Optic Administrator Guide

Introduction

As the Administrator, you are responsible for managing the content of announcements and events, the projects that are included in the database, and the users and organizations that are members of your online community. Since the website is publicly available, protocols and tools have been put in place to allow you to manage these items.

You will have the following responsibilities:

- Approve and manage announcements and events;
- Approve submitted projects for inclusion in the database;
- Manage and approve user and organization authorization; and
- Create and save advanced reports.

This guide is organized according to the following Modules:

- Home
- Projects
- Accounts
- Reports

The following will describe the key features associated with your responsibilities with respect to the module in which the responsibility will take place. For a more detailed description of system functionalities and usage, please see the Optic User Guide.

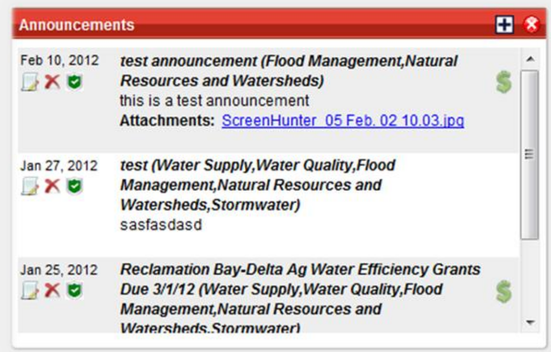
Module: Home (Top)

The Home Page allows public users to create and submit new announcements and events. Once submitted, these announcements and events will need to be approved by the Administrator before they are published to the site. Upon submission of an announcement or event, the Administrator will receive an email notification alerting them that a new announcement or event has been submitted. Additionally, the Administrator may create and post announcements and events. Events and announcements will not be available to be viewed by the public until they have been approved by the Administrator.

To manage the announcements and events, there are four (4) icons:

- Edit icon ( )
- Delete icon ( )
- Not Approved icon ( ) – the announcement or event has been created, but is not approved (published) and is not visible to the public

- Approved icon ( ) – the announcement or event has been approved (published) and is visible to the public



To get started, click on the Home button on the left hand panel.

Feature: Add a new Announcement or Event

- Click on the add icon ( ) in the upper right hand corner of the Dashboard. A dialog window will open.
- Enter required information and upload attachments if available. Click on the Save button. ***Please note that you will still need to approve the announcement or event (see below).***

Feature: Approve a new Announcement or Event

- Click on the Not Approved icon ( ) below the Announcement or Event that you would like to approve. You will receive a confirmation dialog box. The icon will turn to green (Approved).

Feature: Disapprove an Announcement or Event

- Click on the Approved icon ( ) below the Announcement or Event that you would like to disapprove. You will receive a confirmation dialog box. The icon will turn to yellow (Not Approved).

Feature: Edit an Announcement or Event

- Click on the Edit icon ( ) below the Announcement or Event that you would like to edit. A dialog box will open containing the details of the announcement or event.
- Make any edits and click the Save button. Note: You may also approve or disapprove an announcement or event from this dialog box by checking or unchecking the Published checkbox.

Feature: Delete an Announcement or Event

- Click on the Delete icon ( ) below the Announcement or Event that you would like to delete. You will receive a confirmation dialog box.
- Click the Delete button. The item will be removed.

Module: Projects (Top)

Public users will create and submit projects in the Projects Module. The Administrator will receive an email notification when a new project has been submitted for inclusion in the system. Projects will need to be allowed for submission by the Administrator prior to being published to the site. Public users will not be able to view other projects unless those projects are allowed and published by the Administrator. The Administrator may also select the projects that have been approved into the Integrated Regional Water Management Plan (IRWMP).

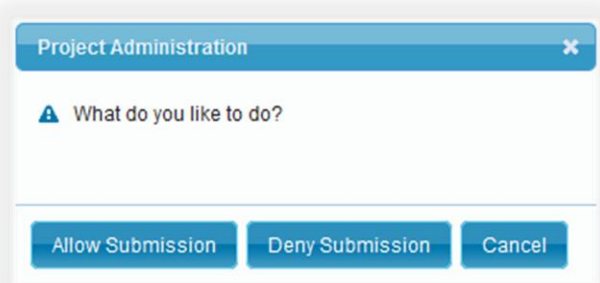
To get started, click on the Projects button on the left hand panel. Click on the List View icon ( ) in the upper left hand corner.

