Quick Reference FAQ

1. What permissions do I have in the system? How can I change those permissions?
   - What you can see will depend on the user class and privileges assigned. The primary user validated with eReponse can see all menu options, submit and create documents, change user and agency info, and add and delete users.
   - Someone who is not a primary user and not validated with eResponse can view agency information and menu, but can’t submit or change agency info.
   ♦ See Handout 16 and OPTIS User Guide Chapter 4 ♦

2. What documents should I attach to my reimbursement requests?
   - It varies. We’ve created an updated list for reimbursement request attachments.
   ♦ See RPTD Reimbursement Request Expense Documentation Requirements ♦

3. How can I tell if there is something in OPTIS waiting for my action? How do I know if something is completed and submitted?
   - Receive a system message email with the type of document that’s been forwarded. Can search under “My Documents” for person or document type.
   - If something is completed it will show on the left side “Complete Step” is grayed out completely. Made need to click twice. If you are not authorized to complete then select “Forward” and select the authorized user.
   ♦ See Handouts 7 and 8 ♦

4. What is the difference between my regular password and eResponse keyword? How do I submit a document using the eResponse keyword?
   - Regular password is used only when you log into OPTIS initially.
   - eResponse keyword is used as an electronic signature when authorizing documents. It confirms that a document is correct, and that the person submitting the document for the agency is the authorized representative.
   ♦ See Handout 3 ♦

5. What reports can I run in OPTIS?
   - Using the left navigation menu, select “View or Generate Reports” to view payment statement, sub-grant statement, and vehicle statement reports.
   ♦ See Handout 9 ♦
6. What assets must be entered into OPTIS?

- According to the State Management Plan for Public Transportation Programs, capital assets are tangible items with an aggregated purchase price of $5,000 or more, and a useful life of at least one year. All such assets must be entered into OPTIS by RPTD or transit agencies.

♦ See Handout 14 ♦

7. Where can I see all of my documents and agreements?

- Under “My Documents” select “Document Search” and search by a document number. There is an option on the left to ‘View PDF’ or you can select ‘Attachments’ to view signed copies.

- You can also use the Overview screen to see all documents from one biennium in one place. Within an APR or reimbursement request, click “View Data” and “Overview”. Or in “Document Search” select “Find Overviews (Masters)”, click “Search”, and select the biennium you are interested in.

8. How can I tell if anyone from my agency has already started an APR or reimbursement request? How can I tell if a document is complete and ready for ODOT’s review? What do I do if there are incomplete or duplicate documents?

- In order to tell if you have incomplete or duplicate documents, use the “Find by Organization Hierarchy” search and choose the document type (APR or reimbursement request) you are looking for to see all of that type of document.

- Once a document is open, select ‘Work Flow History’ to see the step, responsible person, and status of a document.

- If you see several of the same document with an X icon, you know those documents have been started, but not completed. Any duplicates can be deleted by opening the document, choosing “Actions” and clicking “Delete” and “Submit/Return”.

♦ See Handouts 7 and 8 ♦

9. How can I practice in OPTIS?

- [https://zigzag.odot.state.or.us/](https://zigzag.odot.state.or.us/)
- OPTIS Train is in RED
- OPTIS Production is GREEN

10. How can I get training and more information?

- OPTIS Resource Page: [https://www.oregon.gov/ODOT/RPTD/Pages/OPTIS.aspx](https://www.oregon.gov/ODOT/RPTD/Pages/OPTIS.aspx)
- Support Analysts
- RTCs
- Email ODOTPTDReporting@odot.state.or.us