OPTIS User Settings

User Class (what you can see)

A collection of security matrix settings which determine a user's menu options.
OPTIS classes include: Anonymous User, External Registered User, Support Staff, Program Manager, Department Head, and OPTIS Administrator.

Privilege (what you can do)

A set of conditions that define a user's ability to create or modify documents.
Examples: create reimbursement requests, browse notices, approve payments, execute agreements.

User Type (External & Internal)

A person who interacts with the OPTIS system. (External=Transit Provider; Internal=PTD Staff)

Primary or Prime User

Initial user registered for any agency. Has the most privileges of any external user. One per agency.

User Status - Further defines what a user can do.

- ***Primary / Validated for eResponse****
  - Sees all external user menu options
  - Can create and submit (approve) docs for agency (after eResponse issuance**)
  - Can add and delete users; can change user and agency info; can change primary contact
  - Cannot change own personal information
- ***Not Primary / Validated for eResponse****
  - Sees *some* external user menu options
  - Can create and submit (approve) docs for agency (after eResponse issuance**)
  - Cannot add or delete users; cannot change user or agency information or primary contact
  - Can change own personal information
- ***Not Primary / Not Validated for eResponse****
  - Sees *some* external user menu options
  - Cannot create or submit docs for the agency
  - Cannot add or delete users; cannot change user or agency information or primary contact
  - Can change own personal information

* eResponse issuance is the granting of a secure keyword to be used as an electronic signature when approving documents. eResponse keywords are only granted to authorized signatories.

** Validation is a PTD process designed to certify that agencies/users are authorized to create/submit documents in OPTIS.

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⊕ See attached for pictures of OPTIS Navigation Menu options. ⊕

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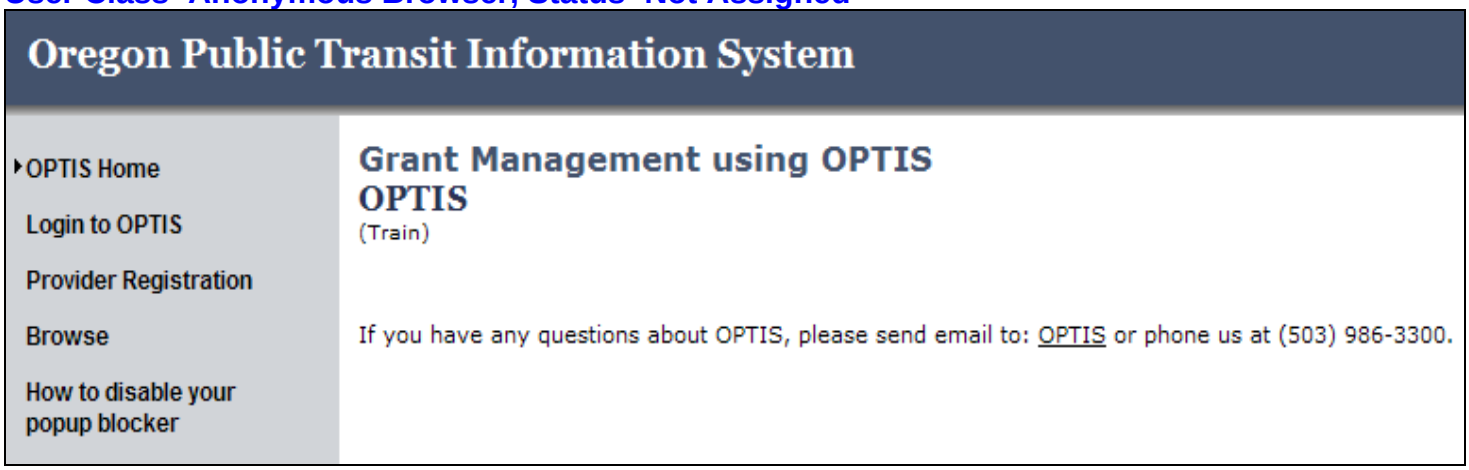
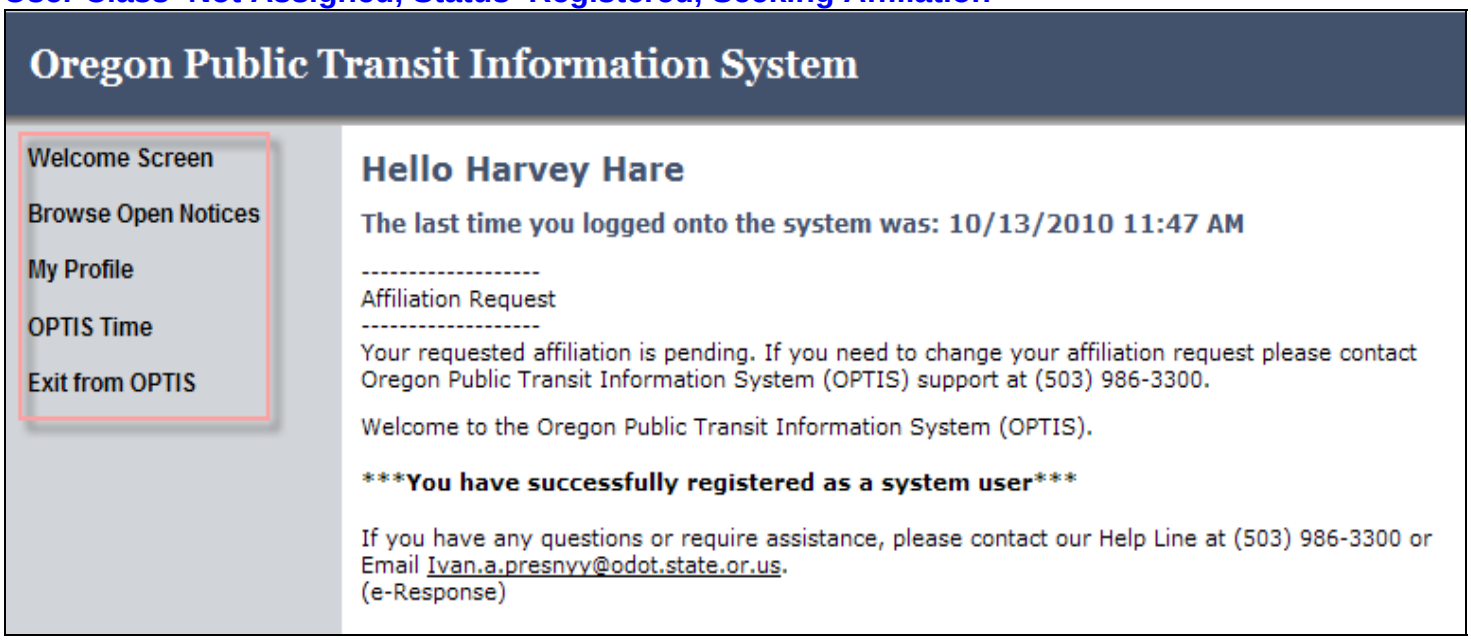
NAVIGATION MENU OPTIONS

