Idaho Transportation Department

OTIS User Manual

Office of Transportation Investment Systems

V2.14

2023

CONTENTS

GETTING STARTED

HINTS AND TIPS FOR WORKING WITH A WEB APPLICATION

OTIS is a web application. It does not require any special software to use, just a network connection and a copy of Microsoft Internet Explorer. For the most part, OTIS does work with other web browsers, like Chrome, Firefox, or Safari, but Internet Explorer is the only browser guaranteed to be compatible with OTIS.

As a web application, OTIS users are **not** required to have a connection to ITD's network. Users can access OTIS from anywhere via the internet, with the same level of access as if they were on ITD's network.

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

DO – open multiple tabs or windows for different sections of OTIS (Home, Edit Project, Reports, etc.).

DON'T – open multiple sections of the same type, especially the Edit Project screen (OTIS may get confused as to which one to update).

DO - use the controls provided within the application

DON'T – use the forward and back browser buttons to navigate. Any data you entered or search results you generated may be gone when you return to them.

DO – use the CTRL-F hot-key combination to 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 network traffic on your internet connections.

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

How do I get to OTIS?

There are two different web addresses for OTIS. The first is for use **within** ITD's network:

http://otisweb/otis.web

Users with an ITD user name and password will be logged into OTIS automatically and taken to their Home screen when they direct their web browser to the internal address.

The second address is for users **outside** of ITD's network:

https://apps.itd.idaho.gov/Apps/OTIS.Web

Note: The outside address **used to be** https://otisweb.itd.idaho.gov, which is now obsolete.

Unlike the internal address, which logs users in automatically, external users must enter their email address and OTIS password manually.

All ITD users receive read-only access automatically, so an official account is unnecessary for them. However, if you need write access, or need to access OTIS from the outside address, you will need an account.

How do you obtain an OTIS account? ITD users should send an email request to ITD-OTIS@itd.idaho.gov. External users should visit the external address and click the "Request Access" link.

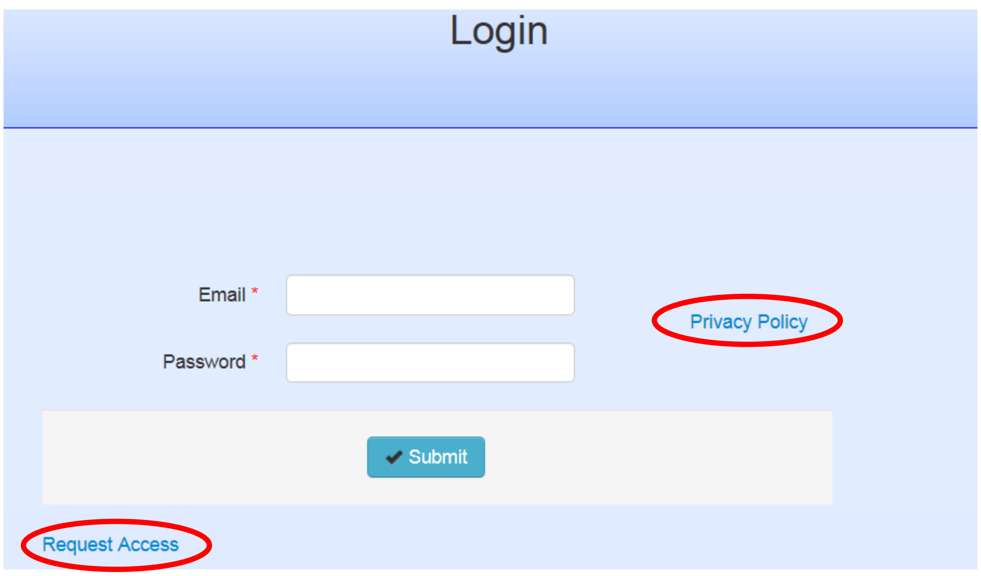


Figure 1 - Logon Screen at the OTIS Internet portal

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:

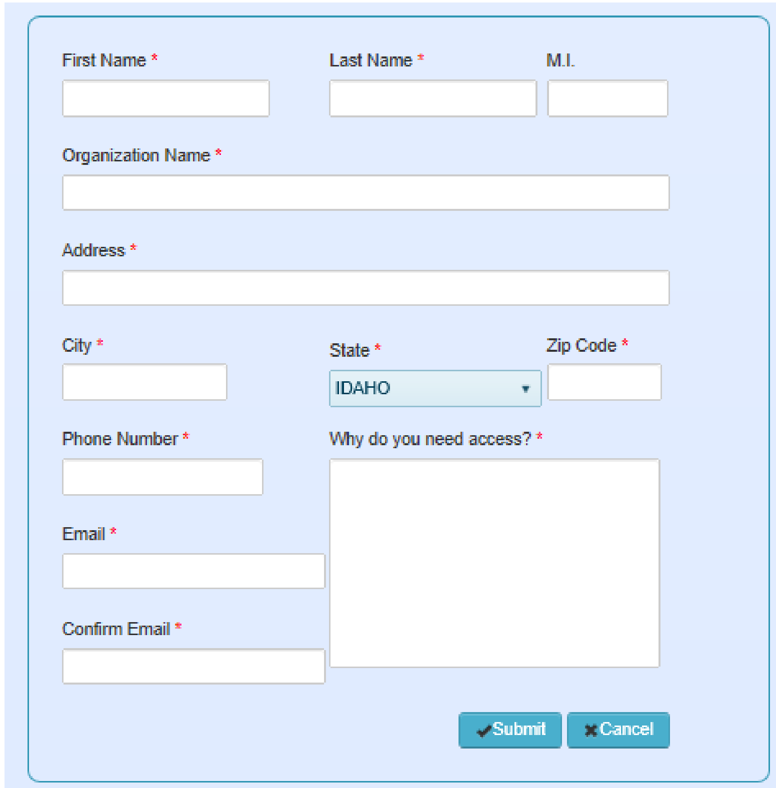
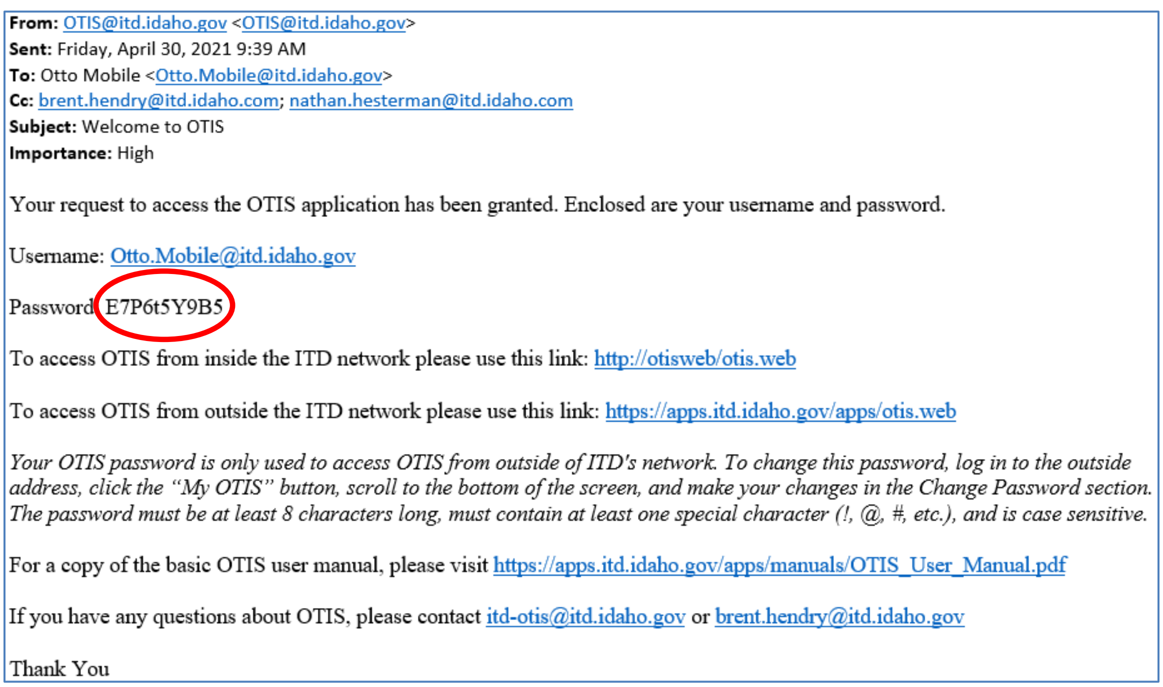


Figure 2 - New External User Information Screen

Provide all requested information, and then click on “Submit”. Once your account is finalized, OTIS will send you a standardized “Welcome to OTIS” email.



From: OTIS@itd.idaho.gov <OTIS@itd.idaho.gov>
Sent: Friday, April 30, 2021 9:39 AM
To: Otto Mobile <Otto.Mobile@itd.idaho.gov>
Cc: brent.hendry@itd.idaho.com; nathan.hesterman@itd.idaho.com
Subject: Welcome to OTIS
Importance: High

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

Username: Otto.Mobile@itd.idaho.gov

Password: E7P6t5Y9B5

To access OTIS from inside the ITD network please use this link: http://otisweb/otis.web

To access OTIS from outside the ITD network please use this link: https://apps.itd.idaho.gov/apps/otis.web

Your OTIS password is only used to access OTIS from outside of ITD's network. To change this password, log in to the outside address, click the "My OTIS" button, scroll to the bottom of the screen, and make your changes in the Change Password section. The password must be at least 8 characters long, must contain at least one special character (!, @, #, etc.), and is case sensitive.

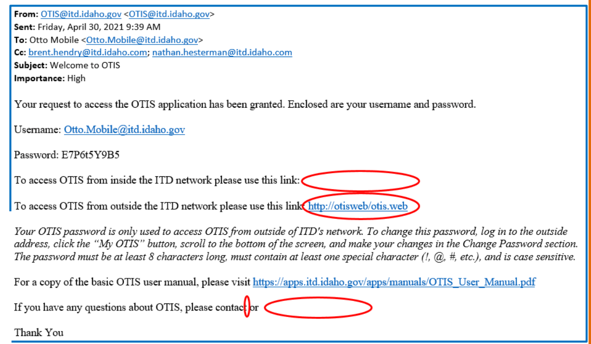
For a copy of the basic OTIS user manual, please visit https://apps.itd.idaho.gov/apps/manuals/OTIS_User_Manual.pdf

If you have any questions about OTIS, please contact itd-otis@itd.idaho.gov or brent.hendry@itd.idaho.gov

Thank You

Figure 3 – What the "Welcome to OTIS" email should look like

As of this writing there is a bug that scrambles some of the information in the welcome email. If the internal address is blank, the external address shows the internal address, and/or the contact email addresses are missing, then please refer to Figure 3 for the correct information. Note also that the password description is incorrect: the current format permits, but no longer requires, special characters (!, @, #, etc.).



From: OTIS@itd.idaho.gov <OTIS@itd.idaho.gov>
Sent: Friday, April 30, 2021 9:39 AM
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Cc: brent.hendry@itd.idaho.com; nathan.hesterman@itd.idaho.com
Subject: Welcome to OTIS
Importance: High

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Username: Otto.Mobile@itd.idaho.gov

Password: E7P6t5Y9B5

To access OTIS from inside the ITD network please use this link:

To access OTIS from outside the ITD network please use this link: http://otisweb/otis.web

Your OTIS password is only used to access OTIS from outside of ITD's network. To change this password, log in to the outside address, click the "My OTIS" button, scroll to the bottom of the screen, and make your changes in the Change Password section. The password must be at least 8 characters long, must contain at least one special character (!, @, #, etc.), and is case sensitive.

For a copy of the basic OTIS user manual, please visit https://apps.itd.idaho.gov/apps/manuals/OTIS_User_Manual.pdf

If you have any questions about OTIS, please contact or

Thank You

Figure 4A – What the "Welcome to OTIS" email *might* look like

The password included in your welcome email is only used to access OTIS via the **external** address. To change the password, log in to the external address and click on the "My OTIS" button in the upper right corner of the screen. OTIS passwords must include at least eight alpha-numeric characters, including one capital letter, one lowercase letter, and one number. Special characters are permitted (!, @, #, etc.), but not required.

If you access OTIS via the **internal** address, OTIS recognizes you automatically without a password. If you ever get a pop-up window asking for User Name and Password, it most likely wants your ITD name and password.

Remember: ***For ITD internal users, changing your OTIS password from within My OTIS does not change your 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, To Do List, and Reports homepage areas;
- Search for specific projects by Key Number using the Go To 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.

LOG IN TO OTIS

If inside ITD's Network . . .

- Navigate to URL http://otisweb/otis.web
  You will be passed through OTIS security and taken to your OTIS home page automatically.

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

- Navigate to URL https://otisweb.itd.idaho.gov/
- Log in with a valid user ID / Password combination.
- If your permissions changed or you haven't logged in recently, you may be required to read the Privacy Policy first.

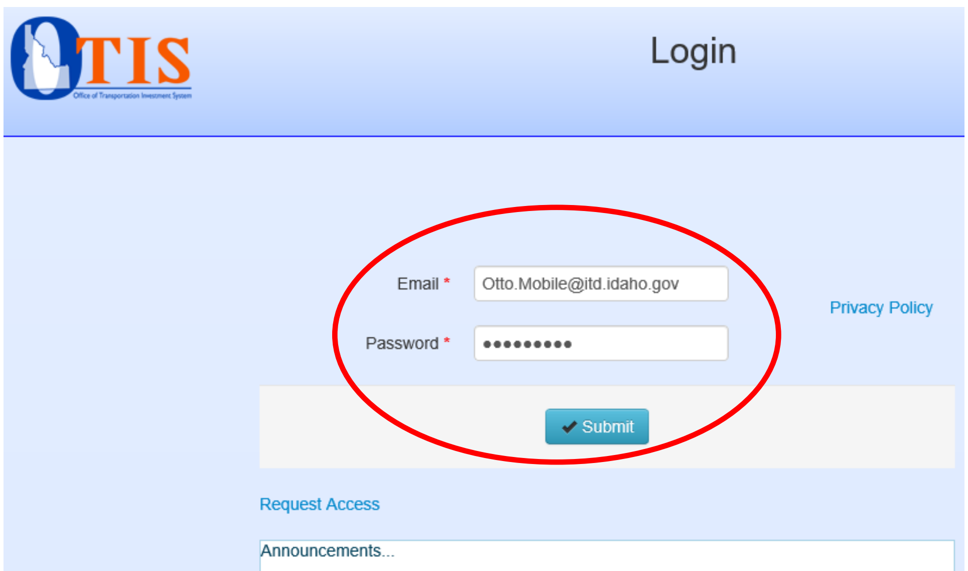


Figure 4 - OTIS Internet Logon Portal

Problems logging in…

- Misspelling the Email address *or* Password will result in an "invalid credentials" warning.
- After three incorrect passwords OTIS will lock your account. Please contact an OTIS administrator to get it unlocked.
- If you forget your password, please contact an OTIS administrator to begin the password replacement process. You'll receive a New Password email with a new, temporary password.

