

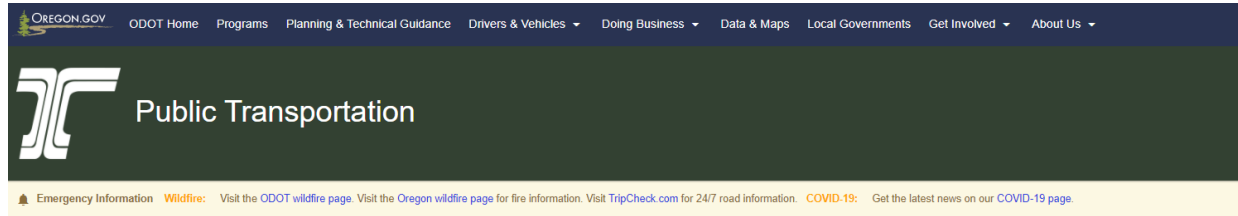
2. Getting Started

Accessing the OPTIS Program

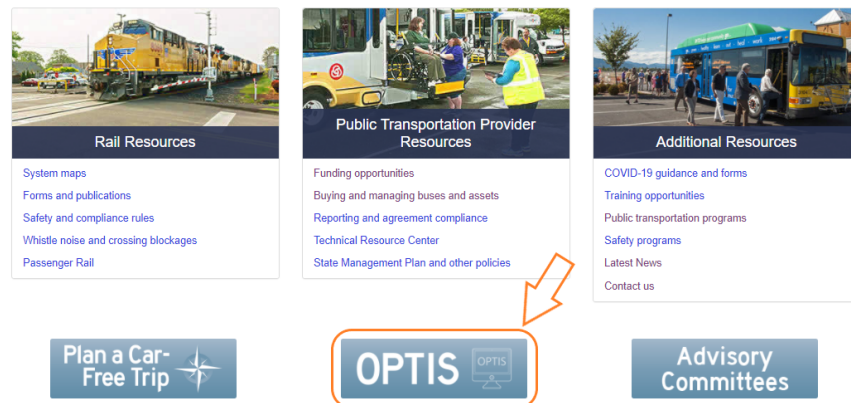
The easiest way to access OPTIS is to navigate there from ODOT's Public Transportation Division (PTD) main webpage and click the *OPTIS* button.

URL*: <https://www.oregon.gov/odot/RPTD/Pages/index.aspx>

(*Uniform Resource Locator – Global address on the World Wide Web.)



The Public Transportation Division website is undergoing changes to better align with our new organizational structure. Over the next few months, you can expect some pages and links to change to fit into the new structure. As we work towards full implementation, we will keep you updated, with a continued commitment to excellent service.



Click the *OPTIS button* to be taken to the OPTIS – Oregon Public Transit Information System page which has links to the OPTIS Production and OPTIS Training sites, as well as a wealth of other resources to help you get the most out of OPTIS.

Some of those resources include:

- OPTIS contacts
- OPTIS External User Guide
- OPTIS quick reference guides (APRs, provider reports, OPTIS statuses, etc.)
- Reimbursement request documentation requirements
- ODOT's direct deposit form
- Asset condition assessment spreadsheets
- PTD process flowcharts (assets, communication, document submittal, etc.)
- Links to other public transportation provider resources, such as guidance on reporting and agreement compliance
- And much more!

Click on the computer icon labeled OPTIS Production (Prod) to be taken to the OPTIS Home Page.

OPTIS - Oregon Public Transit Information System

Coronavirus (COVID-19)

ADDITIONAL RESOURCES

- Training Opportunities
- Public Transportation Programs Overview
- Public Transportation Division News
- Advisory Committees
- Transportation Resources for Car-Free Travel in Oregon
- OPTIS - Oregon Public Transit Information System**

PUBLIC TRANSPORTATION PROVIDER RESOURCES

- Funding Opportunities

OPTIS Access

Select the green "OPTIS Production (Prod)" icon to use the live site; select the red "OPTIS Training (Train)" icon to practice in the training site.

Access OPTIS Production



Access OPTIS Training



The Oregon Public Transit Information System, or OPTIS, is the web-based software that the Public Transit Section uses to manage grants. It automates and standardizes many transactions and serves as our system of record.

In OPTIS you can:

- Submit reimbursement requests
- Enter reporting data
- Track your grant activities
- Check agreement status
- Access payment histories, grant balances, and assets
- Run reports



HINT:

It might be beneficial to save the OPTIS Production Home Page link in the favorites bar or bookmarks of your preferred web browser for easy access.

OPTIS Home

OPTIS Production URL: https://optisprod-ordot.msapproxy.net/open_grants.dll/welcome

The OPTIS Home page may be accessed by anyone to review open grant application notices, however, only registered users may access the system's other features. The self-registration process is covered in Chapter 3 of this guide.




