

eRoom® 5.0

Reviewer's Guide



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eRoom 5.0 Reviewer's Guide

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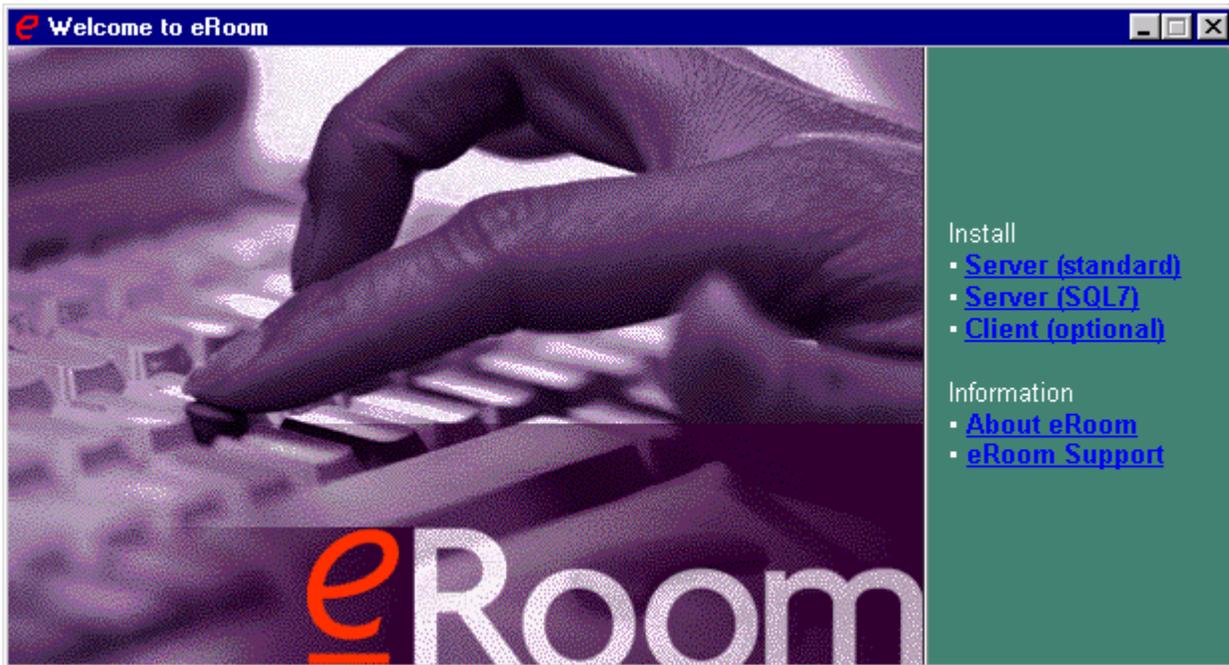
Important Note to Reviewers

Thank you for reviewing eRoom 5.0 from eRoom Technology, Inc. Your interest in our company and products is greatly appreciated.

The eRoom 5.0 Reviewer's Guide is designed to give you an overview of eRoom, its target market, and market positioning. If you are already familiar with eRoom, you will find the "What's New in eRoom 5.0" section very useful. If you are not familiar with eRoom, we have provided a "Using eRoom" section that provides an overview of eRoom and its basic features and functionality. In addition, you'll find the "Practice Exercises" section on page 13 helpful for practicing using specific features of eRoom 5.0.

Installing from the CD

When you insert the eRoom 5.0 CD in your drive, it will auto run the install program and display the following screen:



The **Server (standard)** selection will install eRoom with an embedded SQL database for storage. This comes free of charge with the product and will not require any special configuration or installation. The **Server (SQL7)** option requires that you have a licensed version of Microsoft SQL7 software available. These options are provided primarily as a matter of convenience – both provide the same features.

Server Administration

Once you have installed the software, you can manage the server from any location using the eRoom Server Settings page. You can get to the Server Settings page in one of two ways:

- Enter in your browser the URL: *your_servername.com/eRoomServerSettings*
- Use the Microsoft Management Console ([MMC](#)) by choosing from the Start menu: Programs > eRoom Administration > eRoom Server Administration

The help system will provide you with ample information on how to create facilities, eRooms, members, and other areas that you will need when reviewing the aspects of eRoom server administration.

