

OPUS

System Administrators Manual

Updated March 17, 2010

Presented by:

Oregon Housing & Community Services

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1-800-453-5511, Option 6

OPUS is the name for a group of related web-based computer applications. OPUS supports the programs of the Community Resources Division (CRD) of Oregon Housing and Community Services (OHCS).

OPUS is designed to meet OHCS data collection and business processing needs jointly developed with service delivery partners. It is available to our partners free of cost. OPUS will eventually encompass all CRD-funded programs, enabling users to enter information once--avoiding duplication and potential errors.

OPUS HELPDESK

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Oregon OPUS Data Collection System OPUS System Administrator Agreement

Agency Name _____

The Agency Administrator is the primary OPUS contact at the agency. This person will be responsible for:

- Providing a single point of contact between the end users and the OPUS Help Desk
- Ensure that Internet and Network connections are stable and secure
- Training all End Users
- Ensure Agency *User Policy, Responsibility, & Code of Ethics* form is signed annually by all users prior to users accessing OPUS
- Monitoring compliance with standards of client confidentiality and ethical data collection, entry and retrieval, and a consumer complaint process
- Managing Agency Users accounts including immediate revocation of access for terminated employees

Each agency participating in OPUS will designate an Agency Administrator to fulfill the duties describe above.

Printed Agency Administrator Name	Agency Administrator Signature	Date
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The following individuals are identified as points of contact for the specified programs.

<u>CSBG</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date
<u>E2C2</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date
<u>FISCAL</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date
<u>HMIS-COC</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date
<u>LIEAP-OEA</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date
<u>WEATHERIZATION</u>			
Program Name	Printed Point of Contact Name	Point of Contacts Signature	Date

Print Executive Director Name	Executive Director Signature	Date
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USER POLICY, RESPONSIBILITY, & CODE OF ETHICS

For Oregon OPUS Data Collection System

USER POLICY

In order to meet the requirements of various Federal and state agencies, the Oregon OPUS data collection system is a collaborative statewide effort among helping agencies to document client-level needs and characteristics through a coordinated system that aggregates common information at the agency, community, and state levels

OPUS is a tool that can also assist agencies in focusing services and locating alternative resources to help homeless and low-income persons. Agency staff may use the Client information in the system to target services to the Client's needs.

OPUS is an entirely web-based system -- hosted on a central statewide server -- coordinated by the Oregon Housing and Community Services Department. The system is accessed via the Internet by provider sites offering shelter, housing, and supportive services to homeless and low-income individuals and families.

Participating Agencies shall have rights to the data pertaining to their clients that they directly enter into the OPUS.

All OPUS Users are required to be trained prior to using the system.

All OPUS Users are required to read, understand, and sign the *User Policy, Responsibility, & Code of Ethics* form prior to using OPUS.

All OPUS Users are required to have read and understand their Agency's Privacy Notice.

The Agency and Users understands that informed client consent is required before any basic identifying client information is searched, accessed or entered into OPUS.

Data Entry

Data necessary for the development of aggregate reports of services, including services needed, services provided, referrals and Client goals and outcomes should be entered to the greatest extent possible. However, all agencies are required to complete mandatory data fields identified in the OPUS system.

Restricted Information

Information, including progress notes and psychotherapy notes, about the diagnosis, treatment, or referrals related to a mental health disorder, drug or alcohol disorder, HIV, or AIDS, and domestic violence concerns shall **not** be shared with other Participating Agencies through OPUS. This information should also not be entered in any open notes sections in the Oregon Statewide OPUS system.

USER RESPONSIBILITY

Your User ID and Password give you access and authority to use the OPUS system and creates an audit trail. Initial each item below to indicate your understanding and acceptance of the proper use of your User ID and password. Failure to uphold the confidentiality standards set forth below is grounds for immediate termination of User privileges and you may be subject to further penalties.

Please initial each item below to indicate your acceptance and understanding of the user responsibilities below.

- _____ I have read and understand my Agency's Privacy Notice.
- _____ My User ID and Passwords must be kept secure and are not to be shared with anyone, including other staff members. I must take all reasonable means to keep my Password physically secure.
- _____ I understand that my access to OPUS is limited to my designated work site unless I am given expressed written consent of the Agency Administrator to access the system from other specified locations.
- _____ I understand that the only individuals who may view information in OPUS are authorized users who have received appropriate confidentiality training. OPUS users must respect the privacy and hold in confidence all information obtained in the course of their use of the system.
- _____ I may only view, obtain, disclose, or use information from OPUS that is necessary to perform my job.
- _____ Client information should be accessed only in order to retrieve, update, or report data relevant to a client requesting services from my agency.
- _____ If I am logged into OPUS and must leave the work area where the PC is located, I must log-off of the OPUS system or lock the PC before leaving the work area.
- _____ A PC that has OPUS open and running shall never be left unattended.
- _____ A PC that has OPUS open and running shall never be arranged so that unauthorized OPUS users may see the information on the screen.
- _____ I understand that failure to log off of OPUS appropriately may result in a breach in client confidentiality and system security.
- _____ Hard copies and downloads of information from OPUS onto a hard drive or disk must be kept secure to ensure that only appropriate agency staff has access.
- _____ When hard copies and downloads of OPUS Client information are no longer needed, they must be properly destroyed as described in your agency's policies.

**PRINT
NAME**

AGENCY

- _____ If I notice or suspect a security breach, I must immediately notify my Agency Administrator for OPUS and my Executive Director or the OPUS System Administrator.
- _____ I understand that I am responsible for reporting any system malfunctions or “bugs” that I notice or suspect to the Agency Administrator and other appropriate system support staff.
- _____ I understand that in the event that I am terminated or leave my employment with this agency, my access to OPUS will be deemed revoked. I covenant and agree not to attempt to access OPUS upon termination of my employment with this agency.

OPUS User Signature

Date

OPUS Agency/System Administrator Signature

Date

Agency Director

Date

USER CODE OF ETHICS

- A. Oregon OPUS Users must treat Participating Agencies with respect, fairness and good faith.
- B. Each Oregon OPUS User shall maintain high standards of professional conduct in his/her capacity as an Oregon OPUS User.
- C. All Oregon OPUS Users shall endorse and maintain the client's rights related to privacy and confidentiality and shall adhere to the OPUS *Policy Notice to Consumers of Services*.
- D. The Oregon OPUS User has primary responsibility for his/her Client(s).
- E. The Oregon OPUS Users will not misrepresent its client base in the Oregon OPUS system by entering knowingly inaccurate information (i.e. User will not purposefully enter inaccurate information on a new record or to over-ride information entered by another agency.)
- F. Discriminatory comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation are not permitted in the Oregon OPUS system
- G. The User will not use the Oregon OPUS system with intent to defraud the federal, state, or local government or an individual entity; or to conduct any illegal activity.

I understand and agree to comply with all the statements listed above.

OPUS User Signature

Date

OPUS Agency/System Administrator Signature

Date

Agency Executive Director

Date

User Screens

A manager sets up user accounts and roles (permissions) in the OPUS system for the agency staff. Staff roles and actions depend on what job functions are to be performed by individual working in OPUS. Some users will have minimum; view only access. Some users will need additional roles to process client intakes and/or reports. Some users will have additional roles for management functions. There are six types of 'User' screens: 'Search', 'New', 'View', 'Edit', 'User Role Edit' and 'User Action Edit'.

User Search

The 'User Search' screen allows a manager and/or another user to search for a person who is registered in OPUS.

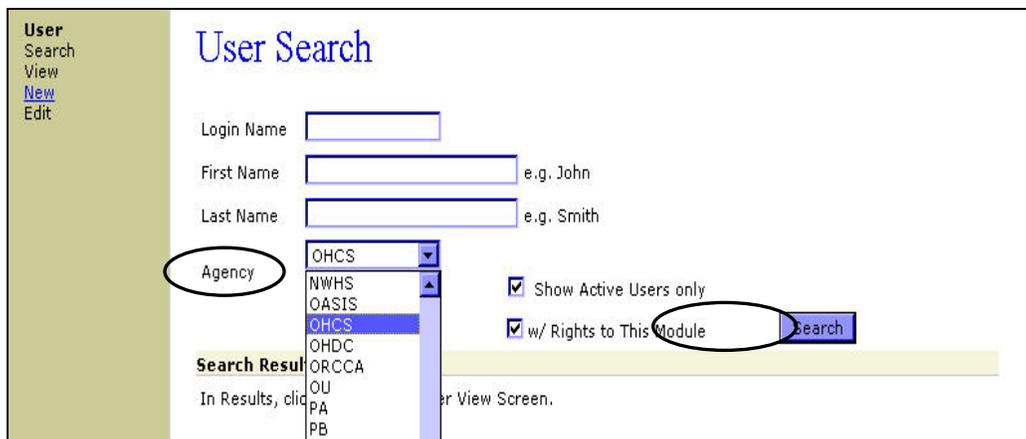
Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management', down to and click 'User' (reference figure 5-17). The 'User Search' screen will appear next (reference figure 5-217A).



Figure 5-17: User Menu



Search Result
ORCCA
OU
PA
PB

Figure 5-17A: User Search by agency screen.

2. Enter a users name or search by 'Agency'. **Note:** Parent agencies have access to sub-agency staff within their structure. To search by 'Agency', use the drop-down arrow and select the appropriate agency and click 'Search'. To search by user name, type in the first and/or last name then click 'Search'.

