

7 MY ACCOUNT

To use Groove, you must have an account and at least one identity in your account. Your Groove account contains your Groove identity(ies), password, and information on the machines on which you run Groove. To view or edit your account options from Launchbar, select Edit – Preferences. Use the top tabs to switch between account options.

8 NOTIFICATIONS

You can send an instant message to any Groove contact. You can also send a message to all members of a workspace. Your message can include audio recordings, file attachments, and Web address (URL) references. Do any of the following to open the Send Message dialog box:

- Double-click on a contact name

OR

- Select **Options – Send Message**

OR

- Highlight a workspace in Launchbar - Select Options – Send Message to Members to automatically address a message to all members of a currently selected workspace

OR

- Right-click one or more contact names and select Send Message

OR

- Press **Shift - Shift**

When within a workspace, select Send Message to Members in the Common Tasks pane.

9 ALERTS

Alerts are designed to keep users informed of new or modified information in workspaces.

- Set Alerts for an entire workspace from the Common Tasks pane within a workspace.

- Keep track of changing information on an individual tool basis by right-clicking on the tool tab and selecting Set Alerts. This will override any workspace settings.

- For individual files or folders within workspaces, right click on the file or folder, and select Properties – Alerts.

- To stay apprised of Contacts – going offline, returning from offline or idle state, entering a workspace or tool – right click on the contact name and select Set Alerts.

10 GROOVE TOOLS AND TOOLSETS

NAME OF TOOL	USE OF TOOL
CALENDAR	Manage the schedule of events and meetings for members of a workspace.
CONTACT MANAGER	Share select contacts with other members of a workspace.
DISCUSSION	Conduct and maintain threaded discussions, with optional file attachments or links to other tools.
DOCUMENT REVIEW	Include files and comments to initiate a review cycle with selected members.
FILES	Store, share, and preview files. Launch co-edit/co-review sessions for Word and PowerPoint files.
FORMS	Create your own custom tool for data capture and reporting.
MEETINGS	Set up agendas, record minutes, and assign action items.
NOTEPAD	Record multiple pages of presentation notes, instructions, or directions.
OUTLINER	List, move, promote and demote brainstorming ideas.
PICTURES	Store, share, and view .bmp and .jpg files.
PROJECT MANAGER	Set up and manage simple project tasks.
SKETCHPAD	Create sketches using lines, shapes and text. Import and mark up background images.
TEXT	Simple text editor with 'real-time' typing.
WEB BROWSER	Co-browse the Web or share your favorites.
WELCOME PAGE	Include a picture and a summary message for the workspace.

TEMPLATES

Asset Requests - Asset Request form tool template, Customizable Discussion form tool template

Customer Reference - Files, Customizable Discussion, Customer Reference form tool template

Customizable Discussion - Customizable Discussion, Files

Deployment Planning - Deployment Planning form tool template, Customizable Discussion

Document Review - Discussion, Files, Document Review

Issue Tracking - Issue Tracking form tool template, Customizable Discussion

Office Management - Office Calendar form tool template, Bulletin Board form tool template, Employees form tool template, Contacts form tool template, Meetings, Files

Opportunity Tracking - Customizable Discussion, Customer Tracking form tool template

Reference Library - Customizable Discussion, Files, Asset Reference form tool template

Relationship Management - Discussion, Files, Meetings

Virtual Meeting - Discussion, Files, Meetings

Program Reference - Program Reference for tool template, Customizable Discussion, Files

Status Reports - Status Reports form tool template, Customizable Discussion

groove virtual office

quick reference guide

GROOVE VIRTUAL OFFICE BASICS

www.groove.net

1 STARTING GROOVE VIRTUAL OFFICE

Your options for starting Groove Virtual Office depend on the options you selected during installation, such as placing a Startup icon on your Desktop, or including Groove in your system Startup Folder. You can always start Groove from the Windows Start menu.

- Click **Start**, then select **Programs – Groove** or double-click the Groove icon.
- Enter your password and click **Login**.

2 ABOUT GROOVE LAUNCHBAR

The Launchbar opens when you first start up Groove Virtual Office. You can initiate all Groove activities from the Launchbar, including creating workspaces, sharing files, and sending messages.

The Launchbar contains two panels, one for creating and managing your workspaces, and the other for adding and managing Groove contacts. Use the **Workspaces** and **Contacts** tabs at the top of the Launchbar to switch between the two. Both panels include a Common Tasks section at the bottom that changes to correspond with your current activity or selection. This allows you to quickly access your most commonly used tasks.



3 ABOUT WORKSPACES

A workspace is a place where people share files, manage projects, and create custom tools to work together. A workspace begins with the person who creates it. That person then invites others to join. Workspace components are flexible and are decided by the person who creates the workspace. They include tools, shared content and an area for chatting.

- **File Sharing:** Synchronizes any standard Windows folder with others and across multiple computers.
- **Standard:** For sharing data, tracking discussions, managing projects, and creating custom tools.
- **Custom Workspace:** Select from one of our sample workspace templates.

4 CREATE NEW WORKSPACE

You can create a new workspace that initially includes a Files and Discussion tool, or a custom workspace template. In either case, you can customize a workspace after you create it by adding and removing tools at any time. Once you have your workspace set up, you can invite other people. To create a new workspace:

- Select **New Workspace** from the Launchbar menu
- Select the **Workspace Type**
- Name the workspace
- Click **OK**

A workspace is created and lists you as the initial member with the role of Manager. You can now customize the workspace and invite people to join as members.



5 INVITE PEOPLE TO A WORKSPACE

You can invite someone to a workspace using email, Windows® Messenger, or Groove. To invite someone to a workspace:

1. Go to the workspace
2. In the workspace members panel, enter the **name** (if they are already one of your Groove contacts) or **email address** (if you don't have them as a Groove contact) in the "Invite to Workspace" box.
3. Click **Go** to open the Send Invitation dialog box.
4. Assign a role (Manager, Participant, or Guest) to the recipient(s).
5. Add message text if desired.
6. Click **Invite** to send the invitation.

If the person you're inviting is already using Groove, and is listed as one of your Groove contacts, Groove sends the invitation as a Groove message. For email addresses, Groove sends the invitation as an email message with an attached invitation.

6 MY CONTACTS


Contacts are the people that you interact with. You can add contacts to your personal list in the Launchbar or to a Contact Manager tool in a workspace. You can also import contacts from Microsoft Outlook®.

Adding personal contacts in Launchbar

1. Open the Launchbar and select the Contacts tab.
2. Click **Add Contact**.
3. Type in the contact name and click **Search**.

Import contacts from Microsoft Outlook

1. Open Microsoft Outlook – select the contact(s) you want to move to Groove.
2. In the upper left menu bar, click **Send to Groove – Send to Existing Space**.
3. Select **My Contacts**, click **OK**.

Tip: The yellow and red **unread mark**  displays next to a space, tool, or entry where there is new information that you have not yet opened.