Creating Your first eRoom

During installation, you create your first facility and an account for yourself as the facility administrator. An eRoom *server* can contain any number of eRoom facilities. A facility is an independent set of eRooms. Each facility has its own administrator, licenses, and list of members. Your first facility will automatically contain the following set of sample eRooms, which you can use as a starting point to explore typical applications:

- Client Engagement (Managing the client-consultant relationship)
- New Product Concept (Developing a new product concept)
- New Product Launch (Managing the launch of a new product)
- New Product Development (Managing the development of a new product)
- Proposal Development (Managing the client-customer relationship)

- Customer User Group (Facilitating end user collaboration)

You can also create a new “blank” eRoom where you can add the eRoom structure yourself.

If you have any questions or comments, please contact us and we will respond to your inquiries promptly. eRoom Technology considers your feedback a vital ingredient to the success of this product and to improving our future products.

Market Positioning

Fast-paced, rapidly changing global competition requires companies to collaborate on business processes within their organizations and with their customers, suppliers, and other business partners, wherever they are located. These business processes have become increasingly varied, complex, and difficult to manage. This is due, in part, to the increased pace of global competition, increased outsourcing, rapidly changing customer requirements, heightened demand for more highly-customized products, and significantly shortened product life cycles.

These business processes require a broad range of collaborative activities among the members of the extended enterprise seeking to achieve their business objectives. As companies increasingly use outside parties to perform services for them, they seek an efficient way to support the collaboration necessary to manage business processes among the members of the extended enterprise. The challenge is getting tougher as companies try to get more work done faster and as teams become more dispersed.

The eRoom digital workplace is designed with this kind of work in mind. Over 450 enterprise companies like Ford Motor Company, HP, Arthur Andersen, 3Com, A.T. Kearney, Cisco, EDS, and others, are using an eRoom workplace for the collaborative aspects of developing and bringing new products and services to market.

The newest version, eRoom 5.0, contains dramatic feature improvements and enhancements, making it our most significant product release since version 1.0. We’ve re-engineered portions of eRoom to meet the needs of our enterprise customers, addressing customer requests for handling more project process and details, and including a host of other upgrades that make eRoom 5.0 one of the most complete collaborative tools available on the market today.

Competition

Many companies promote collaboration as part of their product but very few, if any, offer a true cross-enterprise digital workplace. The eRoom digital workplace is designed for cross-enterprise teams who need to work together on the collaborative aspects of designing and delivering products and services and for teams who work together.

eRoom is most commonly compared to Lotus QuickPlace. While there are some similarities, eRoom offers the flexibility and extensibility to enable people to create their own workplace structure, organization, and scales well for large amounts of project content. QuickPlace is useful for small groups of individuals, but does not provide the suite of tools and flexibility needed by productivity-minded teams within or outside of the typical extended enterprise.

In addition to products that fall within the general competitive landscape, products called Professional Service Applications (PSA) are most commonly compared to eRoom. These applications tend to focus on the structured aspects of client engagement, like tracking billing hours or time on a project, but are typically weak when it comes to the collaborative aspects of client engagement. Customers typically find a non-collaborative environment to be unproductive, so they prefer to use an eRoom digital workplace to establish a project methodology and project procedures (like tracking project issues) to share and finalize documents, and for all the

unexpected, unstructured interactions that take place. An example of a competitor in this area would be ChangePoint.

The strengths of eRoom are also frequently leveraged when cross-enterprise teams need to work together on the collaborative aspects of a new product design (NPD) and on the process management of a supply chain. Using eRoom as the digital workplace is useful during the entire product lifecycle (beyond product definition). eRoom's strengths in regard to issue-resolution, decision-making, and other functions where "business gets done" in the NPD process make it a natural for cross-functional collaboration. One example of a competitor to eRoom in the NPD area would be NexPrise ipTeam. Products like this offer little collaboration, resulting in increased development time. eRoom takes New Product Design to the next level by allowing true collaboration throughout the entire lifecycle of the product.

Why an eRoom digital workplace?