A list of staff members will appear in the 'Search Results'. In the 'Search Results', user names can be placed in alphabetical order by first name, last name or login name by clicking on the link(s) (reference figure 5-17B).

The screenshot shows the 'User Search' interface. On the left is a navigation menu with 'User', 'Search', 'View', 'New', and 'Edit'. The main area is titled 'User Search' and contains input fields for 'Login Name', 'First Name' (with 'e.g. John'), and 'Last Name' (with 'e.g. Smith'). There is a dropdown for 'Agency' set to 'OHCS'. Two checkboxes are checked: 'Show Active Users only' and 'w/ Rights to This Module'. A 'Search' button is present. Below is the 'Search Results' section, which includes a table with columns for 'First Name', 'Last Name', 'Login Name', and 'Agency'. The first two columns are circled in red. A text box on the right of the table states 'Login names have been blocked'.

First Name	Last Name	Login Name	Agency
RONALD	FOUR		OHCS
BRANDON	STONIER		OHCS
BRENT	HOLMES		OHCS
JOHN	OVERMAN		OHCS
SHARON	BOWSER		OHCS
KRIS	KOLODY		OHCS
KERRI	HAWORTH		OHCS
CAROL	WAGNER		OHCS
MELISSA	TORGERSON		OHCS
LORI	OPENSHAW		OHCS
EARL	RUTLEDGE		OHCS
THERESA	WINGARD		OHCS

Figure 5-17B: User Search with Search Results screen.

3. Click on a name to see 'User View' screen. The 'User View' screen allows a manger to view an individual user's roles (reference figure 5-17C).

The screenshot shows the 'User View' interface. On the left is a navigation menu with 'User', 'Search', 'View', 'New', 'Edit User', and 'Edit Roles'. The main area is titled 'User View' and contains a 'User Details' section. The details include: Agency (OHCS), Username (SBOWSER), Active (Y), First Name (SHARON), Last Name (BOWSER), Middle Name, Initials (SB), Title (OPUS HELPDESK LEAD, CSS ADMIN. ASSISTANT), Roles (MANAGER, VIEW, INTAKE PAYMENT, AGENCY FISCAL, AGENCY COORDINATOR, OHCS FISCAL, ADMIN, INTAKE CLIENT, REPORT), E-mail (sharon.bowser@hcs.state.or.us), Phone (503-986-2007), and Modules (CSBG, E2C2, FISCAL, FOOD, HMIS-COC, LIEAP-OEA, REACH, UTILITY, WEATHERIZATION). At the bottom, it shows 'Last edited at 02-05-2008 11:54 AM by SBOWSER' and buttons for 'Disable User', 'Disable User/All Modules', and 'Edit User'.

Figure 5-17C: User View screen.

Possible Disabled User

IMPORTANT NOTE: If there is a possibility that a user might have been enrolled before in OPUS but a search results indicates no match, follow these steps:

1. Reference the procedure 'User Search'. In 'Search Results', if a specific user's name does not appear, click the boxes "Show Active Users Only" and "w/Rights to This Module", removing the 'Checkmark' then click 'Search' (reference figure 5-17).

These steps will allow an agency's users to appear regardless what module the user has permission to work in and it will show all users who have been disabled. To reactivate a disabled user, reference the 'Reactivate a User' section listed below.

The screenshot shows the 'User Search' interface. On the left is a navigation menu with 'User', 'Search', 'View', 'New', and 'Edit'. The main area has a title 'User Search' and search criteria: 'Login Name' (text input), 'First Name' (text input with example 'e.g. John'), 'Last Name' (text input with example 'e.g. Smith'), and 'Agency' (dropdown menu with 'OHCS' selected). Below these are two checkboxes: 'Show Active Users only' and 'w/ Rights to This Module', both of which are checked. A 'Search' button is located to the right of these checkboxes. Below the search criteria is a 'Search Results' section with a yellow header. It contains the instruction 'In Results, click Name to see User View Screen.' and a table of search results. The table has columns for 'First Name', 'Last Name', 'Login Name', and 'Agency'. The 'Login Name' column contains the text 'Login names blocked'. The table lists 13 users with their first and last names and the agency 'OHCS'.

<u>First Name</u>	<u>Last Name</u>	<u>Login Name</u>	<u>Agency</u>
RONALD	TOUB		OHCS
BRANDON	STONIER		OHCS
BRENT	HOLMES	Login names blocked	OHCS
JOHN	OVERMAN		OHCS
SHARON	BOWSER		OHCS
KRIS	KOLODY		OHCS
KERRI	HAWORTH		OHCS
CAROL	WAGNER		OHCS
MELISSA	TORGERSON		OHCS
LORI	OPENSHAW		OHCS
EARL	RUTLEDGE		OHCS
THERESA	WINGARD		OHCS

Figure 5-17: Searching for users, Active users and rights to the module screen.

2. If there are no matches found in the database, a manager can create a new user.

User New

The User New Screen allows a manager to create a new user in the OPUS System.

Setup:

On the 'User Search' screen.

1. Using the left Nav Bar, under 'User', click 'New' (reference figure 5-18). The 'User New' screen will appear next (reference figure 5-18B).



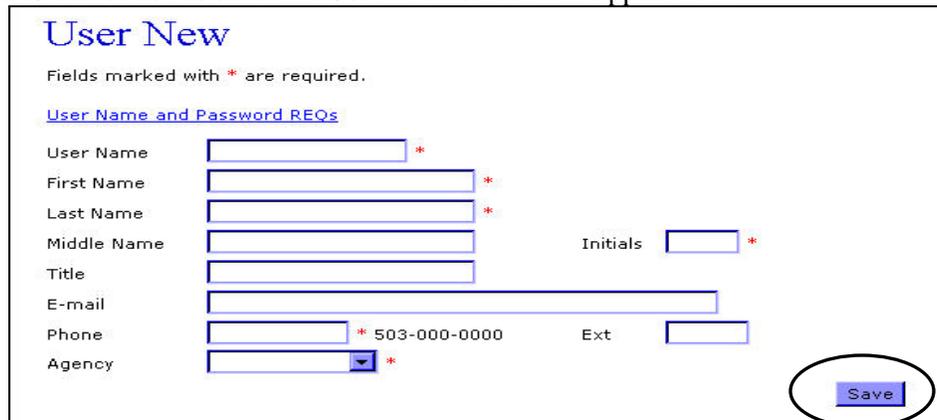
The screenshot shows the 'User Search' interface. On the left, a vertical navigation bar contains the following links: 'User', 'Search', 'View', 'New', and 'Edit'. The 'New' link is highlighted with a red circle. The main content area is titled 'User Search' and contains several input fields: 'Login Name', 'First Name' (with a placeholder 'e.g. John'), 'Last Name' (with a placeholder 'e.g. Smith'), and 'Agency' (a dropdown menu). There are two checkboxes: 'Show Active Users only' and 'w/ Rights to This Module', both of which are checked. A 'Search' button is located at the bottom right of the form.

Figure 5-18: User Search – New User screen.

Type or select (*all fields marked * are required*).

- User name. **Note:** Refer to the User name and password requirements link.
- First name.
- Last name.
- Middle name or initial (optional).
- Initials.
- Title.
- Role - includes the "Permission Levels" by screen.
- E-mail. This is optional **but Note:** OHCS communicates regularly via e-mail. OPUS Broadcasts are via e-mail along with announcements. Make sure the e-mail address is correct. ****OPUS Broadcasts are announcements from OHCS stating something is wrong or something is being worked on, updated or fixed. OPUS Broadcasts are done on 'URGENT' basis only. Read all OPUS Broadcast.**
- Phone and Extension if applicable.
- Agency.

Click the 'Save' button to save The User View screen will appear next.



The screenshot shows the 'User New' form. At the top, it says 'User New' and 'Fields marked with * are required.' Below this is a link: 'User Name and Password REQs'. The form contains several input fields: 'User Name', 'First Name', 'Last Name', 'Middle Name', 'Initials', 'Title', 'E-mail', 'Phone' (with a placeholder '* 503-000-0000'), 'Ext', and 'Agency'. The 'User Name', 'First Name', 'Last Name', 'Initials', and 'Agency' fields are marked with a red asterisk (*). A 'Save' button is located at the bottom right of the form and is circled in red.

Figure 5-18B: User New screen.

User View

The 'User View' screen allows a manager to view or edit information on an individual user and to view 'Roles' (permission) level a user has been assigned (*reference figure 5-19*). To edit roles, follow the instructions listed below.

The screenshot shows the 'User View' interface. On the left is a navigation menu with links: User, Search, View, New, Edit User, and Edit Roles. The main content area displays user details for Sharon Bowser. At the bottom right, the 'Edit User' button is circled in blue.

User Details			
Agency	OHCS		
Username	SBOWSER	Active	Y
First Name	SHARON		
Last Name	BOWSER		
Middle Name		Initials	SB
Title	OPUS HELPDESK LEAD, CSS ADMIN. ASSISTANT	Roles	MANAGER , VIEW , INTAKE PAYMENT , AGENCY FISCAL , AGENCY COORDINATOR , OHCS FISCAL , ADMIN , INTAKE CLIENT , REPORT
E-mail	sharon.bowser@hcs.state.or.us	Edit Roles	
Phone	503-986-2007		
Modules	CSBG , E2C2 , FISCAL , FOOD , HMIS-COC , LIEAP-OEA , REACH , UTILITY , WEATHERIZATION		
Last edited at 02-05-2008 11:54 AM by SBOWSER			
Disable User		Disable User/All Modules	
		Edit User	

Figure 5-19: User View – to Edit screen.

