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Q&A 2.0 Manual

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1.0 About Q&A

The Q&A module provides SmartRoom users with an efficient and, above all, confidential communication medium to assist in the document review process.

This module allows complete flexibility as it relates to the setup of individual Q&A Groups and the flow of communication to multiple parties.

With the addition of Moderators and Subject Matter Experts, each group can designate a Q&A Group user that can manage, approve, and/or reject messages based on merit or relevance.

They will also receive a more poignant response for specific question types that have been assigned a Subject Matter Expert.

The following document outlines all of the details of the Q&A module including setup and best practices.

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2.0 Q&A Messages

The Q&A Messages page is very similar to an email inbox. Users have the ability to manage messages as they see fit. All columns are sortable and any message can be moved into its own folder.
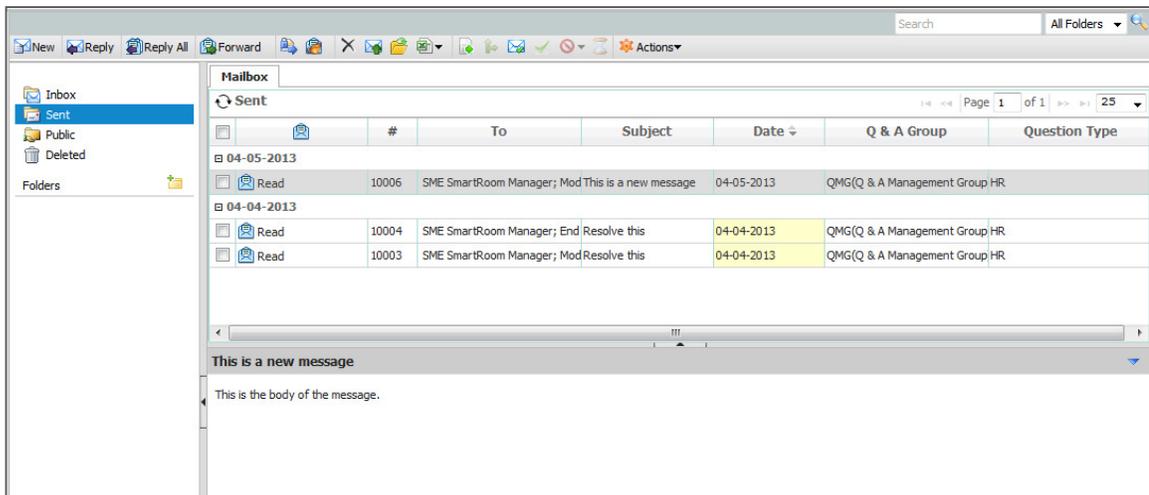
Each user is provided with 4 standard folders as shown. They also have the ability to create their own personal folders for easier message sorting and organization.

2.1 Icons

Below is an outline of all of the icons and their associated functions available within the Q&A Messages window.

Please note that some of the items will only be available depending on your status as a Q&A Group member or the type of message selected.

New – Creates a new message

Reply – Replies to only the sending user of the message

Reply All – Replies to all parties listed on the message

Forward – Forwards the message, with or without history, to any parties the user is allowed to communicate with.

Restrict Forward – Forwards the message to any parties while removing sensitive information such as usernames and Q&A Group names.

New Public – Allows the creation of a public message that can be sent to all Q&A Group users.

Delete – Deletes selected message(s).

Recall – Allows user to recall a sent message so that the content is no longer accessible. The message will still show up in other users' inboxes but the content will be unavailable.

Move to – Allows messages to be moved to any specific folder, including custom folders.

Export – Allows all of the messages in the active folder to be exported to Excel 2003 or 2007. Users can also choose to include the history of each message within the export.

Claim – Reserved for Subject Matter Experts and Moderators, this option determines who is taking ownership of a message.

Reroute – This function allows Moderators to change the question type of a given message.

Resolve – Necessary for workflow purposes, this function allows users to mark a question resolved.

Approve – Used by Moderators, allows a message to pass moderation and be sent to the intended recipient(s).

Reject – Used by Moderators, allows messages to be rejected in the event that they are not relevant or that the topic has already been discussed.

Hold – For informational purposes only, places a "hold" classification on the message.

Actions – This dropdown carries several administrative options that allow users to better manage messages.

2.2 Columns

The Q&A messages section carries several columns which are outlined below in detail.