Because our digital workplace is....

Cross-enterprise - Connecting you easily with your team members both inside and outside your corporate firewall.

Comprehensible - Easy to set up and easy to use. eRoom is intuitive. It makes users instant experts.

Complete - Equipped with all the tools you need to get the job done without having to go offline. And, to get you started, it offers ePractices, an ever-expanding set of industry-specific templates and applications, designed to help you mobilize business projects faster.

Customizable - Structured or unstructured to manage anything from a complex supply chain to a free-flow brainstorming session. You create your eRoom to fit your workflow. And, eRoom comes the way you want it - as software that you install yourself, as a hosted application, or as an integrated part of the portal you offer your customers.

Connected - Integrating with all the tools that you're already using, from Microsoft Office on your desktop to the eBusiness applications that extend across your enterprise.

Contagious - Spreading quickly to all members of the organization. When individuals can do more in less time, they're empowered and more productive.

What is eRoom?

The eRoom digital workplace enables cross-enterprise business collaboration that is essential in designing, delivering, and managing products and professional services. eRoom is a secure, shared Web-based workplace and set of flexible project collaboration tools. You use a Web browser to work in the eRoom and navigate through the same way you would navigate a Web site.

Hundreds of companies use an eRoom digital workplace as a way to work across their enterprise and with partners, suppliers, and customers in key aspects of their business. Our customers use eRoom workplaces to:

- Collaborate across multiple departments to develop and deliver products to market quicker
- Coordinate with suppliers and customers to streamline a supply chain system, resulting in cost efficiencies and smoother production cycles
- Work closely with clients on client engagement and service delivery, resulting in enhanced and richer client relationships
- And to collaborate productively on projects of every type, from highly structured, deadline-driven tasks to more creative, open-ended interactions

The eRoom digital workplace is where the project work happens — an online place where people share ideas, establish procedures, review and discuss documents and deliverables, resolve issues, make decisions, and get work done.

End-users can quickly tailor an eRoom workplace to their business initiative or project and their team's processes and work style. The team starts realizing benefits right away because:

eRoom is easy to use

- Using eRoom is as easy as using a Web page. It requires no training and makes it simple for new users to learn their way around their digital workplace. It's also easy to invite new members from external partner companies.
- People like using it, so the adoption is fast, making it easy to get an entire team to start using it for all of their projects.
- This all means that eRoom starts delivering valuable results right away.

eRoom is a complete project collaboration solution

- You'll find a flexible environment with all the tools you need to create a custom workplace for your specific project.

eRoom is built for networked, enterprise-scale business

- This means that teams of people across a company, in different locations, and from different companies can work as if they are in the same place.
- eRoom can be customized, extended, and integrated with enterprise systems and applications.

Using eRoom (for reviewers new to eRoom)

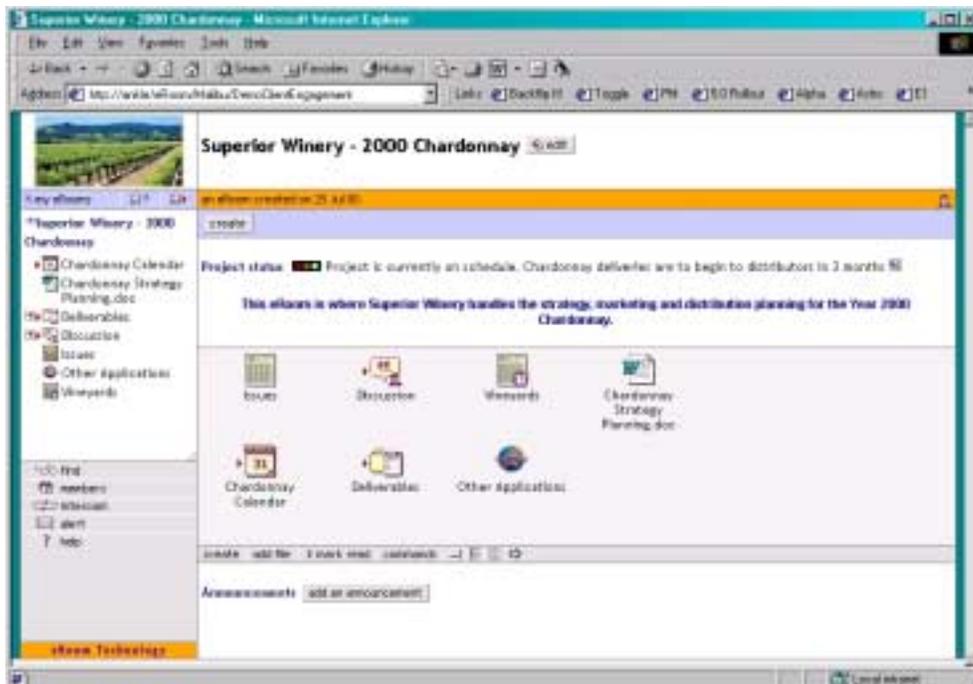
eRoom works with just your Web browser.

