



# **BITRIX USER GUIDE FOR GOVERNANCE COMMITTEE MEMBERS**

Collaboration is the key to success

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# Welcome to the GMG Community on Bitrix!

Bitrix24, commonly referred to as Bitrix, is the new GMG collaboration workspace. It will provide members, volunteers, partners, and GMG staff with a complete and unique interface to communicate, network, streamline, and collaborate in all matters related to GMG.

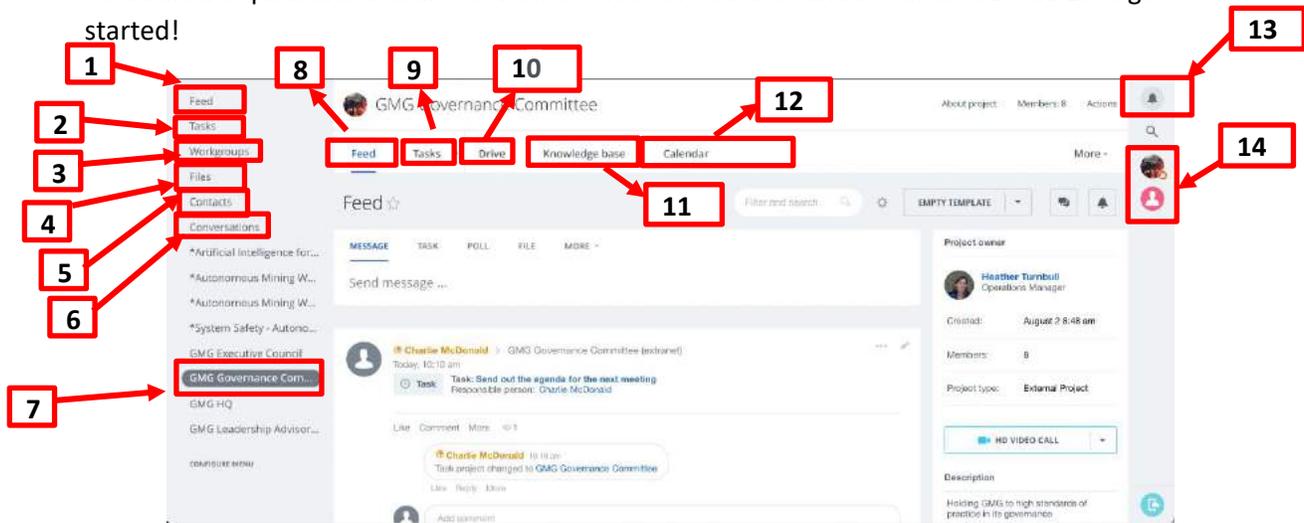
Bitrix provides you with a unified and single web-based platform for managing your GMG files, projects, workgroups, tasks, feed, contacts, workflows, and conversations. Everyone in your team will be able to coordinate, keep track of tasks, and effectively work together on projects, initiatives, and activities.

Main Bitrix features include:

- **Collaboration Tools** (live editing of documents, chats, stream messages, polls, voice, and video calls)
- **Project Management** (tasks, subtasks, and recurring tasks)
- **Document Management** (file storage and sharing, integrations, and document library)

## Overview of Bitrix Features

Find below a quick and useful overview of the main features and benefits of Bitrix. Let's get started!



1. **Feed:** Main space for collaborating and engaging with other members of the Governance Committee.
2. **Tasks:** A list of all tasks which have been assigned to you and a brief overview of each.
3. **Workgroups:** In Bitrix, GMG Working Groups are called workgroups. The ones you see are the ones you participate in.
4. **Files:** Where all files of each workgroup you participate in are stored, including personal files you upload to your storage drive.

5. **Contacts:** Everyone who participates in this workgroup.
6. **Conversations:** Direct conversations with everyone in this workgroup.
7. **GMG Governance Committee:** Direct access to the Governance Committee site.
8. **Workgroup feed:** Latest posts made to the Governance Committee site.
9. **Workgroup tasks:** Tasks assigned to any member of the Governance Committee.
10. **Drive:** All documents for the Governance Committee divided into folders. A search bar is available to search for specific documents or folders.
11. **Knowledge base:** Information and resources relevant to the Governance Committee.
12. **Calendar:** Upcoming meetings or events only visible to members of the Governance Committee.
13. **Notification center:** Notifications about new messages, tasks, invitations to workgroups/projects, “likes” to posts and comments, etc.
14. **Mini panel:** Messenger indicators such as a general Governance Committee chat and private chats.

