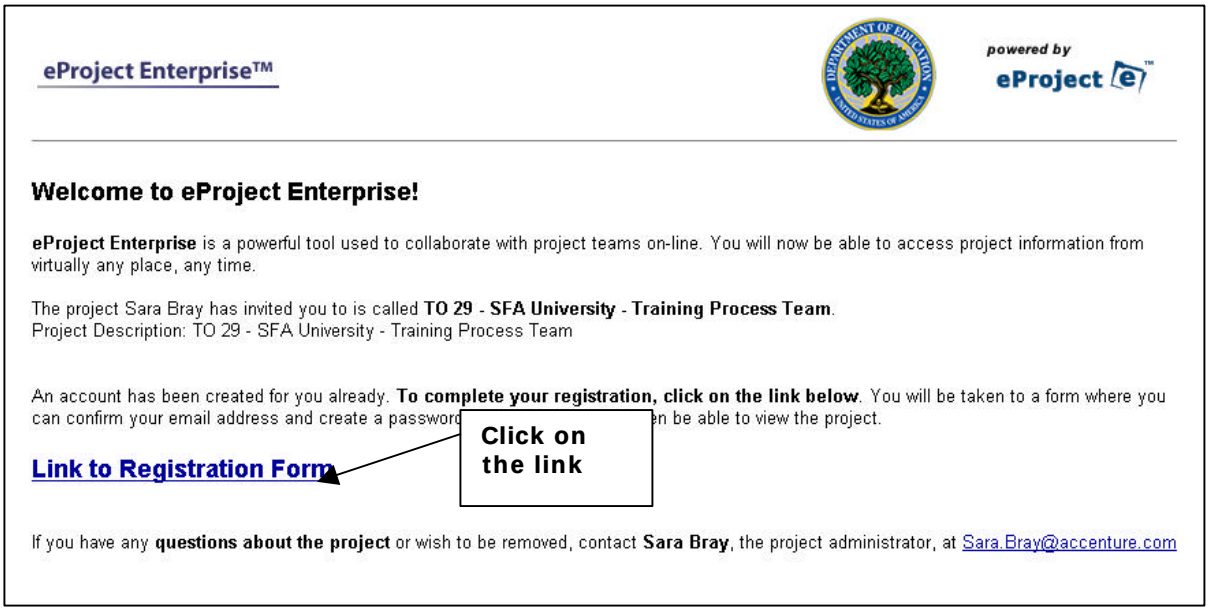
eProject Job Aid

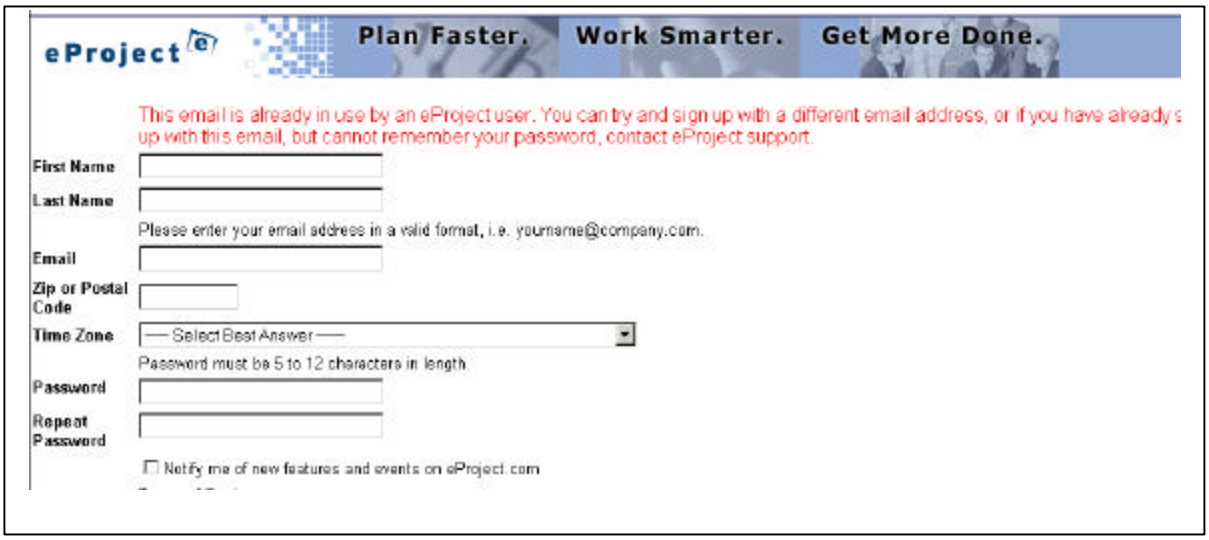
This job aid will demonstrate how to:

- Log into eProject
- Use the calendar
- View a document
- Download and update a document
- Upload a new document into eProject

1. You will receive an invitation to join the eProject titled *TO 29 SFA U Training Process* via e-mail from Sara Bray



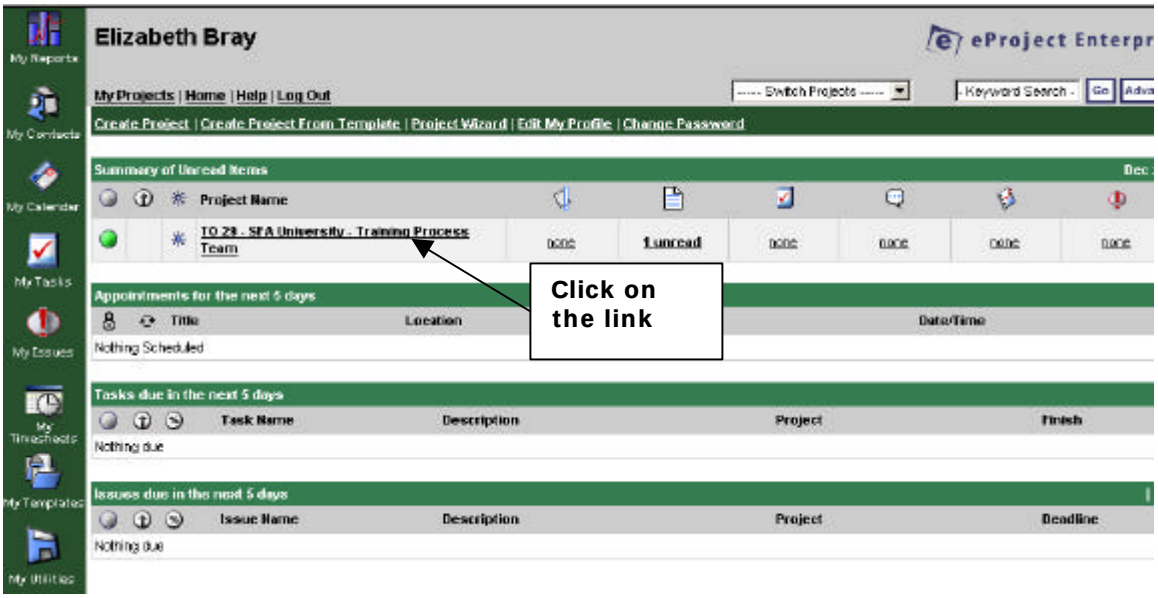
2. Click on **Link to Registration Form**