(status) – This column provides an icon as well as text describing the current state of each message. There are several unique statuses that are available to better assist in the tracking of a message from submission to resolution.

- This column represents the unique question number associated with each message. Any time a new message is created or forwarded, a new question number will be assigned to it for easier tracking and sorting.

From – This field represents who the message was sent from.

Subject – This column provides the subject of each message.

Date – Represents the date that the message was received or sent.

Question Type – Displays the question type associated with each message.

Claim – Denotes who has claimed a message.

2.3 Folders

As previously mentioned, there are 4 default folders available to all Q&A Group users; each one is outlined below in detail.

Inbox – This is the root directory where all standard messages are received and stored.

Sent – This folder shows any messages that the user has sent.

Public – This folder will contain any public messages.

Deleted – This folder contains all deleted messages.

In addition to the above users can add custom, editable folders by selecting the "Add Folder" icon shown here:

Users can further manipulate these folders by right-clicking them and reviewing the available menu items.

Messages can be added to these folders by selecting the necessary message(s) and then selecting the "Move To" option.

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2.4 Sending a Message

Sending a message within Q&A is very similar to sending an email.
To do so, follow the below protocol:

1) Select the "New" button.
2) Select the question type from the "Question Type" dropdown
   option.
3) Once you've selected the question type the "To" button will
   become available. Once clicked, you will be able to select the
   necessary recipient(s).
4) From there you simply need to enter in the subject and
   content of the message.
5) You may also choose to add a reference or an attachment.
   a. An attachment is a file that is not on the SmartRoom
      that must be uploaded.
   b. A reference is a link to a corresponding file within the
      SmartRoom.
6) Once all of the necessary fields have been populated, click
   send.
7) You will now see your message in the "Sent" folder.

3.0 Q&A Alerts

Q&A Alerts are generated any time that a change takes place on a message. Once a change occurs, users will receive an alert that contains the basic information of the affected message.

Below is an example of what a Q&A alert looks like.

The next section outlines the two types of alerts that are available; personal and standing.

3.1 Personal Alerts

As the label implies, personal alerts are alerts that only individual users can enable, manage, and receive.

There are 3 options associated with personal alerts:

Enable Personal Q&A Alerts – This will turn on or off personal alerts.

Alert Frequency – This function determines when alerts will be sent. Daily alerts are sent each evening at Midnight EST. Hourly alerts are sent within one hour of a change. Immediate alerts are generated within 15 minutes of a change.

Consolidate – When enabled, this function will "consolidate" all alerts into one email. Inversely, when this function is disabled users will receive an email for each alert.
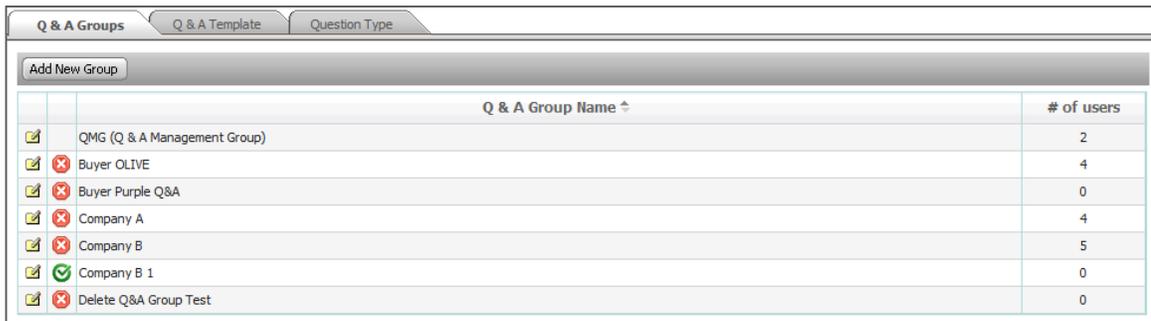
It is a best practice to have "Consolidate" enabled thereby avoiding multiple unnecessary emails.

3.2 Standing Alerts

Standing alerts can be set up and managed by SmartRoom Managers only. These alerts can be set up so that all Q&A Group users receive them or, if preferred, only specific users receive them.

The configurable options for standing alerts are similar to personal alerts. These options are outlined below:

Create New Alert – Selecting this button will provide a pop-up carrying the below options.

Alert Frequency – This function determines when alerts will be sent. Daily alerts are sent each evening at Midnight EST. Hourly alerts are sent within one hour of a triggering action. Immediate alerts are generated within 15 minutes.