User Role Edit

The 'User Role Edit' screen allows a manager to grant or adjust the roles and actions a user has access to on an as needed basis, per screen or assigned task. To edit user roles and actions, follow the steps below.

Note: There are two steps issuing roles. The first step is establishing permissions for a user. For each role there is a default set of actions, which initially allows permissions to all the actions associated within the specific role.

Setup:

1. On the 'User View' screen, click the 'Edit Roles' button or click on the 'Edit Roles' link in the Left Nav Bar (*reference figure 5-19, above*). The 'User Role Edit' screen will appear.
2. On the 'User Role Edit' screen, select the role(s) the user will have access to (*reference figure 5-19A, below*) then click the 'Update' button to apply the roles. The 'User View' screen will appear again. The 'Roles' are now listed in the 'User View' screen (*reference figure 5-19C*). **This completes Step One.**

If the user needs all the default permissions associated with a given role, there is no need to do any further steps. There may be times when a user needs additional permissions within a role so they can do specific actions within a specific role.

At the same time, there might be permissions within a specific role that a user does not need access to perform. To customize permissions within a role, follow the instructions below.

User Action Edit

Setup:

On the 'User Role Edit' screen.

1. Click on 'Edit Actions' (reference figure 5-19A above). The 'User Role Action Edit' screen will appear (reference figure 5-19C, below).

User Role Edit

Name: SHARON BOWSER
Username: SBOWSER

User Roles
How To: Check box next to Role, as needed.
To Edit a Role - Click the Edit Actions link.
Note: A role must first have been assigned and saved, before the Edit Actions link is available

MANAGER	<input checked="" type="checkbox"/>	Edit Actions
AGENCY FISCAL	<input checked="" type="checkbox"/>	Edit Actions
INTAKE CLIENT	<input checked="" type="checkbox"/>	Edit Actions
VIEW	<input checked="" type="checkbox"/>	Edit Actions
INTAKE PAYMENT	<input checked="" type="checkbox"/>	Edit Actions
AGENCY COORDINATOR	<input checked="" type="checkbox"/>	Edit Actions
OHCS FISCAL	<input checked="" type="checkbox"/>	Edit Actions
REPORT	<input checked="" type="checkbox"/>	Edit Actions
ADMIN	<input checked="" type="checkbox"/>	Edit Actions

Figure 5-19A: User Role Edit screen.

- On the 'User Role Action Edit' screen, a manager can 'Allow' or 'Deny' permissions within any specific role. The permissions are decided by the OPUS Administrator and Manager(s) of the agencies. Once permissions have been assigned, click the 'Save' button. The 'User View' screen will appear. This step needs to be repeated for each specific role that requires permission within it to be edited (*reference figure 5-19B*).

User Role Action Edit

REPORT - LIEAPOEA Reports

Name: SHARON BOWSER
Username: SBOWSER

Edit Actions within Role

Allow	Deny	
<input checked="" type="radio"/>	<input type="radio"/>	User - View user account information
<input checked="" type="radio"/>	<input type="radio"/>	User - Edit user account information
<input checked="" type="radio"/>	<input type="radio"/>	Agency - Create new agency
<input checked="" type="radio"/>	<input type="radio"/>	Program - Add a new program
<input checked="" type="radio"/>	<input type="radio"/>	Manual - LIEAPOEA Management
<input checked="" type="radio"/>	<input type="radio"/>	Vendor - Create New Vendor
<input checked="" type="radio"/>	<input type="radio"/>	Vendor - Edit Vendor
<input checked="" type="radio"/>	<input type="radio"/>	APC - Delete APC
<input checked="" type="radio"/>	<input type="radio"/>	User - Create new user
<input checked="" type="radio"/>	<input type="radio"/>	Agency - Edit agency information
<input checked="" type="radio"/>	<input type="radio"/>	APC - Create new APC relationship
<input checked="" type="radio"/>	<input type="radio"/>	User - Delete User Account
<input checked="" type="radio"/>	<input type="radio"/>	APC - Edit APC information
<input checked="" type="radio"/>	<input type="radio"/>	User - Edit the Roles for user accounts
<input checked="" type="radio"/>	<input type="radio"/>	User - Edit the Actions for user accounts
<input checked="" type="radio"/>	<input type="radio"/>	User - Search for user accounts
<input checked="" type="radio"/>	<input type="radio"/>	Program - Edit a program

Save

Figure 5-19B: User Role Edit screen.

Delete User

When users are deleted, the user's name is basically cancelled. The user's name stays in the database in an inactive list and never really deleted. To locate a user that could have been deleted, refer to 'Possible Deleted User' previously discussed.

To cancel a user account, a manager will click the 'Disable User' or 'Disable User/All Modules' button (reference figure 5-19C). For user(s) who have access to multiple modules, it's best to use 'Disable User/All Modules'.

The screenshot shows the 'User View' interface. On the left is a navigation menu with links: User, Search, View, New, Edit User, and Edit Roles. The main content area is titled 'User View' and contains a 'User Details' section. The details are as follows:

Agency	OHCS		
Username	SBOWSER	Active	Y
First Name	SHARON		
Last Name	BOWSER		
Middle Name		Initials	SB
Title	OPUS HELPDESK LEAD, CSS ADMIN. ASSISTANT	Roles	MANAGER , VIEW , INTAKE PAYMENT , AGENCY FISCAL , AGENCY COORDINATOR , OHCS FISCAL , ADMIN , INTAKE CLIENT , REPORT
E-mail	sharon.bowser@hcs.state.or.us	Edit Roles	
Phone	503-986-2007		
Modules	CSBG , E2C2 , FISCAL , FOOD , HMIS-COC , LIEAP-OEA , REACH , UTILITY , WEATHERIZATION		
Last edited at 02-05-2008 11:54 AM by SBOWSER			
Disable User		Disable User/All Modules	
			Edit User

Figure 5-19C: User View Delete User screen.

Reset User Password

Setup:

1. Using the 'User View', click the 'Edit User' button or the 'Edit User' link in the Left Nav Bar. The 'User Edit' screen will appear (reference figure 5-21).

This screenshot is identical to Figure 5-19C, showing the 'User View' interface for Sharon BOWSER. The 'Edit User' button at the bottom right is circled in red.

Figure 5-20: User View screen.

2. On the 'User Edit' screen, verify that the e-mail address in the email block is correct and accurate (note some email servers are case sensitive). If the email address is incorrect the best way to correct it is to cut and paste the email from an email sent to you by the individual in question.

User Edit
Fields marked with * are required.

[User Name and Password REQs](#)

User Name SBOWSER

First Name SHARON *

Last Name BOWSER *

Middle Name Initials SB *

Title OPUS HELPDESK LEAD, CSS

E-mail sharon.bowser@hcs.state.or.us

Phone 503-986-2007 * e.g. 503-000-0000 Ext

Agency OHCS *

Reset password

Save Changes

3. On the 'User Edit' screen, check box "Reset password". A manager would use this feature if a current user forgot the password or if an agency has a policy to reset passwords for routine reasons (reference figure 5-21).

User Edit
Fields marked with * are required.

[User Name and Password REQs](#)

User Name SBOWSER

First Name SHARON *

Last Name BOWSER *

Middle Name Initials SB *

Title OPUS HELPDESK LEAD, CSS

E-mail sharon.bowser@hcs.state.or.us

Phone 503-986-2007 * e.g. 503-000-0000 Ext

Agency OHCS *

Reset password

Save Changes

Figure 5-21: User Edit – Reset Password screen.

4. Click the 'Save Changes' button. A temporary password will be sent to the user via email. The User View screen will display. The user will need to log in the next time with a temporary password..

Changing Temporary Password

1. On the 'Login' screen, type the 'Your User Name' and the temporary password you received via email. The user will be prompted to change it on the next screen. The 'User Name' is not case sensitive. The 'Password' *is* case sensitive.



2. Click the 'Login' button.
3. The 'Change Password' screen will appear. For the 'Old Password'; type the temporary (default) password again.



