WAMSI Collaborative Work Area in ACE Project

WAMSI has created an online collaborative **work space**, to share general information within Nodes. There are currently three work areas, the Kimberley, Dredging and WAMSI.
Note this application works best with **Firefox** or Google **Chrome**.

To Login
You can login at https://wamsi.aceproject.com/
Username: **As provided**
Password: **As provided**

Note: that your specific login details should not be shared with other people. You may request login accounts for other people in your research group if required, with read or write access.

To change your Password
1. Click on the avatar icon in the top right hand corner of the page
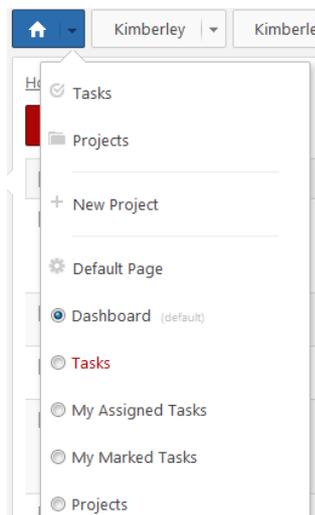2. Enter your new password and confirm it in the box below.

   Password: ••••••••••••••••
   Confirm Password: ••••••••••••••••

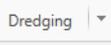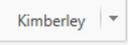3. Press the [Update] button, to effect change.
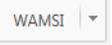
To Logout
1. Press the off button in the top right hand corner of the page.

To change your default home
Click on the Home icon, use the pull down arrow and click on "Default Page" and then select i.e. **Tasks** or **Project** or "**My Assigned Tasks**".

To access a Project (Node) area

1. Select the Projects icon [Projects] on the left and choose a project [Kimberley]
2. <u>Or</u> click on the **named** tab [Dredging] [Kimberley] [WAMSI] at the top
3. If you work on multiple projects and cannot see the named tabs at the top, then click on the red square (white cross) and select all the Projects you have access to.
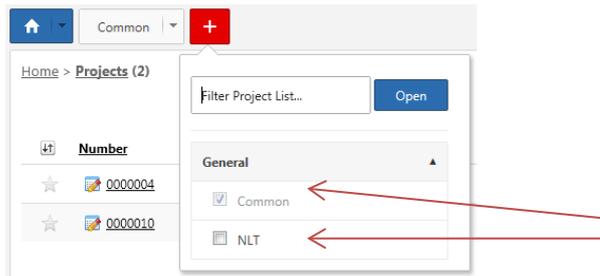
Creating, renaming or deleting a Folder
Note that you can create sub directories under the current folder structure

1. Select the **Documents** tab on the left [Documents] and view the folder structure.

2. Browse to the location that you want to create or delete a folder
3. Type in the name of the sub folder and press the [**Create**] button
4. Or click on the '**Delete this folder**' link to remove the selected folder
5. Retitle the folder by typing in the new name and pressing [**Rename**]
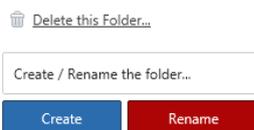
Uploading completed Project Documents
There are two types of Documents that can be stored, **Project** and **Task** Documents.
More detailed instructions about documents can be found at:
http://blog.aceproject.com/knowledgebase-category/documents/

1. Click on the required Project to enter the work area. i.e. [Kimberley] or [Dredging]

2. Select the **Documents** icon on the left [Documents]

3. Browse to folder location now at the bottom left of the screen
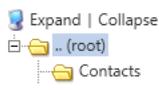
4. After selecting a folder to store the document press the [Browse...] button, top centre

5. Browse to file location and select file; it will automatically load once selected. Note if using Firefox you can Drag and Drop the document to upload.

6. Enter **Version** number and **Lock** 🔓 the document to prevent overwriting and deletion.

7. **Notify select users** via email if required and then press the [**Save**] button.

	Notify selected users...	Cancel	Save
Name Node and Project email		.xlsx (12.72 KB)	
Version ☐ Lock ☐ Public			🗑
Description			

8. In the 'Notify selected users' section, you can you can select everyone by clicking once on '**Check all**', a group by clicking on it i.e. **Kimberley** or individual people by *checking the box* next to their name.

   Note: to prevent anyone modifying or deleting your uploaded document please ☐ **Lock** it and add a version number to it for reference. Documents can be recovered if accidently deleted.

To replace or add to an existing versioned document

1. Click on the 🔒 icon to unlock a document (only displayed if it is your uploaded document)

   Note: the only users who can unlock 🔓 a locked document are Administrators and the user who uploaded the document.

