

## eRoom user guide

**English version 7.4.4**

JOINT Collaboration AS

[www.joint.no](http://www.joint.no)



# JOINT Collaboration

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## What is eRoom?

Documentum eRoom is one of the world's leading Web-based collaboration applications and can be rapidly rolled out in a project or an organization. With eRoom you and your project participants can work together and share information regardless of time and location.

Participants need only a PC with Internet access, a username and a password.



Working together using eRoom saves a project meeting and travel costs since discussions, clarifications and decisions can take place directly in eRoom. Participants will also save time when looking for documents since everything is available in eRoom and can be retrieved with a couple of keystrokes.

eRoom's inbuilt functions help project participants maintain a good overview of documents, meetings, ongoing issues, and statuses, among other things. In addition to this, eRoom provides very good solutions for planning, decision making, working together on and approving documents, status reporting, managing changes, and managing drawings. eRoom's flexibility also provides a wide range of options enabling you to adapt its structure to the project's own needs and routines.

An improved focus on how participants will work together in, and the planning of, the collaboration prior to a project starting, results in simpler information sharing, less uncertainty and fewer misunderstandings.

eRoom is easy and intuitive to use, it has a low user threshold, and most users do not need training before using the application.

This manual provides a good starting point when using eRoom.

We recommend that everyone explore the various options and simply see what happens when you click the different buttons. Remember, you can never delete something that someone else has saved! Nonetheless, it may be a good idea to create a 'playroom' to do this is in so that everyone does not receive alerts about the various testing taking place in the room.

Tell your project coordinator you want a 'playroom' so he/she can create one so that everyone has a place to explore all the various options!

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## Logging into eRoom

When you are going to participate in a project, an eRoom user account will be set up by the eRoom's coordinator, who will normally send you an invitation by email. It may look like this:

Cc:  
Subject: Invitation to the eRoom project

Hi, you're invited to this eRoom

Please join us in the eRoom project template (TG) eRoom!

Just point your browser to the following address:

<https://joint3.prosjekthotell.com/eRoom/JOINTTestProtect/eRoomprojecttemplateTG>

Your login name is:

[torben.gjerstad@joint.no](mailto:torben.gjerstad@joint.no)

If this is your first JOINT ProjektHotell eRoom, please protect your account with a password a

We're looking forward to your arrival!

Torben Gjerstad  
eRoom project template (TG) eRoom Coordinator

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EMC Documentum: The Leading Enterprise Content Management and Extended Enterprise Cc

You will receive your password either in the same email, a separate email or via a link in the email (depending on the options chosen for the eRoom you are going to join). In either case, follow the logging in instructions. You can choose the following methods for subsequent logins:

Login via the icon in the system tray on the taskbar (recommended):



Click the link in the email or eRoom report

Click the server shortcut or eRoom you have yourself added to your browser Click [www.joint.no](http://www.joint.no) and use the login button here  
(only applies to users of <https://joint.prosjekthotell.com/eroom>)

## What is the eRoom plug-in?

eRoom is a Web-based application that can be used either with or without the plug-in. The plug-in is a small 'program file' that is downloaded and installed locally on your PC. This provides extra functionality, e.g.:

- You can drag and drop documents to and from eRoom
- You can synchronize meetings and tasks in Outlook
- You can create documents directly in eRoom
- You can write comments and other text in rich text format (using various fonts, colors, hyperlinks, etc.)
- The plug-in makes logging in easier because it puts the  icon in the system tray on your taskbar which you can click to go to the login page:



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The first time you login to eRoom you will see the following window:

You can work either WITHOUT the plug-in (“Just use the web browser”) or WITH the plug-in (“Update the eRoom plug-in software”). We recommend that you download the plug-in, i.e. choose the same option as in the window above.

NB! Some companies have restrictions concerning who can install software on a PC. Contact your IT department if this applies to you.

## How do you know if you are working WITH or WITHOUT the plug-in?

Even if the icon is in your system tray that does not necessarily mean that you are logged into eRoom with the plug-in.

To check whether you are working with or without the plug-in point at the banner at the top of the screen (in the project eRoom or My eRooms). By the banner we mean:

A yellow box will be displayed stating either:

# JOINT Collaboration

v7.44.504.74 (A) with plug-in

Or

v7.44.504.74 (A) without plug-in

If you can see that you are not using the plug-in, there are two ways to turn it on:

1. Click [my member info] on My eRooms, or 2. Click the [members] button in the eRoom and then click your own name



This will bring up your personal information, as below:

The screenshot shows the 'Member Information' page with various input fields for personal details like First name, Last name, and Organization. At the bottom, there are two buttons: 'change password' and 'change personal question'. Below these buttons is a checkbox labeled 'Use eRoom plug-in software', which is checked and highlighted with a red circle.

Make sure that you have ticked the box right at the bottom of the window, like in the window above. If you did not install the plug-in when you logged in for the first time, this will now begin to download and be installed.

## My eRooms – you own page

When you login to eRoom via the icon in the system tray, you will go to a page called ‘My eRooms’ (links in emails will take you directly to the eRoom you are a member of).

My eRooms displays all the eRooms you are a member of, and here you can adjust this by selecting which eRooms you want active, and choose what you want to be displayed in “My dashboards”.