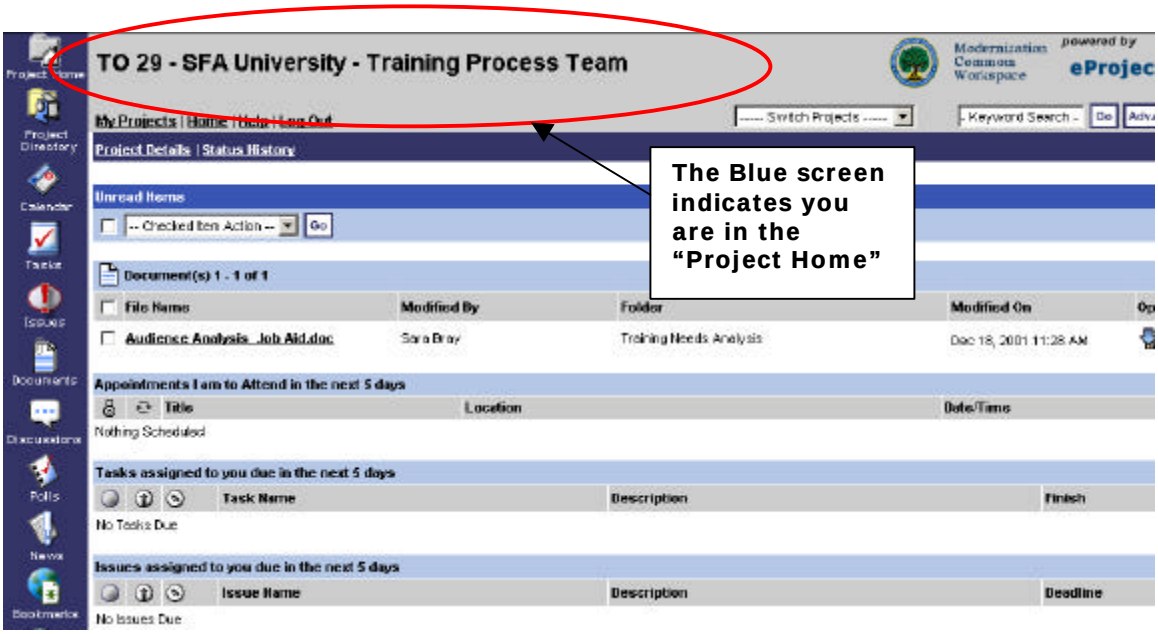
3. Make sure all boxes are populated with your appropriate registration information

- Choose a password that you will be able to remember, this is how you will be logging into the system in the future
- Don't forget to populate the **Time Zone** box

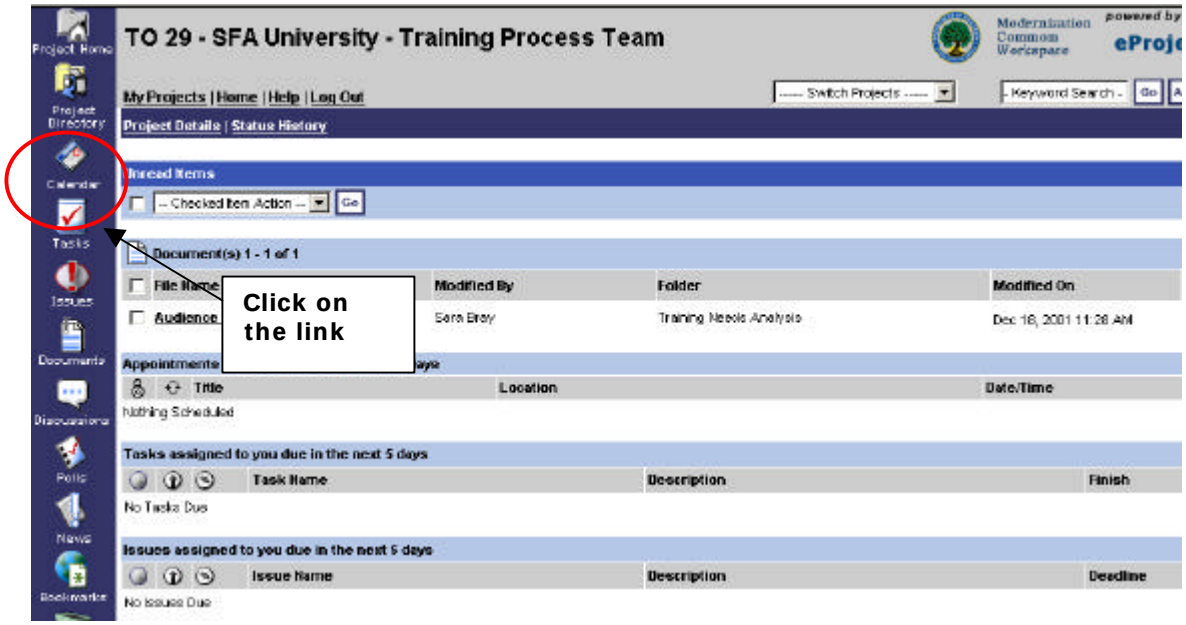
4. You will be taken to the main *Project* view indicated by the green screen



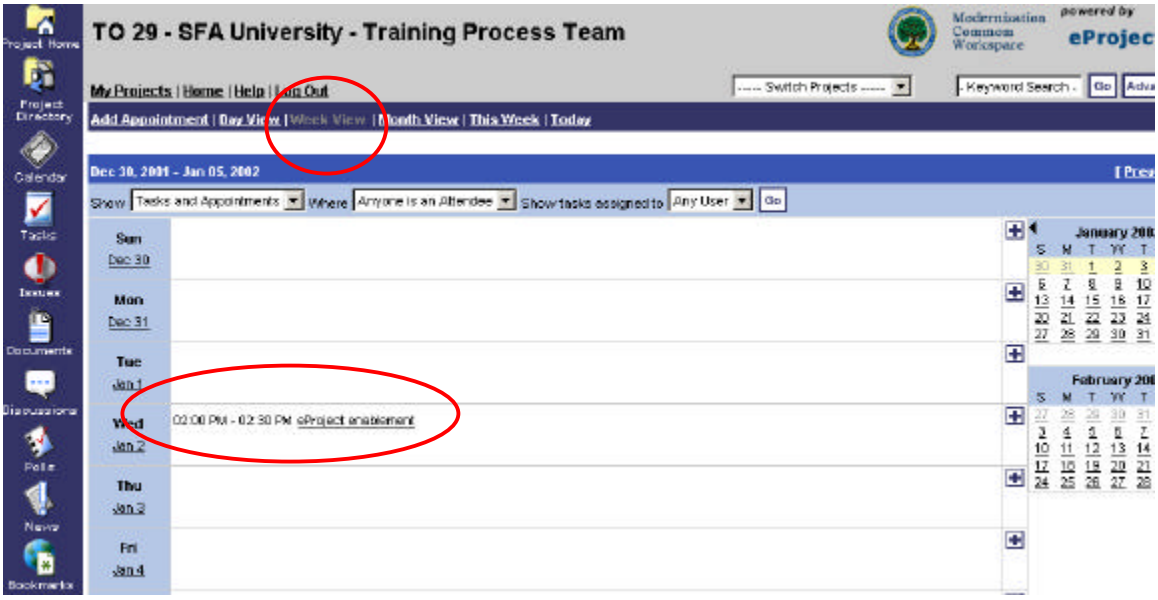
5. Click on the **TO 29 – SFA University Training Process Team Link**
   - You will be taken to the *SFA University Training Process* Project Home Page



