OLTL Enterprise Incident Management (EIM) Training

EIM System Changes – June 27, 2020

Document Upload

Agenda

DOCUMENT UPLOAD HIGHLIGHTS

DOCUMENT UPLOAD OVERVIEW

RESOURCES FOR ASSISTANCE

Document Upload Functionality

pennsylvania
DEPARTMENT OF HUMAN SERVICES

Users are able to upload documents into EIM.

The Document Upload functionality becomes available as soon as the Incident is created. .

All users can upload documents until the Incident Final Section is submitted. Then users may only view documents that have been updated.

After Documents are selected from your Windows Explorer, you will need to select the 'Upload' button in order to upload the Document to EIM.
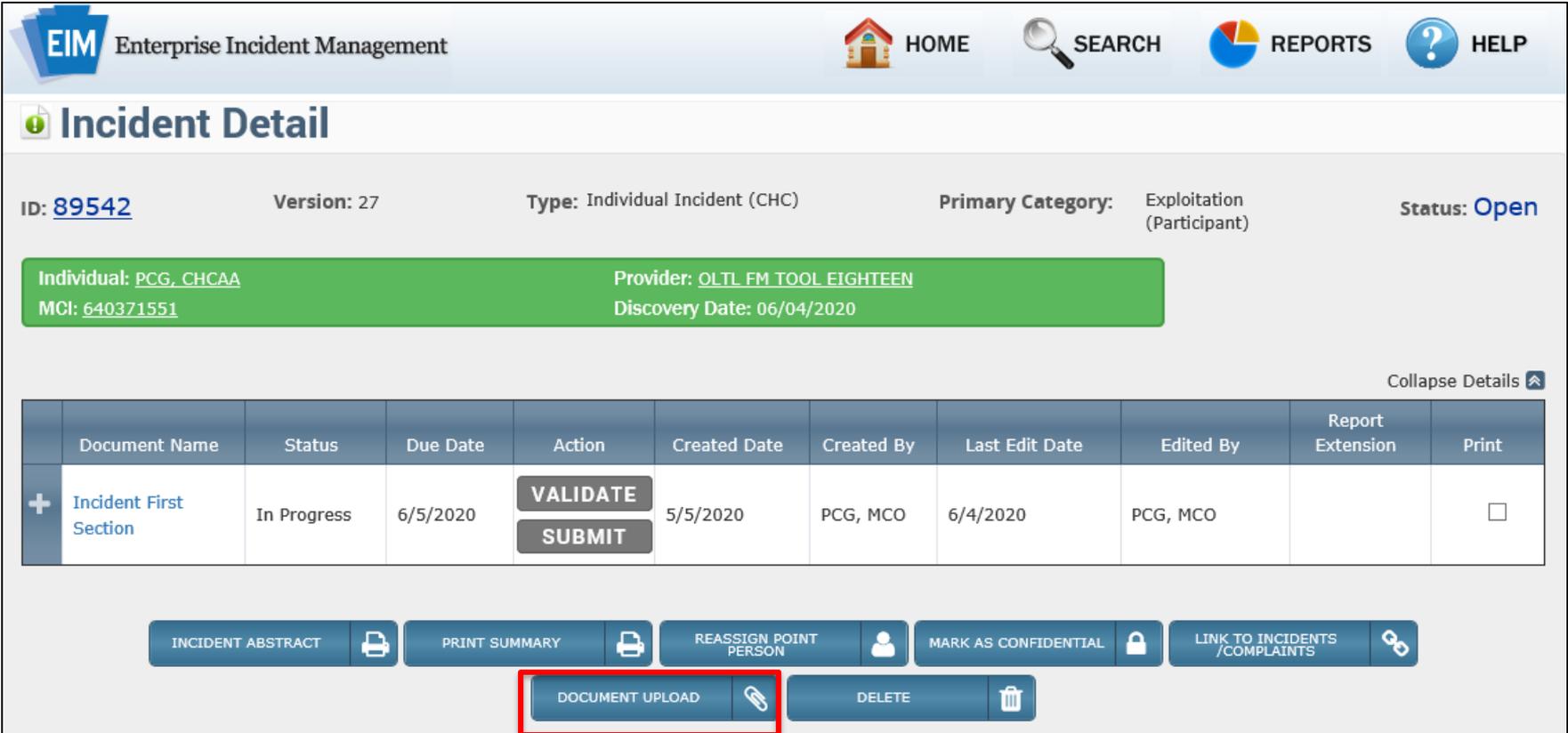
Reports or Print Summaries do not display the name of Documents that have been uploaded into EIM. You will only see those documents and the type of Document in the Document Upload screen.

