opti quick start guide

opti helps you locate, connect, share, and integrate IRWMP project information within your IRWM Community. This Quick Start Guide will assist you to jump start the use of *opti*. For more detailed instructions, please refer to the User Guide by clicking on the Help icon in the navigation bar.

How to Gain Access to opti

opti is a public system. On the login screen, input the required information and click on the *Register* button. Once your account has been successfully created, you may enter your email and password in the "Existing Users" box and click *Login*.

How to Navigate opti

Once logged into *opti*, information and tools are accessible via the navigation bar. Click on the icons to display different modules in your screen. Modules provided are:

- **Home** – displays Announcements, Events, and Recently Added Projects
- **New (+)** – click here to add a new project
- **Map** – displays a map of the projects

- **List** – displays a list of the projects
- **Partners** – displays a list of Community Members and Organizations
- **Reports** – provides access to predefined reports and a custom search tool

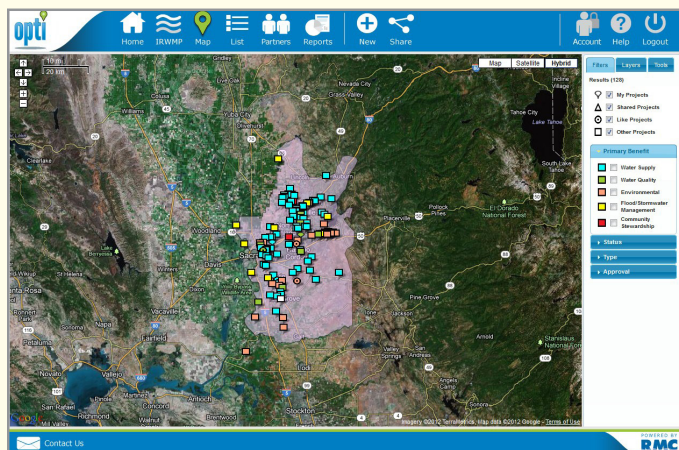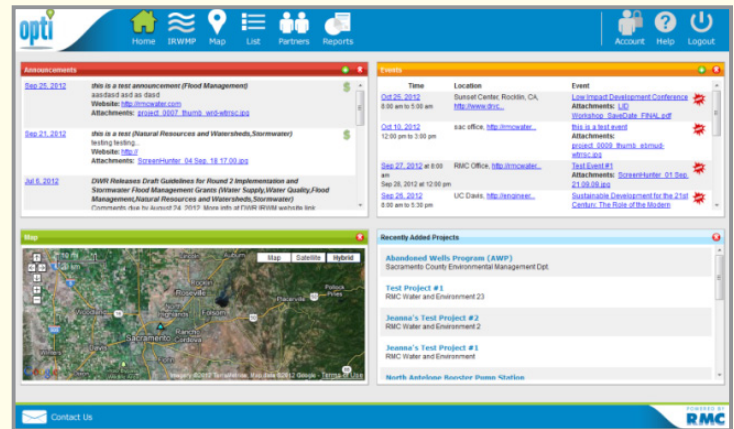## How to View Announcements and Events

Announcements and Events are posted in the **Home** page.

- Click on an Announcement or Event hyperlink to view the details and download attachments.
- Click on the "+" icon in the dashboard banner to add a new Announcement or Event to the site.

How to Become a Community Member

To add and submit projects to *opti*, you must first become a Community Member.

- Click on the **Account** icon to open your profile information.
- Fill out all the required fields and click the *Become a Community Member* button at the bottom of the window. You will receive an email when your request has been authorized.

How to Add a New Project

To add a project to *opti*:

- Click on the **Map** icon in the navigation bar to view a map of projects.
- Then, click on the **New** icon in the navigation bar. If you are a Community Member, the project entry screens will open.
- Fill out the project information and click the *Save* button.
- You may continue to update project information prior to and after submitting the project to the administrator.

How to Share a Project

The Share Tool allows a select group of users to be able to view and edit your project prior to submission.

- Click on the **Map** or **List** icon to access the projects.
- Click on the **Share** icon in the navigation bar to open the Share Tool.

NOTE: your project will not be visible to the public until you have submitted it to the administrator and it has been accepted for publication.

How to View Project Details

To view project details and update your project:

- Click on the **Map** or **List** icon in the navigation bar.
  - In the Map view, mouse over your project on the map and click on the project title when it appears.
  - In the List view, filter the list to show "My Projects" and select your project.
- A new window will open with the project details.
- Click on the *Details* tab on the left hand panel to view and edit project information.

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