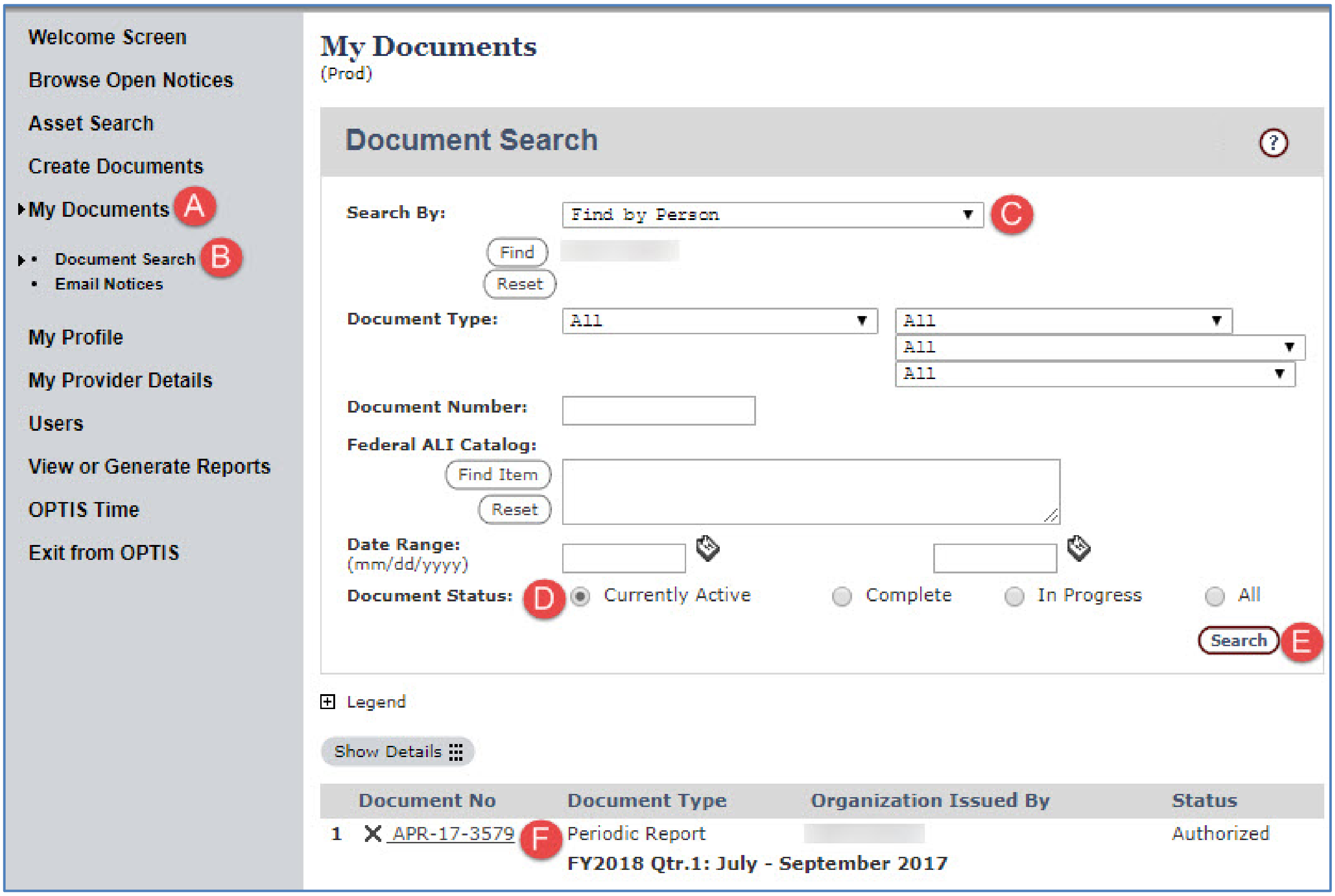
HANDOUT 7

OPTIS

How can I tell if there is something in OPTIS waiting for my action?