## Getting started

Start using Bitrix now by following these 4 quick steps:

1. Check your email account for a Bitrix invitation notification to join a Bitrix account
2. Accept and follow the link from the invitation
3. Create your own password
4. You are now set and ready to start collaborating in Bitrix!

**Note:** Bitrix offers a mobile app for [IOS](#) and [Android](#), as well as a [desktop](#) application all of which are available and free to use, however we’ve found accessing Bitrix through a web browser to be the fastest and easiest method to access the site.

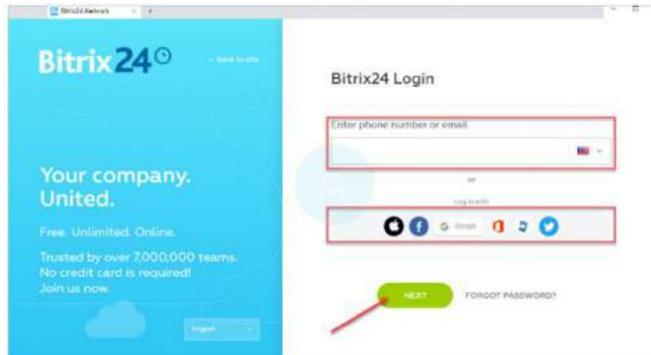
## Your Bitrix Account

Now that your Bitrix account is set up, you can log-in and start accessing the GMG site [here](#).

Here are the first few steps to get you started and help you customize your account.

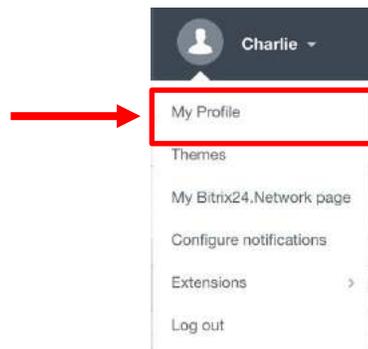
### Login

Sign in to your Bitrix account using the login and password information. Enter your email address or phone (whichever you used to create your account), click the **Next** button, and enter your password. If you have a social network you want to use to log in with, click the corresponding icon.



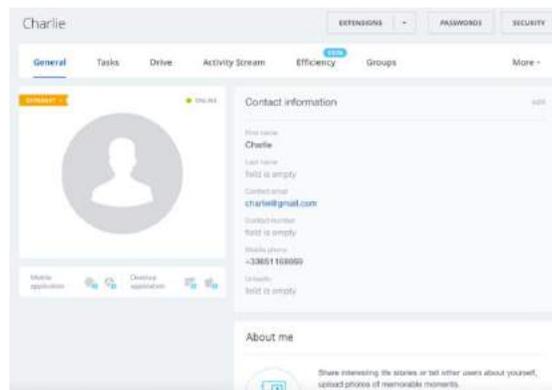
## Your Profile

In the top right-hand corner of the site, you will find your name. By clicking on that you can access your profile and settings.



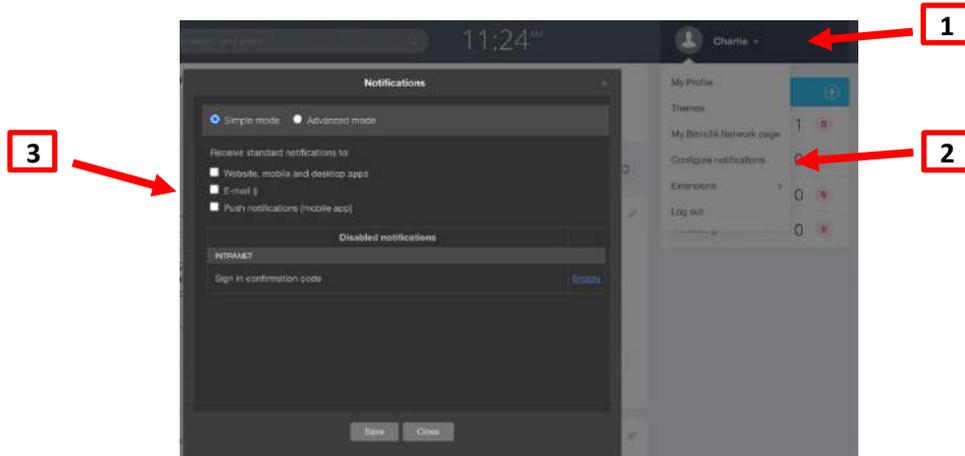
Open your profile for editing and adding some details, such as uploading a photo, adding your position, contact details, LinkedIn profile, and much more such as sharing interesting stories or photos to tell others about yourself.

