

ERM Quick Guide

Renaming Project Documents

Target audience: ERM users who have RGO and HREC Administrator roles in the ERM system

Summary

This quick guide explains how the HREC Administrators and RGOs can change the name of a document uploaded with a form submission.

Renaming a document in the Review site

This functionality allows the HREC administrator and RGOs to rename the documents submitted with an application.

When a document is renamed in the Review site the document name is automatically changed in the Applicant site for consistency.

Open the project and click on the Documents tab.

The screenshot displays the ERM system interface. On the left is a sidebar with various action icons. The main content area shows project details for 'HIRO BETA TEST 17/07/2019 1'. Below this, there are tabs for 'Timeline', 'Project', 'Documents', 'Data', 'Contacts', and 'Correspondence'. The 'Documents' tab is active, showing a table of 'Form Documents'.

Type	Document Name	File Name	Version Date	Version	Size	View	Archived
Other project-related documentation	Test.doc 1	Test.docx	08/07/2019	1	11.5 KB	Download	<input type="checkbox"/>

Below the table, there is a section for 'Review Documents' with a '+ New Document' button and a note: 'Note: There are currently no documents listed'.



In the Form Documents table, click on the row of the document.

In the pop-up window, click on the Document Name field and edit the file name.

Document Edit ×

Type	Document Name	Version Date	Version
Other project-related documentation	<input type="text" value="Test doc 1"/>	<input type="text" value="08/07/2019"/>	<input type="text" value="1"/>

You can also edit the Version Date and Version of the document.

Document Edit ×

Type	Document Name	Version Date	Version
Other project-related documentation	<input type="text" value="New Document name"/>	<input type="text" value="08/07/2019"/>	<input type="text" value="1"/>

Once you have finished editing, click on the Save button.

Notice that the new name displaying in the Form Documents table.

[Timeline](#)
[Project](#)
[Documents](#)
[Data](#)
[Contacts](#)
[Correspondence 1](#)

Form Documents

Type	Document Name	File Name	Version Date	Version	Size	View	Archived
Other project-related documentation	<input type="text" value="New Document name"/>	Test.docx	08/07/2019	1	11.5 KB	<input type="button" value="Download"/>	<input type="checkbox"/>

The new name is also updated in the Applicant site.

ERM Applications Home Contacts Help - MR APPLICANT TEST - 56321

Work Area

40 Notifications

Actions

Project Duplicate Form Create Sub-form

Share Roles Transfer Form

Completeness Check Submit NMA Project

Print Correspond

Project Tree

- HIIRO BETA TEST 17/07/2019 1
 - HREA
 - SSA Form Qld - TEST Admin Only

Form Status	Review Reference	Date Modified	NMA
Further Information / Modification Requested	N/A	09/09/2019 14:01	Project is not for NMA

Navigation Documents Signatures Collaborators Submissions Correspondence History

Documents

Type	Document Name	File Name	Version Date	Version	Size	View
Other project-related documentation	New Document name	Test.docx	08/07/2019	1	11.5 KB	Download
Other project-related documentation	Test 2	Test.docx	08/07/2019	1	11.5 KB	Download

Download All as Pdf

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The document name change event is recorded in the Project History.

ERM OLD Work Area Meetings Contacts Help - Settings Ms Gisele Azambuja

Work Area

Project Title: HIIRO BETA TEST 17/07/2019 1

Project Id: 56321 Applicant Name: Mr APPLICANT TEST

Submissions Tree Documents Data Approved Contacts Correspondence History

Project History

Search history...

Form Reference	Action	Date
SSA Form Qld - TEST Admin Only	On document Test doc 1: Document name changed from Test doc 1 to New Document name.	09/09/2019
SSA Form Qld - TEST Admin Only	GA TEST emails:	07/08/2019
SSA Form Qld - TEST Admin Only	GA TEST emails:	07/08/2019
SSA Form Qld - TEST Admin Only	Correspondence Received	17/07/2019
SSA Form Qld - TEST Admin Only	Further Info Requested 'G:	17/07/2019
SSA Form Qld - TEST Admin Only	Form submitted	17/07/2019
SSA Form Qld - TEST Admin Only	Submit Application:	17/07/2019
SSA Form Qld -	SSA Form Qld - has been created as a sub-form.	17/07/2019
HREA	Approved:	17/07/2019

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Version 1.2 24 September 2019