

## 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)

The screenshot shows the 'My Documents' page in the OPTIS system. On the left is a navigation menu with items like 'Welcome Screen', 'Browse Open Notices', 'Asset Search', 'Create Documents', 'My Documents', 'Document Search', 'Email Notices', 'My Profile', 'My Provider Details', 'Users', 'View or Generate Reports', 'OPTIS Time', and 'Exit from OPTIS'. The main content area is titled 'My Documents (Prod)' and contains a 'Document Search' section. This section includes a 'Search By' dropdown set to 'Find by Person', a search input field, and 'Find' and 'Reset' buttons. Below this are 'Document Type' dropdowns, a 'Document Number' field, a 'Federal ALI Catalog' field with 'Find Item' and 'Reset' buttons, and a 'Date Range' field. At the bottom of the search section, the 'Document Status' is set to 'Currently Active' (marked with a red circle D), with options for 'Complete', 'In Progress', and 'All'. A 'Search' button (marked with a red circle E) is at the bottom right. Below the search section is a 'Legend' and a 'Show Details' button. A table at the bottom displays document information:

Document No	Document Type	Organization Issued By	Status
1 X APR-17-3579	Periodic Report		Authorized
FY2018 Qtr.1: July - September 2017			

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

**ODOT Public Transit Division Agency Periodic Report (APR)**

Directions: Every transit agency is required to report to ODOT Rail and Public Transit Division quarterly on all active agreements. The report requires an annual update to state or federally funded vehicles for as long as vehicles are in service. The STF agency or each STF formula recipient must also report. Certain agreements may have additional reporting requirements. Please review each project's statement of work for specifics.

**Report for: FY2018 Qtr.1: July - September 2017**

Step	Person Responsible	Status	Date
Prepared	Mandatory Maile Boals	Forwarded	06/13/2017 8:16 AM
Prepared	Mandatory Sharon Peerenboom		
Prepared	Mandatory Maile Boals	Forwarded	07/26/2017 7:46 AM
Prepared	Mandatory Zarah Zuza	Complete	09/26/2017 4:03 PM
Authorized	Mandatory Zarah Zuza	Active	

**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.