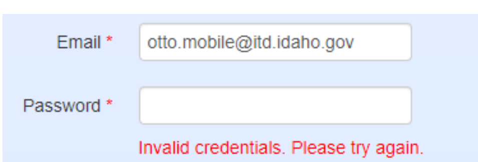


Figure 4A – Invalid Credentials Warning

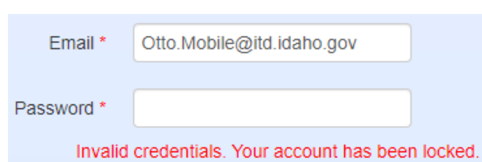


Figure 4B – Locked Account Warning

HOME PAGE

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

Let's take a quick tour:

1. ***Go To Key Number***: To get information on a project, enter a valid key number in the "Go To Key Number" field and click "Go" or press Enter.
2. ***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.
3. ***Alerts***: A list of updates on pending tasks, notices, overdue items, etc. Click the little circled "i" to read the alert's text. Click the title of the alert to go directly to the affected project or request. To mark an alert as read or unread, or to delete it, click its checkbox and then the appropriate button at the bottom of the Alerts section.
4. ***Reports***: Assign your favorite reports to this list for easier access. The list is controlled on the My OTIS screen.
5. ***My OTIS***: Click on "My OTIS" to select personalized reports, change your password, etc. (Passwords can only be changed while logged in via the external address!).

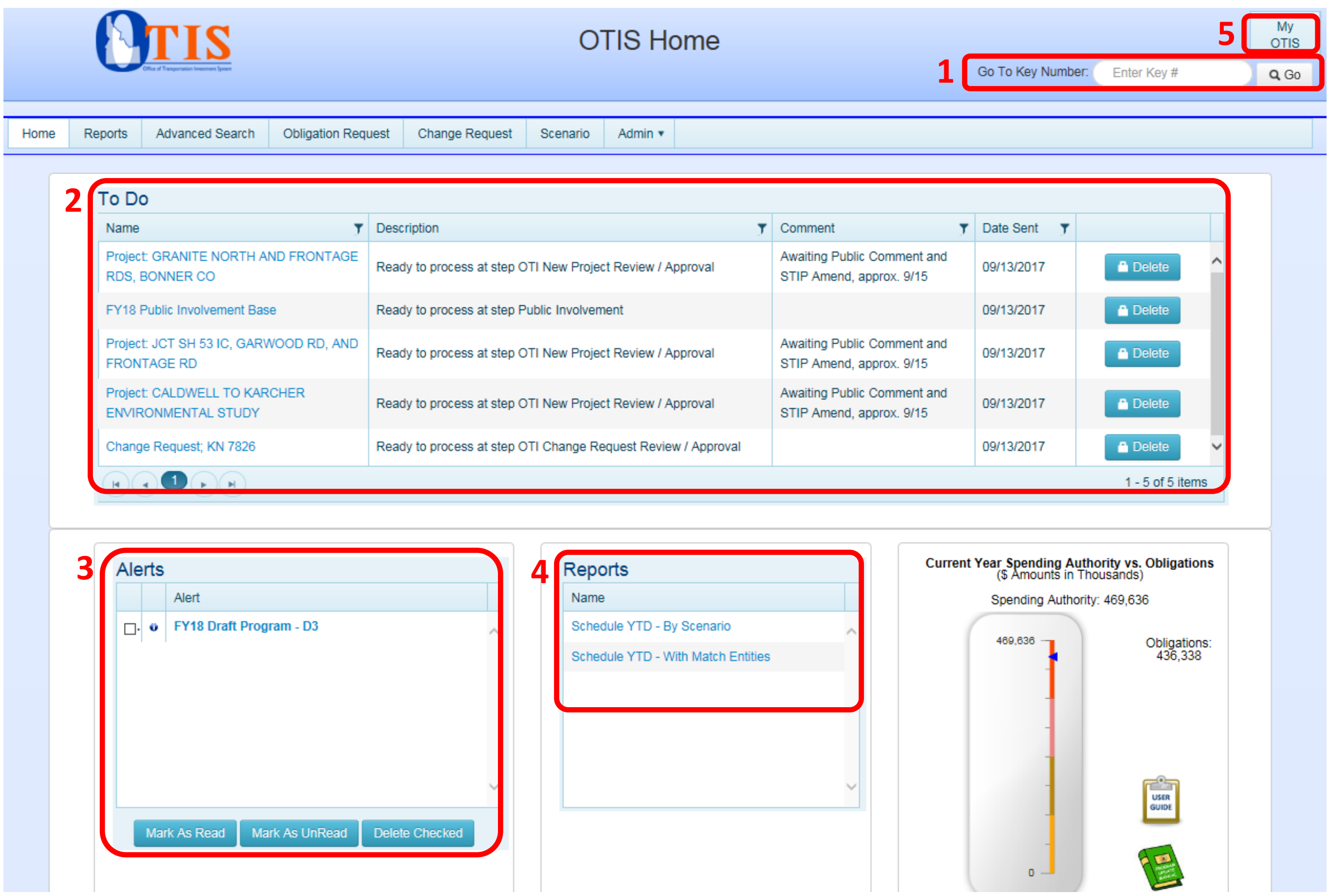


Figure 5 - OTIS Homepage Screen

Practice Exercise: Try entering some key numbers of interest into the ***Go To Key Number*** field and click on ***Go***. This will send you to the Edit Project screen showing various details for your project. Don't worry, we'll spend more time going over the different screens and tabs in an upcoming section.

OTIS MENUS

Users navigate between different sections of OTIS by using the menus that appear at the top of each screen. The exact number varies depending on user permissions, but there is a maximum of seven.

Figure 6 – The Full Set of OTIS Navigation Menus

- ***Home***: Jumps to the Home screen, which is described on the previous pages.
- ***Reports***: Jumps to the Reports screen, where users can run reports on a variety of OTIS data.
- ***Advanced Search***: Jumps to the Advanced Search screen, where users can find projects without using a key number.
- ***Obligation Request*** Takes user to a list of active obligation requests.
- ***Change Request***: Takes user to a list of active change requests.
- ***Scenario***: Takes user to a list of draft transportation program scenarios.
- ***Admin***: Takes user to a list of administrative tools.

If your navigation menus look like Figure 6A—Beware! OTIS has temporarily forgotten who you are and dropped you into the lowest of read-only modes. Other symptoms include OTIS displaying your name as “System System” or the Save and other various buttons disappearing.

Fortunately this is easy to fix: Simply click on the Home menu and OTIS should reconnect your account. If you do not want to disturb your current screen, try opening the Home page in a different tab or window instead.

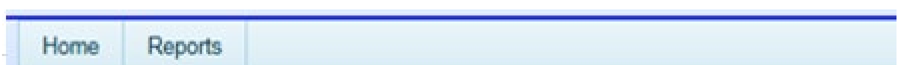


Figure 6A – The Minimal Set of OTIS Navigation Menus

ADVANCED SEARCH

The ***Go To Key Number*** search field at the top of each screen allows you to quickly retrieve information for a project, but what if you don't know the project's key number? That's where the Advanced Search screen comes in handy. It contains nearly 20 different fields to mix and match as you try to locate your projects. For example, if you are trying to find a bridge replacement project in District 1 that is programmed for FY2020, set Program Year to "2020", District to "District 1", and Performance Program to "Bridge Restoration", and then click "Search".

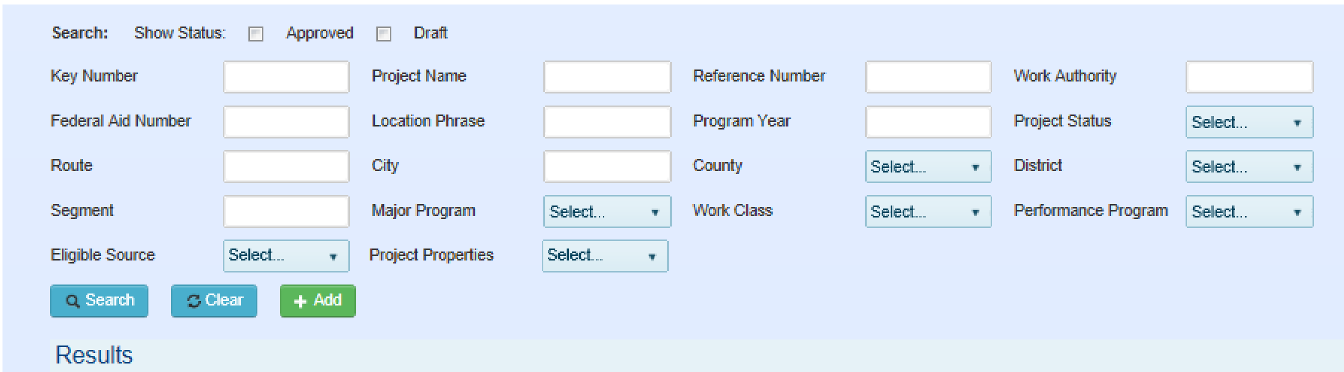


Figure 7 - Advanced Search Screen

At the top of the criteria are checkboxes for "Approved" and "Draft". In this context Draft projects are those that haven't been assigned key numbers yet. If your search includes a record with a blank key number, click the Approved box and search again to get rid of it.

Key Number: If you think you know the Key Number, but aren't sure, try entering it here first to verify it. This field only recognizes a complete key number.

Project Name: Search for a fragment of the project's name. For example, "bridge" will return all projects with "bridge" anywhere in their name.

Reference Number: Search for a project's temporary key number. It is a "begins with" search, so searching for "ORN00" will return all temporary key numbers between ORN00000 and ORN00999, while searching for "999" will return nothing because all reference numbers start with a prefix like ORN or ARN.

Work Authority: Search for any work authority associated with a project. Like Project Name, it will search for any fragment you enter ("E17" will return E171000 through E179999; "151" will include both 0451510 and E151550).

Federal Aid Number: Search for any Federal aid number associated with a project. Like Project Name, it will search for any fragment you enter.

Location Phrase: Skip this field. It is not used consistently and may be removed in the future.

Program Year: Search for the program year assigned to a project. It only recognizes years from 1990 and 2999.

Project Status: Search by the project's current status (Development, Awarded, Closed, etc.). Pick from a drop-down list.

Route: Search for a project's primary route. Like Project Name, it will search for any fragment you enter ("33" will include both SH 33 and SMA-9833). Note that projects without a specific location might use "STATE", "LOCAL", or "OFFSYS" instead.

City: Search for any city associated with a project. It will try to find any fragment you enter ("falls" will include Twin Falls, Idaho Falls, and American Falls).

County: Search for a project's primary county. Pick from a drop-down list.

District: Search for a project's district. Pick from a drop-down list.

Segment: Contrary to the name, this searches for any *Route ID* associated with a project. It will try to find any fragment you enter. The difference between Segment and Route ID will be covered in the Project Locations section.

Major Program: Search by a broad measure of project funding type. For FAA funded use "Aeronautics"; for FTA funded use "Public Transportation". Highways projects are broken out into "Federal-Aid/State highway system", "Federal-Aid/Local road system", and "State Funded Program". Note that it is becoming increasingly common to combine Federal and State funds on the same project.

Work Class: Search by the project's work classification. Pick from a drop-down list.

Performance Program: Search for any of a project's programs (projects can have more than one), active or inactive. Pick from a drop-down list.

Eligible Source: Search for any funding source associated with a project, active or inactive. Pick from a drop-down list.

Project Properties: Search for any project property tag associated with a project. Pick from a drop-down list.

Record Count: Whether or not to cap you search results. Choose between 300 and Unlimited.

Once you enter your criteria and click “Search”, OTIS returns your results.

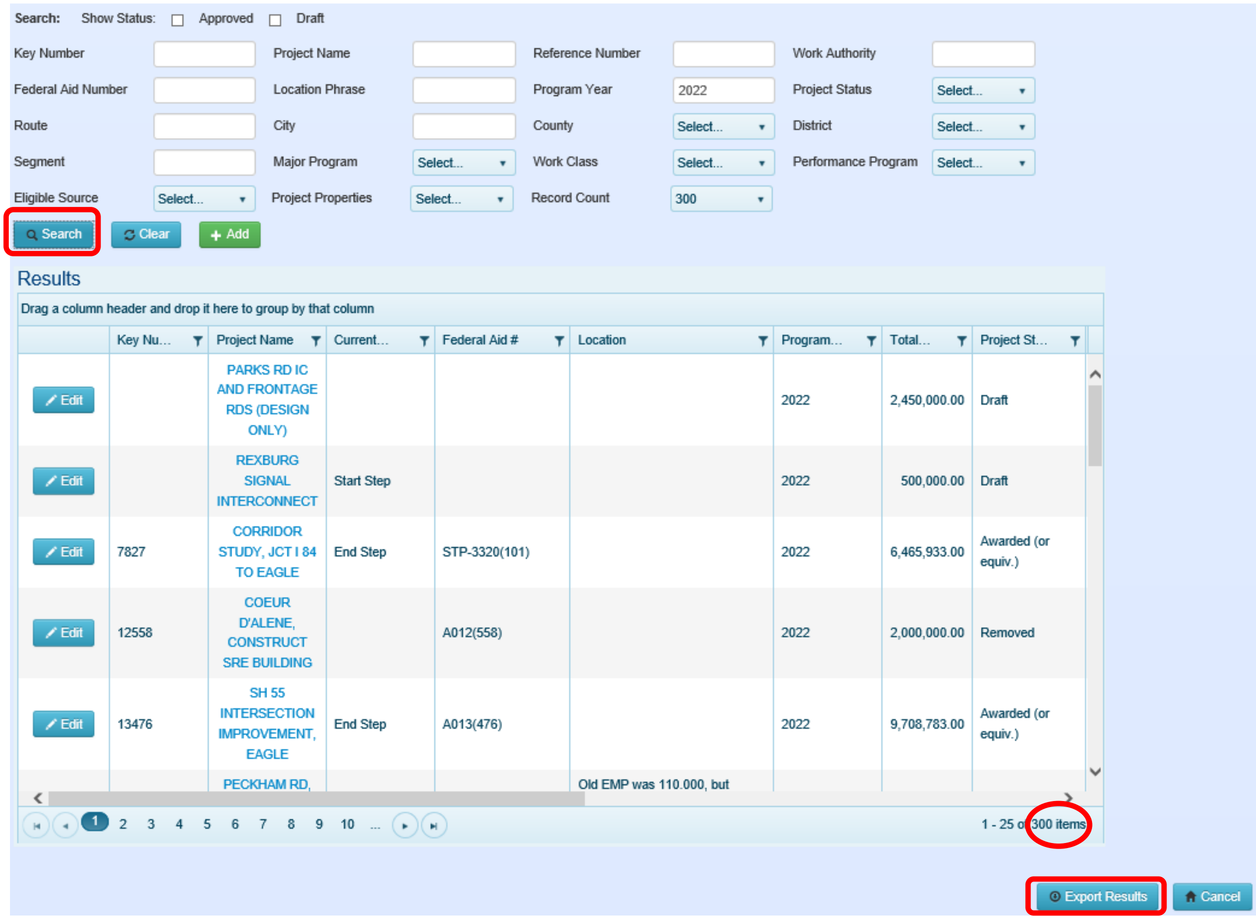


Figure 8 - the Advanced Search Results Screen

The number of result records is capped at 300 by default, so whenever you get exactly 300, beware! There are probably more matching records that aren’t being displayed. Either keep adding criteria until you have reduced the number of records below 300, or switch the Record Count criteria to “Unlimited” to see everything. On the other hand, if you have no results at all, make sure that your various criteria are not contradicting each other. For example, searching for “I 90” and “District 4” finds nothing because I 90 only passes through District 1. Click the “Clear” button to clear all criteria at once.

Once you find your project of interest, click the “Edit” button or the hyper-linked project name to go to the Edit Project screen.

If you would like to save your results for future reference or analysis, click the “Export Results” button to export them to a CSV file.

If you still have a large number of results, you may wish to filter and sort **within** those records. Thankfully the “Grid” containing the search results has a number of such features.

