

Electronic Official Personnel File (e-OPF)

Instructions to Upload and View e-OPF Documents

as of July 28, 2022

HRDoc Instructions (to upload OPF documents to SAP)

All agency HR offices are required to create and/or maintain an electronic official personnel file (e-OPF) for employees who separate, for employees who are newly hired, or transfers within or from an agency that has a converted e-OPF.

For employees who meet this criteria, designated HR staff/liaisons should use the following instructions to send OPF documents* to the e-OPF. Using procedures defined by your agency, user access should be controlled, and requests to add and/or remove users are to be submitted via AskHR. Files should be quality assured after uploading them into SAP. The rights to view e-OPF documents are inherited through a combination of SAP structural authorization and OPF roles which grant access to document groups.

*The document extensions currently supported and will process through HRDoc are doc, docx, htm, html, pdf, txt, xls, and xlsx.

Via Microsoft Edge or Chrome, connect to the following page (bookmark this link as a favorite for easy access):

http://edmapps.pa.gov/hrdoc

Understanding the Dashboard:

| HR Doc | = | 0 |
|--------------------|---|---|
| 💽 ^{kpham} | Dashboard | 🐞 Home 😑 Dashboard |
| Man Narigation | Batch. Progress II DocumentName II documentSize II Prefix II PeraNo. II DocumentDate II DocumentType II AccessCd II No data available in table Showing 0 to 0 of 0 entries Previous Next | Index Class Commit Prefix INTF_0855 Personnel No Crupty flow Document Type CRM # |
| | Document Viewer | |

Upload – Select documents to send into the queue.

Delete – Delete a document from the queue.

Clear – Clear the Index fields.

Commit – Save the document to send to SAP.

Prefix – Defaults to INTF_0555. This does not need to be changed.

Personnel # - The employee's 8-digit personnel number that is valid to your agency/Delivery Center.

File Type – The "e-OPF Required Document" file type being processed.

Document Date – The effective date of the document being processed. **Reminder**, the effective date <u>cannot</u> be a date prior to the employee's original hire date. It will not successfully save to SAP and will error out.

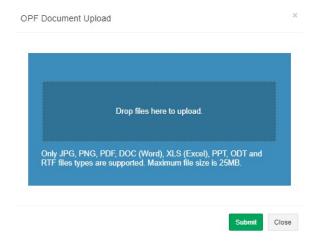
Document Viewer – A preview of the selected document in queue.

To Upload e-OPF document(s):

1. Click "Upload".



 Either select the documents and drag and drop into "Drop files here to upload." or click "Drop files here to upload." to browse for the documents from file explorer. A single document or multiple documents can be selected at this time to send into the queue. Click "Submit".



3. The selected document(s) will load into the queue. Click the checkbox to the left of the document to be processed. The document should appear in the "Document Viewer" window. Complete "Personnel No", "Document Type", "Document Date", and "CRM #", if applicable.

| Upload | Delete | | | | | | | | | | | Ind | ex ar Commit | |
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| 0 | Incomplete | Cut-Paste.doc | 41.5 K | 3 | | | | | | | | | sonnel No | |
| 0 | Incomplete | EISO_Monthly_Case_Counts_2022-04-29_19_28_33.pdf | 32,82 | B | | | | | | | | 2 | | Display Name |
| 0 | Incomplete | SN Agent Workspace Navigation Guide.pdf | 1.99 M | в | | | | | | | | Do | cument Type | |
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4. Click "Commit" to finish processing the document. If multiple files were sent to queue, continue to commit all documents from the queue by following Step 3 until it is empty.

If documents are not successfully committed or deleted prior to closing the web browser, the document(s) will remain in the queue the next time you log on.

- 5. If you are done filing the documents, you can close the web browser.
- 6. Once HRDoc commits the document(s), it is sent to an FTP site where it resides until a batch process downloads the document into SAP. It is suggested to wait an hour before attempting to view the document from within SAP (otherwise the document may not appear in SAP yet).