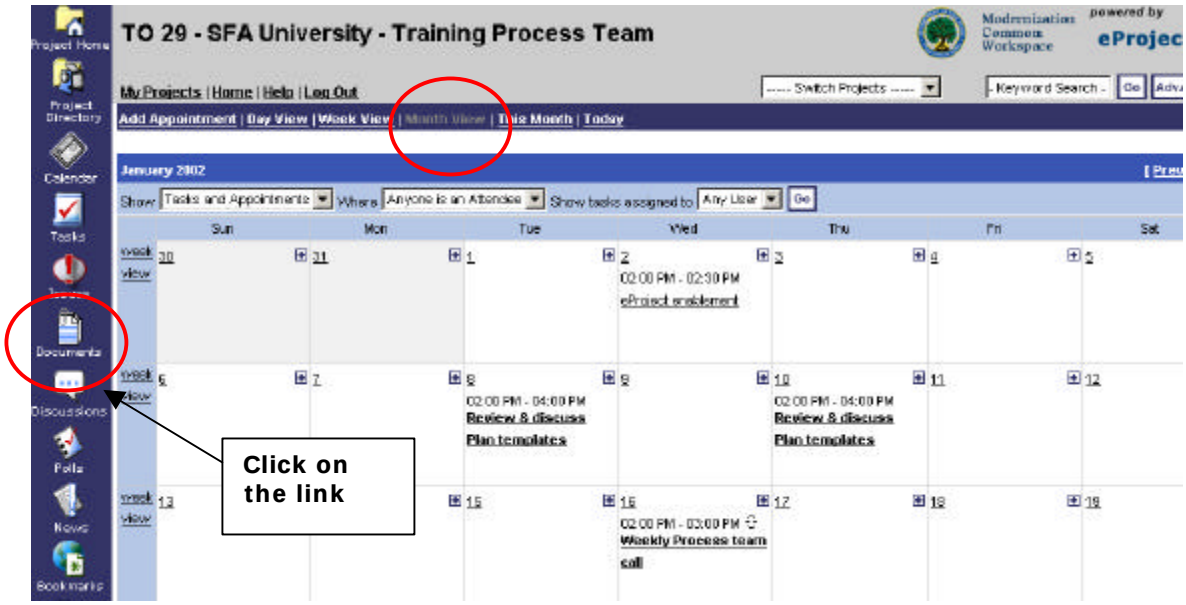
6. Click on the **Calendar** icon on the left task bar.



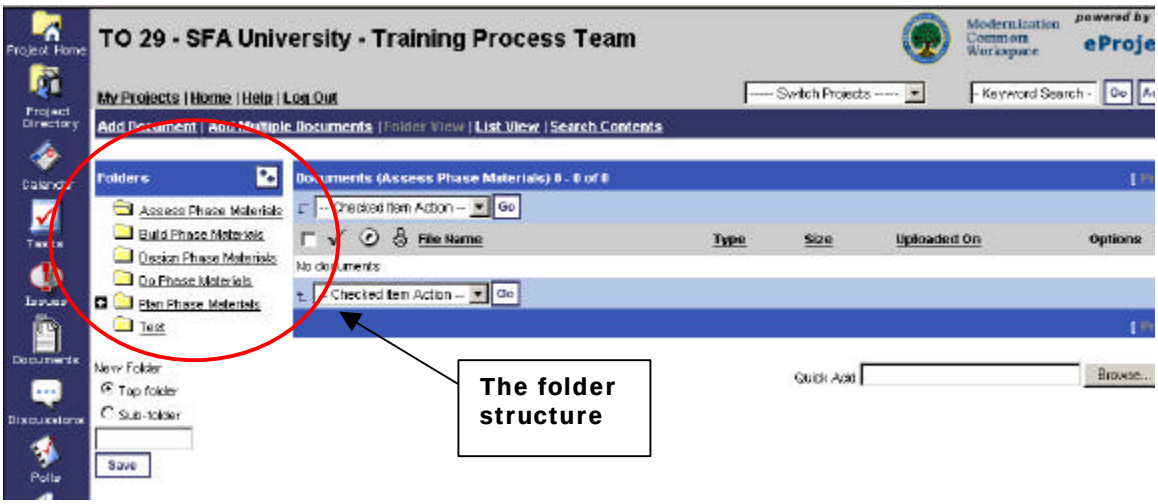
7. You will be taken to the *Calendar Week* view.
   - Note that you will have today's conference call listed as an appointment for today.



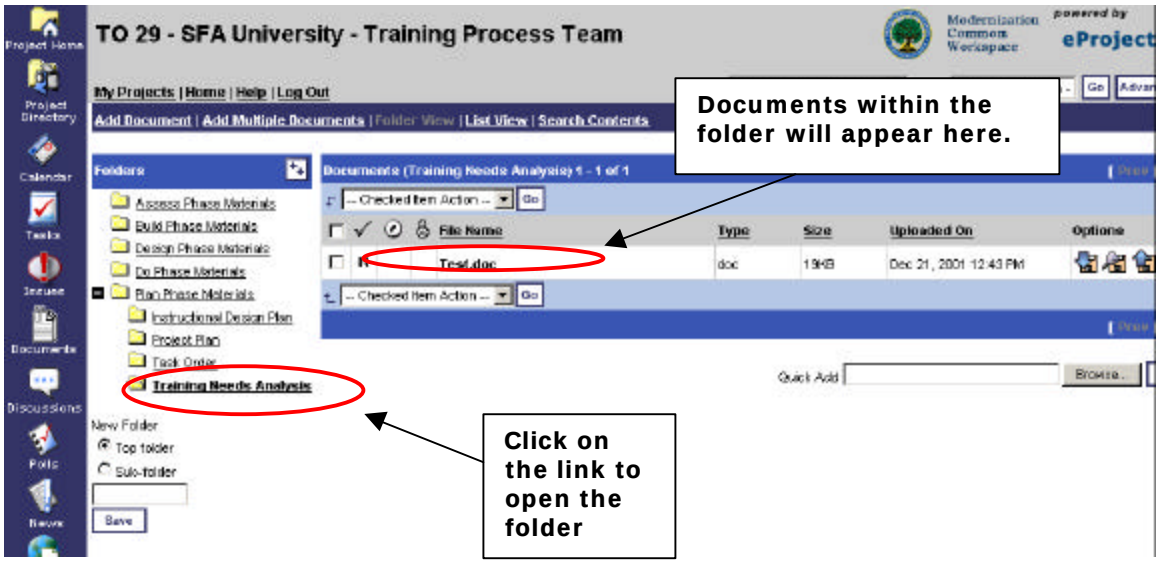
8. You can also use the *Month* view



9. Select the **Documents** icon from the task bar
10. You will be taken to the *Documents* home page
    - Note the folder structure. The "+" sign beside the **Plan Phase Materials** folder indicates that there are documents stored in the folder

