

Slide 1



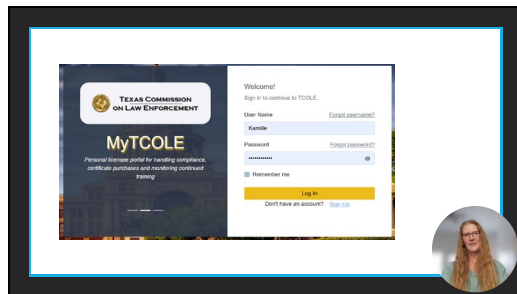
Hello. Thank you for being part of TCOLE's Early Adopters Group. We are grateful for your participation and ready to support your agency's records management journey with OTRR, the open text records repository. This demonstration covers how to upload files into OTRR.

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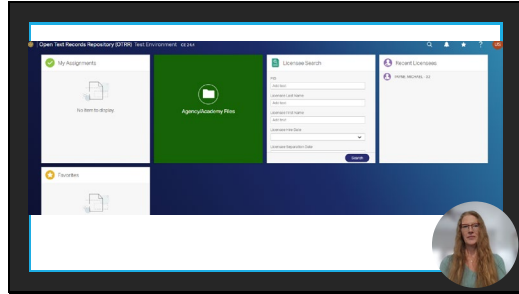
First, let's look at how to upload personnel files. Your Policy on Personnel Files states they will be submitted to TCOLE within 30 days of a licensee's separation. You don't have to wait until separation though. You can upload items to someone's personnel file throughout their time at your agency. You will do that using OTRR.

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Navigate to the TCOLE login Hub to get to OTRR. This is the same place you access your MyTCOLE account.

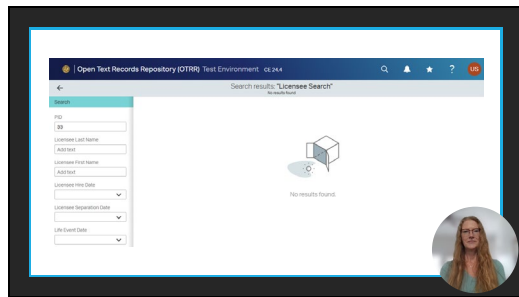
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When you login, you will land on your OTRR home page. To upload personnel files for someone at your agency, you will first need to locate the Licensee in OTRR. To do that, enter their PID or name in the Licensee Search box.

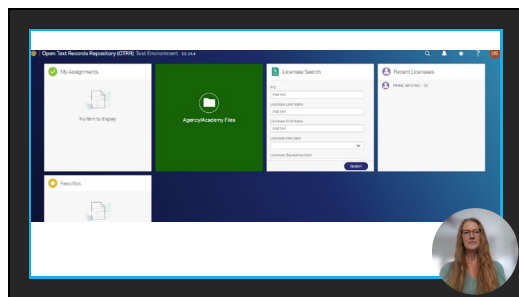
In this scenario, I am an uploader for Hill County Sheriff's Office, and I am going to upload personnel files for David Perry. I enter his last name in the Licensee Last Name Box and enter his first name below it in the Licensee First Name box.

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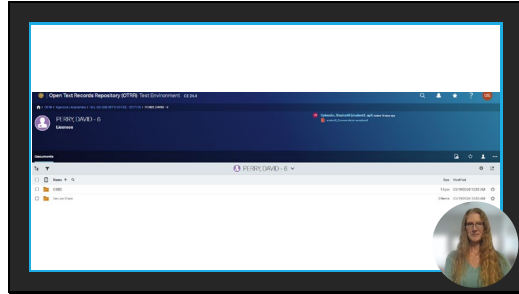
If David Perry doesn't have a workspace in OTRR yet, I'll have to create one because licensee workspaces are not automatically created. Be aware that you'll have to create a licensee workspace the first time you want to upload someone's personnel files.

