5. Searching for Documents

The OPTIS program offers many ways to locate the information you need. This chapter will cover basic search procedures. There are many different document types and the more you work with OPTIS, the easier it will be to know how to ask for what you need.

Document Types
Everything you create in OPTIS is considered a document. The following is a list of some key OPTIS document types:

Application Header	Application Project Detail
Application Project Header	Periodic Report
Project Header	Reimbursement Request
SPR Project	STIF Plan
STIF Plan Project	Sub-grant Agreement

Document Search
1. From the OPTIS Navigation Menu at the left side of the screen, select *My Documents*. Then select *Document Search* either from the Navigation Menu or the right main part of the screen.
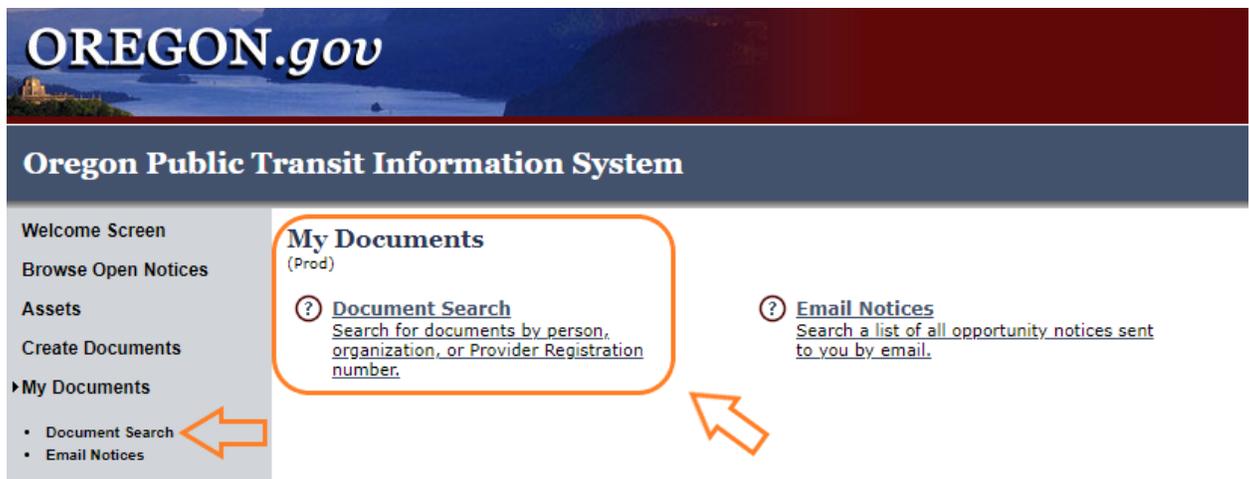
The phrase "My Documents" simply means documents that have something to do with you or your agency, whether you have created them or not.

2. The Document Search screen can be set to "Find by Person" in the "Search by" drop down and the current user's name.

3. Click the drop down arrow to see the entire list of options to "Search By/Find By".

Use "Find by Person" to find documents created by a specific user.
Use "Find by Document Title" to search for a document by whatever the creator named it.
Use "Find by Organization Hierarchy" to include all sub-agencies in your search.
Use "Find by Organization" to search by agency.
Use "Find by Document Number" to search for a document by a partial or exact match to the numerals in the document number.
Use "Find by Control Number" if you know the exact document control number for a particular document.

Deciphering the Search Results

When you run a successful search, you will be presented with results, and depending on your parameters, that could be none, one document, a handful, or a whole list. It may be too time consuming to open every document to find what you are looking for when presented with a long list. However, there are many helpful clues in the result listings that may tell you if this is the document you are looking for.

