

HANDOUT 16

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SUBJECT Address/Contact Maintenance External User - OPTIS	APPROVED BY /s/ Marsha Hoskins		
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PURPOSE

To enable external OPTIS users to manage agency information for themselves and/or their agency.

GENERAL INFORMATION

External User = Non RPTD staff member who has OPTIS privileges

Internal User = RPTD staff member who has OPTIS privileges

When an agency is initially registered in the OPTIS system, information about the agency and its individual users is entered. This profile information may be updated when changes occur. The ability to change information is dependent upon the role, class, and privileges for a particular user.

The first external user registered with a provider automatically becomes the primary contact and is assigned the class of "Manager, Restricted." This primary contact has the most external user privileges to maintain OPTIS information for the provider and its users. This person is not necessarily the authorized representative or signatory for the agency.

The primary contact may register subsequent users for their agency. These "Registered System Users" are given privileges by the primary contact and are assigned the class of "User, Restricted" or "Manager, Restricted."

Registered system users have access rights, and the ability to respond and browse as a representative of the provider, but cannot change or modify the provider information or profile. They may create requests for reimbursement or periodic reports if the primary user has given them that privilege.

An external user not currently affiliated with a provider in OPTIS ("Anonymous Browser") may self-register and seek affiliation with a provider within OPTIS. The primary contact for the provider will then accept or reject this new user.

GUIDELINES FOR CHANGING INFORMATION IN OPTIS

- *Provider Information* may be changed only by the primary contact for the organization or by Rail and Public Transit Division (RPTD) staff on their behalf.
- *User Information* (with the exception of the primary contact's information*) may be changed by the primary contact, by users, or by RPTD staff.

*Note: To keep RPTD informed of changes to key personnel, the Primary Contact must submit a written request to RPTD for changes to his/her user information.

- *Primary Contact (the person)* may be *changed* by the current primary contact.
- *Primary Contact (the person)* may be *deleted* only by RPTD staff.
- *Primary Contact Information (name, address, email, phone #)* may be changed only by RPTD staff.
- *New users* may be added or deleted by the primary contact or by RPTD.

VALIDATION FOR eRESPONSE INFORMATION

To maintain the confidentiality of external OPTIS user information stored in the system, internal

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validation, “eResponse” keyword issuance, and passwords are required for any user with those privileges.

The validation process begins when a user is initially registered. In order for the new user to complete documents, the “Electronic Response” option at step 1 of the Registration Wizard is selected. RPTD staff must then approve the request and change the user's status to “Authenticated for eResponse.” If the user is the authorized representative for his or her agency with signature authority, RPTD will also generate and send a unique “eResponse” keyword to be used as a secure, coded “signature” by that person when completing documents such as quarterly reports and reimbursement requests.

ADDRESS INFORMATION

When changing an address, it is important to note that the new address will apply from that time onward for future documents. The change does not alter documents previously created. Consider all the ramifications of changing data in OPTIS such as who uses the information, which documents will be affected by the change, and if any current documents will need to be modified due to the change.

REFERENCES

OPTIS Glossary: <http://www.oregon.gov/ODOT/PT/resources/optis/glossary.pdf>

RPTD Website: <http://www.oregon.gov/ODOT/PT/>

OPTIS User Settings / Privileges: See paperclip

DEFINITIONS

Navigation Menu: Main list of options and program features available to a user. This list appears at the far left of the OPTIS Home screen in the grey area. Navigation menus will display different features for different user roles.

OPTIS: Oregon Public Transit Information System

User Types:

- **Anonymous User:** Any person who accesses OPTIS – has privileges limited to browsing open notices and beginning the self-registration process.
- **Primary Contact:** OPTIS user with most external user privileges and who maintains OPTIS information for the agency and its users.
- **Registered System User:** A person set up in OPTIS with a profile (name, phone number, etc.) – may or may not be validated for eResponse.

Validated for eResponse: A user status within OPTIS which allows a user to submit electronic information safely. Requires a unique eResponse keyword provided by RPTD.

PROCEDURES

► FOR PRIMARY USER ◀

To change *agency* information (address, phone, email address, etc.):

ACTOR	ACTION
Primary Contact	1. Select “My Provider Details” from the OPTIS Navigation Menu. Select “Office Information.”
Primary Contact	2. At the Provider Information screen, add to or change agency information as needed. (Name, DBA, Class, Phone, Fax, Cell, Toll Free, Email, Website, State, Address, Primary Contact)
Primary Contact	3. When finished, click “Submit” to save the changes.

To change *user* information (title, name, password, status only):

ACTOR	ACTION
Primary Contact	1. Select “Users” from the OPTIS Navigation Menu. Select “Users” again to display the Authorized Personnel screen.
Primary Contact	2. At the Authorized Personnel screen, from the list of users which appears, select the user for whom a change is needed.
Primary Contact	3. At the Edit User screen, add to or change user information as needed.
Primary Contact	4. When finished, click “Submit/Remain” to save and refresh the screen or click “Submit/Return” to save and return to the Authorized Personnel screen.

