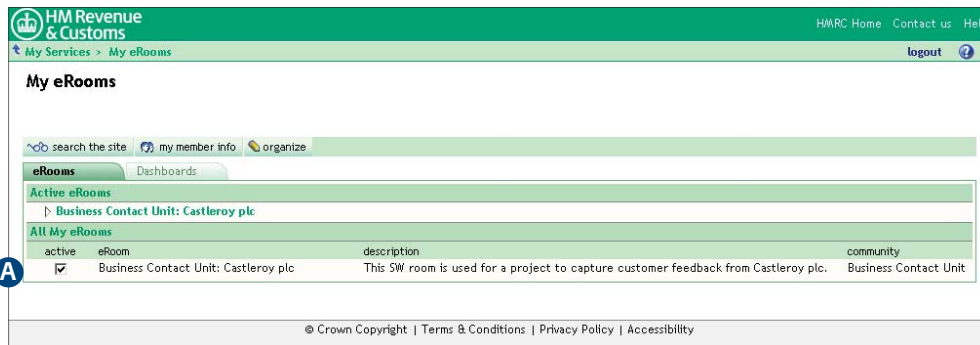# Customer Member

Tracking versions and editing files

1 Navigate to the **My eRooms page** and **select** the appropriate Room (A) from the list of available Rooms.

**A** available Rooms

With the plug-in

2 Navigate to the location of the **file/document** (B) to be edited.

3 Select **list view** (C).

Note

You can reserve a file for editing to prevent other members making changes while you are editing it. To do this, right click the mouse with the cursor over the file icon; select **access control** and check the **reserved for editing** check box. You can only edit a file or document for which you have edit rights. This is indicated by a yellow crayon (D).

4 Select the **edit** icon (yellow crayon) (D) alongside the file/document you want to edit.
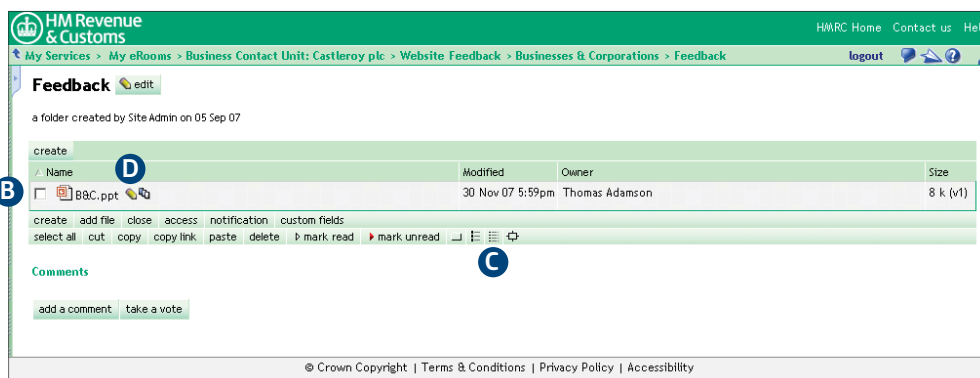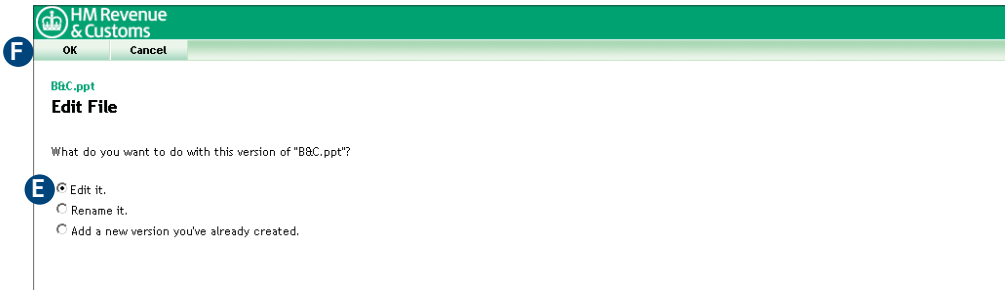

B list of files/documents

C list view button

D edit icon (yellow pencil)