GRID FUNCTIONALITY

- To group the results, drag a **column header** to the top of the Grid (where it says "Drag a column header and drop it here…"). You may group by more than one column at a time.
- To sort the results, click a **Column** name to toggle between sorting from low to high and high to low.
- To filter the results, click the **Funnel** and choose from the advanced filtering capabilities.

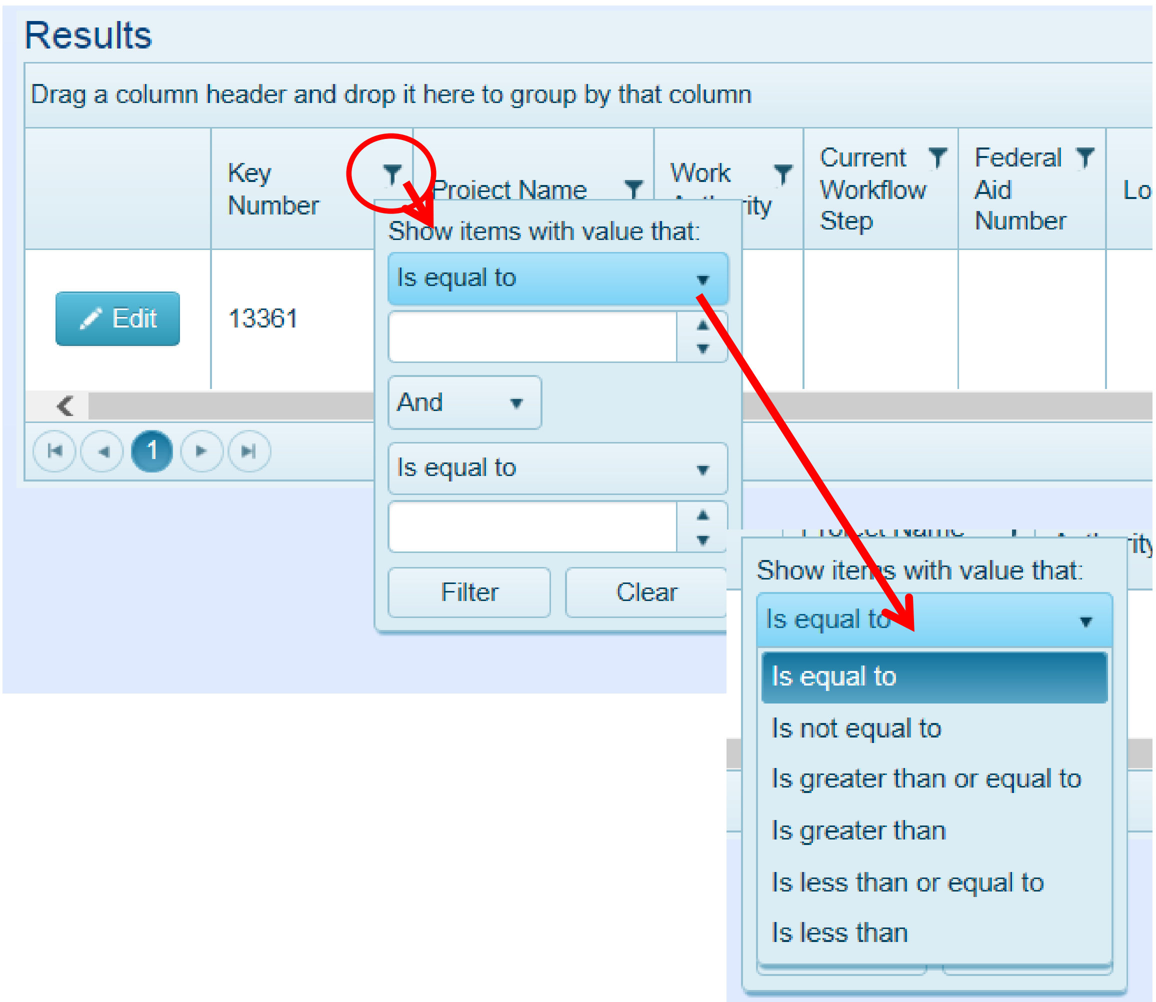


Figure 9 - Using Funnel Filters

PROJECT INFORMATION IN OTIS

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

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***, ***Locations***, ***Scope***, and ***Milestone & Tags***.

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

These are the eleven tab combinations containing project information:

- ***General / Project*** – summarizes the entire project record.
- ***General / Location*** – describes the physical location of the project with the option of mapping it.
- ***General / Scope*** – describes the intent of the project.
- ***General / Milestone & Tags*** – holds the OTIS, Environmental, PSS, Right of Way, and FHWA milestones, plus Project Properties.
- ***Budget / Summary*** – summarizes the project schedule, obligations, and expenditures at a high level.
- ***Budget / Program Details*** – displays detailed schedules and obligations by phase and year, along with the share percentages.
- ***Budget / History –*** records changes to scheduled costs by year, phase, and program.
- ***Work Authority*** – details the work authorities associated with a project.
- ***Obligation*** – summarizes obligations by year and phase, and by work authority and appropriation code; displays obligation issue details; and allows you to inititate new obligation issues.
- ***History*** – records the history of project changes by change requests and program updates.
- **Documents** – stores files associated with a project in electronic form.

GENERAL PROJECT INFORMATION

[Most of the following examples use Key Number 19727 to help demonstrate the project information screens.] The General Project screen provides a quick look at how the project is defined, when it is scheduled in the Program, and provides an overview of its Scheduled, Obligated, and Expended funds.

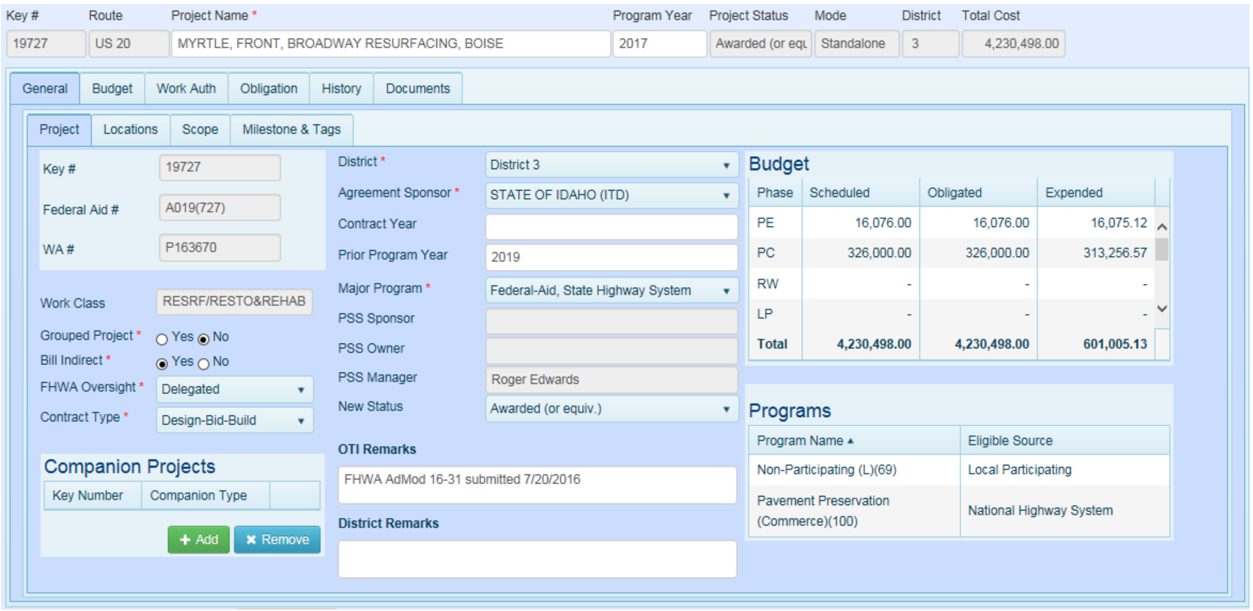


Figure 10 - General/Project Screen Showing Project Description, Status, Budget and Programs

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

1) What is the Work Authority?
2) Which Performance Programs are associated with this project ?
3) What is the total amount of Expended PE?
4) What is the total Scheduled Cost?

PROJECT LOCATIONS

Click on the ***Locations*** tab. The resulting screen is split into two sections: The leftmost is titled **Overall Project Location Characteristics** and provides calculated values for project length, number of lanes, and geographical distributions of the project across city, urban, county, and other boundaries.

The grid on the right titled **Project Location Summary** lists all the location records attached to the project. When there are multiple locations, the one with a "Primary" value of "true" is the one used in reports.

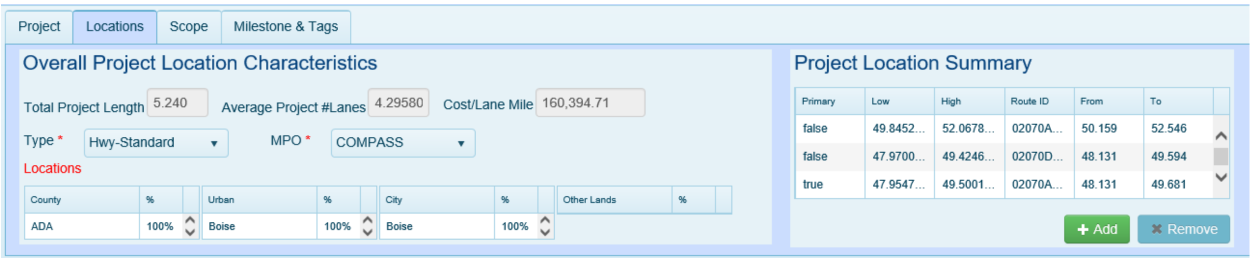
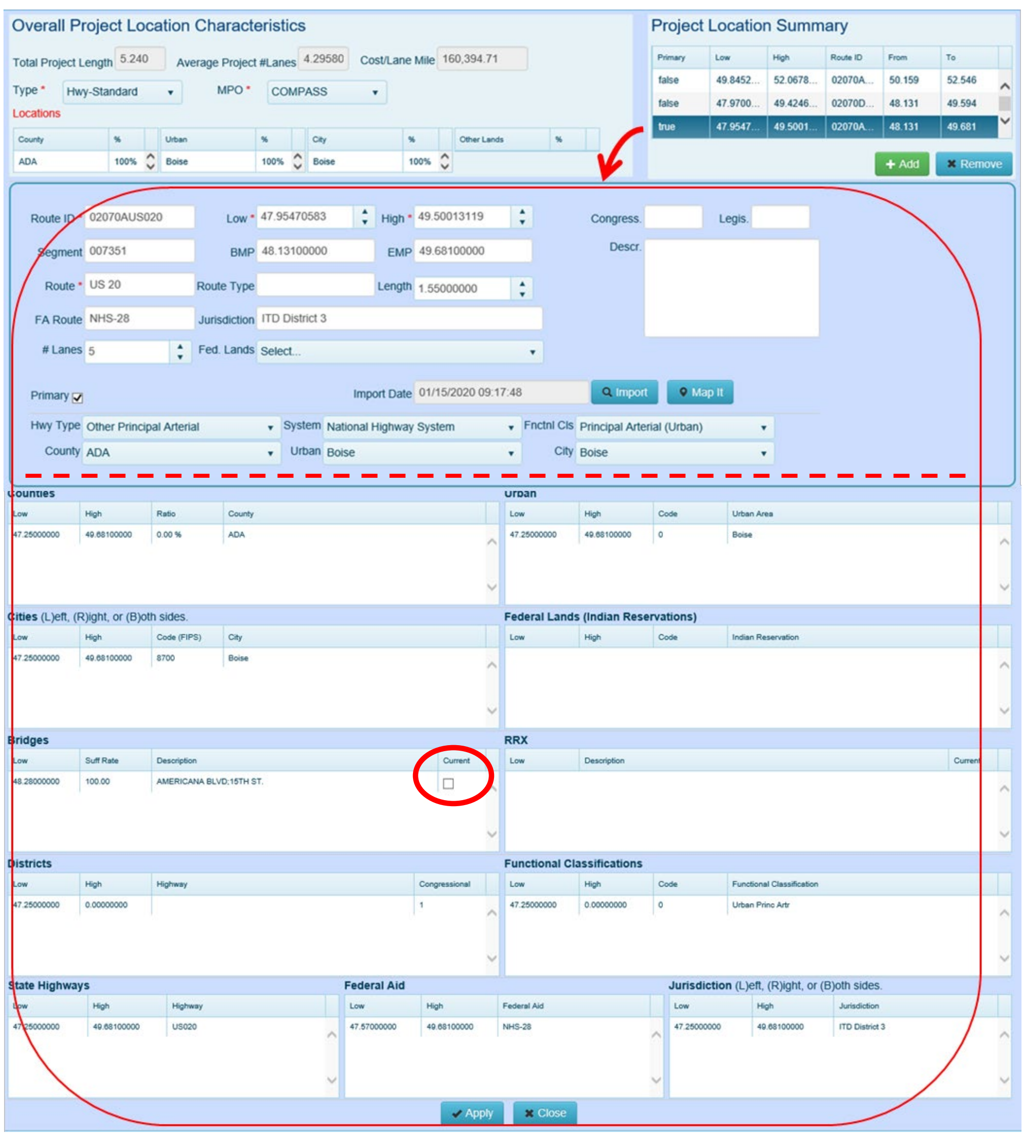


Figure 11 – Initial Project Location Screen

To see the actual details themselves, click on a specific location record in the **Project Location Summary** grid and the corresponding details will appear below in the previously hidden middle and bottom sections.



The middle section combines user-entered data with a summary of the details found in the bottom section. If a sub-category contains multiple values, the upper section picks the most "representative" one.

The bottom section contains the raw location details imported from ITD's linear referencing system.

If the project is addressing a bridge or railroad crossing, the box next to that feature should be checked. In this

Figure 12 - Project Location Details

particular example, the project is a resurfacing job, so it is NOT affecting the included bridge.

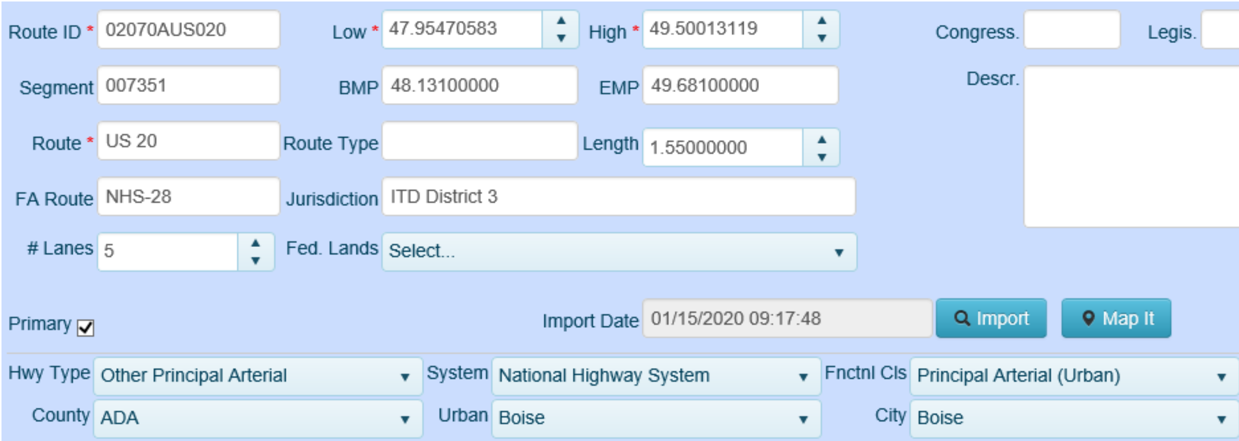


Figure 12 B - Location Detail Summary

Note that the upper half identifies the location using both the newer Route ID and Low & High Measures, and the older Segment and Beginning & Ending Milepoints. The new coordinates are used with mapping; The old coordinates help place the project relative to the existing roadway mileposts, which haven't yet been updated to the new Route IDs and Measures.

