

# Indexing ePAR Attachments Directly in OAKS

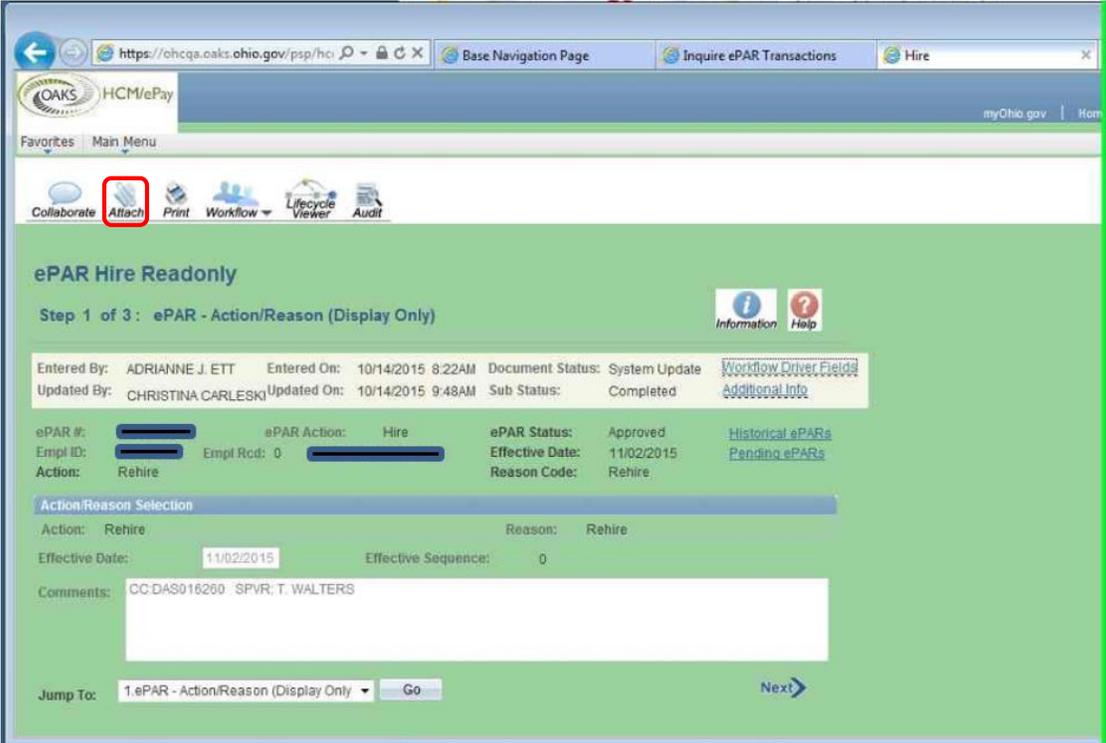
**Purpose:** This job aid details the process of indexing ePAR attachments while processing an ePAR in OAKS. ePAR attachments can be automatically indexed by performing the following steps.

## Assumptions:

1. All required ePAR attachments are saved as compatible file types and are accessible on your computer (e.g., saved to desktop, saved to hard drive).
2. The OnBase Unity Client is open and running on your computer.
3. You are using a compatible web browser (see the Troubleshooting Document for a list of compatible web browsers).
4. Your computer's function keys (i.e., F8, F10) are enabled.

## STEP 1: BEGIN PROCESSING ePAR

1. Add a new ePAR through the ePAR Request Center.
2. Enter all required fields, but DO NOT add attachments to the ePAR using .
3. Save the ePAR, then return to the request to review (do not submit the ePAR yet).



The screenshot shows the OAKS HCM/ePay interface. The browser address bar displays the URL: <https://ohcqa.oaks.ohio.gov/psp/hc>. The page title is "Base Navigation Page". The navigation bar includes "Inquire ePAR Transactions" and "Hire". The "Attach" icon in the navigation bar is highlighted with a red box. The main content area is titled "ePAR Hire Readonly" and shows "Step 1 of 3: ePAR - Action/Reason (Display Only)". The screen displays the following information:

Entered By:	ADRIANNE J. ETT	Entered On:	10/14/2015 8:22AM	Document Status:	System Update	<a href="#">Workflow Driver Fields</a>
Updated By:	CHRISTINA CARLESKI	Updated On:	10/14/2015 9:48AM	Sub Status:	Completed	<a href="#">Additional Info</a>
ePAR #:	[REDACTED]	ePAR Action:	Hire	ePAR Status:	Approved	<a href="#">Historical ePARs</a>
Empl ID:	[REDACTED]	Empl Rcd:	0	Effective Date:	11/02/2015	<a href="#">Pending ePARs</a>
Action:	Rehire	Reason Code:	Rehire			

**Action/Reason Selection**

Action:	Rehire	Reason:	Rehire
Effective Date:	11/02/2015	Effective Sequence:	0
Comments:	CC:DAS016260 SPVR: T. WALTERS		

Jump To: 1.ePAR - Action/Reason (Display Only)

## STEP 2: INDEX EPAR ATTACHMENTS

4. Open the OnBase Unity Client in a separate window (do not close the web browser with your ePAR Request).

5. Select **Upload** from the Home ribbon and drag and drop your first document to be indexed as an ePAR Attachment into the Unity Client preview pane.