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My eRooms can look like this:

The screenshot shows the JOINT Collaboration platform interface. At the top, there's a header bar with the JOINT logo and a 'My eRooms' button. Below the header is a navigation bar with links: 'search the site', 'create an eRoom', 'my member info', and 'organize'. The main content area has tabs for 'eRooms' (which is selected) and 'Dashboards'. Under 'eRooms', there's a section for 'Active eRooms' containing a list of rooms: 'Administrasjon og intern info', 'Dokumentasjon eRoom', 'eRoom kurs/konsulent/utvikling', 'Margrethe privat' (with a minus sign), and 'Statusrapport tekst'. Below this is a horizontal line, followed by a list of categories: 'Produkt', 'Support', 'Marked', 'Byggemodul - testrom', and 'eRoom project template (TG)'. Another horizontal line follows. Then there are sections for 'Kunder' (with 'Siggerud skole og Siggerud barnehage - detaljprosjektering'), 'Administration', and 'Site Settings'. At the bottom of the page, there's a footer with the text 'JOINT Collaboration AS | support@joint.no | www.joint.no'.

For coordinators: if you have been given rights to create new eRooms, you will see a button next to

[search the site](#) called [create an eRoom](#).

From this page you can click yourself into the eRoom you wish to enter (from the eRoom you can return to My eRooms by clicking the [My eRooms](#) button at the top left of the eRoom).



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## A project eRoom may look like this

No two eRooms are alike (unless the same template was used to create the eRooms) since they are filled with content and structure based on the project's needs. A typical eRoom may look like this:



## What do the various icons mean?

The various icons display various functions in an eRoom.

eRoom's items (e.g. folders, calendars, databases, etc) are used in different ways in order to structure and hold together the project information. Every eRoom item has its own properties that define its purpose and describes its characteristics. All items have a name and a title so that you can easily find the information you want.

All participants can create items in the eRoom, even if there is already content in the eRoom. The first level (everything that is shown on the front page, as in the screen above) is often restricted such that no one is allowed to change this, only the content further down the structure.

The button provides access to all the items ('the toolbox'):



The various items are described below:



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## ***Folder***



A folder can contain several subfolders or documents, notes and any other type of item. An eRoom folder is almost like a folder in Windows Explorer.

## ***Discussion***



A discussion area can be created to allow several participants to contribute issues that are going to be discussed and clarified. Participants can add their own comments and can also add file attachments to a discussion.

## ***Note***



A simple text page (e.g. like Notepad in Windows), with areas for file attachments and comments.

## ***Calendar***



In this calendar you can create individual meetings, recurring meetings, and it can also be used to call meetings. You can also add information about the meetings. You can choose to display all project meetings or just your own. The calendar can also be synchronized with Outlook.

## ***Poll***



With this function you can, for example, hold a vote. You can pose a question to your team, specify ballot choices, capture votes, and tabulate results. This is useful for, for example, user surveys. Responses can be public or anonymous (only displayed to the coordinator).

## ***Project plan***



Here you can create schedules and other plans for your project. These can be displayed as Gantt charts, users can be assigned tasks, and update statuses. This makes the plan dynamic instead of being a static MPP file, which one previously had to save in a folder.

## ***Inbox***



The project can have its own inbox with its own email address. In this way external sources can send email to the project and this will be stored in chronological order in the inbox, enabling all the participants to monitor the project's communications, including those with external sources.

## ***Link***



A shortcut to a file or page in your project eRoom, to another project, or to other websites.

## ***Dashboard***



Via My eRooms you have an opportunity to gain an overview of databases, project plans, and the meetings you have in the different eRooms you are a member of. You select the information that you want from individual eRooms. You can also go directly

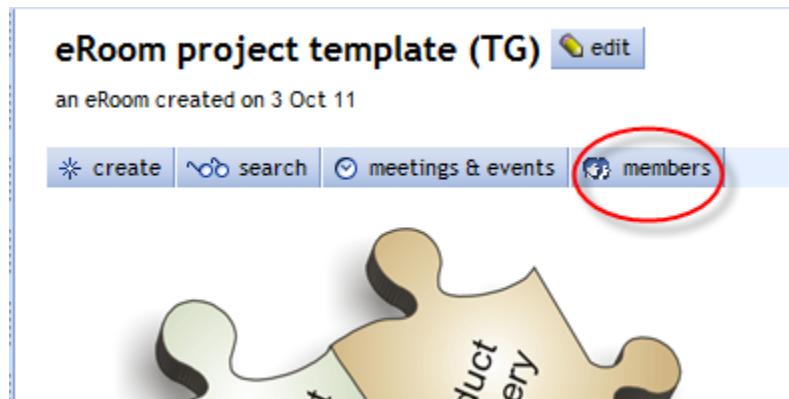


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from the dashboard to an eRoom via a link. Dashboards can also be created in an eRoom, e.g. to provide a better overview of the resources in a project.

## Who is participating in a project?

You will find the [members] button on project eRoom's front page.

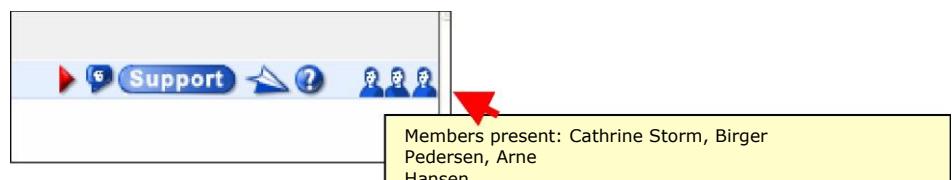


Click this to view who is participating in the project together with you. Here you will also see which company they are from and you can sort the list by clicking on the columns' titles (e.g. sort by company). There is an envelope icon next to each name:

name
Storm, Cathrine
Bergersen, Per
Birger Byggherr
Edvard Elektrok

If you click this, your Outlook (or other email application) will open with the user's email address in the 'To:' field.