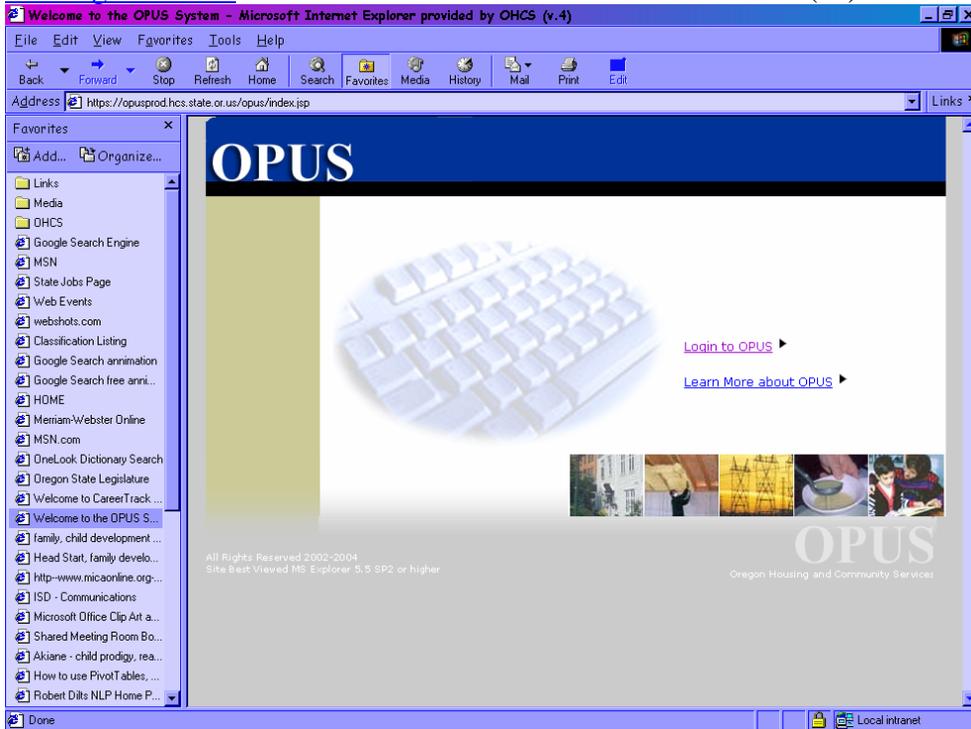
Temporary Password is the 'Old Password'

4. Type a new password (this will be the permanent one to use on a regular basis unless there is a password reset). Permanent passwords need to be at least eight (8) characters, at least one upper-case letter, at least one lower-case letter, and at least one number or special character in the middle somewhere (characters such as #, *, -, @, \$). If the number or special character is at the beginning or end, it doesn't count toward the one not at the beginning or end.
5. In the next box, re-type your new password, to confirm.
6. Click the 'Change' button.

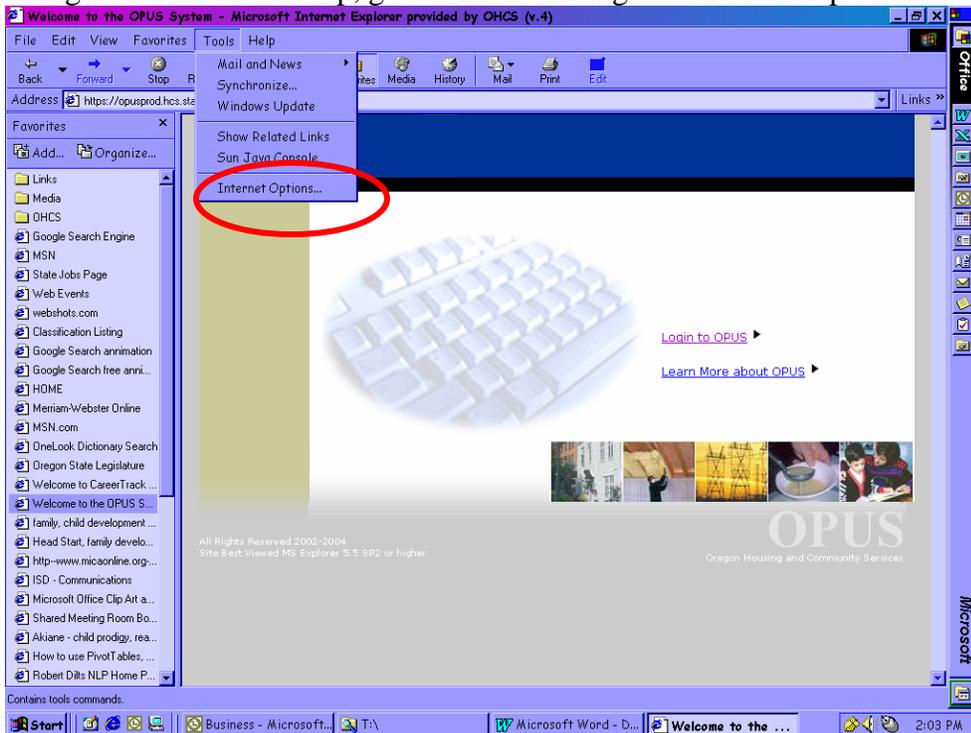
NOTE: TAs of March 17, 2009 the is no longer a default password. This was eliminated with the upgrade of the security protocols and migration to the new server.

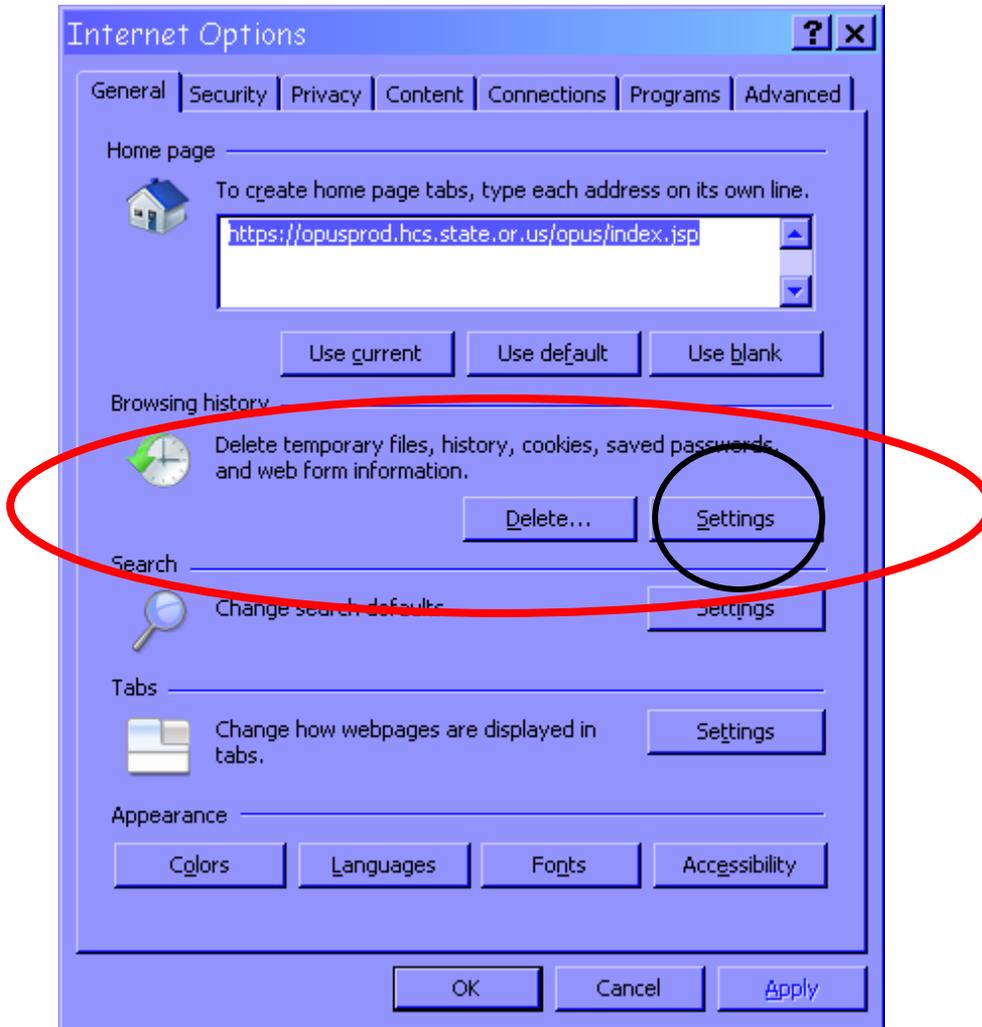
OPUS Helpdesk

Printing Problems – Probable solutions. While on the Internet (IE).