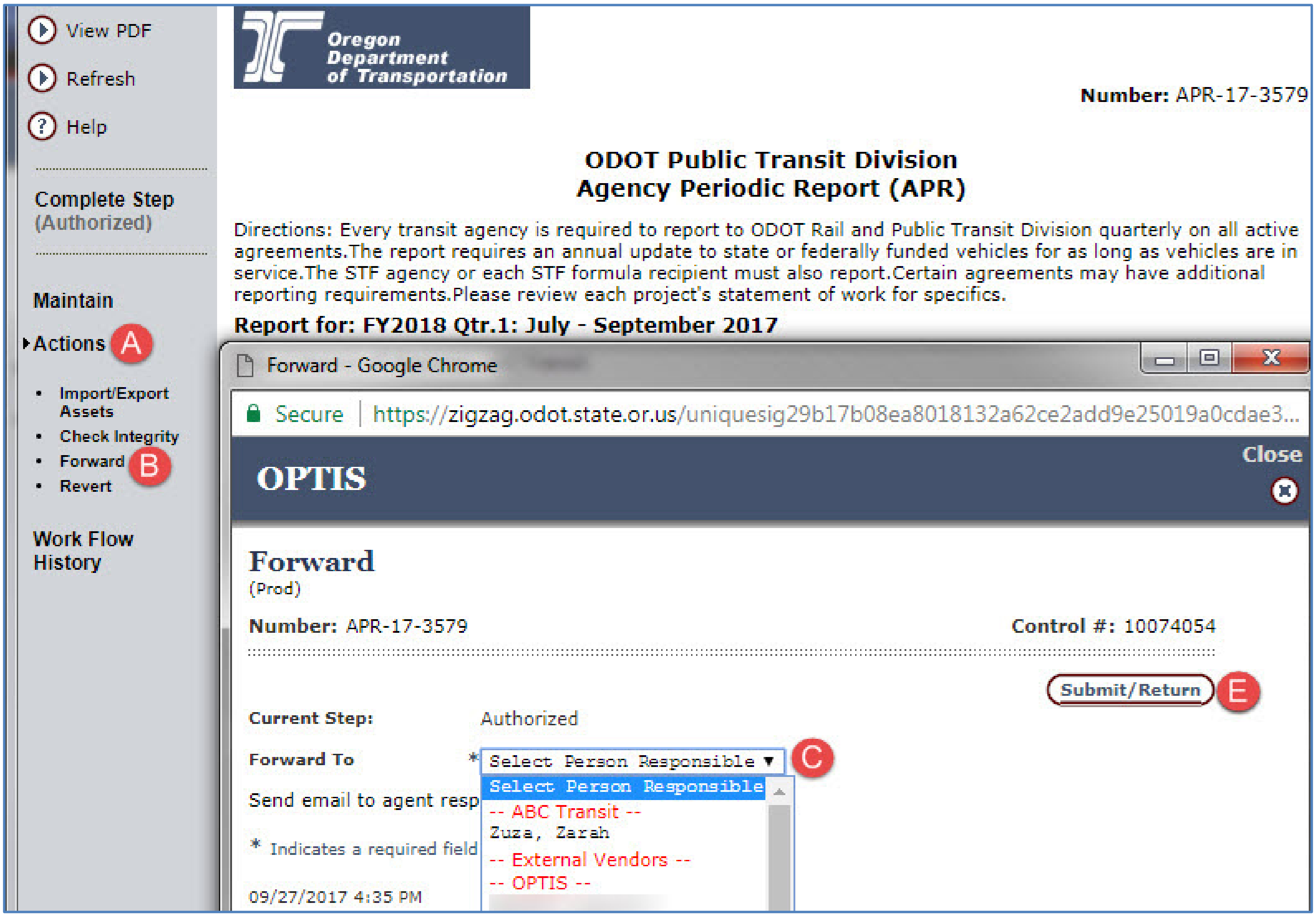
1. Check your email for a system message like "This OPTIS document has been forwarded to you."
2. Open OPTIS, log in and search for the document referred to in the email (or any other document you're wondering about). (See A and B in screenshot below.)
   a. Select "Find by Person" and select your name. (C)
   (If your name is not auto-filled, click the find, type your name, and select from search results.)
   b. Select "Currently Active" (D) Click "Search". (E)



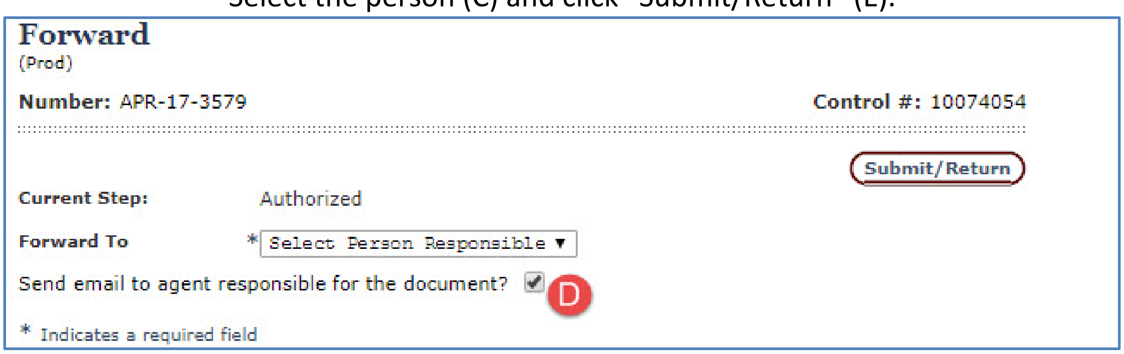
Note: The status indicates the step that the document is on. The document is not complete until the status says "Complete". (In example F, this APR is not complete.)

