Civilian Human Resources Agency (CHRA)

eOPF Employee Training Manual

ELECTRONIC OFFICIAL PERSONNEL FOLDER (eOPF)

Version1
9/25/12

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Chapter 1: Introduction to eOPF

The Office of Personnel Management (OPM) is changing 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 solution.

What does eOPF mean to Army? The eOPF is designed to electronically store, manage, and distribute OPF documents. All current paper OPF documents are uploaded into the web-enabled eOPF. eOPF stores all OPF documents as Portable Document Format (PDF) files, complete with data describing the folder and its contents. eOPF changes how you and your co-workers access OPF records

Army civilian employees are able to view their own OPFs through this eOPF. 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. In addition, eOPF security logs and tracks every action performed within eOPF. That includes sending a notification to the employee every time a new document is added to their eOPF.

Guidance on what is filed in the eOPF can be found in the Guide to Personnel Recordkeeping (GPR). The GPR is available at: http://www.opm.gov/feddata/recguide2008.pdf.

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 on your agency's requirements. In addition, some functionality is optional and may or may not be configured for your system.

Note:
Army is not using the Emergency Data Tab in eOPF. This information is track in other ways depending on the employee's organization.

Chapter 2: Browser and Viewer Requirements

To access and utilize the eOPF, you must use 2 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.

IMPORTANT!

There is a daily data feed prompted by the Customer Support Unit (CSU) refresh which occurs overnight. This impacts all documents that are loaded into eOPF via an interface (ex. Defense Civilian Personnel Data System (DCPDS), EBIS/IVRS etc.). Documents that are directly loaded and indexed by an Army HR Specialist are viewable instantly.

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 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 helpdesk.

Note:
After three consecutive failed attempts to log on to eOPF, you are locked out of the system as a security precaution.

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, and accessing eOPF online help.

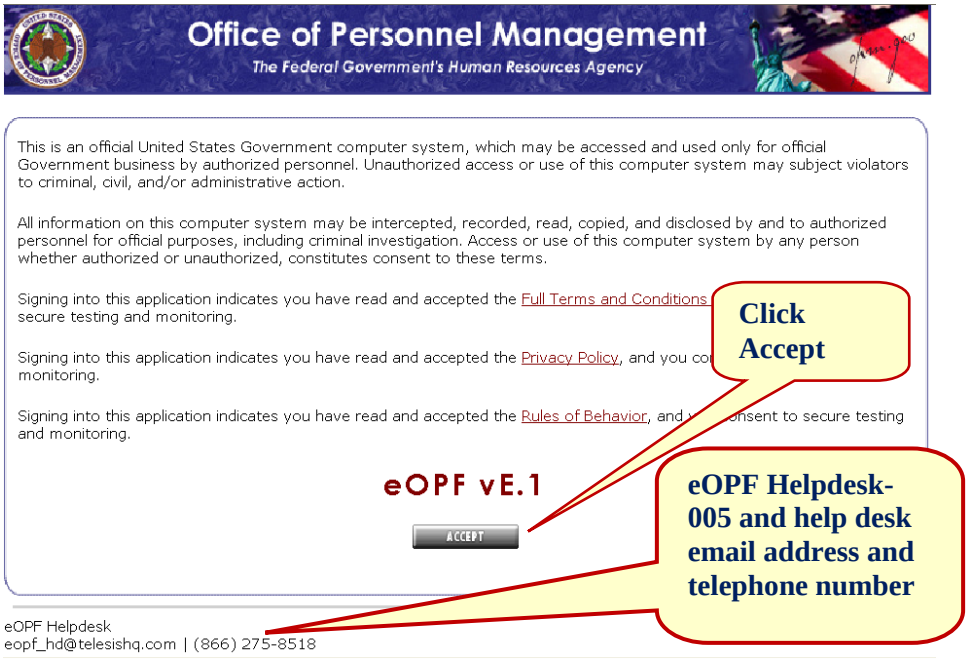
Logging on to eOPF

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 own 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.



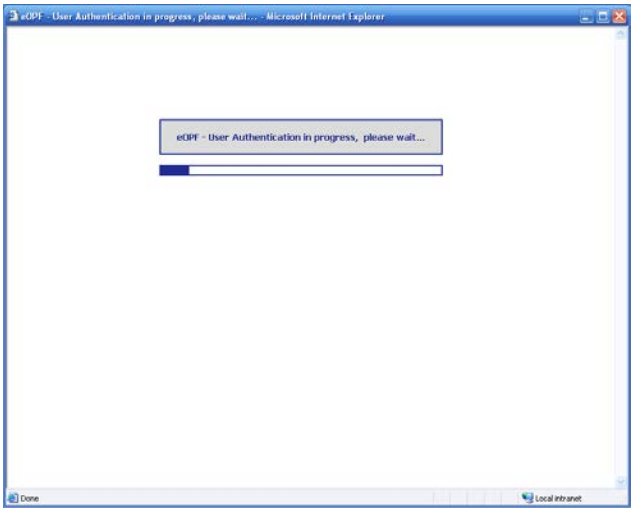
Note:
The eOPF URLs for Army are as follows:

Appropriated Fund (APF) :https://eopf1.nbc.gov/army/

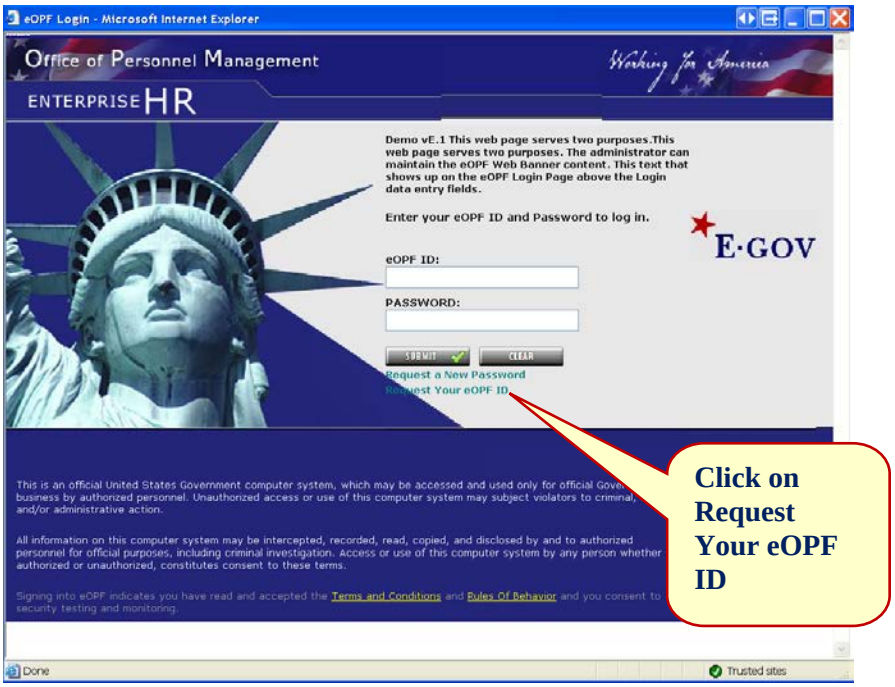
Non-appropriated Fund (NAF): https://eopf1.nbc.gov/armynaf/

2. **Read the *User Agreement* and click the** ACCEPT ***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* page and take the user directly to the *eOPF Welcome* page as shown after step 5.

This figure displays the *Authentication Transition* page.



This figure displays the *eOPF Web Logon* page.



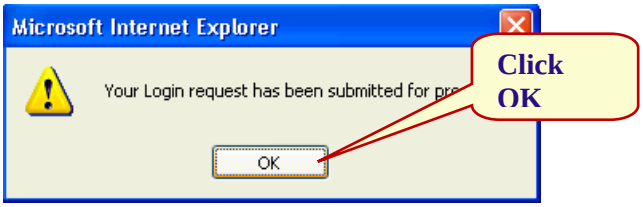
3. From the eOPF Logon screen, click Request Your eOPF ID.

4. From the **Request Your eOPF ID** screen, enter the
• last 5 digits of your SSN
• first 4 letters of your last name
• your date of birth (mm/dd/yyyy)

Click the

Submit **button to activate logon process.**

5. You will see this confirmation message. Click **OK**.

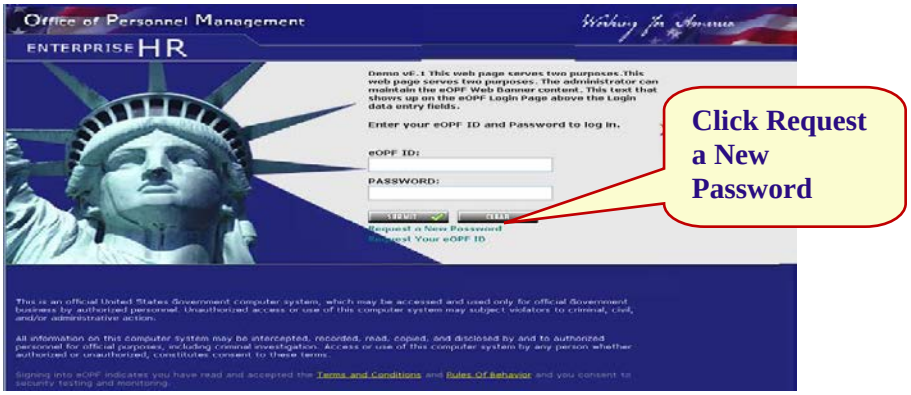


6. You see a message that your login request has been submitted for processing.

Your eOPF ID is sent to your registered agency email address momentarily.
Click the link to return to the **eOPF Logon** screen.

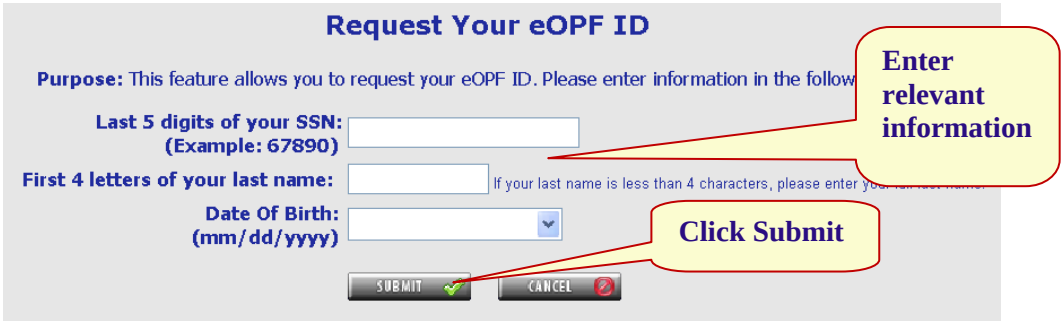
Part 2: Obtain Your eOPF Temporary Password

1. From the **eOPF Logon** screen, click **Request a New Password**.

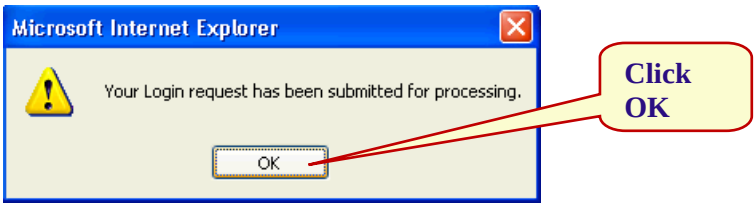


2. On the **Request a New Password** screen, enter your:
- eOPF ID
- last 5 digits of your SSN
- first 4 letters of your last name

Click **Submit**.

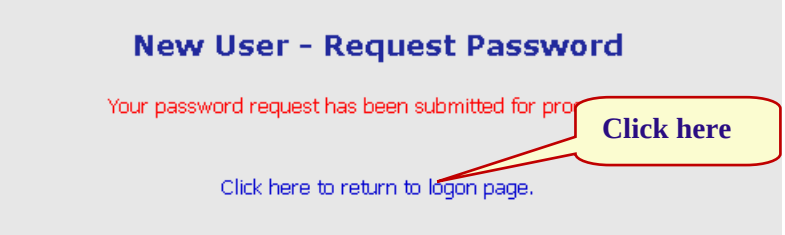


3. The confirmation message displays. Click **OK**.



2. A confirmation message that your login request has been submitted for processing displays.

Your eOPF temporary password is sent to your registered agency email address momentarily.
Click the link to return to the **eOPF Logon** screen.

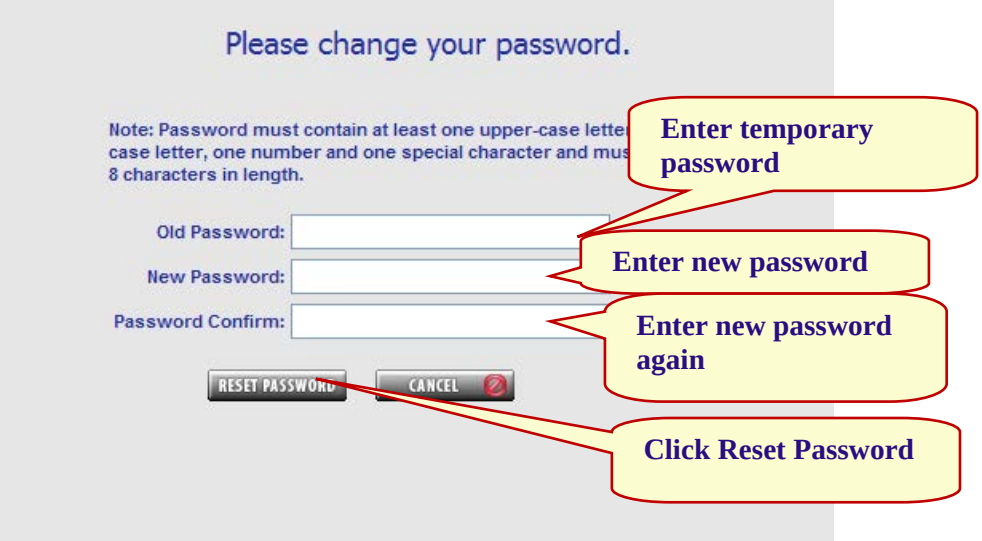


Part 3: First-time eOPF Logon

1. Enter your eOPF ID and temporary password on the eOPF Logon screen.

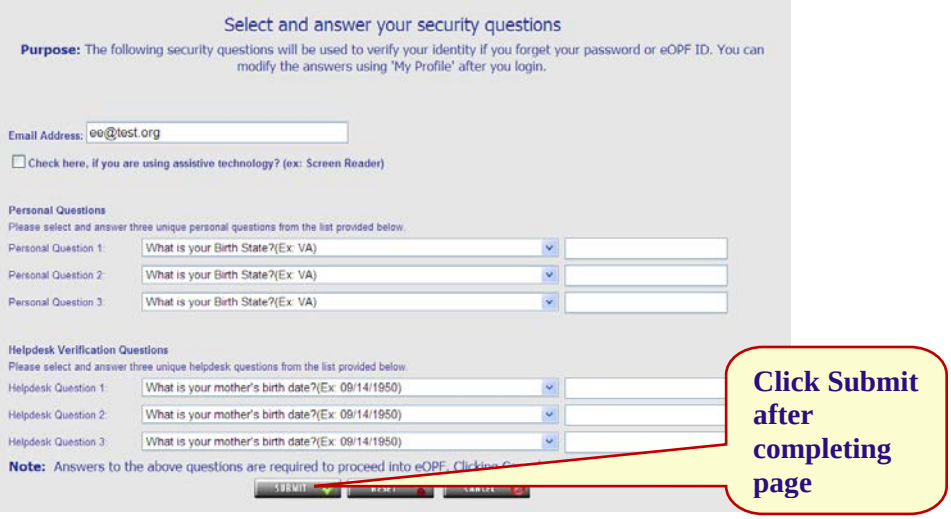
2. Click **Submit**.

3. You are required to change your password the first time you logon to eOPF. The **Please change your password** screen displays.

