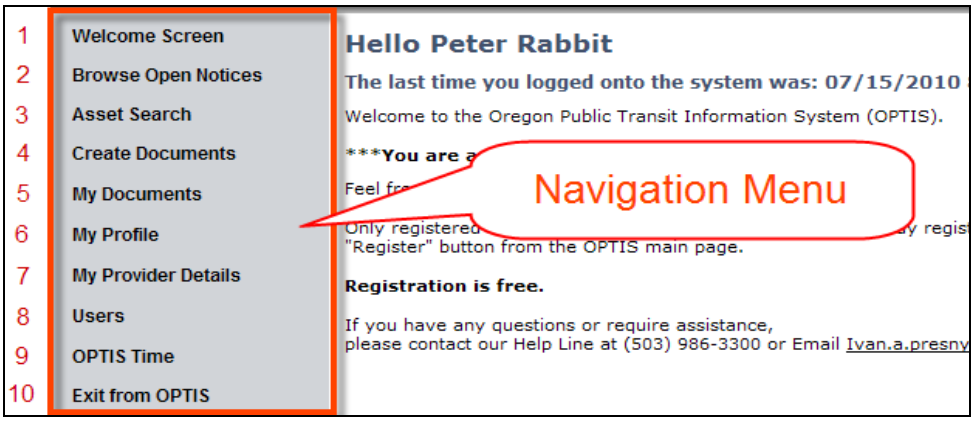
OPTIS NAVIGATION MENU

External User



1. Welcome Screen

Helps you find your way back

2. Browse Open Notices

Search feature for notices. A notice is an announcement of an available application for grant funding. (*Open Notices* only appear during the grant application period.)

3. Asset Search

Find and view assets for your agency

4. Create Documents *(Provisional Privilege)*[1]

- Create Periodic Report
- Create Reimbursement Request

5. My Documents

- Document Search
  - Find by Person
    - Your name is selected by default; you may change name to others in your agency
    - Filter by Document Type, Document Number, Federal ALI Number, Date Range and/or Document Status
  - Find by Document Title
    - This is not the document type, but the title given to any document created in OPTIS
    - Enter words in title of document
    - Titles include whatever was entered when document was created. Could be type of project (Purchased Service, Formula, Capital, etc.), name of provider, fund (JARC, ARRA, NF, etc.), etc.
  - Find by Organization Hierarchy
    - Locates documents for your agency *and* any sub-agency included by your agency in the hierarchy established for you in the system
    - Filter by Document Type, Document Number, Product (ALI), Date Range and/or Document Status

- Find by Organization
  - Locates documents for the agency you are logged into. Your organization is selected by default
  - Filter by Document Type, Document Number, Product (ALI), Date Range and/or Document Status
- Find by Document Number
  - Locates documents by number such as grant number (e.g., 24850) or periodic report number (e.g., APR-09-0123)
  - You may search by exact match or partial match
- Find by Control Number
  - Locates documents by OPTIS-generated 7-digit control number. Used mostly by OGMA to locate items for research
  - Must be entered as an exact match

- Email Notices – A history of emails to you from the system. (Future Process)

6. My Profile

- User Information
  - Name, title, phone numbers, and eContact information
  - Maintain email notification preferences (Future process)
- Change Logon Password – change the password used to access the system
- Change eResponse Keyword – change the password used to validate documents you create
- Service Information – profile of your services
- Location Information – a list of regions in which you provide service
- eServices Information – future process when emailing is activated
- View Agreement – the user agreement for the system
- Registration Summary – information as it exists in the system including agency name, address, phone, and prime contact – look up only

7. My Provider Details (Provisional Privilege)[2]

- Office Information
  - Maintain provider name, class, FEIN, email, website, phone and address information
  - Change primary contact
- Supplemental Information (Optional) – your agency's mission, services, customers, history, and financing
- Organization Hierarchy – the hierarchy for all associated agencies under your profile

8. Users (Provisional Privilege)[2]

- Users – add, change, or delete users and organizations under your control
- Affiliation Maintenance – accept or reject users seeking to be affiliated with your agency

9. OPTIS Time – Shows the current date and time clock. Used by the system to track workflow completion on documents.

10. Exit from OPTIS – The best way to exit the system

[1] Privilege applies to validated user only
[2] Privilege applies to Primary Contact only