To see who is logged on right now, at the same time as you, you can point to the head(s) displayed in the top right-hand corner or your project eRoom:



If a person is inactive (i.e. does not click anything in the eRoom) for three minutes, then his/her head will no longer be displayed (even if the person has not logged out of the eRoom).

Being able to see that other participants are in the project eRoom at the same time as you, results in a sense of working in a team on the project.

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## Creating or adding documents

It is very easy to add files in an eRoom. There are several ways of doing this:

- Drag and drop a document from your own PC/Windows Explorer to where you want it in the eRoom (only with plug-in). You can drop the file right over a folder and it will be inserted into the folder. You can also drop a file over the icon for a database entry and it will be inserted in this entry's attachment box, like below:

If you want to, you can select several files at once and drag them into eRoom.

- Click the [add file] button when you are in the window where you want the file to be added, as shown in the window below:

The screenshot shows the eRoom project template (TG) interface. On the left is a navigation tree with nodes like 'eRoom project template (TG)', '00..Progress plan', '01..Project calendar', '02..Project administration', '03..Project org.', '04..Public info', and '05..Correspondence'. The '03..Project org.' node is selected. Inside, there are two files: 'Spec.docx' and 'word.docx'. At the bottom of the list is a toolbar with buttons: 'create', 'add file', 'access', 'notification', 'custom', 'select all', 'cut', 'copy', 'copy link', 'paste', and 'delete'. The 'add file' button is highlighted with a red circle.

Browse through your own Windows Explorer/PC to fetch the file. Files can only be fetched one at a time with this method.

- Click the [add file] button as above, but create the document directly in eRoom by selecting the file type and giving it a name (only with plug-in):

The screenshot shows the 'Add File' dialog box. It has two main sections: 'Upload a file from my computer' (radio button) and 'Create a new file in eRoom' (radio button, selected). Under 'Create a new file in eRoom', there are fields for 'Name' (set to 'Referat') and 'Type' (set to 'Microsoft Word Document'). At the bottom are checkboxes for 'Track versions', 'Upload, then add another', and 'Private draft'.

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## How do I edit a document in eRoom?

You can edit your own documents, or other people's documents that you have been granted rights to edit (you are listed as an 'owner'). Right click the document and select "Edit". The file will open in an appropriate application, you edit it, and save it directly back into eRoom (this requires plug-in).

If you are not using the plug-in, you will be told to save it to your PC first before moving it over.

## How do I keep different versions of documents in order?

In some circumstances it may be very useful to keep all the versions of a document, e.g. agreement documents, reports or drawings. This is also useful in those cases where several people will be working on the same document together. It is the 'owner' of the document who chooses whether or not version control is turned on. Right click the file icon and select "Track versions".

You will see that an extra icon has appeared next to the file name and that (v1) now shows in the right margin.

If you now edit this document and resave it in eRoom, eRoom will ask you to add version comments. This can be useful for others to read so that they know why a new version of the document was created.

Once you have written the comments for this version, the file will be resaved in eRoom and you will now see that it says (v1) in the right margin.

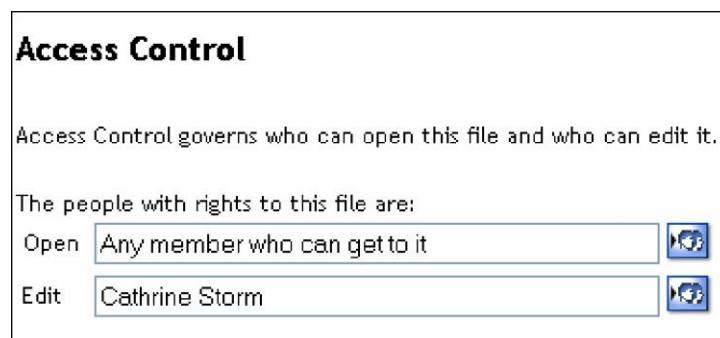
Name	Modified	Owner	Size
Spec.docx	3 Oct 11 2:46pm	Torben Gjerstad	10 k (v1)

Click on the  icon to the right of the filename to see earlier versions of the filename.

You can also turn off version control later on by right clicking and clicking "Track versions" again. eRoom will then only keep the latest version.

## How do I decide who can do what with my document?

When you add a file in eRoom, only you are listed as the owner of the file, although everyone can read it, i.e. everyone has the right to open it (unless you have added the file in a restricted area of the eRoom), as shown in the window below:



As the owner of the document you have the right to edit it as well. You can both restrict who is able

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to open the document, and also grant others the right to edit it (e.g. if several participants are working on a report together).

To modify access to a document (access control) you can either:

- Right click the document icon and select “Access control”, or
- Click the name to the right of the filename, as shown below:



- Tick the document (or several documents), click [access] in the row of buttons under the file(s), and then click to choose names (or roles) from the list of members.

The same method is used to control access to folders and other items.