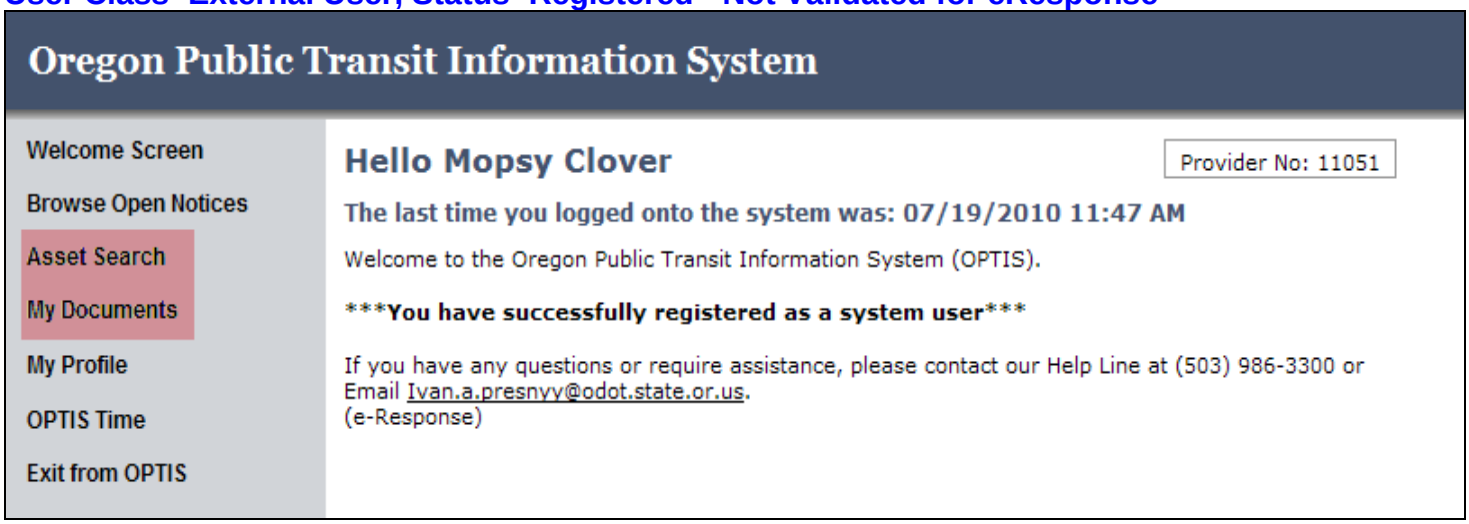
User Class=Anonymous Browser, Status=Not Assigned

