

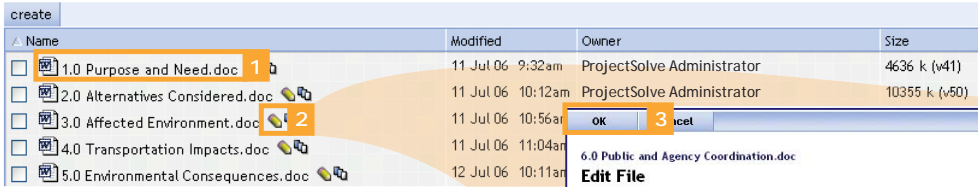


Requirements

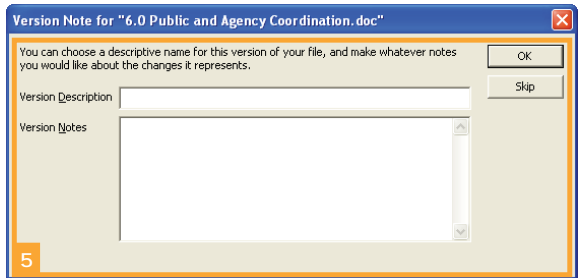
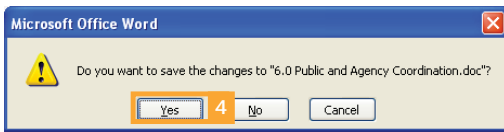
1. Your name must be listed as an “Owner” of the file in order to edit a file (if your name is not listed, contact the owner of the file and ask that you be added as one of the owners under the “Access Control” command). You will see the  icon next to the file if you are able to edit the file.
2. You need to have the application the file was created in.

Edit a Document with the Plug-In

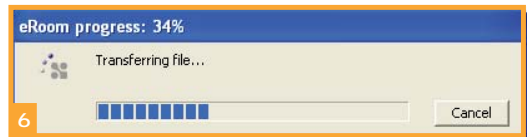
- 1 Login to ProjectSolve and locate the file to be edited.
- 2 Click the  icon to the right of the file name to display the “Edit File” screen.



- 3 Select “Edit it”, then “OK” the file will open in it's native application. The file will automatically be put in “Reserved to Editing” mode, preventing anyone else from editing the file.
- 4 Once you have made your edits, close the file. You will be asked if you want to save the changes: select “Yes”.

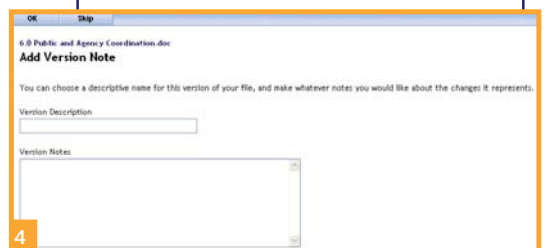
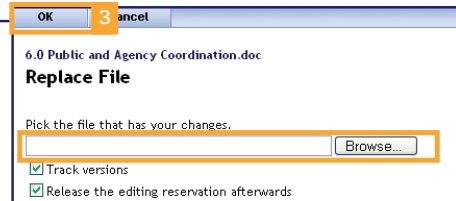
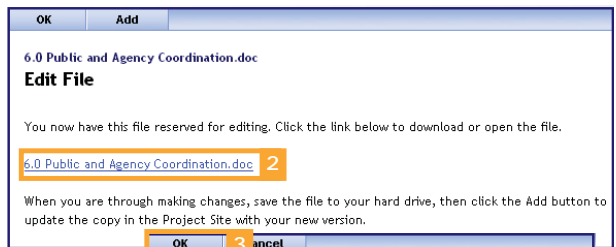


- 5 If “Track Versions” has been turned on, the next screen displayed will be the “Version Note.” You can enter a note and click “OK” or you can select “Skip” to begin transferring the file back to ProjectSolve.
- 6 After the “Transfer File” screen has disappeared, your file has successfully uploaded to ProjectSolve.