When you login to eRoom, you have the opportunity to choose between using the browser alone for access to eRoom or to augment your client experience by installing the eRoom plug-in software. The interface to the eRoom remains the same no matter which option you pick.

The plug-in is available for those users running Microsoft® Windows® software. This plug-in provides some features that are otherwise not available within a browser. When you choose to install the plug-in, you get the following additional functionality:

- The ability to drag and drop items between your Windows Desktop and your browser
- One-click file editing with automatic uploading when you're done
- Offline editing of eRoom files
- Rich text editing in eRoom's editor, including a spell checker
- My eRooms page for simple access to your most frequently used eRooms
- Outlook Synchronizer for synching eRoom Calendar events and Task Lists over to Outlook
- Ability to receive eRoom instant messages so that others can ask you to immediately join them in an eRoom
- Files you have reserved for later editing are copied to the Files for Offline Editing directory

When you enter the eRoom, you'll see a front page like the one shown here:



- The Navigation Panel on the left side of the eRoom is designed to help you navigate to any place in the eRoom quickly. At the top, it contains three icons: **my eRooms** takes you to a personal Web page displaying your

most commonly used eRooms,  takes you up one level in the eRoom, and  takes you to the next unread item.

- Below these icons is the Title of the eRoom. Each item in the navigation panel is a clickable link that will take you directly to that area. Areas of the eRoom with more content beneath them can be expanded or collapsed and will have a + or – icon next to them to allow you to see the information.
- Each icon can also be selected with the right-mouse button to show a list of options.
- Below the eRoom navigation panel, there are five other command icons that are available at all times.
 - The **Find** button allows you to search the contents of the eRoom for items containing specific text.
 - The **Members** button takes you to a listing of current eRoom members. This is where you can add, modify, or delete members from the eRoom when necessary. You can also view additional member details here.
 - The **Intercom** button lets you chat with others currently working in the eRoom and summon members not currently working in the eRoom to join the conversation.
 - The **Alert** button lets you send an immediate e-mail or eRoom instant message to members of the eRoom inviting them to join you in the eRoom or look at a specific item you added or modified. *Note: See Exercise 2 in Practice Exercises*
 - The **Help** button takes you into the online help system.

Inviting Members

It is easy for project team members to invite other team members into the eRoom. On the eRoom Navigation Panel, simply click on the “Members” button to see the eRoom member dialog. When you add new members, you define their level of participation: Participant, Observer, or Coordinator. To add a new member, click on the “Add” button. Once you have added a person’s name to the member list, you can send that person an invitation to join the eRoom by highlighting their name and clicking the “Invite” button. An email message with the eRoom URL and login name is automatically sent. If the new member has not installed the eRoom client plug-in software before, then he will be given the option to do so at that time and led through the installation process.

Creating New Items

In addition to dragging files from your desktop or hard drive and dropping them where you want them in an eRoom, you can also create a number of items in an eRoom: folders, discussions, notes, polls, calendars, databases, inboxes, other files, and links. Click on the “Create” button and eRoom guides you through the process.



- **Folders:** A Folder is an eRoom page that contains other items. Suppose that you and your team are using eRoom to manage a client engagement. You could develop one folder for Budgets, one folder for Research, etc.
- **Discussions:** This is an ideal way for members to exchange ideas about a subject, over time. Discussions can contain both multiple topics and multiple threads. Discussions can also contain attachments (files, links, etc.) to bring context to your content. To facilitate a decision you can also embed a Poll in the discussion.

