Quick Reference Guide

Customer Member

Adding a file

With the plug-in

If file not already created

- 1 Navigate to the **location** (A) where the file is to be added.
- 2 Select add file (B).



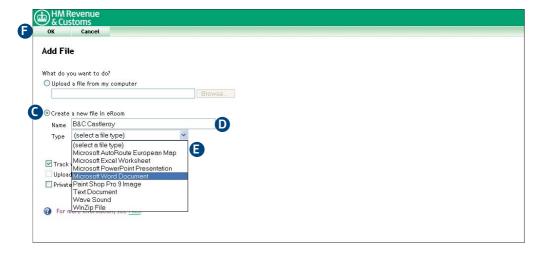
- A Location
- **B** add file button

- 3 Select create a new file in eRoom (C).
- 4 Name the **new file** (D).
- 5 Select the appropriate file type from the **drop down menu** (E).
- 6 Select **OK** (F).



Note

The drop down list will only include applications you have access to.

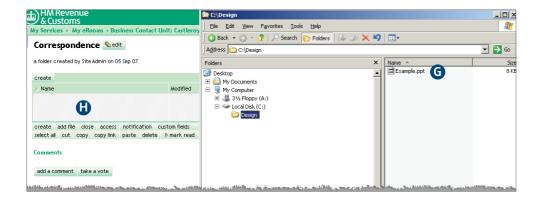


- Create a new file in eRoom radio button
- **D** file Name field
- E file Type drop down menu
- **F** OK button

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If file already created

- 1 Open Windows Explorer and **locate the file** to be added (G).
- With Windows Explorer and Shared Workspace open at the same time, drag the file from **Windows Explorer** to the Shared Workspace **location** (H).



- **G** file in Windows explorer
- H Shared Workspace location

Without the plug-in

- 1 Navigate to the **location** (I) where the file is to be added.
- 2 Select **add file** (J).

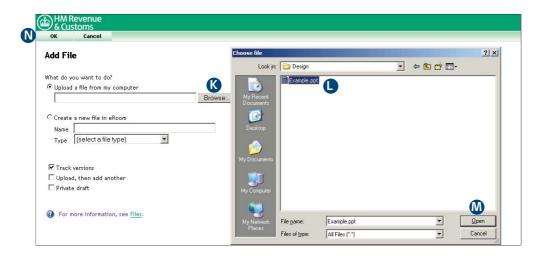


- Location
- **1** add file button



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- 3 Select **browse** (K).
- 4 Find the **file** (L) you wish to add.
- 5 Select **open** (M).
- 6 Select **OK** (N).



- **K** Browse button
- File to be added
- M Open button
- N OK button