The **Import** button is only used when entering a new location or updating an existing one. To see the location on a map, click the **Map It** button, which launches the new *Route Info* web app. Click "OK" to continue. Depending on your browser, you may have to click through some certificate warnings as well.

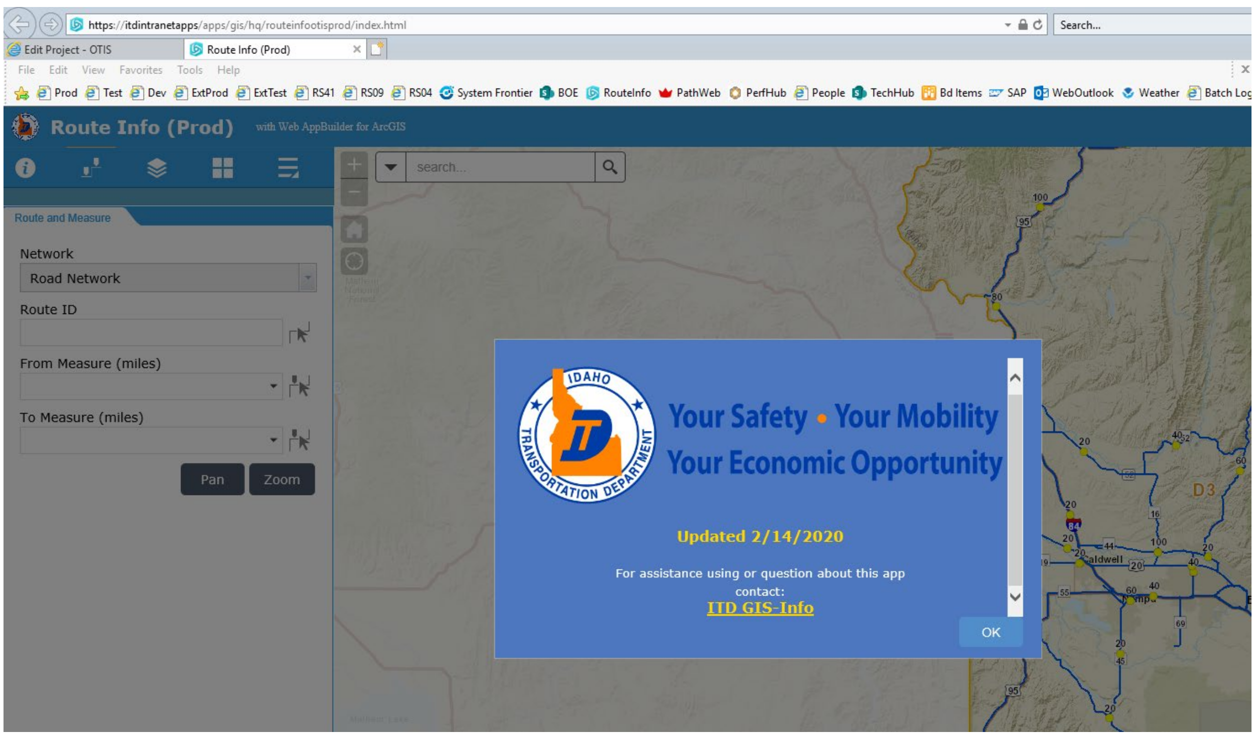


Figure 12 C – Route Info web app

As of this writing Route Info is not available outside of ITD's network. We hope to address this in the near future.

Unfortunately, OTIS and Route Info do not talk directly to each other, so you must transfer the location coordinates between them yourself. Copy the Route ID and Measures from OTIS and paste them into the matching fields on the left side of the Route Info screen:

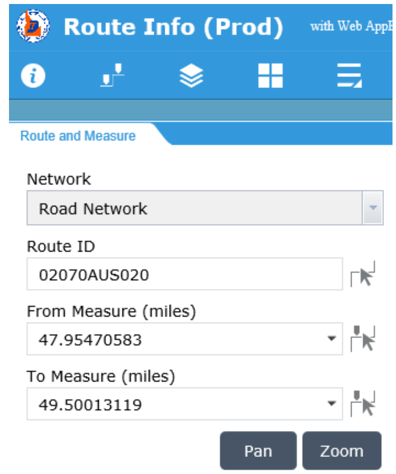


Figure 13-A – Route Info Location for KN 19727

The **Pan** button *centers* the map on the given location, but does *not* change the current map scale:

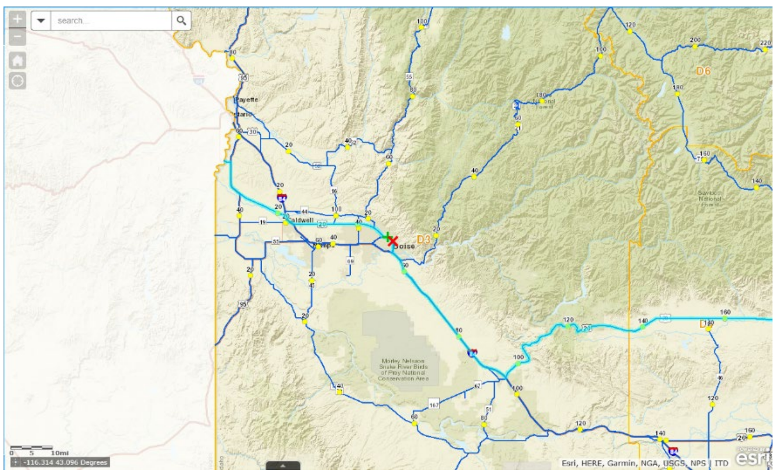


Figure 13-B – Pan View for KN 19727

The **Zoom** button *centers* the map *and* zooms in as closely as possible while still keeping the whole length visible. Note that a green "+" marks the beginning while a red "X" marks the ending:

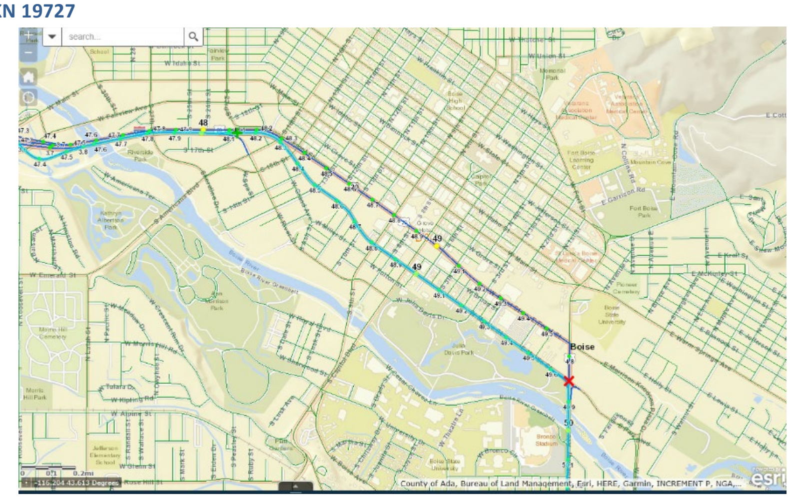


Figure 13-C – Zoom View for KN 19727

When done mapping, simply close the window or tab containing the Route Info app. You might want to save the address as a favorite so you can visit it without having to go through OTIS first.

Practice Exercise: Go to a project and see if you can find the following information from the ***General/Locations*** tab:

1) How many location records does it have?
2) Does it pass over any bridges or railroad crossings (RRX)? If so, does it address any of them?
3) Try the "Map It" button–Can you find the location using the Route Info app?

PROJECT SCOPE

Click on the ***Scope*** sub-tab to find out more about a project's intentions. In addition to the traditional Work Class and Sub Class categories, this screen also displays a Public Description written in non-technical terms.

Other fields are not quite as lay-friendly, like Budget Code and GASB Type.

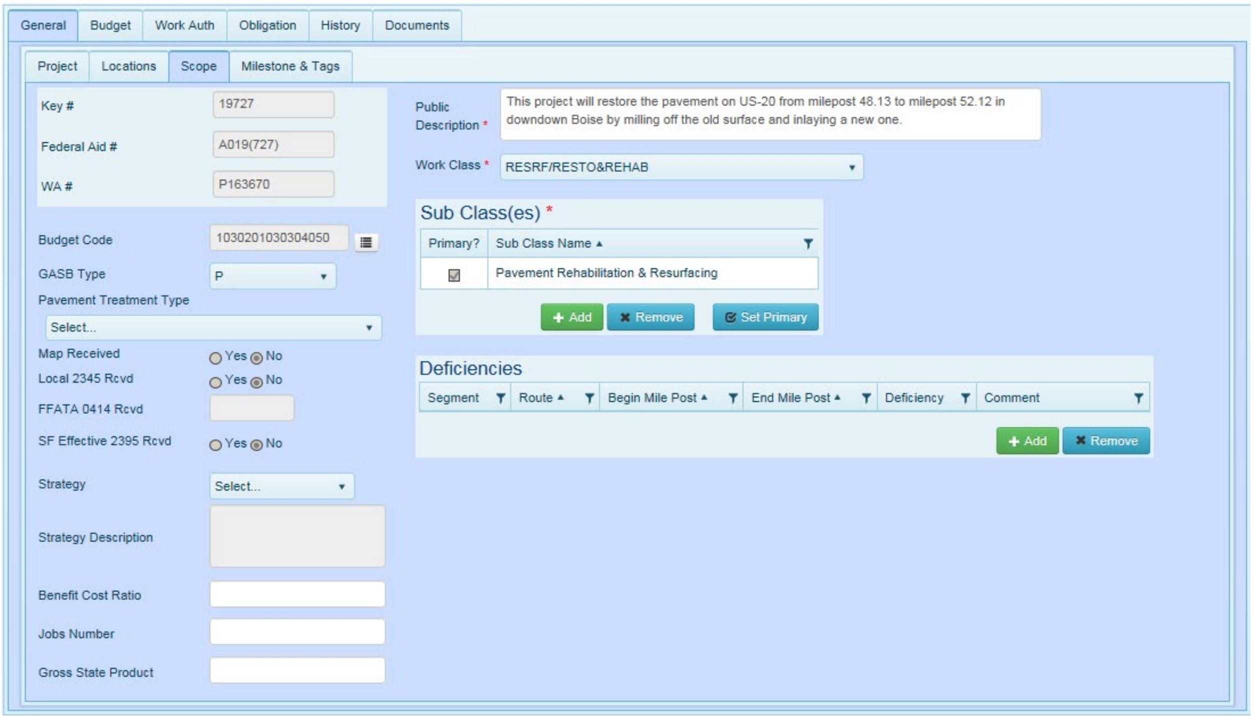


Figure 14 – Project Scope Screen

Practice Exercise: Go to a project and click the Scope tab:

1) Does the Public Description make any sense to you?
2) How many Subclasses does the project have?
3) Is the project addressing any recorded deficiencies?

PROJECT MILESTONES AND TAGS

Click on the Milestone & Tags tab to see the various milestones and properties associated with a project.

The OTIS Milestones are generated automatically within OTIS. The Environmental Milestones are entered by ITD's HQ Environmental section staff. The PSS Milestones are updated from the PSS system each night. The Right of Way Milestones are updated from the ROWDI system each night. The FHWA milestone is entered manually. Project Properties (aka Report Tags) are also entered manually.

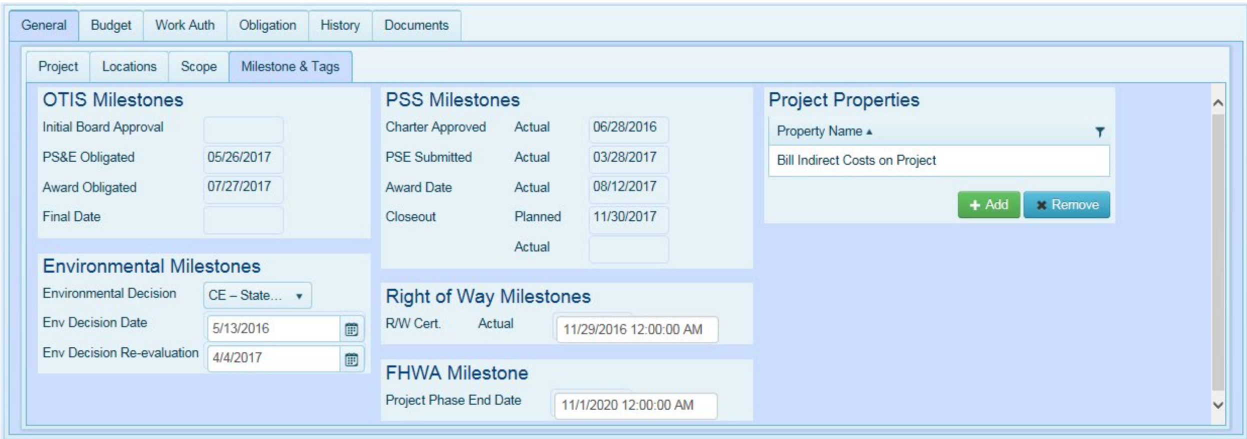


Figure 15 – Project Milestones Screen

BUDGET SUMMARY

Clicking on the ***Budget*** tab brings up the ***Budget/Summary*** screen, which focuses on a summary of the project's scheduled costs by year and phase, though it also includes a similar Scheduled, Obligated, and Expended grid as

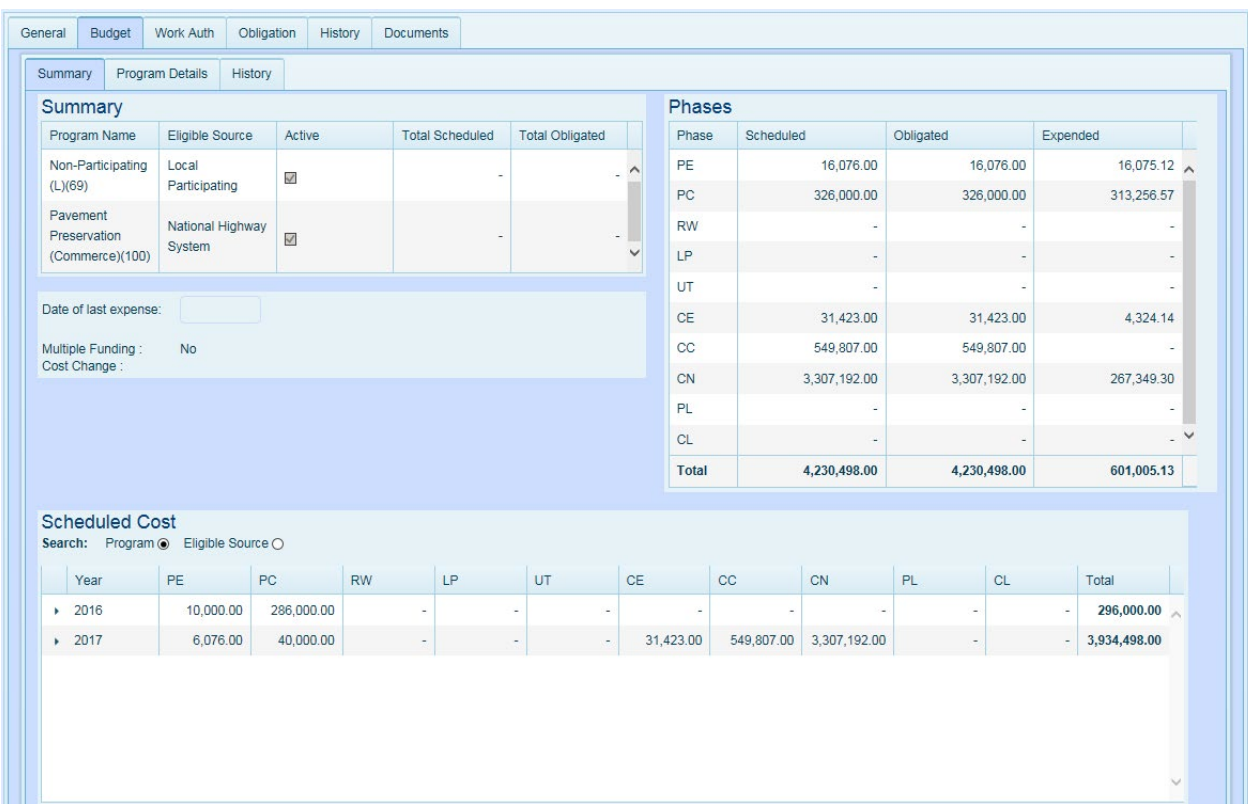


Figure 16 – Budget Summary Screen

found on the General/Project tab. The **Scheduled Cost** grid groups by Program by default, but has the option to group by Eligible Source as well.

