

HOW TO ...	ESSENTIAL INSTRUCTIONS	WHO
Access and Use Your GroveSite Workspace		
Login	Open your browser and enter your site's URL: http://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 use login fields on right.	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].	M, SA (maybe P)
Bulk upload tasks to a Project Plan	Click [Bulk Upload]. Use the excel template to enter a series of tasks. Save the file as a tab delimited text file and upload the file.	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)

Customize Site By Adding Pages & Using Your Own Terminology		
<p>Add a page</p> <p><i>The page security setting allows you to control who can view or who can add content to that page.</i></p>	<p>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.'</p> <p>** 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.</p>	SA
<p>Edit page properties (navigation text, heading, security, order)</p>	<p>Click Turn on edit. Click [edit] in the left-hand Site Navigation area, just to the right of the page name.</p>	SA
<p>Delete a page</p>	<p>Click Turn on edit. Click [edit] in the left-hand Site Navigation area, just to the right of the page name.</p>	SA
Customize Site Appearance		
<p>Add/edit headers, logo etc.</p>	<p>Click Administration. Click Manage Site Text, Logo, and Settings.</p>	SA
<p>Add/edit color scheme, width, fonts</p>	<p>Click Administration. Click Manage Site Style, Background and Colors.</p>	SA
Enroll Members		
<p>Enroll members</p> <p><i>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.</i></p>	<p>Click Administration. Click Enrollment.</p> <p>Step 1: -Enter information in Names box**: <i>Email address, first name, last name, title, co, phone</i> -Select Site Role (Participant, Moderator, or Site Admin) -Click 'Go to Step 2'</p> <p>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'</p> <p>**Only the email address is required for subsequent sites.</p>	SA
<p>Change/delete member's role</p>	<p>Click Administration. Click Manage Participants.</p>	SA
Create New Sites		
<p>Add a New Site</p>	<p>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</p>	OA