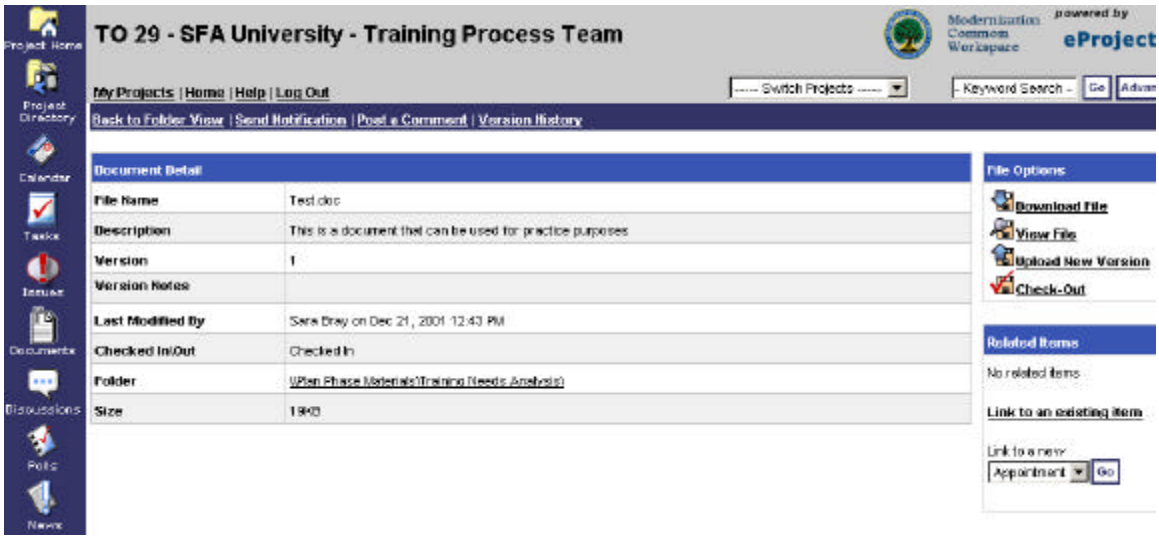


11. Click on the **Plan Phase Materials** folder. The folder will expand to show the sub-folders where the documents are housed
    - *If* the subfolder name is **bold** it indicates there are individual documents within
12. Click on the **Training Needs Analysis** folder



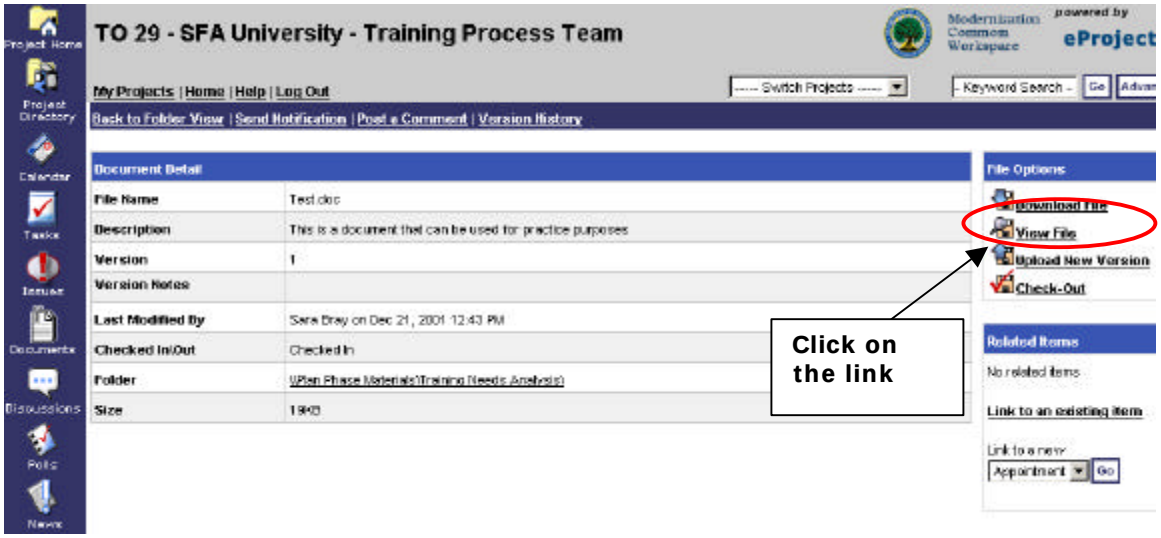
14. Click in the **Test.doc** link
15. The user is taken to the *Document Detail* screen. The user is given four document options:

- Download File
- View File
- Upload New Version
- Check-Out

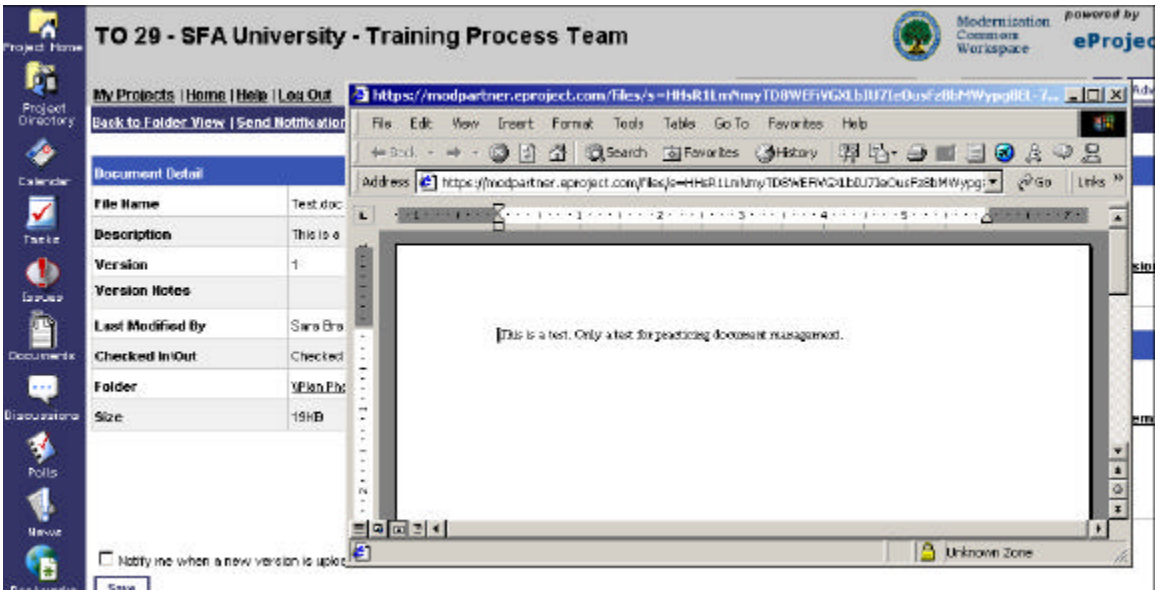


- Team members will use the **View File** option unless a document must be revised or updated.