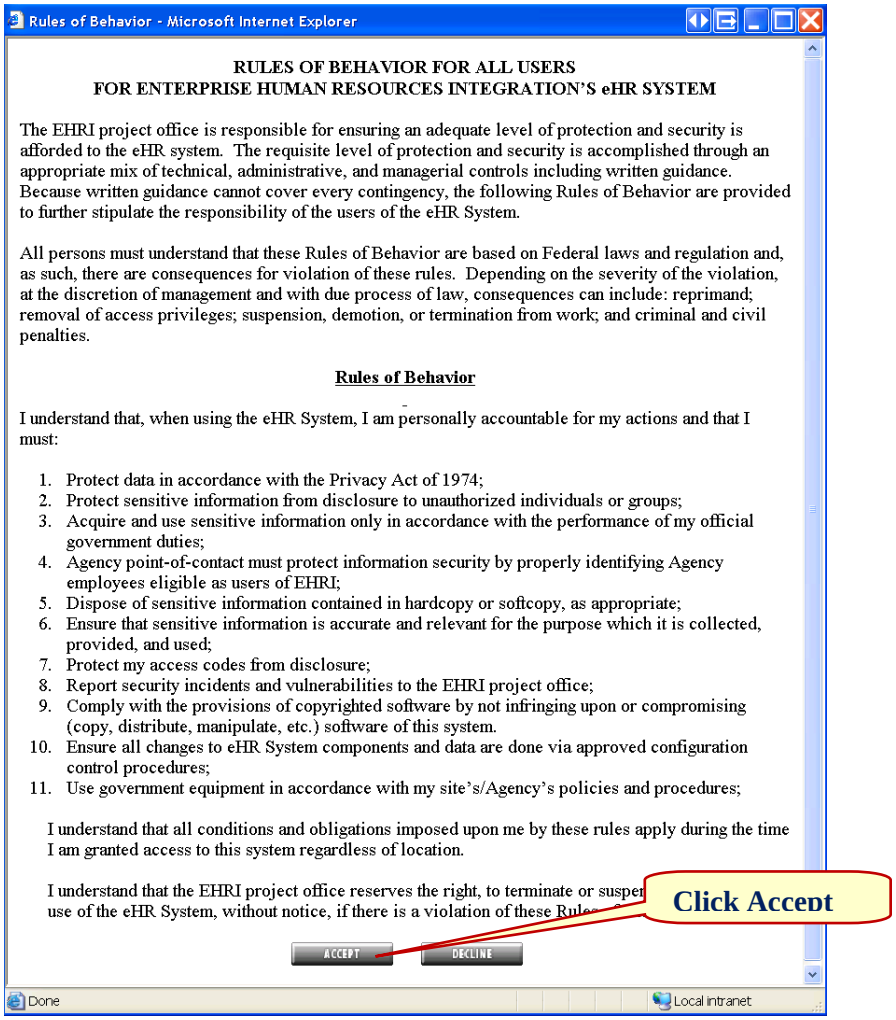


4. The **Select and answer your security questions** screen displays. Here you answer your self-service questions.

Complete the information on this screen and click **Submit**.



The **Rules of Behavior** screen displays. Read the rules and click



5. **Read the rules and click the**

***Accept* button to accept the terms.**
If accept is chosen, you are directed to the *eOPF Welcome* page.

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.

WhoAmI? :

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

OK

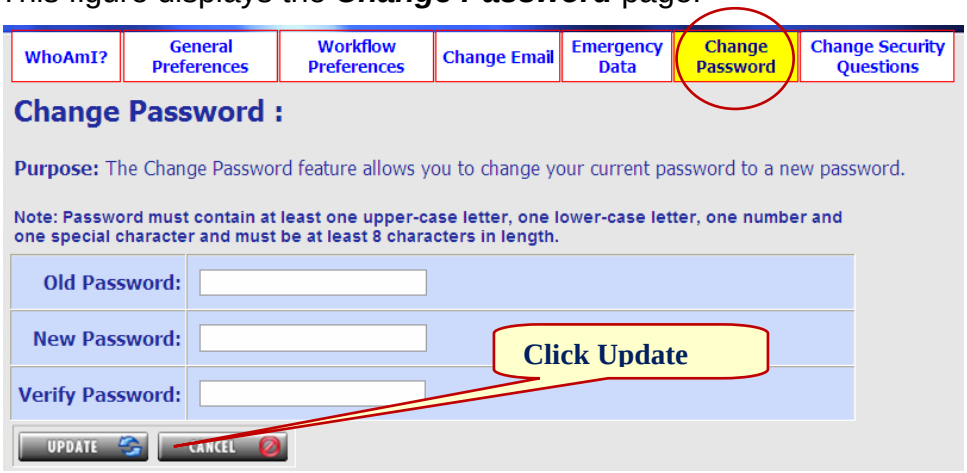
Label	Value
Full Name:	BILL WHITE
Birth Date:	12/19/1975
Email Address:	WhiteB@xyz.com
PO ID:	1601
Org Code:	O3C
Activity code:	A
Group(s):	eOPF Users
Folder Side(s) Accessible in Your eOPF:	Overseas, Performance, Permanent, Temporary, Training
Folder Side(s) Accessible in Other eOPFs:	
PO ID(s) Managed:	1601
Folder Status:	ACTIVE
Role:	Basic User
Super Admin:	No
Active Start Date:	
Active End Date:	

Additional Rights:

2. **From the *WhoAmI?* page, click the**

***Change Password* tab.**
The *Change Password* page displays.

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



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

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, 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 the capability 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 the eOPF repository, you are prompted to contact the eOPF helpdesk.

To Request a Password Reset:

1. **From the *eOPF Web Logon* page, click the *Request a New 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.**

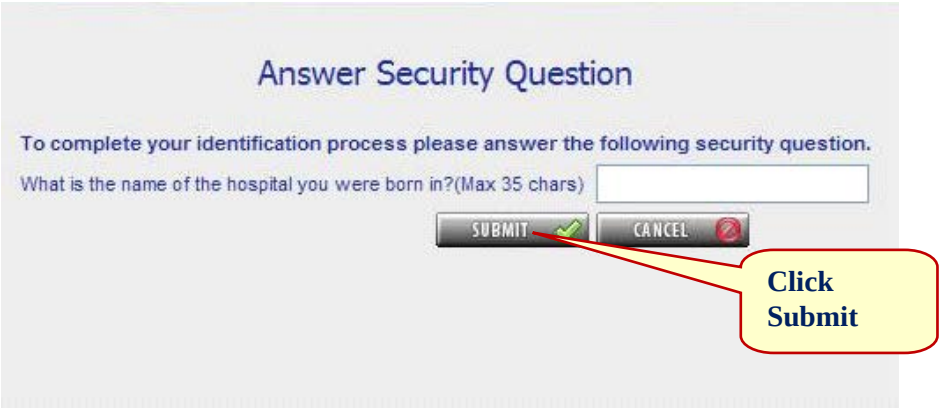
   Type the last 5 digits of your SSN in the *Last 5 digits of your SSN* field.

   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.

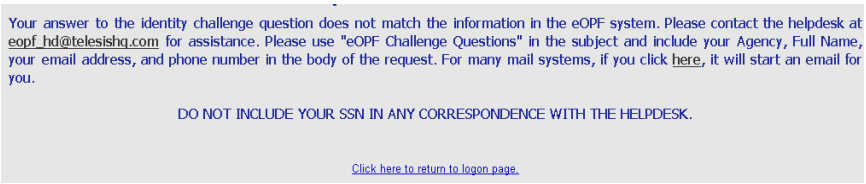
3. **Click the**

***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 the user has not previously answered security profile question then the password reset request is directed to the helpdesk.

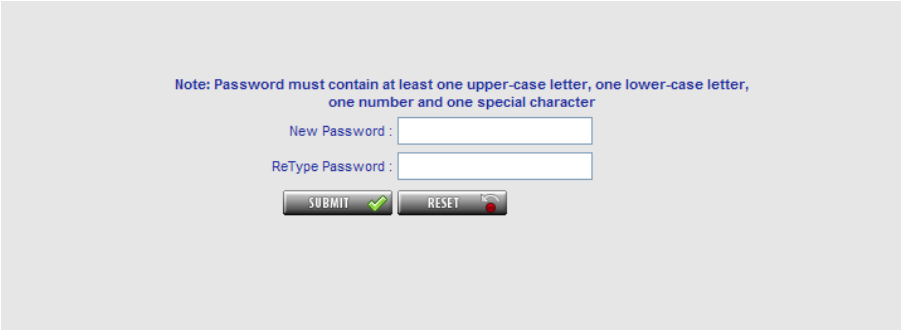


Note:
A failure to answer the challenge question correctly results in the following error message.



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 screen 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 has not yet set up their challenge questions then the password request will be processed and an e-mail will be sent with a new password to the user within 60 minutes of the request.

Note:
If the user does not have an email address on file, they do not receive the security email and will need to contact their Agency HR Representative.

Forgotten Login ID Process

If the user has forgotten their eOPF ID they go through several security steps to learn their eOPF 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 in 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.**

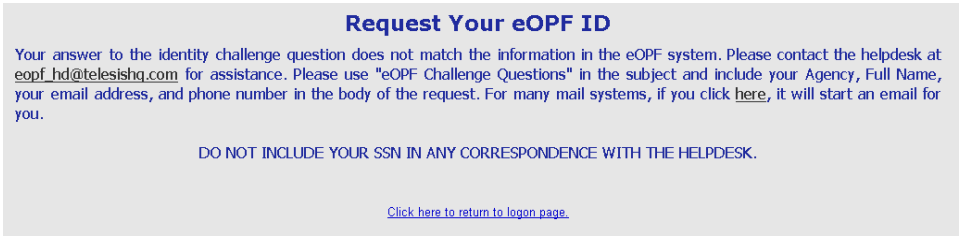
   Type the first 4 letters of your last name in the *First 4 letters of Last Name* field. If your last name is less than 4 letters, then use your full last name.

   Type your date of birth into the *Date of Birth* Field.

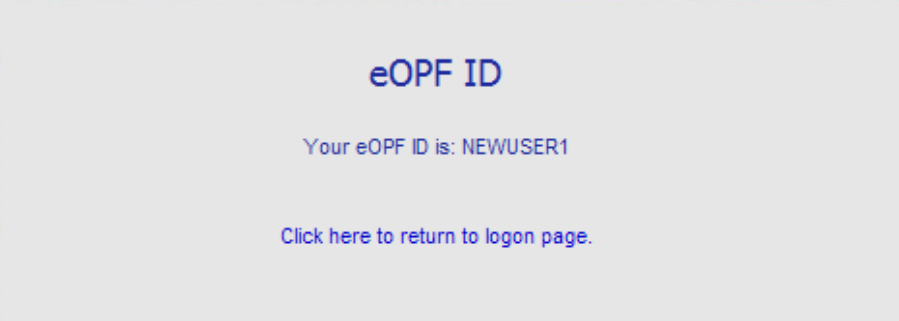
3. **Click the**

***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.

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



4. **If the answer is correct.**
   If the user correctly answered the challenge question, then the user's eOPF ID is displayed on the screen.



Note:
A security email is sent to notify the user that their eOPF ID has been requested. The eOPF ID is not in this email.

Note:
If the user has not yet set up their challenge questions then the eOPF ID request will be processed and an e-mail will be sent with their eOPF ID to the user within 60 minutes of the request.

Note:
If the user does not have an email address on file, they do not receive the security email and will need to contact their Agency HR Representative.

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.

Menu Option	Description
My eOPF	Displays all of the contents of your eOPF. You can select individual documents for viewing or printing. See *Viewing Your Entire eOPF* for details. You can also filter the contents of your eOPF. See *Searching for Specific Documents in Your eOPF* for more details.
My Profile	Displays the *Preferences* page where a 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, and security questions.
Print Status	*Displays the Print Status of Print Requests from My eOPF* and *Clip Folder* pages.
Logout	Logs you out of the eOPF. See *Logging Out of eOPF* for more details.

My Profile

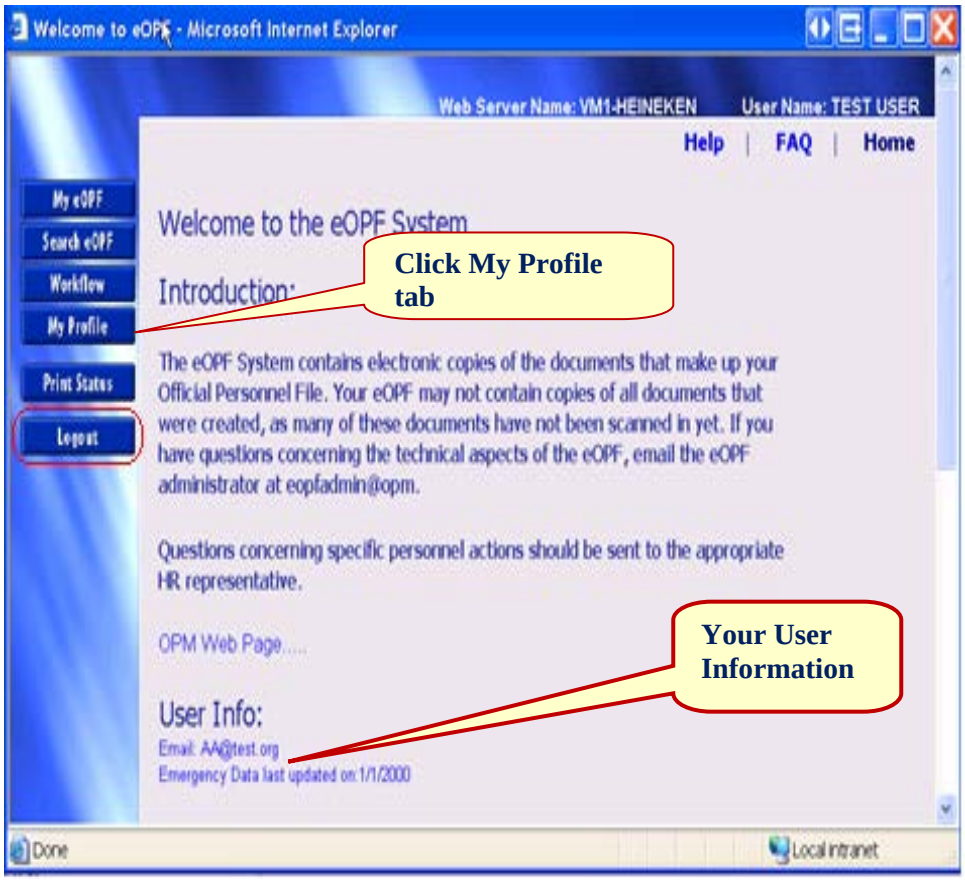
The *My Profile* button allows a user to access the information the eOPF application maintains regarding their account. Tabs are listed across the top of the *My Profile* page allowing a user to manage their preferences, email options, password and personal security questions. If a tab listed below does not appear within eOPF it is possible that your agency has disabled that particular feature.

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.**



Note:

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

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.

OK

Label	Value
Full Name:	BILL WHITE
Birth Date:	12/19/1975
Email Address:	WhiteB@xyz.com
PO ID:	1601
Org Code:	O3C
Activity code:	A
Group(s):	eOPF Users
Folder Side(s) Accessible in Your eOPF:	Overseas, Performance, Permanent, Temporary, Training
Folder Side(s) Accessible in Other eOPFs:	
PO ID(s) Managed:	1601
Folder Status:	ACTIVE
Role:	Basic User
Super Admin:	No
Active Start Date:	
Active End Date:	

Additional Rights:

Note:
You cannot make any changes to this page from this page.

Changing Your Preferences

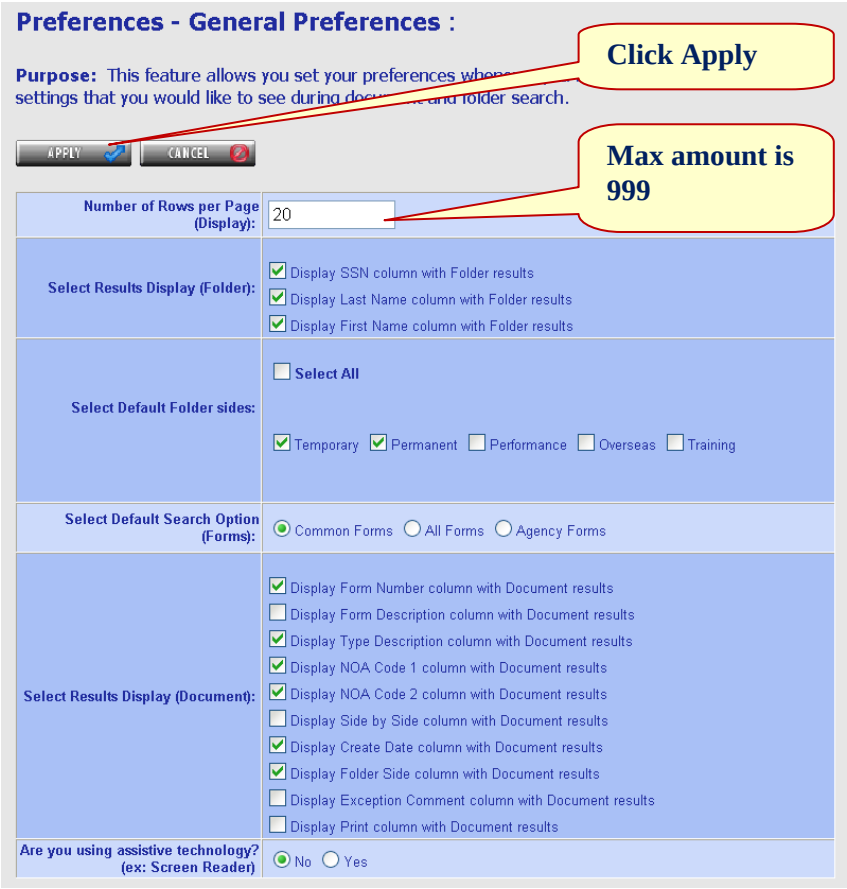
The eOPF application allows users to set specific preferences when using the application. There are 2 types of preferences: general and workflow. Workflow is only accessible if you have workflow enabled for your account. If you do not have a workflow enabled account the *Workflow Preferences* tab does not appear.

From the *General Preferences* tab, a user can set the Default Forms List (provided on the *Search* page) and also the number of rows and 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** General Preferences ***General Preferences* tab at the top of the page.**

The *Preferences – the General Preferences* page appears. See figure below.



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

3. **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.

4. **Select which folder sides you'd like to see in the Results List displayed at folder level by default.**
   The choices are dependent on what your agency currently has configured.

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 produces a list of forms that are owned by the particular agency 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. Use this option 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.

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. If the Change Email tab is not visible it is possible your agency has chosen not to enable the feature.

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.

WhoAmI? :

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

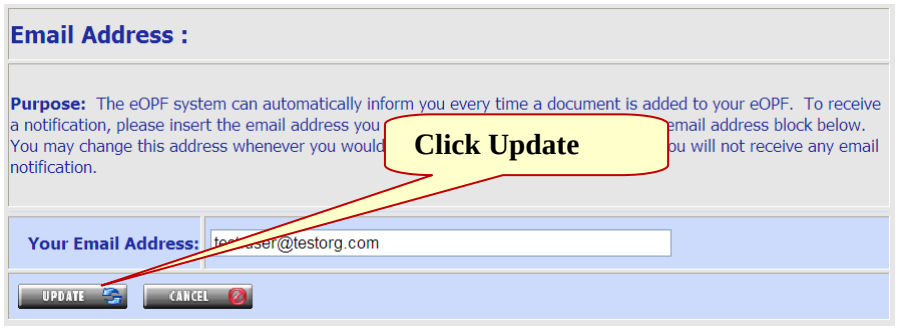
OK

Label	Value
Full Name:	BILL WHITE
Birth Date:	12/19/1975
Email Address:	WhiteB@xyz.com
PO ID:	1601
Org Code:	O3C
Activity code:	A
Group(s):	eOPF Users
Folder Side(s) Accessible in Your eOPF:	Overseas, Performance, Permanent, Temporary, Training
Folder Side(s) Accessible in Other eOPFs:	
PO ID(s) Managed:	1601
Folder Status:	ACTIVE
Role:	Basic User
Super Admin:	No
Active Start Date:	
Active End Date:	

Additional Rights:

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

The *Change Email* page appears. See figure below.

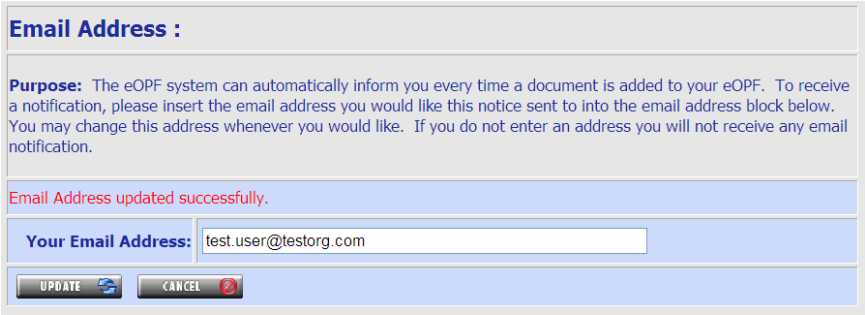


3. **Type your email address in the *Your Email Address* field.**

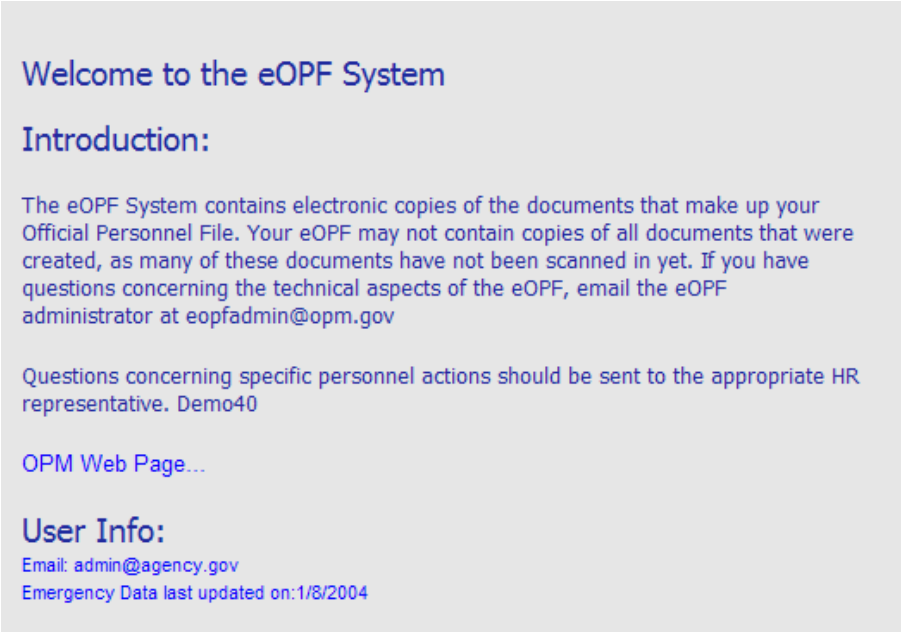
4. **Click the** ***Update*** **button.**

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

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



The email address is immediately changed in the *User Info* part of the *Welcome* page.



Note:

You can exit the *Change Email* 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 an eOPF 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

Note:
Army has your eOPF password 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.

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.

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:

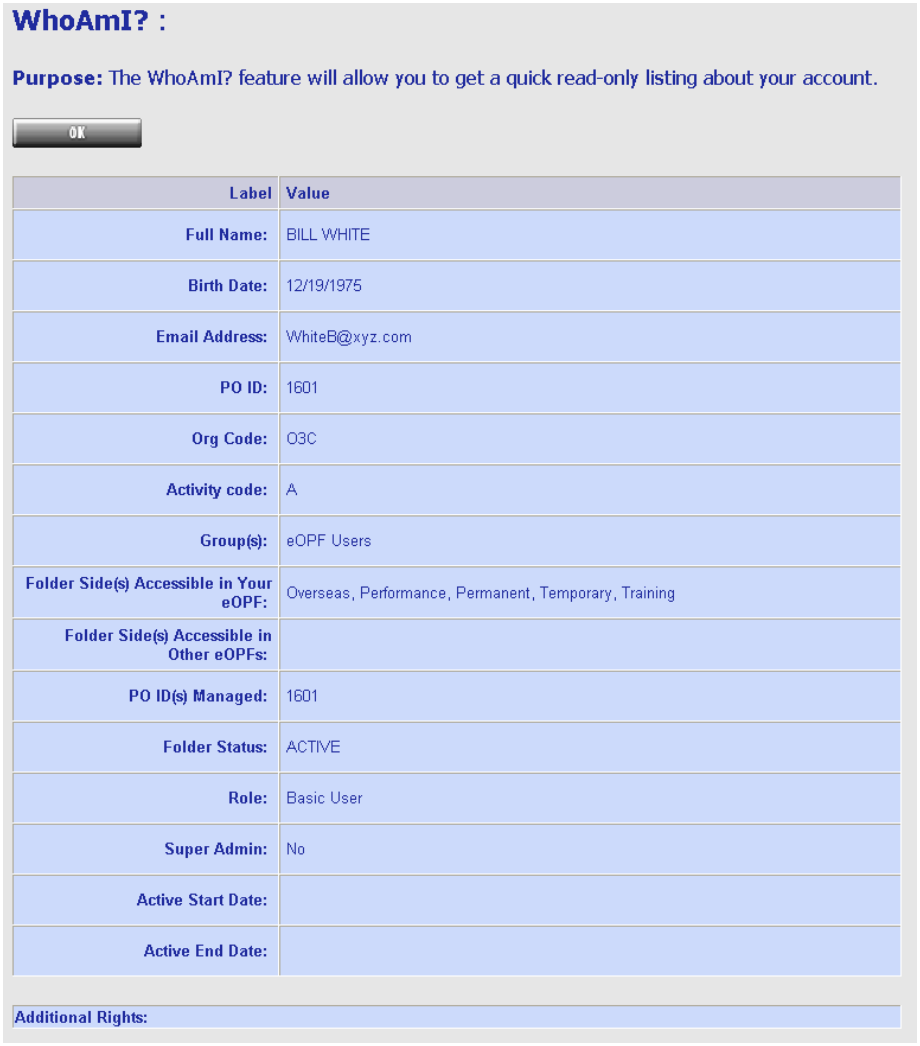
- Passwords cannot be reused for a number of iterations.
- Passwords must be complex (Minimum 8 characters, contain at least one upper-case letter, contain at least one lower-case letter, contain at least one number and contain at least one special character(!,#,$,^,*).
- Passwords must not contain identical, 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 *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.

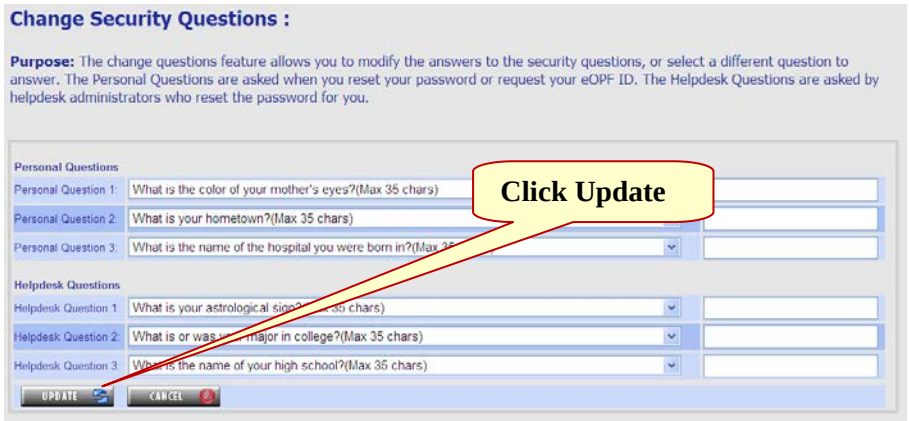
OK

Label	Value
Full Name:	BILL WHITE
Birth Date:	12/19/1975
Email Address:	WhiteB@xyz.com
PO ID:	1601
Org Code:	O3C
Activity code:	A
Group(s):	eOPF Users
Folder Side(s) Accessible in Your eOPF:	Overseas, Performance, Permanent, Temporary, Training
Folder Side(s) Accessible in Other eOPFs:	
PO ID(s) Managed:	1601
Folder Status:	ACTIVE
Role:	Basic User
Super Admin:	No
Active Start Date:	
Active End Date:	

Additional Rights:

3. **Click the Change Security Questions *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 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.**

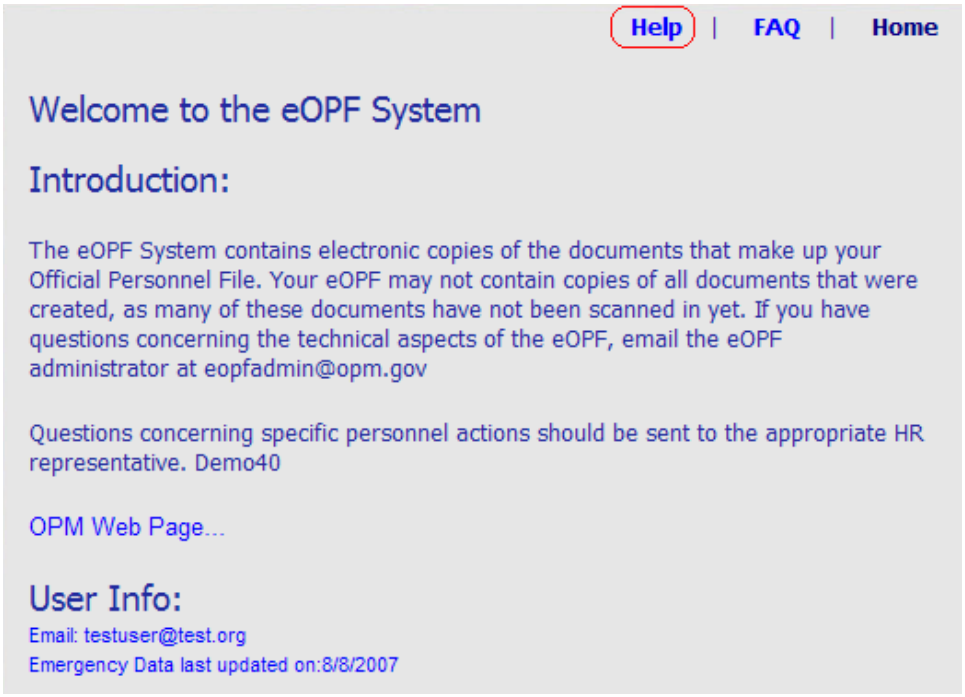
6. **If you do not want to save the changes, click the**

Cancel **button.**

Accessing Online Help

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

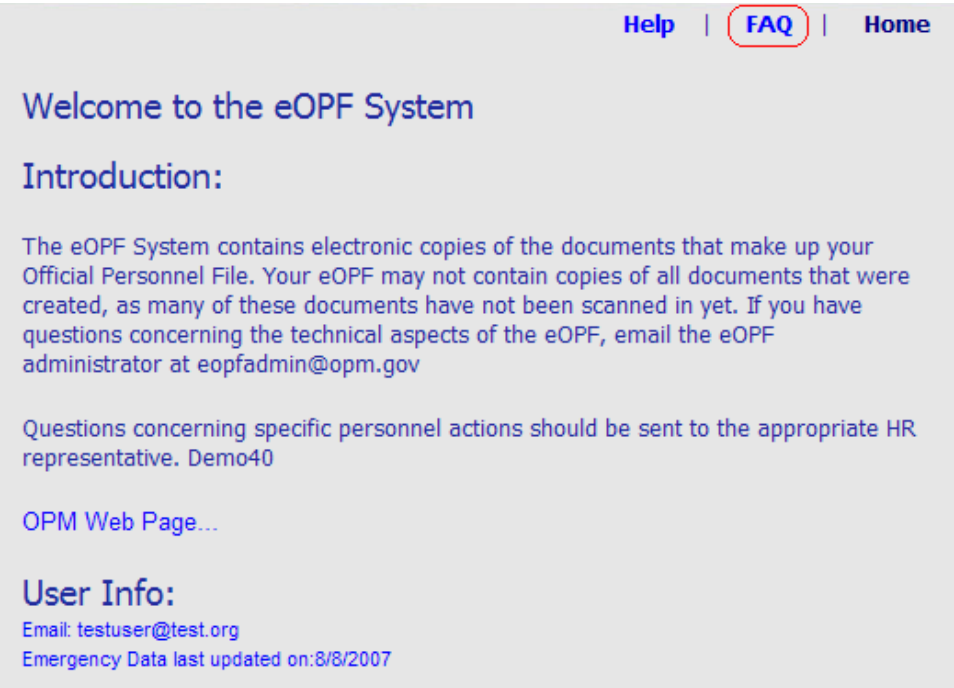
The following figure shows the *eOPF Welcome* page with the *Help* link circled.