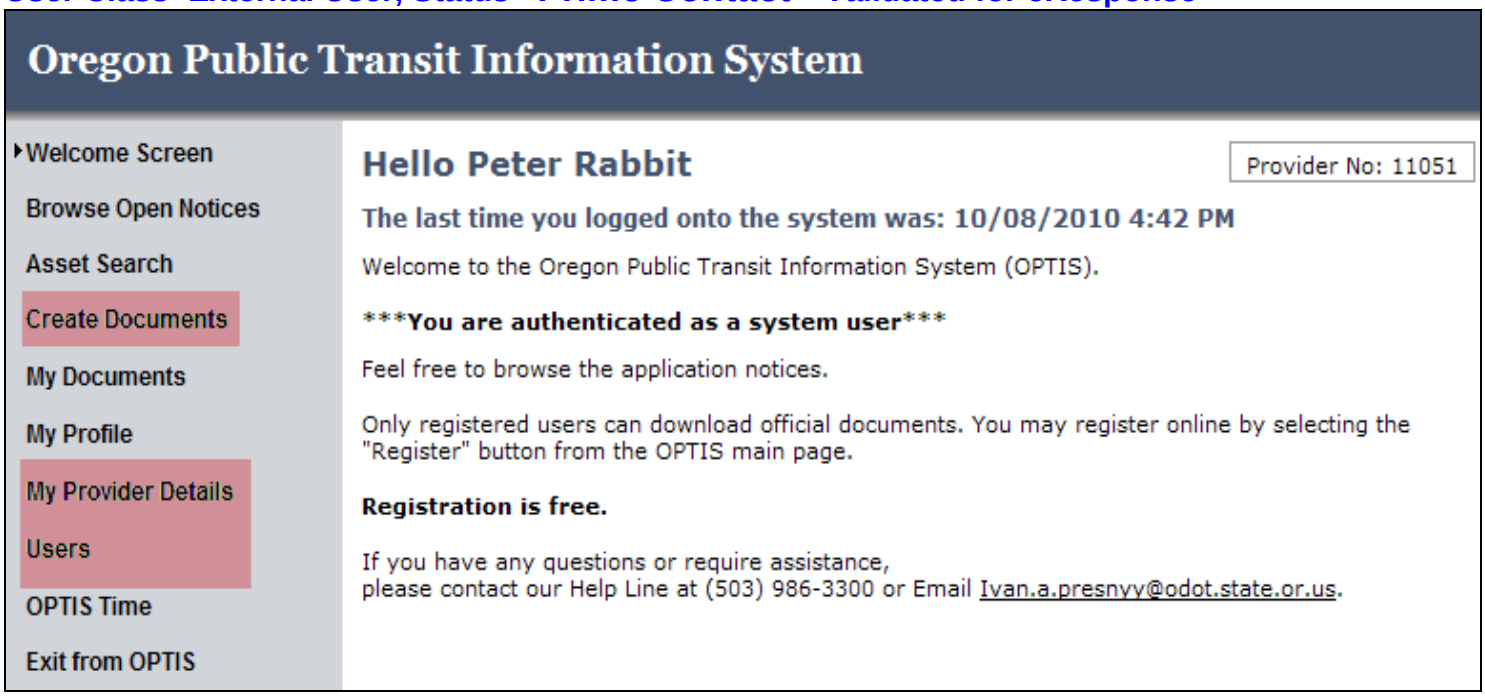


User Class=Not Assigned, Status=Registered, Seeking Affiliation



User Class=External User, Status=Registered - Not Validated for eResponse



User Class=External User, Status=Registered - Validated for eResponse

User Class=External User, Status= *Prime Contact* - Validated for eResponse