email** tab at the top of the page.
   The *Change Email* page appears, see figure below.

   ![Change Email Page](image)

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

4. **Click the **Update** button.**
   *The eOPF Welcome page appears with the updated email address displayed.*

   ![Update Button](image)

The following figure displays the *Change Email* tab with a confirmation message.

   ![Confirmation Message](image)
The email address is immediately changed in the *User Info* part of the *Welcome* page.

---

**Welcome to the eOPF System**

**Introduction:**

The eOPF System contains electronic copies of the documents that make up your Official Personnel File. Your eOPF may not contain copies of all documents that were created, as many of these documents have not been scanned in yet. If you have questions concerning the technical aspects of the eOPF, email the eOPF administrator at eopfadmin@opm.gov

Questions concerning specific personnel actions should be sent to the appropriate HR representative. Demo40

OPM Web Page...

**User Info:**

- Email: admin@agency.gov
- Emergency Data last updated on 1/6/2004

---

**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 My Profile button on the eOPF main menu.
   The My Profile page appears with the Who Am I? tab active.

   The following figure displays the Who Am I? page.

   ![Who Am I? page](image-url)

   **Purpose:** The WhoAmI? feature will allow you to get a quick read-only listing about your account.

<table>
<thead>
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<tbody>
<tr>
<td>Full Name</td>
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<td>Activity code</td>
<td>A</td>
</tr>
<tr>
<td>Group(s)</td>
<td>eOPF Users</td>
</tr>
<tr>
<td>Folder Site(s):</td>
<td>Cancellation, Overseas, Permanent, Temporary, Transferred</td>
</tr>
<tr>
<td>PO ID(s) Managed:</td>
<td></td>
</tr>
<tr>
<td>Folder Status:</td>
<td>ACTIVE</td>
</tr>
<tr>
<td>Role</td>
<td>Basic User</td>
</tr>
<tr>
<td>Super Admin</td>
<td>No</td>
</tr>
<tr>
<td>Active Start Date:</td>
<td></td>
</tr>
<tr>
<td>Active End Date:</td>
<td></td>
</tr>
</tbody>
</table>

   **Additional Rights:**
2. Click the **Emergency Data** tab at the top of the page.  
The *Emergency Data* page appears, see figure below:

![Emergency Data page](image)

**Emergency Contact Information**:

**ENTRY OF THE FOLLOWING INFORMATION IS VOLUNTARY.**

**Purpose**: This information may be used to notify the individuals of your choice should you be taken ill or injured during work. This information will be available to your supervisor and Human Resource personnel for emergency use only. This information is not to be used for any other purpose. A log is kept showing any time this information is viewed or changed. Only the individual employee is authorized to change this data.

![User Info](image)

3. Edit the desired fields and click the **Apply** button.  
The *Emergency Data* page reappears displaying the message “Emergency data updated successfully”.

---

**Note:**

You can exit the *Emergency Data* page by clicking the **Cancel** button and return to the *eOPF Welcome* page.
Managing Your eOPF Password

The following topics are only relevant to you if you are using the traditional eOPF login page requiring a user ID and password. As the Federal Government implements single sign on and eAuthenticate technologies, the need to maintain an eOPF specific user ID and password cease to exist.

Password Policies

Passwords are used in conjunction with a user name to gain access to the eOPF. eOPF passwords must adhere to the requirements defined by the eOPF administrator. The following password restrictions can be enabled by the eOPF 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 password can be set to expire every 90 days. When your password expires, you are forced to select a new one the next time you log in before proceeding with any other functions.

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.

1. Click the My Profile button on the eOPF main menu.
   The My Profile page appears with the Who Am I? tab active.

   The following figure displays the Who Am I? page.

2. Click the Change Password tab at the top of the page.
   The Change Password page appears, see figure below:
Chapter 3: Getting Started with eOPF 43

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

4. In the **New Password** field, enter your new password.
   The new password must contain at least one upper-case letter, one lower-case letter, one number, and one special character and must be at least 8 characters in length.