Consolidate – When enabled, this function will "consolidate" all alerts into one email. Inversely, when this function is disabled users will receive an email for each alert.

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4.0 Q&A Management

The Q&A Management menu provides Q&A Management members the ability to manage any and all Q&A Groups, Templates, and Question Types.

Each tab is explained, in detail, in the following sections.

4.1 Q&A Groups

The Q&A Groups tab is where all Q&A Group management takes place.

A list of all existing Q&A Groups and the number of users associated with them is provided along with the ability to "Add New Group".

Existing Q&A Groups can be edited by selecting the ☑ icon next to each Q&A Group Name.

Q&A Groups can also be activated or deactivated by toggling the ⊗ icon.

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4.1.1 Creating/Editing Q&A Groups

In order to create a new Q&A Group, simply select the "Add New Group" button shown at the top of the Q&A Groups list.

Once selected, you will be provided with the following page:
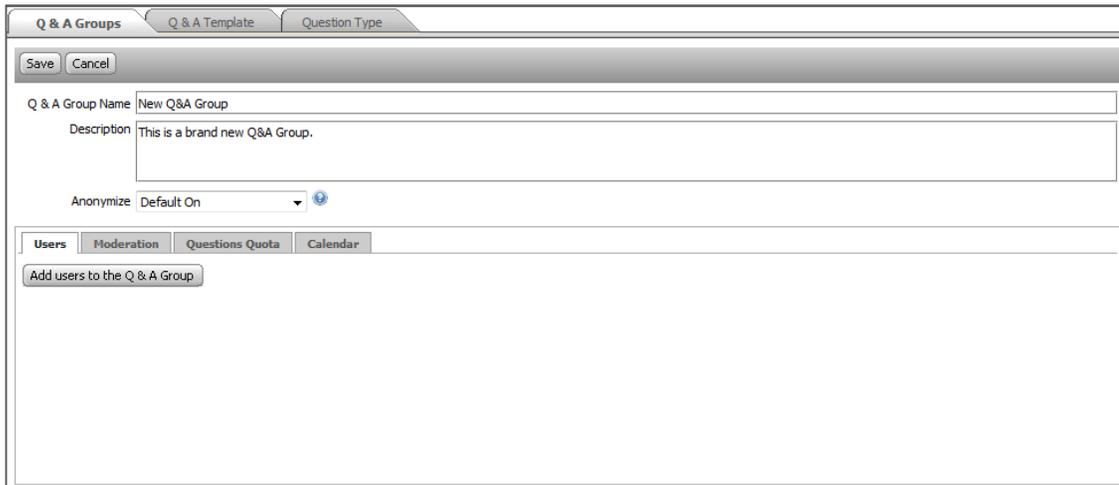
Here you will be able to add users, assign Moderators, Subject Matter Experts (SME) and Group Leaders as well as configure moderation, question quotas, and the Q&A Calendar.

You can also determine the default status for "Anonymize".

Anonymize is a function that will mask specific users names when submitting or responding to questions to ensure anonymity and confidentiality.

4.1.2 Adding Users

To assign users, select the "Add users to the Q&A Group" button from the "Users" tab. You will then be provided a list of all SmartRoom users that do not already belong to a Q&A Group.

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It is important to only assign users of the same party to a Q&A Group because users of the same Q&A Group can view each other's usernames and freely communicate amongst themselves.

4.1.3 Assigning Q&A Group Roles

Once you've added users to the Q&A Group you can begin assigning them to specific roles within the group by selecting the edit icon ✎ next to each user's name.

Each user can be assigned to a role based on question type as shown below.

Below is an outline of the different roles a user can be assigned to within the Q&A Group.

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Leader – Anyone that is designated a Q&A Group Leader will have the ability to manage Moderator and Subject Matter Expert (SME) assignments within their own Q&A Group.