## Using roles for access control, alerts and approval

It is a good idea to use self-defined roles in the project eRoom to simplify access management. You create the roles you want in the project in advance on the member page by clicking [add a role]:

A screenshot of a web-based application titled 'Members of the Rom for Bygg & Anleggsprosess eRoom'. The interface includes a top navigation bar with buttons for 'add', 'remove', 'invite', 'add a role' (which has a red arrow pointing to it), 'change roles', and 'hide via-group members'. Below this is a section titled 'Groups & Roles' with a table. The table has columns for 'name' and 'role'. It lists five roles: 'Prosjekt-/prosjekteringsleder' (role) as Coordinators, 'Arkitekt' (role) as Participants, 'Byggherre' (role) as Participants, 'Entreprenør' (role) as Participants, and 'Konsulent' (role) as Participants.

name	role
Prosjekt-/prosjekteringsleder (role)	Coordinators
Arkitekt (role)	Participants
Byggherre (role)	Participants
Entreprenør (role)	Participants
Konsulent (role)	Participants

When you add a new member, eRoom will ask you to assign him/her a role. The user will then automatically have access to everything this role has access to.

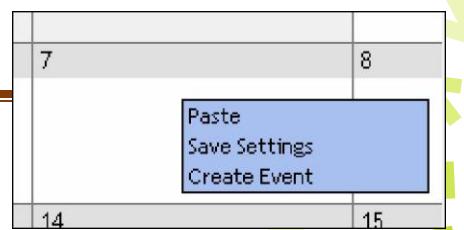
Roles can also be used to send an alert to everyone assigned one or more roles. If, for example, one wanted to alert all consultants about something, you simply tick this role in the alert, meaning that you do not have to spend time ticking all the relevant names.

You can also create a role that allows users to approve something in an approval database. Everyone assigned this role would then have permission to approve things that this role can approve.

## Creating and calling meetings

The calendar is used by many users to log all meetings that take place in the project. In this way everyone can easily see which meetings are taking place in the project, and who is supposed to participate in them.

Right click the day you want to have a meeting and select “Create Event”:



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You can now add a name, time, duration, etc, and click the  icon to select meeting participants from the list of members.

We also recommend that you add an agenda in the “Description” field:

Description

Trebuchet MS 10 **I**

**Agenda:**

- Report of last meeting
- Economy
- Progress of project
- Resource issues
- Timeline
- a.o.b.

By providing as much information as possible about the meeting directly in the calendar, you do not have to spend time creating a separate meeting notice, but can instead use the alert function to invite everyone who is supposed to participate. A meeting with an agenda and link to relevant documents that are saved elsewhere in the eRoom is shown below.

## Project meeting

an event created by  Torben Gjerstad on 4 Oct 11

start meeting	
Start time	4 Oct 11 10:00am
Duration	1:00
Participating eRoom members	Margrethe Alnes - JOINT, Torben Gjerstad
Participating non-members	

### Agenda:

- Report of last meeting
- Economy
- Progress of project
- Resource issues
- Timeline
- a.o.b.

### Attachments

Name
<input type="checkbox"/>  4-weeks plan 
<input type="checkbox"/>  SampleSNAG.snag 
<a href="#">create</a> <a href="#">add file</a> <a href="#">access</a> <a href="#">notification</a> <a href="#">custom fields</a>
<a href="#">select all</a> <a href="#">cut</a> <a href="#">copy</a> <a href="#">copy link</a> <a href="#">paste</a> <a href="#">delete</a> <a href="#">mark read</a> <a href="#">mark unread</a> <a href="#">refresh</a>

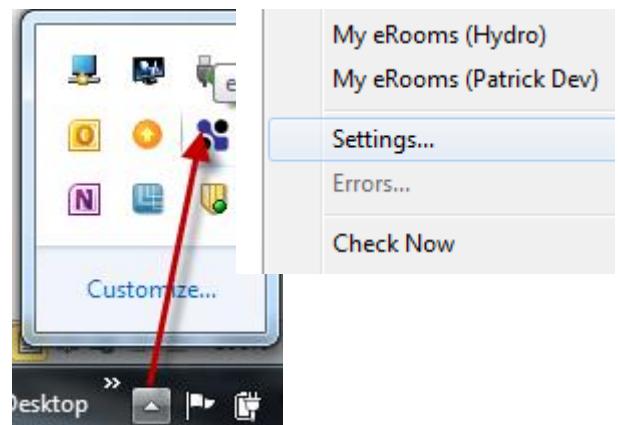
Participants will be reminded of the meeting in their eRoom report. In addition to this it is normal to send a separate alert (as a meeting notice) to the participants.

## Can you synchronize the eRoom calendar with your own Outlook?

Yes, you can. If you set up this synchronization, the meetings you are listed on will be shown in your own **Outlook calendar**. This synchronization does not work the other way (i.e. your dental appointments will not be displayed in eRoom).

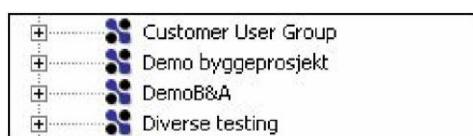
The synchronization is set up as follows (one time process):

Click on  in your system tray (next to the clock in the bottom left of the screen). Select “Settings...”,



click  **JOINT ProjektHotell** (or the name of your server) and 

You will now see all the eRooms you are a member of, e.g.:

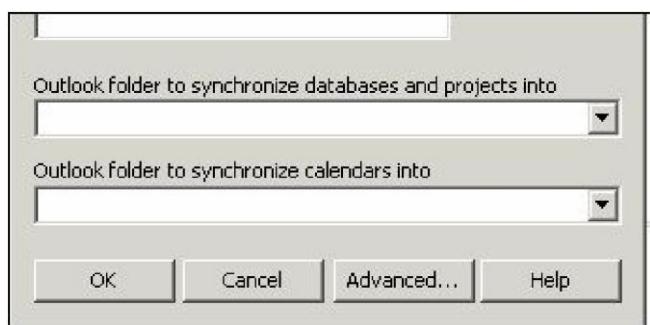


Click the plus sign next to the eRoom you want to synchronize from, and select what you want to synchronize, e.g.:



Click [OK].