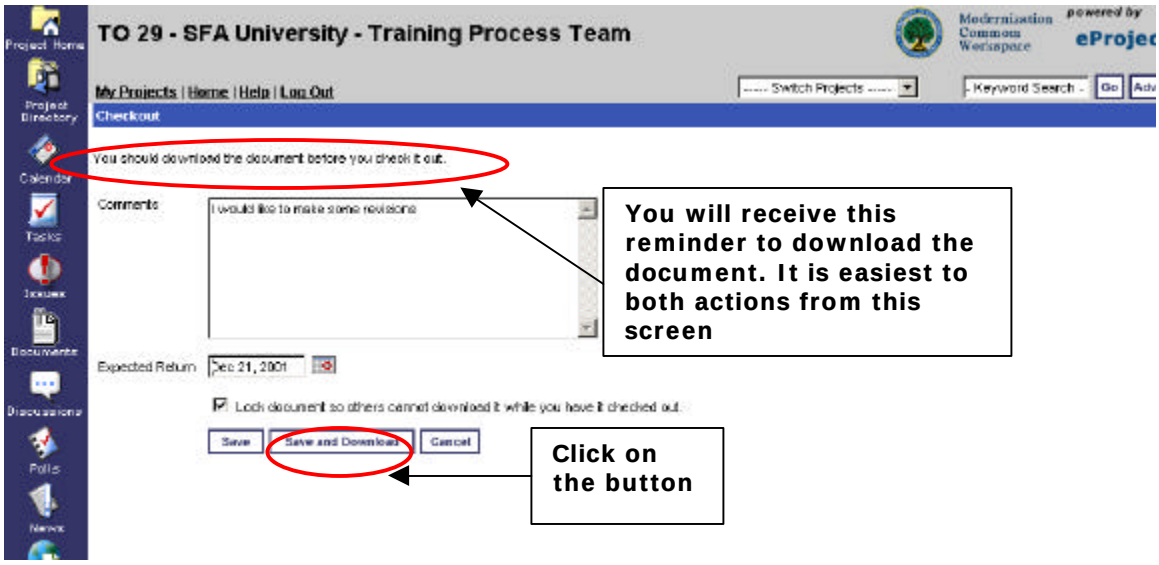
16. Select the **View File** icon



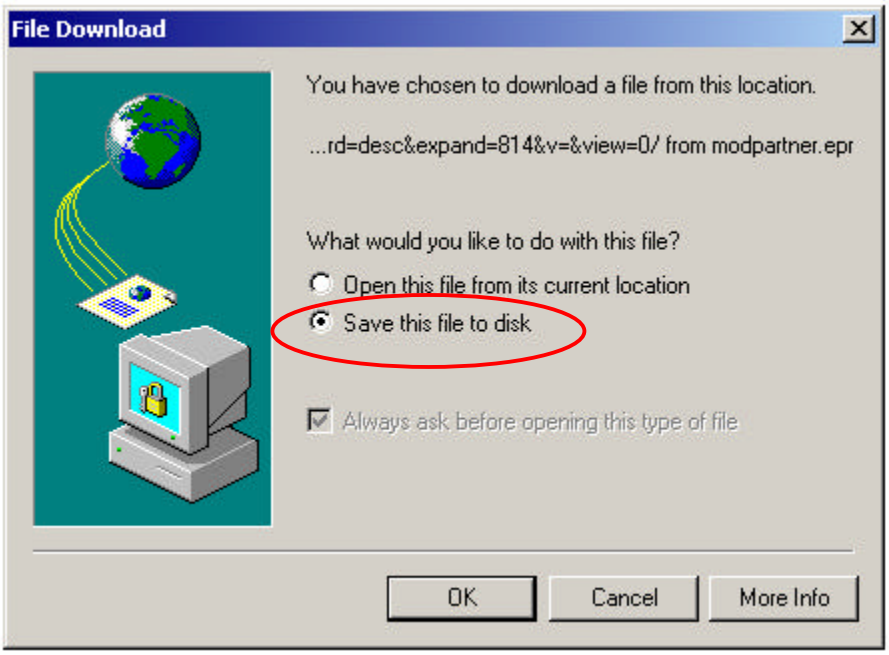
17. The Internet browser will be launched to view the **Test.doc** The user can print and make changes locally, however the changes will not be captured in the eProject repository



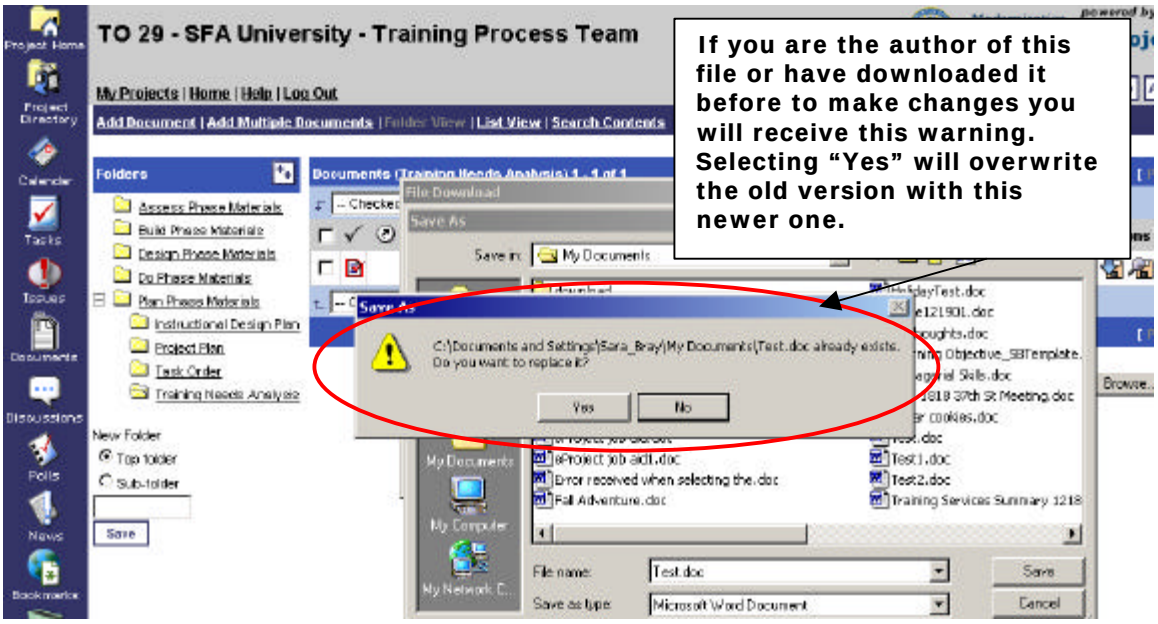
17. To download the **Test.doc** to your computer to make changes or updates, the user must **Check Out** the file so that no one else can make changes and then **Download File** to their hard drive