Most windows in OPTIS include a gray column on the left-hand side called the Navigation Menu. This menu changes depending on what type of user you are and where in OPTIS you are working. It is from this menu that you select where you want to go and what you want to do in the system. Each item in the Navigation Menu may be selected directly by clicking on it with your cursor:

- ◆ **OPTIS Home** takes you back to the home page.
- ◆ **Login to OPTIS** displays the login screen where, once you are registered, you can enter your username and password to log in to the system.
- ◆ **Provider Registration** takes you to the registration screen where users not already in the system may register.
- ◆ **Browse** takes you to current grant opportunities available through PTD.
- ◆ **How to disable your popup blocker** provides you with detailed instructions on how to allow pop-ups which may hinder your use of the system.



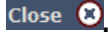
Other items located on the OPTIS home page have been labeled A - D for reference in the image above:

- A** The word in parentheses under OPTIS indicates which OPTIS site you are currently in. The system has two sites accessible to external users: Production (Prod) and Training (Train).
- B** Clicking on the word [OPTIS](#) generates a blank outgoing email message with the current

OPTIS administrator's email address automatically inserted. If you have questions about the system, you can complete the email and send it directly from within the system.

- C** Clicking on either the  icon or the words [Help for OPTIS](#) opens an OPTIS Help Desk entry related to the current page or topic. Help is available in many, but not all, locations. Some help entries may still be under construction.
- D** Clicking on the words [Contact Us](#) works the same way as clicking on the word [OPTIS](#) (B), initiating an email which can be send to the OPTIS administrator.

HINT:

While navigating OPTIS, if you wish to return to the previous screen, don't use the back arrow of the internet browser window. Likewise don't use the close button of the web browser to close the window. Instead it is better to use the buttons available within the OPTIS program. These buttons look like this:  **Back** or this:  or .

Logging Into the OPTIS Program

In order to log in to OPTIS, you must be a registered user. You may browse for grant opportunities without logging in to the system, but only registered users can enter OPTIS to view documents, submit requests for reimbursement, and create periodic reports.

Agencies and users not already in the system may self-register following the process described in this guide (Chapter 3. Registration.) However, it is important not to re-register if your profile already exists. Contact your OPTIS trainer or PTD if you need assistance determining your profile status.

To log in:

1. Navigate to the OPTIS Production site.
2. From the main OPTIS Navigation menu, click to select *Login to OPTIS*.

OPTIS or phone us at (503) 986-3300.'" data-bbox="114 662 921 857"/>

OREGON.gov

Oregon Public Transit Information System

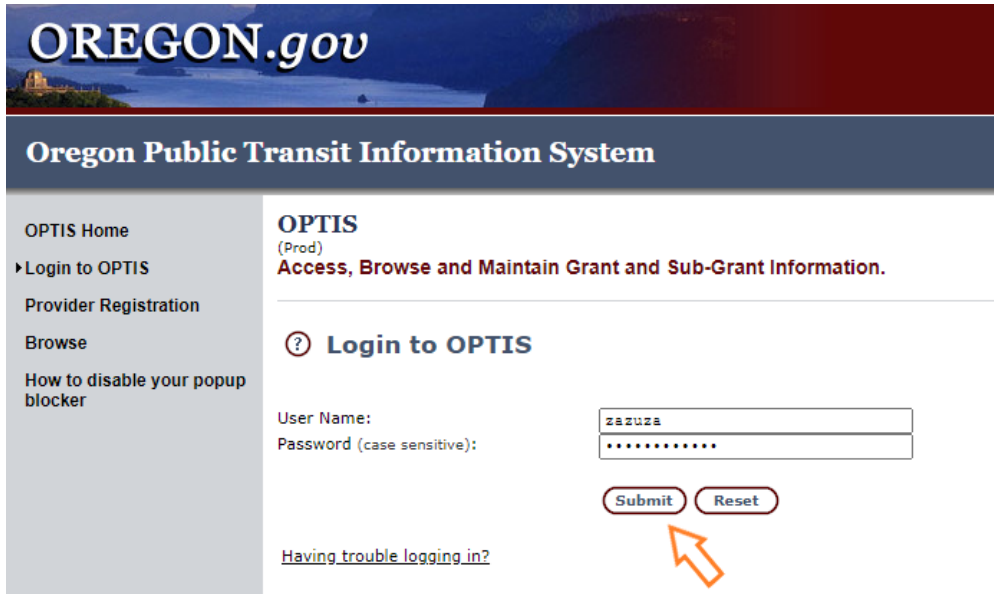
- ▶ OPTIS Home
- Login to OPTIS**
- Provider Registration
- Browse
- How to disable your popup blocker

Grant Management using OPTIS

OPTIS
(Prod)

If you have any questions about OPTIS, please send email to: [OPTIS](#) or phone us at (503) 986-3300.

- 3. At the Login to OPTIS screen, key in your user name and password in the appropriate boxes. Click *Submit*.