In the bottom two lines you choose where you want to synchronize into:



The top one is for tasks, so here you select your Outlook tasks. In the bottom one you select the Outlook calendar you want to synchronize into.



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Next click [OK]. You have now set up the synchronization and do not need to do it again, unless you are assigned new projects or calendars to synchronize from – in this case you go in and select these as well and then click [OK].

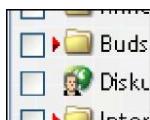
All the meetings you are a participant in will now be added to your Outlook calendar.

NB! eRoom cannot check for meeting conflicts in members' Outlook calendars.

## Avoid long email discussions – resolve issues directly in eRoom

Many users spend a lot of time saving and searching for emails containing discussions about various issues in a project. You can avoid this by creating, discussing and concluding issues directly in eRoom. In this way you avoid having lots of participants getting the same email and replying to it all over the place.

In eRoom you can either create separate discussion areas for more ad hoc discussions, or systematize them by using an eRoom database which makes it easy to see the status of the issue, responsibilities, deadlines for solutions, etc.



A good way of managing project issues is to utilize a two-stage database like this:

### Technical issues

an approval process created by  Torben Gjerstad on 4 Oct 11

[new entry](#)

Project-wide issues are managed from this approval process. The Issues Approval process p

#### Approval Steps

##### Step

-  New
-  Closed

[new step](#) [access](#) [notification](#) [custom fields](#)

[select all](#) [copy link](#) [delete](#) [!\[\]\(646a0208e347b1bb57cd3819f48da9ae\_img.jpg\) mark read](#) [!\[\]\(7cfa40fb4c94954922f718d7f34fc1b7\_img.jpg\) mark unread](#) [!\[\]\(d81c12f1b9dd9a88ccd55d37ff98c570\_img.jpg\)](#)

#### All Entries

	Title	Issue No.
---	-------	-----------

-  A third problem 1
-  Another problem 1
-  Electrical shortcut issue 1

[new entry](#) [print view](#) [access](#) [notification](#) [export](#) [import](#)

[select all](#) [cut](#) [copy](#) [copy link](#) [delete](#) [!\[\]\(93c02a4c5e106c1ff858f3309b288264\_img.jpg\) mark read](#) [!\[\]\(aa7aedaccd31046e4f6c4670f0d327ff\_img.jpg\) mark unread](#) [!\[\]\(601e11a5678e1d4ed64334b37b97bd06\_img.jpg\)](#)

Here you can see that one issue remain open and one have been concluded. You can also group issues

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by whether they were created in a meeting, outside a meeting, who created the issue, who is responsible, and deadlines. You can view the discussion and any attached documents by opening the issue.

## Electrical shortcut issue

a database entry created by  Torben Gjerstad on 4 Oct 11

summary	
Title	Electrical shortcut issue
Issue No.	1
Submitted By	Torben Gjerstad
Assigned To	Margrethe Alnes - JOINT
Description	Solved
Discussion	<a href="#">add a comment</a> <a href="#">take a vote</a>
Resolved	<a href="#">approve</a> <a href="#">reject</a>
Attachments	<a href="#">△ Name</a>  <a href="#">create</a> <a href="#">add file</a> <a href="#">access</a> <a href="#">notification</a> <a href="#">custom fields</a> <a href="#">select all</a> <a href="#">cut</a> <a href="#">copy</a> <a href="#">copy link</a> <a href="#">paste</a> <a href="#">delete</a> <a href="#">▶</a>

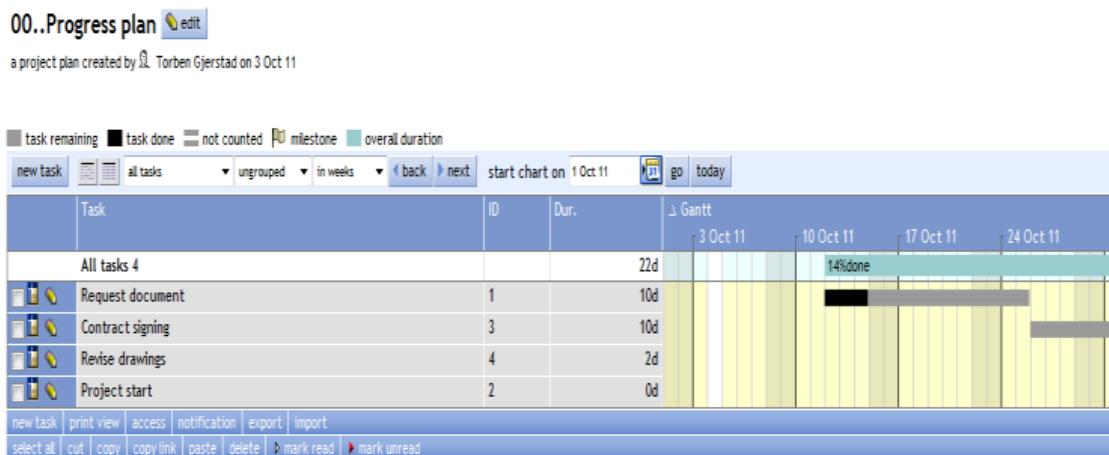
Creating a database is easy, but explaining how to do it is not simple because there are so many options – you can create everything from simple address list databases to multi-stage document approval databases. Explore the options by clicking [create], selecting “Database”, and then following the instructions you are given.