Everything in your profile, including your contact information will be visible to all other users in the GMG Bitrix site. Keep this in mind as you choose which information to include.



## Configure Notifications

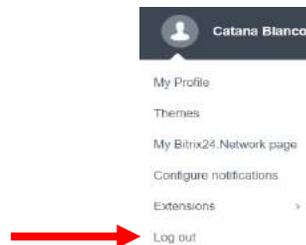
You can configure notifications by clicking your [Profile](#) button > [Configure Notifications](#).



**Quick note:** By default, email notifications are disabled. You can always enable them in the [Configure Notifications](#) section.

## Log Out

To log out of your Bitrix account click on your [Profile](#) button > [Log Out](#).

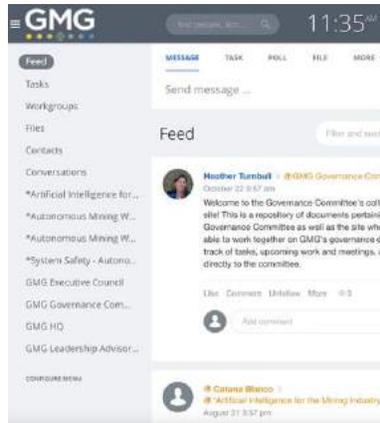


## Main Menu

This is a breakdown of the main Bitrix features that you will find handy to get the best out of this great collaboration platform.

One of the pages you will be frequenting often on Bitrix are the [Workgroup](#) pages. A workgroup is the Bitrix term for each of the individual sites within the broader GMG site. Committees, the Leadership Advisory Board, the Executive Council, as well as each working group and project will each have their own workgroup site.

On the left-hand side of the site, you will find the Main Menu bar. This links you to everywhere on the Bitrix site you might want to visit and provides easy access to each workgroup that you are a part of.

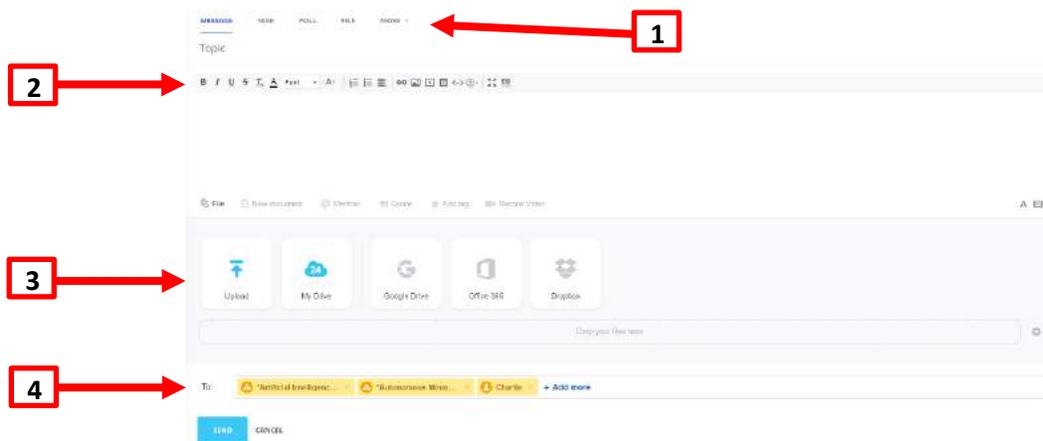


## 1. Feed

The feed is one of the main tools for interacting and engaging in Bitrix. It resembles the feed(s) in your workgroup(s) and provides you with a unified and interactive space to stay on top of what's going on, contribute to discussions, and access real-time updates and activities. You can also create tasks, send appreciations, make announcements, add mentions, share files, videos, leave comments and like posts, create polls, and receive feedback from other volunteers!

The main purpose of the feed is to provide a space for internal communication with the other members of each workgroup you have joined, so everyone's feed will be unique. However, the feed also allows further customization for each user.