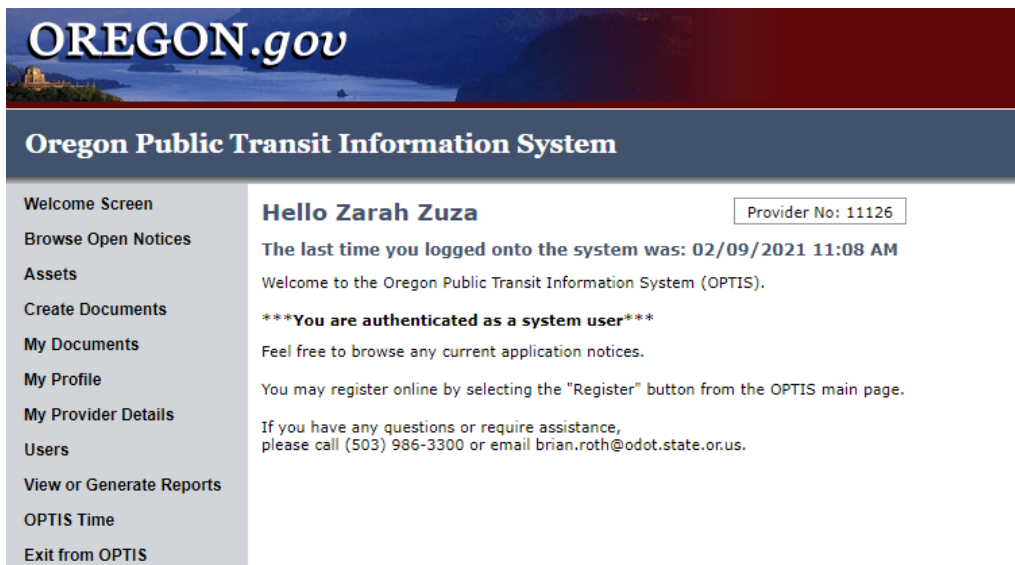


Note: User passwords are case sensitive. Your user name and password were defined when you registered; contact your OPTIS trainer or PTD if you are not sure if you have a user name and password or if you have forgotten them.

 **HINT:**

Press the <Tab> key to move from one text box to the next. Press <Shift> + <Tab> to move backward.

- 4. Upon successfully logging in you will be re-directed to the Welcome page. Available menu options for your roles and privileges are shown in the Navigation menu on the left side of the screen.



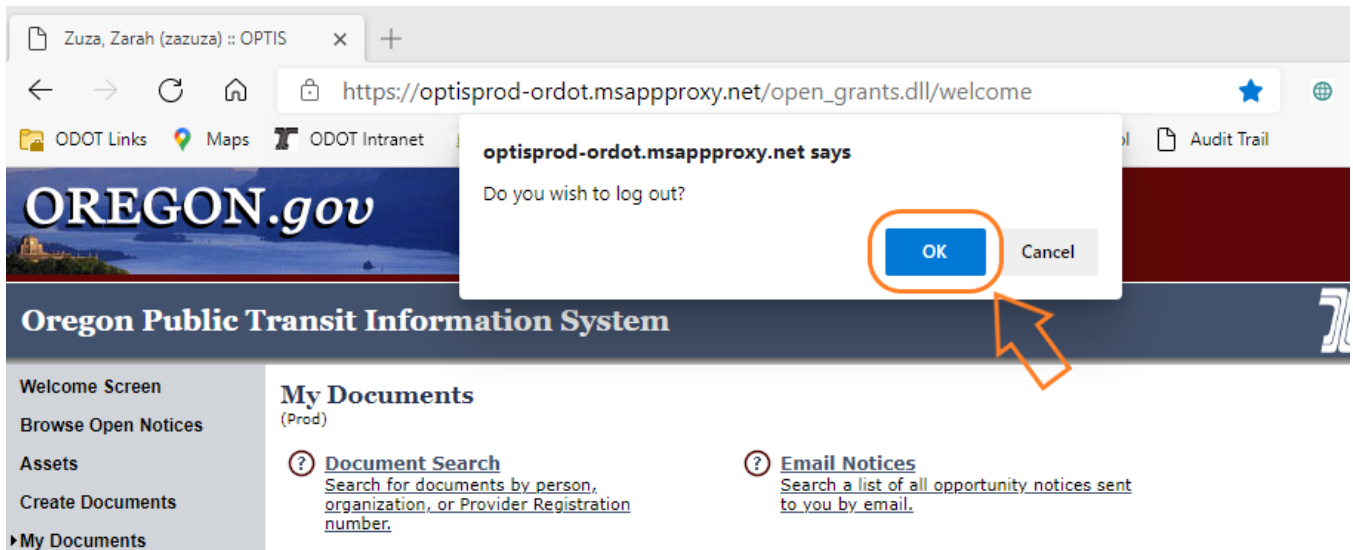
Logging Out of the OPTIS Program

When you are finished working in OPTIS, it is important to log out for security purposes.

1. From the Navigation menu on the left side of the screen, select *Exit from OPTIS*.



2. A pop up window may appear asking if you want to log out of OPTIS.



3. Click the *OK* button, or press the <ENTER> key. You are now fully logged out of OPTIS and will see the following screen:

