



Idaho Transportation Department

OTIS User Manual

Office of Transportation Investment System

V1.0

A large, 3D geometric graphic composed of several overlapping, semi-transparent blue and grey rectangular blocks. The blocks are arranged in a way that creates a sense of depth and perspective. The year "2014" is printed in a large, black, sans-serif font on the rightmost, most prominent block.

2014



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GETTING STARTED

HINTS AND TIPS FOR WORKING WITH A WEB APPLICATION

OTIS - unlike its predecessor, the Project Tracking System (PJT) - has been developed as a web application. This allows **you** – the end user - to access and use OTIS using your web browser software e.g. Microsoft Internet Explorer.

Because we are using web application technologies, users located outside of ITD's internal corporate network see real time data regarding transportation projects contained within the current Idaho Transportation Investment Program in addition to history of currently active and closed projects.

Here are some things to keep in mind as you work with OTIS in the web application environment:

DO! – opening multiple instances of OTIS within multiple web browser sessions allows you to multitask different OTIS functions.

DON'T – use the forward and back browser buttons to navigate.

DO! - use the controls provided within the application

DO! – use the CNTRL-F hot-key combination to bring up a Find i.e. Search function where you can search for any text value on the current page.

DON'T – be impatient – response time for OTIS, especially for users outside of ITD's internal network – depends on other traffic and applications on your internet connections.

DO! – use the export feature on OTIS reports to extract your report results to a PDF, Excel or other file format.

OTIS Security

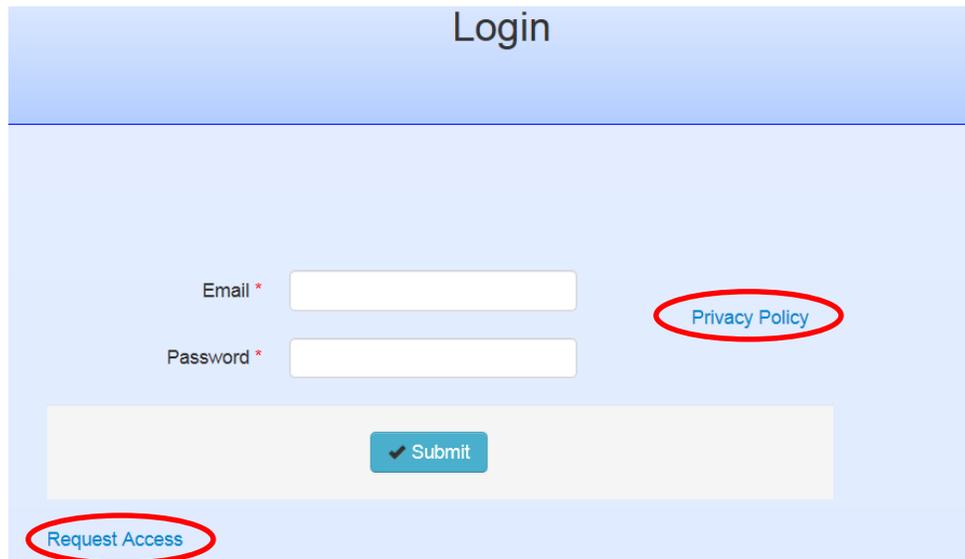
To permit access, applications such as OTIS typically utilize a security scheme, which consists of 1) a user name and 2) a password.

Note: For the purpose of this training, external OTIS users have been identified in advance to the ITD network administrators and have been given credentials on the ITD network which you will use to logon to the training room workstations.

Users inside ITD's network such as ITD staff and internal contractors already have user names and passwords assigned to them as part of allowing access to ITD network resources such as email.

First time internal users should contact OTIS administrators at ITD-OTIS@ITD.IDAHO.GOV for setting up access to OTIS functions using their regular ITD credentials.

First time external users should visit the OTIS Internet portal at <https://OTISWEB.ITD.IDAHO.GOV/> and click on the prompt “*Request Access*”.

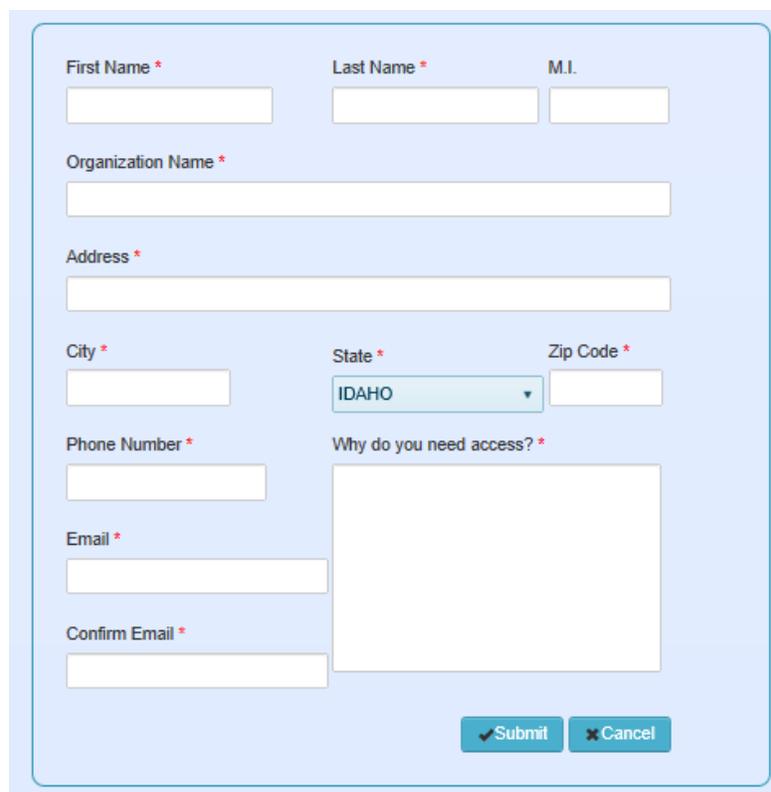


The image shows a login screen with a light blue background. At the top center, the word "Login" is displayed in a dark blue font. Below this, there are two input fields: "Email *" and "Password *". To the right of these fields is a link labeled "Privacy Policy" which is circled in red. Below the input fields is a large, light gray rectangular area containing a blue button with a checkmark and the text "Submit". At the bottom left of the screen, there is a link labeled "Request Access" which is also circled in red.

Figure 1 - Logon Screen at the OTIS Internet portal

TIP: be sure to click on “*Privacy Policy*” to read and understand OTIS data privacy limitations.

After clicking on “*Request Access*”, the following screen displays requesting your information:



The image shows a registration form with a light blue border. The form contains several input fields and a dropdown menu. The fields are: "First Name *", "Last Name *", "M.I.", "Organization Name *", "Address *", "City *", "State *", "Zip Code *", "Phone Number *", "Email *", and "Confirm Email *". The "State *" dropdown menu is currently set to "IDAHO". To the right of the "City *", "State *", and "Zip Code *" fields is a large text area labeled "Why do you need access? *". At the bottom right of the form, there are two buttons: a blue button with a checkmark and the text "Submit", and a blue button with an 'X' and the text "Cancel".

Figure 2 - New External User Information Screen

Provide all requested information and when complete, click on “*Submit*”.

Upon completion of OTIS account setup, new users are sent a standardized “Welcome to OTIS” email.

From: OTIS@itd.idaho.gov [mailto:OTIS@itd.idaho.gov]
Sent: Friday, July 18, 2014 4:03 PM
To: Joe Smith
Subject: Welcome to OTIS
Importance: High

Your request to access the OTIS application has been granted. Enclosed are your username and password.

Username: Joe.Smith@itd.idaho.gov

Password: **X689u6B6Z** *You may reset at your earliest convenience by clicking the 'My OTIS' link in the top right corner of the application and filling out the change password information.*

To access OTIS please use this link: <http://otisweb/otis.web>

Thank You

Figure 3 - Sample "Welcome to OTIS" email

The setup email includes an initial password that is only to be used to access OTIS from outside the internal ITD network and which can be changed by the user from the MyOTIS feature within OTIS. For internal ITD users, this DOES NOT replace your current ITD network/Windows password.

Remember: *For ITD internal users, changing your OTIS password from within MyOTIS does not change your internal ITD password; and changing your ITD password from within Windows will not affect your OTIS password. Have we confused you yet??*

OTIS BASICS

TRAINING GOALS

At the end of this training, OTIS users will be able to:

- Visit the OTIS external web logon page and request access;
- Access OTIS (and manually logon if necessary);
- Understand the different Alerts, ToDo List, and Reports homepage areas;
- Search for specific projects by Key Number using the GoTo feature;
- Search for a range of projects using Advanced Search;
- Use basic display grid features such as sorting and grouping;
- Identify location, budget, obligation, milestone and other information for a project; and
- Run and understand basic OTIS reports.

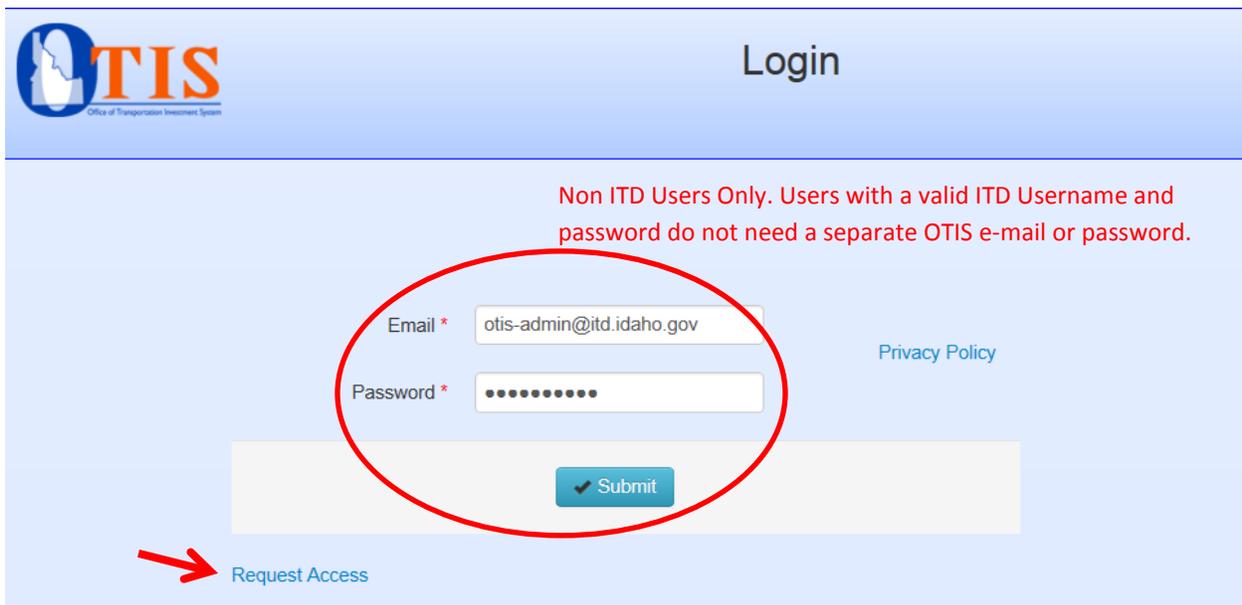
LOGIN TO OTIS

If inside ITD's Network . . .

- Use this option for this training class
- Navigate to URL [//otisweb/otis.web](http://otisweb/otis.web)
You will be passed through OTIS security and taken to your OTIS home page.

If outside ITD's network (anywhere on the Internet) . . .

- Navigate to URL <https://otisweb.itd.idaho.gov/>
- Logon with a valid user ID / Password combination.
 - If assigned or using a username@itd.idaho.gov username and password, use these credentials;
 - If previously assigned an external username@mail_domain username and password, use these;
 - If you have neither an ITD.IDAHO.GOV user account or external user account, click on "[Request Access](#)" as shown below.



OTIS
Office of Transportation Investment System

Login

Non ITD Users Only. Users with a valid ITD Username and password do not need a separate OTIS e-mail or password.

Email *

Password *

[Privacy Policy](#)

[Request Access](#)

Figure 4 - OTIS Internet Logon Portal

HOMEPAGE

Your OTIS homepage provides a personalized dashboard that shows a number of features customized for you.

Let's do a short tour:

- **Go To Key Number:** Allows you to quickly jump to a Key Number representing a project of interest: enter a valid key number in the "Go To Key Number" field and click "Go" or press Enter – this will take you quickly to the View / Edit project screen.
- **To Do:** Users with Edit permissions and who are responsible for tasks in OTIS have a 'To Do' section on their homepage with links to outstanding work items such as Project Change Requests and Obligations.
- **Alerts:** Updates on pending tasks, notices, overdue items, etc. User can review any Alerts in mailbox user able to view alert, mark read, mark unread, etc.
- **MyOTIS:** Click on "My OTIS" to select personalized reports, change you password*, etc.

- **Reports:** Users have access to ALL OTIS reports, but users may want to set up their MyOTIS to show their most frequently accessed reports on their OTIS Homepage.

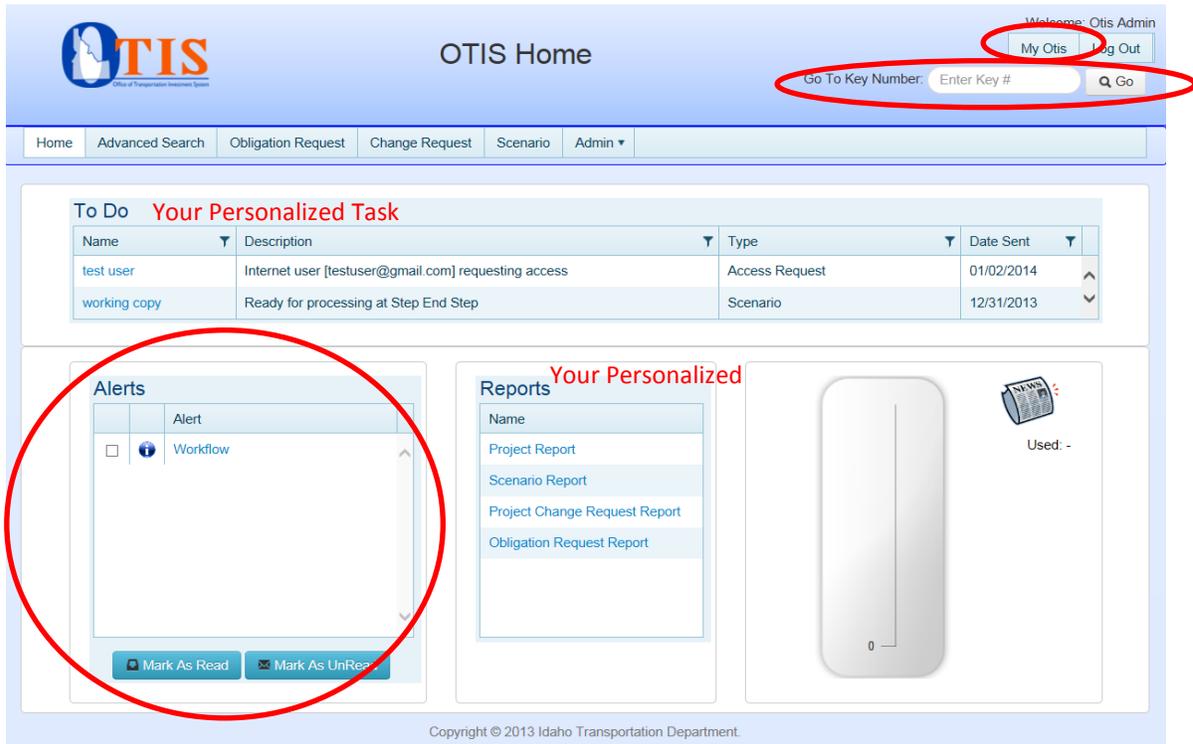


Figure 5 - OTIS Homepage Screen

Practice Exercise: Try entering some key numbers of interest into the **Go To Key Number** field and click on **Go**. This will return a results screen showing scope, location, schedule and budget details for your project. Don't worry, we'll spend some more time to go through the different information tabs shown on the project details screen.

TIP: *If you don't have any key numbers in mind, your instructor has hard copies of the ITIP 'Pink Book' containing the approved program from September 2013.*

OTIS MENUS

Users navigate from their Homepage and between different OTIS pages by navigating across four or more tabs which may include: **Home**, **Advanced Search**, **Obligation Request** and **Change Request**.

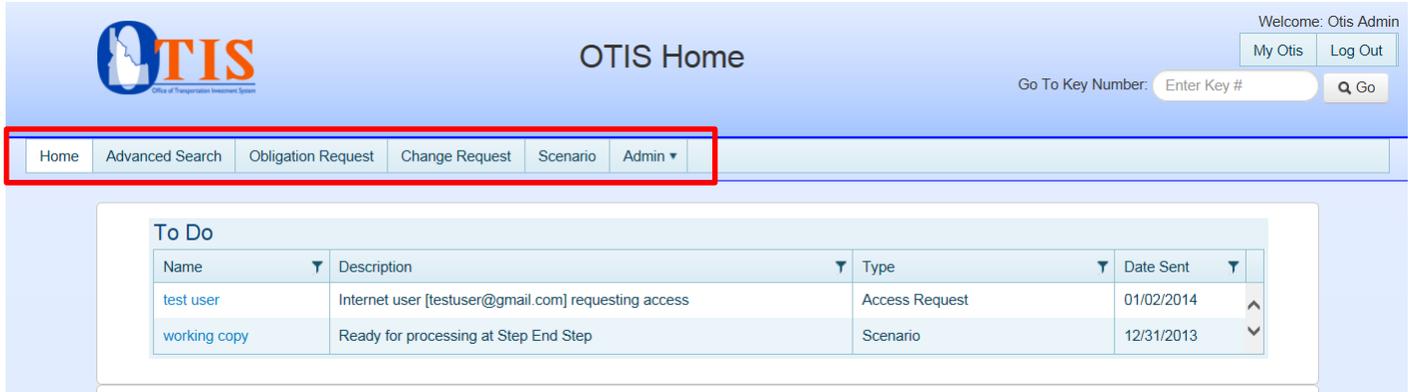


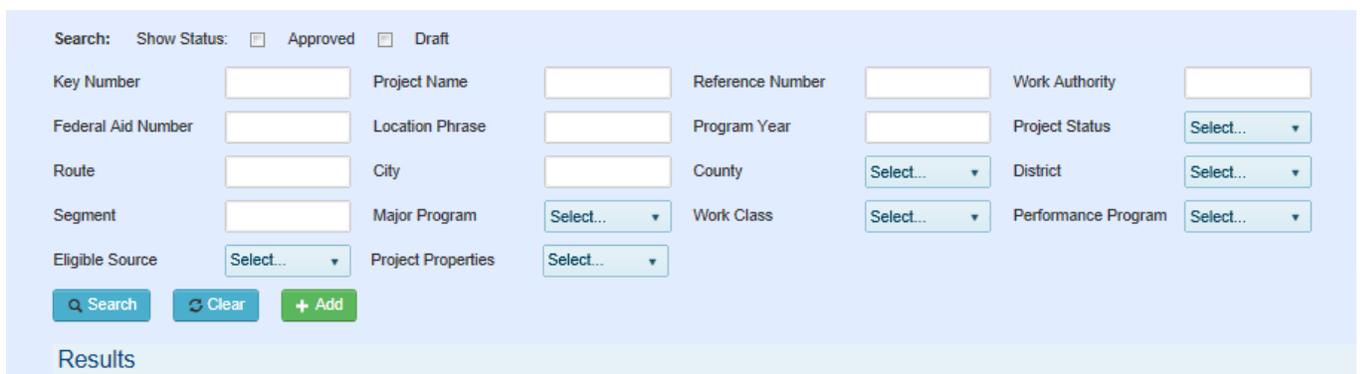
Figure 6 - OTIS Homepage showing Navigation Tabs

- **Home:** Takes user to the Home Page
- **Advanced Search:** Takes user to the Advanced Search Page to search for projects or to create a new project.
- **Obligation Request** menu tab: List of expected obligation requests. Click the hyperlink to view a specific obligation request.
- **Change Request:** List of expected open change requests. Click the hyperlink to view a specific change request.

The other tabs shown are for internal and/or reserved OTI functions.

ADVANCED SEARCH

Whereas the **Go To Key Number** search field on your Homepage allows you to quickly retrieve information for one project, the Advanced Search allows more complex querying of the OTIS project database. Values for up to 18 search fields can be entered; for example, you can search for all District 3 projects for the 2014 program year by selecting "District 3" under **District** and entering "2014" for **Program Year**; on the other hand, if you want to see just one Key Number you can enter that value under **Key Number**. You can select between the Draft and the Approved programs by setting checkboxes accordingly.



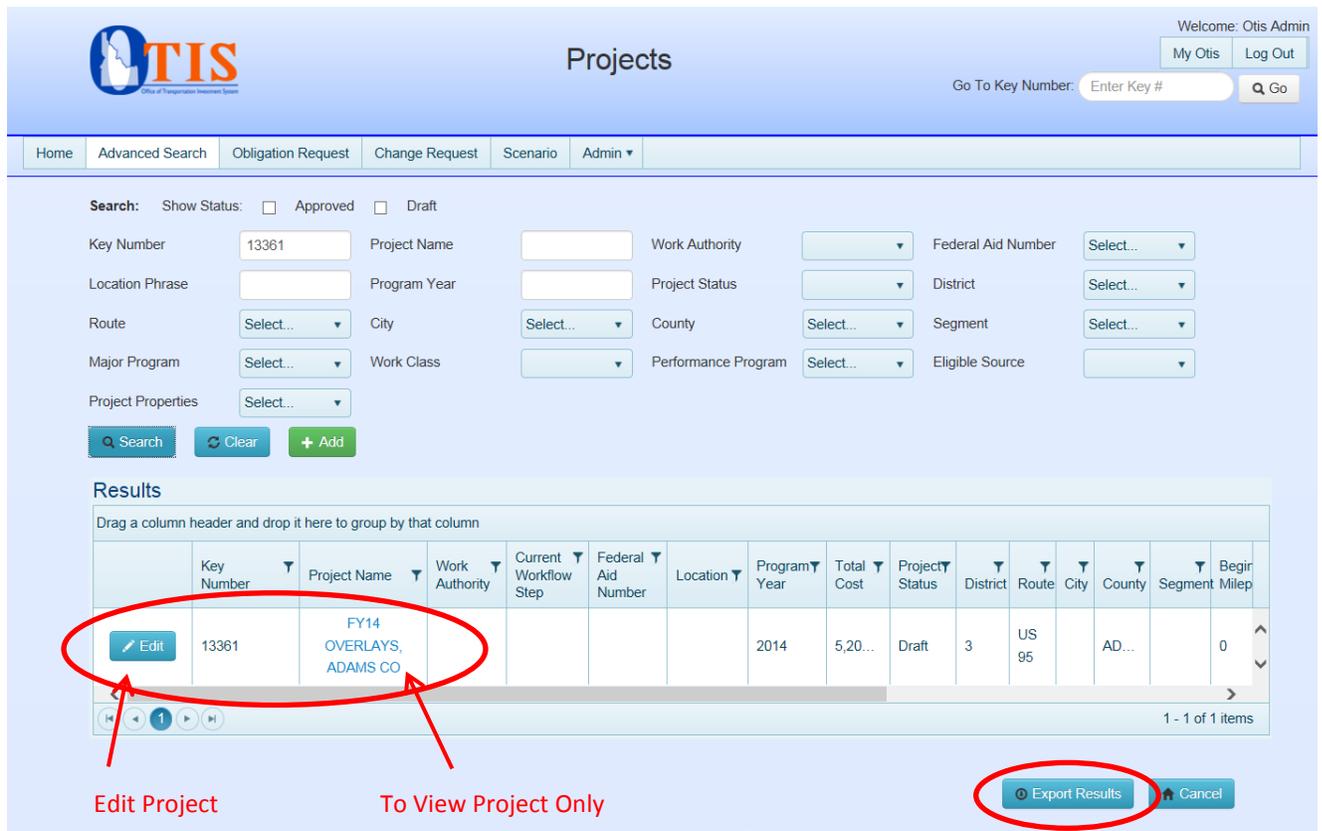
The screenshot shows the Advanced Search screen. It includes a 'Search:' section with 'Show Status' options for 'Approved' and 'Draft'. Below this are several search fields: Key Number, Project Name, Reference Number, Work Authority, Federal Aid Number, Location Phrase, Program Year, Project Status, Route, City, County, District, Segment, Major Program, Work Class, Performance Program, Eligible Source, and Project Properties. At the bottom, there are 'Search', 'Clear', and '+ Add' buttons. Below the search area is a 'Results' section.

Figure 7 - Advanced Search Screen

Following are the OTIS Advanced Search fields:

- **Key Number**
- **Project Name**
- **Reference Number** (same as a temporary Key Number, starts with 'ORN' for OTIS Reference Number)
- **Federal Aid Number**
- **Work Authority**
- **Route**
- **Segment**
- **District**
- **City**
- **County**
- **Location Phrase** (could be a geographical identifier in the Location field)
- **Eligible Source**
- **Program Year**
- **Major Program**
- **Performance Program**
- **Project Status**
- **Project Properties**
- **Work Class**

Once you enter your criteria and click on Search, your results are returned.



The screenshot shows the OTIS web application interface. At the top right, it says "Welcome: Otis Admin" with "My Otis" and "Log Out" buttons. Below that is a search bar "Go To Key Number: Enter Key #". A navigation menu includes "Home", "Advanced Search", "Obligation Request", "Change Request", "Scenario", and "Admin". The main search area has various filters for "Key Number", "Project Name", "Work Authority", "Federal Aid Number", "Location Phrase", "Program Year", "Project Status", "District", "Route", "City", "County", "Segment", "Major Program", "Work Class", "Performance Program", "Eligible Source", and "Project Properties". There are "Search", "Clear", and "Add" buttons. Below the search area is a "Results" section with a table. The table has columns for "Key Number", "Project Name", "Work Authority", "Current Workflow Step", "Federal Aid Number", "Location", "Program Year", "Total Cost", "Project Status", "District", "Route", "City", "County", "Segment", and "Begin Milep". One row is visible with "Key Number: 13361", "Project Name: FY14 OVERLAYS, ADAMS CO", "Program Year: 2014", "Total Cost: 5,20...", "Project Status: Draft", "District: 3", "Route: US 95", "County: AD...", and "Begin Milep: 0". An "Edit" button is circled in red next to the first row. At the bottom right, there are "Export Results" and "Cancel" buttons, also circled in red. Red arrows point from the text "Edit Project" and "To View Project Only" to the "Edit" button. The footer says "Copyright © 2013 Idaho Transportation Department".

Key Number	Project Name	Work Authority	Current Workflow Step	Federal Aid Number	Location	Program Year	Total Cost	Project Status	District	Route	City	County	Segment	Begin Milep
13361	FY14 OVERLAYS, ADAMS CO					2014	5,20...	Draft	3	US 95		AD...		0

Figure 8 - the Advanced Search Results Screen

Up to 250 projects can be returned and displayed returned in the results section. If necessary, insert additional criteria and click on **Search** to refine the search and return fewer results. The following actions can be performed on the returned list of projects:

- Search results can be exported by selecting "**Export to CSV**".
- For a specific project, click on the project hyperlink to open the project for viewing.
- If you have proper security to make changes to OTIS projects, clicking on Edit will open an **Edit Project** screen.
- The Advanced Search results in OTIS are displayed using a common layout method called a "Grid".

GRID FUNCTIONALITY

- All Grids in OTIS have advanced sort, filter, and search capability.
- Click the **Column** name to Sort by the Column characteristic
- Click the **Funnel**  to see advanced filter and search capabilities.
- Dragging and dropping one or more Column names into the grouping row tells OTIS to rearrange the data and display it using the grouped column names as sort breaks.

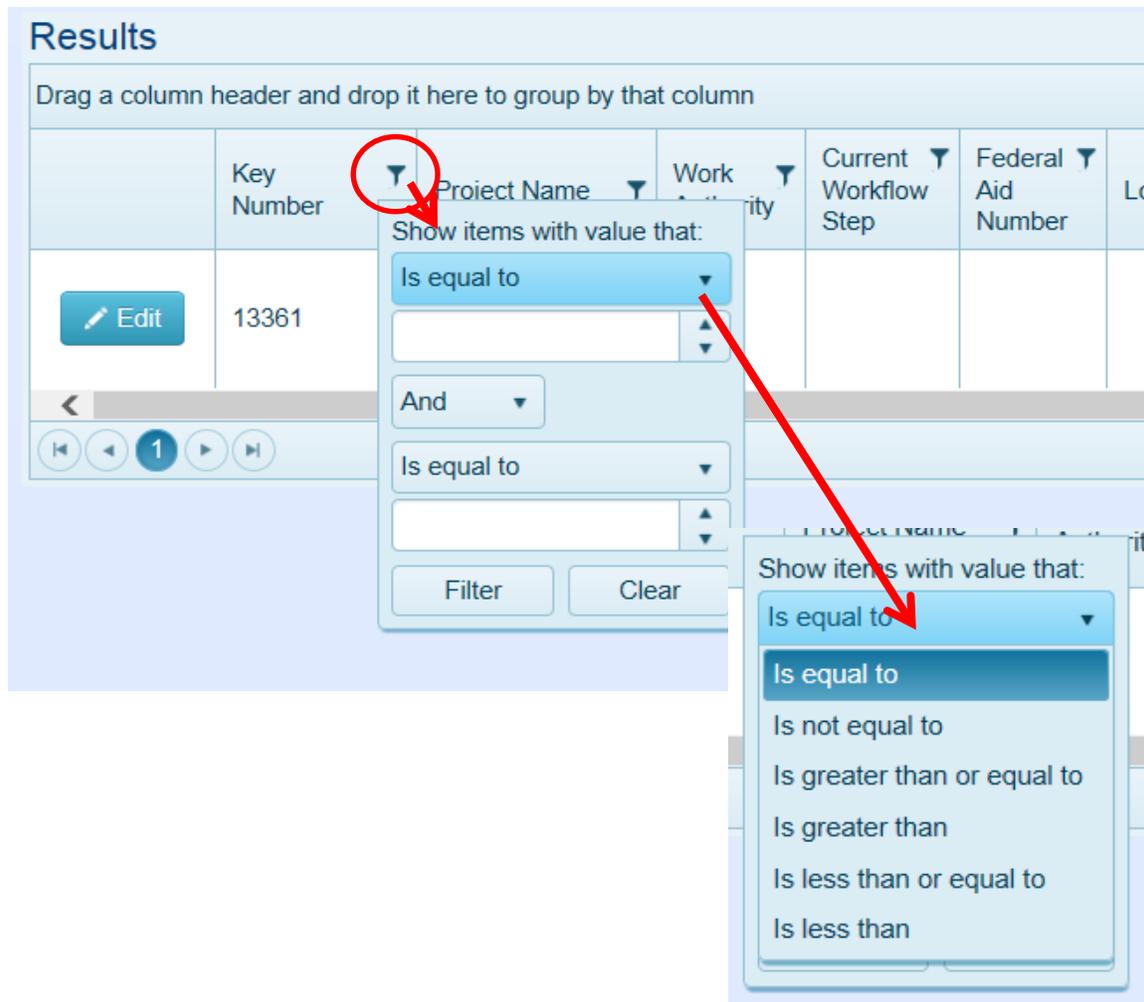


Figure 9 - Using Funnel Filters

PROJECT INFORMATION IN OTIS

OTIS maintains project information broken out under a series of tabs and subtabs.

There are six main tabs: **General, Budget, Work Authority, Obligation, History** and **Documents**

Two of the six main tabs – **General** and **Budget** – are further broken out into more detailed sub-tabs.

For the **General** tab, the sub-tabs are **Project, Location, Scope** and **Milestone & Tags**.

For **Budget**, the sub-tabs are **Summary, Program Details** and **History**.

Here are the eleven tabs containing project information:

- **General / Project** – a wrap-up or summary of the entire project record.
- **General / Location** – allows defining of multiple locations, will map project locations.
- **General / Scope** – tracks project workclass and subclass and related info.
- **General / Milestone & Tags** – summarizes OTIS, Environmental, and PSS milestones plus Project Properties.
- **Budget / Summary** – high level wrap up of the project schedule, obligations and expenditures.
- **Budget / Program Details** – details of schedule and obligation by phase and year along with match sharing.
- **Budget / History** – documents changes to the budget for the project.
- **Work Authority** – details the work authorities set up for the project.
- **Obligation** - shows obligation history and details for the project, and allows you to initiate new obligation issues.
- **History** – shows the history of the project and changes through processes such as program update.
- **Documents** – provides a means of associating related project documentation in electronic form.

GENERAL PROJECT INFORMATION

Key Number 13361 will be used as a sample project to help show the project information screens. The General Project screen for KN 13361 provides a quick look at how the project is defined, when it is scheduled in the Program and provides an overview of the Budgeted, Obligated and Expended amounts of funding.

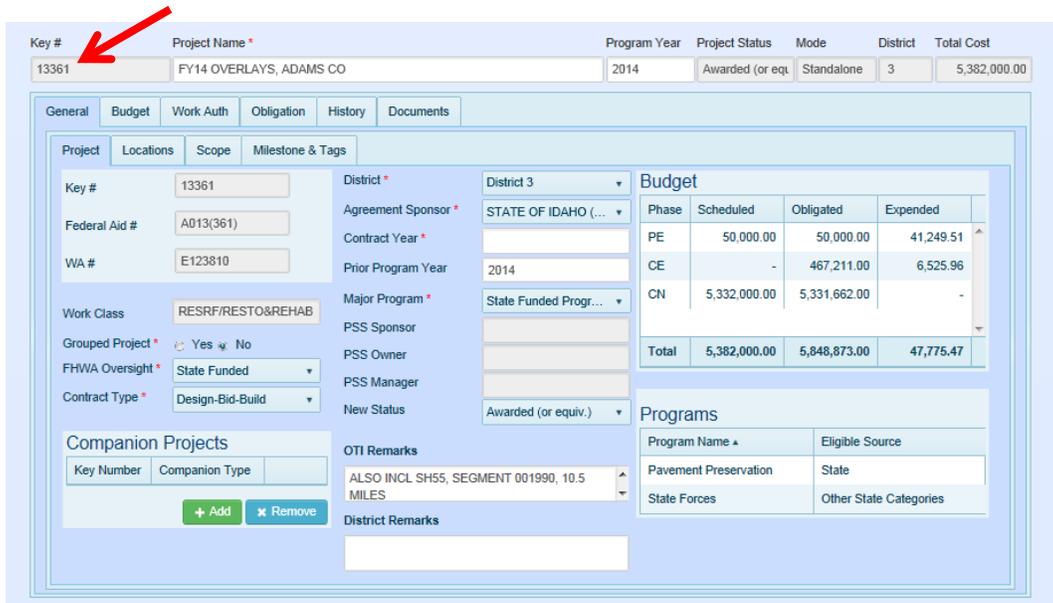


Figure 40 - General/Project Screen Showing Project Description, Status, Budget and Programs

Practice Exercise: Conduct your own Advanced Search for Key Number 13361 and see if you can find the following information from the **General/Project** tab:

- 1) What is the assigned Work Authority?
- 2) What Program Name is this project classified under?
- 3) What is the total amount of Expended PE?
- 4) What is the total Budgeted or Scheduled Cost?

PROJECT LOCATIONS

Click on the **Locations** tab. The section of the screen titled **“Overall Project Location Characteristics”** provides calculated factors for project length, number of lanes, and geographical distributions of the project across city, urban and county boundaries.

The box to the right titled **“Project Location Details”** will contain segment and milepost information for each road segment included within the project.

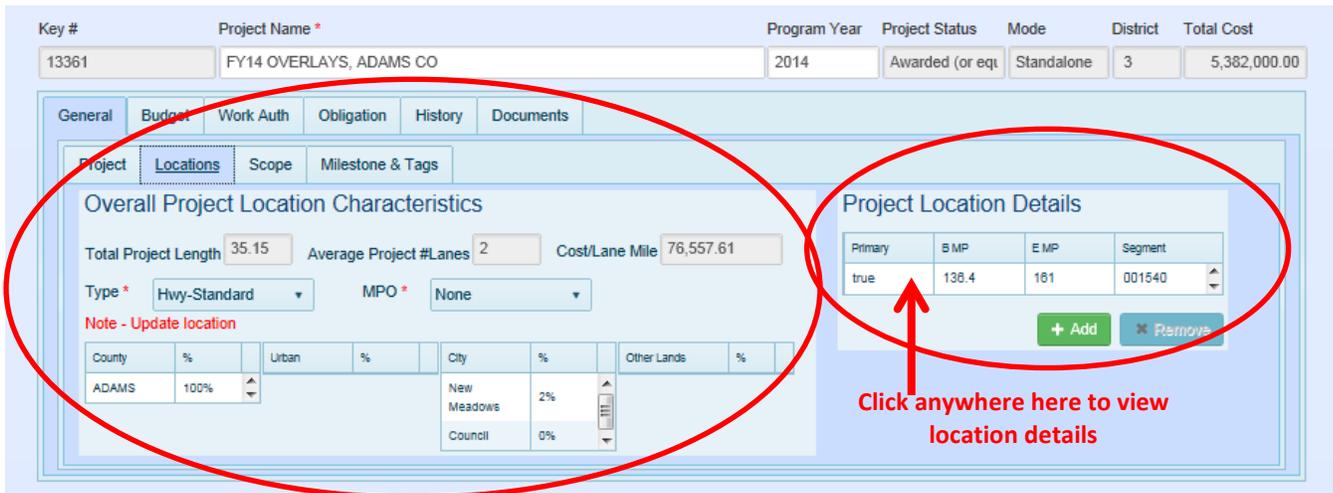


Figure 5 - Project Location Summary Screen

Practice Exercise: See if you can calculate the Cost/Lane Mile from the other information contained on the summary screen: Total Cost, Total Project Length, and Average Project #Lanes.

When you are done, click anywhere inside the Project Location record to expand the details. You will see this screen to the right.

If you had multiple locations for the project, you could click on each location row to see the detail e.g. segment, beginning and ending MP, etc.

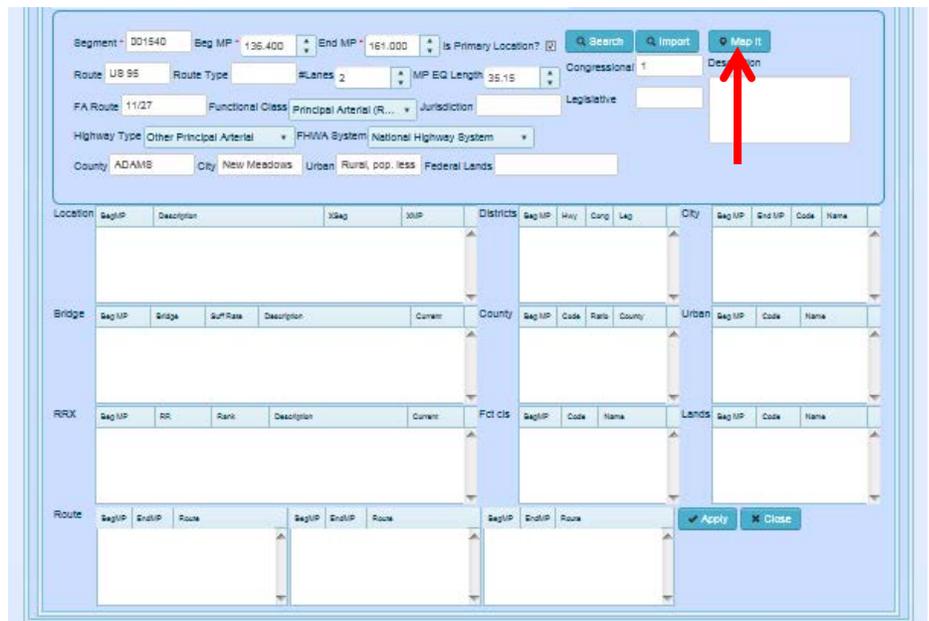


Figure 6 - Location Record Details

Also included is location data for bridges, railway crossings, and other geographic and jurisdictional information.

OTIS utilizes the Department Linear Reference System to map project locations where supported by the data. For the location record shown for the example of Key Number 13361, click the **Map It** button. A separate web app window will open and the Linear Reference System map will show that location. If the project has multiple locations, you will need to select each location, open the Location details screen, and then click **Map It** for that location. The project location is highlighted in yellow.

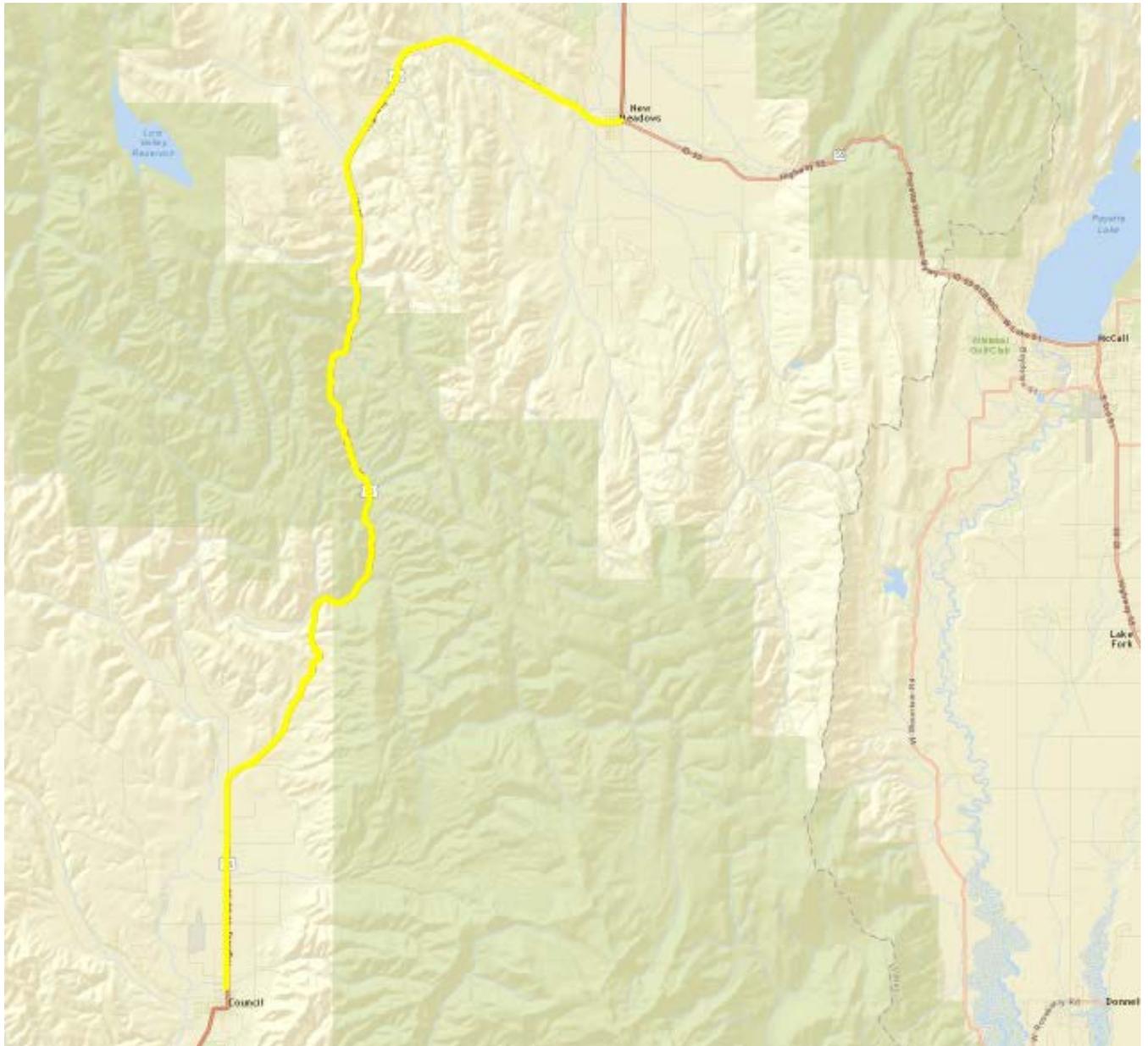


Figure 73 - GIS / LRS Representation of Project Location for KN 13361

TIP: You close the web browser window containing the map to exit from it.

PROJECT SCOPE

Clicking on the **Scope** sub-tab, opens a screen that primarily displays the Work Class and Sub classes for our project.

In OTIS, some key information appears on multiple screens. Work Authority and Federal Aid number also appear on the **General/Project** screen.

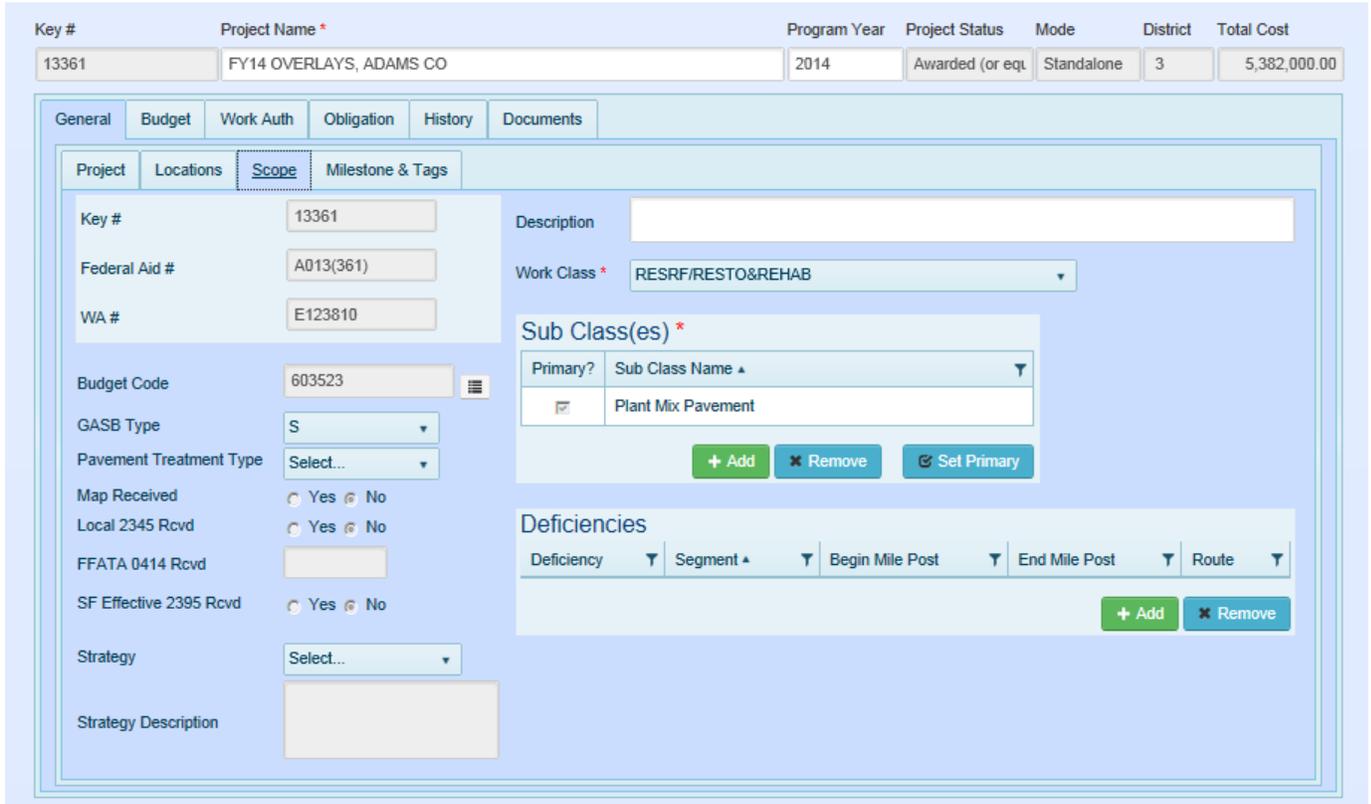


Figure 14 - General Scope Screen

Practice Exercise: Using the Advanced Search results for Key Number 13361, what is the Budget Code for this project?

PROJECT MILESTONES AND TAGS

Clicking on the Milestone & Tags tab, you bring up a screen that shows the OTIS Milestones, Environmental Dates, and PSS Milestones. PSS and Environmental data is brought into OTIS from the source databases.

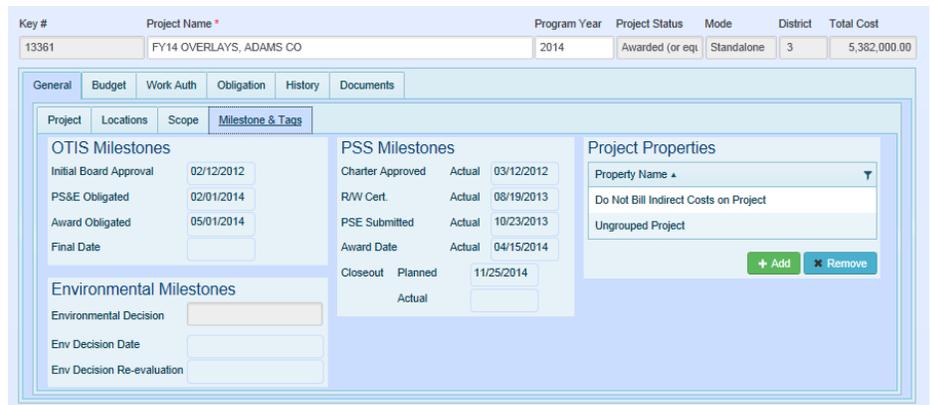


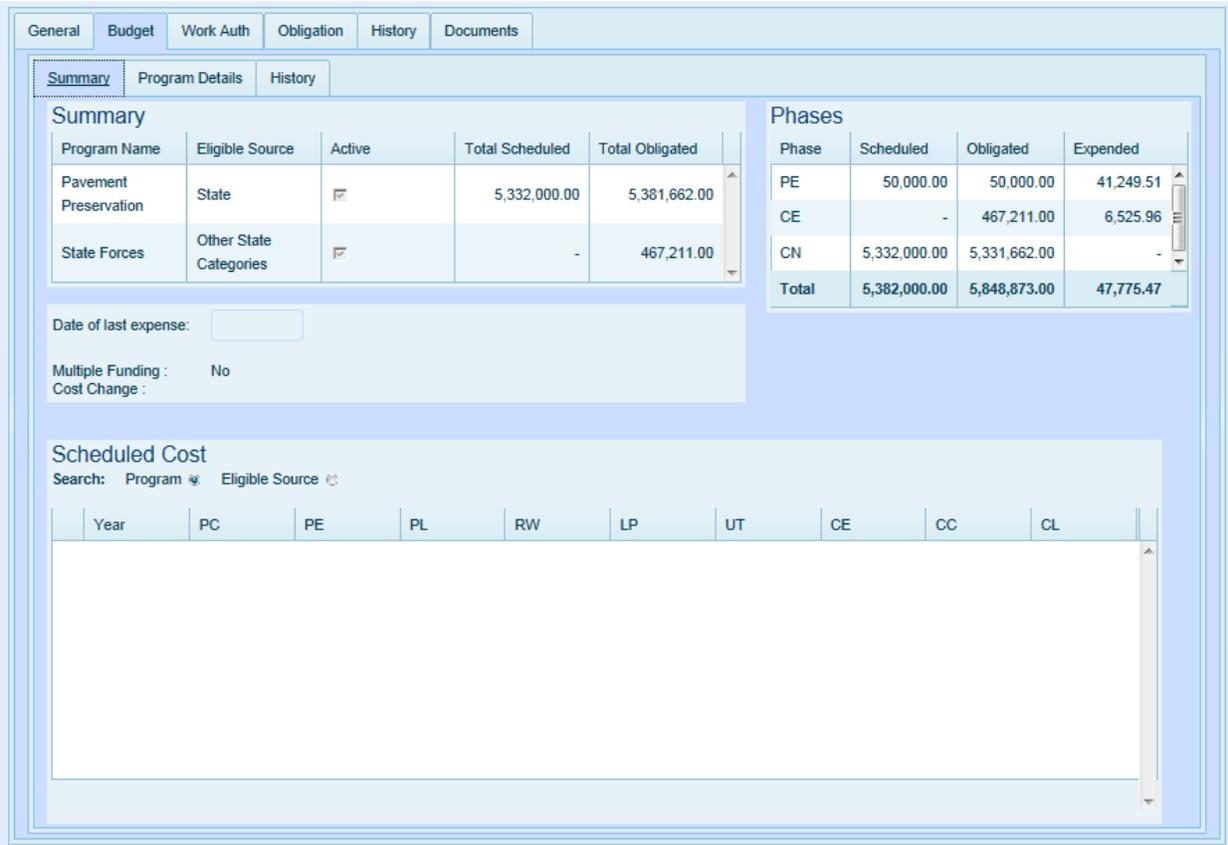
Figure 8 - OTIS, Environmental, and PSS Milestones

Practice Exercise: Using the Advanced Search results for Key Number 13361, answer the following questions:

- 1) In what month was this project originally approved by the IT Board?
- 2) What is the submittal date for the PS&E package?
- 3) Was this project awarded?
- 4) If so, what was the date that the project was obligated for award?
- 5) Is this project Grouped or Not Grouped?

BUDGET SUMMARY

The next area to look at regards project budgets. Click on the **Budget** tab – this brings up the **Budget/Summary** screen. This screen repeats some of the summary information shown on the **General/Project** screen such as totals for **Scheduled, Obligated** and **Expended** by phases.



The screenshot shows the 'Budget Summary' screen with the following data:

Program Name	Eligible Source	Active	Total Scheduled	Total Obligated
Pavement Preservation	State	<input checked="" type="checkbox"/>	5,332,000.00	5,381,662.00
State Forces	Other State Categories	<input checked="" type="checkbox"/>	-	467,211.00

Phase	Scheduled	Obligated	Expended
PE	50,000.00	50,000.00	41,249.51
CE	-	467,211.00	6,525.96
CN	5,332,000.00	5,331,662.00	-
Total	5,382,000.00	5,848,873.00	47,775.47

Additional fields on the screen include: Date of last expense: ; Multiple Funding: No; Cost Change: ; and a 'Scheduled Cost' table with columns for Year, PC, PE, PL, RW, LP, UT, CE, CC, and CL.

Figure 9 - Budget Summary Screen

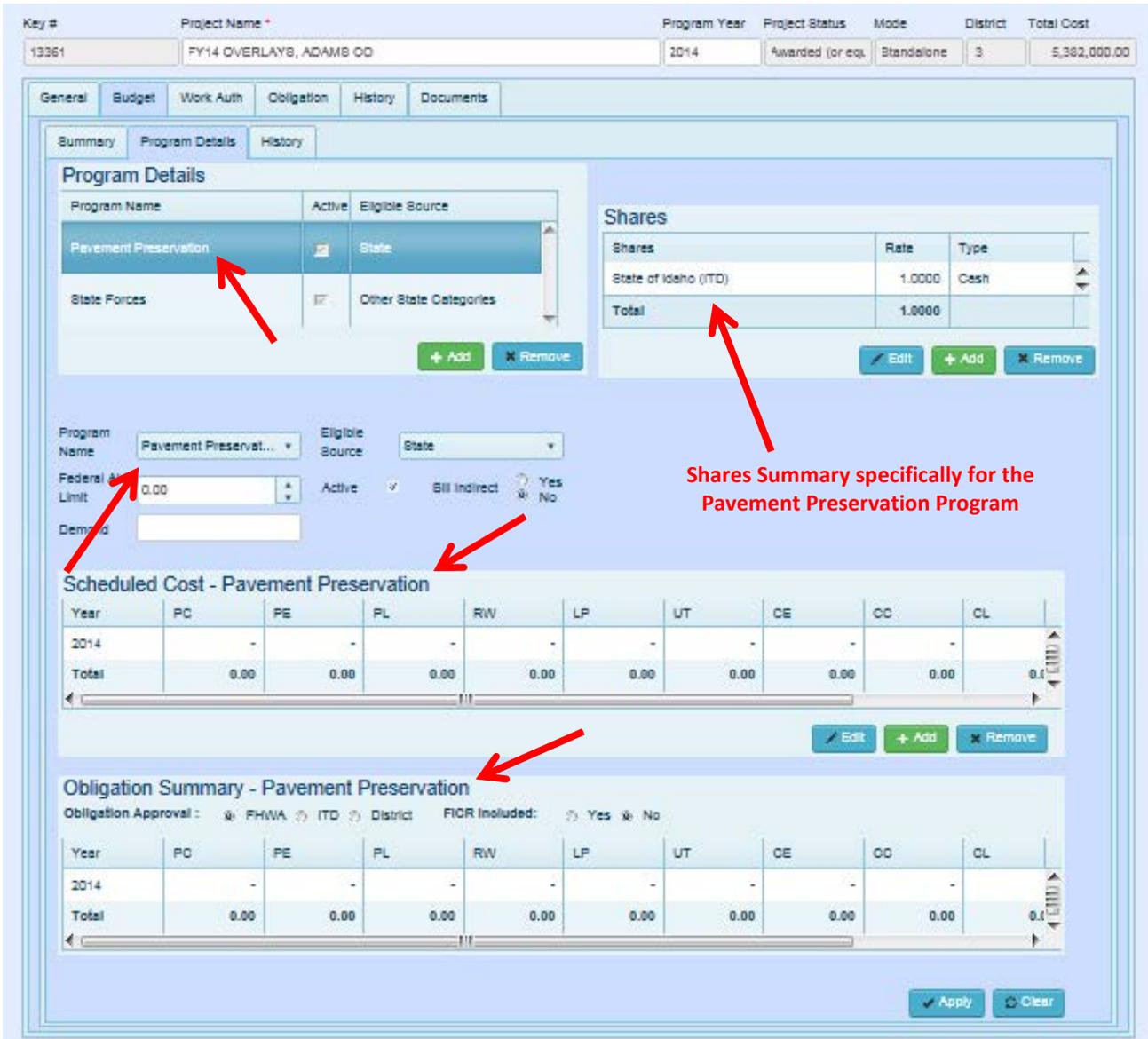
Practice Exercise: Using the Advanced Search results for Key Number 13361, answer the following questions:

- 1) What is the total amount obligated for PE?
- 2) What is the total expenditures for this project?

BUDGET DETAILS

Clicking on the **Budget/Program Details** tab brings up a screen displaying the following information for the project: Program Details and Match Shares, along with **Scheduled Costs** and an **Obligation Summary** for each selected program. There are two programs listed for Key Number 13361 – Pavement Preservation and State Forces.

By selecting either **Pavement Preservation** or **State Forces** from the Program Name dropdown, the corresponding **Scheduled Costs** and the **Obligation Summary** section will display.



Key # 13361 Project Name FY14 OVERLAYS, ADAMS OD Program Year 2014 Project Status Awarded (or eq) Mode Standalone District 3 Total Cost 5,382,000.00

General Budget Work Auth Obligation History Documents

Summary Program Details History

Program Details

Program Name	Active	Eligible Source
Pavement Preservation	<input checked="" type="checkbox"/>	State
State Forces	<input type="checkbox"/>	Other State Categories

+ Add - Remove

Shares

Shares	Rate	Type
State of Idaho (ITD)	1.0000	Cash
Total	1.0000	

Edit + Add - Remove

Program Name Pavement Preservat... Eligible Source State

Federal Limit 0.00 Active Bill Indirect Yes No

Demand

Scheduled Cost - Pavement Preservation

Year	PC	PE	PL	RW	LP	UT	CE	OC	CL
2014	-	-	-	-	-	-	-	-	-
Total	0.00								

Edit + Add - Remove

Obligation Summary - Pavement Preservation

Obligation Approval: FHWA ITD District FICR Included: Yes No

Year	PC	PE	PL	RW	LP	UT	CE	OC	CL
2014	-	-	-	-	-	-	-	-	-
Total	0.00								

Apply Clear

Figure 10 - Budget/Program Details Screen Spotlighting the Pavement Preservation Portion of the Project

Practice Exercise: Using the Advanced Search results for Key Number 13361, answer the following questions:

- 1) For 2014, identify the Schedule or Budget amounts by phase for the Pavement Preservation program portion of the project.
- 2) Identify the obligation amounts by phase for the Pavement Preservation program portion of the project.

BUDGET HISTORY

Click on the **Budget/History** tab to see if there have been any Historical changes recorded to the project.

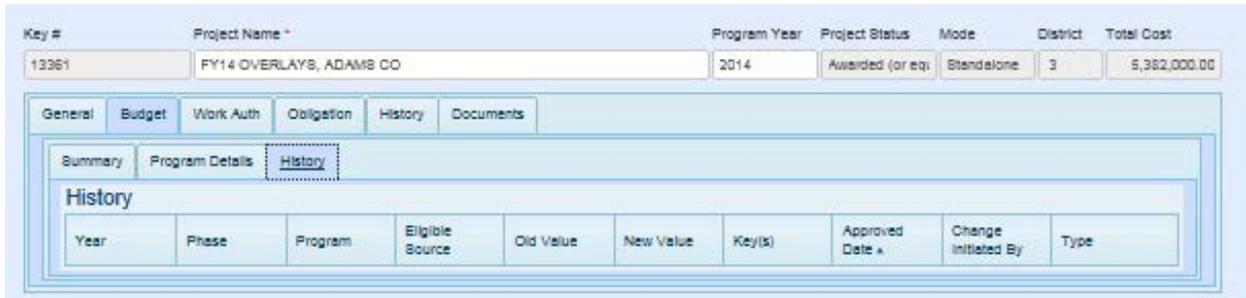


Figure 18 - Budget/History Screen

WORK AUTHORITY

Clicking on the **Work Authority** tab for Key Number 13361 displays the following screen showing the **Work Authority** assigned to this project along with the dates the **Work Authority** was established and is scheduled to expire.

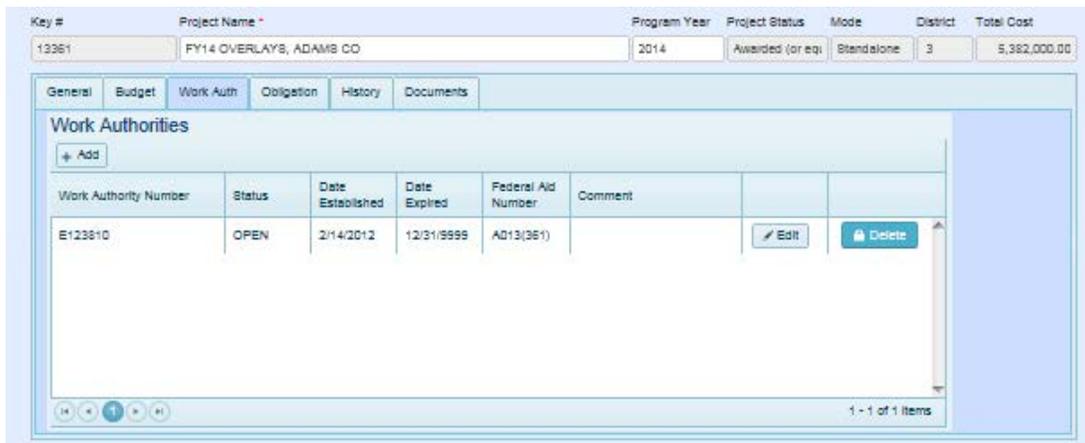


Figure 19 - Work Authority Screen

PROJECT HISTORY

Clicking on the History tab shows changes to the project, for example through the annual Program Update process.

For Key Number 13361, the following screen shows a historical change record dated 7/8/2014 and corresponding to the FY15-FY19 Program Update.

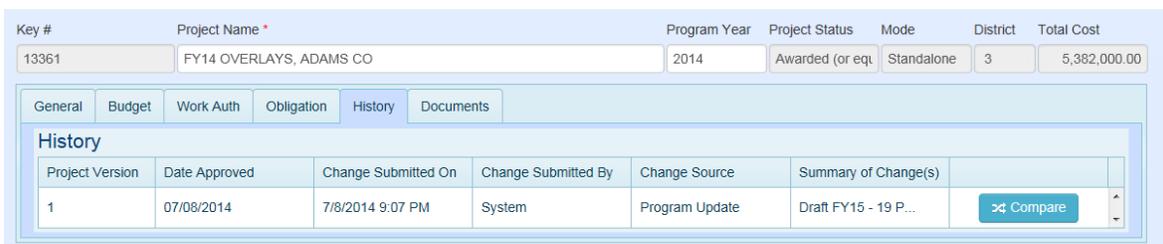


Figure 19 - Project Change History

Clicking on the **Compare** button brings up the following summary of changes that occurred to Key Number 13361 as part of the Program Update process.

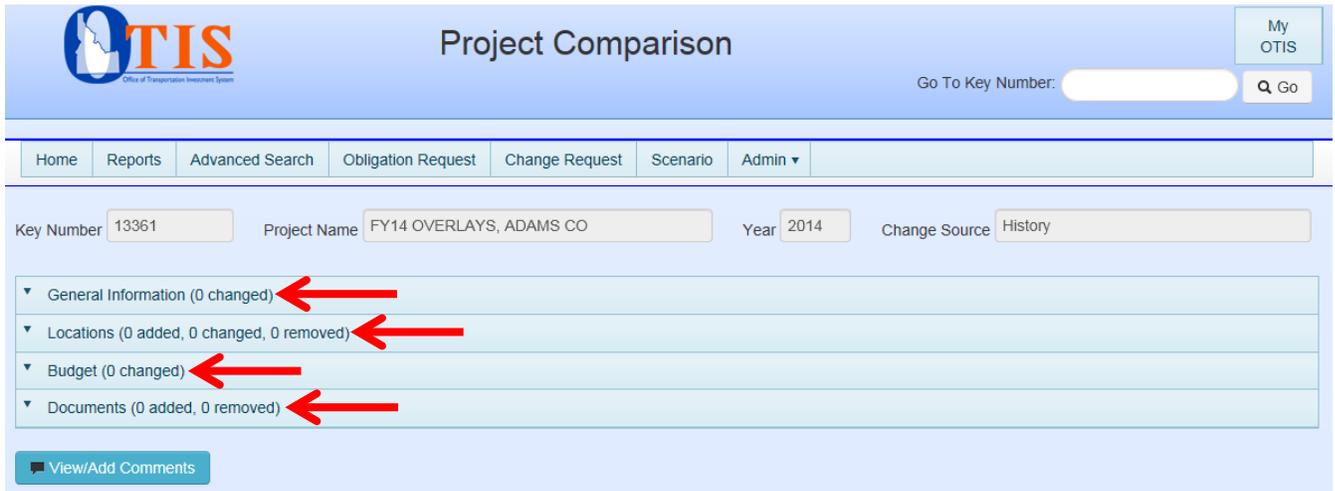


Figure 20 - History - Project Comparison Screen

For Key Number 13361, the above shows that there were no changes to the project’s **Location**, **Budget**, or other project data as an outcome of the **Program Update** process.

PROJECT DOCUMENTS

Clicking on the **Documents** tab brings up the following screen showing documents electronically linked to this Key Number.

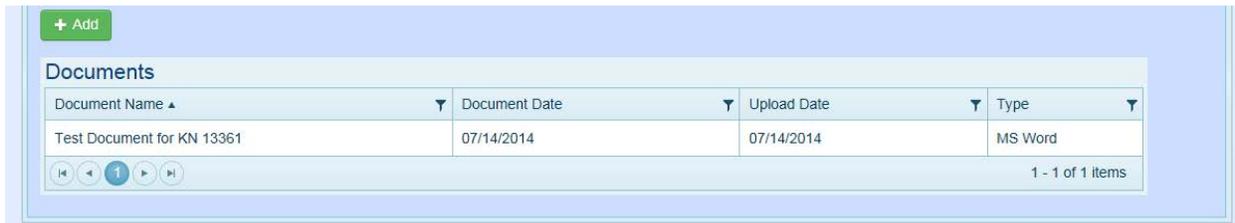


Figure 21 - Project Documents Screen

Clicking on the **Document Name** brings up the following screen:

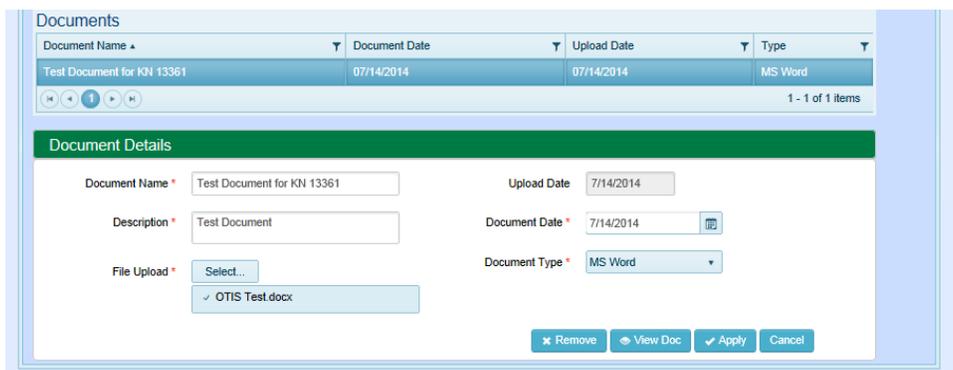


Figure 22 - Document Details Screen

Clicking on **View Document** brings up the document using the correct viewer, in this case using Microsoft Word.

OTIS REPORTS

OTIS includes a number of ‘canned’ or pre-developed reports. Navigate to the **Reports** section by clicking on the **Reports** main menu tab.

The list of reports display, 25 to a screen. The notation in the lower right corner indicates there are 28 reports to choose from. A slider bar along the right side allow navigating up and down through the report list. In the lower left corner, arrows and page number buttons allow navigating to the second page of report.



Name ▲	Description ▼	SSRS Report Name ▼		
Performance Metrics (PJT)	Performance Metrics (PJT)	OTIS019_Performance_Metrics_PJT		
Performance Metrics - Dynamic	Performance Metrics-Length Of Time Per Workflow - Dynamic	OTIS019_Performance_Metrics_D...		
Performance Metrics - Dynamic (PJT)	Performance Metrics - Dynamic (PJT)	OTIS019_Performance_Metrics_D...		
Periodic Savings Balance		OTIS040_PeriodicSavingsBalance		
Program Update - Projects Removed/Cancelled	List of Projects that were cancelled/removed from a Program Update.	OTIS039_ProgramUpdate-ProjectsRemoved		
Project List Report	Project List Report Description	OTIS020_ProjectList		
Project/Corridor Funding Plan	Project/Corridor Funding Plan	OTIS011_Financial_Plate_Report		
STIP		OTIS026_STIP_Report		
STIP Amendment Supplement		OTIS028_STIP_Admdement_Su...		

1 - 25 of 28 items

Figure 23 - First Page of OTIS Reports List

As an example, let’s select the “Project List Report” by clicking on the report name.

This brings up the report criteria screen for this report.



Reports

Choose Program Year range start:

Choose Program Year range end:

Choose a District:

Project Status:

Report Tag:

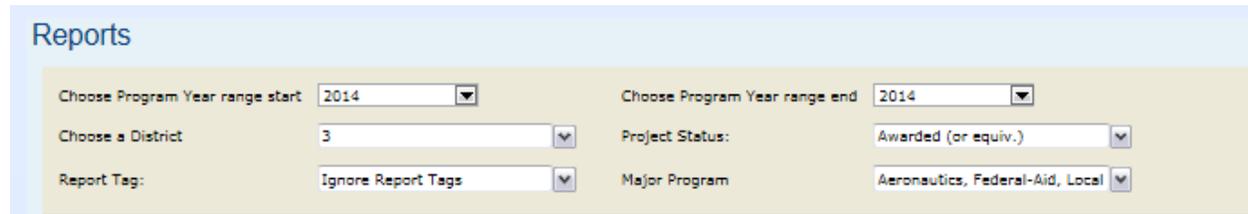
Major Program:

Figure 24 - Report Criteria Screen for Project List Report

This report requires the following variables:

- Program Year Range Start
- Program Year Range End
- District
- Project Status
- Report Tag
- Major Program

For the report, the **Program Year** is set to “2014”, the **District** is “3”, the **Project Status** is “Awarded”, the **Report Tag** variable is set to “Ignore Report Tags”, and the **Major Program** is set to “All Programs”.



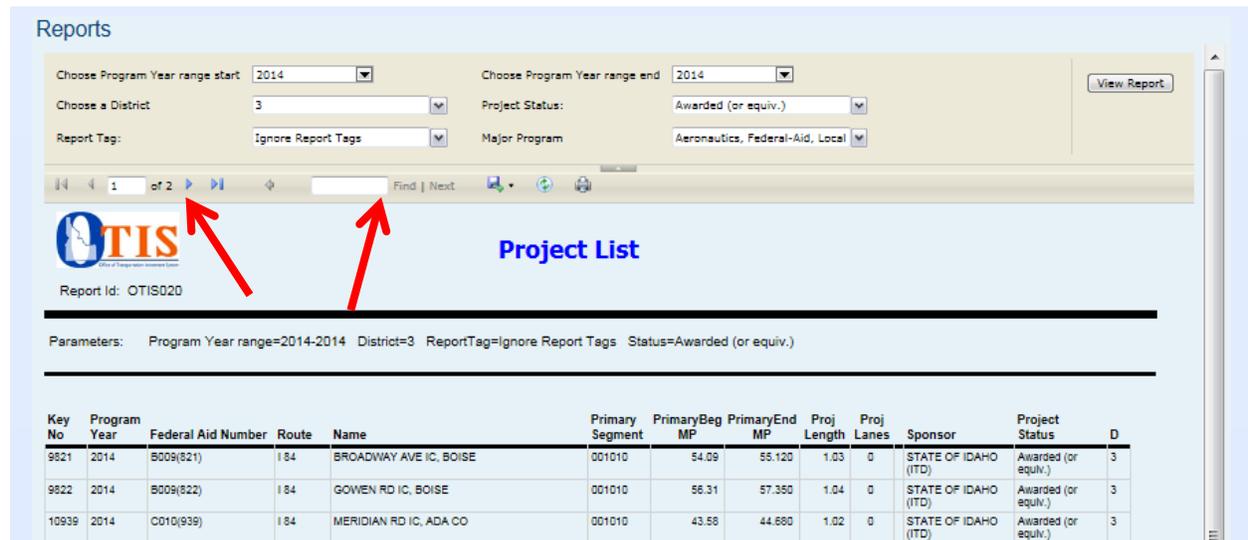
The screenshot shows a form titled "Reports" with the following fields and values:

- Choose Program Year range start: 2014
- Choose Program Year range end: 2014
- Choose a District: 3
- Project Status: Awarded (or equiv.)
- Report Tag: Ignore Report Tags
- Major Program: Aeronautics, Federal-Aid, Local

Figure 25 - Project List Report Selection Criteria Set

Once the criteria is set, select “View Report”. Using the criteria supplied, the following report is generated.

Controls at the top of the report allows navigating forward and backwards through the report. A “Find” search box facilitates searching for text strings in the report output.



The screenshot shows the "Project List" report output. At the top, there are navigation controls (back, forward, search) and a "Find | Next" search box. Below the navigation is the TIS logo and the report title "Project List". The report ID is "OTIS020". The parameters are: Program Year range=2014-2014 District=3 ReportTag=Ignore Report Tags Status=Awarded (or equiv.).

Key No	Program Year	Federal Aid Number	Route	Name	Primary Segment	PrimaryBeg MP	PrimaryEnd MP	Proj Length	Proj Lanes	Sponsor	Project Status	D
9821	2014	8009(821)	184	BROADWAY AVE IC, BOISE	001010	54.09	55.120	1.03	0	STATE OF IDAHO (ITD)	Awarded (or equiv.)	3
9822	2014	8009(822)	184	GOWEN RD IC, BOISE	001010	56.31	57.350	1.04	0	STATE OF IDAHO (ITD)	Awarded (or equiv.)	3
10939	2014	0010(939)	184	MERIDIAN RD IC, ADA CO	001010	43.58	44.680	1.02	0	STATE OF IDAHO (ITD)	Awarded (or equiv.)	3

Figure 26 - Project List Report Output

Next to the “Find” search box, there are icons for exporting and printing the report output.

If you select the diskette export icon, you get the following drop down which allows a selection of export file types.

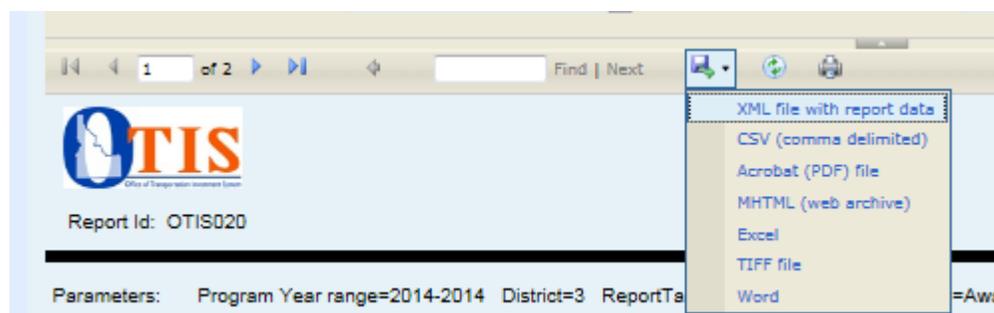


Figure 27 – Print Report Export File Formats

Although standard Microsoft print functionality is provided via the printer icon, the recommended printing approach is to i) export the report to PDF format and ii) review the PDF file and then if hard copy printing is still required, to print from PDF.

As you become more experienced with using OTIS and running reports, you may wish to add frequently used reports to your **OTIS Homepage** using **MyOTIS**. Just check off those reports you wish to include in your Homepage list and click **Update Profile**.

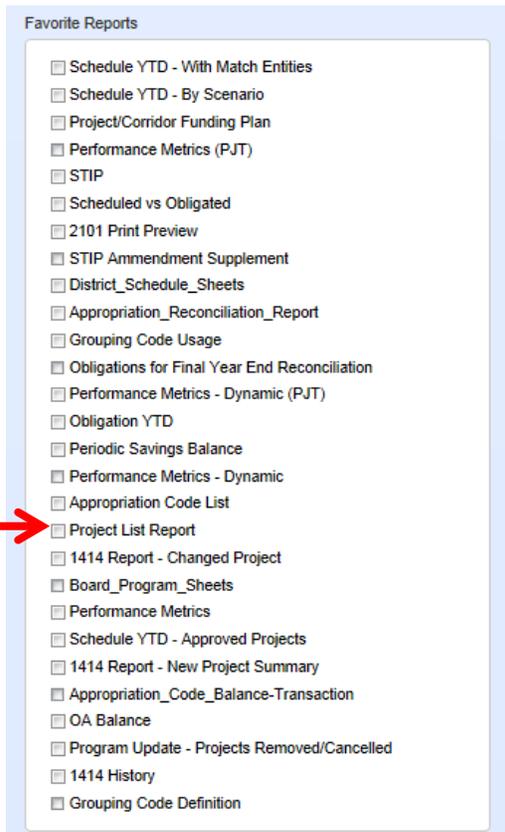


Figure 28 - Favorite Report Selection List from MyOTIS

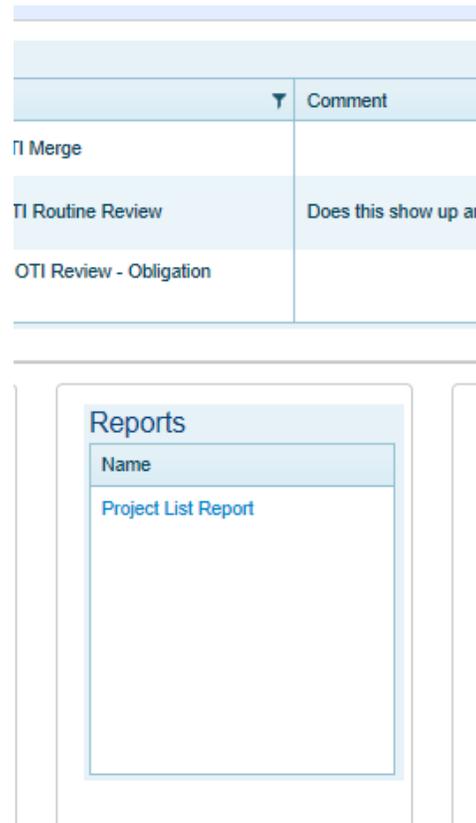


Figure 29 - Project List Report on Homepage

OBLIGATIONS

The **Obligation** tab in OTIS provides the ability to review prior obligation activity and to initiate new obligations.

The **Obligation Agreement Summary** section shows obligation amounts by phase by year.

The **Obligation Agreement History** section differs from the Summary section in showing an issue-by-issue accounting of prior obligations.

The **Summary Project Total Obligations** section provides a wrap up of obligation and match amounts by apportionment code.

The green **New Issue** button in the lower right corner is used to initiate a new Obligation Request issue.

The following screen shows the obligation summary and history for Key Number 13361.