To Delete an e-OPF document (in queue):

1. Click the checkbox to the left of the document to be deleted from queue.

| Batch Uplead Delete | | | | | | | | | Clear Commit | | |
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| - | Incomplete | Cut-Paste.doc | 41.5 KB | | | | | | | | 1 |
| | | | | | | | | | | | |
| 0 | Incomplete | EISO_Monthly_Case_Counts_2022-04-29_19_28_33.pdf | 32.82 KB | | | | | | | | - |

2. Click 'Delete'.

HRDoc Tips and Shortcuts

- By including the personnel number or date in the file name of a document to be uploaded, each value will prepopulate in the application, provided the following formats are used:
 - When a file name contains the letter "P" (case sensitive) followed by the eight-digit personnel #, the eight digits will prepopulate into the "Personnel #" field
 - When a file name contains the letter "D" (case sensitive) followed by the eight-digit date, the formatted date will prepopulate into the "Document Date" field
 - The expected format for the effective date is YYYYMMDD

Example: A file can be named either 'P00123456_EPR_D20211231.pdf' or 'D20211231_P00123456_TEST_EPR.pdf' – the order of personnel number and date in the file name does not matter, nor do other characters in the file name. Once the file is uploaded to HRDoc, the "Personnel #" and "Document Date" fields will already be prepopulated based on the file name. The File Type field is the only field that will need to be completed prior to committing.

Instructions to View an e-OPF Document in SAP

1. After the batch job pulls the file into SAP it can be viewed via PA20, Services for Objects.

| | Display HR Master Data | |
|-----------------|--|---|
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| 515140 | | |
| Kim Hoa Pham | | |
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| F7 Full-time 75 | Cost Center 81PYRLDFLT PAYROLL DEFAULT Active | |
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| r L | 515140 Kim Hoa Pham P Permanent F7 Full-time 75 | 515140 Kim Hoa Pham P Permanent Pers.area 81 Executive Offices F7 Full-time 75 Cost Center 81PYRLDFLT |

Click the down arrow on the Services for Object button and select "DocFinity Attachment" > "View Attachment (DocFinity)".

| Display HR Master Data 🔍 | | | |
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| xel (* () () () | View Attachment (DocFinity) | DocFinity Attachment | Exit |
| Figure 1 Kim Hoa Pham P Permanent Pers.area 81 Executive Offices | [3 | <u>C</u> reate <u>Attachment list</u> Private Note | > |
| F7 Full-time 75 Cost Center 81PYRLDFLT PAYROLL DEFAULT rsonal data Employment data Gross payroll Net payroll 1 | Active | <u>S</u> end <u>R</u> elationships | > |
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3. The "Attachments for Document" window will open:

| | Attach | ments for Document | |
|-------------------------------------|------------------------------|--------------------|--|
| Official Personnel File Attachments | | | |
| View Title (Description) | Cert Ind Effective Date Pure | ge After CRM No. | |
| CTEST DOCS - DO NOT USE | 11/17/2020 | | |
| CT TEST DOCS - DO NOT USE | 10/21/2020 | TEST2.pd | |
| CT TEST DOCS - DO NOT USE | 03/09/2018 | | |
| CT TEST DOCS - DO NOT USE | 02/23/2017 | | |
| CT TEST DOCS - DO NOT USE | 11/24/2016 | TEST2.pd | |
| CT TEST DOCS - DO NOT USE | 11/23/2016 | | |
| Q* TEST DOCS - DO NOT USE | 11/23/2016 | TEST1 pd | |
| Q* TEST DOCS - DO NOT USE | ☑ 07/29/2016 | | |
| CT TEST DOCS - DO NOT USE | 07/01/2016 | TESTING1 | |
| Q* TEST DOCS - DO NOT USE | 07/01/2016 | TESTING2 | |
| CT TEST DOCS - DO NOT USE | 06/17/2016 | | |

Certify Purge 🗑 Delete Attachment

- 4. From this window the user may:
 - a. View an individual e-OPF document by selecting the magnifying glass icon (left).
 - b. Certify a document (SAP update role required); Please refer to "Instructions to Certify Documents for ESS/SSS visibility".
 - c. Purge a document (SAP delete role required).
 - d. Delete a document (SAP delete role required).