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## Planning tasks in the project with status reporting

eRoom has a separate project plan module that can display tasks with their statuses, resources, dependencies, and Gantt displays. Plans are useful in those circumstances where you think MS Project is more than you need, and if the project is not going to last for more than 6-12 months. You can also ask the owners of tasks to provide status reports so that you can see their progress, and add documents and comments to each task, as shown in the example below.

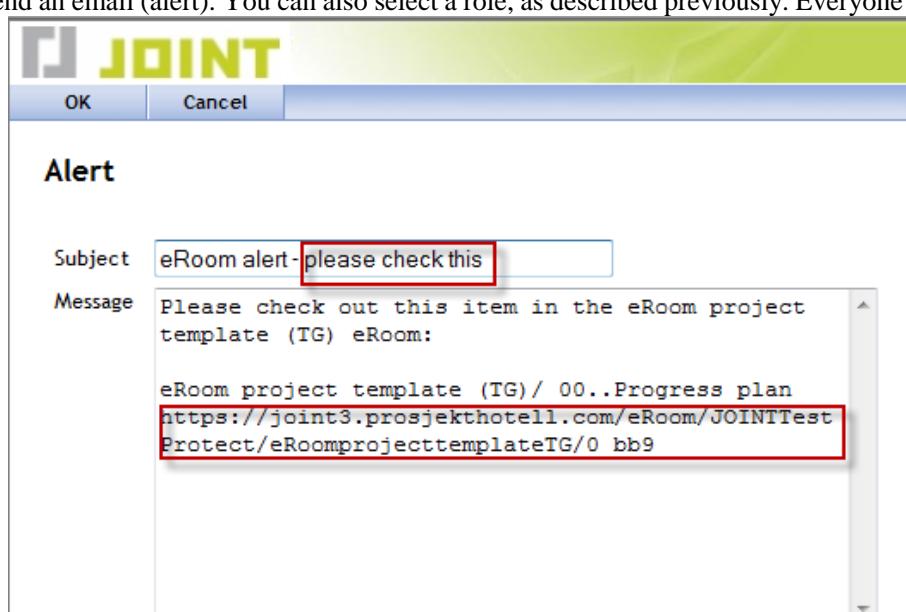


## Sending emails from eRoom and alerting others about something

When you are working in eRoom, one major advantage is that you do not have to logout of eRoom to send an email to the project participants. Instead one uses the [alert] button, .

If you click this button, a list of members is displayed and you can select one or more participants to whom you want to send an email (alert). You can also select a role, as described previously. Everyone with this role will receive the email.

After you have selected the names you wish to contact, click [OK] and the following window will be displayed:



eRoom retrieves the URL (web address) of the place you are in when you send the alert. In this way

the users receive a link in their email and can click on this to go directly to where, for example, the document is stored in eRoom.

The "Subject" field can be edited and we recommend that you add a bit more about what the email is

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about, as shown above. You can also write text in the “Message” field if you want to provide the recipients with some more information. If you want to, you can also delete everything in both the “Subject” and “Message” fields and write ordinary text (like in an ordinary email). The advantage is that you do not need to logout of eRoom or retrieve email addresses.

The recipients will receive the alert like an ordinary email (in Outlook/notes, etc) in their inbox. You as the sender will receive a copy of it in your usual inbox. No alerts will be saved in eRoom.

## Can you save emails directly into eRoom?

Yes, you can! We recommend that project participants using eRoom minimize their use of ordinary emails with attachments and discussions by working directly in eRoom with discussions and clarifications, etc. However, there will still be many emails to and from external sources (non- eRoom participants) and many will want to save these emails so that they are more easily accessible by others.

You can do this in two ways:

- 1) If you use Outlook, you can drag and drop an email into eRoom (assuming that you are using the plug-in). You can, for example, create a folder or several folders in eRoom in which you can save these emails. These are saved as MSG files, and are reopened in Outlook when you click on them.
- 2) You can create an email inbox in eRoom (or more than one) which you can forward emails to. These will then be saved in eRoom format so that everyone can open them (i.e. they are not reopened in any other application). Any attachments will also be added.

**12..Project inbox** 

an inbox created by  Torben Gjerstad on 3 Oct 11

The email address of this inbox is:  
[torbensProject@joint.prosjekthotell.com](mailto:torbensProject@joint.prosjekthotell.com)

Name	Modified	Owner
 4-weeks plan 	4 Oct 11 2:55pm	Torben Gjerstad
 Invitation to the eRoom project.msg 	4 Oct 11 2:55pm	Torben Gjerstad

[create](#) [add file](#) [access](#) [notification](#) [custom fields](#)  
[select all](#) [cut](#) [copy](#) [copy link](#) [paste](#) [delete](#) [mark read](#) [mark unread](#)    

Creating an inbox: click [create] where you want the inbox (in a folder for example) and click the

inbox icon:  You can give the inbox any name you want and choose an address in front of the @ sign.

### Edit Inbox

Edit the name, email address, and description of this inbox.