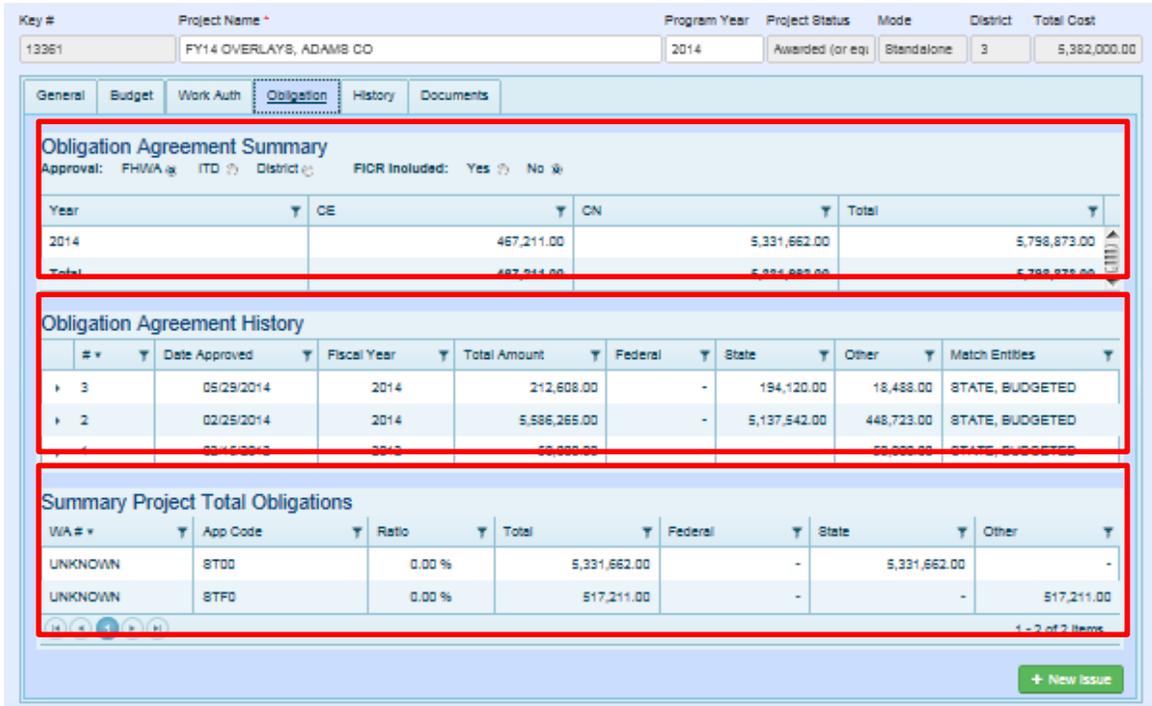


Figure 30 - Obligation Summary and History Screen

WRAPPING UP

PRACTICE AND QUESTIONS

At this point in the training, its important to spend some time in practice and should include the following topics:

- Project Lookup with GoTo Key Number and Advanced Search
- Reviewing Project Information Including Budgets, Scopes of Work, Locations and Obligations
- Extracting project information to exported files
- Running Reports
- Modifying the MyOTIS Environment

This is also a great time to ask questions that might dive deeper into areas you will encounter on a daily basis.

OTIS TROUBLESHOOTING

OTIS utilizes a web application centralized processing model and does not rely on decentralized data servers located in district offices. All data communications flows to the ITD data center located in Boise and web applications and reporting servers are located at HQ. This should permit acceptable response time for all OTIS users, but there are certain cases and times of the year when there may be a high level of contention for server and database resources.

In reacting to perceived system slowdowns or inordinately delayed response times, a good start to any troubleshooting is to discern whether there has been a system failure or users are experiencing slowness because of increased demands on the system.

For ITD internal users, since the same network is used for OTIS as for email and AMS, a good initial step in troubleshooting any apparent OTIS problems is to check whether email or AMS also appear to be affected.

For ITD external users, an easy way to validate OTIS connectivity in the event of an OTIS application failure is to check whether the ITD website at www.itd.idaho.gov can be accessed.

In either case, a first line of support to assist in trouble is the ITD ETS Service Desk at Service.Desk@itd.idaho.gov or (208) 334-8175.

Every effort has been made during OTIS development to ensure the accuracy of OTIS in performing arithmetic calculations related to ITIP financial operations such as obligation requests. What appear to be mathematical errors – especially in the early stages of OTIS use – should be reported immediately to OTIS business system administrators at ITD-OTIS@itd.idaho.gov.

OTIS USER MANUAL

APPENDIX

Cross-References to Project Tracking Screens

Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Search For Key No.: 13361

Program Year: 2014 Chapter: 10

Construction Cost: \$5,332 Obligation Date: 02/2014

Key No.: 13361 Route: US 95

Obligation Status: PS&E (or equiv) Obl for Award Date: 05/2014

District: 3 Work Auth: E123810

Project Status: Awarded (or eqt) OTI Close Date:

FA No.: A013(361) Public Land:

Sponsor: STATE OF IDAHO (ITD) Ntl. Forest:

Location: FY14 OVERLAYS, ADAMS CO Indian Resv:

Remarks: ALSO INCL SH55, SEGMENT 001990, 10.5 M Dist Comment:

Tag KeyNo for Special Reports:

RprtTag	LastUser
Do Not Bill Indirect Costs on Project	JFinch
* All KeyNos	

Program: 100 Pavement Preservation

Appropriation Code: ST00 Ratio: 0 Rank: 1

Eligible Source: State

Federal Aid Limit: (Enter in dollars)

Record: 1 of 2 No Filter Search

Budget & Obligations Summary Project Data Exit

PJT 1 - Main Info Screen for Project

Transaction Entry For Projects - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Key: 13361 Program: 100 Pavement Preservation

Entry Initials: Entry Type: B - Minor increase within t Eligible Src: 70-State

Approved Date: 6/16/2014 Prog Status: Active

Entry Date: 6/16/2014 4:54:11 PM Fed. Ratio: 0.0000 2014

Scheduled (\$000s) to 6/16/2014

Year	PE	PC	RW	UT	CE	CN	Total	Year	MatchSource	Ratio
2014	0	0	0	0	0	5,332	5,332	2014	STATE OF IDAHO (ITD)	1.0000
*	0	0	0	0	0	0	0	*		0.0000
							5,332	5,332		

Obligations (\$000s) to 6/16/2014

Year	PE	PC	RW	UT	CE	CN	Total
2015	0	0	0	0	50	0	50
2014	0	0	0	0	0	5,332	5,332
2012	50	0	0	0	0	0	50
							5,432

Ttl Prog: 50 0 0 0 0 5,332 5,382

FA: 0 0 0 0 0 0 0

Approval: FHWA ITD District

FICB? Yes No

Program Supplement: Trans. Memo: 2101 Issue 4 Recalc TP

Action Memo: \$50k offset provided from KN 11052 New To 2101

Latest Next 1 of 8 Previous Earliest Delete Exit

PJT 2 - Budget Detail Screen

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Cross-References to Project Tracking Screens

Project Management Data - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Project Data KeyNo 13361 Performance Measures Exit

Update 6/16/2014 KeyNo 13361 Year 2014 Chapter 10 Status Awarded (or equiv) Budget Code 603523

Location FY14 OVERLAYS, ADAMS CO County % Project Totals RoadSeg 001540

FA No. A013(361) Co1 ADAMS 100% PE \$ 50 BegMP 136.400

Wrk Auth E123810 Co2 0% PE Con \$ 0 EndMP 161.000

Route US 95 District 3 Co3 0% RW \$ 0 Length 35.150

RtType FunctCls 02 Oversight 9 Co4 0% Util \$ 0 Rail #

Lanes 2 Sponsor STATE OF IDAHO (IT) Co5 0% CE \$ 517 RR_Rank 0

Remark ALSO INCL SH55, SEGMENT 001990, 10.5 MILES 100% Const \$ 5,332 Bridge #

DistCom Prog St/Loc 70 Total 5,899 BrIndex 0

Indian Resv National Forest PavIndex 0

Public Land Cong Dist(s) (Ada Co) 1 BcRatio 0

Wkcls RESRF/RESTO&REH CompFg 0 MulFlg 1 MinrFlg 1 Aqstip IniDate 02/2012

SubC11 PlmxxPav CompKey1 P353 MultKey1 Cir R Flg 0 RegStip 0 OBDate 02/2014

SubC12 CompKey2 MultKey2 Cir G Flg 0 Mpostip 0 Award 05/2014

SubC13 CompKey3 MultKey3 PavFlg 0 Othstip Complete

SubC14 CompKey4 MultKey4 CostFlg 0 EnvStip PrevYr 2014

SubC15 CompKey5 MultKey5 OthSeq 3 DistPrio 0

SubC16 Number of Projects UrbanCode Rural, pop. less than 5,000

SubC17 Number of FIPSCode New Meadows

Append Changes to 2101 Remarks

Concept

Program:	Eligible Source:	Hwy Programming Comment
Pavement Preservation	State	
State Forces	Other State Categories	
*		

Record: 1 of 2 No Filter Search

PJT 3 - Project Data Screen

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Cross-References to Project Tracking Screens

A View Previously Approved 1414 - Read Only - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

View KeyNo 13361		PREVIOUSLY APPROVED PROGRAM					KeyNo	13361
Date	7/16/2014	Route	US 95		Fed Aid Route	11/27		
Fiscal Year	2014	Project No.	A013(361)		Project Name	FY14 OVERLAYS, ADAMS CO		
Segment Code	001540	No. Lanes	2	Length	35.15	Cost/Lane-Mile	84	
Beg. km/MP	136.400	End km/MP	161.000	Type Work	7 - RESURFACE/RESTORE/REHABILITATE/WIDEN			
SubCls (1-3)	8 - Plant Mix Pavement		0 -		0 -			
SubCls (4-7)	0 -		0 -		0 -			
Sponsor	STATE OF IDAHO (ITD)		Budget Code	603523	Bridge#	RR Crossing#		
Lifetime Totals (\$000s)	PE	PE Cnslt	RW	Util	CE	Const	Total	
	50	0	0	0	517	5,332	5,899	
							Make Changes	Print
							New/Unsubmitted	Exit

Program: 100 - Pavement Preservation **Last Action:** 6/16/2014 [To 2101](#)

Scheduled (\$000s)								Hard Obligations (\$000s) from 2101s							
Year	PE	PEC	HW	Util	CE	Const	Total	Year	PE	PEC	RW	Util	CE	Const	Total
Prev	50	0	0	0	50	5,331	5,431	2015	0	0	0	0	50	0	50
								2014	0	0	0	0	0	5,331	5,331
								2012	50	0	0	0	0	0	50
Total	50	0	0	0	0	5,332	5,382	Total	50	0	0	0	50	5,331	5,431

[First](#) [Previous](#) 1 of 2 Funds [Next](#) [Last](#)
[Match Specs](#) [New Fund](#) [Delete Fund](#)

County and % (1-5)	02 - ADAMS	100%	00 -	0%	00 -	0%	00 -	0%	00 -	0%
Reservation			Public Lands			National Forest				
Companions (1-5)	P353					(M) <input checked="" type="checkbox"/>	(R) <input type="checkbox"/>	(G) <input type="checkbox"/>		

1414 History [Print History](#)

Approved	Amount	Comments or Major Change Reference
2/6/2012	5,110	Add to program, Offset by KN SEQ30
8/21/2012	5,230	Incr \$130k, offset from KN 11573
10/1/2012	5,201	FY13 Program Update per 9/20/2012 Board action
10/1/2013	5,046	FY14 Program Update per 9/19/2013 Board action
2/25/2014	5,636	per ITD-2101 Issue 2; obligate const for State FY14, \$118k from KN 13353, ITD-1414 Appr 02/13/14; \$369,594 from KN 129
5/29/2014	5,849	per ITD-2101 Issue 3; for Detailed Estimate, increase offset from State FY2014 year-end
*		

PJT 4 - 1414 Project Change Request Screen

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Cross-References to Project Tracking Screens

frmITD2101 - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

KEY 13361	WA	E123810	FA No.	A013(361)	Hwy Type	P	FHWA System	N			
County	(003)ADAMS-100%						FIPS Code	56890			
District	3	Budget Code	603523	Location	US 95, FY14 OVERLAYS, ADAMS CO		Urbanized	R			
Auth. Yr.	2014	Inventory Route No.	001540136400	Beg MP	136.400	End MP	161.000	Length	35.150M	RWDDate	8/20/2013
SF Cost Effective		Cong. District	1	FHWA Oversight		Env Decisn		Env Verification			
Indian Resrv		Public Lands		Forest Hwy		Donation		Show	Description		
FS Type Code	S	Type of Work	RESURFACE/RESTORE/REHABILITATE/WIDEN					Donation	Shares		

2101 Transactions										Rule A		Rule B	
Fct.	Issue#	Date	Imprv Type	Description	IC	Prog	Appr	Appr Grp	Participating	State Funds/ Non-Participating			
PE	1	02/16/12	15	State Forces		100	STF0	1	0.00	50,000.00	nea		
CE	2	02/25/14	17	State Forces		73	STF0	1	0.00	448,723.00	rlaf		
CN	2	02/25/14	04	Contract Work		100	ST00	1	0.00	4,487,232.00	rlaf		
CN	2	02/25/14	04	Contract Work	Contingency	100	ST00	1	0.00	224,362.00	rlaf		
CN	2	02/25/14	04	Contract Work	non-bid items	100	ST00	1	0.00	425,948.00	rlaf		
CE	3	05/29/14	17	State Forces		73	STF0	1	0.00	18,488.00	rlaf		
CN	3	05/29/14	04	Contract Work		100	ST00	1	0.00	184,876.00	rlaf		
CN	3	05/29/14	04	Contract Work	Contingency	100	ST00	1	0.00	9,244.00	rlaf		
CC	4	06/16/14	04	Contract Work		100	ST00	1	0.00	50,000.00	mg		
*	0												

Appr	Calc. Ratio	Total Est. Cost	Federal Share	State Share	Other Share	Non-Participating
STF0	0.00	517,211.00	0.00	517,211.00	0.00	0.00
ST00	0.00	5,381,662.00	0.00	5,381,662.00	0.00	0.00
Totals	0.00	5,898,873.00	0.00	5,898,873.00	0.00	0.00

Print 2101 for KeyNo

Partial Print

Print To: **Key No** 13361

Printer

Screen

Issue # 4

Appr Balance

View Program

Information per Issue

Information per Issue

Remarks: 13361 Issue # 4 Original Bill Indirect Costs? Yes No Rate: 0.00%

This project is being revised to INCREASE total costs by \$50,000.00 of ST00 funds for CC to pay for consultant inspection.