- **Note:** A note is an eRoom page that lets you share information without requiring members to have a particular application to see or edit the page. For example, you may want to share with team members a Project Mission Statement. Notes can be created using the eRoom editor, including space for comments, attachments, and polls.
 - **Poll:** Polls help you bring closure to discussions. Imagine if your team needs to quickly decide upon a recommended vendor. eRoom allows you to pose questions with up to eight choices, plus write-in votes. Voting can be named or anonymous. Polls can be either stand-alone or embedded within discussions.
Note: See Exercise 2 in Practice Exercises
 - **Calendar:** A team calendar, with month, week and list views, recurring events, and synchronization to Outlook. Team milestones, group events, and other pertinent date-important project events can be posted here. *Note: See Exercise 3 in Practice Exercises*
 - **Database:** A fully customizable user-defined database for milestones, issues, contacts or other structured project information. You can choose fields and data types, and add, sort, group, search and filter entries. Each entry can have comments and attachments, like any other eRoom page. *Note: See Exercise 5 in Practice Exercises*
 - **Inboxes:** You can create a special inbox folder to receive and store email. This is very useful for receiving email from people outside of your project team or your organization. Or you can create an archive of a project's correspondence. Individual eRooms can have any number of inboxes. In order to receive email, each eRoom facility must have an email account on a POP3 server.
 - **Other File:** While the easiest way to get an existing file into eRoom is to drag it in from your desktop, you can also add files to your eRoom from the "Create" menu.
 - **Link:** You can create a link to anything that has its own URL, including other eRooms or eRoom pages. Perhaps you and your team are working for a client in the healthcare industry. You might want to create links to other Web sites, and perhaps relevant eRooms from previous projects for background material.
-

Routing Items

When you create a folder, you can choose routing buttons to move items to other folders at a particular time or milestone in your schedule. Imagine that you have a project plan that needs approval. You could create a folder with a routing button labeled "Approved" that routes the document to a folder called "Final Project Plan." By simply clicking on the "Approved" button the file is moved to the new folder.

Using the Intercom

When working in an eRoom, you may find the need to get a quick answer or "talk" with another member about a document or topic in real time. At any time you can use the Intercom to either chat with members already present in the eRoom, or you can "alert" any member to join you in the eRoom for a chat. When other members are using the Intercom, you will see a "red light" icon next to the Intercom button in the navigation panel letting you know there is a conversation taking place.

Version Control

You may want to have your team members participate in the creation of a document – such as a proposal. Once you have shared a file with your team members, you can activate eRoom's Version Tracking feature by simply highlighting the file icon and using the right mouse button to select "Track Versions." eRoom will save the file

each time it is uploaded with a new title and any notes about the changes you make. To see the version history for a file, right-click on the file icon and select “Show Versions.”

Keeping Track of New Information

You will probably want to know when your team members have either added new items or modified an existing item, but you don’t want to have to search for these changes. eRoom places an unread mark on new or changed items. You can search for unread marks by clicking on the “Next Unread” button -  - in the eRoom navigation panel. In addition, the eRoom Monitor can send change reports by email. You are notified about new information without having to enter an eRoom. Simply click on the link to the new information, and you can jump directly to the item.

You can also choose to be immediately notified of changes to an item in an eRoom. Right-mouse click on the item’s icon and choose “Notification.” Choose “Yes” in the notification options dialog for immediate notification by email.

Search across eRooms

You may have a new team member joining, or you want to develop best practices based upon a recently completed project. eRoom lets you search for specific text, for items created on a certain date, or for items created by particular members. eRoom conducts a full text search, across all eRoom pages and other file types. You can also search for information across all eRooms in the facility to which you belong.

ePractices

ePractice Samples

There are six sample eRooms that ship with eRoom 5.0. These sample eRooms are designed to display some of the common uses of eRoom as well as the new features of eRoom 5.0. Within the sample eRooms are database items that are based upon a new list of database templates. This list of database templates can be extended and modified depending upon the needs of an organization.