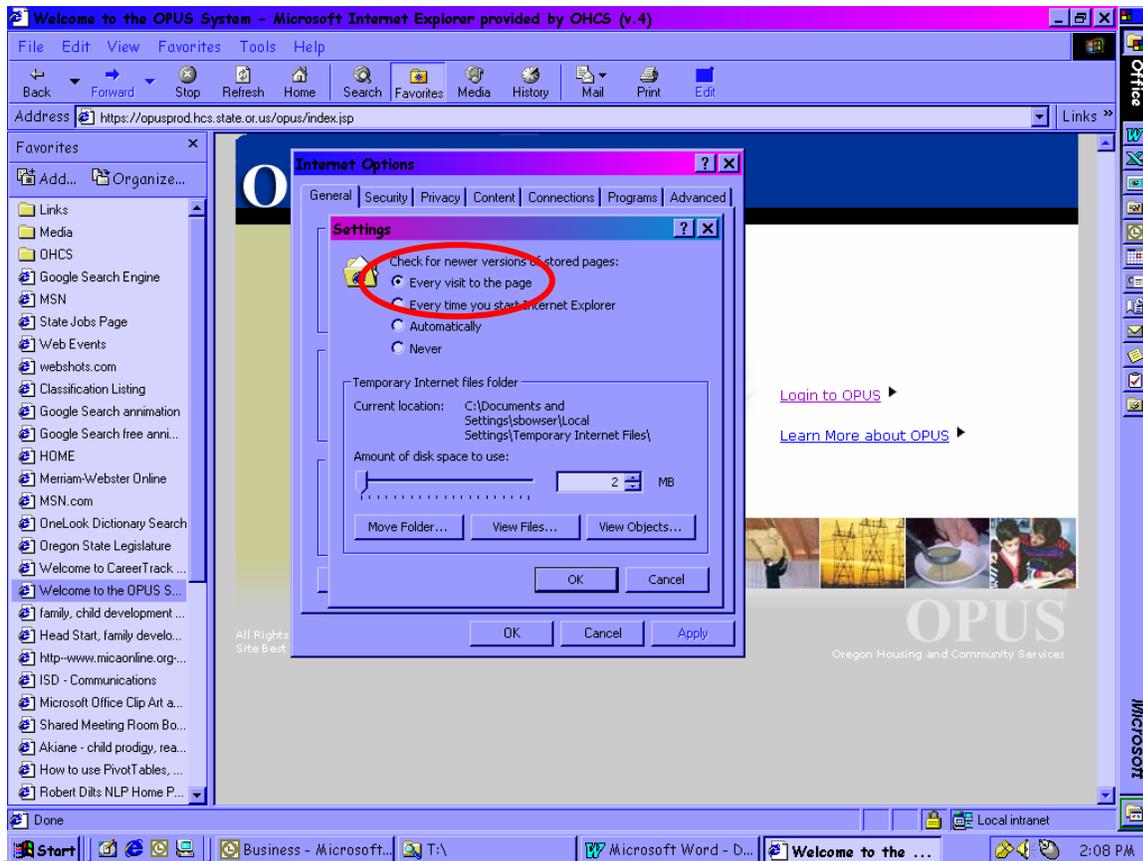
Using the toolbar at the top, go to “Tools” then go to “Internet Options”

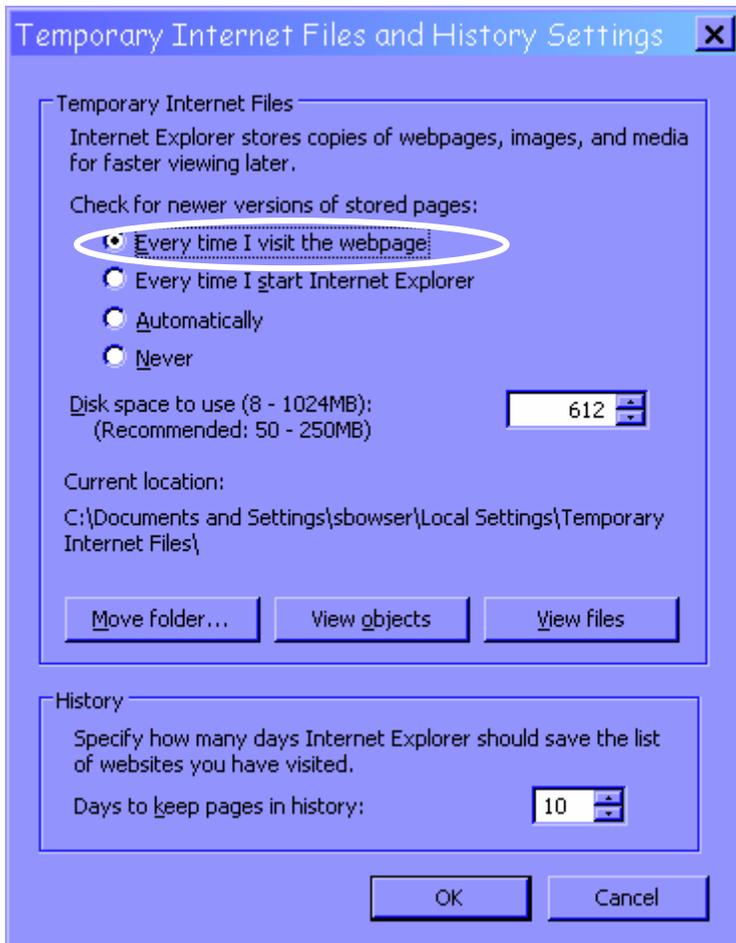




Under Internet Options, looking at the “General” tab, go to the middle of the window to “Temporary Internet Files”, click on ‘Settings’.

The settings should be: “Check for newer version of stored pages” “Every visit to the page”. Click “ok”.





Depending on the computer and IE settings, the 'Temporary Internet Files & History Settings' view can vary in appearance and/or wording.

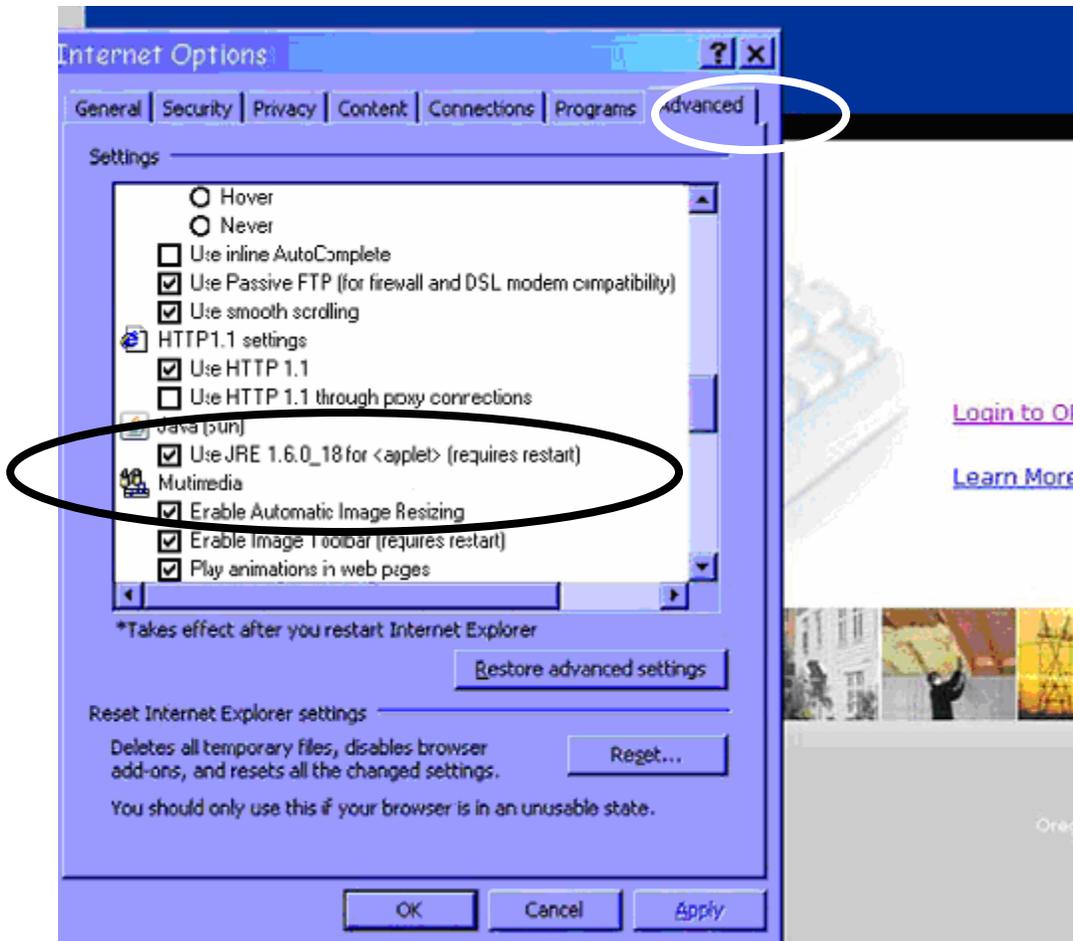
Regardless; the "Check for newer versions of stored pages:" Must be:

"Every time I visit the webpage".

Go to the "Advanced" tab. Look for "Java (Sun). If Java (Sun) isn't there, double check to see if Microsoft VM Java is checked. If so, this is where the printing problem is. The reports won't print properly with VM Java. Symptoms: pages print landscape and portrait, the print could be cut off or print would be scrambled.

Java (Sun) Java 1.6.0_07 is the latest program . Reference the listed link to access the Java page for quick access: <http://java.com>

If possible, each agency's IS staff should be able to assist the user(s) in downloading on each computer unit (PC). When downloading there will be two security certificates. See example below. The first one is the standard agreement to using the software, check "always". The second security certificate is for the report plug-in, again check "always".