Accessing Frequently Asked Questions

The eOPF provides access to a *Frequently Asked Questions* (*FAQ*) page. The *FAQ* page can be accessed by clicking 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.

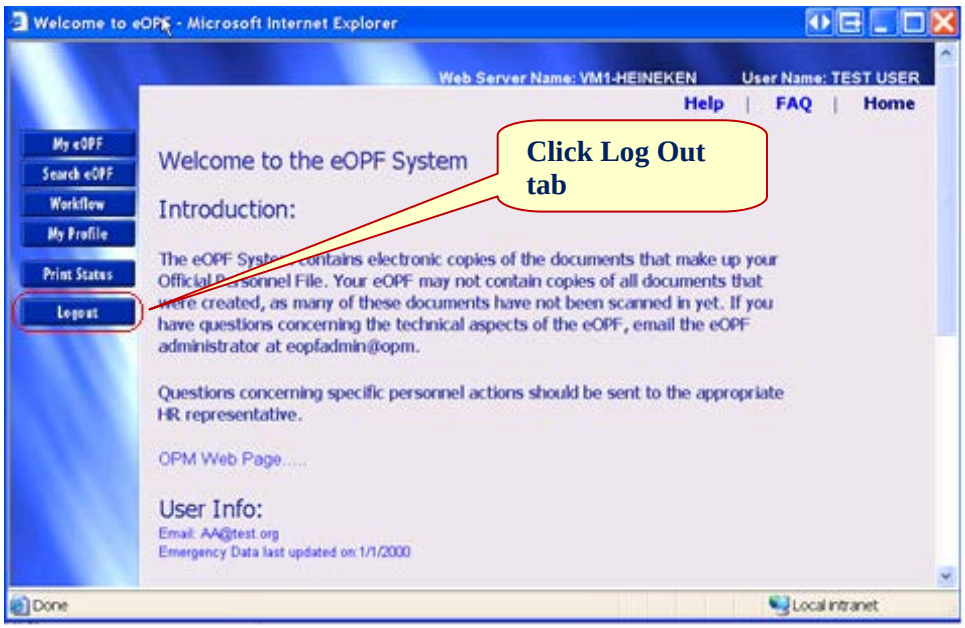
Logging out of eOPF

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.)

Note:
Attempting to close the browser using the "X" button in the upper-right corner will display a pop-up asking if you want to exit out of eOPF. Click the *OK* button to continue closing the browser or click the *Cancel* button to stay logged in to eOPF.

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



To Log out of eOPF:

1. **Click the**

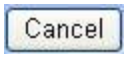
Logout **button.**
A log out confirmation page displays.

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 to 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 ten 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.

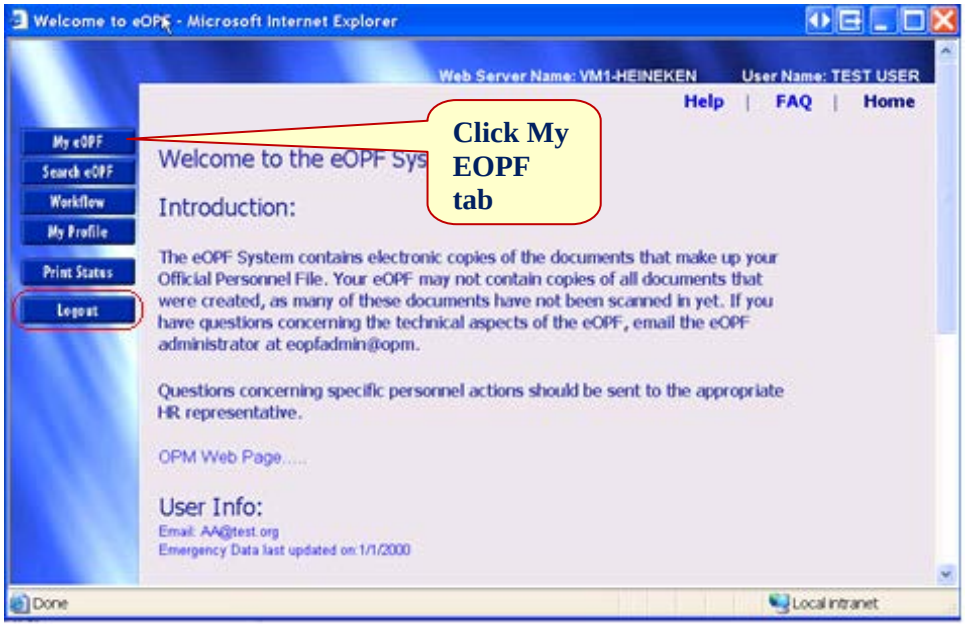
The eOPF v4 release added a watermark identifying the document as coming from eOPF. This watermark is automatically added to the document when accessing the document using the *Show All Docs* feature. The eOPF v4.1 release added the ability for a user to view a single document with a watermark. To view a single document with a watermark, use the *With Watermark* option from the *View* drop-down within Search Results.

Viewing Your eOPF Documents

Release E1 has consolidated the *My eOPF and Search eOPF* functions into one button – *My eOPF.* Once logged on to the eOPF system, you can click the *My eOPF* button to access your OPF information. The page will default to the *My eOPF* tab, and you see a listing of all documents stored in your eOPF listed by effective date of the document. If you click the *My eOPF Search* tab, you see a filtering page to search for and list specific documents within your eOPF. You can also print one or more documents.

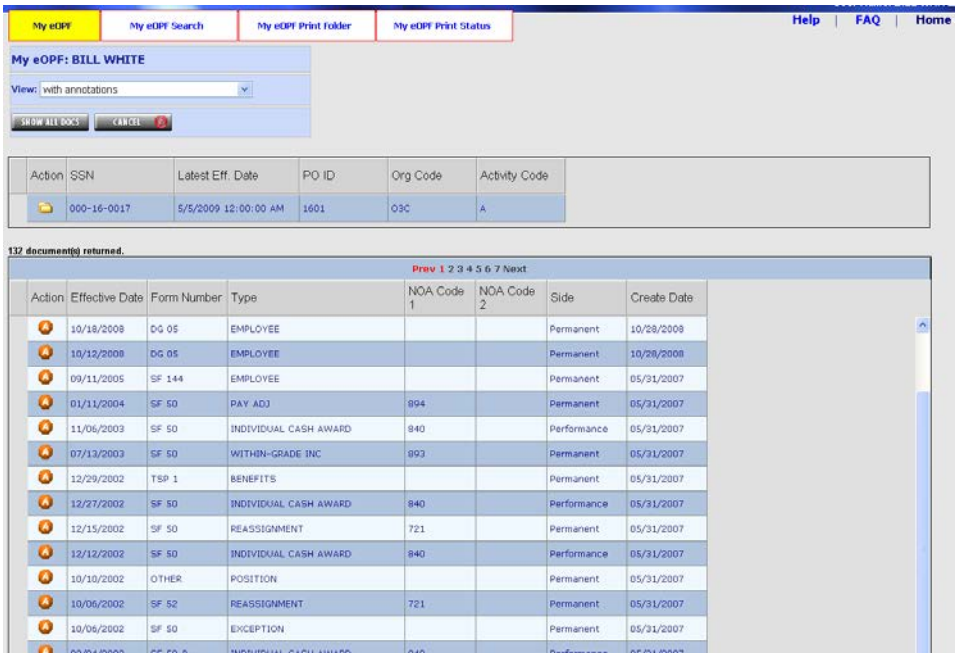
Viewing Your eOPF

To view all contents of your eOPF in order by effective date of the documents, click o *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 is 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.

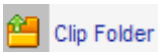


From the *My eOPF Results* page, you can access folder actions by clicking the *Folder* icon :

Open your eOPF,

Access *Show All Docs* page and features,

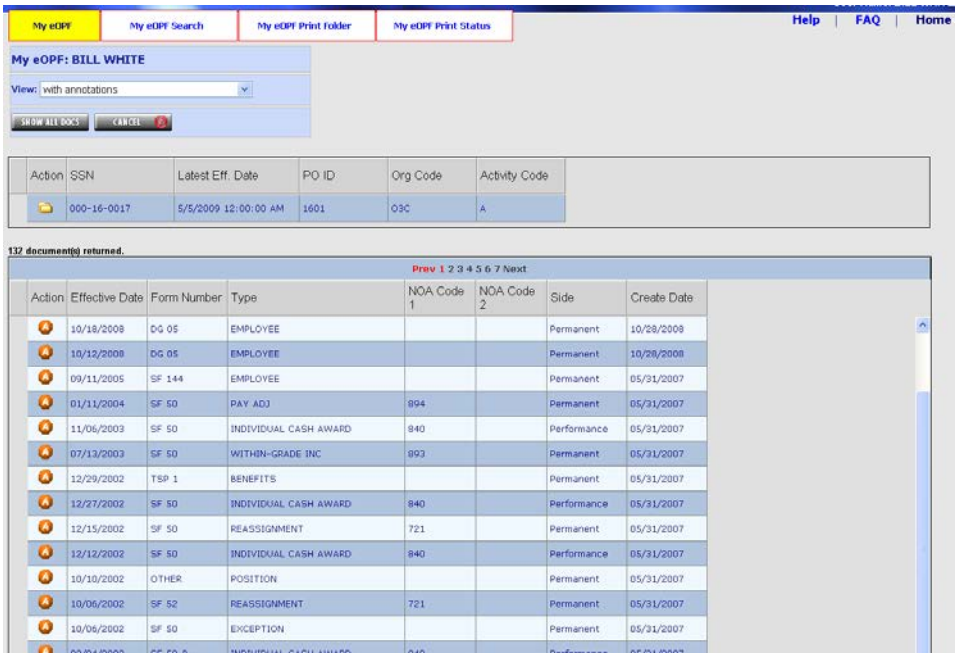
Access your emergency contact info, or



Access clip folders associated with your eOPF.

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, mark up, 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 finish, 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 *My eOPF Search* tab from within the My eOPF page to display the *Search* page.

From within the *Search* tab, 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:
It is 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, select *All Forms*.

This figure displays the *Search* tab.

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

1. **Click the *My eOPF* button on the eOPF main menu to open the *My eOPF* page, then click the *My eOPF Search* tab at the top of the 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, select *All Forms*.

---

3. **To retrieve all of your documents, click the SEARCH *Search* button.**
   Because of the size of the *Search* tab, the action buttons have been placed 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 *My eOPF Search Results* page.

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

4. **Click the** SHOW ALL DOCS ***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* tab 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 finish, 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.)

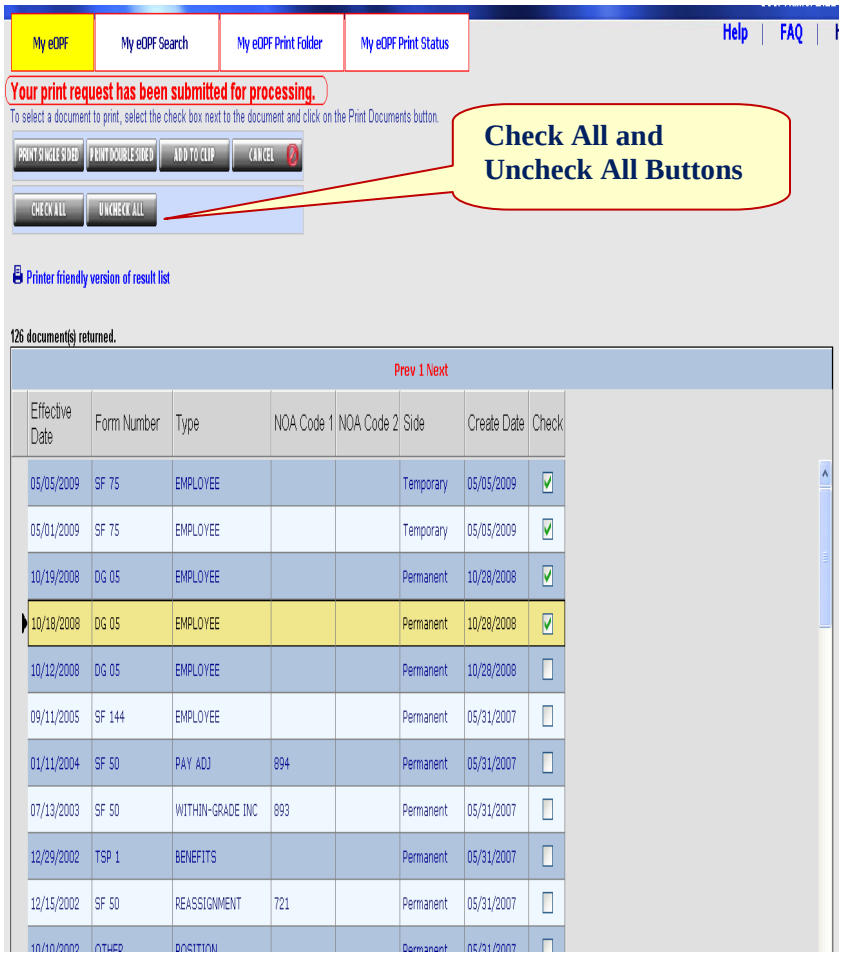
Note:

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 with the print request confirmation.



Note:

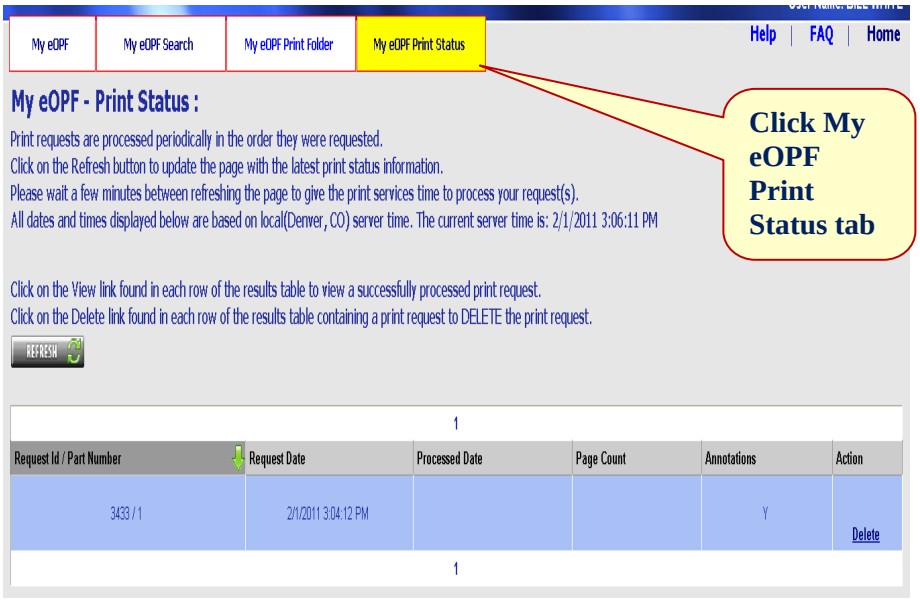
You must have access to a duplex printer for double-sided printing.

3. **To see the status of your print request, click the**

My eOPF Print Status **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

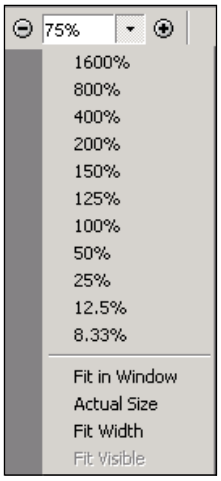
Once you open a document, you may need to change the way it appears on your screen. Perhaps you need to change the size to fit in your monitor or you would like to Z*oom In* to view details. The following steps demonstrate how to use the Adobe Acrobat document viewer.

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.



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

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

Instruction Page icon is enabled on the *Action* menu.

To View Document Instruction Pages:

1. **Click *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. **Click the *Action* icon next to the corresponding document you want to view and select the**

***Instruction Page* 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 finish, 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. New in eOPF E1 you can now print your entire folder.