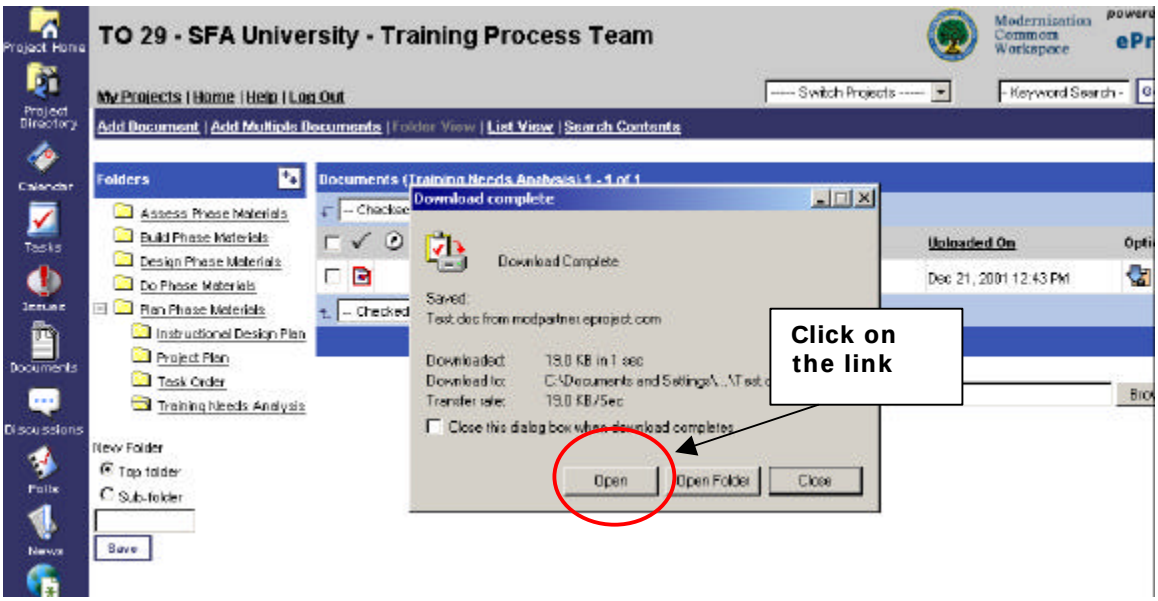
18. Fill out a detailed comment to **Check Out** the document
19. Select an **Expected Return** date from the calendar by clicking on the **Grid** icon to the right of the **Expected Return** field
20. Click on the **Save and Download** button



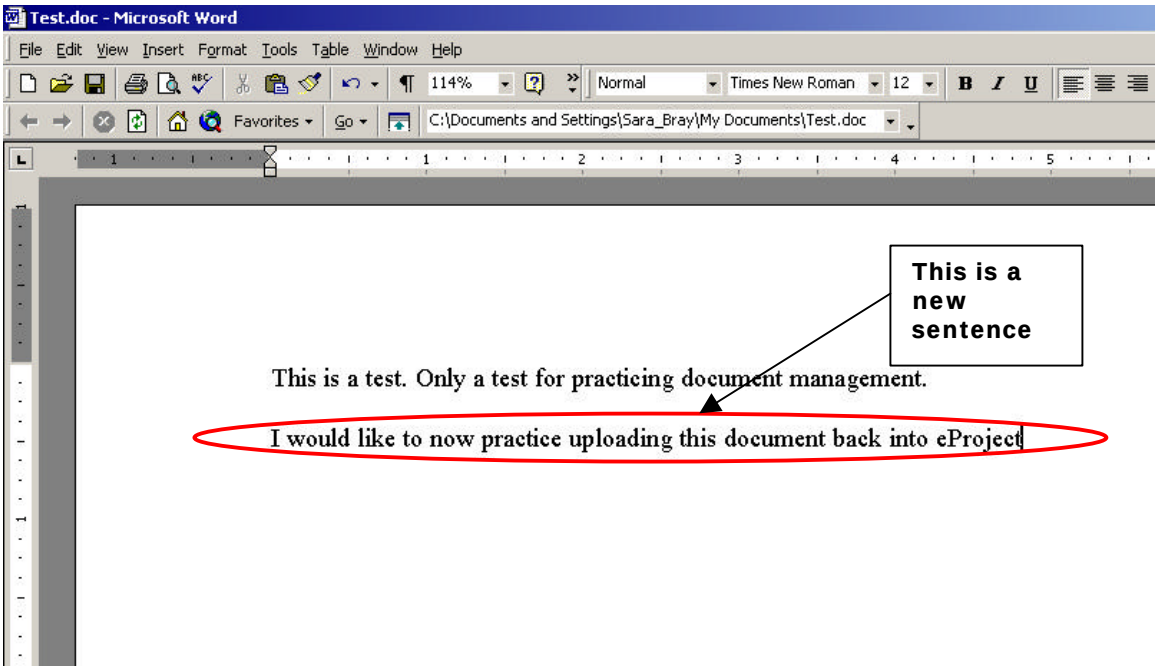
21. Select the **Save this File to Disk** radio button and select the **OK** button
    - Make sure to save it in a place you will remember



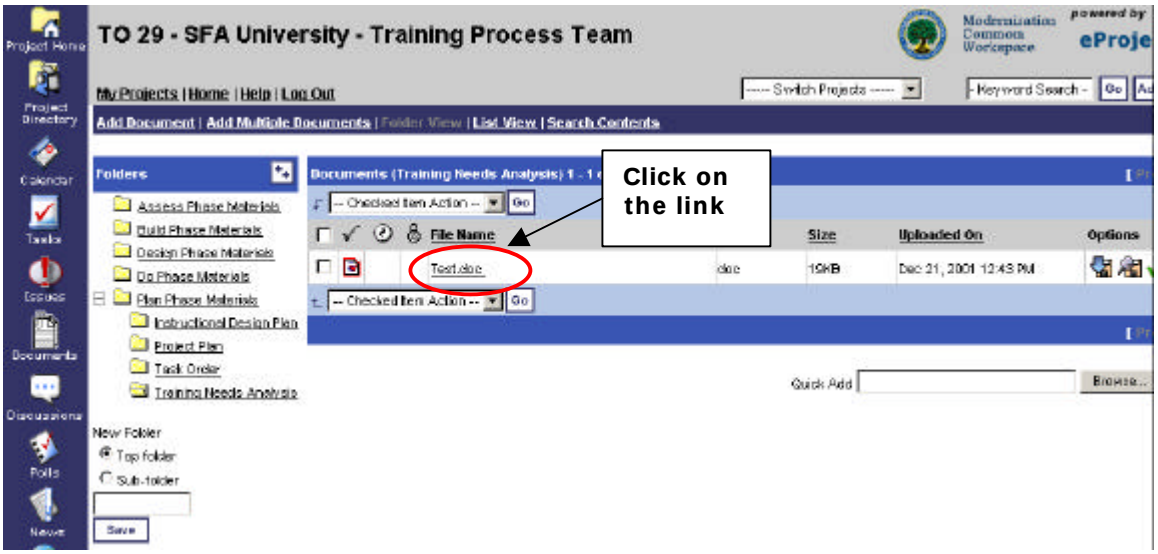
22. Once the download is complete, you can automatically open the document by selecting the **Open** button