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

6. 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.
Change Security Questions

eOPF provides the ability for you to manually change your security questions at any time.

1. From the eOPF Welcome page, click the My Profile button. The My Profile page appears with the Who Am I? tab active.

The following figure displays the Who Am I? page.

### WhoAmI?

**Purpose:** The WhoAmI? feature will allow you to get a quick read-only listing about your account.

<table>
<thead>
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</tr>
<tr>
<td>PO ID</td>
<td>1501</td>
</tr>
<tr>
<td>Org Code</td>
<td>O2A</td>
</tr>
<tr>
<td>Activity code</td>
<td>A</td>
</tr>
<tr>
<td>Group(s)</td>
<td>eOPF Users</td>
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<tr>
<td>Folder Status</td>
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</tr>
<tr>
<td>Role</td>
<td>Basic User</td>
</tr>
<tr>
<td>Super Admin</td>
<td>No</td>
</tr>
<tr>
<td>Active Start Date</td>
<td></td>
</tr>
<tr>
<td>Active End Date</td>
<td></td>
</tr>
</tbody>
</table>

*Additional Rights:*
2. Click the **Change Security Questions** tab. The *Change Security Questions* page appears, see figure below:

3. Choose which security question you would like to change by clicking on the drop-down to the left. Once your question is selected, type in the answer in the box supplied to the right of the question.

4. Repeat Step 3 for each question you would like to change.

5. To save, click the **Update** button below the questions.

6. If you do not want to save the changes, 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.

Welcome to the eOPF System

Introduction:

The eOPF System contains electronic copies of the documents that make up your Official Personnel File. Your eOPF may not contain copies of all documents that were created, as many of these documents have not been scanned in yet. If you have questions concerning the technical aspects of the eOPF, email the eOPF administrator at eopfadmin@opm.gov

Questions concerning specific personnel actions should be sent to the appropriate HR representative. Demo40

OPM Web Page...

User Info:
Email: testuser@test.org
Emergency Data last updated on: 8/8/2007
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
- Discussion of technical issues
- How to contact eOPF support, and
- General information about eOPF solution access
Home link

You can return to the eOPF Welcome page at any time by pressing the Home link at the top of any page.

The following figure shows the Emergency Contact Information page with the Home link circled.
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 are 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 log out of eOPF and automatically close the browser window.

-OR-

Click the **Cancel** button to return to eOPF and continue work.
Session Timeout

For security purposes, your eOPF session timeouts if there is inactivity for a set amount of time (set by the System Administrator) typically set to 15 minutes. To provide the user an opportunity to stop the session timeout from occurring, the user is now prompted when they are 2 minutes from being logged out for inactivity. The countdown is updated every 10 seconds until the 2 minutes have passed. Being logged out includes closing of the browser window.

Session Timeout Process:

1. **After inactivity for a set amount of time the user receives a session timeout pop-up warning.**
   The following figure displays the Session Timeout pop-up.

2. **At this point the user has 120 seconds to either:**
   - **Continue** – the eOPF page refreshes and resets all inactivity timers.
   - **Quit** – the session terminates immediately and the browser window closes.

---

**Note:**
Not responding to the Session Timeout pop-up within 2 minutes results in a session termination and the browser window closes.
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.

eOPF was designed to give you maximum flexibility in viewing your personnel-related documents. You are able to view and print these documents using eOPF.

The eOPF v4 release added a watermark identifying the document as coming from eOPF. This watermark is automatically added to the document when accessing the document using the Show All Docs feature. The eOPF v4.1 release allows a user to view a single document with a watermark. To view a single document with a watermark use the “with watermark” option from the View drop-down within Search Results.
Viewing Your eOPF Documents

Once logged on to the eOPF system, you can click either the *My eOPF* button or *Search eOPF* button to access your OPF information. If you select the “My eOPF” option, you see a listing of all documents stored in your eOPF listed by effective date of the document. If you choose the “Search eOPF” option, you see a filtering page to search for and list specific documents within your eOPF. You can also print one or more documents.