Edit a Document without the Plug-In

- 1 Follow steps 1 through 3 above.
- 2 Click on the File Name and follow the steps to save the file to your hard drive. Go to the location on your hard drive where you saved the file, open it and make your edits. After making your edits, save and close the file.
- 3 To upload your file back to ProjectSolve and release it so others can edit it, follow steps 1 and 2 above. This time, the next screen displayed will be the “Replace File” screen. Click on the “Browse” button to locate the file on your hard drive, select it and click “Save” then “OK” once the file appears in the “Replace File” window. The file will transfer back to ProjectSolve.
- 4 If “Track Versions” has been turned on, the next screen displayed will be the “Version Note:” enter a note(s) or select “Skip”. Your file has now been successfully uploaded to ProjectSolve.




For Tips, Notes and Best Practices as well as Troubleshooting see reverse side

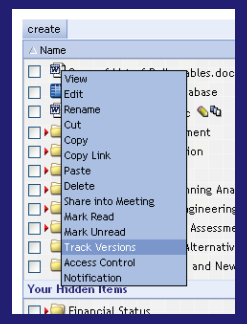
Tips, Notes and Best Practices

- ❖ Turn on “Track Versions” if multiple members will be working on the same file.
- ❖ Always upload the document if you leave your desk or if you are turning off your computer.
- ❖ ProjectSolve is set to disconnect after 4 hours of non-use. If you are going to be working on a file for more than 4 hours, periodically go to ProjectSolve and click around on the site to keep it running.
- ❖ While you have the file in “Edit” mode, no one else can edit the file until you upload the file back to ProjectSolve and release it.
- ❖ Only one person can edit a file at a time.
- ❖ If you are going to edit a file always open it in “Edit” mode as described on the other side.
- ❖ If you do not open the file in “Edit” mode and you make edits to the file, your changes will not be saved back to ProjectSolve if a member opened the file in “Edit” mode after you did.
- ❖ If you open the file in “View” mode and see a change that needs to be made, close the file and open it in “Edit” mode as described on the reverse side.


Turning On “Track Versions”

1. You must be an “Owner” of the file.
2. Right-click over the document icon.
3. Select “Track Versions”.
4. To view the different versions, click on the “Track Versions” icon  to the right of the file.

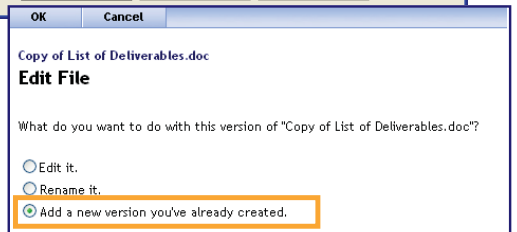
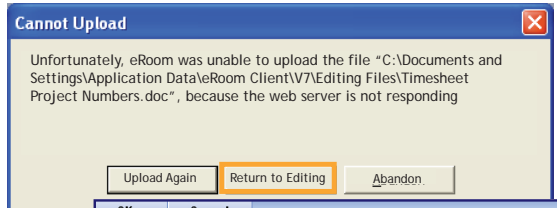
Note: The “Track Versions” feature keeps a history of the document, it does not show the changes made to the document unless that feature is turned on in the application.




Troubleshooting

1. If you get the error message, “Unfortunately the file could not be uploaded to ProjectSolve” follow these steps:
 - a. Immediately click “Return to Editing” or open the file listed under your recent documents in the application and then select “File - Save As” and save the file to a location on your hard drive.
 - b. Login to ProjectSolve, locate the file you edited and click the  and select “Add a version you’ve already created” then “OK” and follow the instructions on-screen to upload your file.

If you downloaded the file and made edits to it but do not have rights to edit the file on ProjectSolve you will not be able to upload your edits until you contact the owner of the file and request that you be added as one of the owners. Once added, follow the steps in 1b above.



2. If you get the error message “Unfortunately ProjectSolve could not upload your file because the item is reserved” and you clicked on the  to edit the file, follow these steps:
 - a. Immediately “Return to Editing” or open the file listed under your recent documents in the application and then select “File - Save As” and save the file to a location on your hard drive.
 - b. Login to ProjectSolve, locate the file you edited, right-click over the file icon and select “Access Control.” Deselect “Reserved for editing” and then click “OK”.
 - c. You will be asked if you want to “Abandon your Changes” or “Add a new version you’ve already created.” Select the appropriate option and follow the on-screen instructions.