Co-Branded ePractices

Along with the sample ePractice eRooms, Co-Branded ePractices have also been developed. Co-Branded ePractices are available for download from www.eroom.com and are being continuously developed. This type of ePractice is designed to demonstrate how eRoom is integrated to support and facilitate specific vertical market business applications.

Other eRoom functionality

Cross Platform Access: The eRoom solution runs on virtually all client operating systems, allowing team members with different computer configurations to participate in eRoom projects. Users can access an eRoom using just a browser which involves no client software installation, or with a browser plus plug-in which provides a more enriched user experience for Windows users. This type of ubiquitous access allows teams to draw on the expertise of more members across their projects.

Office 2000 Integration: To enhance the user experience for Office 2000 users, the two products are tightly integrated. Office files can be accessed and saved directly to an eRoom, allowing the user to stay within the Office product while completing their work. Users can launch an eRoom from Outlook, using Outlook as a “project

central,” a personal dashboard for tracking mail, tasks, contacts, and project eRooms. Outlook tasks can also be synchronized with eRoom tasks to keep work up to date.

Enterprise Directory Support: The eRoom product provides the ability to select users from a variety of different directory sources, including LDAP, Active Directory, and NT Domains. The eRoom solution lets administrators pick and choose users from multiple directories at the same time, providing maximum flexibility.

Connecting to External Repositories: The eRoom product’s enterprise connectors move information from eRooms to other enterprise repositories such as document management systems, groupware, and Web servers, enabling teams to archive important interim or final project information for future retrieval. The eRoom product offers users the option to tag documents placed in the repository. There is a connector available to MS Exchange Public Folders. In addition, a connector for Lotus Notes/Domino and Documentum EDMS 98 is available.

Web-Enabled Server Administration: The eRoom Administration Console is Web-enabled, allowing remote administration of eRoom servers via a browser. The eRoom solution also provides a Snap-in for the Microsoft Management Console for centralized server and facility administration. A variety of administrative reports provide a comprehensive picture of who is using the eRoom software and how. Views range from bird’s eye to detailed information using Excel pivot tables. The reports are also easily customized.

Support for Microsoft SQL Server 7.0: Customers may choose to optionally run their eRoom Server with SQL Server 7.0 as the primary database. This new support extends the reach of MS BackOffice and helps customers leverage their existing investment.

What’s New in eRoom 5.0

If you are already familiar with eRoom, then you will appreciate the new features that eRoom Technology has added in eRoom 5.0 for today’s fast-cycle projects across an organization’s extended enterprise of customers, partners, and suppliers.

New eRoom 5.0 features include:

Calendar Item Type: A Group Calendar tracks events and is a convenient way for project team members to schedule and be aware of key dates in the project lifecycle. Users can synchronize their calendar events from one or more eRooms into their Outlook Calendar, providing a single place for calendar coordination. *Note: See Exercise 3 in Practice Exercises*

Database Item Type: A way to have structured data within an eRoom. Building on the concept of the “List” Item type from version 4.0, the database offers a variety of ways to display content such as Contact Lists, tracking of project issues, milestone lists, and other items the project may require. The user has flexibility over what can be entered, displayed, and searched upon. Users can build databases tailored to the specific need of the project and control what is seen in searching by others in the eRoom. When necessary, database items can even be shared across multiple eRooms. *Note: See Exercise 2 in Practice Exercises*

My eRooms: A portal-like way of displaying information about your most commonly accessed eRooms. My eRooms provides a single place to go for users in a simple, Web-friendly format. This page can become a user’s home page or just their central list of eRooms. It can be easily customized by end users and is easy to navigate. *Note: See Exercise 6 in Practice Exercises*

Status Display: Each eRoom now has a visual status that can be displayed at a top level to enable users to quickly ascertain the status of a project within an eRoom without checking contents. This status is displayed in a My eRooms page and can be easily changed by the coordinator of an eRoom.