Document Upload Functionality

Document Upload Functionality

The Document Upload Functionality is accessed from the Incident Detail screen.
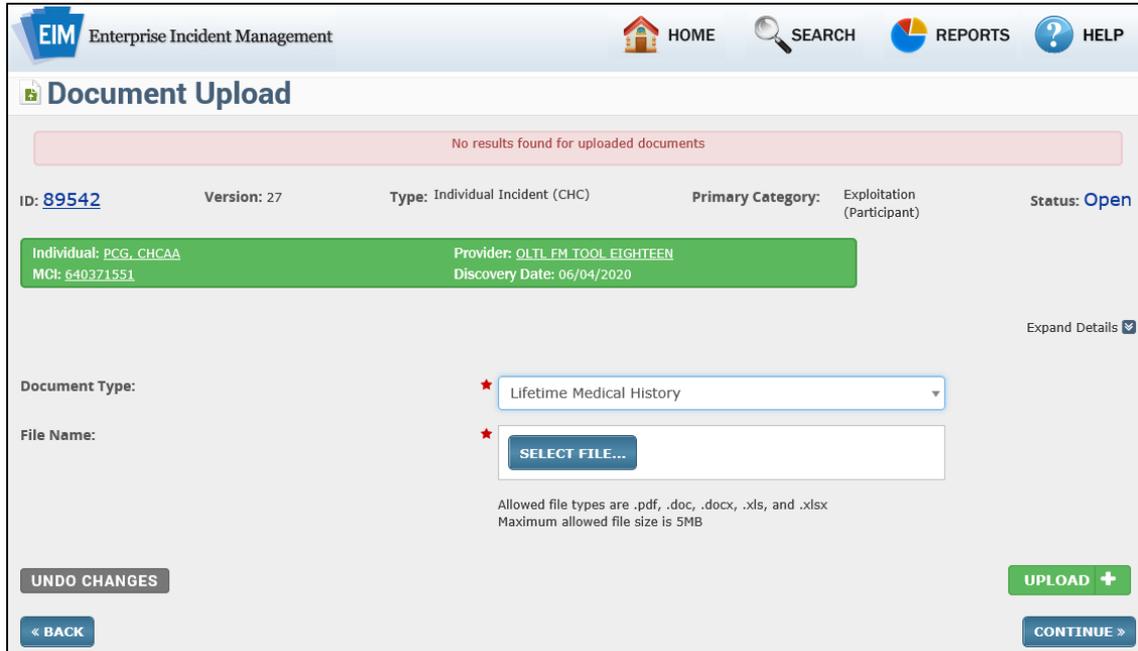
Document Upload

The Document Upload Functionality will allow users to attach documents to incident reports. Important features of this are:

- Documents can only be uploaded one at a time.
- Documents can only be uploaded until the Incident Final Section is submitted.
- The following formats are allowed to be uploaded:
  - PDF
  - DOC
  - DOCX
  - XLS
  - XLSX
- Documents cannot be larger than 5MB.
- Pictures MAY NOT be uploaded.
- The Document Upload Functionality is not available for incidents filed prior to June 27, 2020.
- The following users have the ability to delete documents:
  - Users who uploaded the Document
  - Users from the Reporting Organization
  - State Users

The following slides display the Document Upload screen and functionality.

Document Upload Functionality

pennsylvania
DEPARTMENT OF HUMAN SERVICES

When the Document Upload screen is displayed for the first time the message, No results found for uploaded documents, is always displayed.

- First the user will select the **Document Type they wish to upload from the dropdown.**

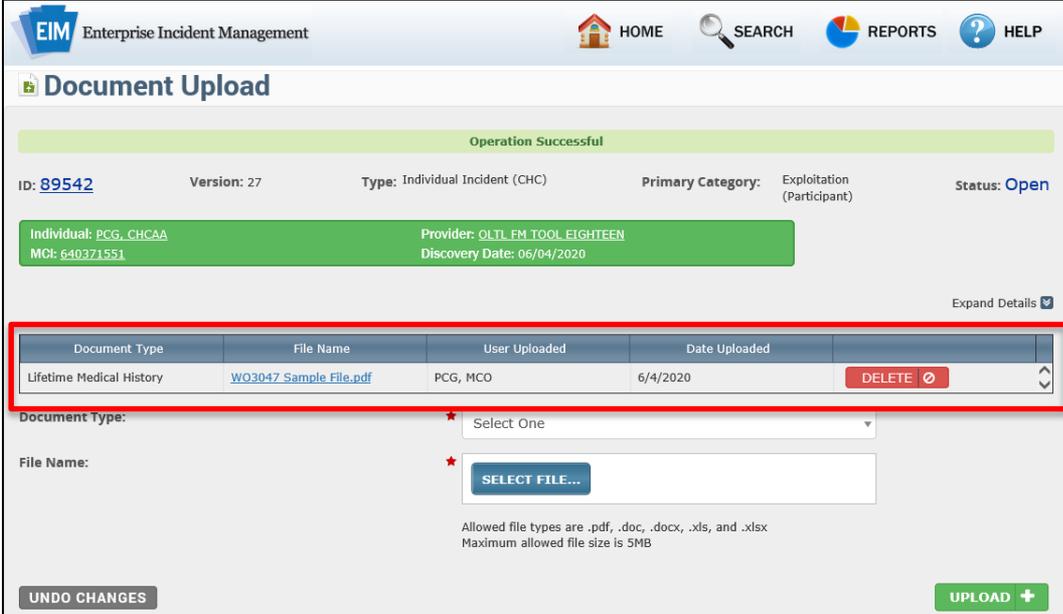**pennsylvania**
DEPARTMENT OF HUMAN SERVICES

- Click **Select File**, and your Windows File Explorer will open.
- Select the File you wish to upload.
- The File will appear on the screen.
- You must click **Upload** to upload the document into EIM.

Document Upload Functionality continued

pennsylvania
DEPARTMENT OF HUMAN SERVICES

- The uploaded document will appear in the table, as shown below.
- Continue these steps until all documents are uploaded.
- Documents may be uploaded until the Incident Final Section is submitted. Any uploaded documents can be viewed, but no additional documents can be uploaded.
- The Document Upload Functionality can be accessed again, if the Incident Final Section is returned.

Sources for Help/Assistance

- Learning Management System (LMS)
- EIM Assistance Email account:
    RA-OLTL_EIMimplement@pa.gov