

ERM Quick Guide

Work Area – Managing Folders

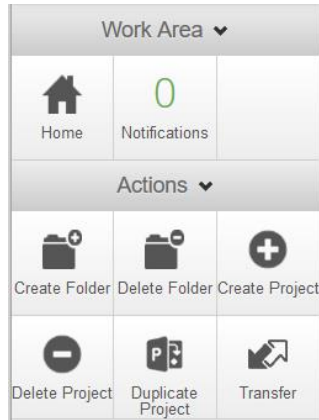
Target audience: Applicant users in ERM

Summary

This quick guide explains how to create folders in the work area to help manage and sort your projects by filing them in folders.

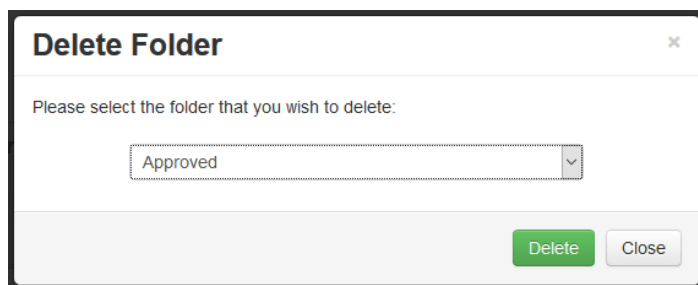
Creating Folders

1. Log into ERM and go to the Work Area.
2. Select **Create Folder** button under the Actions pane.
3. Name the folder and click **Create**

A screenshot of the 'Create Folder' dialog box. The dialog has a title bar with the text 'Create Folder' and a close button (X). Below the title bar, there is a text input field labeled 'Folder Title (maximum 40 characters):*'. At the bottom of the dialog, there are two buttons: a green 'Create' button and a grey 'Close' button.

Deleting Folders

1. Log into ERM and go to the Work Area.
2. Select **Delete Folder** button under the Actions pane.
3. Click **Delete**

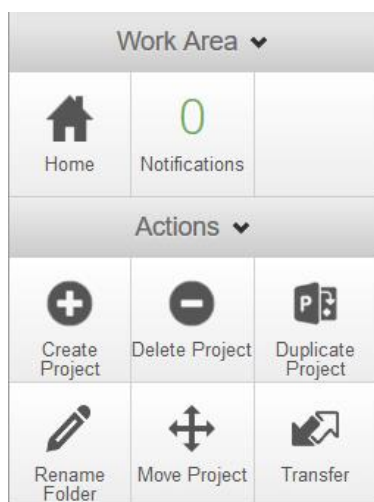


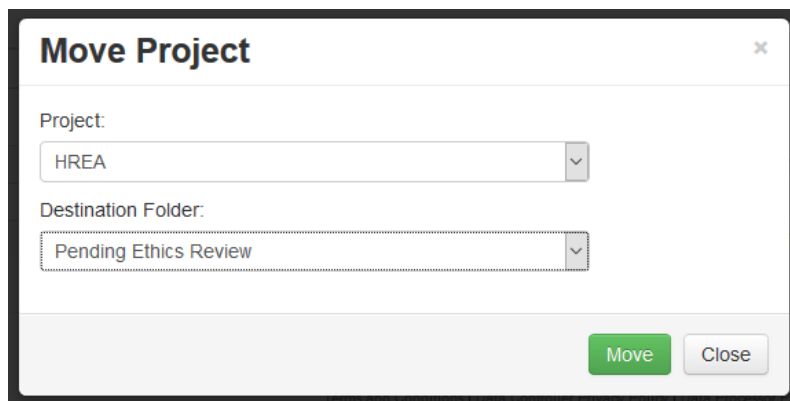
Moving Projects

To move a project to the folder, you will need to drag and drop it.

If the project is already in a folder and you would like to move the project

1. Choose the folder which contains the project
3. Select the **Move Project** button under the Actions pane
4. Click the project you wish to move as well as the new location folder.





Work Area

General

Notifications	Signatures	Transfers	Shared
0	0	0	15

Folders

In progress	Invest Initiated	Registries	Sponsored RCT's	Pending Review	Approved
3	2	3	4	1	3

For further information, please contact:

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