### 1.1 Posting on the Feed

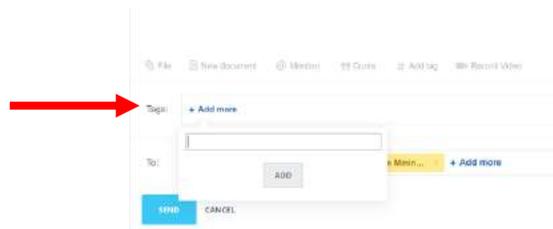


1. Select the type of post you would like to make. Most posts will likely be a message; however, you also have the option of creating a task, a poll, sharing a file, or making an announcement.

- a. If you choose to send a message, it is recommended to add a message topic, so the post is clear to all users. Click the topic button at the bottom right corner and enter the message topic into the corresponding field.
2. Use the visual editor to edit the message formatting.
3. Attach files and images to your message by clicking the upload files button. You have several options to select from: upload files from your PC, Bitrix Drive, or external drive (such as Google Drive or Dropbox), or you can also create a new document using Bitrix.Docs. You can also add a link, quote text, or mention a user.
4. Select recipients. Messages can be sent to any users who are found in your contacts (your contacts are a list of people who you share one or more workgroups with), or to one or more workgroups.
5. The message recipients will see your post in their feed. To add a new recipient, click the Add More button and select a user.

Note: Posting a message on the feed is not a private message. For a private message

**Quick tip:** If there are lots of messages in the feed and there is a need to find a specific message, you can search for a tag, if the message has one. To help others find your messages and posts more easily, you may consider adding tags to them.

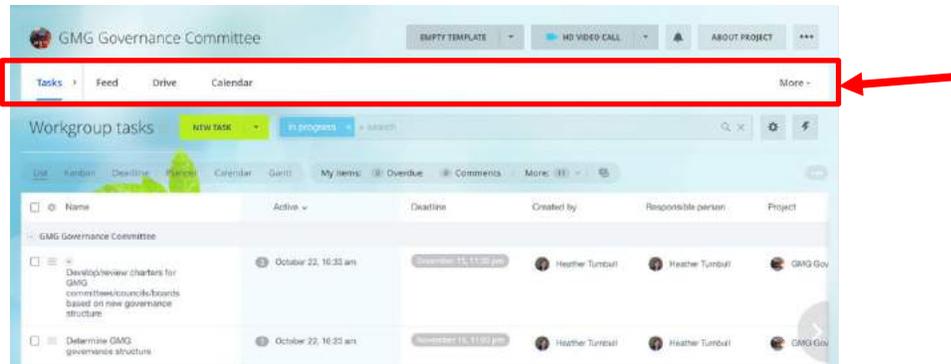


## 2. Workgroups

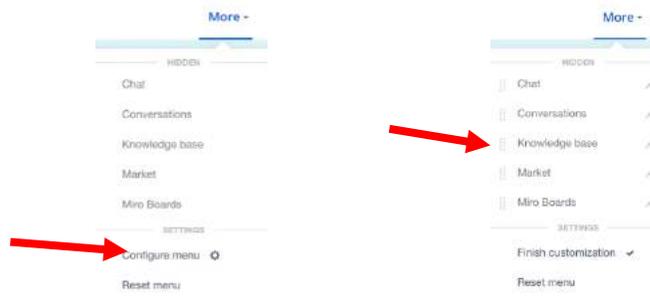
The Workgroups tab houses links to each of these sites, however only workgroups which you have joined will be visible.

When you open the Workgroups page, you will see all the workgroups which you are a member of. Click the name of the workgroup you wish to open to view the page.

When you open a workgroup, it will appear similar to this:



## 2.1 Configuring the menu



Near the top of the page, you will see the Workgroup Menu Bar.

On the right-hand side of the menu under the More button, click on Configure Menu to arrange the icons which appear on the workgroup menu bar.

We recommend that you drag the Knowledge Base to the main menu bar as this is a useful space which houses all pertinent information on the committee, roles, responsibilities, priorities, governance documents, and more. More information on what is in the Knowledge Base can be found in the designated Knowledge Base section below.