Printing an eOPF Document Using *My eOPF*

To Print an eOPF Document:

1. Click *My eOPF* to show your folder, then search for and locate the desired eOPF document to print.

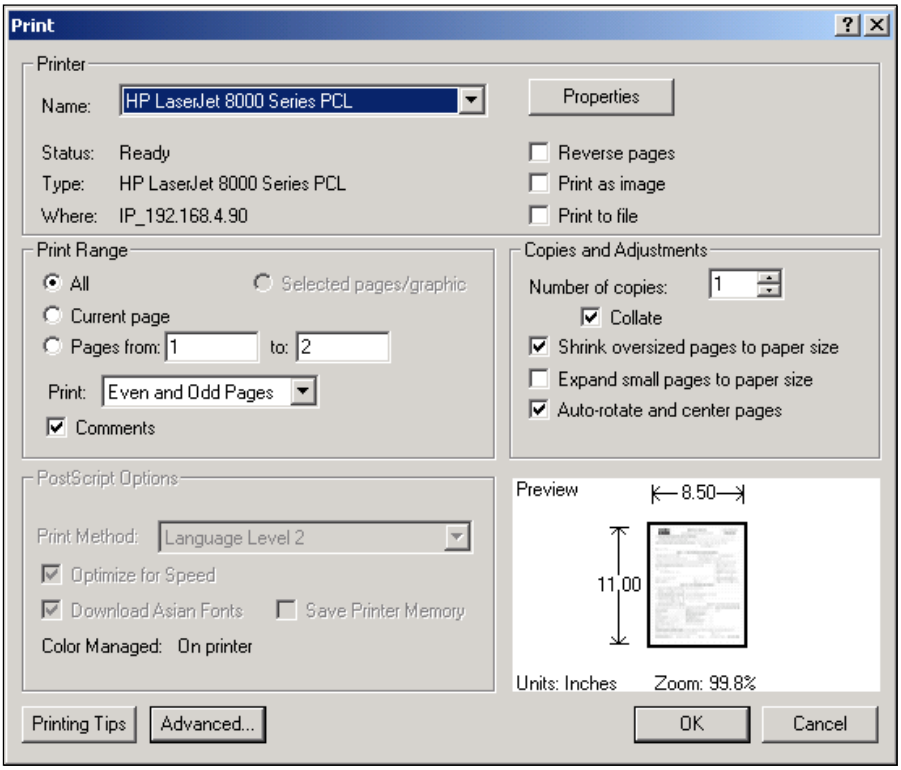
2. **Click the *Action* button of the corresponding document you want to view and select the *View* option.**
   Do not forget to set your desired annotation setting. The default setting for printing annotations is *Print All Annotations*.

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 the *Print* button, or select *File, Print,* from the viewer window menu.
   The *Print* dialog box opens. Ensure that your printer settings are correct.

The following figure displays the *Print Dialog* window.



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

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

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

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

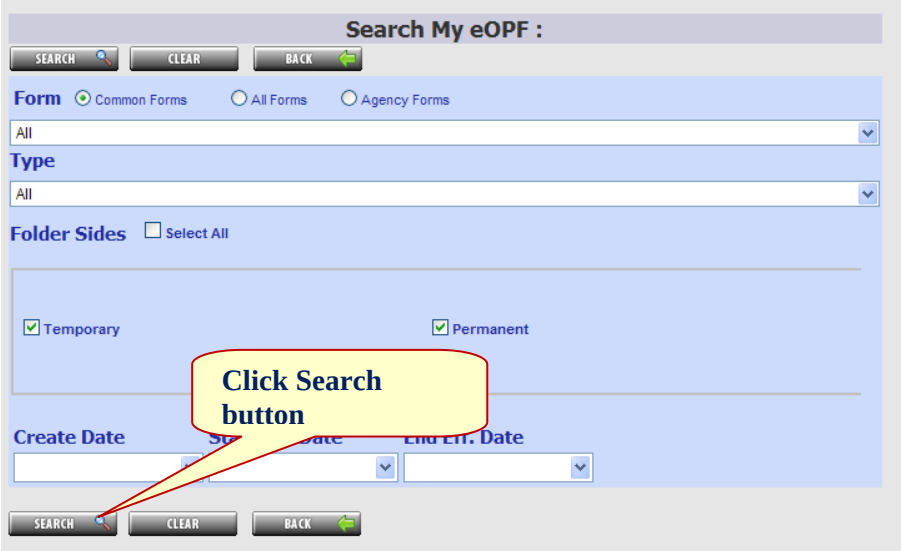
Printing an Entire eOPF or a Subset of Documents Using *Search eOPF*

eOPF produces a Results List matching documents based on 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 *My eOPF Search* tab from within the *My eOPF page*.**
   The *My eOPF Search* page displays.

   This figure displays the *My eOPF Search* page.



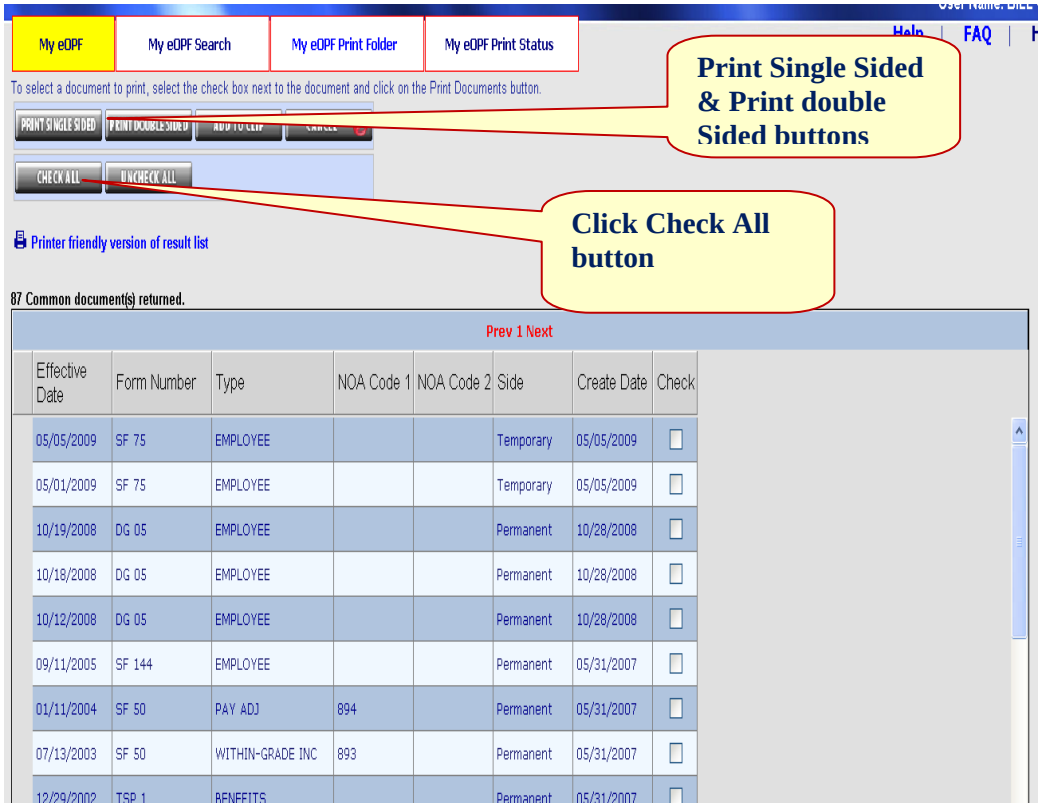
2. **Enter search criteria to narrow the list of desired documents and click the SEARCH *Search* button.**

   -OR-

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

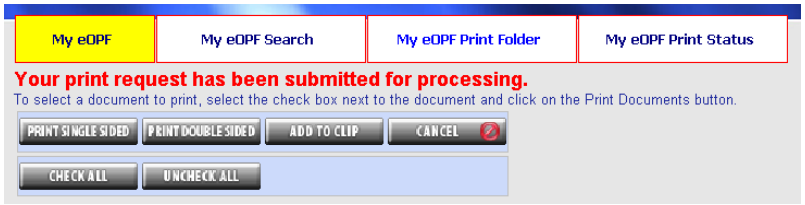
3. **From the *Search Results* page, click the SHOW ALL DOCS *Show All Docs* button.**
   The *Show All Documents* page appears containing only the documents that meet the search criteria.

This figure displays the *Show All Documents* page.



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

5. **Click either the** ***Print Single Sided*** **or the** ***Print Double Sided*** **button located at the top of the page to submit the job for printing.**
This figure shows the print request confirmation.

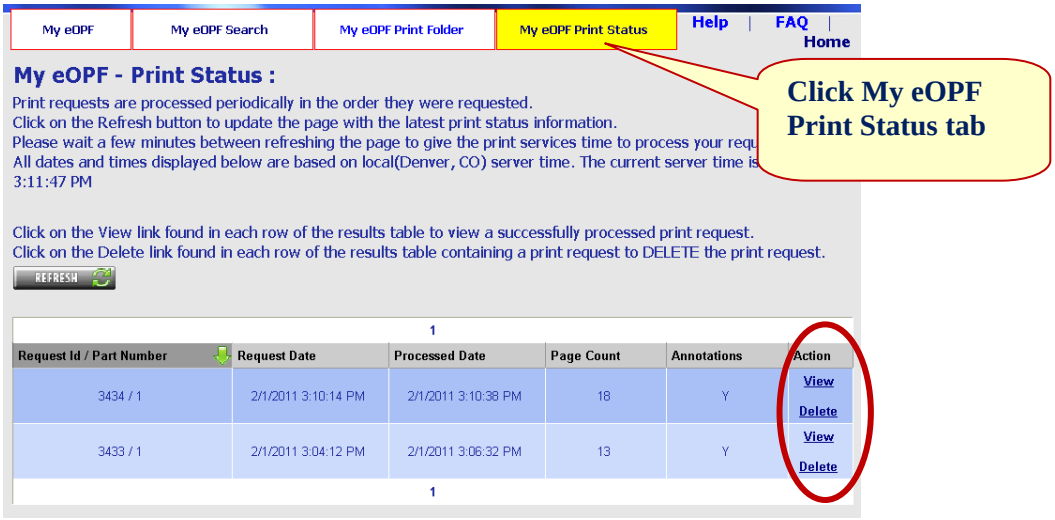


Note:
Records are printed in the order they are displayed on the page. If you have altered the default sort order, the print job is in the order it was in at the time of print request submission.

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 the**

My eOPF Print Status **tab.**

   The following figure shows the *My eOPF Print Status* page.



7. **To view the print request results, click the**

View **link.**

8. **To remove the print request that is no longer needed, click the**

Delete **link.**

Print My eOPF Folder

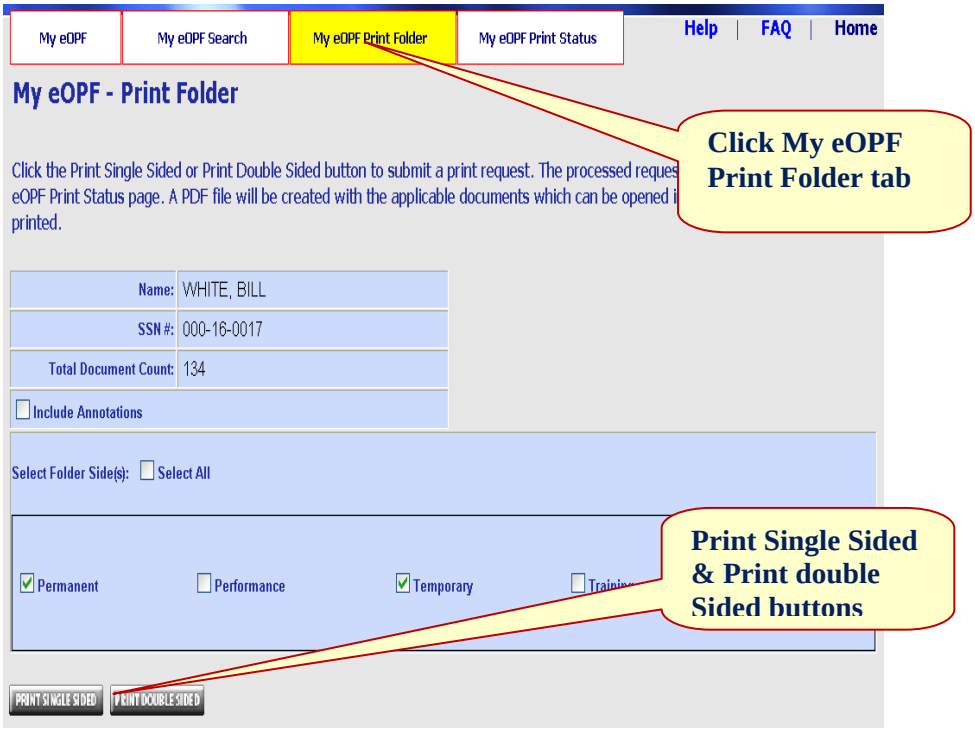
With eOPF E1 users now have the ability to print the contents of their folder. Only folder sides viewable by the user (based on their eOPF group membership) will be printed. The user will still be able to print to single or double sided output. The eOPF watermark will automatically be placed as a footer on each printed page.

To Print your eOPF Folder:

1. **Click the *My eOPF* button from the left menu.**
   The *My eOPF* page displays.

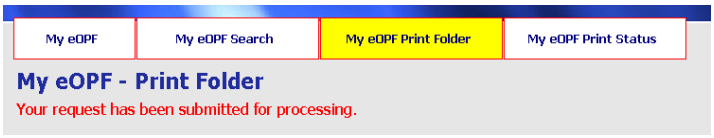
2. **Click the *My eOPF Print Folder* tab from within the *My eOPF page*.**
   The *My eOPF Print Folder* page displays.

   This figure displays the *My eOPF Print Folder* page.



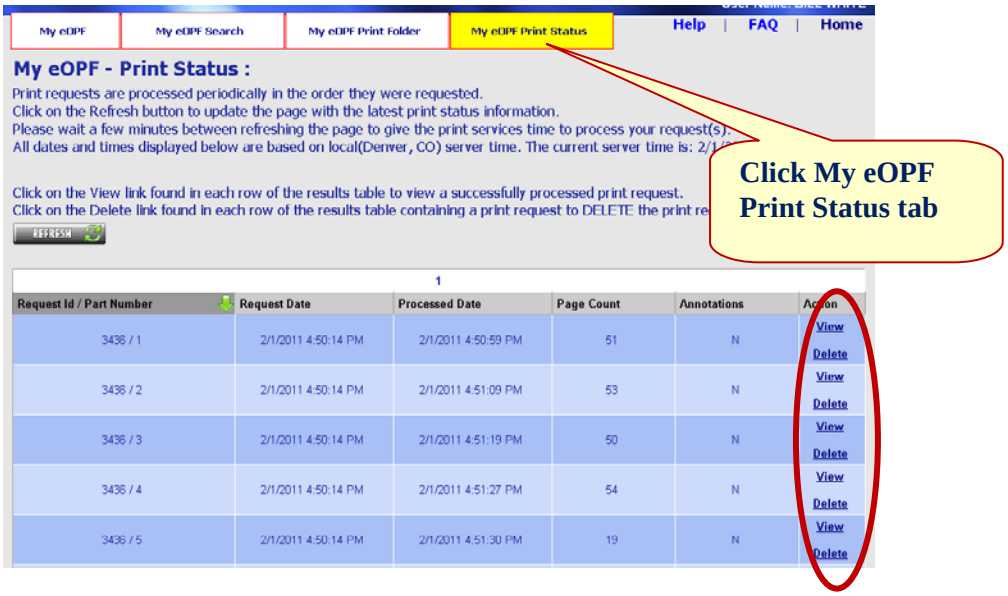
3. **Select which folder sides you would like to print and choose if you would like annotations included.**

4. **Click either the** PRINT SINGLE SIDED ***Print Single Sided*** **or the** PRINT DOUBLE SIDED ***Print Double Sided*** **button located at the bottom of the page to submit the job for printing.**
This figure shows the print request confirmation.



5. **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 the** My eOPF Print Status ***My eOPF Print Status*** **tab.**

The following figure shows the *My eOPF Print Status* page.



Note:
Depending on server settings, large jobs may be split into multiple "parts" as shown above for performance reasons.

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 2 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 (you), 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 had 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 document.