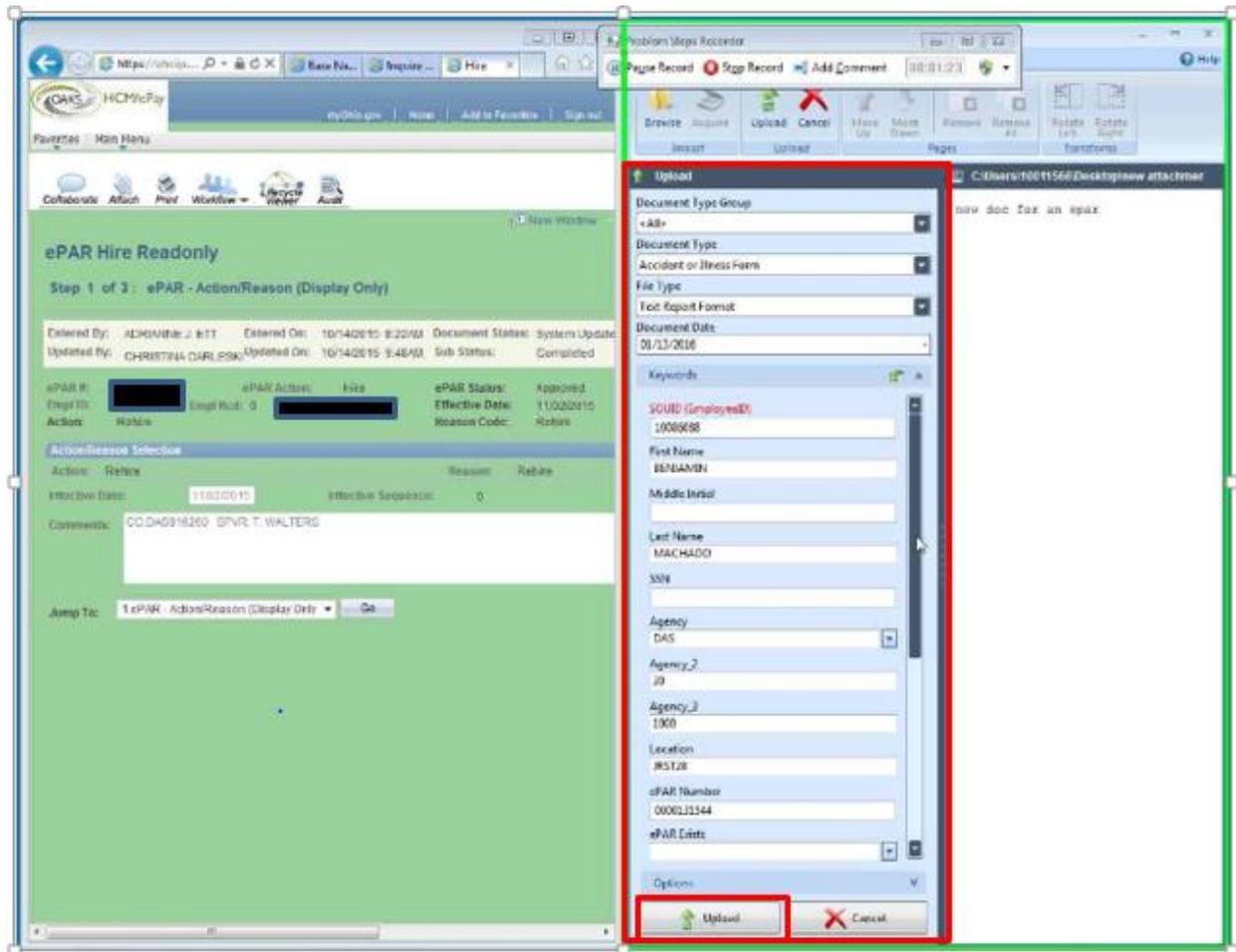


6. Return to the ePAR Request screen, then hit the **F8** button on your keyboard. The OnBase screen will appear (darkened area in the screen shot below) with a pop up window to select a Document Type for the document.

*Note: If the uploaded document is an ePAR attachment, the correct ePAR number and effective date MUST be indexed to associate the attachment(s) with the ePAR.*

The screenshot displays two overlapping windows. On the left is the 'ePAR Change Ready' screen, which shows details for an ePAR record, including the user who entered it (ADRIANNE J. ETT), the date entered (07/01/2015), and the action (Data Change). It also includes an 'Action/Reason Selection' table with columns for Action, Old Effective Date, Old Effective Sequence, Effective Date, and Effective Sequence. On the right is the OnBase 'Upload' dialog box, which is darkened. It shows the file path 'C:\Users\10011566\Desktop\new attachment for an epar.txt' and a list of document types. A pop-up window titled 'Please select a Document Type.' is open over the list, showing a scrollable list of document types, with 'Accident or Illness Form' selected.

- Once the document has been indexed with the Document Type, many (but not all) keywords will be automatically populated (see screen capture below). Keywords with **Red Font** are mandatory and must be entered before the document can be uploaded.
- Validates that all keywords are accurate (including the automatically populated keywords), then select **Upload** to upload the ePAR attachment into OnBase.



- Repeat steps 4 through 7 for any additional documents that need to be indexed as ePAR attachments.
- Once all ePAR Attachments have been indexed, return to the ePAR Request screen and hit F10. A pop-up window will appear containing a list of the document(s) you just indexed, which are now associated with that ePAR.
- Validate all content in the ePAR Request including the indexed attachments, then submit the ePAR through Workflow.