Login to ProjectSolve

1. Open your web browser
2. Go to http://www.projectsolve2.com/
3. Click   ProjectSolve Login Access
4. Enter your email address
5. Enter your password
6. Click   Proceed

Tip: Use "Save login info" for quicker login.

Change Your Password

The easiest way to change your password is:

1. Start ProjectSolve
2. Go to the My ProjectSolve page
3. Click   my member info
4. Click   Change Password
5. Enter existing password in   Old Password
6. Enter new password in   New Password
7. Re-enter new password in   Confirmation Password
8. Click   OK
9. Click   OK

Tip: Use Forgot Your Password on the login page to have ProjectSolve reset your password.

Manager the Plug-in

To turn the plug-in on or off:

1. Start ProjectSolve
2. Go to the My ProjectSolve page
3. Click   -- Tools and Support Resources --
4. Click "Manage Plug-in"
5. To turn on the plug-in, click ⦿ Plug-in software
6. To turn off the plug-in, click ⦿ Just the web browser
7. Click   OK

Tip: You must have admin rights to your PC

View a File

To view a file you have Read access to:

1. Start ProjectSolve
2. Find the file you wish to view
3. Right-click on the file's icon
4. Click   View

Tip: Simply clicking on the file name will default to "View" mode as well.

Upload a File - Without the Plug-in
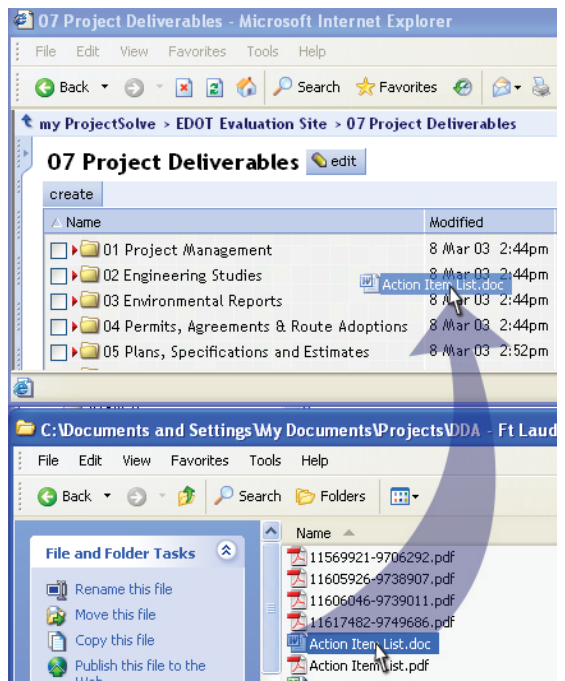
Use the "Add File" button to add a file to ProjectSolve:

1. Start ProjectSolve
2. Go to the appropriate Project Site page
3. Click   add file
4. Click   Browse...
5. Select the file to add
6. Click   Open
7. Click   OK

Tip: This will allow you to add one file at a time.

Upload a File - With the Plug-in

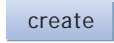Drag 'n' drop files from local PC to ProjectSolve:

1. Start ProjectSolve
2. Go to the appropriate Project Site page
3. Open Windows Explorer adjacent to ProjectSolve
4. Select the file(s) to add to ProjectSolve
5. Press and hold left mouse button to grab selected files
6. Drag and drop selected files into grey working area on Projectsolve

Tip: It is possible to copy multiple files and folders at one time using this method.

Create an Object

To create one of the custom objects shipped with ProjectSolve:

1. Start ProjectSolve
2. Go to the appropriate Project Site page
3. Click [create]
4. Click an object icon to select it
5. Fill in the information as requested

Tip: You can also create an object by selecting [create] at the bottom of the page or [create item] on the ProjectSolve menu.

Set Access Control for a File

To modify a file's access settings:

1. Start ProjectSolve
2. Find the file you wish to assign access control
3. Right-click on the icon
4. Click [Access Control]
5. To assign Read rights, click to the right of Open [   ]
6. To assign Write rights, click to the right of Edit [   ]
7. Check ☑Read only to lock the file
8. Check ☑Hidden to hide the file
9. Check ☑Reserved for editing to reserve the file
10. Click [OK]

Tip: You must have "Edit" rights to a file in order to change the access settings for that file.

Send an Alert

To send an alert to another site member:

1. Start ProjectSolve
2. Go to the appropriate Project Site page
3. Click
4. Select members to send message to
5. Click [OK]
6. Update Subject [   ]
7. Update Message [   ]
8. Click [OK]

Tip: When updating the "Message" do not touch the code included by the system. This creates the URL link in the email.
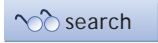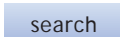
Set a Custom Notification

To create a notification schedule for a specific file:

1. Start ProjectSolve
2. Find the file you wish to be notified about
3. Right-click on the icon
4. Click [Notification]
5. To be notified immediately, click
   ◉ Yes, as soon as each change happens
6. For a nightly summary, click
   ◉ Yes, nightly
7. To turn off the custom notification, click ◉ No
8. Click [OK]

Tip: To turn off nightly notifications for the entire site, uncheck ☑Send a nightly summary of all changes in the Project Site.

Search the Site

To search the Project Site for a specific file:

1. Start ProjectSolve
2. Go to the main page of the Project Site
3. Click [👓 search]
4. Enter the word or phrase to search for
5. Add a date range (Optional)
6. Add a file owner (Optional)
7. Click [search]

Tip: You can also search using [search] in the map area.

ProjectSolve Support

To request additional assistance or technical support please send an email to:

support@projectsolve.com

For emergency, after-hours support please call:

1-866-390-5970

For assistance setting up a new ProjectSolve site, please contact:

info@projectsolve.com