Name

Address  @joint.prosjekthotell.com

Description

Trebuchet MS  10              

Include space for comments and votes

# JOINT Collaboration

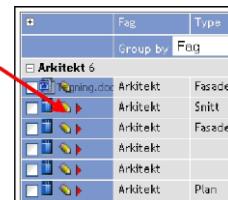
## How can I see what is new in the project?

It is important to know how to keep yourself up-to-date regarding what is new in your project eRoom. By default everyone who has logged in will receive a nightly email, an ‘eRoom report’.

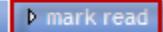
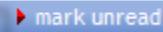
The screenshot shows a report titled 'reportingtechnicalcoduments eRoom report, 3 Oct 11'. It includes sections for 'Overall status' and 'New Information and Changes'. The 'New Information and Changes' section is divided into two parts: '10. Operations & Maintenance (00): All documents' and 'DocumentList'. The 'All documents' part lists several items with their status (e.g., 'new entry', 'changed entry') and author ('(Site Administrator)'). The 'DocumentList' part shows a list of CSV files with their status and author. At the bottom, a note says 'This report was generated automatically by EMC eRoom.'

This report contains information about what has happened in the eRoom since the night before. Here you can see who has done what; whether, for example, a new file has been added, new comments, etc. The email is clickable, i.e. if you want to view something in the report you are interested in reading, you can click the email and go directly to the information you want (via logging in/password). You will not be able to view information you do not have access to.

In addition to the eRoom report you will also be able to stay up-to-date via the red arrows - everything with a red arrow next to it is new (unread) to you. If you want to, you can remove all the red arrows by clicking [mark read] on the front page of the eRoom (remove all red arrows), or in a folder:



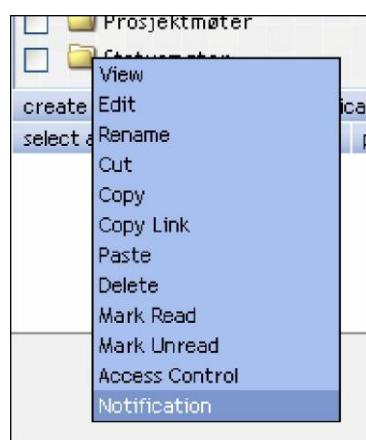
You can also choose not to

[notification](#) | [export](#) | [import](#)  
[delete](#)  

receive the eRoom report.

This is done by right clicking on an item/icon in eRoom and selecting “Notification”. Here you can choose whether or not to receive the nightly email.

You can also “Subscribe” to alerts from areas in the eRoom that you want faster alerts from (right click the item and select “Notification”).



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For example, you may have started a discussion that you want rapid feedback from. Another example is if you are waiting for a monthly report. By selecting “As soon as each change happens” from these areas, you will receive an email in your Outlook inbox as soon as anything changes.

<b>Rapporter</b>	<b>Notification</b>
In addition to a nightly summary of all changes in the eRoom:	
<input type="radio"/> No	
<input checked="" type="radio"/> Yes, as soon as each change happens	
<input type="radio"/> Yes, nightly	
 <b>(1)</b> <input type="checkbox"/> Send a nightly summary of all changes in the eRoom	
<input checked="" type="checkbox"/> Send my notification emails in HTML format	

In the example above we have chosen not to receive the nightly report (1), and instead chosen to receive alerts when something changes in the folder “Rapporter” (2).

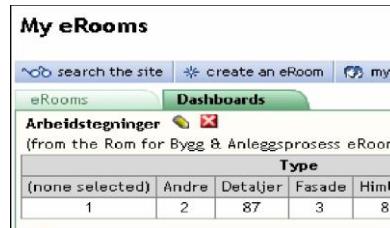
## Using Dashboards – collect information from your project(s) (new in V7.43)

Dashboard can provide an overview of the contents of a database (summary of for example, number of posts/entries of a selected type) or you can collate information from several similar databases (from the same or different eRooms) such that you can more easily gain access to information. Such dashboards can be displayed in the same place as a database, in an eRoom or on your My eRooms page.

To create a dashboard from a database (e.g. a drawings database for those who have one), you can right click the database icon and select [edit] (can only be done if you are a coordinator, or created the database yourself). Thereafter select “Change the dashboard options”. Tick the various selections you want to collate in a dashboard and click [OK]. For example, a dashboard for a drawings database may look like this:

step	total rows	Type					Trade			Scale		
		(none selected)	Ceiling	Details	Facade	Schema	(none selected)	Ark	RIB	(none selected)	1:100	As shown
Approved	2	0	1	--	1	--	0	1	1	0	2	--
Design draft	2	1	--	1	--	--	1	1	--	2	--	--
IDC	2	0	--	--	1	1	0	1	1	1	--	1
	6	1	1	1	2	1	1	3	2	3	2	1

Here all the ceiling drawings, architect drawings, etc are summarized. You can click on the number to bring up the drawings that belong to this group. This dashboard can also be displayed in My eRooms if you want: right click the database and select “Notification”. Tick “Summarize this database in My eRooms”.