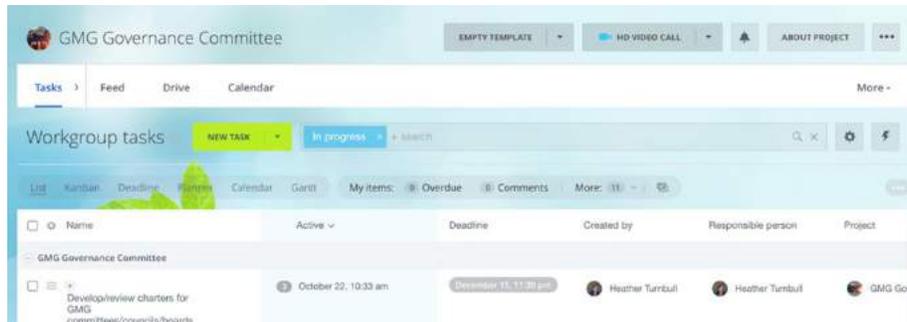
## 2.2 Setting the homepage

The default home page for when you open the workgroup is the Tasks page.

If you select Configure Menu, you can then click on the pencil icon next to a page in the top menu bar, and select Set the home page to make this the page you will see first when you first open the workgroup.

You might find it useful to set the Feed as the Section Home Page to see the latest updates when you first open the workgroup.

## 2.3 Tasks



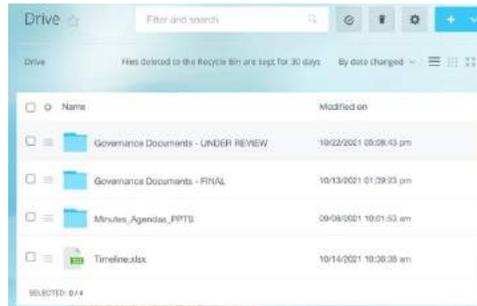
- The Tasks page will show which tasks have been assigned to any member of the committee.
- Assigned tasks: Tasks that have been assigned to you will appear here, as well as in the Tasks section of the left-hand menu bar.
- Adding tasks: To add a new task, simply click New Task and then follow the instructions that will appear.

## 2.4 Workgroup Feed



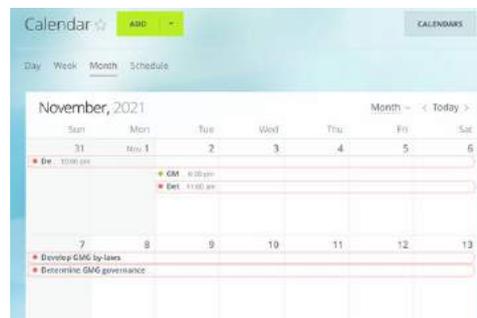
- The feed shows the latest posts which have been made to the group. Posts can include messages, documents, polls, announcements, and more.
- Posts in the feed will only be visible to committee members.
- Posts in this committee feed will also appear in your main feed, available on the left-hand menu bar.
- Creating a post:
  - To create a post, select the type of post you would like to make and then compose the post.
  - You have the option to tag specific committee members in the post.

## 2.5 Drive



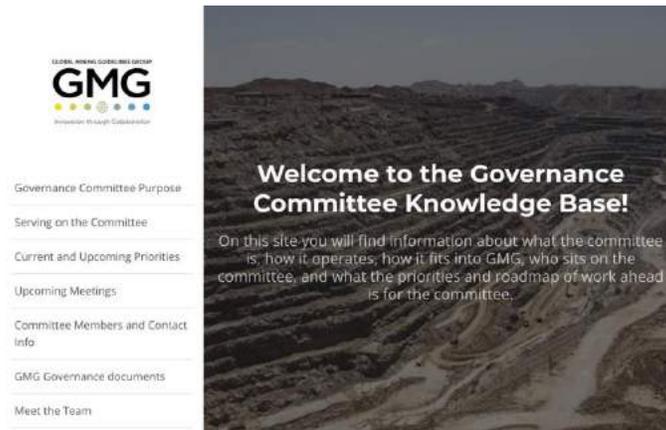
- The Drive houses all documents for the workgroup, within folders.
- A search bar is available at the top to search for a specific document or folder.
- In the right-hand corner you can add a document or folder to the drive.
- By selecting a document or folder, you can move, rename, or edit the file/folder.

## 2.6 Calendar



- The Calendar page shows upcoming meetings or events in the schedule.
- Only meetings or events for this committee will appear here, and these are only visible to members of this committee.
- Adding a new calendar item: use the green Add button at the top of the page.

