



eRoom 5.0 Upgrade Training *Practice Exercises*

Exercise 1. Getting acquainted with the new interface

- ▲ ▼ ? 📄 1. Use the *Next Unread Item* button to open several items. Then go to the top level of the eRoom and mark all items as Read (you should do it in two clicks).
- ▲ ▼ ? 📄 2. Hover over the eRoom icon in the top left hand corner. This tells you what version of eRoom you're using and if the plug-in is active.
- ▲ ▼ ? 📄 3. Open the My Stuff folder and create a folder with your name on it. Be sure to enter a description.
- ▲ ▼ ? 📄 4. Create a Note entitled "My Favorite Passtime is <name>". Add a brief note about the passtime.
- ▲ ▼ ? 📄 5. Use the Up a Level button to go back to the top level.
- ▲ ▼ ? 📄 6. Expand the My Stuff folder, right click on your folder *icon* and rename it (make something up).
- ▲ ▼ ? 📄 7. Right click on the name of one of the top level folders and open it in a new browser window. Maximize the window and then expand the side panel (map view) by clicking on the resize toggle.
- ▲ ▼ ? 📄 8. Set the folder to display items in the *large icon* view—notice the commands on the folder that disappear. Click the **commands** button on the folder. Is there any difference between this and the *Detail* view? Now close this window.
- ▲ ▼ ? 📄 9. Add a link in the description area of your folder (that you created in My Stuff). Link to one of the top level folders (such as *Board Games*) using the drag and drop method in the rich text editor. (Hint: you must have two browser windows open.) While you're there, try some of the new fonts in the drop-down box.
- ▲ ▼ ? 📄 10. Create a new folder in your existing folder, and assign it a new icon "on the fly" (before finishing). You'll notice that it's very easy to do because you have the entire selection of icons in view on one screen.

- ▲ ▼ ? 📖 11. Set up a Template-Item button and two routing buttons on your original folder (created in My Stuff). Rout items to the folder you created in Step 10.
- ▲ ▼ ? 📖 12. Change the Access Control on your folder to *Everyone who can open the folder*.
- ▲ ▼ ? 📖 13. Import an application file (Word, Excel, etc.) from your desktop to your folder, applying version tracking in the process. select **access control** before finishing to view how the new file inherits the folder default setting you set in Step 12.
- ▲ ▼ ? 📖 14. Create a link object in your folder to one of your favorite web sites (use discretion, please.) Be sure to select the option for launching it in a new window. When done, try it out.
- ▲ ▼ ? 📖 15. Add 2-3 entries to the existing database entitled, Favorites Listing.

Exercise 2. Using Polls and Alerts

- ▲ ▼ ? 📖 1. Go to the Trivia folder and create a trivia poll with 3 questions (and 4-5 possible answers for each). The title of the poll should include your name in it. Show the totals to you and Coordinators only and show the votes cast to anybody who has voted. Do NOT sort totals by number of votes. Include space for comments but not an attachment box.
- ▲ ▼ ? 📖 2. With your poll open, select the Alerts button on the command bar. Use this to let 5-7 others know you have a poll ready for their response. Send the message in the form of an instant message. If it's not available for the certain users, send an e-mail message instead.
- ▲ ▼ ? 📖 3. Respond to any instant messages you get by completing the other trivia polls in the folder, up to three.
- ▲ ▼ ? 📖 4. Go back and edit your poll by adding a new question. Change the display settings to allow Everybody to see the totals. Read the options for alerting members and choose one.

Exercise 3. Using the Calendar item

- ▲ ▼ ? 📖 1. Enter three different events in the calendar. You decide what name to give each one (if you need ideas, read the calendar description). Follow the criteria below for entering each event. Where no criteria is given, you make it up.
 - **Event 1.** Single occurrence event, All members in the eRoom participate

- **Event 2.** Repeating event from 8:00am to Noon, occurring one day a week for 8 weeks, participating members are you and five other members
- **Event 3.** Repeating event in the evening, occurring on the same day during the same week each month (for example, the 3rd Tuesday), participating members are you and three other members

- ▲ ▼ ? 📅 2. Go back and delete one of the events from Event 2 (not the whole series).
- ▲ ▼ ? 📅 3. Try the different calendar views as well as the **mine** and **all** buttons.

Exercise 4. Creating a New eRoom

- ▲ ▼ ? 📅 1. In the main facility create a new eRoom with your name in the title. This lets you walk through the new create wizard. Add at least 10 users to your eRoom and 5 coordinators.
- ▲ ▼ ? 📅 2. After the eRoom is created, select 3 members to be the *Points of Contact*.
- ▲ ▼ ? 📅 3. Set the project status of the eRoom (Red, Green, or Yellow) and enter a brief text status report.
- ▲ ▼ ? 📅 4. Go to the members section of your eRoom and create a new role and three members to that role.
- ▲ ▼ ? 📅 5. Add a couple folders to the top level and add at least one file to one of the folders.

Exercise 5. Creating a database item

- ▲ ▼ ? 📅 1. Create a database item in your eRoom according to the specs below.
 - This will be a custom Issues database, so use the Blank database option, not the default Issues one.
 - You want columns for the following: Date Submitted, Submitted By, Issue Title, Assigned To, Due Date, Status, Approval, Change Log, Comment area, and Attachment box.
 - The Status field should be a traffic light, all other fields should be self-explanatory for the type of data format.

- ▲ ▼ ? 📖 2. Continue through the different database options. They should be self-explanatory.
- ▲ ▼ ? 📖 3. When done, make up 5-6 entries for the database.
- ▲ ▼ ? 📖 4. Try searching for items in the database and sorting or grouping in different orders.

Exercise 6. Setting up My eRooms and working offline

- ▲ ▼ ? 📖 1. From the eRoom monitor, launch My eRooms.
- ▲ ▼ ? 📖 2. Change the settings so that all eRooms are displayed in a block format (3 across) with logo, project status, and full status report showing.
- ▲ ▼ ? 📖 3. While you have the Settings box open, switch to each of the Outlook tabs to see where items are synchronized.

Exercise 7. Working Offline (Advanced)

Note: This exercise has not been tested. Proceed with caution!

- ▲ ▼ ? 📖 1. Open the eRoom you created to the top level. Go to Internet Explorer and select Add to Favorites and check Make Available Offline. You will be prompted in a wizard for several settings, which should be evident. If asked, include subfolders.
- ▲ ▼ ? 📖 2. When done, go to the IE File menu and select Work Offline.
- ▲ ▼ ? 📖 3. Open the eRoom you saved offline and open the file you added. Change the file and save it. Close the window and all other instances of the browser.
- ▲ ▼ ? 📖 4. Reopen the browser and remove the check from the Work Offline option. Access the “online eRoom” and see what happens.