BUDGET DETAILS

Clicking on the ***Budget/Program Details*** tab displays the Program Details list, the Shares list, and the Scheduled Cost and Obligation Summary grids for each selected program. There are two programs listed for Key Number 19727, Pavement Preservation and Non-Participating. Clicking on one program or the other in the Program Details list updates the rest of the screen with that program's information.

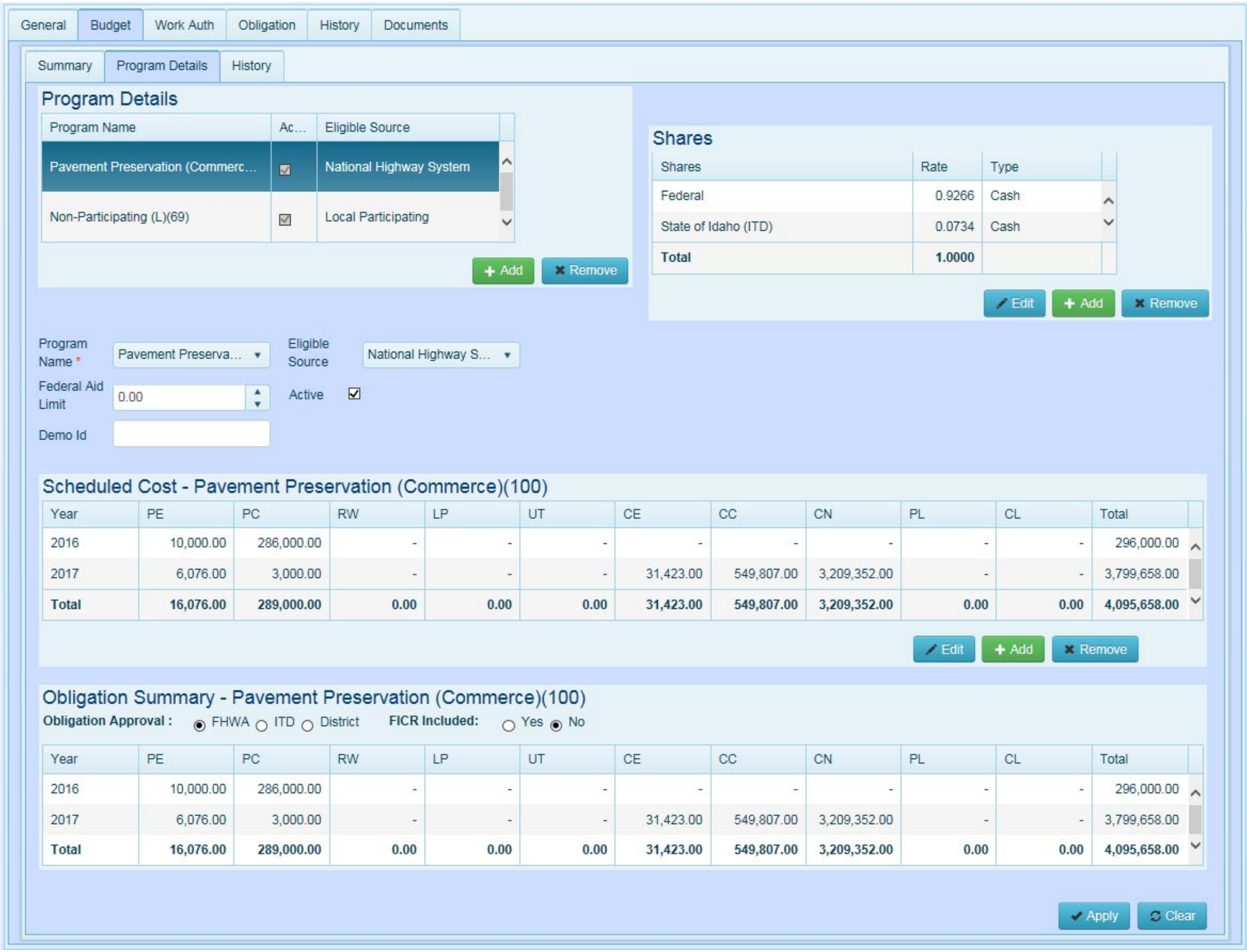


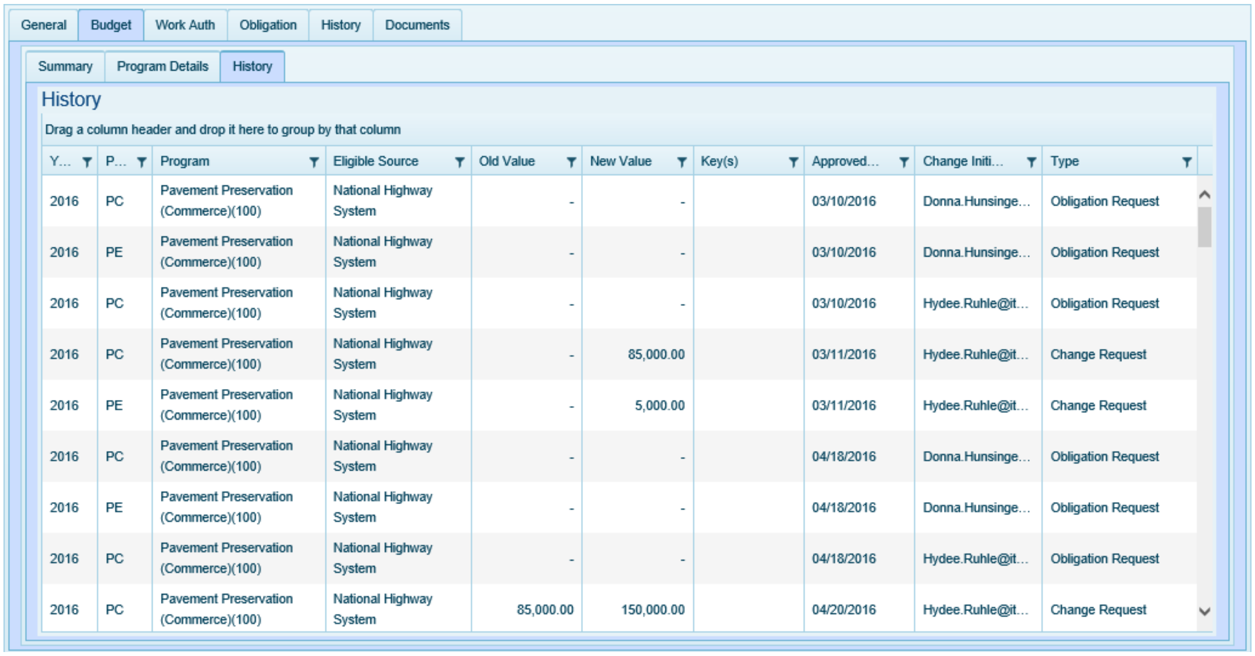
Figure 57 - Budget/Program Details screen displaying the Pavement Preservation portion of the project

Practice Exercise: Click the Budget / Program Details tab for your chosen project:

1) Are there multiple programs for this project? Are they all active?
2) What portion of the cost are the Feds paying for on that particular program? What organization is paying the rest?
3) Has the project begun obligating any of its scheduled costs?

BUDGET HISTORY

Clicking on the ***Budget/History*** tab reveals a record of budget changes by year, phase, and program, sorted by Date. This grid now includes the same sorting, filtering, and grouping features as the Advance Search screen.



Y...	P...	Program	Eligible Source	Old Value	New Value	Key(s)	Approved...	Change Initi...	Type
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	-	-		03/10/2016	Donna.Hunsinge...	Obligation Request
2016	PE	Pavement Preservation (Commerce)(100)	National Highway System	-	-		03/10/2016	Donna.Hunsinge...	Obligation Request
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	-	-		03/10/2016	Hydee.Ruhle@it...	Obligation Request
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	-	85,000.00		03/11/2016	Hydee.Ruhle@it...	Change Request
2016	PE	Pavement Preservation (Commerce)(100)	National Highway System	-	5,000.00		03/11/2016	Hydee.Ruhle@it...	Change Request
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	-	-		04/18/2016	Donna.Hunsinge...	Obligation Request
2016	PE	Pavement Preservation (Commerce)(100)	National Highway System	-	-		04/18/2016	Donna.Hunsinge...	Obligation Request
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	-	-		04/18/2016	Hydee.Ruhle@it...	Obligation Request
2016	PC	Pavement Preservation (Commerce)(100)	National Highway System	85,000.00	150,000.00		04/20/2016	Hydee.Ruhle@it...	Change Request

Figure 18 - Budget/History Screen

WORK AUTHORITY

Clicking on the ***Work Auth*** tab displays the Work Authorities grid with information on every work authority associated with the project. New work authorities are added from this screen as well. Note that an expiration date set in the future indicates that the Work Authority is still open.

Work Authority Number	Status	Date Established	Date Expired	Federal Aid Number	Comment		
P163670	OPEN	3/7/2016	11/1/2020	A019(727)	WA# ASSIGNED	Edit	Delete

Figure 19 - Work Authority Screen

Practice Exercise: Click the Work Auth tab for your chosen project:

1) Are there multiple work authorities for this project? Are they all open?
2) When was the work authority established?
3) Does it have an expiration date?

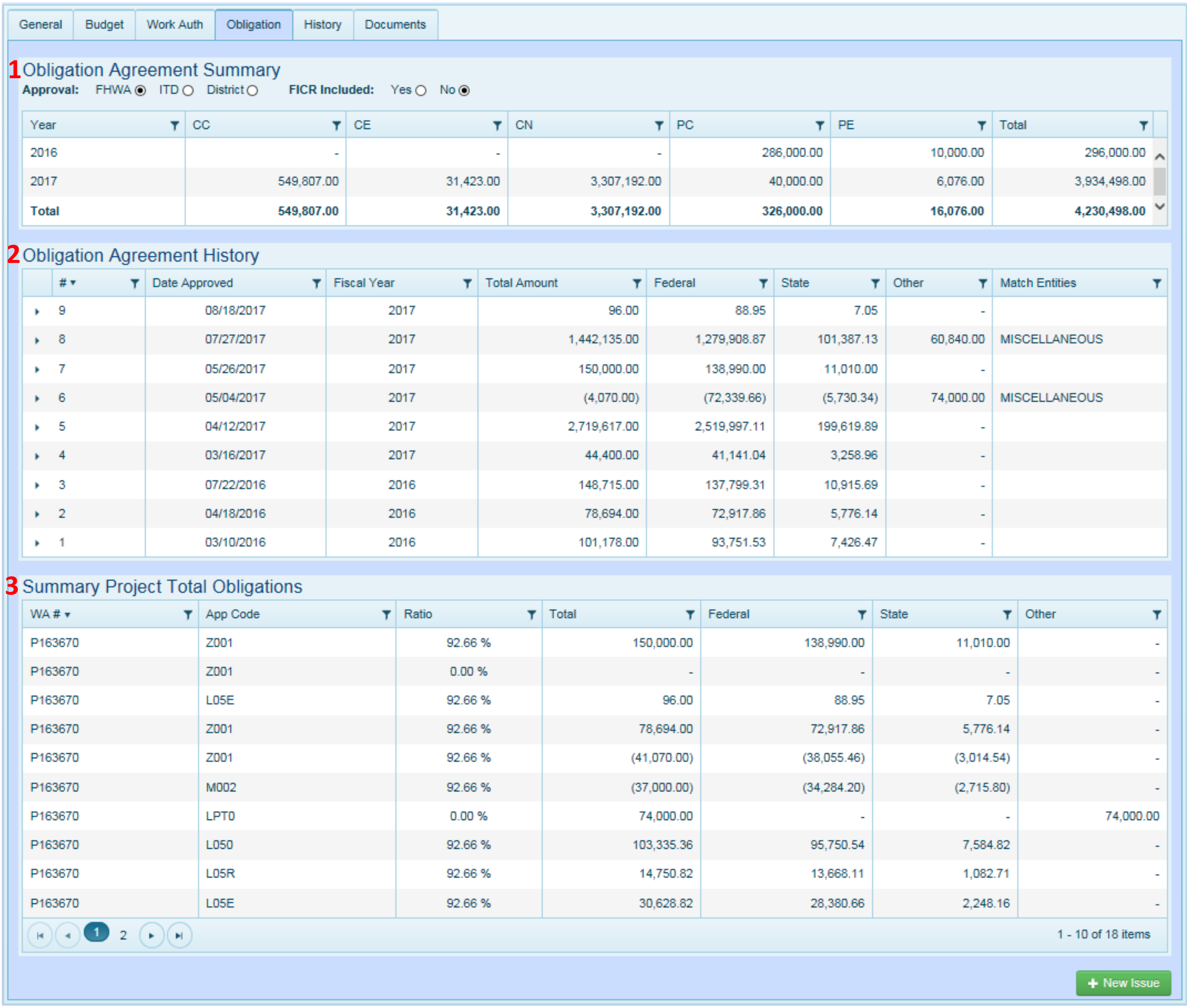
OBLIGATIONS

Clicking the Obligation tab displays the obligation history for a project. It is broken into three sections: The **Obligation Agreement Summary** grid (#1), which shows total obligations by year and phase; the **Obligation Agreement History** grid (#2), which records each obligation issue; and the **Summary Project Total Obligations** grid (#3), which summarizes obligations by work authority and appropriation code

To view the line item details for a specific obligation issue, click the arrowhead next to that issue number to reveal the **Line Items** grid. For more details on a specific Line Item, click the arrowhead next to it and the **Obligation Item Details** section appears.

To view the remarks and workflow history for an obligation issue, click the bar titled **Obligation Request Details**.