To manage projects, there are two (2) icons under the Status column:

- Not Allowed icon ( ) – the project has been submitted, but is not allowed for submission and is not visible to the public
- Submission Allowed icon ( ) – the project has been allowed for submission and is visible to the public

Feature: Allow submission for a project

- Click on the Not Allowed icon ( ) next to the project that you would like to approve. A dialog window will open.
- To allow the project for submission into the system, click on the Allow Submission button. The icon will turn to green (Submission Allowed).



Feature: Disapprove an allowed project

- Click on the Submission Allowed icon ( ) next to the project that you would like to disapprove. A dialog window will open.
- Click on the Deny Submission button. The project will disappear from the Administrator's view. The project proponent is able to resubmit the project.

Feature: Approve or disapprove a project for inclusion in the IRWMP

- To approve a project, check the checkbox in the IRWMP Approved column of the project list.
- To disapprove a project, uncheck the checkbox in the IRWMP Approved column of the project list.

Module: Accounts (Top)

The purpose of this module is to manage user and organization information as well as the user's authorization to submit projects.

In order for a user to become a Community Member and authorized to submit projects, they must submit a request to the Administrator. The request is done via the interface within the My Profile module of the system by clicking on a link to "Become a Community Member". The Administrator must approve or deny their authorization request. The Administrator will receive an email notification when a user has submitted a request to become a community member.

To get started, click on the Accounts button on the left hand panel.

To manage users, there are three (3) icons:

- Not Authorized icon ( ) – the user has not requested authorization from the Administrator or the Administrator has removed their authorization
- Request Pending icon ( ) – the user has requested authorization but the Administrator has not yet approved authorization
- Authorized icon ( ) – the user has been approved by the Administrator
- Edit icon ( )
- Delete icon ( )

Feature: Authorize a user

- Click on the Request Pending icon ( ) next to the user that you would like to authorize. A dialog box will open containing the contact information for the user.
- Select the "Yes" radio button under the text "Authorize this user".
- Click the Save button. The dialog box will close and the Request Pending icon will turn to green (Authorized).

Feature: Remove authorization for a user

- Click on the Authorized icon ( ) next to the user for which you would like to remove authorization. A dialog box will open containing the contact information for the user.
- Select the "No" radio button under the text "Authorize this user".
- Click the Save button. The dialog box will close and the Authorized icon will turn to white (Not Authorized).

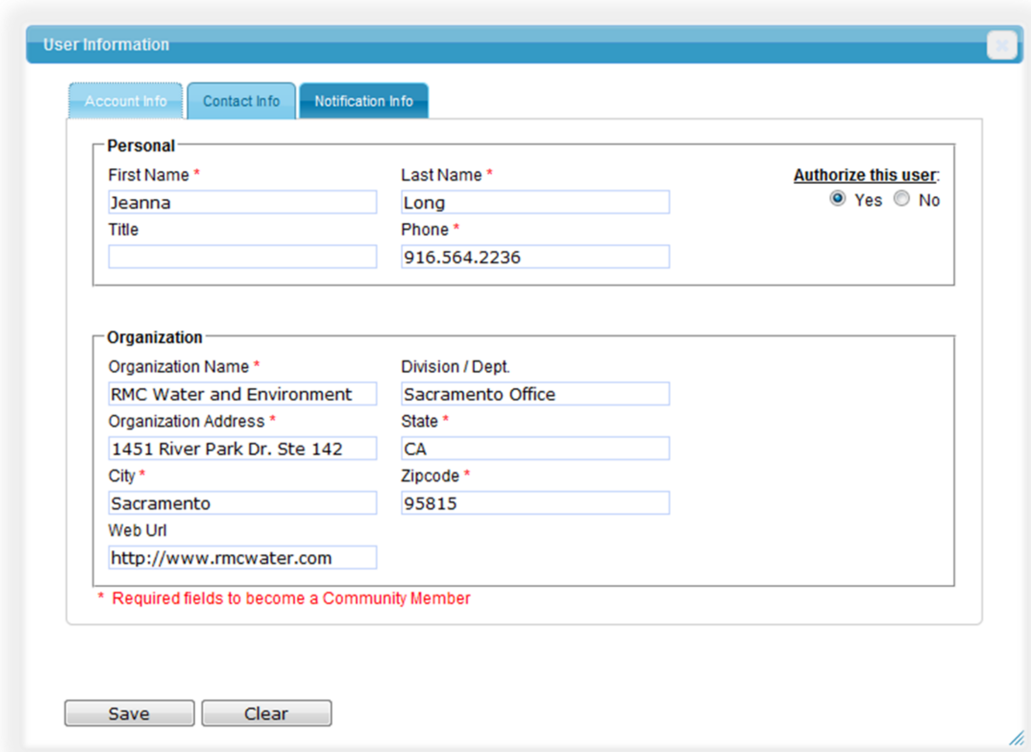
Feature: Edit user account information

- Click on the Edit icon ( ) next to the user that you would like to edit. A dialog box will open containing the account information for the user.
- Edit the account, contact, or notification information for the selected user.