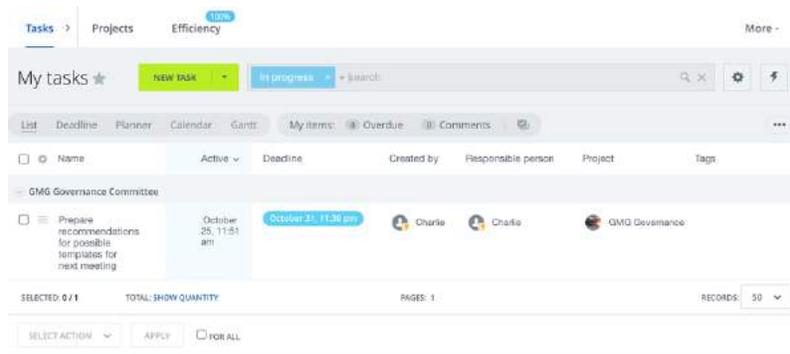
## 2.7 Knowledge Base



- If you don't see the knowledge base in the *Workgroup Menu Bar*, it can be found under the *More* button on the top right-hand corner of the *Workgroup Menu Bar*. We recommend that you configure the menu, so that it always shows the *Knowledge Base*.
- In the knowledge base you will be able to access information and resources useful to this committee. All this information is also housed either on the GMG website or elsewhere in the committee workgroup site.

## 3. Tasks

When you open the *Tasks* page from the left-hand menu bar the page will appear similar to this:



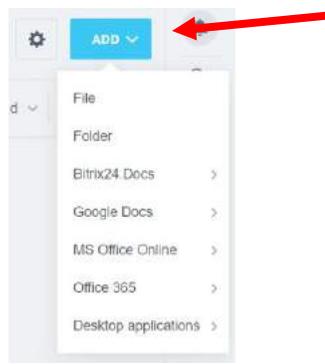
- Any tasks which have been assigned to you will appear here, along with an overview of the task.
- For further information or to edit a task, click on the task name.
- By clicking on the *Projects* tab in the top menu bar, you will find a list of workgroups you are involved in.
  - When clicking on a specific workgroup, you will be brought to the *Tasks* page of that workgroup's site.
  - The projects tab on the menu bar will show which projects you are a part of. By clicking on the project, it will take you to the tasks page within that project.

- Creating a task: To create a new task, simply select the green New Task button and fill in the pop out tab.

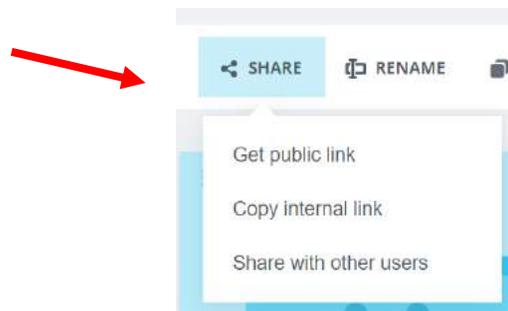
#### 4. Files

On the left-hand side menu, you will find the Files tab in which you will be able to access documents and files that you store in your Bitrix Drive. This would be your personal file storage inside Bitrix. When you upload files to the space, they are only visible to you, unless you choose to add them to a workgroup drive or share them with others.

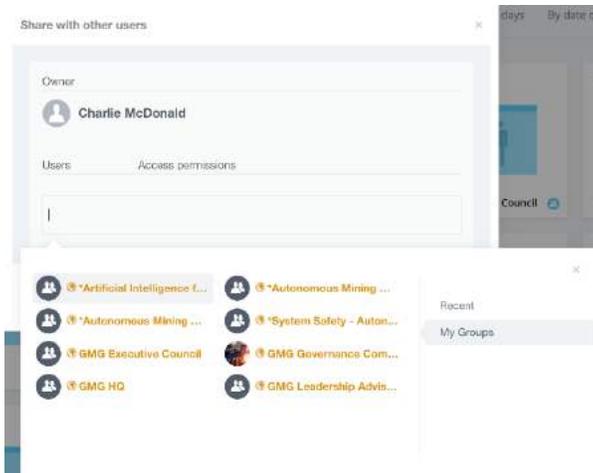
To add files and folders to drive, simply click on the Add button at the top right corner. You can also create a new file using Google Docs, MS Office Online, Office365 or one of the desktop applications installed on your computer.