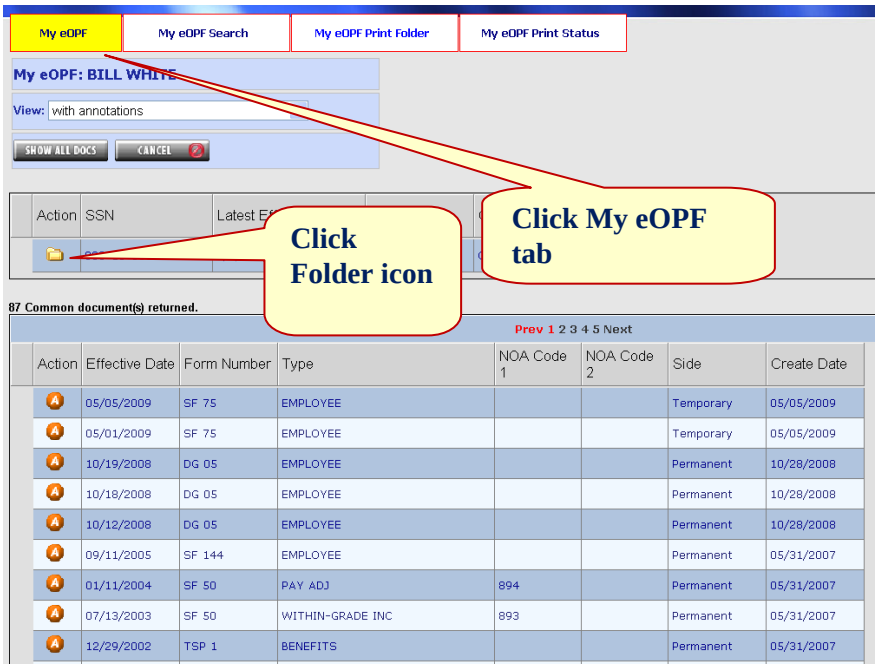
Creating a Paper Clip

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

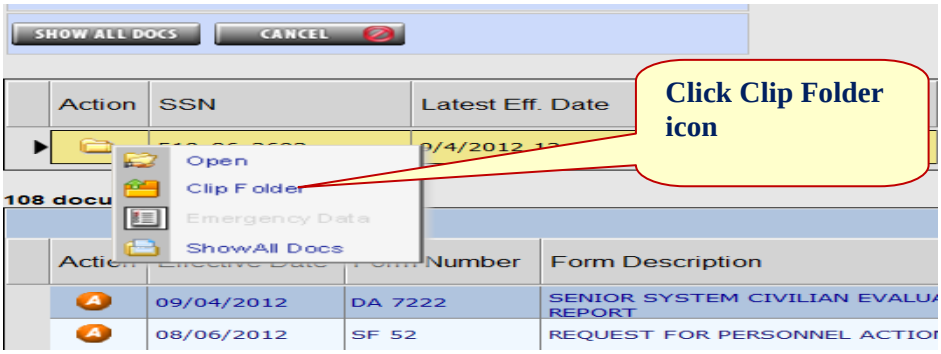
To Create a New Paper Clip for a Folder:

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

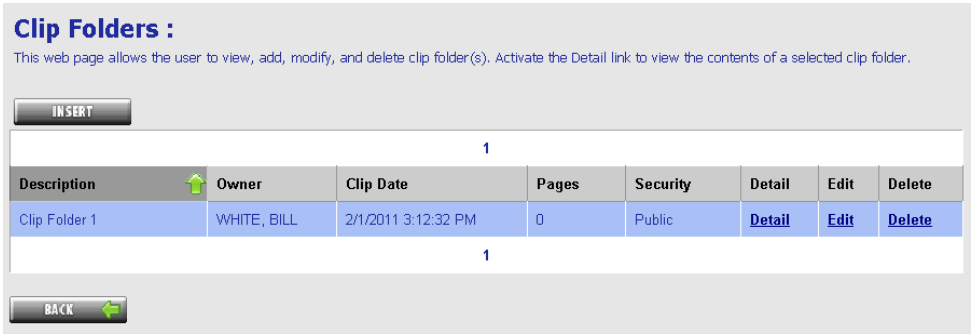
   The following figure displays the *My eOPF Results* page.



2. **Click 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. **Click the INSERT Insert button to display the *Clip Folder – Insert Clip* pop-up.**

3. **Enter a description for the paper clip in the *Clip Folder 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 2 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**

***Save* button.**

6. **Click the**

***Back* button to return to the previous page.**

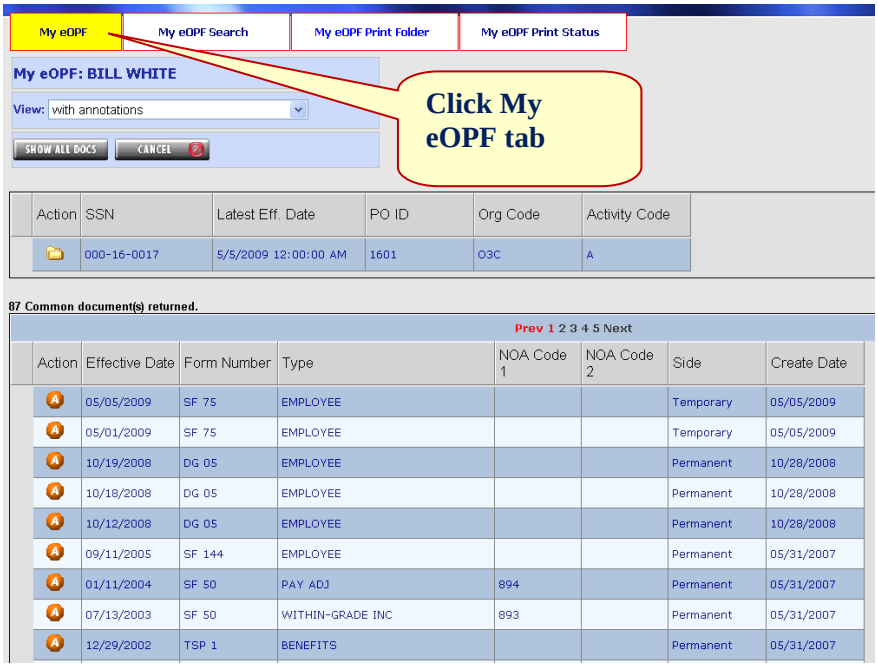
Adding Documents to a Paper Clip

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:

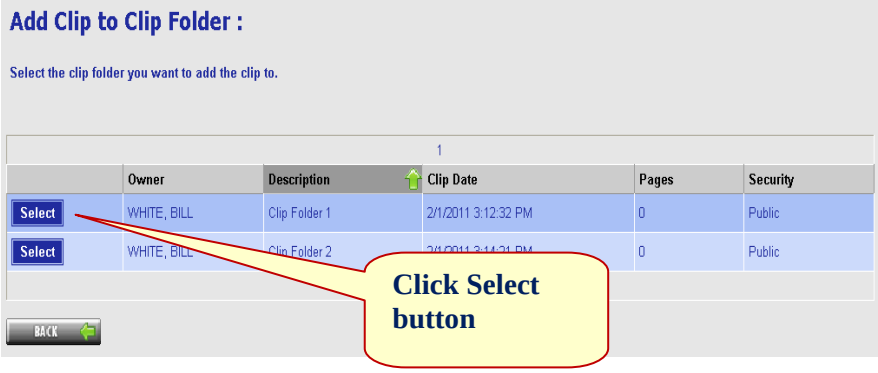
1. **Click the *My eOPF* button on the eOPF main menu.**
   The *My eOPF Results* page displays your eOPF folder and document contents.

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



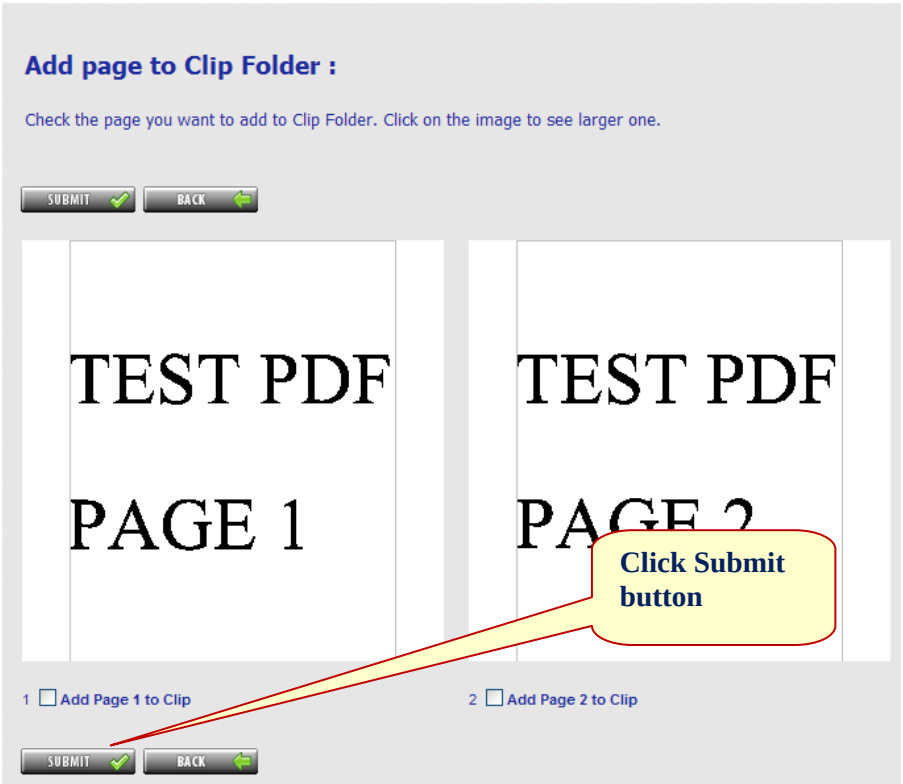
2. **On the *My eOPF Results* page, click the *Action* button of the corresponding document you want to view and select the Add to Clip *Add Clip* icon, for the document you want to place in a clip folder.**
   This opens the *Add Clip to Clip Folder* page.

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



3. **Click the Select *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.



4. **Select the additional pages you want to add to the clip, then click the SUBMIT *Submit* button.**
   The confirmation page appears.

Note:

Click the BACK *Back* button to return to the previous page.

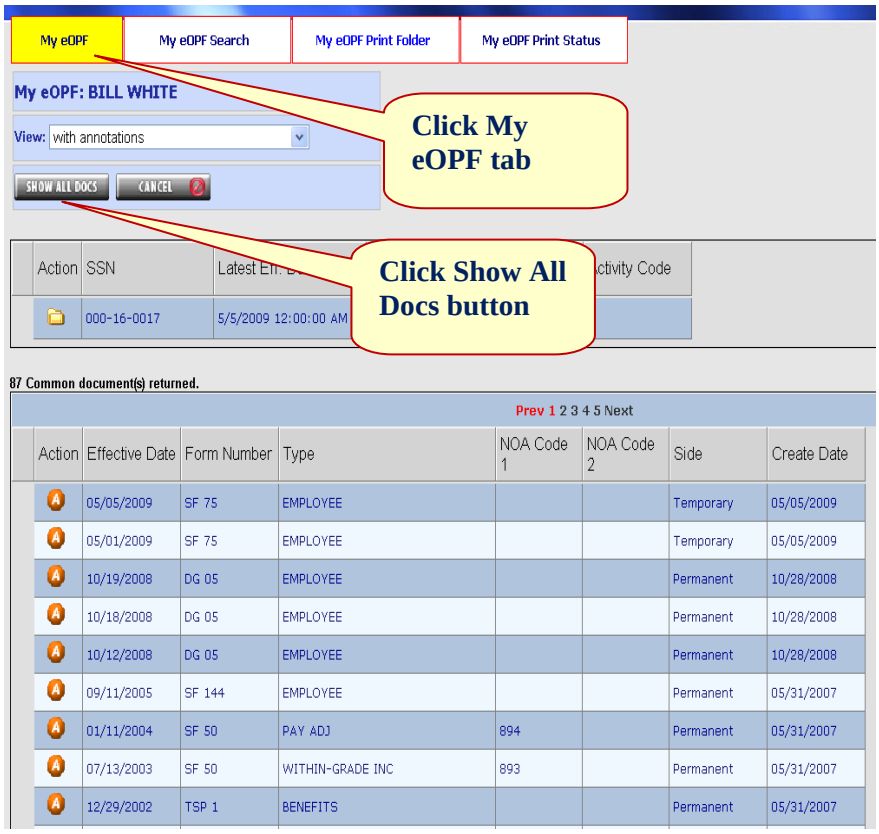
The following figure displays the confirmation message page.

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

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

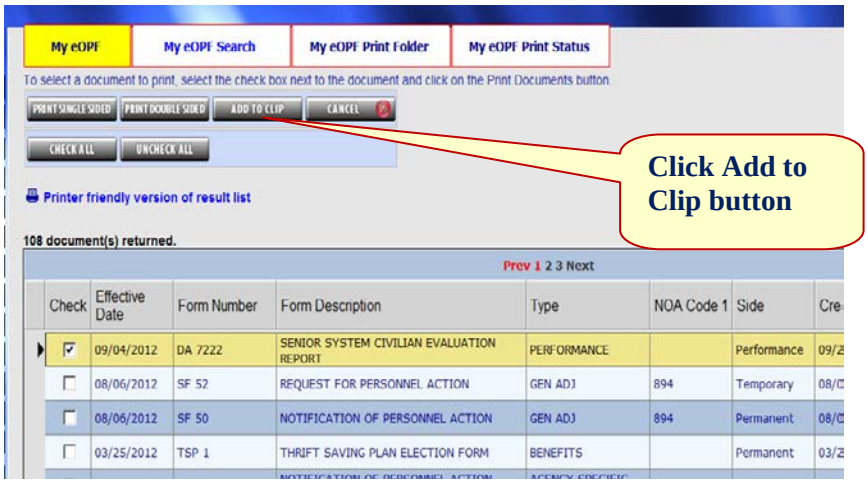
1. **Click the *My eOPF* button on the eOPF main menu.**
The *My eOPF Results* page displays your eOPF folder.

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.

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



4. Using the *Show All Docs* page, select the documents you want to add to a clip folder. Click the ADD TO CLIP *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 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 *OK* button.
The *Search Results* page reappears.

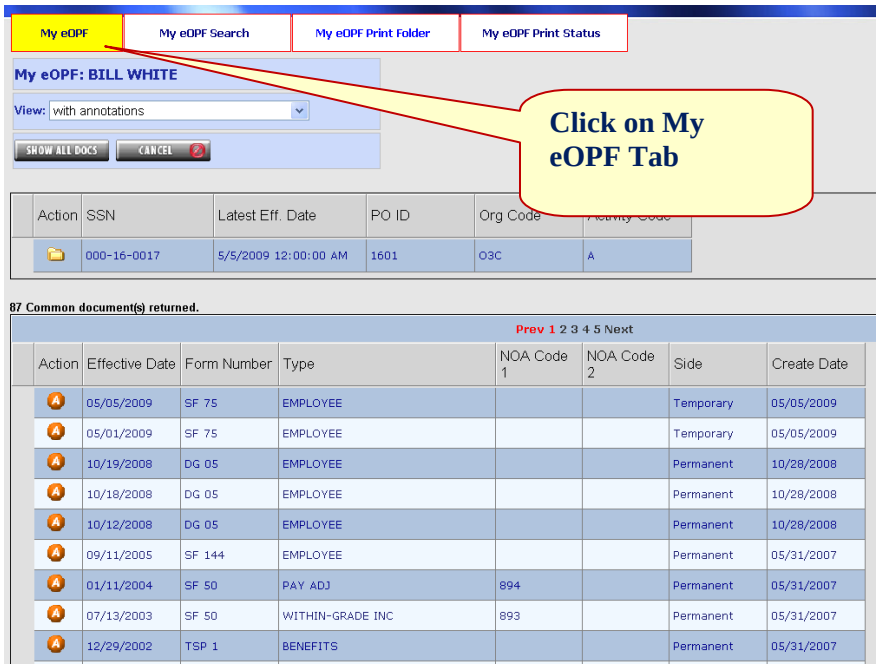
Viewing Documents within a Paper Clip

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.