Forwarding

If you are a document preparer and need someone to review a document, you can forward it to them using the “Actions/Forward” feature. (A, B)

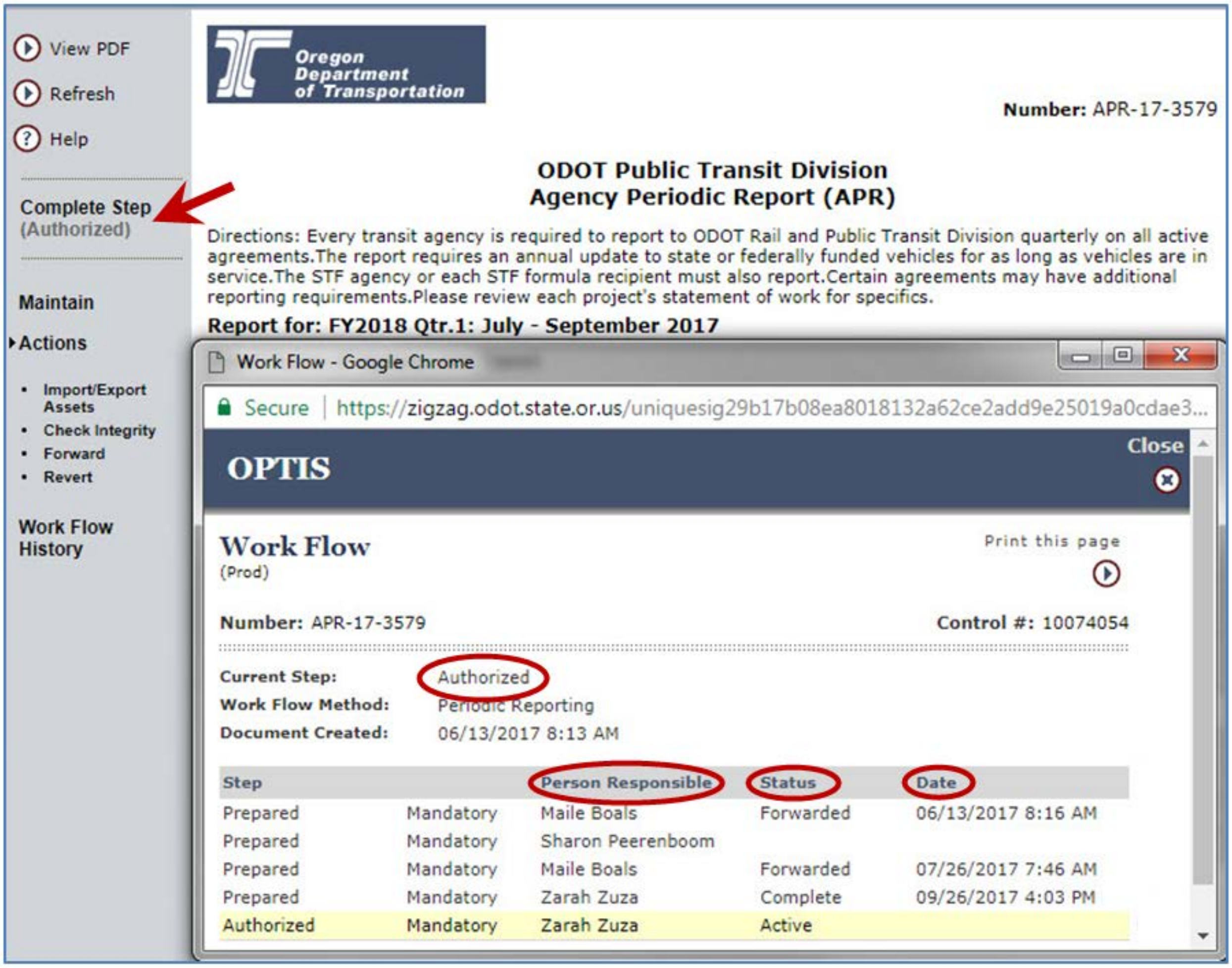


Select the person (C) and click “Submit/Return” (E).



If you want, check the box “send email to agent responsible…” (D) before clicking “Submit/Return” to generate an email to the person so they will know the document is in their queue.

Work Flow History



Current Step: Indicates creation and approval/authorization stages. The step will be "Complete" after it has been finalized.

Person Responsible: Shows who has been working on the document and in whose queue it is currently (Active).

Status: Indicates the different actions taken throughout the document's lifecycle.

Date: Indicates when steps and status changes happened.

Note:
In the screenshot above, you can tell that this document is active in Zarah Zuza's queue at the authorized step by the yellow highlighting, but that she has not completed the step. The words "Complete Step" in black text at the top left mean it is active in her queue. If a document is not in your queue, the text will appear grayed out.