This is the pop up after installation. This is OHCS security certificate



Java Security Update:

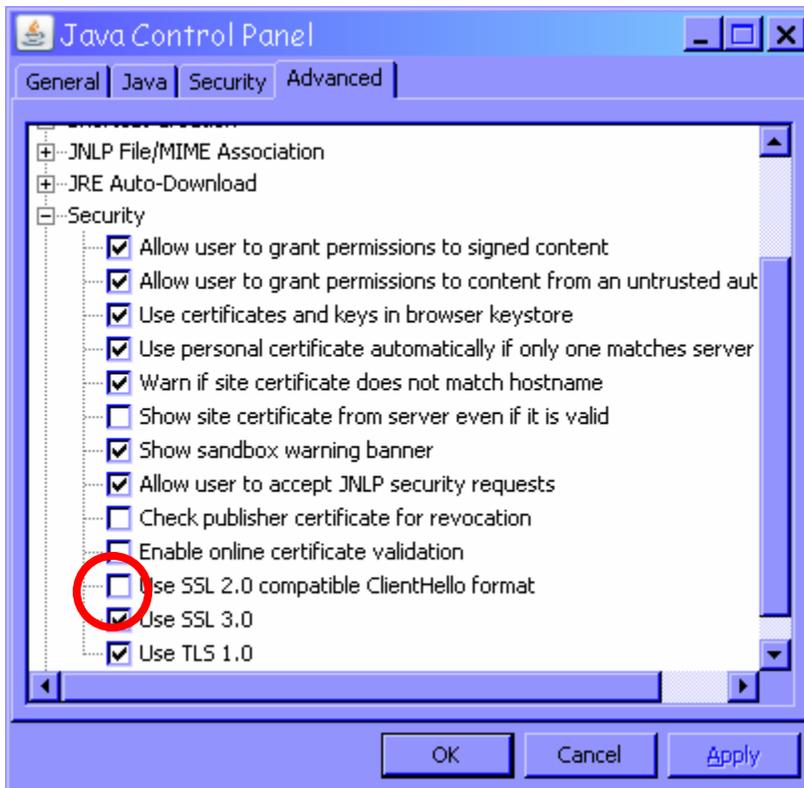
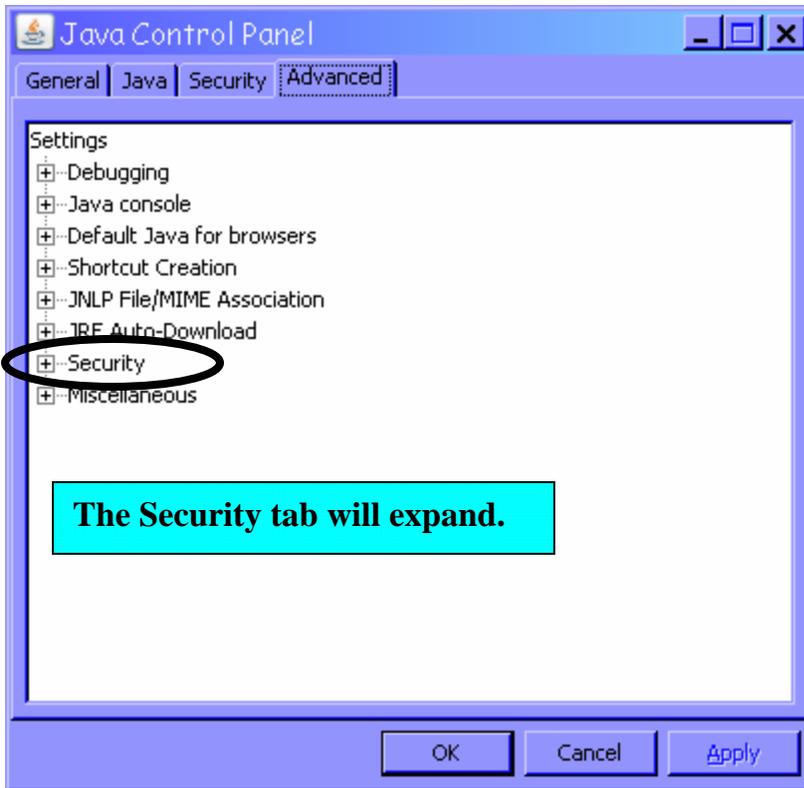
Make sure all your browser windows are closed before proceeding.

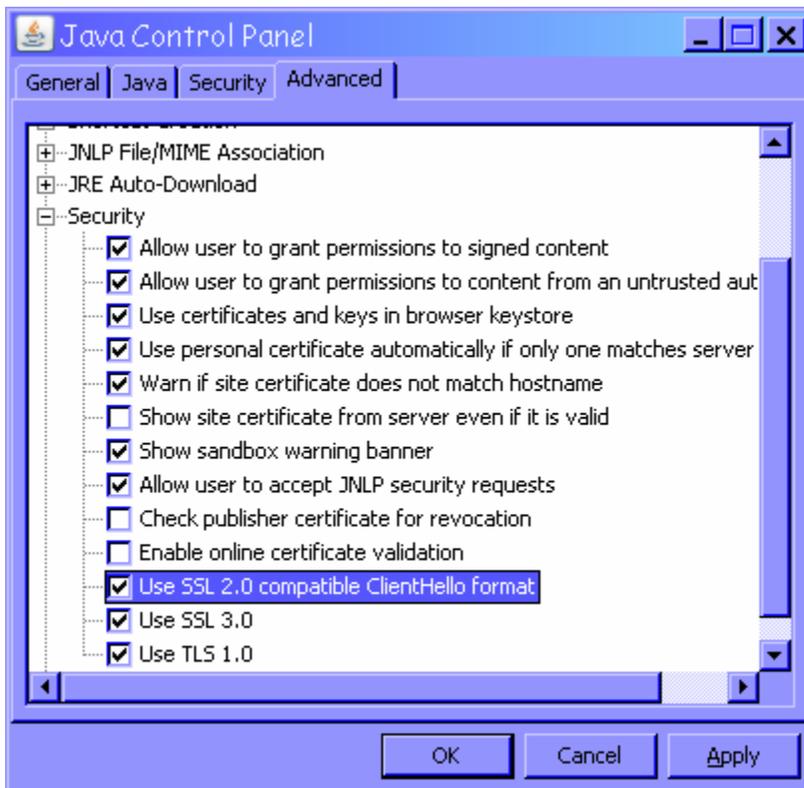
Go to: Start button (usually located in the lower left corner of your monitor), go to ‘setting’, to ‘control panel’.

If you are already in classic view skip this step. In the upper left corner of the screen click on ‘Switch to Classic View’.

Double click on the Java Icon.

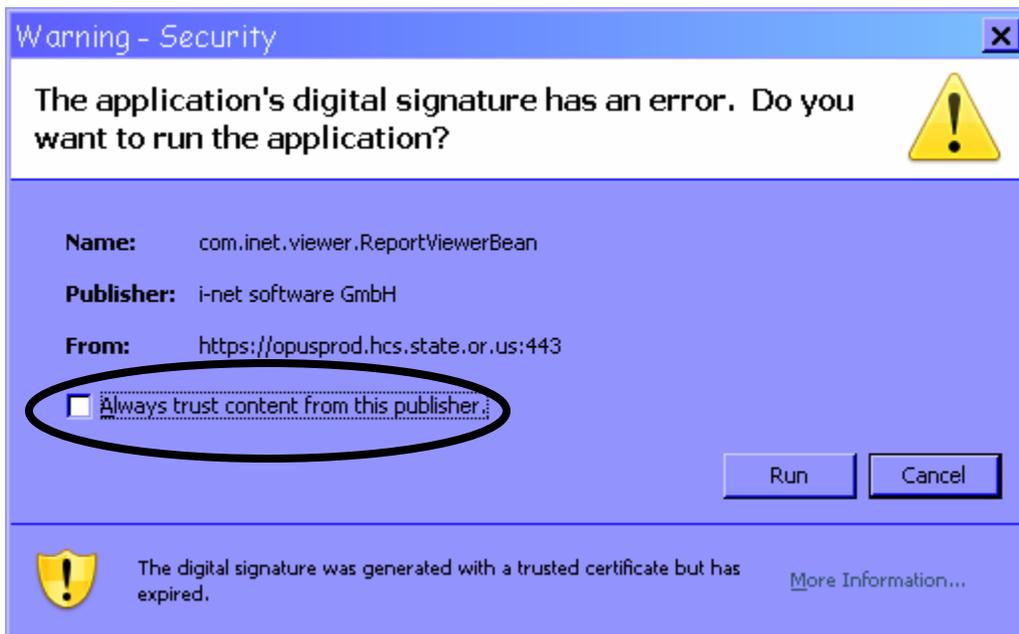




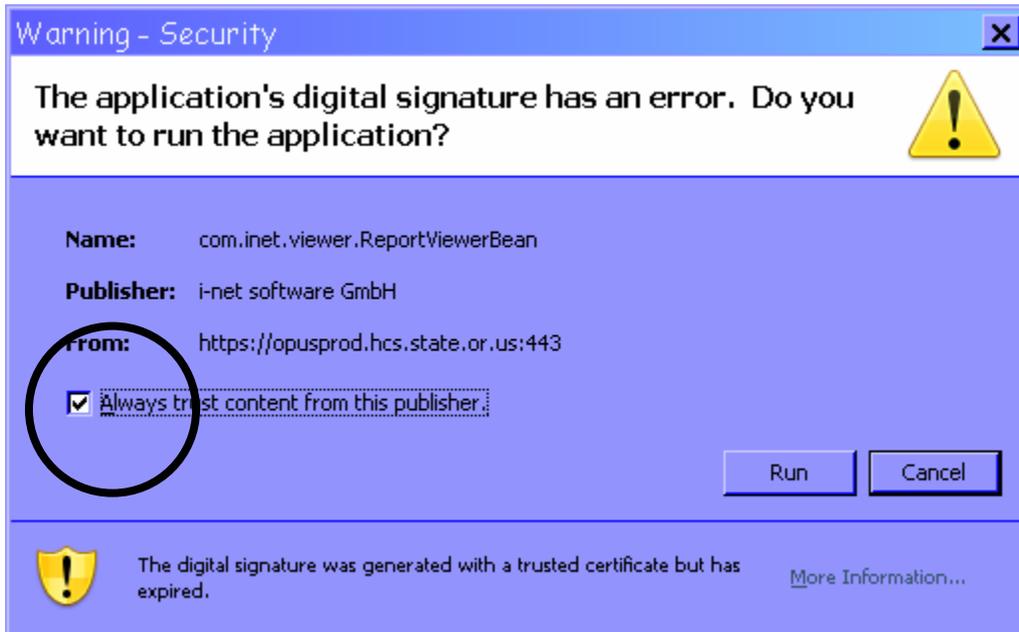


Check the box highlighted above. Click on “Apply”, then “OK”.