2. Click on the [Browse...] button and select the file with the same name from your computer.

3. Enter same **Version** number as the document you want to replace and press the [Save] button.

4. To **keep** the original document, add a new version number and press [Save].
   Note: that the person and the time the document was uploaded are displayed.

Searching for documents

1. Select the Project if not already in one.

2. Select the Documents tab 📎 Documents on the left

3. Hover on the same Documents tab 📎 Documents | 🗀 Documents 🔍 Search | and choose Search.

4. Type into the '**Text to Search**' field located in the right pane and press [**Enter**] on the keyboard or the [**Apply Filter**] button. The search is applied against the Document Name and Description fields.

Text to Search...
Apply Filter
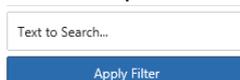
Global search
To search for Field tasks <u>not documents</u>

1. Click in to the Global Search and type item to be found and hit [Enter] on the keyboard.
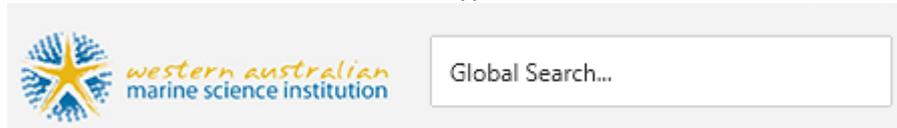
To view the User (People) Directory

1. Got to home, hover over the '**More**' tab on the left   and then select **Directory**. Note the search facility on the right hand side of the screen.
Note: this list also displays the last time a person logged into the system.

How to Create and Assign a Task

1. Select the appropriate Project pull down arrow by clicking on the right edge of the project tab and choosing + Add a Task .

2. In the "New Task" page, fill in a descriptive task in the **Summary** field.

3. You assign the appropriate users as "**Assigned**" or "**Reviewer**" in the task assignment grid located in the "Assignment" section.

4. Press the Save button on the right ☐ Do not notify once complete.

Note: Unless you check the "Do not notify" checkbox prior to clicking on the Save button, the user(s) you assign on the task should automatically receive an e-mail notification. Task assignment/update e-mail notifications can be turned on/off in user profiles. By default, when users are added in the account, all automatic e-mail notifications are enabled.

Accessing Assigned Tasked (secure) Areas

1. Once logged in, you will have access to common project and restricted access to secure areas, if this has been setup for your Project group.

2. To view your assigned areas, please ensure that you are on the **Home** tab first.

3. Hover on the **Tasks** icon on the left ◯ Tasks ◯ My Assigned Tasks and choose "**My Assigned Tasks**".

Note: Normally everyone can access a Project unless prevented from doing so.

Task Documents

Note that this procedure is for managing documents prior to release.

1. Select the appropriate Project to assign a task within.

2. Hover your mouse on Tasks and from the menu choose ◯ Tasks

3. Press the **Add a Task** button to create a new entry.

4. Enter the name of the task in the **Summary** field and a brief description in the **Details**

5. Open the 📅 Estimates ▲ section by clicking on the down arrow.

6. Click once on the icon 📅 beside the **Start Date** to display a mini calendar and choose the required date. Repeat for the **End Date.**

7. Select a person(s) to assign or review to this task. 👥 Assignment ▲ (1 assigned, 0 reviewer)

   Note: that if the person has not got access to the Project, they will still have access to the task document by selecting the Tasks tab and choosing the assigned task.

8. Select the Document Tab Document Dependencies and upload or drag and drop a document into the task.

9. Enter **Version** number and **Lock** 🔓 the document to prevent overwriting and deletion.

Name	130827 WAMSI Ace Project Instructions v1.0	.docx (292.48 KB)
Version	☐ Lock ☐ Public	
Description		

Save ▼

10. Press the [**Save**] button ☐ Do not notify and check the **Do not notify**

Accessing Task Documents

1. Hover your mouse on Tasks and from the menu choose ○ My Assigned Tasks
2. Click the Summary to enter the Task and then select the Documents tab. Note that you can also click on the document icon [1] to view it.
3. Once you are in the Task you can indicate the progress by choosing the appropriate status and selecting the percentage complete. **Status** | In Progress ▼ | 20% ▼
4. You can also also add comments about the task 💬 Comments (1) ▲ and the date and time is logged together with the user **mike** - 10/10/2013 11:16:03 AM .
   Note: This could be used as a tool to indicate who is currently editing the document.


Note: Each Task created has a Comments section for users to leave remarks.