To add a user to your agency, Option 1:

ACTOR	ACTION
Primary Contact	1. Select “Users” from OPTIS Navigation Menu, select Users again to display the Authorized Personnel screen.
Primary Contact	<p>2. Click on “Add New User” button and key in new user information, beginning with user name.</p> <p>For consistency, RPTD has set up a naming convention for user names. User names are <i>not case-sensitive</i> and should :</p> <p>Be at least six letters long, and</p> <p>Consist of the first letter of the first name and the entire last name (e.g., mboals.)</p> <p>Note: If the user’s last name is shorter than five letters, use as many letters of the first name as needed to make the user name at least six letters. (e.g., Michael J. Fox’s user name would be micfox.)</p> <p>The OPTIS system has pre-defined password conventions. Passwords are <i>case-sensitive</i> and must:</p> <p>Be at least six characters long, and</p> <p>Contain two or more pattern characters.</p> <p>The four pattern characters are: upper-case letter, lower-case letter, numeral, and symbol. Password examples: <i>Password9</i> (three pattern characters - upper-case letters, lower-case letters and a numeral,) <i>maile61</i> (two pattern characters - lower-case letters and numerals.)</p>
Primary Contact	<p>3. Make sure the status selected is “Registered.” Select “Find” to find your agency. Select the agency to affiliate this person with. Click “Submit/Return” to save the changes and return to the Authorized Personnel screen.</p> <p>Note: this procedure adds a user with limited access and browsing rights. This person will not be able to change or modify company information or profile. To enable a user to request reimbursement or create documents, choose “Validated for e-Response” from the drop-down menu. Email a request for an eResponse keyword to the OPTIS administrator.</p>

To add a user to your agency, Option 2:

ACTOR	ACTION
Primary Contact	1. Instruct the new user to self-register following the “New User” steps below.
New User	2. Access OPTIS: http://www.oregon.gov/ODOT/PT/Pages/resources/optis.aspx
New User	3. Click on “Provider Registration”. Check both boxes on the eServices Information page. Click Next.
New User	4. Click “I Agree” after reading the OPTIS security agreement.
New User	<p>5. Complete the Personal Information page, being sure to fill out all required fields marked with an asterisk, including user name and password.</p> <p>User name convention: User names are <i>not</i> case-sensitive, should be at least six letters long, and consist of the first letter of the first name and the entire last name (e.g., mboals.)</p> <p>Note: If your last name is shorter than five letters, use as many letters of your first name as needed to make your user name at least six letters. (e.g., Michael J. Fox’s user name would be micfox.)</p> <p>OPTIS passwords <i>are case-sensitive</i> and must be at least six characters long, and contain two or more pattern characters. (The four pattern characters are: upper-case letter, lower-case letter, numeral, and symbol.)</p> <p>Password examples: <i>Password9</i> (three pattern characters - upper-case letters, lower-case letters and a numeral,) <i>maile61</i> (two pattern characters - lower-case letters and numerals.)</p> <p>Click Next.</p>
New User	6. Review the “Person Confirmation” screen. Click Next.
New User	7. Enter your organization name in the name box; click Submit.
New User	8. A list of possible matches to your search appears. Check the box of the organization you wish to be affiliated with. Click Next.
New User	9. Review the requested affiliation. Click Next.
New User	10. Skip the Profile Setup screen by clicking Next.
New User	11. Review your Registration Summary. Click Finish.
Primary Contact	12. Log into OPTIS. You should see a note that there is an Affiliation Request Pending. Select Users from the Navigation Menu. Select Affiliation Maintenance.
Primary Contact	13. If you wish to add the person seeking affiliation to your agency, check the Approve box. Click Submit. The person is now affiliated.
Primary Contact	14. Return to Users and select the new user by clicking on his or her underlined name. If you want this person to be able to create documents, change his or her status to “Validated for eResponse” and click Submit/Return.

To delete a user:

Primary Contact	Select Users from Navigation Menu, select Users again to display the Authorized Personnel screen, click on the check box next to the name of the user you wish to delete, click the Delete button. Note: the primary user cannot be selected for deletion; this is indicated in OPTIS by the color of the selection box which is “grayed out.”
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To delete or change primary contact information: Contact OPTIS Administrator

► FOR REGISTERED SYSTEM USER (not Primary) ◀

To change your *user* information (phone number, email address, or preferences):

ACTOR	ACTION
User	1. Select “My Profile” from OPTIS Navigation Menu. Select “User Information.”
User	2. At Information Maintenance screen, select “Edit Info” button to the right of the section you wish to modify. Add to or change information as needed.
User	3. Click “Submit/Return” to finish or “Submit/Remain” to refresh the screen.

To change your *user* password:

ACTOR	ACTION
User	1. Select “My Profile” from OPTIS Navigation Menu. Select “Change Logon Password.”
User	2. Type in current password. Type in new password. Confirm new password.
User	3. Click “Submit.”