Unified Client: The eRoom client architecture has been improved so that most functionality is available within a normal browser. Additional functionality such as drag and drop support and rich text editing can be added *via* an optional plug-in. Users see the same standard interface no matter how they access eRooms. **Note:** *See Exercise 1 in Practice Exercises*

Alert notifications can be sent for items: All items within an eRoom have an “Alert” option that lets users send either an e-mail or an instant message to a select list of recipients, notifying them that the item has changed and inviting them to participate in the eRoom. This lets eRoom users instantly notify other eRoom members of key changes. **Note:** *See Exercise 2 in Practice Exercises*

Offline Reading: For users that need to work offline, the eRoom product allows users to store and read important elements of eRooms when using Microsoft Internet Explorer 5.0 or higher. Mobile users can now take other important eRoom data with them while working offline. Items such as Discussions, Notes, and Inbox postings can now be read while disconnected from the network or Internet. This gives users much more flexibility while away from the office. **Note:** *See Exercise 7 in Practice Exercises*

Other new eRoom 5.0 features include:

Enterprise Directory Support: eRoom can now integrate with most existing directory infrastructures, enabling administrators to select names directly from any LDAP-compliant server. This augments the already existing interaction with NT Domain directories. Microsoft Active Directory integration is also available as part of the LDAP integration. Additionally, eRoom allows administrators to add multiple directory sources so that names can be selected from multiple sources, and eRoom also provides conflict resolution so duplicate names are avoided.

Access Control via Wizard: This new feature lets users define the Access Control list for a given item as they create it. It follows the rules for whatever default access control has been set for items within that folder.

Default Access Control for Folders: Users who have the ability to create new folders within an eRoom can define a pre-set access control as a default for all items subsequently created within that folder. This feature is an easy way for the creator of a folder to define a pre-set level of access for everyone that uses that folder in the future.

Databases: Import and Export of Text: This feature allows users to import or export CSV files to/from an eRoom database item. Data can come from any number of sources, such as Microsoft Project, Excel, and many other applications that support the export of data into the CSV format.

Page and item resizing: eRoom pages now automatically resize to match the screen resolution in use to enable more information to be displayed to the user within the available screen real estate. Pages and dialogs resize to fit the screen correctly, and the navigation pane and toolbar have sizing toggles to expand or shrink them as needed.

License Handling: With the advent of very large user directories, eRoom licensing has been changed so that names can be available for use within eRooms on a server, but they are not used until a user logs into the eRoom Server. The benefit is that administrators can now have many names available for selection by users without using up their user licenses. The license must be available when the user logs in. If none are available, the user receives an error message, and the server logs the error.

Time Zone Control: Each member of an eRoom can set his or her current time zone to reflect accurate date and time stamping of entries. In eRoom 4.0, any new item created is “logged” with the current time of the eRoom server, not the location of the member. eRoom 5.0 addresses this so you can make a comment in any time zone and have that time displayed with your entry.

Extra Files: Administrators will be able to customize eRooms as never before. Each eRoom created on a 5.0 server gets a directory created for it on that server for placement of extra files or applications that can be referenced from that eRoom. The eRoom can be made to link to the information in these extra files *via* an absolute or relative URL. In this way, eRoom functionality can quickly integrate with an organizations other Web applications in a way that is seamless to the end user. Access to these files or applications is controlled *via* the eRoom login security and cannot be bypassed *via* direct link. An eRoom with extra files content that is exported will contain all the extra files data as well.

Creation of Custom Pages: In conjunction with the Extra Files functionality, custom HTML pages can be built and referenced to replace the default “welcome page” of an eRoom. By creating a file called eroom.html and placing it in an eRooms Extra Files directory, that page will automatically become the first page seen by users when they enter an eRoom. Anything that can be supported by a user’s browser, such as HTML, Flash or Shockwave can now be presented as part of the opening screen to an eRoom.

Installing eRoom 5.0

System Requirements

You can either review eRoom 5.0 as an application hosted on your own Web Server, or as a “hosted” application on eRoom Technology’s own Web Server.

If you choose to host eRoom on your own server, then please review the minimum requirements in the chart below for both the “Client” and the “Server.”

If you are going to be using an eRoom hosted on eRoom Technology’s server, then you only need to pay attention to the “Client” requirements.