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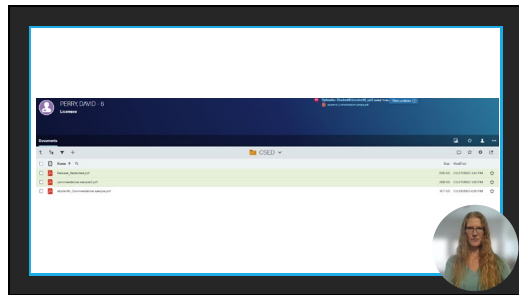
To do that, go to the Agency/Academy Files tile, pick the agency or academy, and add the licensee.

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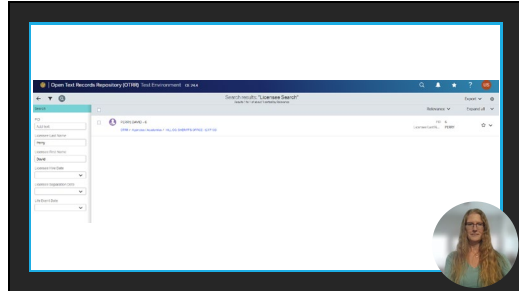
David Perry, like all licensees, has two folders in OTRR. The top folder is called CSED. CSED stands for Confidential Statewide Employment Database. David Perry recently separated from our agency, which means our agency has 30 days to upload his personnel files to the Confidential Statewide Employment Database. CSED is made up of Commendations and Awards, Final Disciplinary Memos, Misconduct Investigation Reports, and Periodic Performance Evaluations. To upload David Perry's personnel files, I will first select the CSED folder.

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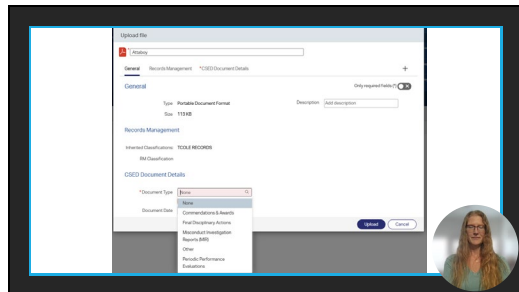
Once inside the CSED folder, I select the plus sign on the left to add an item. Then, I will find the file I want to upload from my computer and select it.

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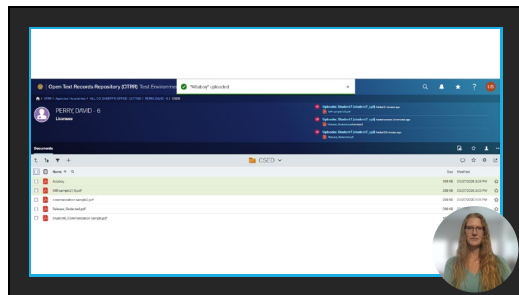
I select his name to see the folders containing his files.

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Then, I will choose the Document Type from the dropdown menu. You can choose Commendation & Awards, Final Disciplinary Actions, Misconduct Investigation Reports, or Periodic Performance Evaluations. Please avoid the document type 'Other.' TCOLE reserves this category for when an appointee submits a formal response to a negative comment in their personnel file. After I indicate the document type, I select Upload.

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A confirmation message appears at the top of my screen, and the uploaded file appears at the top of the list of files in David Perry's CSED folder.

That is the process for uploading personnel files. You can upload personnel files throughout a licensee's time at your agency, or you can upload them when they separate. But if you wait until they separate, your policy on Personnel Files states they must be submitted within 30 days.

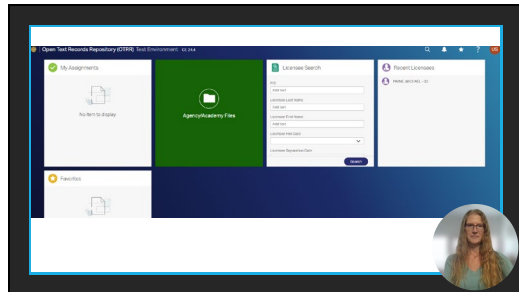
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Uploading Department Files to the new SecureShare



Now we're going to go over how to upload department files to the new SecureShare also located in OTRR. When another law enforcement agency, requests the personnel files of someone currently or previously appointed with your agency, you will also do that using OTRR.