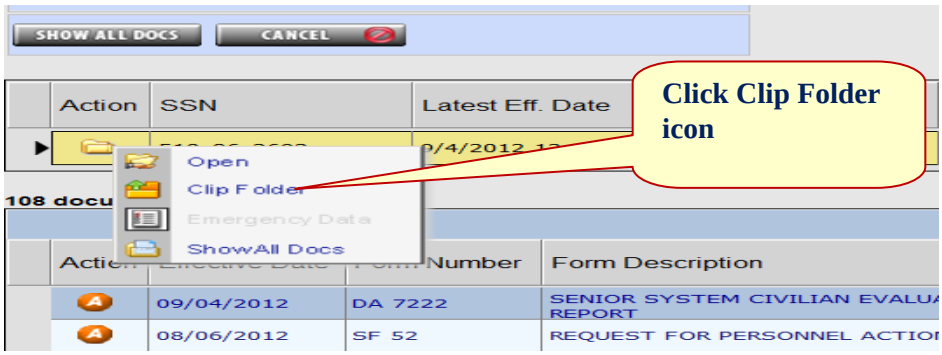
To View Documents Contained within a Paper Clip:

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

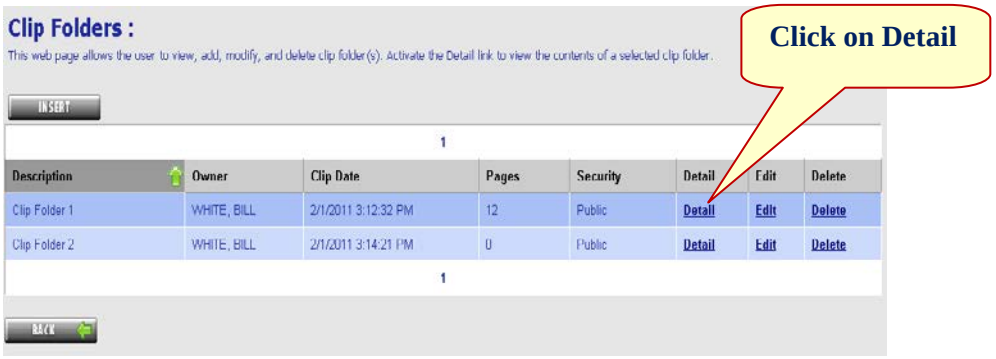
   The following figure displays the *My eOPF Results* page.



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

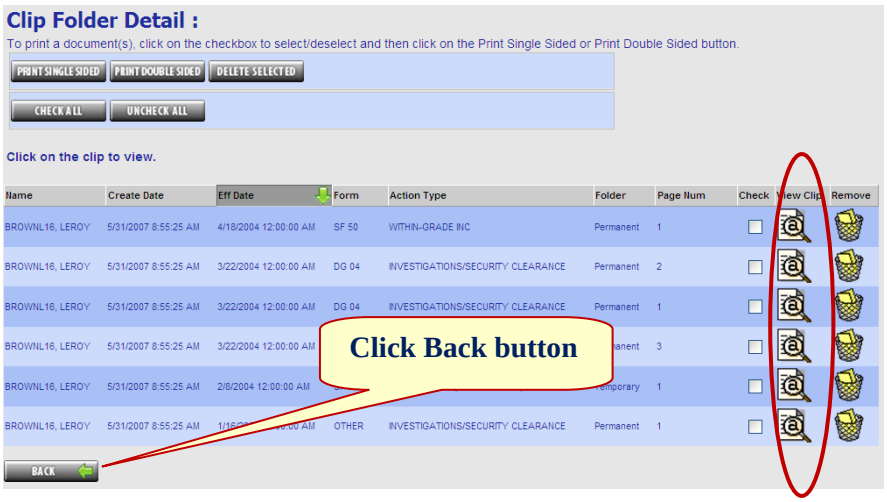


This figure displays the *Clip Folders* page.



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

This figure displays the *Clip Folder Detail* page.



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 *Back* button to return to the previous page.**

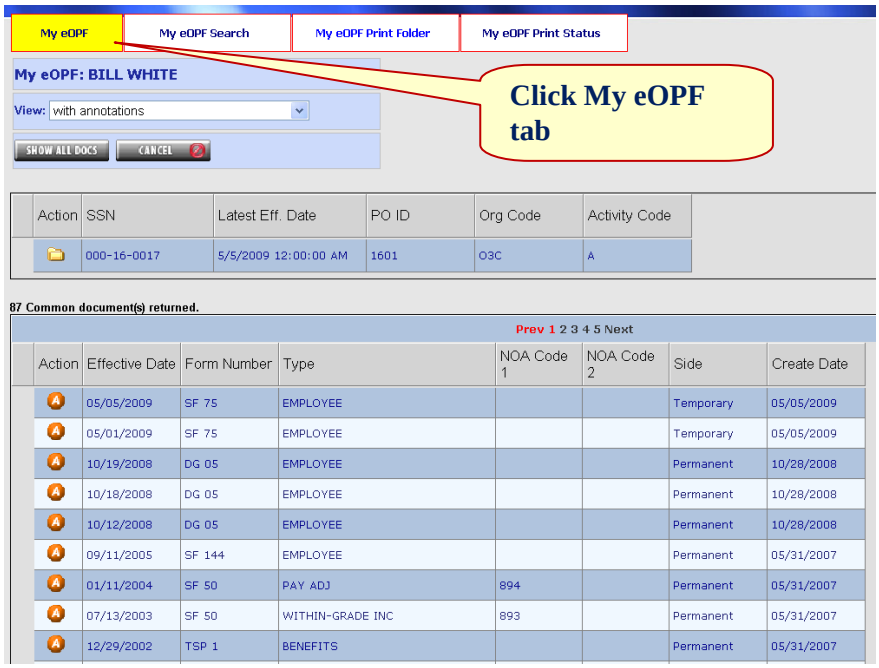
Printing Documents within a Paper Clip

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

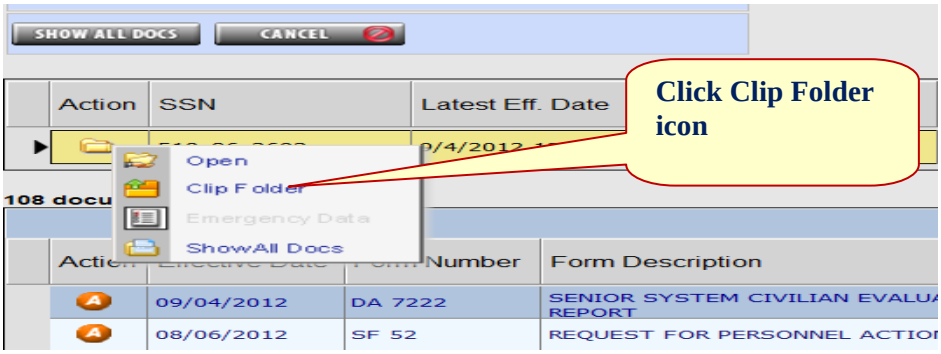
To Print Documents Contained within a Paper Clip:

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

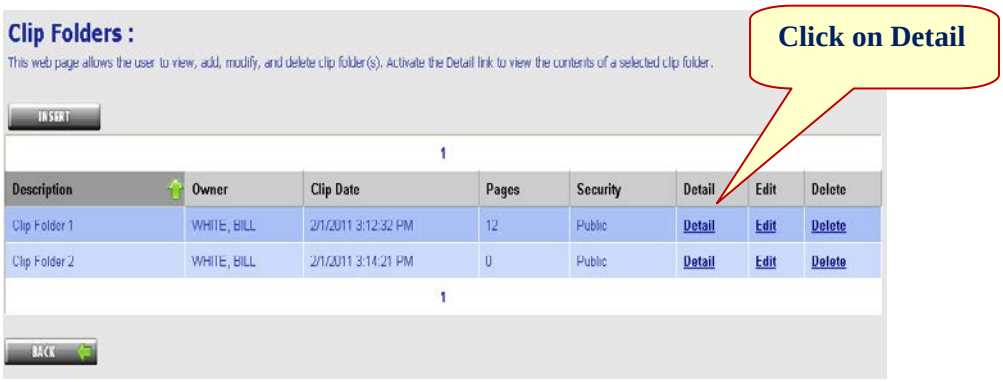
   The following figure displays the *My eOPF Results* page.



3. **Click 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 *Detail* link 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 *Check All* and UNCHECK ALL *Uncheck All* buttons to select and deselect all documents listed.

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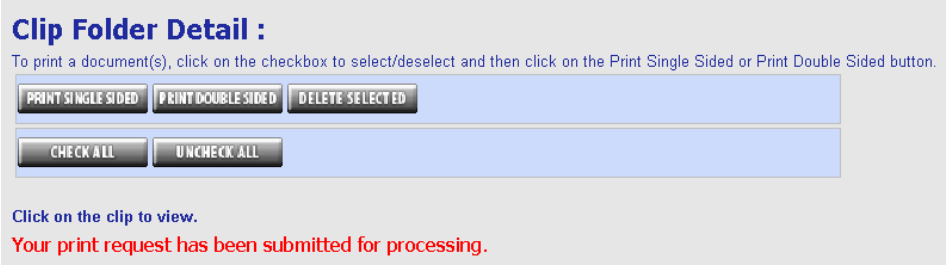
5. If the document is single-sided, click the *Print Single Sided* button. If the document is double-sided, click the *Print Doubled Sided* button.

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

The following figure displays the print request confirmation.

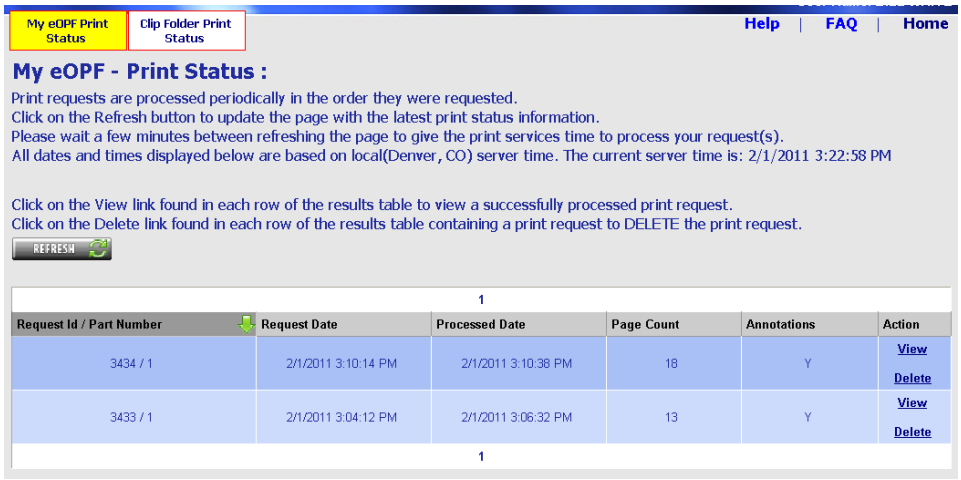


Note:
You must have access to a duplex printer for double-sided printing.

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.**

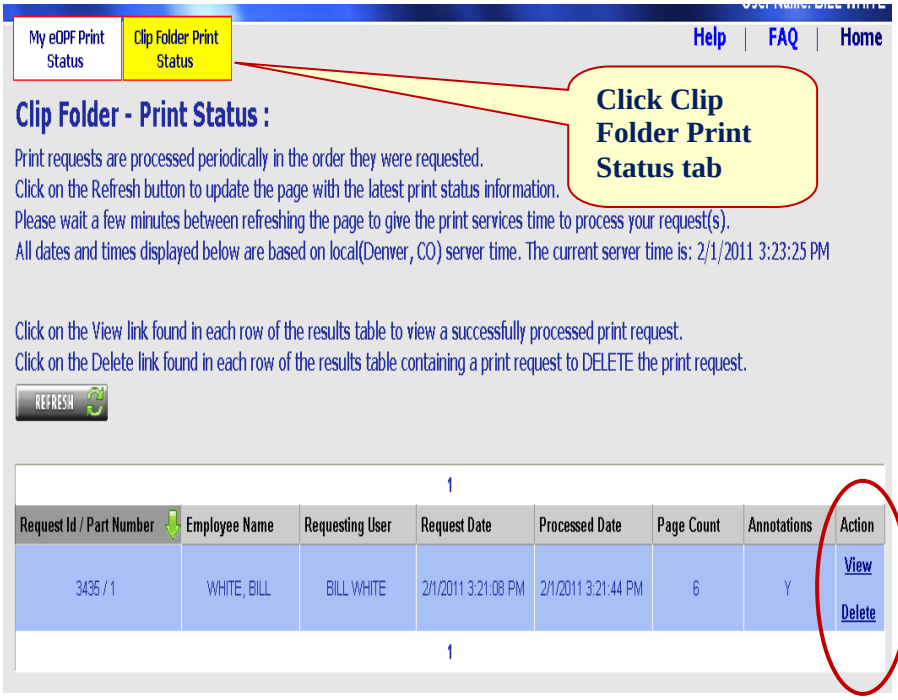
The following figure displays the *My eOPF Print Status* page.



8. **Click 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 **link.**

10. **To remove the print request that is no longer needed, click the**

Delete **link.**

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.

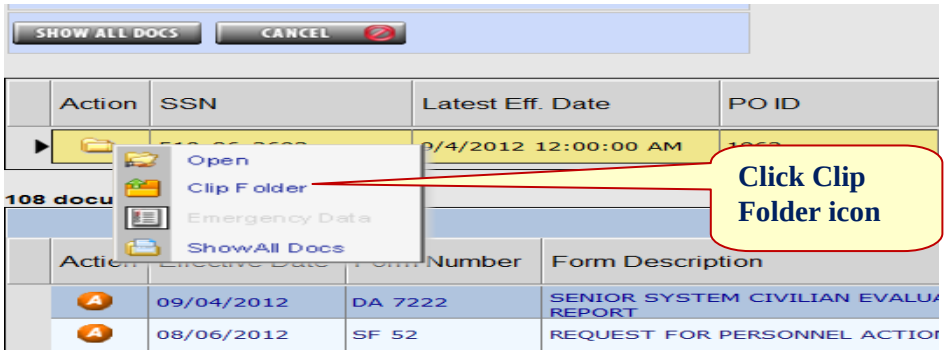
Note:
Removing a paper clip from a document does not remove the document from the system. Rather, it removes the association of the document to the other paper clipped documents.

To Remove a Document from a Paper Clip:

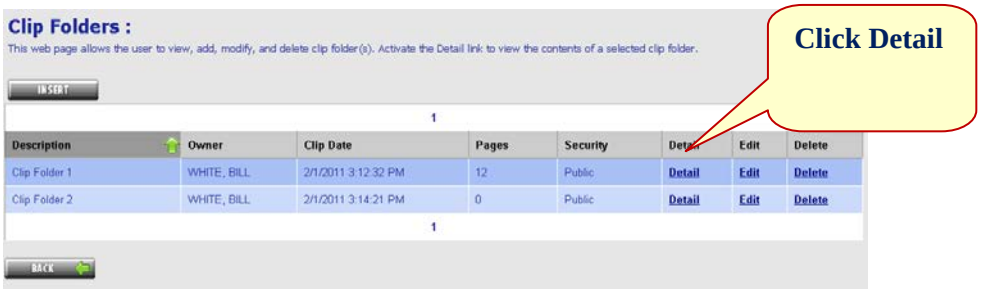
1. **Click the *My eOPF* button on the eOPF main menu.**
   The *Search Results* page displays your eOPF folder.