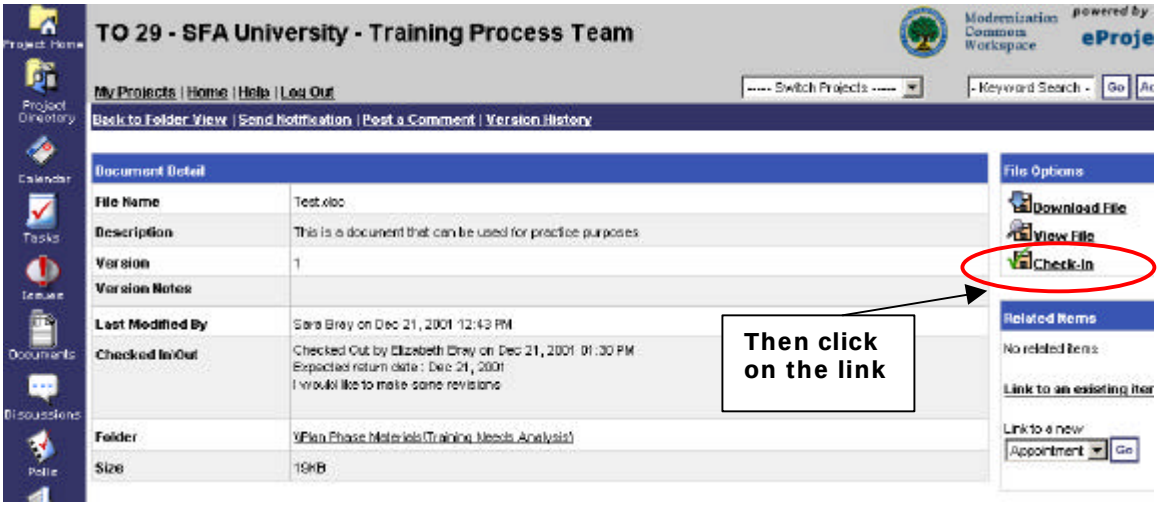
23. You will now be taken to the Microsoft Office application that the document was created in and will be able to make the revision

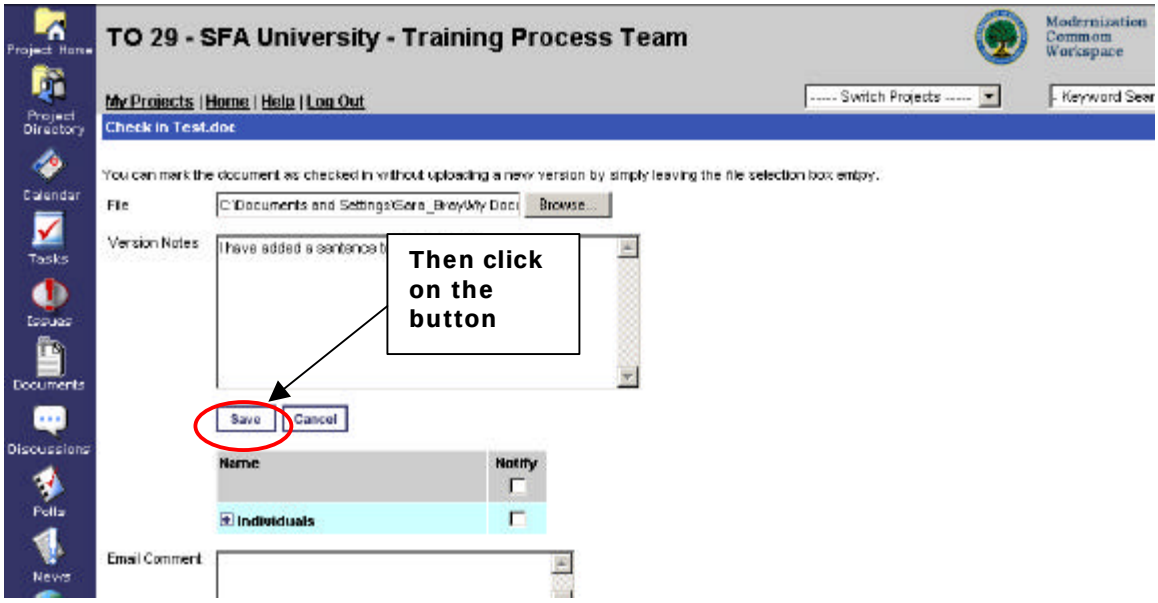


24. When completed making your changes, select the **Save** icon and **Exit** from the program
25. The eProject application should be right behind the document, or minimized on your task bar. You will notice the red **Checked Out** icon to the left of **Test.Doc**
26. Click on the **Test.doc** link