Viewing Your eOPF

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. A second listing automatically opens to display your OPF contents.

**Note:**

If you choose to sort the search results by a certain field, that sort order will be in effect until you sort by another field or log out of eOPF.

The following figure displays the *My eOPF Results* page with the *My eOPF* tab defaulted.

From the *My eOPF Results* page, you can access folder actions by clicking on the *folder* icon:

- Open your eOPF,
- Access *Show All Docs* page and features,
• **Emergency Data** Access your emergency contact info,

• **Clip Folder** Access clip folders associated your eOPF, or

**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.

You can view a document by clicking the 📃 Action button of the corresponding document you want to view and selecting the view 📋 View option.

**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 My eOPF 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 or with a watermark.

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. Search for and locate the eOPF document you would like to view.

4. Click the Action button of the corresponding document you want to view. A pop up menu is activated. 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 (Adobe Acrobat) 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 Specific Documents in Your eOPF

You can search for and display specific documents in your eOPF. For example, this may be helpful if you are searching for a specific document type or looking for documents created in a specific period of time. To search for specific documents, click the Search eOPF button from the eOPF main menu to display the Search page.

From within the Search page, you can narrow your search by Form, Type, Folder Side, Create Date, and Effective Date range. 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 provides the entire list of all forms defined in the eOPF repository. “Agency” option lists 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.

This figure displays the Search page.
To View an eOPF Document Using “Search eOPF”:

1. Click the Search eOPF button on the eOPF main menu to open the Search page, which allows you to view all or a subset of your eOPF.

2. Enter your search criteria to retrieve a list of specific documents in your eOPF.
   For example, you could search for documents on a specific folder side or you could search by document Create Date.

   **Note:**
   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.

3. To retrieve all of your documents, click the Search button.
   Because of the size of the Search page, we have place the action buttons at both the top and bottom of the page. The Search Results page displays when the Search button is activated.

The following figure displays the Search Results page.
Note:
If you choose to sort the search results by a certain field, that sort order will be in effect until you sort by another field or log out of eOPF.

Click the **Show All Docs** button to show all documents that meet the search criteria. The *Show All Documents* page displays.

Note:
By using the *Show All Docs* button, you have the ability to select one or more documents, and have them merged into a single document for viewing/printing in the document viewer.

The following figure displays the *Show All Documents* page.
Viewing Documents from the **Search Results** Page:

You can use the **Search Results** page to view and print a document in your eOPF. Note that you can only view and print documents one at a time from the **Search Results** page. If you want to view and print multiple documents at once, see **Viewing Documents** from the **Show All Documents** page.

**To View Documents from the Search Results Page:**

1. From the top of the **Search Results** page, select whether you want to include annotations or not by choosing an “Annotation” option. There is also an option to include a watermark overlay. (See **Searching for Specific Documents in Your eOPF** for steps on how to display the **Search Results** page.) The default setting is to include any public annotations on the selected documents.

2. Click the **Action** button of the corresponding document you want to view and select the **View** option to view. The document opens in a new window, using Acrobat Reader.

3. If the document contains multiple pages, use the **Next Page** and **Previous Page** buttons located in the document viewer (Adobe Acrobat) to navigate through the document.

4. When you are finished, click the **Close** button in the upper right corner of the document viewer window to close the viewer window.
Viewing Documents from the *Show All Documents* Page:

You can use the *Show All Documents* page to view and print a document in your eOPF. You can view and print multiple documents at once from the *Show All Documents* page. A watermark is inserted on the bottom of each page in the single document generated using the *Show All Documents* feature.

**To View Documents from the *Show All Documents* Page:**

1. From the *Show All Documents* page, click the checkbox(es) corresponding to the document(s) you want to view. (See *Searching for Specific Documents in Your eOPF* for steps on how to display the *Show All Documents* page.)

   **Note:**
   Use the **CHECK ALL** Check All and **UNCHECK ALL** Uncheck All buttons to select and deselect all documents listed.