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

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

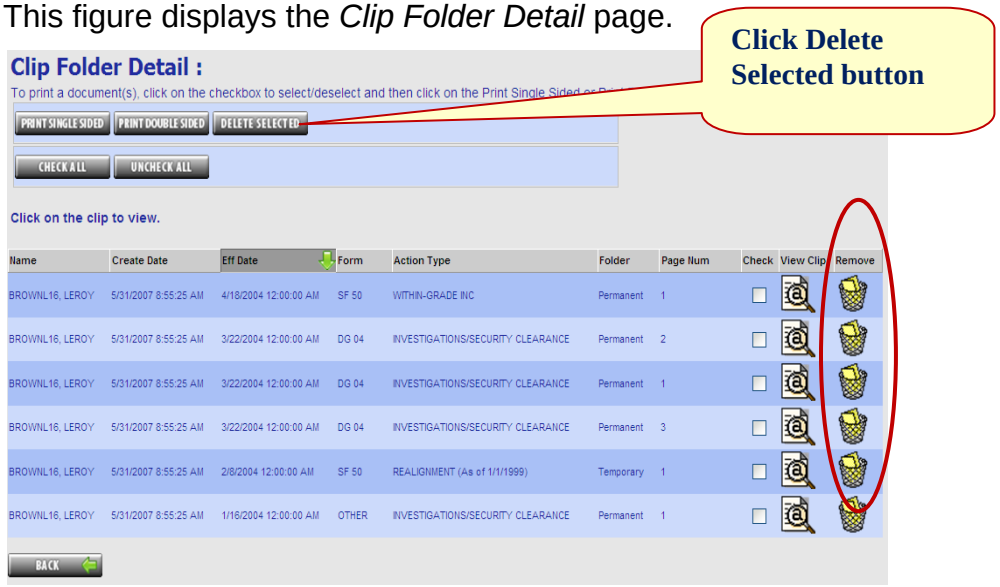


The following figure displays the *Clip Folders* page.



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

This 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 ***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.

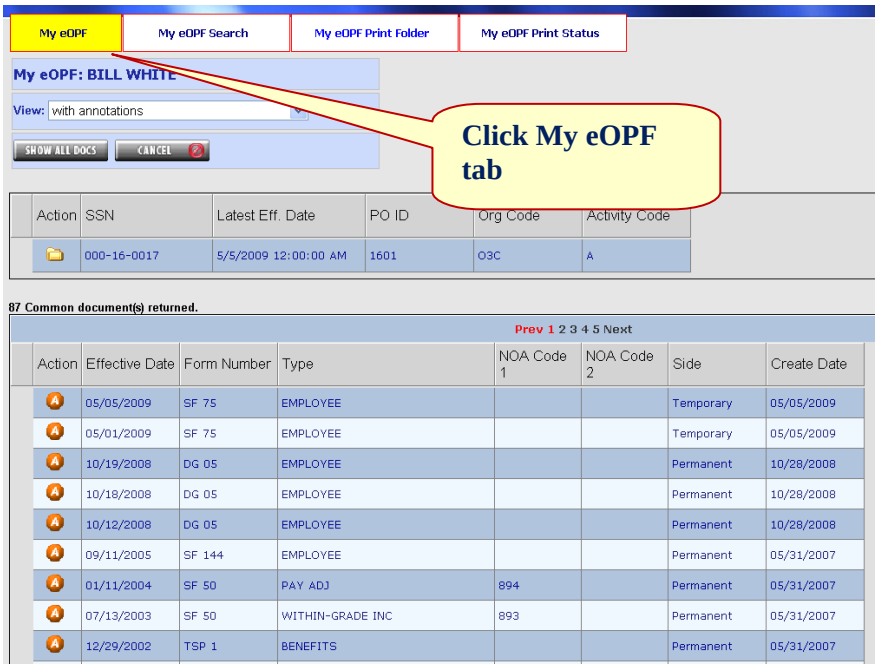
Designating a Public Paper Clip as Private and Vice Versa

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

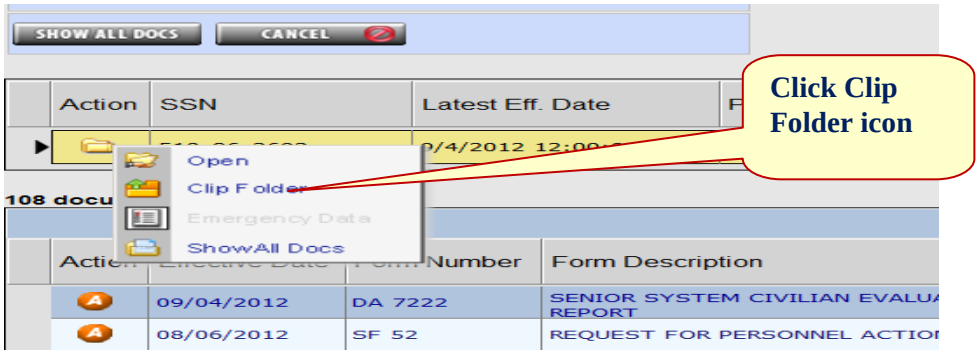
To Designate a Public Paper Clip as Private (and Vice Versa):

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

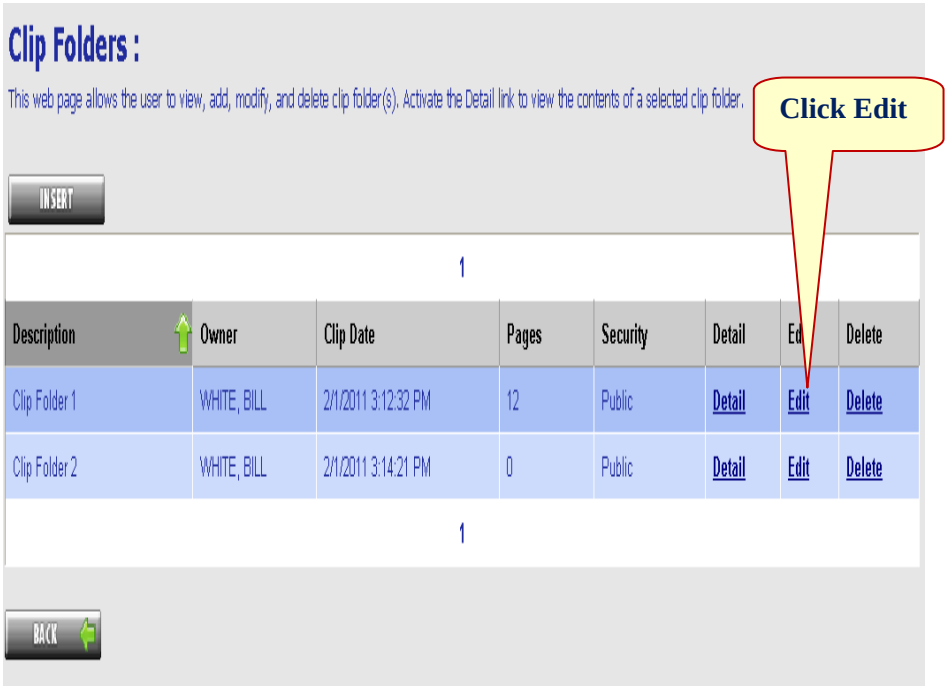
   The following figure displays the *My eOPF Results* page.



2. **Click 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. **Click the Edit *Edit* link associated with the clip folder.**

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

5. **Edit the desired fields, then click the UPDATE *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.

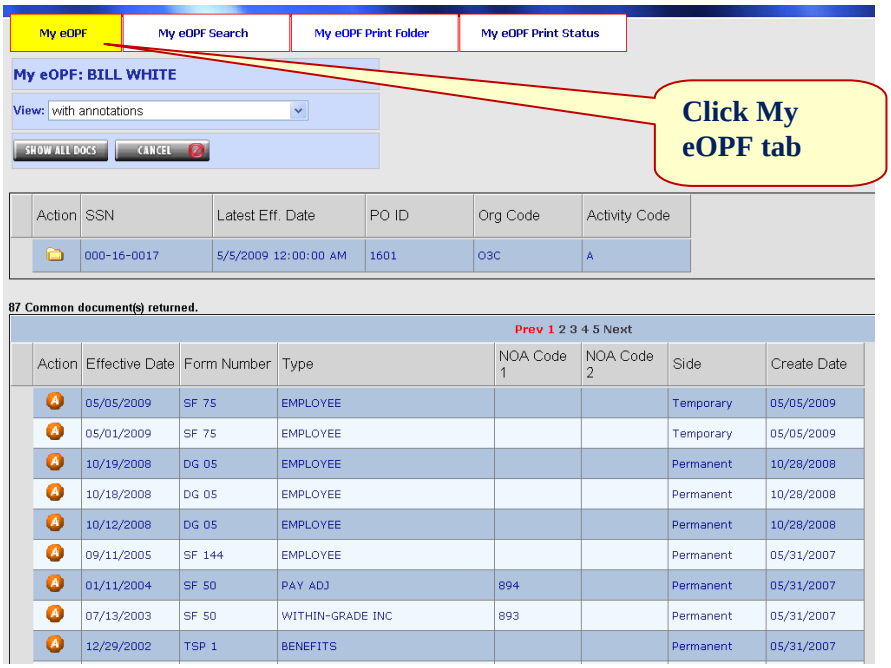
Deleting a Paper Clip

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.

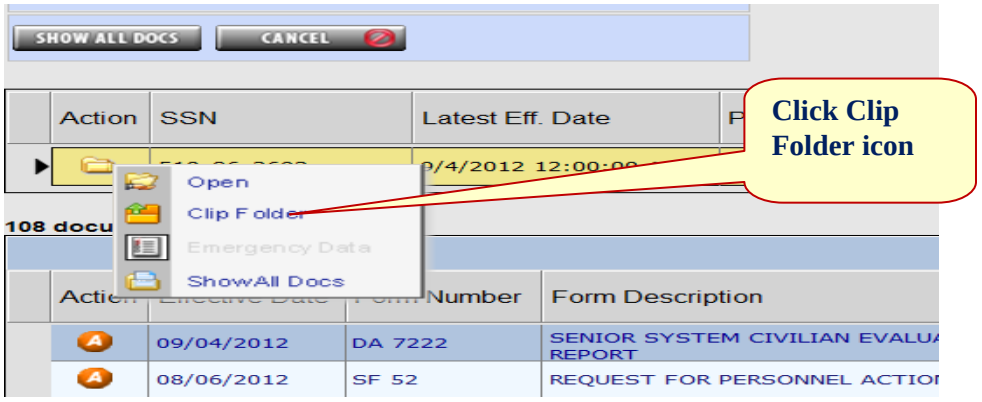
To Delete a Paper Clip Association from a Set of Documents:

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.



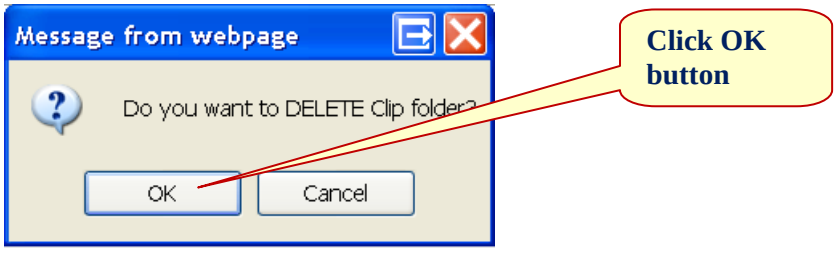
2. **Click the *Folder Action* icon and select the *Clip Folder* option to open the *Clip Folders* page of this folder.**



The following figure displays the *Clip Folders* page.

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

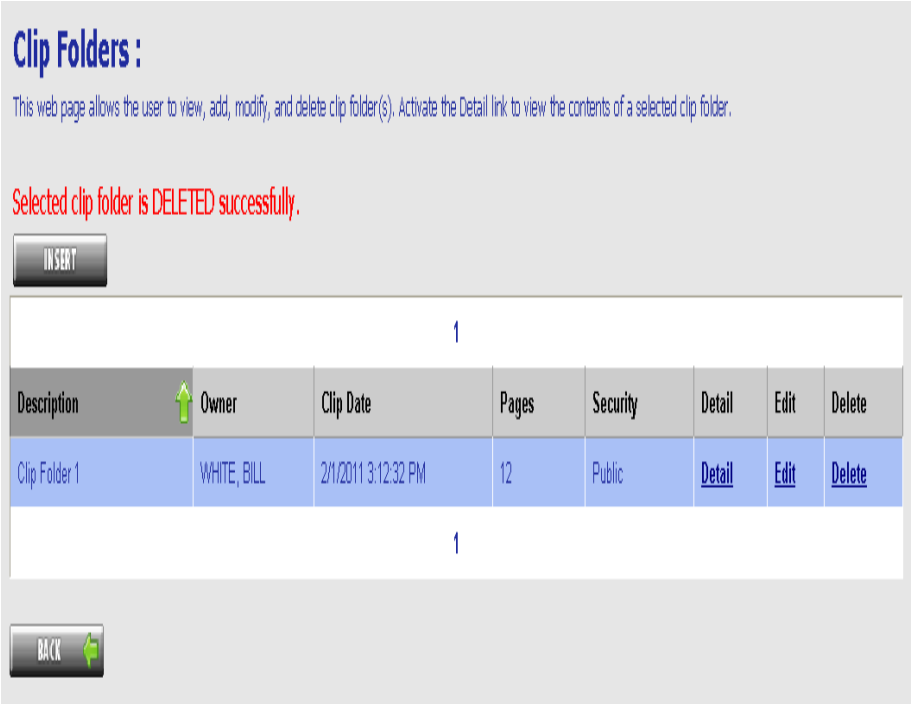
The following figure displays the *Confirmation* pop-up box.



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

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

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



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

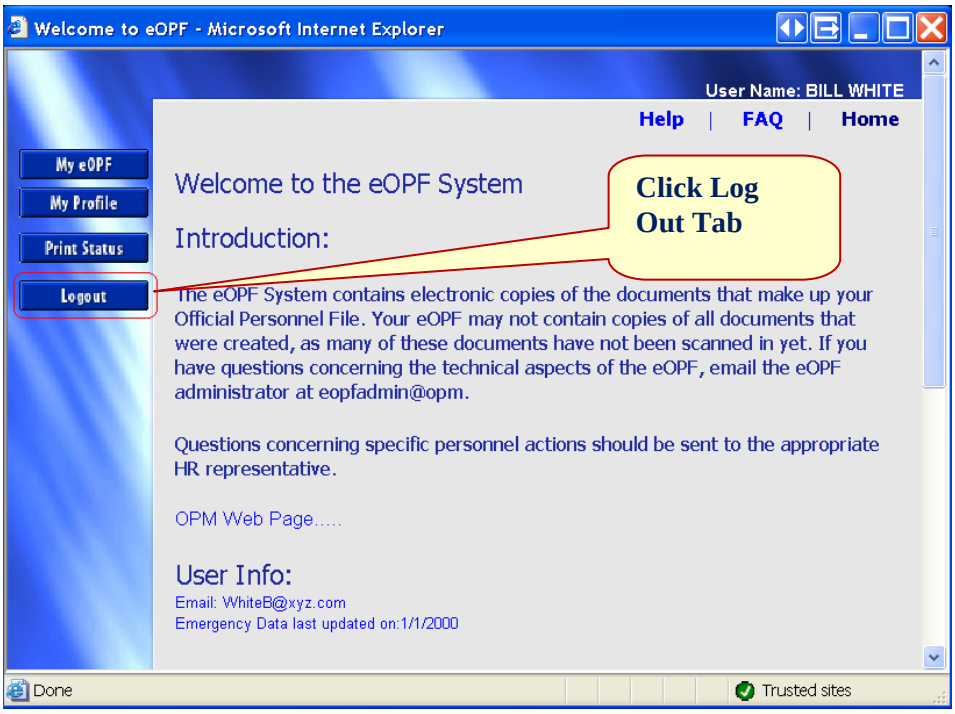
Chapter 7: Logging Out of eOPF

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.

Note:
Attempting to close the browser using the "X" button in the upper-right corner will display a pop-up asking if you want to exit out of eOPF. Click the *OK* button to continue closing the browser or click the *Cancel* button to stay logged in to eOPF.

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



To Log out of eOPF:

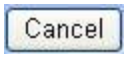
1. **Click the** ***Logout*** **button.**
   A log out confirmation prompt is displayed.

The following figure displays the log out confirmation page.

2. **Click the**

OK **button to log out and close the browser window.**

   -OR-

   Click the 

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

Glossary

Administrator	A user that has special access to setup, modify, and delete parameters within the eOPF system.
Groups	A combination of functional processes for which a user is granted access.
Folder	A container for documents.
Password	A complex sequence of characters required for access to the eOPF.
Password Letter	Notification from the agency to the employee providing the password for the eOPF.
Security Access	A level of accessibility to documents and functions within eOPF.
Supervisor	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.
View Doc	A *View* icon used to view the documents within a folder.

Acronyms

eOPF	Electronic Official Personnel Folder
NOAC	Nature of Action Code
OPF	Official Personnel Folder
OPM	Office of Personnel Management
PDF	Portable Document Format

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