Forum for Researchers

1. Select a Project you want to create a discussion in, by clicking on the named tab.

2. Hover over the **More** tab More on the left and then select **Forum** Forum

3. Add a title and a description and then press the **Save** button.
4. People can reply to a specific topic by clicking on the **Title** and then pressing the

   Reply to this topic button.
5. Type your comments into the edit box and **select** people to notify and then press the [**Post Reply**] button.
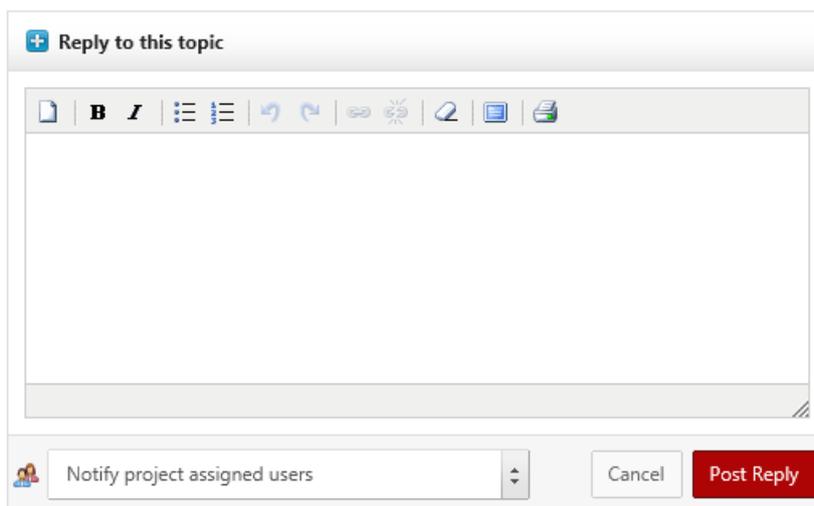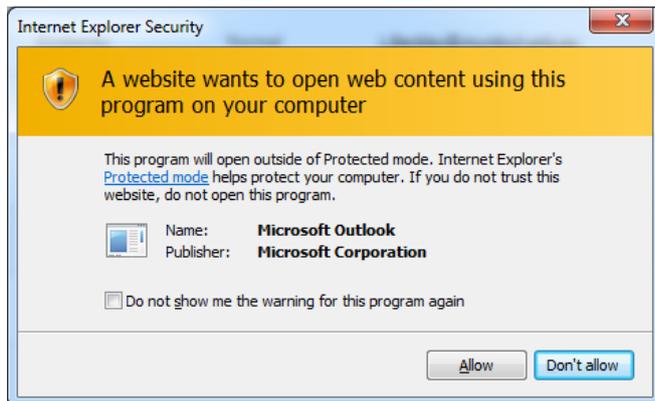

6. Everyone can be selected by clicking once on '**Check all**', or a group by clicking on it i.e. **Kimberley** or individual people by **checking** the box next to their name.
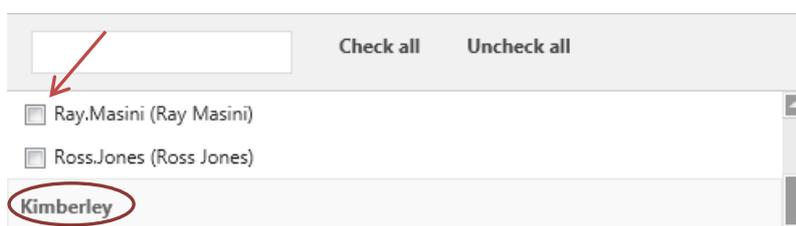
To email individuals using Outlook

1. Select the **More** tab on the left   and then Directory list

    michael.dsilva@wamsi.org.au

2. Click on the e-mail address link
3. Click [Allow] when the following box appears

Mobile Use

This application has the facility to be viewed on mobile devices.

1. Click on the Mobile icon on the top right hand side of the screen.

Note: this has not been tested

E-mailing from within Ace Project

Although Ace Project has an inbuilt email facility it is recommended that it is not utilised.

Help and Support

This document covers the general use of the online application for WAMSI's required purpose.

If you have general questions regarding the use of the application then in the first instance, please check the FAQ section first at http://blog.aceproject.com/kb/

If you have any specific issues relating to its use, then you can e-mail me at: michael.dsilva@wamsi.org.au and I will endeavour to get back to you as soon as possible.

Just a quick note to inform you that you can turn off your ACE Project email notifications by clicking on the avatar (Top right) expanding email notifications   and unchecking the options.