Document No	Document Type	Organization Issued By	Status
1 ✗ 192113965	f Reimbursement Request	Peanuts Transit	Issue
a b c	2017-2020 R4 5339 Peanuts Transit 77889		e
	d		

a. The first number is counting how many documents your search pulled and where this document ranks amongst them. By default, results will appear in chronological order, the most recent at the top. If you are seeking older documents, keep in mind you may have to click on the next page of results to find what you are looking for. Every page holds twenty results.

b. Document Status is illustrated with this symbol. It will tell you similar information as letter "e" further on. Click on the *Plus Symbol* next to the word Legend above the result list to see an explanation of statuses. In the example above and by using the Legend below, we can see this document is "Not Completed".
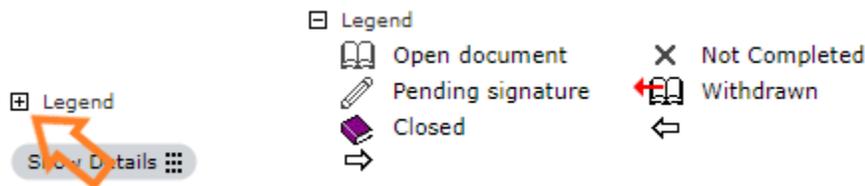
c. Document number will vary by document type. Reimbursement requests are a unique nine digit number. Agreements are a unique five digit number. Agency periodic reports follow the form APR-lasttwodigitsofthefiscalyear-fouruniquecharacters and likewise with SPRs.

d. Document Title is a descriptive text entered by the person who created the document. There are an unlimited number of possibilities for document titles, however they tend to follow the standard naming convention as above: biennium, ODOT Region, fund type, agency name, and agreement number.

e. The Status column, as with letter "b" above, is another place to see what status your document is in. Typical statuses include: Issue, Prepared, Complete, and Execute Agreement. Note: the term "Issue" is meant in the sense that you are "issuing a document," not that "there is an issue with it".

f. Document Type will tell you if the document is a Reimbursement Request, Agency Periodic Report, SPR etc. There are a limited number of document types.

Searching for Documents by Person

1. From the "Search By:" drop down list, select "Find by Person," as shown below. This is the default selection, so you may not need to use drop down list.
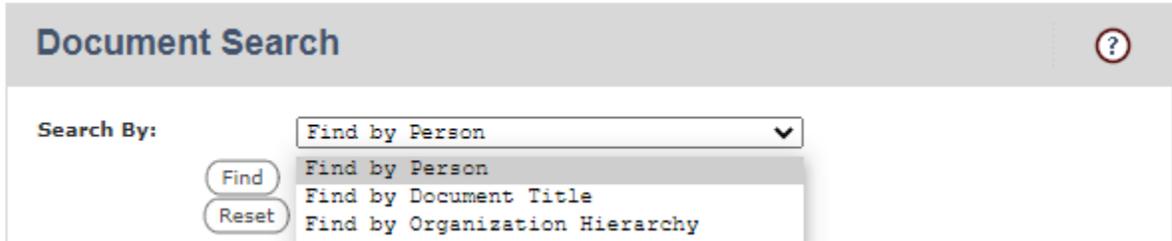
The person currently logged in is listed by default. If that's what you want, skip to step 4.

2. Click the *Find* button. The Person Inquiry window is displayed.
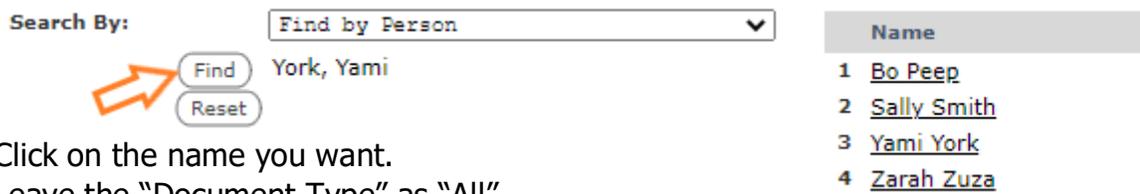
3. Click on the name you want.
4. Leave the "Document Type" as "All".
5. Note the four "Document Status" radio buttons.
   - "Currently Active" refers to documents that still have actions to be completed.
   - "Complete" refers to documents for which all steps have been completed.
   - "In Progress" refers to documents the current user had a part in completing.
   - "All" locates every document fitting the search criteria regardless of status.

