GroveSite Usage Tips
Quick Reference

HOW TO . . .	ESSENTIAL INSTRUCTIONS	WHO
Access and Use Your GroveSite Workspace		
Login	Open your browser and enter your site's URL: https://secure.grovesite.com/orgname/sitename (no www.) On the Login screen: ID: Enter your email address PW: Enter supplied password (case sensitive) **OR** Go to www.grovesite.com and click Customer Login.	P, M, SA
View the site	Click on page names in the left-hand Navigation Bar.	P, M, SA
Open a file or download a file to your PC	Click on the icon by the file; choose to open or save.	P, M, SA
Update your profile; Change your password	Click 'My info' to update your profile, change password, insert a picture, or hide your email address.	P, M, SA
Participate in Discussion Forums	Click [Add a New Posting] to post a question or comment; Click on someone else's question/comment to post a Reply. Check the Email Notification box if you want to be notified of Replies.	P, M, SA
View all your tasks	From any Project Plan page, click [Reports]. You can update your tasks in any GroveSite from this window.	P, M, SA
Edit Information on a Basic Web Page		
Add an item to a page	Click Turn on edit. Click [new item].	M, SA
Edit/move/delete an item	Click Turn on edit. Click [edit] to the right of page item.	M, SA
Post a file	Click Turn on edit. Click [new item]. Set Item type = text/picture OR file to be downloaded Use 'Browse' to locate file and attach it.	M, SA
Insert a link	Click Turn on edit. Click [new item]. Set Item type=link to another website. Enter heading text. In subheading field, type: http://www.domain.com	M, SA
Display a picture	Click Turn on edit. Click [new item]. Use 'Browse' to attach a .jpg or .gif Click 'Add;' watch progress upload window Select formatting (left/right/center/thumbnail)	M, SA
Edit Information on Project Plans, File Libraries, Calendars, Issue Tables		
Add a task to a Project Plan	Click [Add a New Task]. Use [Import Tasks] to add many tasks.	M, SA (maybe P)
Add a row to a Custom Database	Click [Add a new _____] and complete the form attaching a picture if required. Use 'Discussion' to add comments or questions. Edit using single [edit] or [Quick Edit].	M, SA
Upload a file to a File Library	Click [Add a New File] Use 'Browse' to locate/select your file.	M, SA (maybe P)
Add an event to a Calendar	Click on any date, or click [Add a New Event].	M, SA (maybe P)
Add an issue to an Issue Table	Click [Add a New Issue].	M. SA (maybe P)

Key for WHO: P=Participant   M=Moderator   SA=Site Administrator   OA=Organization Administrator

Customize Site By Adding Pages & Using Your Own Terminology

Add a page	Click Turn on edit. Click [new page]. (in Site Navigation area at left) Select page type, click 'Add page.' Enter navigation text, page heading, page security**, and 'add page below.' Click 'Save.'	SA
The __page security__ setting allows you to control who can view or who can add content to that page.	** Set page security for Discussion pages = **participants can see and update.** This security option is also available for Project Plan, File Library, Issue Table, and Calendar pages to allow someone enrolled as a Participant to upload information and edit or delete his/her information.	
Edit page properties (navigation text, heading, security, order)	Click Turn on edit. Click [edit] in the left-hand Site Navigation area, just to the right of the page name.	SA
Delete a page	Click Turn on edit. Click [edit] in the left-hand Site Navigation area, just to the right of the page name.	SA

Customize Site Appearance

Add/edit headers, logo etc.	Click Administration. Click Manage Site Text, Logo, and Settings.	SA
Add/edit color scheme, width, fonts	Click Administration. Click Manage Site Style, Background and Colors.	SA

Enroll Members

Enroll members
 	
GroveSite will send an email invitation to each new enrollee, with URL, ID and GroveSite-assigned password; you can choose to assign your own password and/or NOT to send email invitations.
	Click Administration. Click Enrollment.
	Step 1:
	-Enter information in Names box**:
	    Email address, first name, last name, title, co, phone
	-Select Site Role (Participant, Moderator, or Site Admin)
	-Click 'Go to Step 2'
	Step 2:
	-Edit Welcome and Instruction text as desired
	-If you do NOT want GroveSite to send email invitations,
	  check the box marked 'No Invitation.'
	-If you want to assign a specific password, type the
	  password in 'Default Password' field.
	-Click 'Enroll Now'
	
	**Only the email address is required for subsequent sites.
		SA

Change/delete member's role	Click Administration. Click Manage Participants.	SA

Create New Sites

Add a New Site	Click Administration. Click Switch to Organization Administration Mode. In the panel that appears at left, click 'Add New Site' Enroll a Site Administrator who to customize the site and enroll members	OA