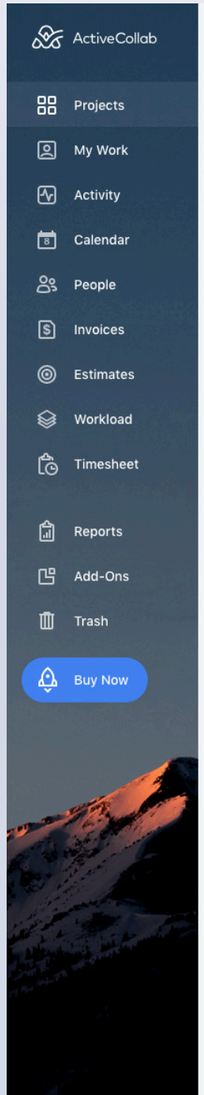
NOTES

ActiveCollab

Powerful, yet simple project management



You submitted a communications request, now what?

1. When you submit a request it doesn't automatically upload into Active Collab. Your email submission is a notification, which alerts the Communications Department of a pending project.

2. Once your emailed form is received, the Communications Department takes care to process the request as quickly as possible.

3. Once the Communications Department begins processing your request, you will receive email notifications as your project gets established in Active Collab and tasks are assigned.

How do I access Active Collab?

1. WOL Website: via wateroflifecc.org/form

2. Directly: via our secure portal at https://activecollab.com/profile

3. Email: You can click on the link inside Active Collab email notifications to be redirected to the site.

Tip: The direct url to the secure portal is mobile friendly and is compatible with your mobile devices.

How do I see what projects I am apart of?

1. On the homepage you will see sections you have access to on the left-hand side. On the right-hand side you will see a section labeled "Projects".

2. The "Projects" section will show you your most current and active projects. You can change the view by clicking "sort".

3. Within the "Projects" section, click on the project title to access the project landing page. The project-landing page is where you can see an overview of project activity as well as a reference of your original request in the "Project Info" drop-down or the "Notes" tab.

4. On the right of your project-landing page, you can see every person who has access to your project.

How do I review project tasks?

1. Click on any project to view the tasks in that project.

2. Within the project landing page, click on the "Tasks" tab located on the top of the page.

3. Once on the tasks page your initial view will be all open tasks at the top and closed tasks at the bottom. Closed tasks will be grayed out and have a green checked bubble next to them.

4. How do you change filters? On the top right, click on the lines, there are 3 options.

5. Each task will list who is assigned to your task from the Communications Department, the name of the task and the

scheduled due date of the task.

Closed Projects/Tasks have a strikethrough line in them.

Tip: Do not leave comments in closed tasks.

How do I comment on a task?

1. Click on "write a comment".

2. You can attach files, pictures, and distinguish text with bold underlined, italics etc.

3. You can also reply to email notifications by clicking on the task link in the email body or by hitting reply to the email notifications directly.

How can I tell who is subscribed to a task?

1. On the right side of the task page, you can see who specifically is subscribed to email notifications for the task.

What do I do if a task is closed, and I need to reorder something?

1. Do not leave comments in closed tasks!

2. Submit a new Communications request, and we can add additional tasks to existing projects for reprints, reorders, revisions etc.

3. Where can you reference additional requests? Notes! Notes can be accessed on the project or task landing page by selecting the Notes navigational tab at the top of the page. Notes are created to host consultation meeting notes and additional communications requests.

How do I access closed projects?

1. From the home screen click on "Projects" on the left-hand side.

2. From there, at the top of the page select "Completed Projects". This takes you to any project that you have ever been added to as a user of Active Collab.

3. Select the project you want from the list.

Tip: You can use the search bar to quickly locate the project your looking for.

Tip: If you were not a part of a past project, you can request to be added to previous projects by contacting the Communications

Department.

How do I modify/customize my homepage?

In your profile/settings you can change your preferences on the appearance of your Active Collab.

How do I get more help?

You can use the search icon or question mark icon at the top of the page for additional help within Active Collab. The Live Support option is very helpful. There are also Video Tutorials.