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



Year	CC	CE	CN	PC	PE	Total
2016	-	-	-	286,000.00	10,000.00	296,000.00
2017	549,807.00	31,423.00	3,307,192.00	40,000.00	6,076.00	3,934,498.00
Total	**549,807.00**	**31,423.00**	**3,307,192.00**	**326,000.00**	**16,076.00**	**4,230,498.00**

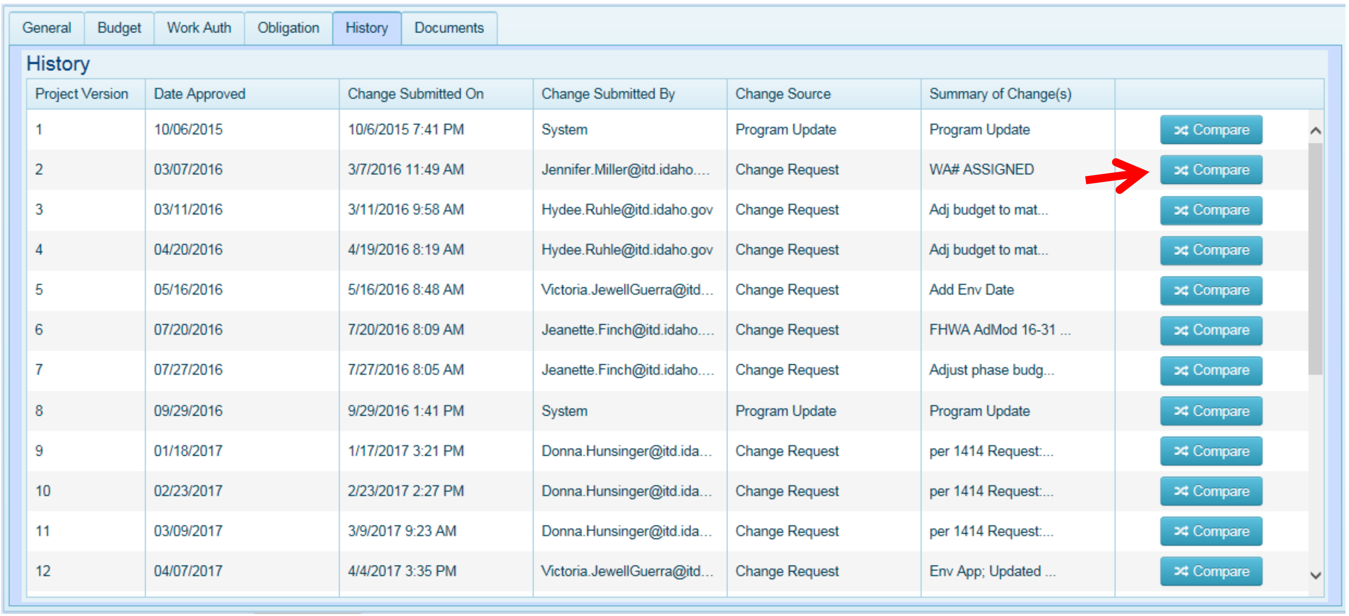
#	Date Approved	Fiscal Year	Total Amount	Federal	State	Other	Match Entities
9	08/18/2017	2017	96.00	88.95	7.05	-	
8	07/27/2017	2017	1,442,135.00	1,279,908.87	101,387.13	60,840.00	MISCELLANEOUS
7	05/26/2017	2017	150,000.00	138,990.00	11,010.00	-	
6	05/04/2017	2017	(4,070.00)	(72,339.66)	(5,730.34)	74,000.00	MISCELLANEOUS
5	04/12/2017	2017	2,719,617.00	2,519,997.11	199,619.89	-	
4	03/16/2017	2017	44,400.00	41,141.04	3,258.96	-	
3	07/22/2016	2016	148,715.00	137,799.31	10,915.69	-	
2	04/18/2016	2016	78,694.00	72,917.86	5,776.14	-	
1	03/10/2016	2016	101,178.00	93,751.53	7,426.47	-	

WA #	App Code	Ratio	Total	Federal	State	Other
P163670	Z001	92.66 %	150,000.00	138,990.00	11,010.00	-
P163670	Z001	0.00 %	-	-	-	-
P163670	L05E	92.66 %	96.00	88.95	7.05	-
P163670	Z001	92.66 %	78,694.00	72,917.86	5,776.14	-
P163670	Z001	92.66 %	(41,070.00)	(38,055.46)	(3,014.54)	-
P163670	M002	92.66 %	(37,000.00)	(34,284.20)	(2,715.80)	-
P163670	LPT0	0.00 %	74,000.00	-	-	74,000.00
P163670	L050	92.66 %	103,335.36	95,750.54	7,584.82	-
P163670	L05R	92.66 %	14,750.82	13,668.11	1,082.71	-
P163670	L05E	92.66 %	30,628.82	28,380.66	2,248.16	-

Figure 20 – Obligation Screen

PROJECT HISTORY

Clicking on the **History** tab displays the project's History grid, which records all project changes over time. Unlike most OTIS grids it cannot be sorted, filtered, or grouped.



Project Version	Date Approved	Change Submitted On	Change Submitted By	Change Source	Summary of Change(s)	
1	10/06/2015	10/6/2015 7:41 PM	System	Program Update	Program Update	Compare
2	03/07/2016	3/7/2016 11:49 AM	Jennifer.Miller@itd.idaho....	Change Request	WA# ASSIGNED	Compare
3	03/11/2016	3/11/2016 9:58 AM	Hydee.Ruhle@itd.idaho.gov	Change Request	Adj budget to mat...	Compare
4	04/20/2016	4/19/2016 8:19 AM	Hydee.Ruhle@itd.idaho.gov	Change Request	Adj budget to mat...	Compare
5	05/16/2016	5/16/2016 8:48 AM	Victoria.JewellGuerra@itd...	Change Request	Add Env Date	Compare
6	07/20/2016	7/20/2016 8:09 AM	Jeanette.Finch@itd.idaho....	Change Request	FHWA AdMod 16-31 ...	Compare
7	07/27/2016	7/27/2016 8:05 AM	Jeanette.Finch@itd.idaho....	Change Request	Adjust phase budg...	Compare
8	09/29/2016	9/29/2016 1:41 PM	System	Program Update	Program Update	Compare
9	01/18/2017	1/17/2017 3:21 PM	Donna.Hunsinger@itd.ida...	Change Request	per 1414 Request:...	Compare
10	02/23/2017	2/23/2017 2:27 PM	Donna.Hunsinger@itd.ida...	Change Request	per 1414 Request:...	Compare
11	03/09/2017	3/9/2017 9:23 AM	Donna.Hunsinger@itd.ida...	Change Request	per 1414 Request:...	Compare
12	04/07/2017	4/4/2017 3:35 PM	Victoria.JewellGuerra@itd...	Change Request	Env App; Updated ...	Compare

Figure 21 – Project History Screen

Clicking on the **Compare** button opens a new window with a summary of that record's changes. Changes are broken up into four categories, with the number of changed fields in parentheses. In the case of the 3/7/2016 record, only the General Information category was affected. Clicking on it expands that category to reveal that the specific changes included…

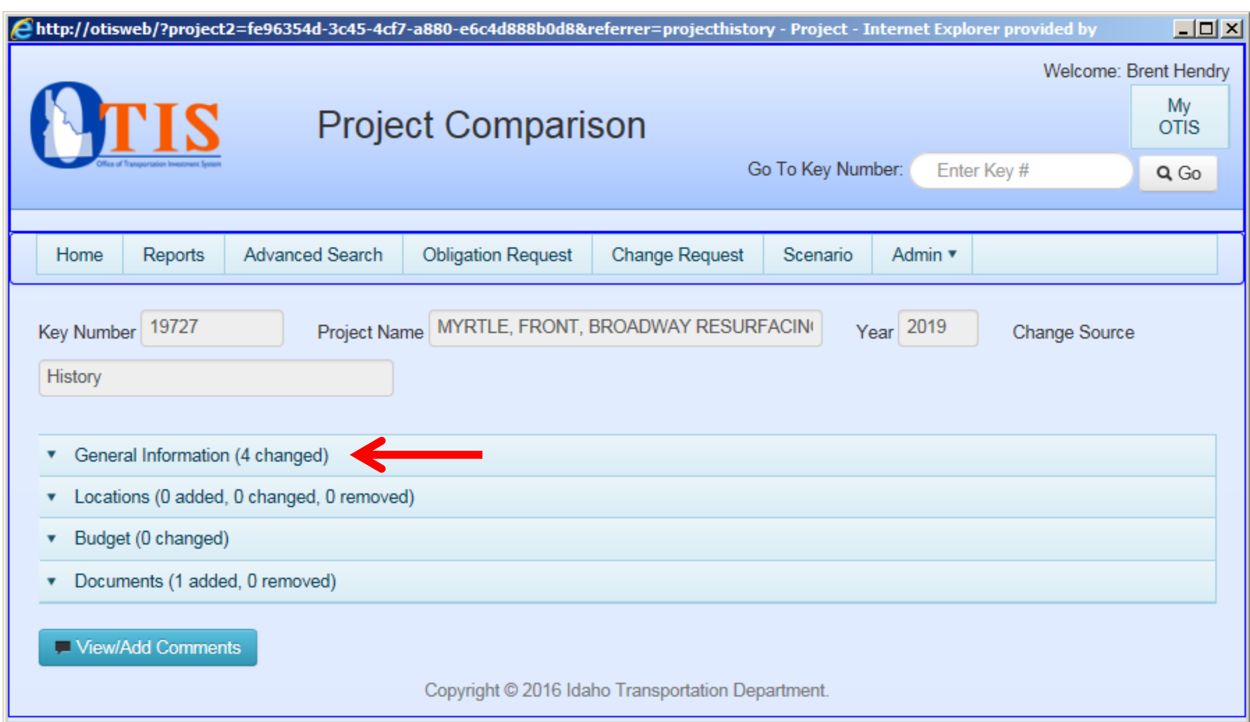


Figure 22 – Project Comparison popup window

…A new Work Authority!

▲ General Information (4 changed)

Property Name	Old Value	New Value	Changed On	Changed By
MYRTLE, FRONT, BROADWAY RESURFACING, BOISE (19727) -> -> Number	UNASSIGNED	P163670	03/07/2016	Jeanette.Finch@itd.idaho.gov
MYRTLE, FRONT, BROADWAY RESURFACING, BOISE (19727) -> -> Established	10/6/2015 12:00:00 AM	3/7/2016 12:00:00 AM	03/07/2016	Jeanette.Finch@itd.idaho.gov
MYRTLE, FRONT, BROADWAY RESURFACING, BOISE (19727) -> -> Expired		4/30/2021 12:00:00 AM	03/07/2016	Jeanette.Finch@itd.idaho.gov
MYRTLE, FRONT, BROADWAY RESURFACING, BOISE (19727) -> -> Comment		WA# ASSIGNED	03/07/2016	Jeanette.Finch@itd.idaho.gov

▼ Locations (0 added, 0 changed, 0 removed)

▼ Budget (0 changed)

▼ Documents (1 added, 0 removed)

Figure 23 – Portion of Project Comparison popup window with General Information category expanded

Practice Exercise: Click the History tab for your chosen project (if it doesn't have any records, try some different key numbers until you find one that does):

1) Pick a record and click the Compare button. How many categories have changes?
2) Open some of the categories with changes. What sort of fields were changed?
3) Did the change record's "Summary of Change(s)" description adequately describe the recorded changes?

PROJECT DOCUMENTS

Clicking on the ***Documents*** tab displays a grid showing all the files currently attached to the project.

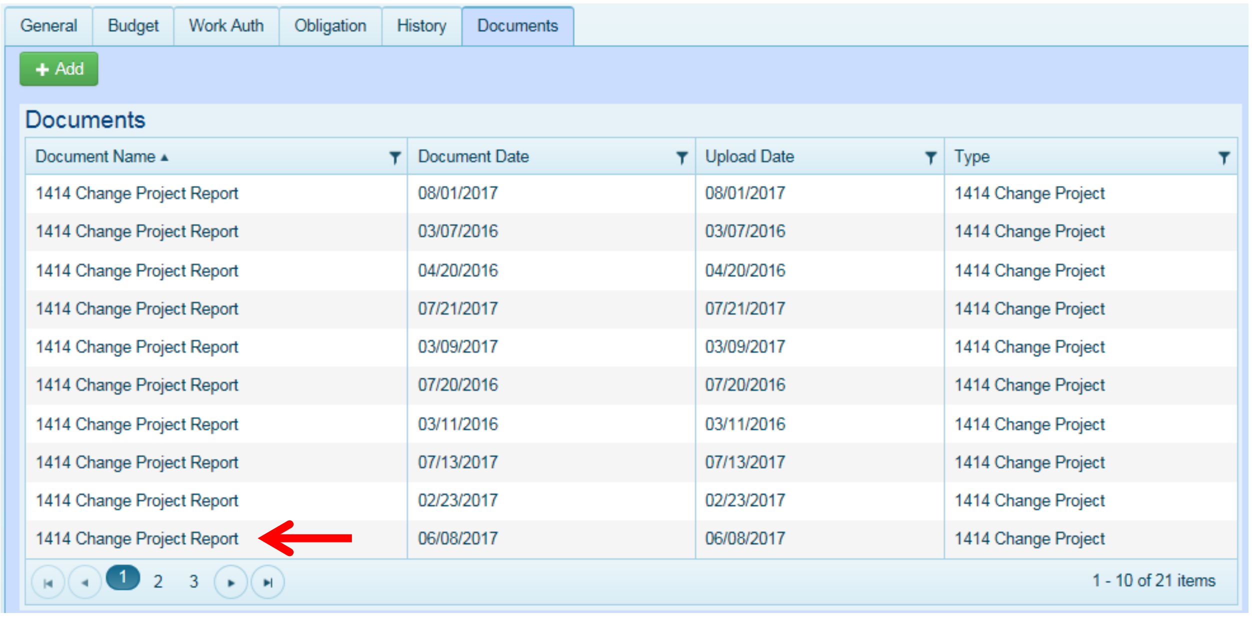


Figure 24 - Document Screen

To view a file, click on its record and the Document Details sub-grid appears. Click the **View Doc** button to open the file. OTIS can accept nearly any kind of file type, as long as it is 4 MB or less in size.