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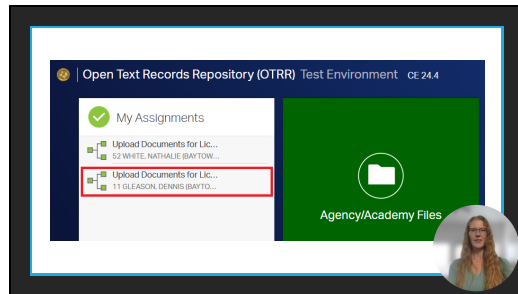
So here we are again at our OTRR home page. As a designated uploader for your agency/academy, you will mainly use 2 tiles you see here.

- In the **My Assignments** tile you will see requests from background investigators at other agencies.
- In the **Agency/Academy Files** tile you'll upload documents when an agency requests files for a background investigation on an applicant..

Right now, in the “My Assignments” tile, you see that you have two tasks waiting for waiting for you. You will

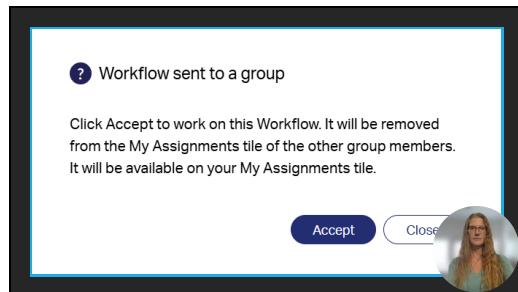
have received an email from OTRR notifying you that another agency is asking for files.

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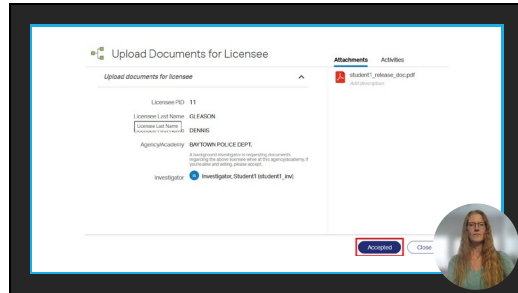
From **My Assignments**, select the **Upload Documents for Licensee** task. If you're the only designated uploader for your agency/academy, continue to the next step.

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If your agency/academy has multiple designated uploaders, an additional window appears. Click **Accept** to take ownership of the upload task. The task is automatically removed from the **My Assignments** tile of other uploaders.

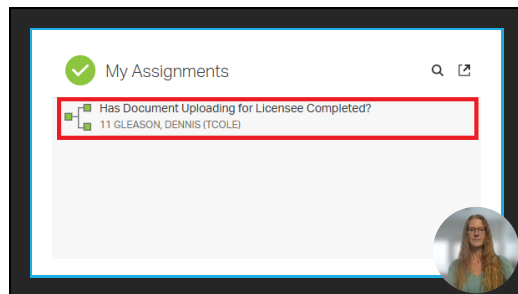
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Review the release form and any additional instructions. The task page displays:

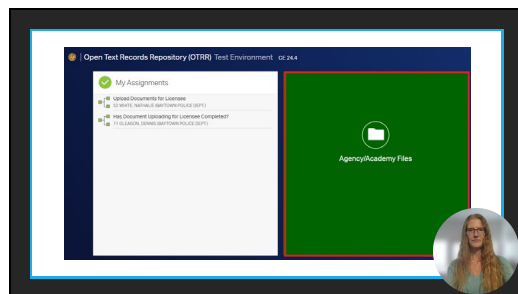
- Licensee details (PID, name, agency/academy name) and the Name of the investigator/recruiter requesting documents
- The release form attached by the investigator/recruiter. When you click **Accepted**, a new task appears **My Assignments** tile.

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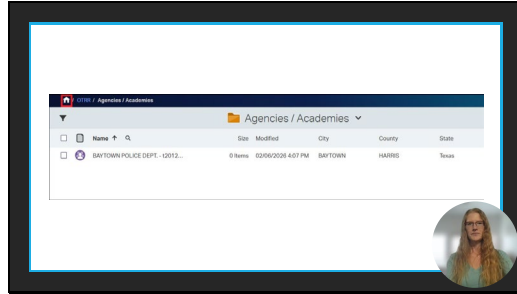
The task has a 10-day expected duration. If the due date passes without completion, the task is marked *Late* and is visible to the investigator, recruiter, and TCOLE administrator.