Log into OPUS normally and run one of your reports,. You should receive this pop up.



Click on “Always trust content from this published.”



Click on the “RUN” button and wait for the system to complete the process. Then you should be able to review your normal print window.

If you have any questions and if you have an IS person at your agency, ask for their assistance or contact

OPUS HelpDesk
opushelp@hcs.state.or.us
1-800-453-5511 Option #6

Create System ID Number - Manual Creations Procedures

The following information is provided concerning how to generate a manual System ID number.

CLIENT INFORMATION FOR PURPOSES OF THESE INSTRUCTIONS

NAME: Johnathan Paul Smith

DATE OF BIRTH: July 1, 1955

Normally, a System ID is created by OPUS (or can be manually done): SYSID sequence is as follows: "S" + first six letters of the clients first name + month,day,year(MMDDYY) of the clients birth date.

OPUS Energy Assistance Agency: OHCS HOME | Log Out
Client | Program | Fiscal | Management | Reports | Help
Version 2.8.2T

Client Search New Active

New Client Information (Fields marked with * are required, wildcards will be removed)

First Name JOHNATHAN * DOB 07-01-1955 *MMDDYYYY
Last Name SMITH * Create ID
SSN/Sys# SJOHNAT070155 * Search

OPUS will search the database to find this client before creating a new record.

Timeout 9:45

Oregon Housing and Community Services All Rights Reserved | Site best viewed with Internet Explorer 5.5 SP2 or higher HOME | Logout

In the rare event that this duplicates another SYSID# in the system the SYSID must be created manually. The accepted practice for this situation is the following. Manually enter into SSN/Sys# (DO NOT USE CREATE ID BUTTON) the following sequence: "S" + first five letters of the clients first name + first letter of the clients middle name + month,day,year(MMDDYY) of the clients birth date.



Client

- [Search](#)
- [View](#)
- [New](#)
- [Edit](#)

Residence

- [View](#)
- [New](#)
- [Edit](#)

Household

- [View](#)
- [Mail/Ph Update](#)

Move

- [Client to HH](#)
- [HH to Residence](#)
- [Merge HH](#)

Client Search New

Active

New Client Information (Fields marked with * are required, wildcards will be removed)

First Name * DOB *MMDDYYYY

Last Name * ~~SEARCH ID~~

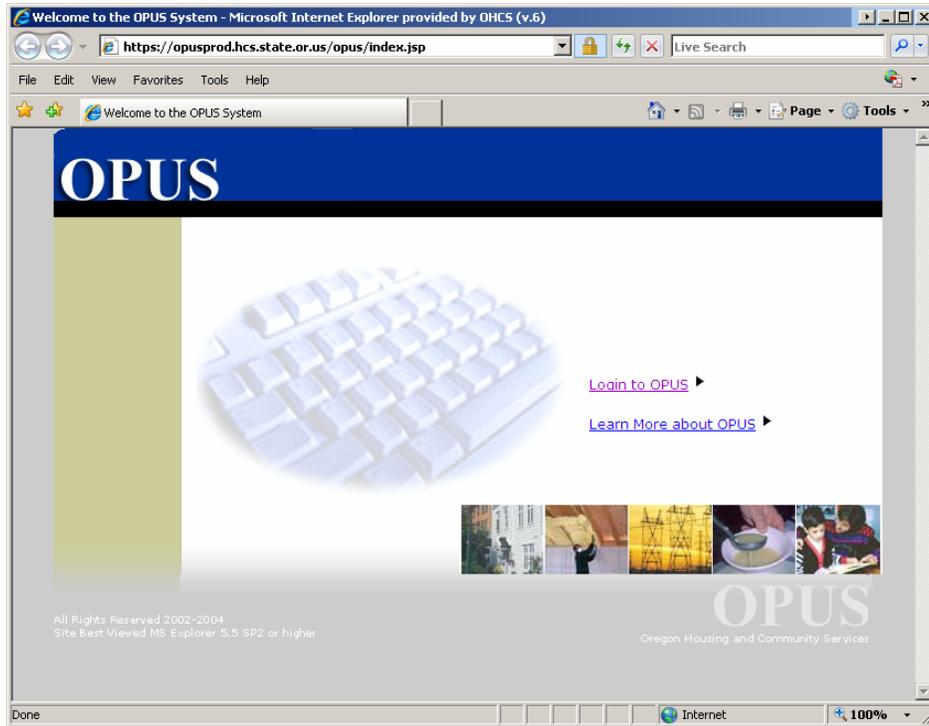
SSN/Sys# *

OPUS will search the database to find this client before creating a new record.

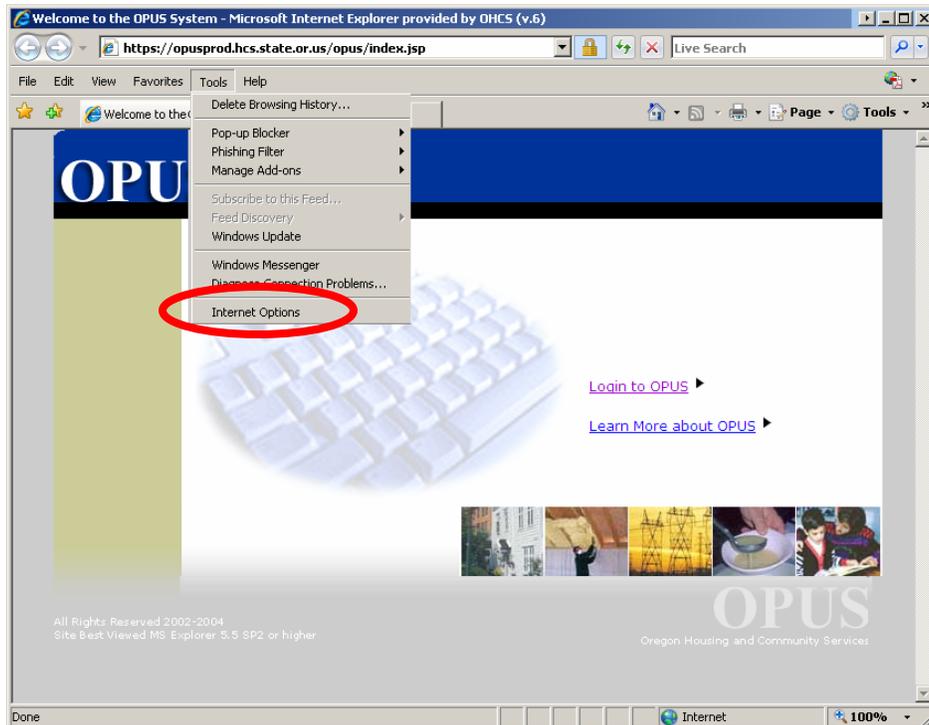
Timeout
19:00

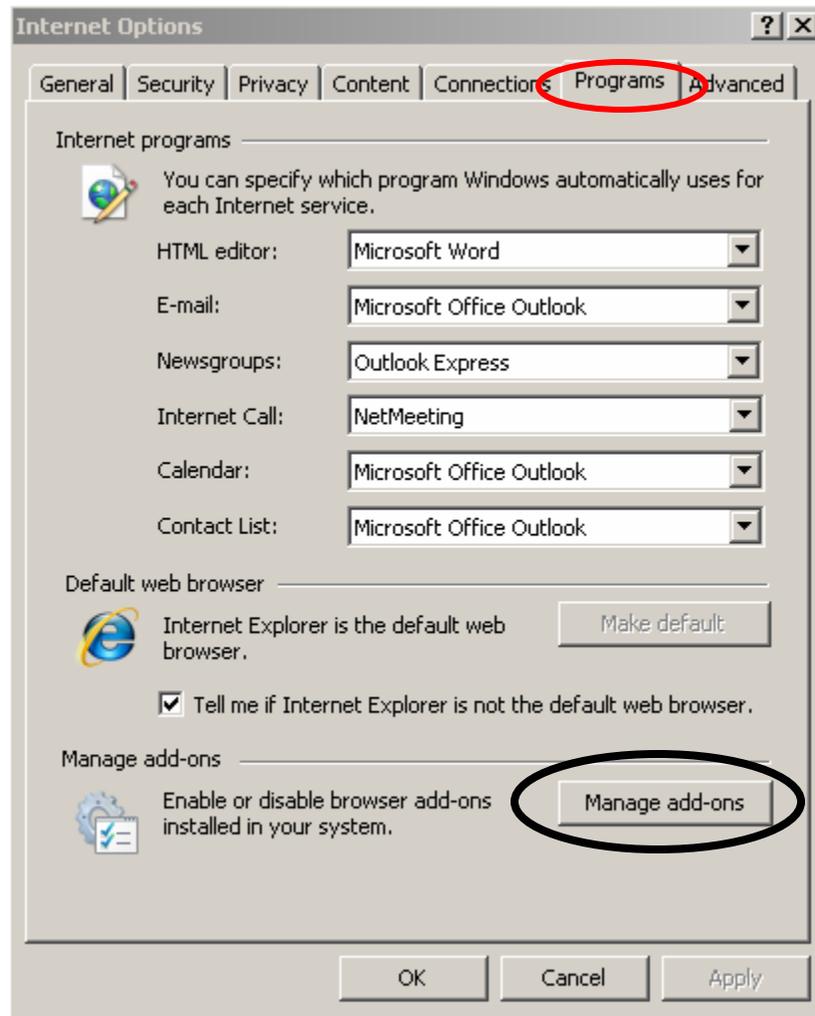
OPUS Helpdesk

Internet Explorer [ADD ON's](#) Problems – Probable solutions. While on the Internet (IE).