Moderator – A Q&A Group Moderator is a user that must approve or reject any inbound or outbound messages for the Q&A Group.
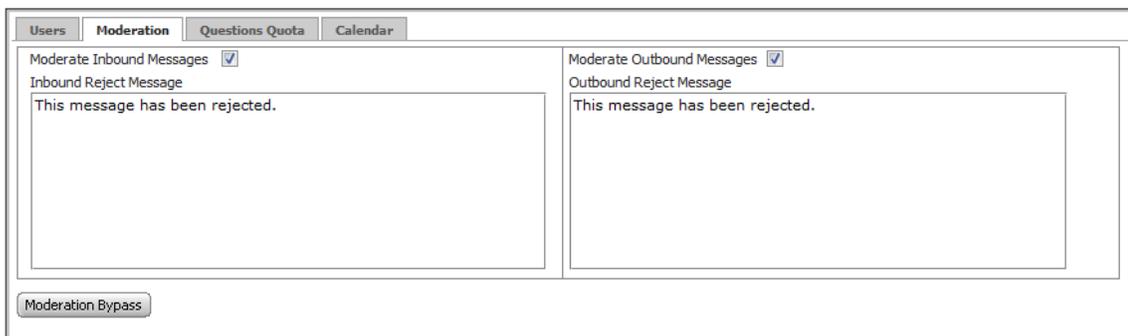
Inbound messages are messages that are coming "in" to a Q&A Group. Inversely, outbound messages are any messages that are being sent "out" from a group.

Moderators exist to manage the flow of information and increase the overall efficiency of the Q&A process.

Subject Matter Experts (SME) – SMEs exist so that users with specific knowledge about a question type can automatically be routed questions of that type without the need for a Moderator or standard user to have to send it to them directly.

4.1.4 Moderation

Once users have been added and assigned their roles, you will need to determine if moderation should be enabled or disabled, both for inbound and outbound messages. This can be done under the moderation tab shown below.

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If "Moderate Inbound/Outbound Messages" is unchecked there will be no moderation for any messages received or sent by the Q&A Group.

If moderation is enabled, default text for rejected messages must be added so that in the event a message is rejected users are notified appropriately.

In the event that you wish moderation to be disabled for certain question types; you can do so by selecting the "Moderation Bypass" button.

Select Question Types to Bypass Moderation		✖
Question Type ⇕	Bypass Inbound	Bypass Outbound
	☐	☐
Finance	☐	☐
HR	☐	☐
Intellectual Property	☐	☐
Sales	☐	☐
Tech	☐	☐

Close

Here you can pick and choose which question types should not be moderated.

4.1.5 Question Quotas

Once moderation has been set up, you can set the question quotas associated with each question type. This can be done from the "Question Quotas" tab shown below.

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Question Type ⬍	Max # of Questions	Question Count
Finance	-1	1
HR	-1	2
Intellectual Property	-1	2
Sales	-1	0
Tech	-1	0

Max # of Questions -1   -1: Unlimited, 0: No questions can be asked.

Here you can set the number of available submissions per question type. If you do not require a question quota, please enter -1 to allow for unlimited submission.

Once a Q&A Group reaches their question quota they will no longer be able to submit questions of that specific type.

4.1.6 Q&A Group Calendar

The Calendar function allows you to enable Q&A only during specific time periods. You can configure the calendar from the "Calendar" tab shown below.

To bypass the calendar function, you can select "At All Times" from the drop down menu.

Should you wish for this group to only be able to submit questions during a specific period, you will simply select "Add New Q&A Period" and then select the date range you prefer.

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This will ensure that messages can only be submitted during a specific time frame.

Once you've adjusted all of the necessary items for each Q&A Group you must select "Save" in order to apply the changes.

4.2 Q&A Template

The Q&A Template exists to make the creation of Q&A Groups more efficient. Any time a new Q&A Group is created the settings of the new group will default to what is set within the Q&A Template.

This allows for multiple Q&A Groups to be quickly created with the desired setup without having to go in and edit each one individually.

It is a best practice to set the Q&A Template first before beginning the creation of Q&A Groups.

The "Global Reset" button allows you to reset the current question counts for all Q&A Groups.

All of the other functions shown in the above are outlined in detail in section 4.1. Please refer to that section for further information.

4.3 Question Type

The "Question Type" tab displays a list of all of the existing question types and the number of SMEs assigned to each.

The list also provides options for editing the question types 📝 as well as the ability to activate ✅ or deactivate ❌ them.