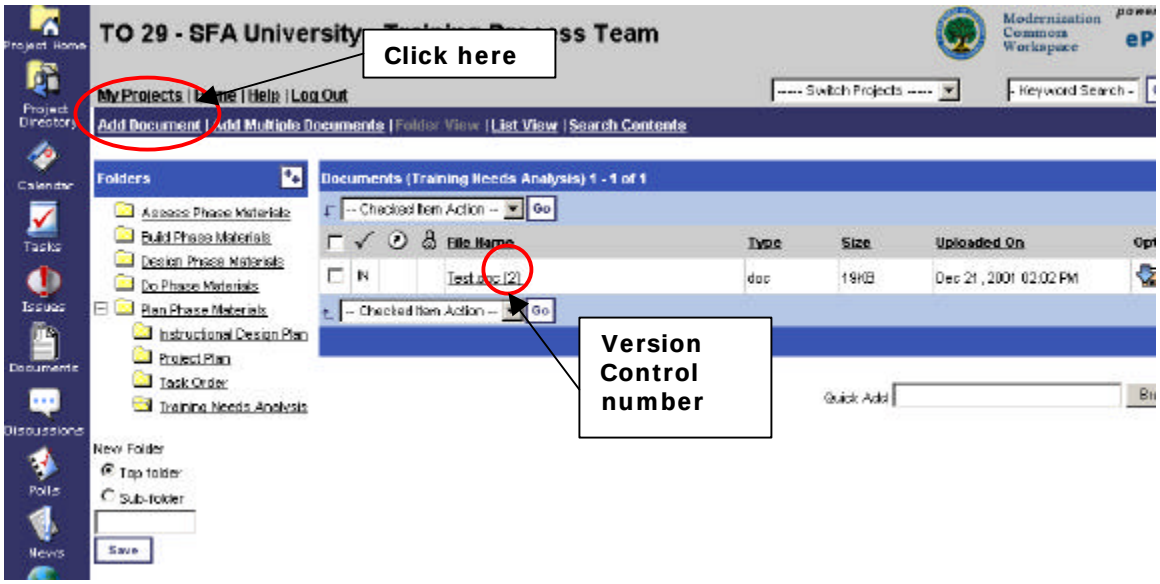


27. Select the **Check In** icon

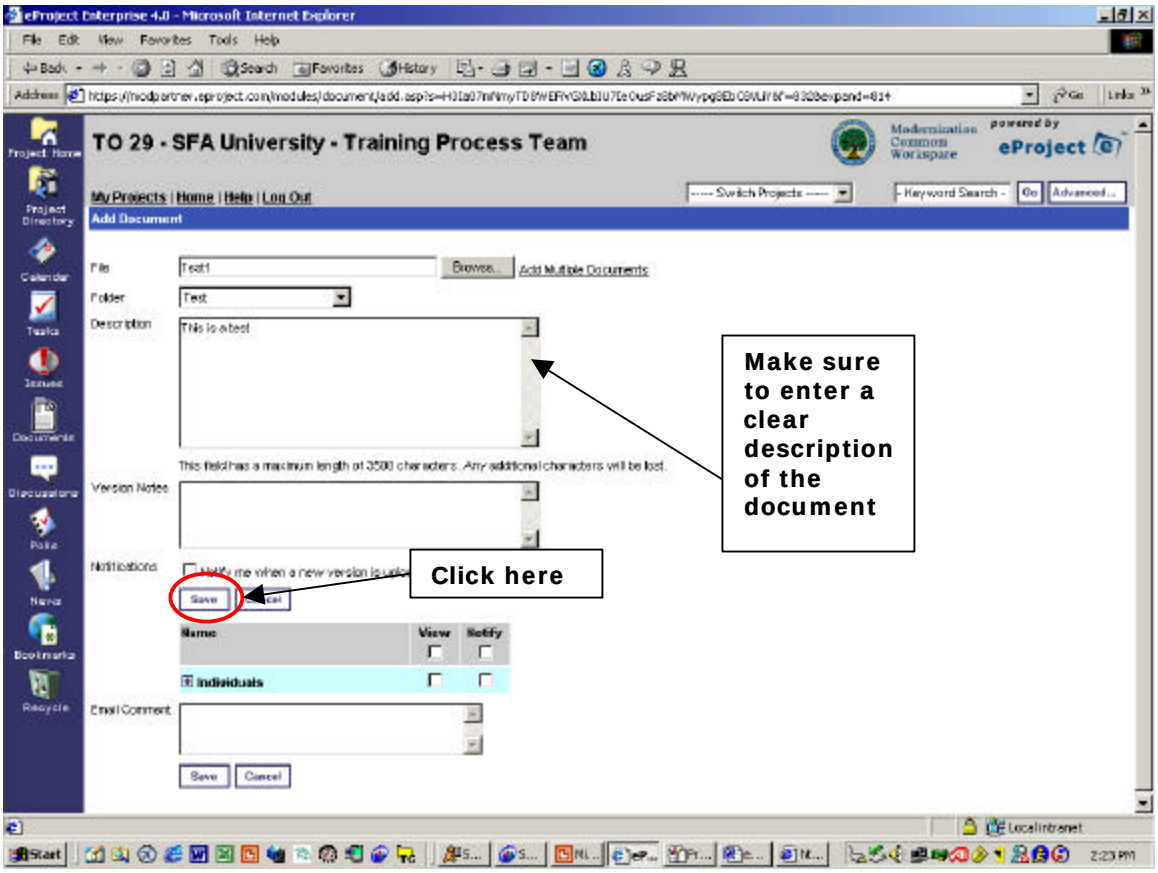


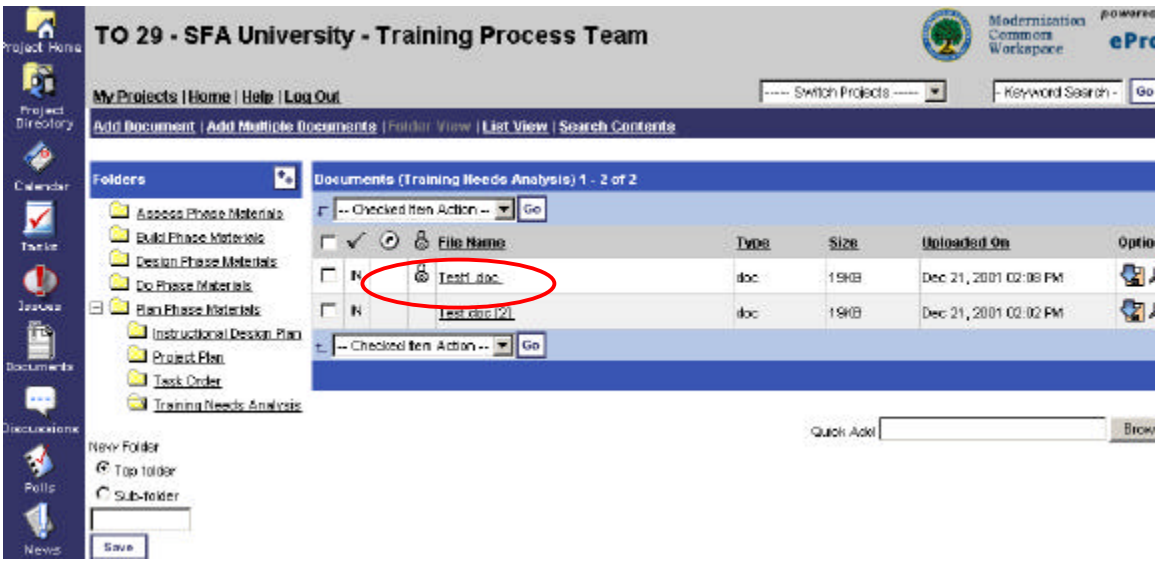


28. Either use the **Browse** button to locate the **Test.doc** on hardrive or type **Test.doc** into the field
29. Add a detailed description in the **Version Notes** fields to indicate the changes made for team reference
30. Select the **Save** button



31. The document will now be **Checked In** and available for other team members to update if applicable
    - Notice the (2) now next to the document name. This number in parenthesis indicates which version the document is in
32. Select the **Add a Document** link





33. The document that you have created will be appear in the documents list