2. Check the *Print* column on the *Show All Documents* page. If the document is single-sided, click the *Print Single Sided* button. If the document is double-sided, click the *Print Doubled Sided* button.

   A message appears stating that the print request has been submitted for processing.

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

   ![Show All Documents Page](image)

   **Note:**
   You must have access to a duplex printer for double-sided printing.

3. To see the status of your print request, click the **tab** at the top of the screen.
4. The *My eOPF Print Status* page appears displaying all *My eOPF* print jobs.

The following figure displays the *My eOPF - Print Status* page.

5. Click the “View” link next to the print job you would like to view. Acrobat launches and displays the results of the print job.
Changing the Viewing Size of an eOPF Document

Once you open a document, you may need to change the way it appears on your screen. Perhaps you need to change the size to fit in your monitor or you would like to zoom in to view details. The following steps demonstrate how to use the Adobe Acrobat document viewer.

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.

   The following figure displays the “Zoom” drop-down list.

   ![Zoom Drop-down List](image)

   - 1600%
   - 800%
   - 400%
   - 200%
   - 150%
   - 125%
   - 100%
   - 75%
   - 50%
   - 25%
   - 12.5%
   - 8.33%
   - Fit in Window
   - Actual Size
   - Fit Width
   - Fit Height

3. **To return to screen size, select “Fit in Window” from the drop-down list.**
Viewing Annotations within an eOPF Document

The eOPF includes an annotation feature to allow HR specialists to make annotations on documents. Annotations are preserved as transparent layers that sit on top of the original document. As a basic user, you only have access to view public annotations on your folder.

The annotation is attached directly to the page the comment references. You can view or print the document in its original state or with the annotations that have been added. Furthermore, if multiple HR users 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 navigation to each page to view the annotations for that page.

Note:
There are two classifications of an annotation: public and private. Unless you define an annotation as “private,” it can be viewed by anyone who views the document via the eOPF. In addition, a public annotation may be edited or deleted by any HR specialist or supervisor who has the ability to create an annotation. Private annotations can only be viewed and or edited by the user who created the annotation. HR Specialists can view and modify both types of annotations.
To View an eOPF Document:

1. After clicking My eOPF, search for and locate the eOPF document you would like to view. The Search Results page displays.

   The following figure displays the Search Results page.

2. From the “Annotations” drop-down list located at the top of the display, select View Documents with Annotations. This is the default setting.

3. You can view a document by clicking the *Action* button of the corresponding document you want to view and selecting the View option. The document opens using Acrobat Reader in a new window.

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

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

The eOPF allows you to see instruction pages related to forms placed in your eOPF. When an eOPF administrator adds a form to the system, the eOPF administrator can also add instruction pages. If a form includes instruction pages, the icon is enabled on the Action Menu.

To View Document Instruction Pages:

1. After clicking My eOPF, search for and locate the eOPF document in your folder with instructions you would like to view.

The following figure displays the eOPF Search Results page.

2. You can view a document by clicking the Action button of the corresponding document you want to view and selecting the option. The instruction pages open in a new window.

3. If the document contains multiple pages, use the Next Page and Previous Page buttons located in the document viewer to navigate through the document.
4. When you are finished, click the Close button in the upper right corner of the document viewer window to close the viewer window.
Chapter 5: Printing

Although the eOPF is designed to make reviewing your OPF more of a paperless process, there are times when you need a hard copy of an OPF document. You can print documents with or without annotations. There is also an option to include a watermark overlay.

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 and expanding your folder, search for and locate the desired eOPF document to print.

2. You can view a document by clicking the Action button of the corresponding document you want to view and selecting the 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. The Print column may not be visible if disabled in your preferences. See Changing Your Preferences.

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.

![Print Dialog Window](image)

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

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 Entire eOPF or a Subset of Documents Using Search eOPF

eOPF produces search results pages that contain the list of documents matching your search query. You have the option of printing one or more documents directly from the results page, if desired. If you use Show All Docs to print, a watermark is placed on all pages with in the document indicating that the documents came from eOPF.