To allow access to a particular file or folder to another committee member, simply click the Share button.

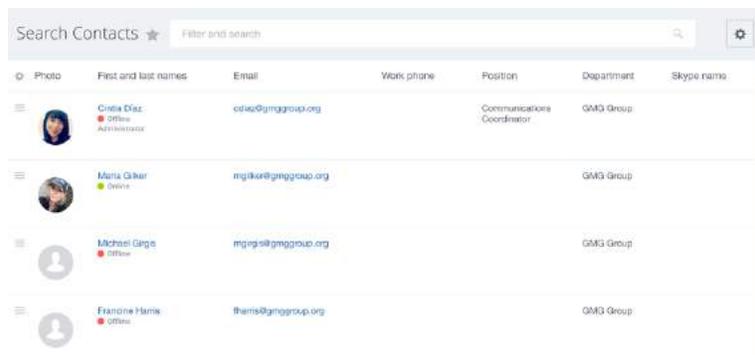


With the Share with other users button, you can choose to share the file with one or more individual users or with one or more workgroups, and select which permissions to assign to the file. If the file is shared with a workgroup it will appear in the workgroup drive.



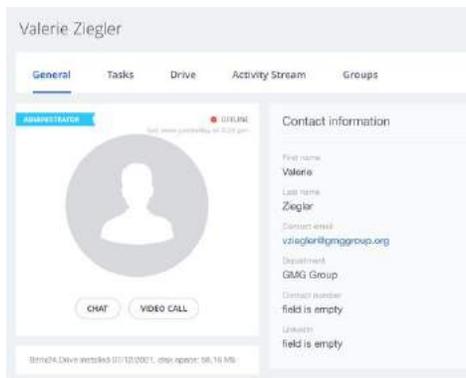
## 5. Contacts

Clicking on Contacts on the left-hand menu bar will redirect you to the contacts page, as shown below:



Here you will be able to see and access all the contacts with whom you share a workgroup.

When you click on a contact's name it will take you to their profile.



On their profile you will be able to see the contact information they have chosen to share, which workgroups you are both in, and which tasks they have been assigned in those groups. Once we fully launch all workgroup sites, including GMG HQ, all GMG volunteers will appear on your Contacts

page. Bear in mind that your profile information will also appear in other users' contacts, so any information you choose to include in your own profile will be visible to all other users.

From their profile, you can connect with this contact using their email or phone number, if provided, or directly through Bitrix using either the chat or video call buttons.

## 6. Conversations

The integrated messenger feature allows you to stay connected, get system notifications, and, most important, communicate with other volunteers by exchanging instant messages.

Create chats with individuals, a group of people, or an entire workgroup.

Users who have enabled notifications of new messages will be notified (by email or via application notification, as selected). By default, email and application notifications are disabled.

Bitrix offers voice and HD video calls to talk directly with any of your contacts, the people who are a part of one at least one of your workgroups. Once GMG's Bitrix site is fully launched to all volunteers, this will include a GMG HQ site, which all volunteers will be invited to, in order to allow all GMG Bitrix users to be able to directly message or communicate with any other volunteer.

### 6.1 Notifications Panel

The notifications panel is located on the right side of the site and includes the notifications bell icon and private message indicators.



### 6.2 Notifications center

The notifications center, accessed by clicking on the bell icon, shows you notifications about new messages, new tasks, invitations to workgroups/projects, new "likes" to your posts and comments, etc. These notifications are shown at the top right corner.

### 6.3 Workgroup/project chat

All members of a workgroup are added to the chat automatically. You cannot invite new users to the workgroup chat, you need to add them to the workgroup first.

## 6.4 Private chats

Users can create private chats with restricted access. A chat of this type will not be shown to all users in the chat list. Only those users who have been invited to this chat will see it.

Private chat users can share files, make voice/video calls, and participate in conferences.

**Quick note:** Account administrators don't have access to private chats if they are not listed as chat members.

## 6.5 General chat

General chat is available in all Bitrix accounts. This is a general chat for all Bitrix users, so all account users can read messages in this chat, send messages, and leave comments.

# Troubleshooting, Support, and Feedback

If you have any questions, feedback, need help troubleshooting, or need support regarding Bitrix, please don't hesitate to reach out to Heather Turnbull at [hturnbull@gmggroup.org](mailto:hturnbull@gmggroup.org)