- Click the Save button. The dialog box will close.

Feature: Delete a user account

- Click on the Delete icon ( ) next to the user that you would like to remove. You will receive a confirmation dialog box.
- Click the OK button. The user will be removed from the list.



Module: Reports (Top)

The Reports Module allows the public users to create Standard and Custom reports. The Administrator has access to an additional tool to create advanced reports and save them for future use. The Advanced report allows the Administrator to create a custom report from any fields in the Project Detail form. The use of the Standard and Custom reports is described in the Optic User Guide.

The report functionality is broken down into two main parts:

- Search Criteria – The search criteria are the queries that the Administrator will create to obtain the information for the report. The queries are based on a SQL query language.
- Report Criteria – The report criteria define out the report data will be output to the report. These selections allow the Administrator to define the report columns and headers that will be displayed in the report.

To get started, click on the Reports button on the left hand panel. Then, click on the Advanced tab.

Feature: Create an Advanced report

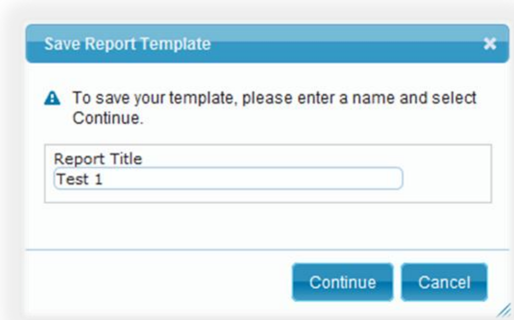
- Select the following Search Criteria:
  - Field Name – Lists all fields in the Project Detail form.
  - Sub-field – Lists the subfields in for the Field Name selected. For example, if the Field Name selected is "Lat/Long Coordinates," then the subfield options will contain "Latitude" and "Longitude." For many Field Names, there are no subfields.
  - Operator – Lists the query options, including:
    - Contains: the selected field contains the Value
    - = : the selected field equals the Value
    - < : the selected field is less than the Value
    - > : the selected field is greater than the Value
    - <= : the selected field is less than or equal to the Value
    - >= : the selected field is greater than or equal to the Value
    - != : the selected field is not equal to the Value
    - IN : the selected field is in the Value (list)
  - Value – Text field to enter the value for the query operator.
  - Action – Allows the Administrator to select "AND" or "OR" for a new entry in the query. The "AND" action allows the query to contain multiple criteria that must all be met, while the "OR" action allows the query to contain multiple criteria which only require one requirement to be met. Also, allows you to remove or add lines to the query.
- Select the Report Fields:
  - Field Name – Lists all fields in the Project Detail form.
  - Sub-field – Lists the subfields in for the Field Name selected. For example, if the Field Name selected is "Lat/Long Coordinates," then the subfield options will contain "Latitude" and "Longitude." For many Field Names, there are no subfields.

- Column Name – Text field allows the Administrator to modify the Column Name displayed in the report.
- Action – Allows the Administrator to remove or add fields to the report.
  - To add a field to the report, click on the add icon ( ). A new row will appear at the bottom of the field list. A maximum of 8 fields is permitted.
  - To remove a field from the report, click on the remove icon ( ). The selected row will disappear.

- Click on the Generate Report button. A new window will open that contains the report details.
- To clear the selections for the report, click on the Reset button.

Feature: Save an Advanced report

- After defining the report and criteria, click on the Save button. A dialog window will open.
- Enter the Report Title and click the Continue button. The new report will be listed in the Prepared Reports drop-down menu at the top of the page.



Feature: Run a saved report

- Under the Prepared Reports drop-down menu, select the saved report that you would like to create.
- Click on the Generate Report button. A new window will open that contains the report details.
- You may print the report by clicking on the Print icon ( ) in the upper right hand corner of the page.
- You may export the report to Excel by clicking on the Save icon ( ) in the upper right hand corner of the page.

Feature: Delete a saved report

- Under the Prepared Reports drop-down menu, select the saved report that you would like to delete.
- Click on the Delete Selected Report button. A dialog window will open.
- Click on the Delete button. The report will be removed from the Prepared Reports drop-down menu.