5   Select the radio button alongside **Edit it** (E).
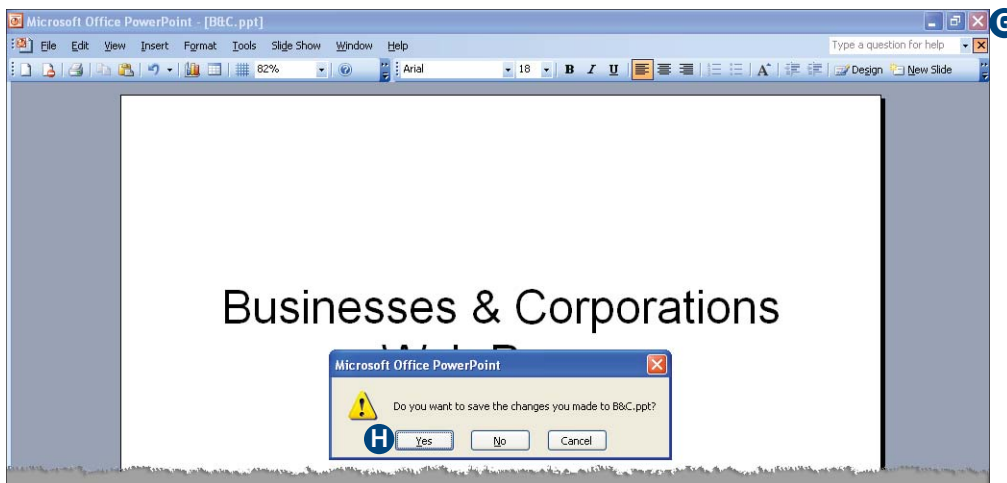
6   Select **OK** (F).

E   radio button

F   OK button

7   The document opens to allow you to make the necessary amendments.

8   Close the file by selecting **X** (G).

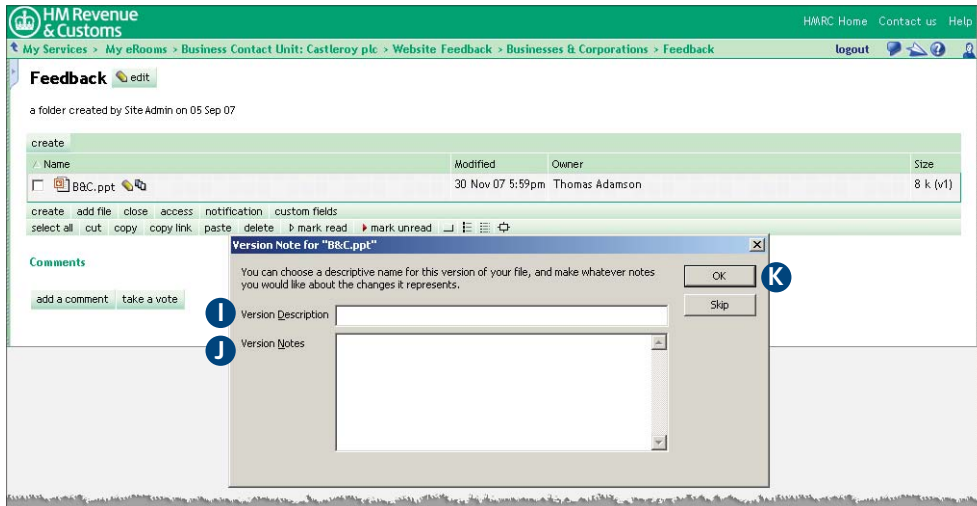9   To save the changes select **Yes** (H).

G   red **X**

H   Yes button

10 Complete the **Version Description** (I) and **Version Notes** (J) fields.

11 Select **OK** (K).

I Version Description field

J Version Notes field

K OK button

12 The **modified field** (L) will display the date you edited the file or document and the Size field displays the **latest version** (M).

13 Selecting the **version icon** (N) lists all the versions of a file or document.

L Modified date field

M Size field

N version icon

Note
Press F5 to refresh the screen to ensure you are viewing the latest information.

Without the plug-in

Those **without** the plug-in facility have to use the following process to edit a file or document.

- Select the **edit file** icon (yellow crayon) alongside the file to be edited.
- On the Edit File screen, select the **Edit it** radio button, then **OK**.
- A **link** to the file is displayed. Select this link to open the file.
- Edit the file, then select the **Back** browser button.
- You are asked do you want to save the changes. Select **Yes**.
- The **Save As** window appears. Navigate to an area on your own computer where you want to save the modified file, then select **Save**.
- You are taken to the **Edit File** screen.
- Select the **Add** button to open the **Choose file** window.
- Locate and highlight the modified file and select **Open**.
- On the **Replace File** screen select **OK**.
- On the **Add Version Note** screen, make any notes and select **OK**.