\$50k Offset provided from KN 11052. ACTION DISTRIBUTED FROM STATE FY2015

Initiator/Date	ITD Requesting Official/Date	2PM Reviewer/Date	Obligation Purpose
	MICHAEL GARZ, EM	Donna Hunstinger	Post-award increase
District Posted	6/12/2014	6/13/2014	Prior-Year? <input checked="" type="checkbox"/>
Financial Services/Date	OTI Reviewer/Date	FHWA Official/Title/Date	
	ne	NO ACTION IN FMIS, N/A	
	6/16/2014	ITD Posted	6/16/2014
		FHWA Posted	

Next to Act on 2101: Comment

Approved FHWA Response

Mj Program: ST on SHS

Latest	Next	4 Issues	Previous	Earliest
New	Delete	Exit		

FY: 2015	Appr Code	Fed Doc #	Total Obligated
	ST00	Jun 2014	0.00

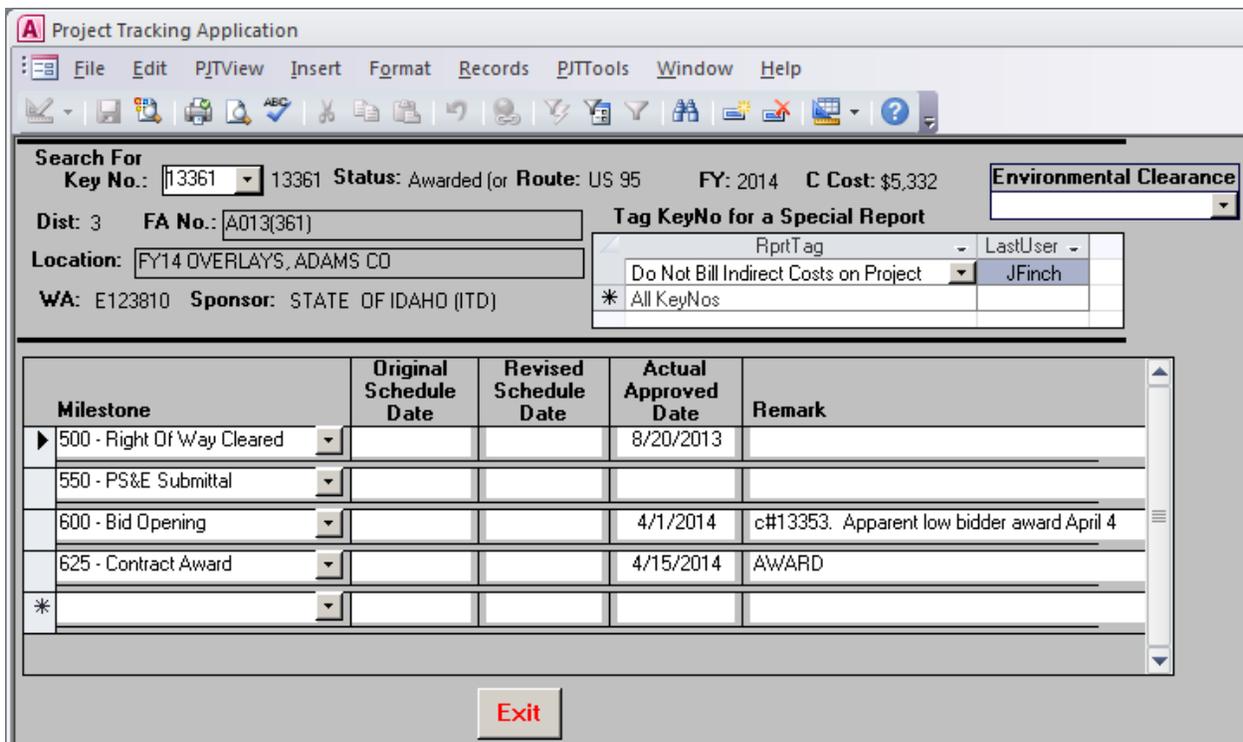
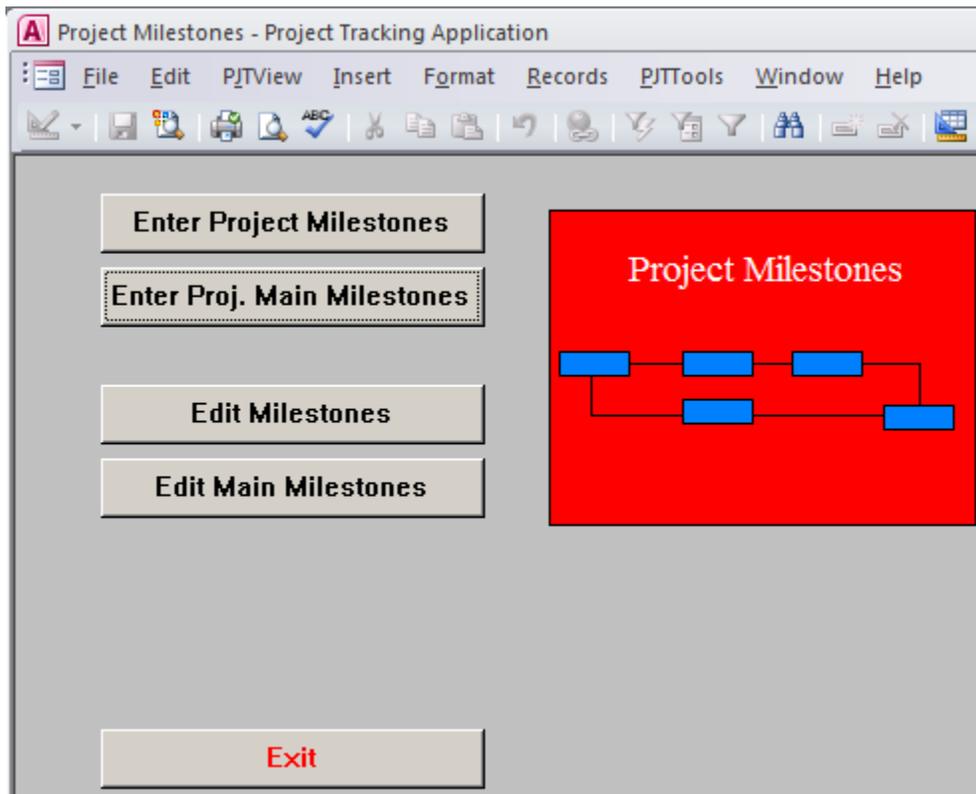
Refresh Fed Doc To Offsets
Last Changed By: hmoore

PJT 5 - 2101 Obligation Request Issue Screen

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Cross-References to Project Tracking Screens



PJT 6 - Project Milestone Screens

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Cross-References to Project Tracking Screens

Reports - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Select report to print:

- Milestone Report
- Obligations YTD w/Match (ITD-2101s)
- Obligations YTD FA Only (ITD-2101s)
- Quarterly Balancing Releases
- Quarterly Balancing Increases
- Apportionment Reconciliation Report
- Schedule YTD w/Match (ITD-1414s)
- PE Scheduled vs Obligated
- RW Scheduled vs Obligated
- CN Scheduled vs Obligated
- Project List
- District Schedule Sheets

Description:

Report shows State-Funded projects and their unexpended obligations (carryover) from the previous fiscal year. Obligations from the previous year are held constant while expenditures are reported to date in order to show our utilization of carryover on t

General Selection Criteria (a project must meet all criteria to be displayed)

Output to:	Fiscal Years:	Transaction Date Range:	Districts:	MPD Area:	ITIP Selection:
<input type="radio"/> Default Printer	From: 2014 To: 2018	From: 1/1/1980 To: 7/17/2014	<input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5 <input checked="" type="checkbox"/> 6 <input checked="" type="checkbox"/> 9	Don't Limit <input checked="" type="radio"/> Inside <input type="radio"/> Outside	<input checked="" type="radio"/> All Projects <input type="radio"/> Individually Listed Projects <input type="radio"/> Grouped Projects
<input type="checkbox"/> Report Header	<input type="checkbox"/> Show No Details <input type="checkbox"/> Export to Excel			Limit to Tag: All KeyNos	<input type="checkbox"/> STIP Header <input type="checkbox"/> Match <input type="checkbox"/> Balance <input type="checkbox"/> Approved 7/16/2014 <input checked="" type="checkbox"/> Footer One-Liner No

ITD-2101 Criteria	Scheduled Budget Selection Criteria	Milestone Report:
Approval Progress: <input type="radio"/> FMIS <input type="radio"/> FHWA <input checked="" type="radio"/> ITD <input type="radio"/> District	Project Status: <input checked="" type="checkbox"/> Development <input checked="" type="checkbox"/> PS&E (or equiv) <input checked="" type="checkbox"/> Awarded (or equiv) <input type="checkbox"/> Project Closed <input type="checkbox"/> Horizon <input type="checkbox"/> Removed	<input type="text"/>
FICR? <input type="radio"/> Yes <input checked="" type="radio"/> No	Show PREL? <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Only	Phase Costs: None
	Supplement Heading: <input type="text"/>	Sorting Options: Year, District, KeyNo (ITIP Sort)

Grouping Options

Financial:	<input checked="" type="radio"/> Program Grouping Highway Program (System) <input type="button" value="Edit"/> <input type="radio"/> Eligible Source Grouping <input type="button" value="Edit"/> <input type="radio"/> Apportionment Grouping <input type="button" value="Edit"/>	<input type="button" value="Search"/> <input type="button" value="Report"/> <input type="button" value="Exit"/>
Other:	<input type="radio"/> Milestone Grouping <input type="button" value="Edit"/> <input type="radio"/> Performance Measure <input type="button" value="Edit"/>	

If in doubt, use the default (blue) options. Invalid options for a given report are ignored.

PJT 7 - Report Selection Screen

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APPENDIX

Cross-References to Project Tracking Screens

ITD-2101 Routing - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Department to View: View 2101 Exit E-Mail to:

Key No.	Issue #	FA No.	Work Authority	Date/Time Sent	Sent by:	Comment
00043	9	I-90-1(055)26	I801040-Closed	4/25/2002 11:57:33 AM	FHWA (S Healy)	History to match Final Voucher
00048	6	ID-I-90-1(074)61	I901410-Closed	6/3/2002 8:15:58 AM	Approved (S Healy)	Final Voucher
00049	8	ID-90-1(075)61	I881360-Closed	6/3/2002 1:27:32 PM	Originator (N Edl)	Final Voucher
00055	19	ID-I-90-1(089)16	I821020-Closed	5/30/2002 10:00:30 AM	OTI Review (N Edl)	Final Voucher
00062	12	ID-I-90-1(101)16	I831050-Closed	7/18/2001 3:25:28 PM	FHWA (K Smith)	Final Voucher
00088	22	NH-CM-3250(101)	P923750-Closed	4/11/2012 10:26:26 AM	AMS Entry (G Lough)	Final Voucher
00142	27	STP-F-4171(003)	P922380-Closed	11/15/2007 2:34:27 PM	Originator (N Edl)	Final Voucher
00494	7	IM-90-1(119)12	I801280-Closed	7/26/2001 8:38:27 AM	FHWA (S Healy)	withdrawn
00519	26	IM-90-1(190)10	I951510-Closed	5/24/2011 9:16:48 AM	AMS Entry (G Lough)	Final Voucher
00556	35	STP-BR-5726(100)	X011360-Closed	7/10/2014 12:47:01 PM	AMS Entry (H Moore)	
00557	26	BRS-5726(007)	X811020	10/21/2013 7:22:13 AM	AMS Entry (H Moore)	
00558	17	BRS-5726(008)	X811010-Closed	3/12/2013 9:58:48 AM	AMS Entry (G Lough)	Final Voucher
00598	19	BRF-STP-5152(025)	P831030-Closed	7/19/2002 7:22:40 AM	FHWA (S Healy)	Final Voucher
00685	31	NH-STP-F-IR-3112(033)	P803160-Closed	7/30/2002 12:53:58 PM	FHWA (S Healy)	Final Voucher
00688	25	NH-3271(026)	P803120-Closed	4/28/2011 12:31:20 PM	AMS Entry (G Lough)	Final Voucher
00698	9	NH-4113(056)	P992920-Closed	7/31/2013 8:39:47 AM	AMS Entry (D Walters)	withdrawn
00713	38	STP-NH-CM-F-5116(026)	P871260-Closed	10/30/2009 8:16:57 AM	FHWA (G Lough)	Final Voucher
00717	31	NH-F-5121(019)	P871250-Closed	4/24/2007 12:11:29 PM	Originator (N Edl)	Final Voucher
00757	15	NH-1481(037)	P925230-Closed	6/13/2012 8:10:44 AM	AMS Entry (G Lough)	Final Voucher

PJT 8 - 2101 Queue Status Screen

Key Field Search - Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help Typ

Filter data by these criteria: Check a criterion to limit projects displayed to that chosen in the corresponding combo box. Right-click on fields of interest for additional filter and sorting options. Clear Exit

Partial matches are possible
Multiples per KeyNo and partial matches are possible

Years: 2014

KeyNo: 13361 Work Authority: 2018 Status: \$000: Dist: Route: County 1: Segment: Maj Prog:

KeyNo	Work Authority	FA No.	Location Phrase	Years	Status	Dist	Route	County 1	Segment	Maj Prog		
13361	E123810	A013(361)	US 95, FY14 OVERLAYS, ADAMS CO	2014	5,899	warded (or equi	3	US 95	ADAMS	001540	136.4	ST on SHS

PJT 9 - Key Field Search

OTIS USER MANUAL

APPENDIX

Cross-References to Project Tracking Screens

Project Tracking Application

File Edit PJTView Insert Format Records PJTTools Window Help

Search For Key No.: 13361 Status: Awarded (or equiv) Route: US 95 FY: 2014
 Program: ST on SHS

Dist: 3 Sponsor: STATE OF IDAHO (ITD) FA No: A013(361)
 Location: FY14 OVERLAYS, ADAMS CD Wrk Auth: E123810

Work Authority:	WA Suffix	Date Work Authority Established	Date Work Authority Expired	FA No. during Date Range
E123810		02/14/2012	12/31/9999	A013(361)
*		07/16/2014	12/31/9999	

PJT 10 - Work Authority Summary Screen