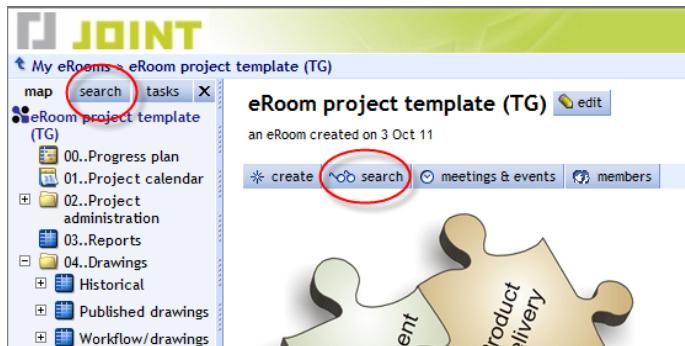


If you want to create separate freestanding dashboards, you can click [create] and select . Here you can select which databases or calendars you want to collate information from.

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## Searching for information in your project eRoom

It is easy to find information available in your eRoom. eRoom indexes all words so that your search looks in documents (including PDF text documents), discussions, etc. You will find the [search] button on the eRoom's front page, or as a tag above the menu on the left-hand side of the screen:



Below you will see an example search result:

You can easily see where the various documents, etc, can be found in the eRoom, and you can simply click on what you want and you will go directly there (or the document will open if it is a file).

You can also search across the eRooms you are a member of. You do this by using the [search the site] button located in My eRooms.

A screenshot of the 'search the site' interface. At the top, there is a search bar with 'search the site' and a search icon. Below the search bar is a 'Search for:' section with fields for 'Text' (containing '\*rutiner'), 'Date' (set to 'any'), and 'Owner' (set to 'Any'). There is also a checkbox for 'Unread Items Only'. Below this is a 'Search' button and a 'Tips' link. The main area shows a table of search results. The columns are 'Rank', 'Name', 'Modified', 'Owner', and 'Found In'. The results are as follows:

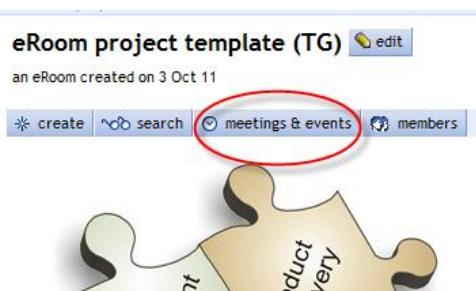
Rank	Name	Modified	Owner	Found In
1	KS-rutiner - Kap. 8.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
2	KS-rutiner - Kap. 2.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
3	KS-rutiner - Kap.3.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
4	KS-rutiner - Kap.4.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
5	KS-rutiner - Kap. 5.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
6	KS-rutiner - Kap. 6.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
7	KS-rutiner - Kap. 7.pdf	11 okt 05 00:19	Cathrine Storm	06..KS-manual
8	Erstatninger-kravspk-ver-2.doc	8 des 05 12:30	Cathrine Storm	Maler
9	Møte 4.doc	8 des 05 12:30	Cathrine Storm	Prosjektmøter
10	Utarbeidelse av plassrutiner	29 nov 05 10:11		03..Saker/oppgaver: Avsluttet

# JOINT Collaboration

## Share your PC's desktop or documents with others in real time

Sometimes it is useful to be able to see the same thing as, for example, the person you are talking to on the telephone, e.g. a drawing, so that you can discuss changes, etc. With eRoom's real time functionality you have the opportunity to share your own PC's desktop, and thus easily retrieve documents, etc., that the other person (people) want to view on their desktop(s).

To start such an eRoom meeting simply click the [meetings & events] button on the front page of the eRoom:



The screenshot shows the eRoom project template (TG) interface. At the top left, there is a title bar with the text "eRoom project template (TG)" and a "edit" button. Below the title bar, there is a banner stating "an eRoom created on 3 Oct 11". Below the banner, there is a navigation bar with four buttons: "create", "search", "meetings & events" (which is circled in red), and "members". To the right of the navigation bar, there is a large puzzle piece graphic with the word "productivity" written on it. On the far right of the navigation bar, there is a "help" button.

**Create Meeting**

Pick a title for this meeting.  
Instant Meeting

Hide this meeting from non-participants

Pick the participants for this meeting. To include non-members, enter their email addresses here.

eRoom members: Torben Gjerstad

Non-members:

How do you want to send the alert for this meeting?

By email  
 Do not send an alert (Non-members will not be able to participate)

Subject: eRoom Meeting In Progress: (MeetingName)

Message: Please join me now in the eRoom project template (TG) eRoom for this real-time meeting.

You pick the participants from the list of members and/or add email addresses and click [OK] at the top. This will start the 'meeting' and a 'meeting room' will open. The participants will receive an email with a link to this 'meeting'. Once they have arrived in the meeting, you will see their names in your 'meeting room'. One major advantage of this is that you can also invite non-eRoom members!

To share your desktop simply click [share desktop] and everyone else will see your desktop on their desktop. You can now retrieve the documents you want to share/view together with others and move around your desktop.

Instead of sharing your desktop, you can also retrieve documents from eRoom and share these online with your participants. You can grant access to one person at a time, and watch them edit the document. Once everyone has finished adding their changes, the document can be saved directly back into eRoom.

# JOINT Collaboration

## Support

If you are a client of JOINT, either a JOINT ProsjektHotell client or because JOINT operates your eRoom licences, you have access to free support/user support via telephone or email on all work days between 08:00-16:00 (GMT +1).

Click **Support** in the top right-hand corner of the eRoom and you will go directly to our support side with advice and FAQs.

Click **?** to get help from eRoom's own help file.

Telephone Support: (+47) 22 50 45 50 (press 2)

Email: [support@joint.no](mailto:support@joint.no)