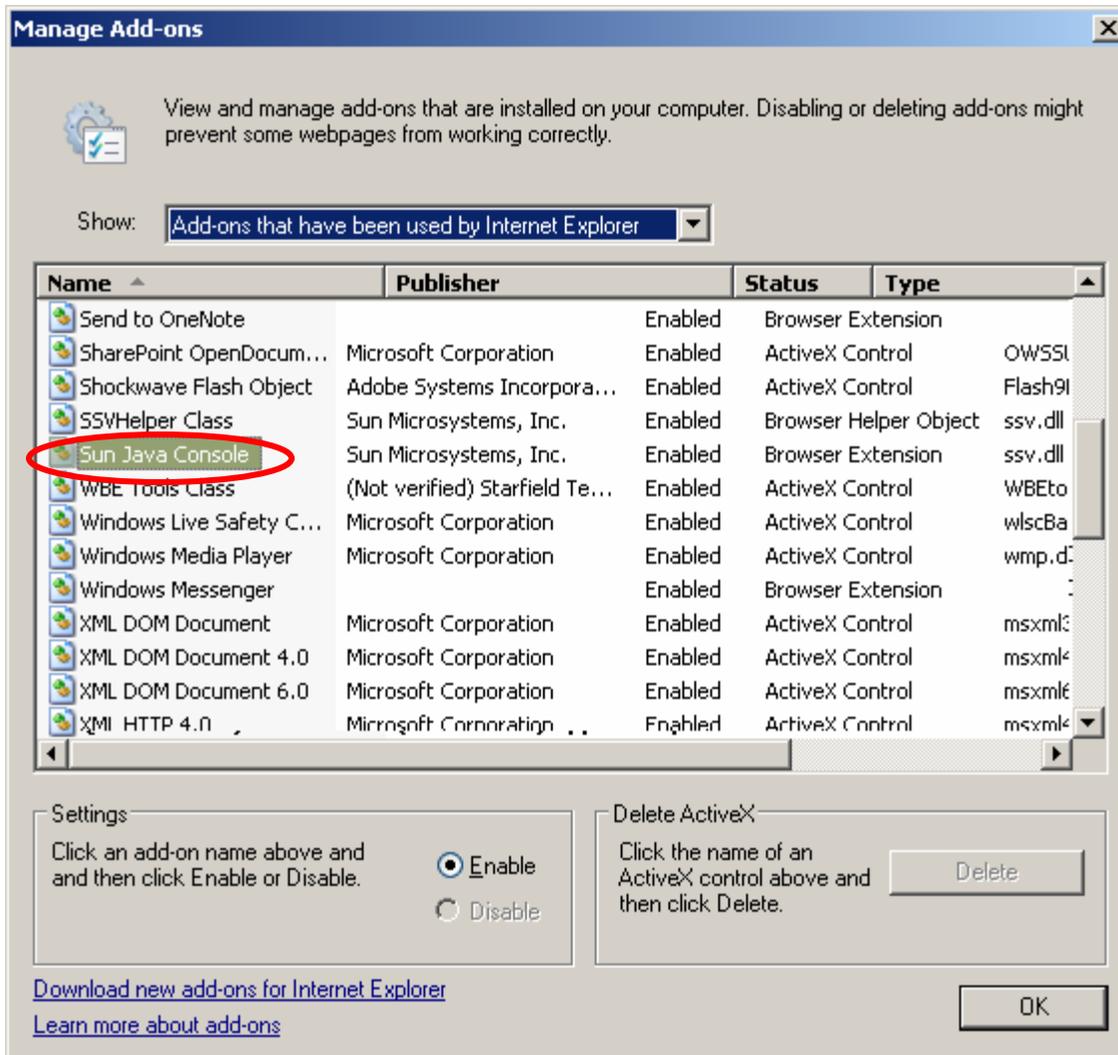
Using the toolbar at the top, go to "Tools" then got to "Internet Options"





Click on Manage add-ons.

Here is the actual add on manager and this picture also shows the Java Console. It should be enabled.



[WEBSITES](#)

OAISIS Home Page (OPUS Production Database or OPUS Test Database)
<http://oasis.state.or.us/>

OPUS Information Site
http://www.oregon.gov/OHCS/OPUS_Main_Page.shtml

THE BELOW WEBLINKS ARE OBSOLETE AND SHOULD NOT BE USED.

OPUS System (Production Database)
<https://opusprod.hcs.state.or.us/opus/index.jsp>

OPUS System (Test Database)
<https://opusprod.hcs.state.or.us/opustest/index.jsp>

SYSTEM SETUP:

Hardware and Software Requirements

To operate the OPUS web-based system, you will need the following computer setup:

- Windows XP or better Operating System
- A color monitor capable of at least 800 X 600 resolution.
- Internet Explorer 6.0 or better - Browser Software (free)
- Adobe Acrobat Reader 7.0 + (free)
- Mouse
- Internet connection, DSL or better (256 mps)
- Keyboard

The OPUS program is best viewed on a computer monitor with a screen resolution set to 1024 x 768 pixels (800 X 600 at a minimum). The higher resolution allows the screen to include more screen information and minimize the need for scrolling. The monitor resolution can be adjusted from the control panel.

Important: Always consult your computer's video card documentation before changing a monitor's settings. This ensures that both your computer's video card and monitor accept the resolution chosen. Otherwise, system problems may occur. If the settings are set above a maximum setting, your computer may have operation problems.

Setting Monitor Resolution

1. Right click the desktop, go to properties
2. The "Display Properties" window appears. Click the Settings tab.
3. Choose a resolution of 1024 X 768 (800 x 600 at a minimum) in the
4. "Screen Area" or "Desktop Area" section. If changing the monitor resolution causes system problems, you may be able to resolve the problems by restarting your computer in safe mode. Once in safe mode, you can reset the resolution to its original setting and restart your computer normally.

Microsoft Internet Explorer

OPUS is specifically designed to be used in Microsoft Internet Explorer 6.0 or higher. Download the Internet Explorer from www.microsoft.com. Choose Internet Explorer 6.0 or higher.

Once the download is complete, you will be prompted through a series of steps to install the software and restart your computer to complete the install process.

Adobe Acrobat Reader (for Reports)

OPUS has several information publications and or manuals associated with it that require the free Adobe Acrobat Reader software. These publications run as a portable document file (.pdf) format and some can only be viewed using the free Acrobat Reader software.

Download the latest version of Adobe Acrobat Reader, from <http://www.adobe.com/products/acrobat/readermain.html>.

Java SE Runtime Environment

OPUS generates several reports using the free Java SE Runtime Environment software. Most reports run and some can only be viewed using the free Java SE Runtime Environment software.

Download the latest OPUS compatible version of Java SE Runtime Environment from the associated link on the OPUS Information Site at http://www.oregon.gov/OHCS/OPUS_Main_Page.shtml

REQUIRED DOCUMENTATION FOR ALL OPUS SYSTEM ADMINISTRATORS

This is the absolute minimum documentation required. Please consult your own agency's internal policy for an additional requirement.

1. OPUS System Administrator Agreement.
 - A) Original – Send to Oregon Housing and Community Services
 - B) Copy 1 – Maintain a copy for your records and review/audit.

2. User Policy, Responsibility, & Code of Ethics (for the OPUS Administrator). Must be signed on an annual basis.
 - A) Original – Send to Oregon Housing and Community Services
 - B) Copy 1 – Maintain a copy for your records and review/audit.

2. User Policy, Responsibility, & Code of Ethics (for all users within your agency – this includes your subreceptients). Must be signed on an annual basis.
 - A) Original – Maintain at your agency.
 - B) Copy 1 – Goes to OPUS User.
 - C) Copy 2 – Maintained at subreceptients locations (if applicable).

RECOMMENDED RESPONSIBILITIES:

OPUS System Administrator - Creates New Users / Activates Disabled Users. Assigns Roles and Responsibilities for Program Managers Only in accordance with instructions from there agency director.

Program Manager (HMIS-CoC, E2C2, FISCAL, LIEAP-OEA, WX, etc) – Assigns Roles and responsibility based on work assignment and demonstrated competency. Notifies the OPUS System Administrator as needed when users accounts need to be created and or disable.

OPUS User – Operates in compliance with the user policy, responsibility, & code of ethics. Signs document annually and gives original to the agency's OPUS System Administrator. Reports any violation to the appropriate Program Manager.