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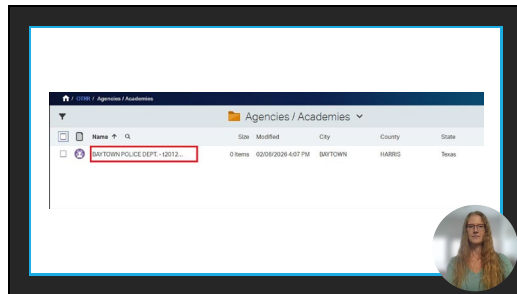
To upload the documents, click the **Agency/Academy Files** tile.

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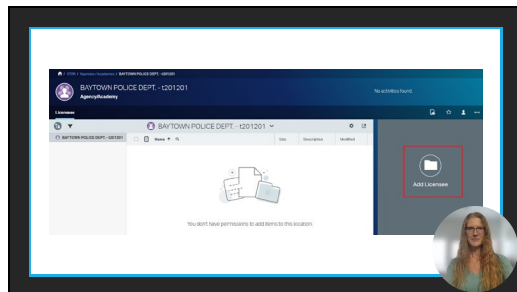
Your agency/academy workspace appears.
Most uploaders will only see one agency/academy workspace listed here. If you support multiple agencies/academies, you will see more.

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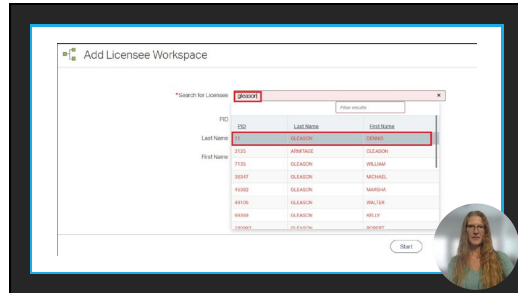
At this point, you are responsible for creating a licensee workspace if one does not exist yet.

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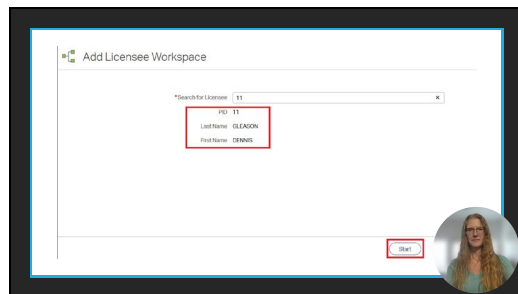
To create workspace, select **Add Licensee**.

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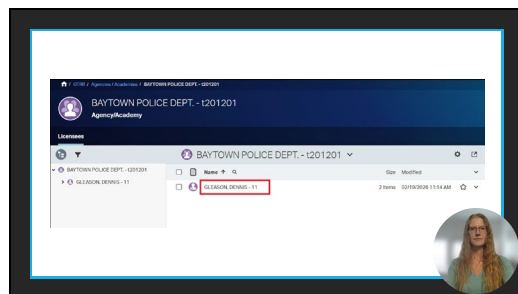
Search for the licensee and select the matching result.

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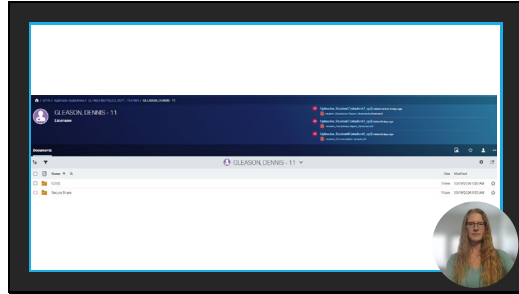
Double check the name and select Start in the bottom left corner.