If you are not exactly sure which status to select, use "All".

6. Click the *Search* button. A list of documents is displayed:

	Document No	Document Type	Organization Issued By	Status
1	✕ 192113965	Reimbursement Request 2017-2020 R4 5339 Peanuts Transit 77889	Peanuts Transit	Issue
2	✕ 192113963	Reimbursement Request 2017-2020 R4 5339 Peanuts Transit 77889	Peanuts Transit	Issue

7. Click the *Show Details* button. Additional details are shown for each document:

Note that the *Show Details* button has been replaced by a *Hide Details* button. You can click *Hide Details* button to simplify what is displayed.

8. Click on a document number to open a document.

Searching for Documents by Document Title

1. Select "Find by Document Title" from the "Search By:" drop down list. The screen changes as follows:

2. Type what you would like to search for. You don't have to type an entire word, just the first few letters.

3. Click the *Search* button. A list of all available documents with these characters in the title is displayed.
4. Click on a document number to open it.

HINT: Most places in OPTIS that allow searching will accept a search string (characters used as search criteria) as short as 2 characters. In these cases, you can use two spaces as criteria. Spaces act as 'wildcards' and produce a global list of items. This is especially useful when you aren't sure exactly what is available to search for.

Searching for Documents by Organization Hierarchy

An Organizational Hierarchy in OPTIS is a display of the relationships between organizations. The basic structure of organization hierarchies is an inverted tree. Each organization may be under only one organization, but may have multiple organizations below it.

If you are a lead agency with sub-agencies below you in the hierarchy, you may at times want to search for documents just for your agency and at other times for documents for all agencies associated with you. The "Find by Organization Hierarchy" options allows you to see a master list of all documents, including documents associated with all agencies in your hierarchy.

Choose "Find by Organization Hierarchy" from the "Search by" drop down list. Then select the "All" radio button from the "Document Status" list at the bottom of the dialog box. Click the *Search* button. The list produced using this method will be quite long, and will necessitate looking through many pages, but it can be useful in some situations.

Searching for Documents by Organization

This search option allows you to search for any type of document (or all documents) for your organization regardless of who created them.

Searching for Documents by Document Number

Select "Find by Document Number" from the "Search by:" drop down list. Enter all or part of the number for the document you wish to find in the Document Number box. Click *Search*.

Searching for Documents by Control Number

Not all OPTIS document numbers follow the same conventions. For instance, grant agreements are known by a five digit number such as 33999, but periodic reports use a number beginning with letters such as APR-19-0879 where APR stands for Agency Periodic Report and 19 stands for the fiscal year.

For ease of locating documents for troubleshooting purposes, a unique seven-digit control number generated by OPTIS is assigned to every document. The control number is standardized seven digits no matter the type of document. It can be found in the lower left corner of any document. You can use this number along with a screen print to identify problem areas to the OPTIS system administrator.

Control # 10089691

To search for a document by control number you must know the exact seven-digit number; OPTIS does not allow a partial number search.

Additional Search Options to narrow Searching by Person, Organization, and Organization Hierarchy

Date Range

These additional search features can be tacked on to other search criteria to narrow the focus of your results. In the "Date Range:" boxes, key in the desired dates using the following format MM/DD/YYYY.

Alternatively you can click on the calendar icon 🗓 next to the "from" and "to" boxes for a pop up calendar to appear. Select the desired dates and OPTIS will auto-fill them for you. However, it should be noted the functionality of this feature is highly dependent on what web browser you are accessing OPTIS through.

Document Type

Similar to specifying a date range, searching for documents by document type is another way of adding criteria to narrow your search. Use the Document Type drop-down menu to limit your search to only one type of document. View your documents of only one type.