To Print One or More Documents Based on Search Results:

1. Click the Search eOPF button on the eOPF main menu. The Search page displays.

   This figure displays the Search page.

   ![Search page](image)

2. Enter search criteria to narrow the list of desired documents and click the Search button.

   -OR-

   Click on the Search button without entering search criteria if you desire all documents within your eOPF. The Search Results page displays.
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.

   This figure displays the *Show All Documents* page.

4. **Select the documents to print by clicking on the checkbox(es) to the left of each document. You can select all listed documents by clicking on the Check All button.**

5. **Click either the Print Single Sided or the Print Double Side button located at the top of the page to submit the job for printing.**

   This figure shows the Print Request Confirmation.

6. **The selected document(s) are merged into a single PDF document, a watermark is added to each page indicating the source of the documents as eOPF and the resulting document can be accessed by clicking on the tab.**

   The following figure shows the *My eOPF Print Status* page.
7. To view the print request results, click the View “View” link.

8. To remove the print request that is no longer needed, click the Delete “Delete” link.
Chapter 6: Working with Paper Clips

Paper Clipping Documents within Your Folder

eOPF provides 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 for clipping or to select multiple complete documents to be inserted into a paper clip folder.

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 "all benefit forms associated with the birth of an employee’s child".

eOPF allows you to create two kinds of paper clips – public and private. Any user of the eOPF can see public clips. Private clips can only be seen by the creator, administrator, or HR Specialist that manage the OPFs. “Private” paper clips can be reassigned as “public” paper clips by either the clip owner or the eOPF administrator.

If a document that has been paper clipped to other documents is deleted from the eOPF, the paper clip remains intact (with the other clipped documents), minus the newly deleted and purged document.
Creating a Paper Clip

The first step in using paper clips is to create a new paper clip for a folder.

To Create a New Paper Clip for a Folder:

1. Click the My eOPF button on the eOPF main menu. The Folder page displays a single row representing your eOPF folder.

   The following figure displays the My eOPF Results page.

2. Click on the Folder Action icon and select the “Clip Folder” option to open the Clip Folders page of this folder.
The following figure displays the **Clip Folders** page.

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

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

   eOPF allows you to create two kinds of paper clips – public and private. Any user of the eOPF can see public clips. Private clips can only be seen by the creator, administrator, or HR Specialist that manage the eOPFs.

5. **Click the Insert button.**

6. **Click the Back button to return to the previous page.**
Adding Documents to a Paper Clip

Once you add a paper clip to your folder, you can add additional documents to the paper clip at any time. This can be done from either the My eOPF Results page or from the Show All Documents page.

To Add Documents to a Paper Clip from My eOPF Results Page:

1. Click the My eOPF button on the eOPF main menu. The My eOPF Results page displays your eOPF folder and document contents.

2. On the My eOPF Results page, click the Action button of the corresponding document you want to view and select the Add to Clip Add Clip icon, for the document you want to place in a clip folder.

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

3. 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.

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

<table>
<thead>
<tr>
<th>Owner</th>
<th>Description</th>
<th>Clip Date</th>
<th>Pages</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH, CHRIS</td>
<td>Clip Folder 1</td>
<td>11/14/2009 1:42:26 PM</td>
<td>1</td>
<td>Public</td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>Performance</td>
<td>11/14/2009 1:42:31 PM</td>
<td>2</td>
<td>Public</td>
</tr>
</tbody>
</table>
4. Select the additional pages you want to add to the clip, and then click the Submit button. The Confirmation page appears.

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

The following figure displays the Confirmation Message page.

![Confirmation Message](image)

**Pages have been successfully added to the Clip Folder.**

5. Click the OK button. The Search Results page reappears.
To Add Documents to a Paper Clip from Show All Docs page:

1. **Click the My eOPF button on the eOPF main menu.**
   The My eOPF Results page displays your eOPF folder.
   
   The following figure displays the My eOPF Results page.

2. **From the My eOPF Results page, click the Show All Docs button.**
   The Show All Documents page appears containing only the documents that meet the search criteria.
3. Using the *Show All Docs* page, select the documents you want to add to a clip folder. 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.

4. **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.

The following figure displays the *Confirmation Message* page.
5. Click the OK button.

The Search Results page reappears.
Viewing Documents within a Paper Clip

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

To View Documents Contained within a Paper Clip:

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

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

   ![My eOPF Results page]

2. Click on the *Folder Action* icon and select the “Clip Folder” option to open the *Clip Folders* page for this folder.
This figure displays the *Clip Folders* page.

<table>
<thead>
<tr>
<th>Owner</th>
<th>Description</th>
<th>Clip Date</th>
<th>Pages</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SMITH, CHRIS</td>
<td>Clip Folder 1</td>
<td></td>
<td>Public</td>
</tr>
<tr>
<td></td>
<td>SMITH, CHRIS</td>
<td>Performance</td>
<td></td>
<td>Public</td>
</tr>
</tbody>
</table>

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

This figure displays the *Clip Folder Detail* page.

<table>
<thead>
<tr>
<th>Check Name</th>
<th>Create Date</th>
<th>Eff Date</th>
<th>Form</th>
<th>Action Type</th>
<th>Folder</th>
<th>Page Num</th>
<th>View Clip</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMITH, CHRIS</td>
<td>10/29/2008 4:09:03 PM</td>
<td>10/29/2008 12:30:00 AM</td>
<td>SP 52</td>
<td>REASSIGNMENT</td>
<td>Temporary</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>6/3/2007 8:55:26 AM</td>
<td>7/7/2003 12:00:00 AM</td>
<td>OTHER</td>
<td>POSITION</td>
<td>Permanent</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>6/3/2007 8:55:25 AM</td>
<td>7/7/2003 12:00:00 AM</td>
<td>OTHER</td>
<td>POSITION</td>
<td>Permanent</td>
<td>3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>6/3/2007 8:55:25 AM</td>
<td>7/7/2003 12:00:00 AM</td>
<td>OTHER</td>
<td>POSITION</td>
<td>Permanent</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>6/3/2007 8:55:25 AM</td>
<td>7/7/2003 12:00:00 AM</td>
<td>OTHER</td>
<td>POSITION</td>
<td>Permanent</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMITH, CHRIS</td>
<td>6/3/2007 8:55:25 AM</td>
<td>7/7/2003 12:00:00 AM</td>
<td>OTHER</td>
<td>POSITION</td>
<td>Permanent</td>
<td>2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. **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. A public paper clip can be viewed by any user accessing the selected folder. However, a private paper clip can be viewed ONLY by the user who created the paper clip, an eOPF administrator, and any HR Specialist that manages the OPF.

5. **Click the** Back button to return to the previous page.
Printing Documents within a Paper Clip

Once a paper clip has been created and populated, you can print the documents associated with that clip.

To Print Documents Contained within a Paper Clip:

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

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

   ![My eOPF Results](image)

2. Click on the **Folder Action** icon and select the “Clip Folder” option to open the **Clip Folders** page for this folder.
This figure displays the *Clip Folders* page.

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

This figure displays the *Clip Folder Detail* page.

4. From the *Clip Folder Detail* page, click the checkbox(es) corresponding to the document(s) you want to view.

**Note:**
Use the **Check All** and **Uncheck All** buttons to select and deselect all documents listed.

5. If the document is single-sided, click the *Print Single Sided* button. If the document is double-sided, click the *Print Doubled Sided* button.
A message appears stating that the print request has been submitted for processing.

The following figure displays the *Print Request Confirmation*.

![Print Request Confirmation](image)

**Note:**
You must have access to a duplex printer for double-sided printing.

6. To see the status of your print request, click the **Print Status** button from the menu on the left.

7. The *Print Status* page appears defaulted to the *My eOPF Print Status* tab.
The following figure displays the *My eOPF Print Status* page.

8. Click on the Clip Folder Print Status tab to display the Clip Folder Print Status page.

The following figure displays the Clip Folder - Print Status page.

9. To view the print request results click the View “View” link.
10. To remove the print request that is no longer needed click the **Delete** “Delete” link.

11. Click the **Back** button to return to the previous page.
Removing a Document from a Paper Clip

As your use for paper clips changes over time, you may 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 paper clip from a document does not remove the document from the system. Rather, it removes the association of the document to the other paper clipped documents.

To Remove a Document from a Paper Clip:

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

   The following figure displays the My eOPF Results page.

2. **Click on the Folder Action icon and select the “Clip Folder” option to open the Clip Folders page for this folder.**
The following figure displays the *Clip Folders* page.

3. Click the **Detail** button next to the desired Paper Clip.

The *Clip Folder Detail* page appears.

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

4. Click the **Delete** icon to delete the desired document within the clip. To remove multiple documents from the clip - check off the documents to be deleted and click the **Delete Selected** button.

The document(s) are removed from the clip.
Note:
A paper clip is classified as public or private. A public paper clip can be viewed by any user accessing the selected folder. However, a private paper clip can be viewed ONLY by the user who created the paper clip, a member of the eOPF Administrator user group, or any HR Specialist that manages the OPF.

Note:
Click the Back button to return to the previous page.
Designating a Public Paper Clip as Private and Vice Versa

When a paper clip is assigned the status of “private,” only the creator, the eOPF administrator, and HR Specialists managing the OPF have access to it.

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

1. Click the **My eOPF** button on the eOPF main menu. The **Folder** page displays a single row representing your eOPF folder.

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

2. Click on the **Folder Action** icon and select the “Clip Folder” option to open the **Clip Folders** page of this folder.
3. Click the **Edit** button associated with the document.

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

5. **Edit** the desired fields, and then click the **Update** button.

The **Clip Folders** page reappears displaying the following message: “Selected clip is updated successfully” above the list as shown in the following figure.

This figure displays the **Clip Folders** page with the verification message.
Note:
A paper clip is classified as public or private. A public paper clip can be viewed by any user accessing the selected folder. However, a private paper clip can be viewed **ONLY** by the user who created the paper clip and the eOPF administrator.

6. Click the *Cancel* button to return to abort the edit process.
Deleting a Paper Clip

eOPF provides 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 wish to remove a document from eOPF, please see an eOPF administrator.

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

1. Click the My eOPF button on the eOPF main menu. The Search Results page displays your eOPF folder.

The following figure displays the My eOPF Results page.

2. Click on the Folder Action icon and select the “Clip Folder” option to open the Clip Folders page of this folder.
The following figure displays the Clip Folders page.

### Clip Folders:
Allow to add/modify/delete clip folder. Click on the Detail button to view the clip in the folder.

<table>
<thead>
<tr>
<th>Owner</th>
<th>Description</th>
<th>Clip Date</th>
<th>Pages</th>
<th>Security</th>
</tr>
</thead>
<tbody>
<tr>
<td>LastHR, SPECIALIST</td>
<td>Admin's Test in Employee</td>
<td>10/5/2005 5:56:25 PM</td>
<td>0</td>
<td>Public</td>
</tr>
<tr>
<td>JOE, BASIC</td>
<td>New Clip Folder</td>
<td>1/16/2007 10:50:47 AM</td>
<td>0</td>
<td>Public</td>
</tr>
<tr>
<td>JOE, BASIC</td>
<td>Peter's Test</td>
<td>1/14/2005 1:32:36 PM</td>
<td>3</td>
<td>Public</td>
</tr>
<tr>
<td>JOE, BASIC</td>
<td>TEST</td>
<td>3/15/2005 3:04:33 PM</td>
<td>0</td>
<td>Public</td>
</tr>
</tbody>
</table>

3. **Click the Delete button.**
The Confirmation pop-up box appears.

The following figure displays the Confirmation pop-up box.

![Confirmation Pop-Up Box](image)

**Note:**
To cancel the deletion of the record, click the Cancel button.

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

---

Chapter 6: Working with Paper Clips
The following figure displays the *Clip Folders* page with a confirmation message.

**Clip Folders:**
Allow to add/modify/delete clip folder. Click on the Detail button to view the clips in the folder.

*Selected clip is deleted successfully.*

<table>
<thead>
<tr>
<th>Owner</th>
<th>Description</th>
<th>Clip Date</th>
<th>Pages</th>
<th>Security</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>LastHR: Specialist</td>
<td>Admin’s Test in Employee</td>
<td>10/5/2005 5:56:25 PM</td>
<td>0</td>
<td>Public</td>
<td>Edit</td>
</tr>
<tr>
<td>Joe: Basic</td>
<td>TEST</td>
<td>9/10/2005 3:04:13 PM</td>
<td>0</td>
<td>Public</td>
<td>Edit Delete</td>
</tr>
</tbody>
</table>

1

**Note:**

Click the *Back* button to return to the previous page.
Chapter 7: Logging out of eOPF

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

Note:
You are automatically logged out of the eOPF after the system is idle for a certain amount of time configured by your local Web site 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 prompt is displayed.

The following figure displays the log out confirmation page.
2. Click the OK button to logout and close the browser window.

-OR-

Click the Cancel button to return to eOPF and continue work.
Session Timeout

For security purposes, your eOPF session timeouts if there is inactivity for a set amount of time (set by the System Administrator) typically set to 15 minutes. To provide the user an opportunity to stop the session timeout from occurring, the user is now prompted when they are 2 minutes from being logged out for inactivity. The countdown updates every 10 seconds until the 2 minutes have passed. Being logged out includes closing of the browser window.

Session Timeout Process:

1. **After inactivity for a set amount of time the user receives a session timeout pop-up warning.**
   The following figure displays the *Session Timeout* pop-up.

   ![Session Timeout Pop-up](image)

   - **Continue** – the eOPF page refreshes and resets all inactivity timers.
   - **Quit** – the session terminates immediately and the browser window closes.

2. **At this point the user has 120 seconds to either:**

   - **Continue** — the eOPF page refreshes and resets all inactivity timers.
   - **Quit** — the session terminates immediately and the browser window closes.

---

**Note:**

Not responding to the *Session Timeout* pop-up within 2 minutes results in a session termination and the browser window closes.

---

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## Glossary

<table>
<thead>
<tr>
<th><strong>Administrators</strong></th>
<th>A user that has special access to setup, modify, and delete parameters within the eOPF system.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Contact Information</strong></td>
<td>Data (accessible via Emergency Data tab within My Profile) is voluntarily supplied by employees for use by management during an emergency.</td>
</tr>
<tr>
<td><strong>Groups</strong></td>
<td>A combination of functional processes for which a user is granted access.</td>
</tr>
<tr>
<td><strong>Folder</strong></td>
<td>A container for documents.</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>A complex sequence of characters required for access to the eOPF.</td>
</tr>
<tr>
<td><strong>Password Letter</strong></td>
<td>Notification from the Agency to the employee providing the password for the eOPF.</td>
</tr>
<tr>
<td><strong>Security Access</strong></td>
<td>A level of accessibility to documents and functions within eOPF.</td>
</tr>
<tr>
<td><strong>Supervisor</strong></td>
<td>A user that has access to not only his or her own eOPF, but also is provided with access to view and print documents for employees that he or she supervises.</td>
</tr>
<tr>
<td><strong>View Doc</strong></td>
<td>A icon used to view the documents within a folder.</td>
</tr>
</tbody>
</table>
## Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>eOPF</td>
<td>Electronic Official Personnel Folder</td>
</tr>
<tr>
<td>NOAC</td>
<td>Nature of Action Code</td>
</tr>
<tr>
<td>OPF</td>
<td>Official Personnel Folder</td>
</tr>
<tr>
<td>OPM</td>
<td>Office of Personnel Management</td>
</tr>
<tr>
<td>PDF</td>
<td>Portable Document Format</td>
</tr>
</tbody>
</table>
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