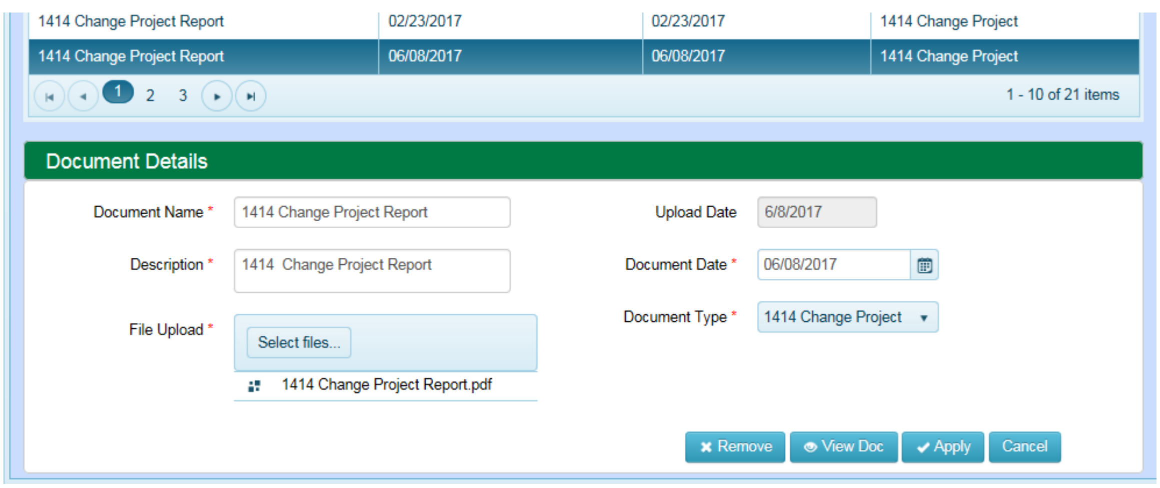


Figure 25 - Document Details Screen

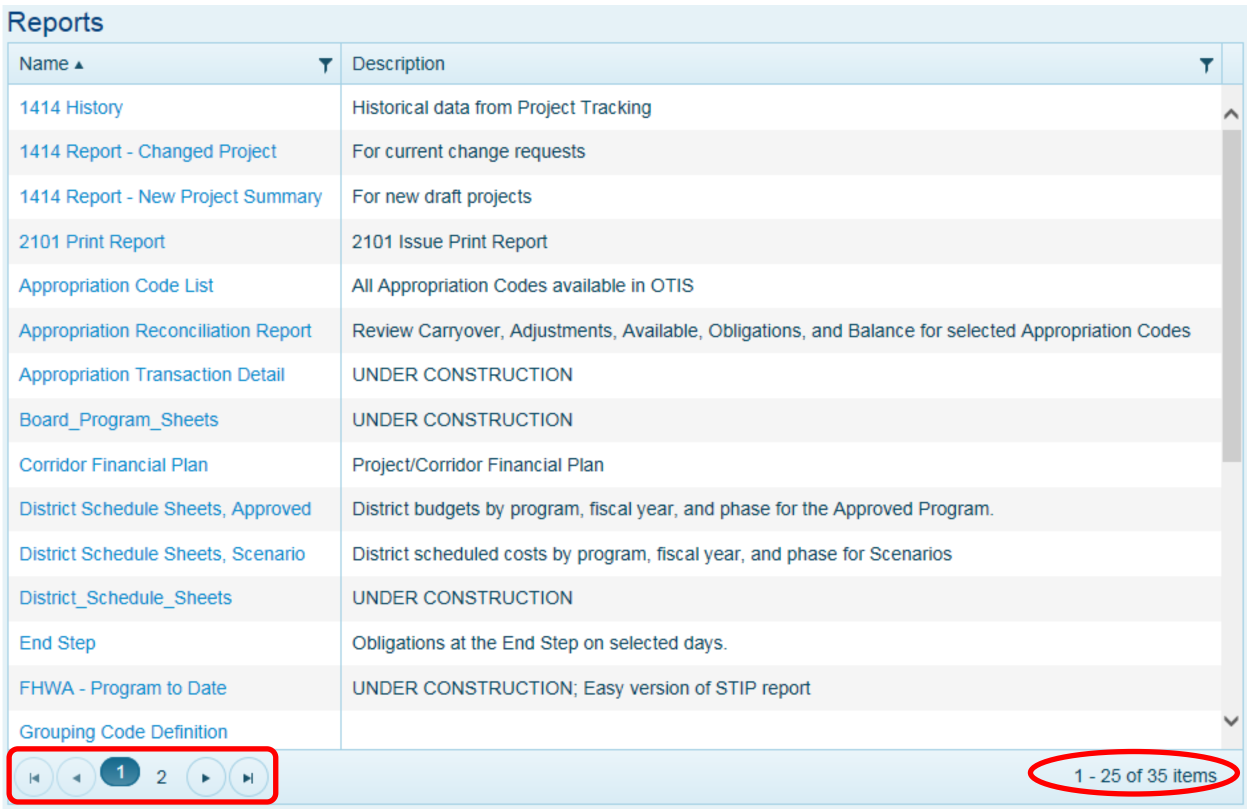
Practice Exercise: Click the Documents tab for your chosen project (if it doesn't have any records, try some different key numbers until you find one that does):

1) How many items are attached to your project?
2) What is the earliest Upload Date? How about the latest?
3) Try viewing a couple of the attached documents.

OTIS REPORTS

Click on the “Reports” menu to jump to the ***Reports*** section of OTIS.

As of this writing, there are over 30 reports available or under construction (see the count at the lower right). You may need to use the slider bar along the right side to see all the reports on a page. Navigate to other pages by using the controls in the lower left corner. The Reports grid always shows the Name and Description columns, though some users may see a few administrative columns as well.


Reports

Name ▲	Description
1414 History	Historical data from Project Tracking
1414 Report - Changed Project	For current change requests
1414 Report - New Project Summary	For new draft projects
2101 Print Report	2101 Issue Print Report
Appropriation Code List	All Appropriation Codes available in OTIS
Appropriation Reconciliation Report	Review Carryover, Adjustments, Available, Obligations, and Balance for selected Appropriation Codes
Appropriation Transaction Detail	UNDER CONSTRUCTION
Board_Program_Sheets	UNDER CONSTRUCTION
Corridor Financial Plan	Project/Corridor Financial Plan
District Schedule Sheets, Approved	District budgets by program, fiscal year, and phase for the Approved Program.
District Schedule Sheets, Scenario	District scheduled costs by program, fiscal year, and phase for Scenarios
District_Schedule_Sheets	UNDER CONSTRUCTION
End Step	Obligations at the End Step on selected days.
FHWA - Program to Date	UNDER CONSTRUCTION; Easy version of STIP report
Grouping Code Definition	

1 2 1 - 25 of 35 items

Figure 26 - First Page of OTIS Reports List

For an example, click on the name “2101 Print Report”. This brings up the report’s criteria screen.

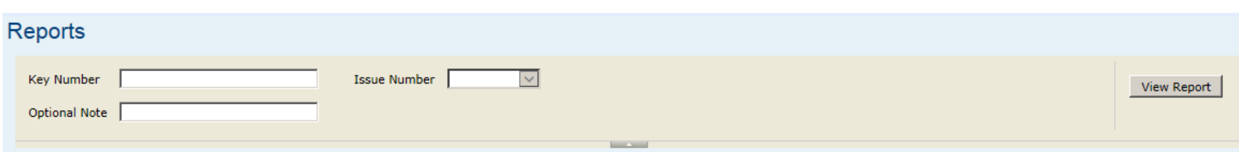


Figure 27 - Report Criteria Screen for 2101 Print Report

This report requires the following values:

- Key Number, and
- Obligation Issue Number.

Note that entering the Key Number and typing “Tab” or “Enter” causes the Issue Number field to fill in. If you wanted a different Issue Number from the default, simply click on it and select the correct one from the resulting list.

The “Optional Note” field is not required. If you choose to enter something, it will appear in the upper right corner of the report.

After filling in the criteria, click the “View Report” button.

In the example below, we set ***Key Number*** to"1004", ***Issue Number*** to "5", and ***Optional Note*** "File".

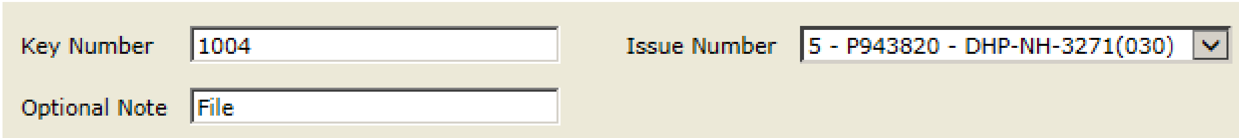


Figure 28 – Setting the 2101 Print Report Selection Criteria

Once the criteria are set, click "View Report" to generate the report, and it will fill up the rest of the screen below the criteria section. If you do not see a small "Loading" screen appear, OTIS probably didn't recognize your click—Try clicking "View Report" again. If you see the Loading screen but no report appears, *and* you are using Chrome or a Chrome-based browser like Edge, the report is probably there but invisible! Either switch back to Internet Explorer, or take the additional step of exporting the report in order to see it.

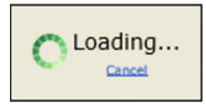
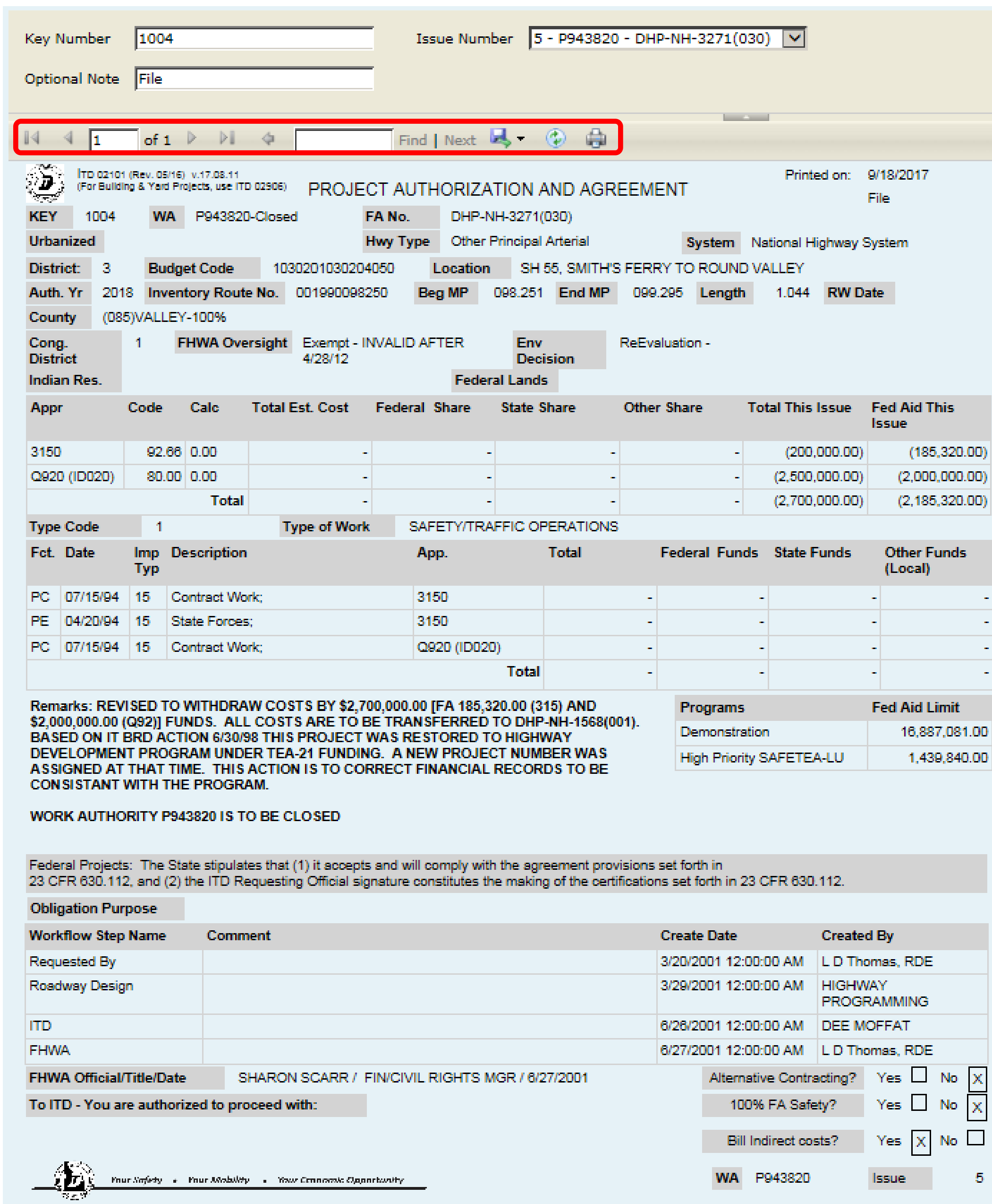


Figure 28A – The Report Loading Screen



ITD 02101 (Rev. 05/16) v.17.08.11
(For Building & Yard Projects, use ITD 02506)

PROJECT AUTHORIZATION AND AGREEMENT

Printed on: 9/18/2017
File

KEY	1004	WA	P943820-Closed	FA No.	DHP-NH-3271(030)				
Urbanized		Hwy Type	Other Principal Arterial	System	National Highway System				
District:	3	Budget Code	1030201030204050	Location	SH 55, SMITH'S FERRY TO ROUND VALLEY				
Auth. Yr	2018	Inventory Route No.	001990098250	Beg MP	098.251	End MP	099.295	Length	1.044
RW Date									
County	(085)VALLEY-100%								
Cong. District	1	FHWA Oversight	Exempt - INVALID AFTER 4/28/12	Env Decision	ReEvaluation -				
Indian Res.		Federal Lands							

Appr	Code	Calc	Total Est. Cost	Federal Share	State Share	Other Share	Total This Issue	Fed Aid This Issue
3150	92.66	0.00	-	-	-	-	(200,000.00)	(185,320.00)
Q920 (ID020)	80.00	0.00	-	-	-	-	(2,500,000.00)	(2,000,000.00)
		Total	-	-	-	-	(2,700,000.00)	(2,185,320.00)

Type Code 1 Type of Work SAFETY/TRAFFIC OPERATIONS

Fct.	Date	Imp Typ	Description	App.	Total	Federal Funds	State Funds	Other Funds (Local)
PC	07/15/94	15	Contract Work;	3150	-	-	-	-
PE	04/20/94	15	State Forces;	3150	-	-	-	-
PC	07/15/94	15	Contract Work;	Q920 (ID020)	-	-	-	-
				Total	-	-	-	-

Remarks: REVISED TO WITHDRAW COSTS BY $2,700,000.00 [FA 185,320.00 (315) AND $2,000,000.00 (Q92)] FUNDS. ALL COSTS ARE TO BE TRANSFERRED TO DHP-NH-1568(001). BASED ON IT BRD ACTION 6/30/98 THIS PROJECT WAS RESTORED TO HIGHWAY DEVELOPMENT PROGRAM UNDER TEA-21 FUNDING. A NEW PROJECT NUMBER WAS ASSIGNED AT THAT TIME. THIS ACTION IS TO CORRECT FINANCIAL RECORDS TO BE CONSISTANT WITH THE PROGRAM.

WORK AUTHORITY P943820 IS TO BE CLOSED

Programs	Fed Aid Limit
Demonstration	16,887,081.00
High Priority SAFETEA-LU	1,439,840.00

Federal Projects: The State stipulates that (1) it accepts and will comply with the agreement provisions set forth in 23 CFR 630.112, and (2) the ITD Requesting Official signature constitutes the making of the certifications set forth in 23 CFR 630.112.

Obligation Purpose

Workflow Step Name	Comment	Create Date	Created By
Requested By		3/20/2001 12:00:00 AM	L D Thomas, RDE
Roadway Design		3/29/2001 12:00:00 AM	HIGHWAY PROGRAMMING
ITD		6/26/2001 12:00:00 AM	DEE MOFFAT
FHWA		6/27/2001 12:00:00 AM	L D Thomas, RDE

FHWA Official/Title/Date SHARON SCARR / FIN/CIVIL RIGHTS MGR / 6/27/2001

To ITD - You are authorized to proceed with:

	Yes	No
Alternative Contracting?	☐	X
100% FA Safety?	☐	X
Bill Indirect costs?	X	☐

Your Safety • Your Mobility • Your Economic Opportunity

WA P943820 Issue 5

Figure 29 - 2101 Print Report Output

Note the thin navigation bar between the report criteria section and the report itself. Use the leftmost section to navigate between pages of your report (#1). Use the blank box and “Find | Next” buttons (#2) to search within the report. Click the blue floppy disk icon (#3) to save the report in one of several formats (your best bets are PDF for later printing or viewing and CSV for exporting the raw data). Ignore the circular “Refresh” button (#4). Click the printer icon (#5) to print the report.

IMPORTANT: The printer icon requires a certain piece of supporting software to be installed on your computer. If the printer icon does not work for you, save the report as a PDF first, then print that instead.

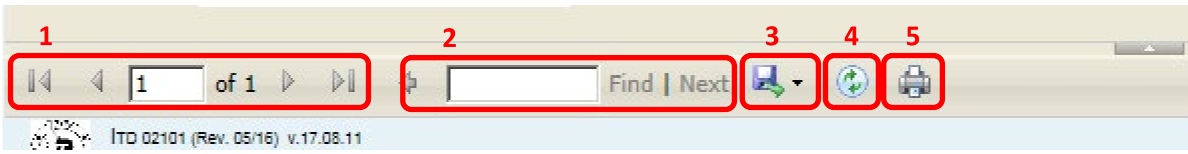


Figure 30 – Report Navigation Bar

As you become more experienced with OTIS reports, you may wish to add the ones you use most frequently to your OTIS ***Home*** screen**.** To do so, click on “MyOTIS” and check the reports you wish to include. Then click ***Update Profile.*** Your checked reports should appear in the Home screen’s **Reports** section.