	Client	Server
Hardware	<p>For browser-only access, system requirements are that of the browser itself. Please verify that your hardware meets the minimum requirements specified by the browser manufacturer.</p> <p>For Browser access with the plug-in: 166 MHz Pentium (133 MHz Pentium minimum) 48 MB RAM (32 MB minimum) 4 MB free disk space</p>	<p>500 MHz Pentium (300 MHz Pentium minimum) 256 MB RAM 125 MB free disk space (70 MB minimum)</p>
Software	<p>Windows 95 (with Service Pack 1 or 2), Windows 98 or NT 4.0 (with Service Pack 4 or higher) Windows 2000. Macintosh 8.1 or higher Solaris 5.7 or higher HP-UX 10.20 or higher</p> <p>Netscape Navigator/Communicator 4.08 or 4.6 and higher. Version 6 is not currently supported. Microsoft Internet Explorer 5.0 or higher .</p>	<p>Windows NT 4.0 Server (with Service Pack 4 or higher) & Microsoft IIS 4. Microsoft Windows 2000 Server or Advanced Server.</p>

Practice Exercises

You can use the existing sample eRooms that come with the product or create your own from the following 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. Create a My Stuff folder.
4. Open the My Stuff folder and create a folder with your name on it. Be sure to enter a description.
5. Create a Note entitled “My Favorite Pastime is <name>.” Add a brief note about the pastime.
6. Use the Up a Level button to go back to the top level.
7. Expand the My Stuff folder, right click on your folder *icon* and rename it (make something up).
8. 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.
9. 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.
10. 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.
11. 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.
12. Set up a Template-Item button and two routing buttons on your original folder (created in My Stuff). Route items to the folder you created in Step 10.
13. Change the Access Control on your folder to *Everyone who can open the folder*.
14. 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.
15. 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.
16. 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.

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 8:00 am 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 ten users to your eRoom and five coordinators.
2. After the eRoom is created, select three 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 of 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. Click on the “Create” button and select “Database.”
2. Enter the name of your database as “Key Contacts.”
3. From the list of template databases, select the pre-defined “Contacts” style. This list can be customized and extended by Server Administrators.
4. eRoom then creates the item and you can begin entering project contact information.
5. You can also easily create a “Custom” database item of your own design. Try it by following the steps 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.
 - Continue through the different database options. They should be self-explanatory.

3. When done, make up five to six 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 Microsoft Outlook synchronization

1. From the eRoom monitor, launch My eRooms.
2. Change the settings so that all eRooms are displayed in a block format (three 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. Note, that these tabs will only be available if Microsoft Outlook is installed on the machine you are using.

Exercise 7. Working Offline (Advanced)

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.

About eRoom Technology, Inc.

eRoom Technology, Inc., is a leading provider of Internet-based software and services for collaboration among an organization's extended enterprise of employees, customers, suppliers, and other partners. The company's eRoom product provides a digital workplace for business, allowing organizations to quickly assemble a project team wherever people are located and manage the collaborative activities that support their complex and rapidly-changing business projects and processes. Customers use eRoom digital workplaces to help get products to market faster, drive down production costs, enhance customer relationships, and improve the work products that drive their businesses. The eRoom solution is used by more than 450 companies such as A.T. Kearney, Bausch & Lomb, Compaq, Deloitte Consulting, EDS, Ford Motor Company, Hewlett-Packard, Ketchum, KPMG, Pfizer, Siemens, Solectron, Towers Perrin, and Verizon.

eRoom Technology was co-founded by President and CEO Jeffrey Beir and Senior Vice President and CTO Pito Salas in 1996. Both are well-known veterans of the software industry with an established track record of success in the electronic business collaboration market. eRoom Technology has successfully completed four rounds of funding, and is currently backed by prominent investors including Ford Motor Company, Brinson Partners, Haebler Capital, Matrix Partners, North Bridge Venture Partners, New Enterprise Associates, Atlas Venture, HarbourVest Partners, Essex Investments, Credit Suisse First Boston, and Dain Raucher Wessels. eRoom Technology is privately held, and is based in Cambridge, Mass.

More information about eRoom Technology and its product offerings can be found at the company's Web site, www.eroom.com.

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