



ERNEST ORLANDO LAWRENCE
BERKELEY NATIONAL LABORATORY



INFORMATION TECHNOLOGY
DIVISION

eRoom Basics

Curtis McDonald
Information Technology Division

Agenda



- **What is it?**
- **What is it used for?**
- **Who Uses it currently?**
- **Costs**
- **Additional Training**
- **How to use it - Basic Functions**



INFORMATION TECHNOLOGY
DIVISION

What is it?



- **Cross platform, web based collaboration tool**
 - **Windows, Mac OSX, Linux and Solaris**
 - **Internet Explorer, Mozilla, Safari, Konquerer**
 - **Plug-in (for Windows only) allows for**
 - ~ **Drag and Drop**
 - ~ **Rich Text capabilities**
- **Backend is Windows server/IIS based (ssl secured)**
- **Authentication via LDAP, or eRoom accounts for people outside LBNL**



3

What is it used for?



- **Web Service allowing multiple people to work on shared data**
- **Collaboration**
 - **Not meant to replace a home directory**
 - **Good group shared area - Version Control**
 - **Single location for all data regarding a project, group, or process**
 - **Small to medium sized Projects**



4

What is it used for?



- **Top Features:**
 - **Easy to share knowledge among a team**
 - **Easy to search for data**
 - **Easy to provide management overview of projects**
 - **Automatic Version Tracking by default**
 - **Daily email notifications for updated items, tasks and project status**
 - **Access controls for editing, viewing or hiding**



5

What is it used for?



- **Top features: Beyond Sharing Documents**
 - **Freeform databases**
 - ~ **Import and export to/from csv (spreadsheets)**
 - ~ **Enterprise databases – rollup information from multiple eRoom databases**
 - **Project plans – Gantt charts**
 - ~ **Assign people to tasks with due dates and progress reporting**
 - **Email Inboxes**
 - ~ **People without an eRoom account can send documents into system**
 - **Threaded discussions**
 - **Instant messaging**
 - **Polling (take a vote)**



6

Who uses it currently?



- **550 users (Jan. 4, 2006)**
- **153 eRooms (Jan. 4, 2006)**
- **20 GB (GigaBytes) of data**



INFORMATION TECHNOLOGY
DIVISION

7

Who uses it currently?



- **Heavily used in Scientific and Operations areas**
 - **Scientific users include**
 - ~ **The Molecular Foundry**
 - ~ **The Joint Genome Institute**
 - ~ **Nuclear Science**
 - ~ **General Science**
 - **Operations users include**
 - ~ **Information Technology**
 - ~ **Office of the Chief Financial Officer**
 - ~ **Human Resources**
 - **13 Operations and Scientific organizations for PRDs in 2005**
 - ~ **Recruiting**
 - **And many others...**



INFORMATION TECHNOLOGY
DIVISION

8

Costs



- **\$12 per person per month**
 - **If a member of 20 eRooms, still only \$12**
- **\$2.50 per GB (GigaByte), per eRoom**
 - **First 1 GB 'Free' (included in user costs)**
 - **Only 6 eRooms currently > 1 GB**
- **\$110 per hour recharge T&M (Time and Materials)**
 - **Creations of eRooms, external users and consulting requiring more than 30 minutes.**



9

Training



- **Custom provided to each group through 2005**
- **Guided tour available in help pages on web**
 - **https://erom2.lbl.gov/eRoomHelp/en/eroms.htm#guided_tour**
- **Berkeley Lab Institute classes**
 - **Basic class - 1 hour**
 - ~ **Navigation**
 - ~ **Document check-in & check-out**
 - ~ **Access Rights**
 - **Advanced class - 3-4 hours (beginning March 2006)**
 - ~ **Covers all features**
 - ~ **Hands on**
 - ~ **Held in Computer Training Room**



10

Basics: Access & Logging in



- **Before logging in, you must be given access to an eRoom**
 - **New eRooms are created by the the eRoom administrator eroom@lbl.gov**
 - ~ **New eRooms are created for Projects, Processes, or Groups**
 - **Each eRoom has 1+ coordinator(s) who can add and remove people from a specific eRoom**
- **Once you have been added to an eRoom, login at <http://www.lbl.gov/eroom>**



INFORMATION TECHNOLOGY
DIVISION

11

Basics: Access & Logging in



- **Before logging in, you must be given access to an eRoom**
 - **New eRooms are created by the the eRoom administrator eroom@lbl.gov**
 - ~ **New eRooms are created for Projects, Processes, or Groups**
 - **Each eRoom has 1+ coordinator(s) who can add and remove people from a specific eRoom**
- **Once you have been added to an eRoom, login at <http://www.lbl.gov/eroom>**
 - **Note: Windows users should use IE (Internet Explorer) to login the first time and install the plug-in. After install, the plug-in will work with Mozilla & Firefox**



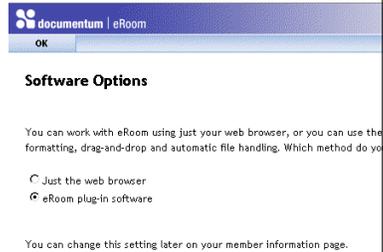
INFORMATION TECHNOLOGY
DIVISION

12

Basics: Plug-in Install (Windows)



- When prompted, choose to install the plug-in software
- Continue through the installation and return to <http://www.lbl.gov/eroom> when the install is completed.