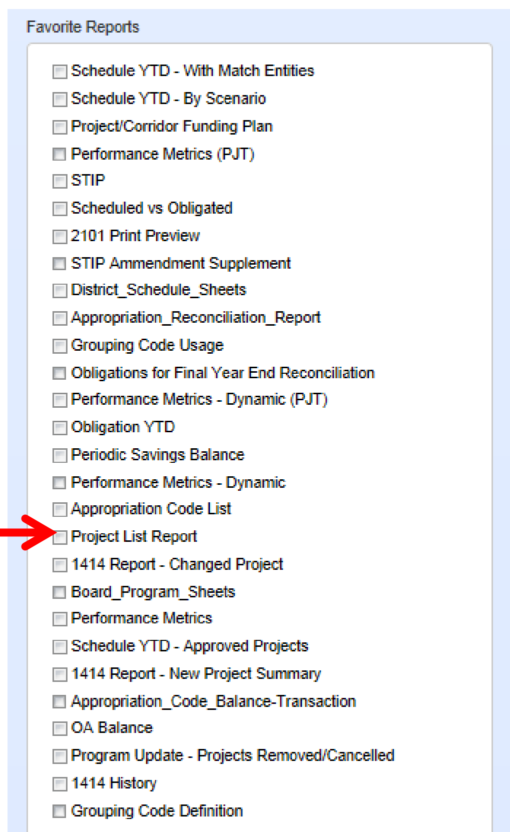


Figure 31 - Favorite Report Selection List from My OTIS

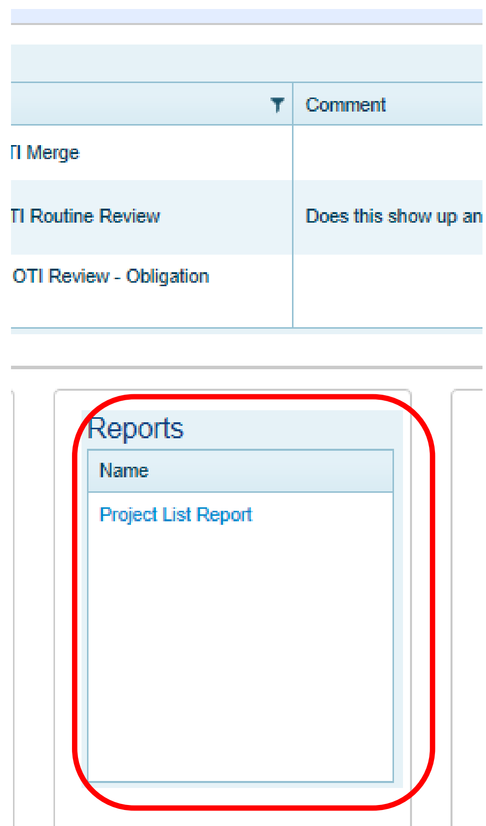


Figure 32 - Project List Report on the Home Reports list

WRAPPING UP

PRACTICE AND QUESTIONS

At this point in the training, it is important to spend some time practicing. Be sure you are familiar with 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 "My OTIS" environment

This is also a great time to ask more specific questions about the areas you will be using the most.

OTIS TROUBLESHOOTING

OTIS is highly dependent on multiple ITD servers and the network connections between those servers and your computer. Problems with these servers and/or network can slow OTIS down or even prevent it from working at all.

If OTIS is preventing you from completing your work, please contact the OTIS administrators immediately. For users outside of ITD's network, please email or call Brent Hendry (Brent.hendry@itd.idaho.gov, 208-334-8261) or Colleen Wonacott (Colleen.Wonacott@itd.idaho.gov). For users on ITD's network, use the same contact information above, or send an email to ITD-OTIS@itd.idaho.gov.

Be sure to let the administrators know which web browser you are using, and whether or not you can access other web pages. If you are getting an error message, or are seeing something strange, take a screenshot and email it to the administrators. Some common error messages look like this:

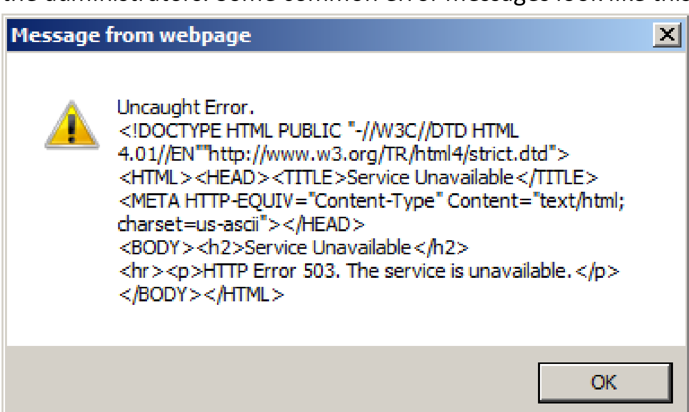


Figure 33 – 503 Service Unavailable (Probably due to OTIS maintenance)

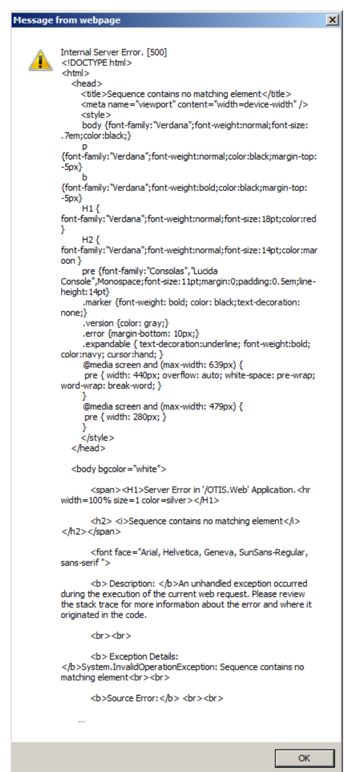
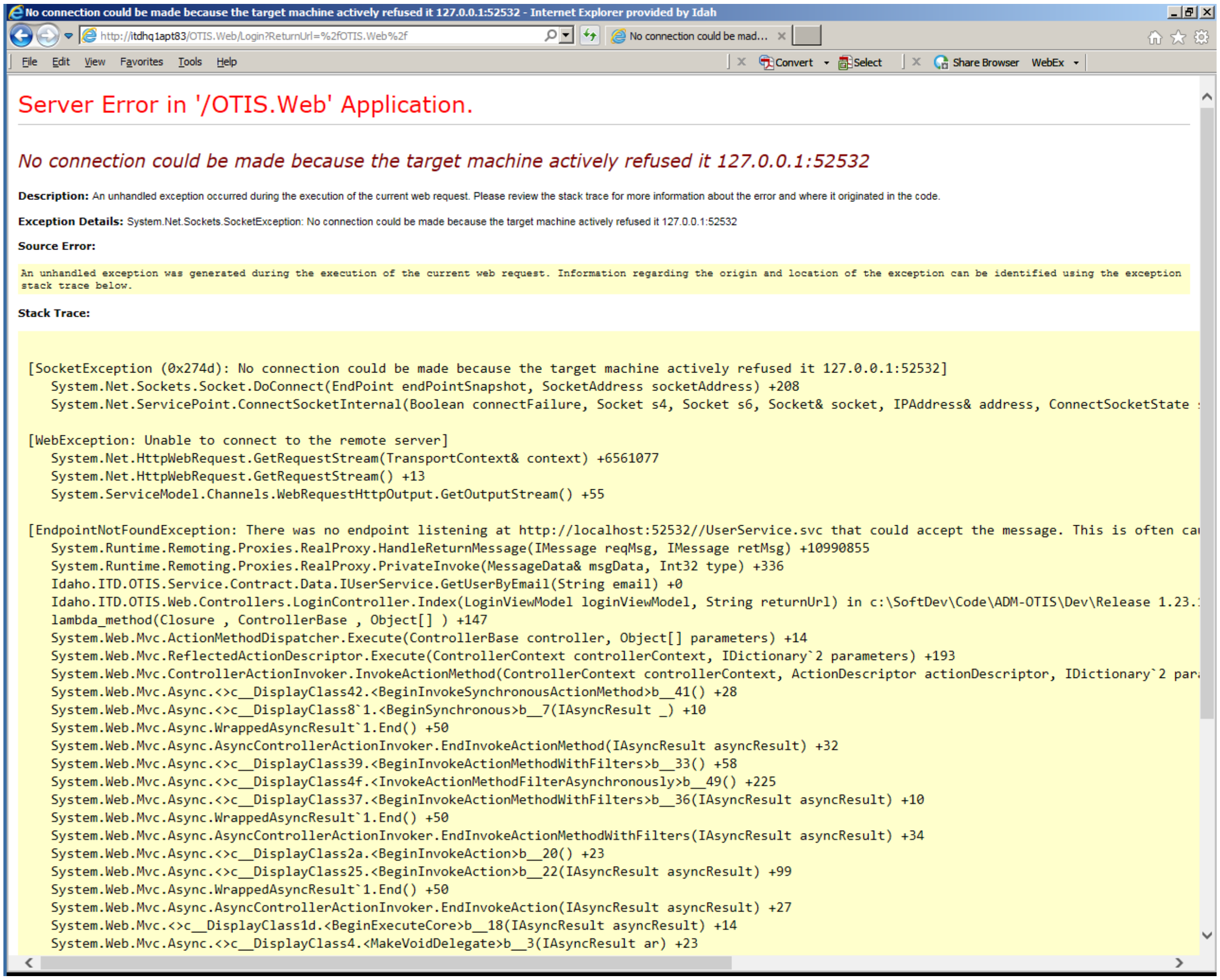


Figure 34 – Internal Server Error (AKA, the White Screen)


No connection could be made because the target machine actively refused it 127.0.0.1:52532 - Internet Explorer provided by Idah

http://itdhq1apt83/OTIS.Web/Login?ReturnUrl=%2fOTIS.Web%2f

No connection could be mad...

File Edit View Favorites Tools Help

Convert Select Share Browser WebEx

Server Error in '/OTIS.Web' Application.

No connection could be made because the target machine actively refused it 127.0.0.1:52532

Description: An unhandled exception occurred during the execution of the current web request. Please review the stack trace for more information about the error and where it originated in the code.

Exception Details: System.Net.Sockets.SocketException: No connection could be made because the target machine actively refused it 127.0.0.1:52532

Source Error:

```
An unhandled exception was generated during the execution of the current web request. Information regarding the origin and location of the exception can be identified using the exception
stack trace below.
```

Stack Trace:

```
[SocketException (0x274d): No connection could be made because the target machine actively refused it 127.0.0.1:52532]
   System.Net.Sockets.Socket.DoConnect(EndPoint endPointSnapshot, SocketAddress socketAddress) +208
   System.Net.ServicePoint.ConnectSocketInternal(Boolean connectFailure, Socket s4, Socket s6, Socket& socket, IPAddress& address, ConnectSocketState :

[WebException: Unable to connect to the remote server]
   System.Net.HttpWebRequest.GetRequestStream(TransportContext& context) +6561077
   System.Net.HttpWebRequest.GetRequestStream() +13
   System.ServiceModel.Channels.WebRequestHttpOutput.GetOutputStream() +55

[EndpointNotFoundException: There was no endpoint listening at http://localhost:52532//UserService.svc that could accept the message. This is often ca
   System.Runtime.Remoting.Proxies.RealProxy.HandleReturnMessage(IMessage reqMsg, IMessage retMsg) +10990855
   System.Runtime.Remoting.Proxies.RealProxy.PrivateInvoke(MessageData& msgData, Int32 type) +336
   Idaho.ITD.OTIS.Service.Contract.Data.IUserService.GetUserByEmail(String email) +0
   Idaho.ITD.OTIS.Web.Controllers.LoginController.Index(LoginViewModel loginViewModel, String returnUrl) in c:\SoftDev\Code\ADM-OTIS\Dev\Release 1.23.:
   lambda_method(Closure , ControllerBase , Object[] ) +147
   System.Web.Mvc.ActionMethodDispatcher.Execute(ControllerBase controller, Object[] parameters) +14
   System.Web.Mvc.ReflectedActionDescriptor.Execute(ControllerContext controllerContext, IDictionary`2 parameters) +193
   System.Web.Mvc.ControllerActionInvoker.InvokeActionMethod(ControllerContext controllerContext, ActionDescriptor actionDescriptor, IDictionary`2 par:
   System.Web.Mvc.Async.<>c__DisplayClass42.<BeginInvokeSynchronousActionMethod>b__41() +28
   System.Web.Mvc.Async.<>c__DisplayClass8`1.<BeginSynchronous>b__7(IAsyncResult _) +10
   System.Web.Mvc.Async.WrappedAsyncResult`1.End() +50
   System.Web.Mvc.Async.AsyncControllerActionInvoker.EndInvokeActionMethod(IAsyncResult asyncResult) +32
   System.Web.Mvc.Async.<>c__DisplayClass39.<BeginInvokeActionMethodWithFilters>b__33() +58
   System.Web.Mvc.Async.<>c__DisplayClass4f.<InvokeActionMethodFilterAsynchronously>b__49() +225
   System.Web.Mvc.Async.<>c__DisplayClass37.<BeginInvokeActionMethodWithFilters>b__36(IAsyncResult asyncResult) +10
   System.Web.Mvc.Async.WrappedAsyncResult`1.End() +50
   System.Web.Mvc.Async.AsyncControllerActionInvoker.EndInvokeActionMethodWithFilters(IAsyncResult asyncResult) +34
   System.Web.Mvc.Async.<>c__DisplayClass2a.<BeginInvokeAction>b__20() +23
   System.Web.Mvc.Async.<>c__DisplayClass25.<BeginInvokeAction>b__22(IAsyncResult asyncResult) +99
   System.Web.Mvc.Async.WrappedAsyncResult`1.End() +50
   System.Web.Mvc.Async.AsyncControllerActionInvoker.EndInvokeAction(IAsyncResult asyncResult) +27
   System.Web.Mvc.<>c__DisplayClass1d.<BeginExecuteCore>b__18(IAsyncResult asyncResult) +14
   System.Web.Mvc.Async.<>c__DisplayClass4.<MakeVoidDelegate>b__3(IAsyncResult ar) +23
```

Figure 35 –Server Error (AKA, the Yellow Screen)

However, the most likely problem users will experience is slow response time. In some cases this is unavoidable—some of the more complicated reports are pushing a lot of data around, so they might take a minute or two to complete. On the other hand, opening a new tab or screen should never take more than a minute. Submitting a change request or an obligation request should never take more than an hour to reappear on their respective lists. If you encounter such delays there may be a problem with one of the OTIS servers, so please let the administrators know.

Document Change Control

Version Number	Date of Issue	Author(s)	Brief Description of Change
2.00	9/27/2019	BH	Location section updated to reflect ITD's new Linear Referencing System; Document Change Control section added
2.03	1/5/2021	BH	Clean up typos and oversights.
2.11	1/26/2022	BH	Update external address; Clarify text; Add "OTIS TRICKS AHEAD" sections; Add password error figures; Add report "Loading" figure.
2.12	2/22/2022	BH	Clean up OTIS TRICKS AHEAD graphic.
2.13	6/1/2022	BH	Fix spelling error.
2.14	2/1/2023	BH	Fix figure references.