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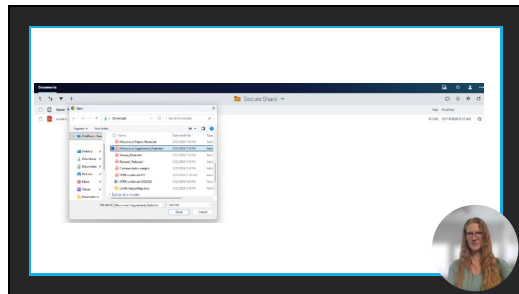
Open the newly created licensee workspace. The licensee workspace may contain two folders: • CSED • Secure Share The folders you see depend on your permission. Documents are uploaded directly to these folders.

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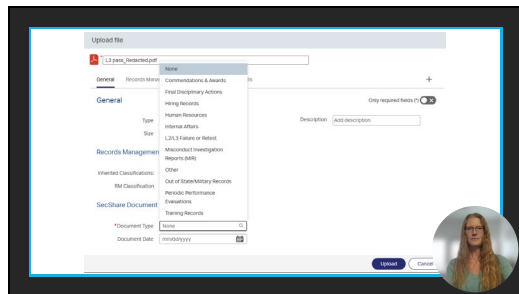
Since you're uploading documents for another agency's background investigation, Select the Secure Share folder.

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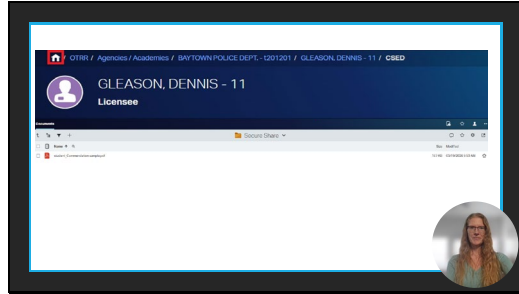
Once inside the SecureShare folder, select the plus sign in the top left corner to add an item. Then, find the file you want to upload from your computer and select it.

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Then, choose the Document Type from the dropdown menu and select Upload in the bottom right of the screen.

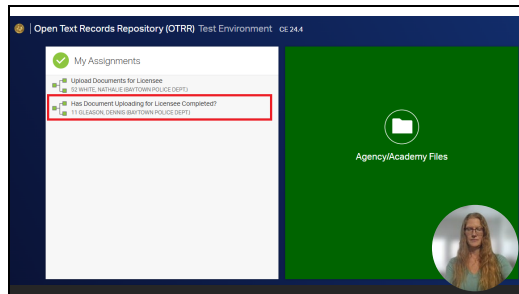
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The uploaded files will populate in a list in SecureShare where they will live for 60 days. That means that anyone investigating that applicant will be able to access those files without you having to upload them again!

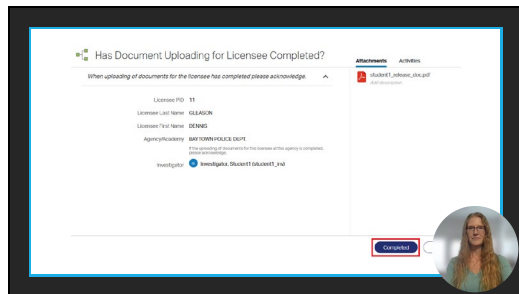
Then, Select the Home icon to return to your Home Page.

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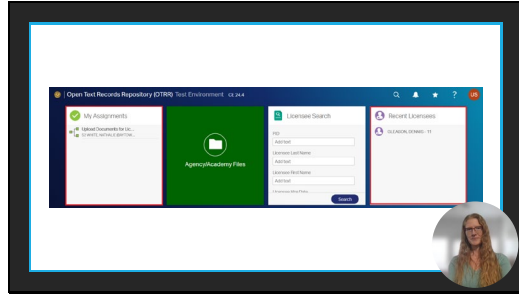
From My Assignments, click the Has Document Uploading for Licensee Completed?

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Select Completed to complete the task.

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The task is removed from your My Assignments tile. OTRR automatically notifies the investigator/recruiter and grants them temporary read-only access to the uploaded documents. Their access is removed once they complete their review. That's it! That is how you upload files to the new SecureShare site in OTRR.