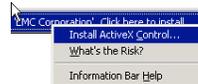
Basics: Plug-in Install (Windows)



- If Internet Explorer does not prompt you to install the plug-in and displays the yellow Active X Control bar



- Click the bar and select Install Active X Plug-in



Basics: Plug-in Install (Windows)



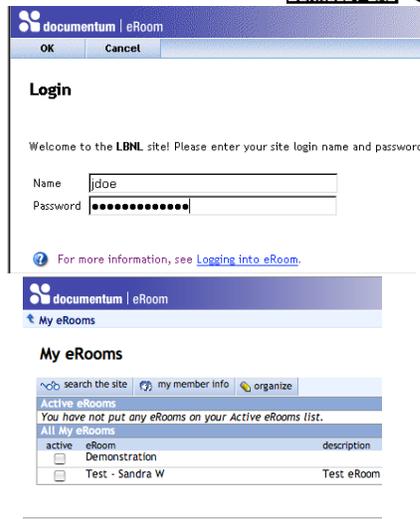
- If Internet Explorer does not prompt you to install the plug-in, or show the Active X control bar, choose
 - Tools pulldown menu and select Internet Options.
 - Security and Trusted sites. Click Sites button.
 - Add https://*.lbl.gov
 - Click close and OK. Go back to <http://www.lbl.gov/eRoom> and install the plug-in and proceed with previous steps.



eRoom login



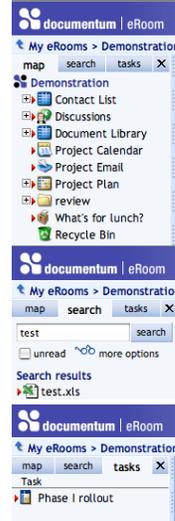
- Enter your LDAP (email and calendar) user name and password to login to eRoom.
- Your eRooms will be listed, select one to enter.



Navigation: Left Bar



- **Map**
 - **Explorer view of everything in your eRoom. Click on plus sign to show contents of items.**
- **Search**
 - **Search for names of items and words inside any items**
- **Tasks**
 - **Items assigned to you in this eRoom**



17

Navigation: Top Right icons



- **Red arrow links to unread items and items changed since last viewed** 
- **Blue IM (Instant Messenger) dialog. Real time chat with other people currently in this eRoom** 
- **Paper airplane sends an email to other people in the eRoom. Adds link to exact location currently viewing** 
- **Question Mark links to Help Pages** 
- **People shows who is currently in the eRoom. Hold cursor over icon to display current members.** 



18

Navigation: Main area (Top)



create search events members

- **Create allows you to create an eRoom item**
 - **Folders, Discussions, email inboxes, etc.**
- **Search displays advanced search options**
 - **Also available through left side menu**
- **Events shows events in the eRoom Calendar**
- **Members allows eRoom coordinators to modify the members of an eRoom**



INFORMATION TECHNOLOGY
DIVISION

19

Navigation: Main area (Bottom)



create add file mark read commands

- **Create allows you to create an eRoom item**
 - **Folders, Discussions, email inboxes, etc.**



- **Add File allow you to upload a file**
- **Mark Read used to remove the red arrow next to an unread item**
- **Commands changes to detailed view and shows all command options**

create add file access notification
select all cut copy copy link paste delete mark read mark unread



INFORMATION TECHNOLOGY
DIVISION

20

Adding documents



- **Drag and drop from your desktop, or another window, with the windows plug-in.**
 - **You cannot drag and drop from Mozilla or Thunderbird email clients**
- **Click add file and browse for file**

Demonstration
an eRoom created on 3 Oct 05

create search events members

Name	Modified	Owner
Contact List	15 Nov 05 11:58am	eRoom Admin
Discussions	15 Nov 05 11:57am	eRoom Admin
Document Library	15 Nov 05 12:51pm	eRoom Admin
Project Calendar	15 Nov 05 11:58am	eRoom Admin
Project Email	15 Nov 05 11:59am	eRoom Admin
Project Plan	15 Nov 05 11:26am	eRoom Admin
review	15 Dec 05 3:06pm	eRoom Admin
What's for Lunch?	15 Nov 05 1:00pm	eRoom Admin
Recycle Bin	3 Oct 05 12:05pm	Coordinators Only

create add file access notification
select all cut copy copy link paste delete mark read mark unread

21

Editing documents



- **Choose edit document to**
 - **Check out the file**
 - ~ **No one else can edit it while it is checked out**
 - ~ **Anyone else can still view it while checked out**
- **If you simply click the file name, you are only viewing it**
 - **It is not locked**
 - **Anyone else can check it out and lock it while you are viewing it.**

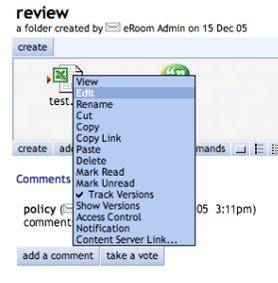


22

Editing documents (with plug-in)



- **Right click on the icon for the document and select Edit**
 - **The document will download and open in the proper application.**
 - **When the document is closed it will automatically be saved back to eRoom as a new version.**
 - **You will be prompted for version information.**



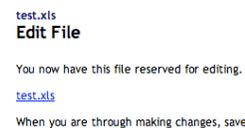
INFORMATION TECHNOLOGY
DIVISION

23

Editing docs (without plug-in)



- **Right click on the icon for the document and select Edit**
 - **You are prompted to edit, rename, or add a new version**
 - **A link to the document will display.**
 - **Download and open in the proper application.**
 - **When finished editing, save the document and click add to upload a new version.**
 - **You will be prompted for version information.**



INFORMATION TECHNOLOGY
DIVISION

24

Resources for information



- <http://www.lbl.gov/ITSD/CIS/citg/eroom/>
 - eRoom overview
- <https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm>
 - eRoom Help Page
 - Select  in top right corner of any eRoom page
- Custom eRoom Training & Consulting from lab eRoom expert.
 - Recharged at \$110/hour



Questions?