You will be provided the below page when editing a question type.
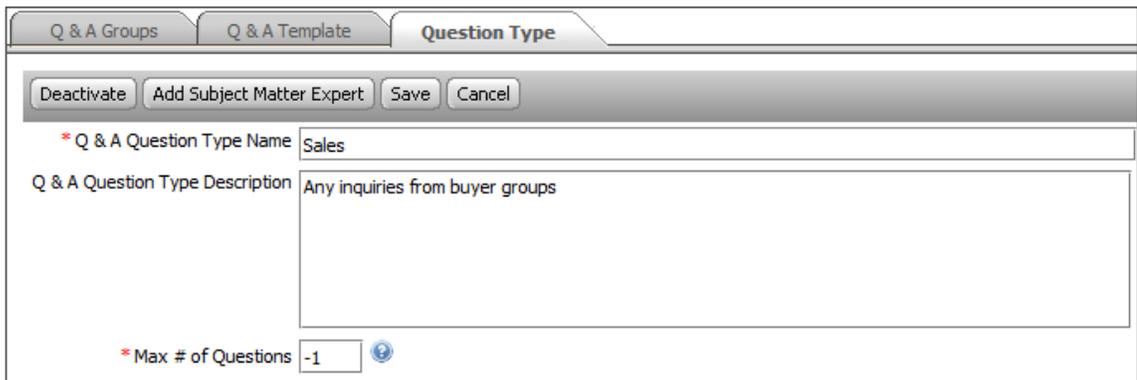
Here, you have the ability to change the name, description, and the default "Max # of Questions".

Buttons to deactivate/activate and add SMEs are also provided as shown.

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5.0 Q&A Reports

The two reports outlined below are available within the Reports > Activity menu under the "Q&A" tab. Only SmartRoom Managers have access to these reports.
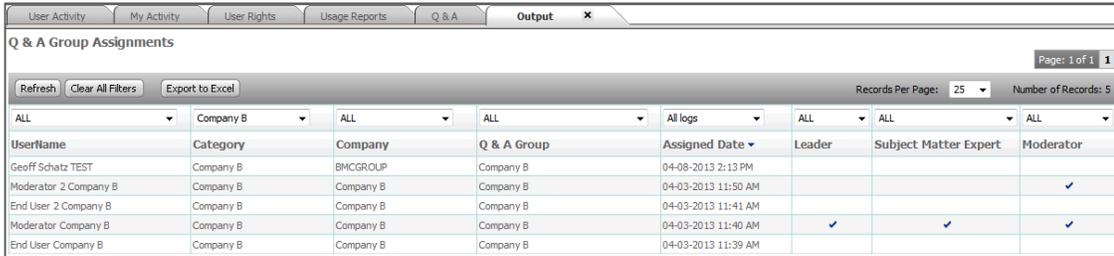
5.1 Q&A Group Management

The Q&A Group Management report provides details regarding the creation and set up of each Q&A Group.

As seen above, any event that occurs related to the management of any Q&A Group is recorded within this report.

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5.2 Q&A Group Assignments

The Q&A Group Assignments report provides details regarding each group's members and their current assignments.

Each column is filterable so that you can easily determine the assignments of each Q&A Group.

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6.0 Best Practices

The following section outlines a couple of best practices to use in order to maximize the effectiveness of the Q&A Module.

Of course these practices are all situational and may not fit into the exact Q&A setup that you require but it is important to note and understand the concepts associated with each practice.

Initial Setup – If you know what the standard setup is going to be for each Q&A Group and Question Type, it is important that you configure the Q&A Template and and Question Type sections before creating Q&A Groups.

This will lessen the setup time and ensure consistent configuration across all of the Q&A Groups.

Inbound/Outbound Moderation – For most situations it will be efficient to carry the following moderation setup:

For standard groups (SG), only outbound moderation should be enabled. This will ensure that any questions submitted to the Q&A Management Group (QMG) are reviewed appropriately and are relevant to the transaction at hand.

It will also help to open up communication from the QMG to Standard Groups due to the fact that inbound messages don't have to be moderated and can pass through directly to the necessary recipient.

For QMGs, it is a best practice that they only have inbound moderation enabled. Most QMG members do not need outbound messages moderated as they are cognizant of whom the responses are going to and are very knowledgeable with their responses, thus negating the need for outbound moderation.

Consolidate alerts with an appropriate frequency – Messages and questions are often updated multiple times and day so it is important that the alerts be set up with the "Consolidate" function enabled. This will ensure that users aren't bombarded with email alerts during high Q&A usage periods.

It is also necessary to setup the frequency to be either hourly or daily. Again, to avoid significant email alerts it is best to use a consolidated, hourly or daily alert.

For technical questions or concerns, please contact: SmartRoomSupport@bmcgroup.com

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