

# WorkDrive Tutorials

These tutorials/modules are illustrated, step-by-step guides meant to ease you comfortably into your use of Zoho WorkDrive. They are set up to allow for self-paced independent study by those who prefer it, but can also be used along with personal guidance at any time if you feel more comfortable learning that way. There are many images in these tutorials and they won't look as crisp in WorkDrive's preview mode as they actually are; if you download the files to your device, they'll look much better and be easier to use.

You'll learn most easily if you take on the material in chunks that feel manageable to you, taking breaks when you feel like your brain has had enough. Nobody learns well when their attention is fading, so it's important to stop when you need to. It'll be much easier for you when you're feeling refreshed and ready to jump back in.

Anytime you'd like some help, have questions, or would like to offer any feedback about these materials, you can email us at [TrainingHelp@montourtrail.org](mailto:TrainingHelp@montourtrail.org) and an MTC volunteer will get back to you promptly. Additional modules will be added in the future as needed, so feel free to let us know about additional topics you'd like to see.

[WorkDrive User FAQ](#)

## **Level One Modules—Basic Orientation for All WorkDrive Users**

If you've been invited to use WorkDrive as a General Member, the only tutorials you'll need to review are Modules 1A and 1B.

If you will be using WorkDrive with a personal login—because you are associated with a specific committee, Friends Group, or other work group—Module 1B doesn't apply to you but all other Level One modules do.

Level One modules are meant to be done in order. They'll familiarize you with why WorkDrive is important for MTC, walk you through your initial account setup, and familiarize you with the basics of what you'll see and what everything means.

If your intention is only to read/view material in WorkDrive, then most of what you'll need to know is in the Level One modules. This might be the case, for example, if you're on a committee or in a group where someone else is doing the content management for the group and you just need to be able read the most recent notes, plans, etc. You might be interested in Module 2E (Favorites and Pinning) and Module 2H (Searching for Content), but you can skip all the remaining Level Two modules.

Don't worry about trying to memorize this stuff because it will always be available for your reference if you need it. Just go over it enough that you know where to look if/when you need to. Most users will find it helpful to print up at least some of the modules for easy reference next to their computer as they're learning or practicing new material. You're likely to find that this all starts to fall into place more easily than you expected.

*Pro Tip: If you open a folder of modules and they're displaying out of order, click on **Name ↑** at the top of the listings a couple of times until they appear in the order you want.*

### Level One Modules

<b><u>Module 1A</u></b> Why MTC Needs Zoho WorkDrive	<b><u>Module 1B</u></b> How the General Member Login Works	<b><u>Module 1C</u></b> Opening Your Account and Getting Set Up	<b><u>Module 1D</u></b> Logging In and Logging Out
<b><u>Module 1E</u></b> Tour of WorkDrive Page Features and Functions	<b><u>Module 1F</u></b> Accessing, Reading, and Downloading Content	<b><u>Module 1G</u></b> Changing Your Account Profile Information	<b><u>Module 1H</u></b> Roles and Permissions

### Level Two Modules—The How-To's

Level Two modules show you how to perform the basic functions that most WorkDrive users will need. It's important to go through all Level One modules first so that it's easier to understand what you're seeing here.

Modules 2E, 2I, 2J and 2M apply to all WorkDrive users, while the remaining modules are applicable to specific Roles (Module 1H), which are clearly identified within each module. Remember that you may have different Roles in the various Team Folders where you are a member, so the functions you can perform within a given Team Folder will depend on your Role there.

You can save some time by having a look at Module 2A to get started, then picking and choosing among the rest as you wish in any order, depending on what you think you'll need to know first.

Your private My Folders area (you'll know about this from Module 1E) is the perfect place to experiment with new skills before using them in any Team Folders you've joined where you have the permissions required to manage content. You can practice the skills as much as you'd like until you feel well-prepared to use them with confidence elsewhere.

Modules will be added to this section over time if needed so if there's any additional topic you'd like to see here, let us know via email at [TrainingHelp@montourtrail.org](mailto:TrainingHelp@montourtrail.org).

### **Level Two Modules**

#### **Module 2A**

Preview of File and Folder Management Options

#### **Module 2B**

Creating, Naming, Uploading New Content

#### **Module 2C**

Deleting Files and Folders

#### **Module 2D**

Editing Content That is Already on WorkDrive

#### **Module 2E**

Favorites and Pinning for Personal Organization

#### **Module 2F**

Moving Files and Subfolders

#### **Module 2G**

PDFs, What You Need to Know

#### **Module 2H**

Renaming Files and Subfolders

#### **Module 2I**

Searching for Content

#### **Module 2J**

Sharing Content from WorkDrive

#### **Module 2K**

Subfolders

#### **Module 2L**

Uploading New Content

#### **Module 2M**

Setting Your Preferences for Notifications

## **Level Three Modules—For Team Folder Admins and Organizers**

Level Three modules describe how your Team Folder fits into the larger structure of MTC's WorkDrive, along with the various specialized functions you'll need to know in order to manage it. If you are a Team Folder Admin or Organizer and would like to request any topics for additional Level Three training modules, please let us know at [TrainingHelp@montourtrail.org](mailto:TrainingHelp@montourtrail.org).

### **Module 3A**

Orientation for Admins  
and Organizers

### **Module 3B**

Adding and Removing  
Team Folder Members

### **Module 3C**

Changing Member Roles  
and Permissions

### **Module 3D**

Team Folder Settings

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