



**SmartRoom**<sup>™</sup>  
Powered by **bmcgroup**

Report Wizard

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# 1.0 About the Report Wizard

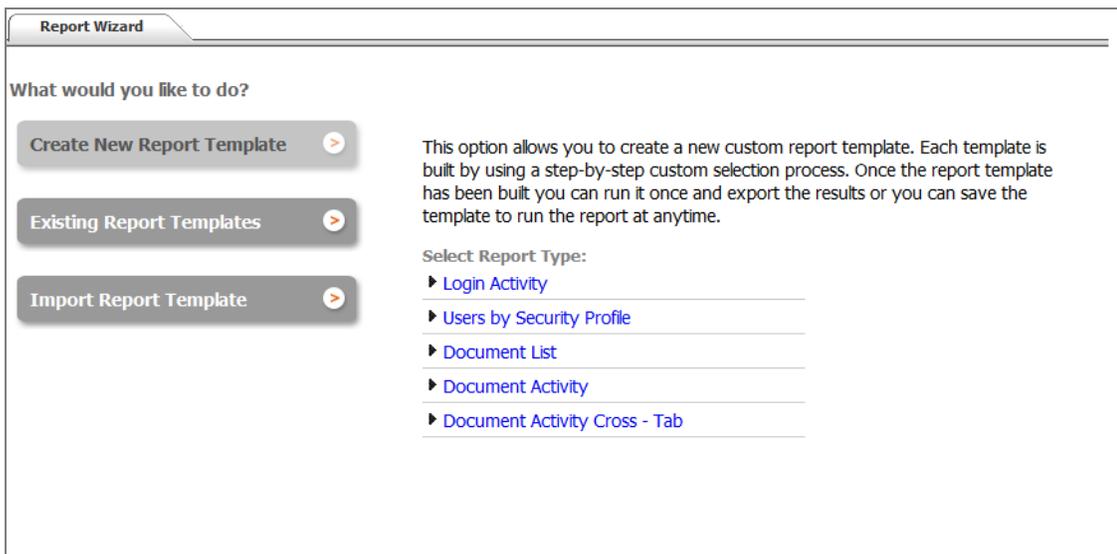
The Report Wizard is a tool contained within the SmartRoom that allows for the creation, distribution, and iteration of custom reports.

Based on a step-by-step criteria selection process, the Report Wizard has the ability to create a multitude of different, customized reports that can be run at any time on any SmartRoom™.

In the following pages you will find information on all of the different report types, how they function, and how to obtain and extract all of the pertinent information contained within your SmartRoom™.

## 2.0 Creating New Report Templates

The Report Wizard has five different report types as shown in the screenshot below. Each of these reports provides information on the different parts of the SmartRoom from usage to users to in-depth comparisons of all activities.



All of the reports provided within the Report Wizard can be exported to Excel for easy distribution by selecting the "Export to Excel" button located on the preview page.

Below is information about the five different report types, what they provide, and how to build each report effectively.

### 2.1 Login Activity

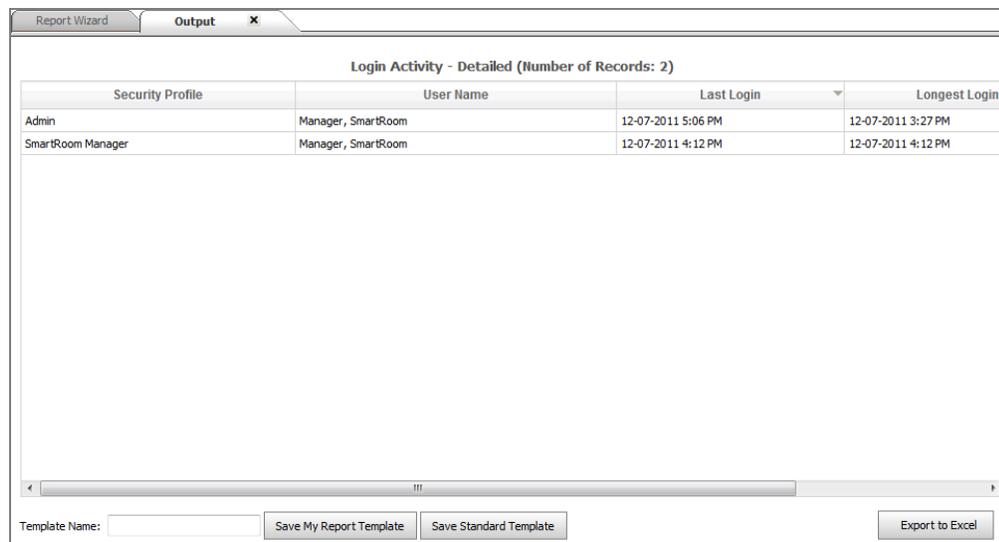
As denoted by its name, this report will provide login activity for any and all users that are or have been a part of the SmartRoom. This information can be displayed in a number of ways. Below are the steps necessary to build one of these reports.

After selecting “Login Activity” from the Create New Report Template selection, you will begin the step by step report creation process.

The “Login Activity” report has 5 custom selection steps.

The 1<sup>st</sup> step is to select what type of “Login Activity” report is preferred. There are three different types of reports:

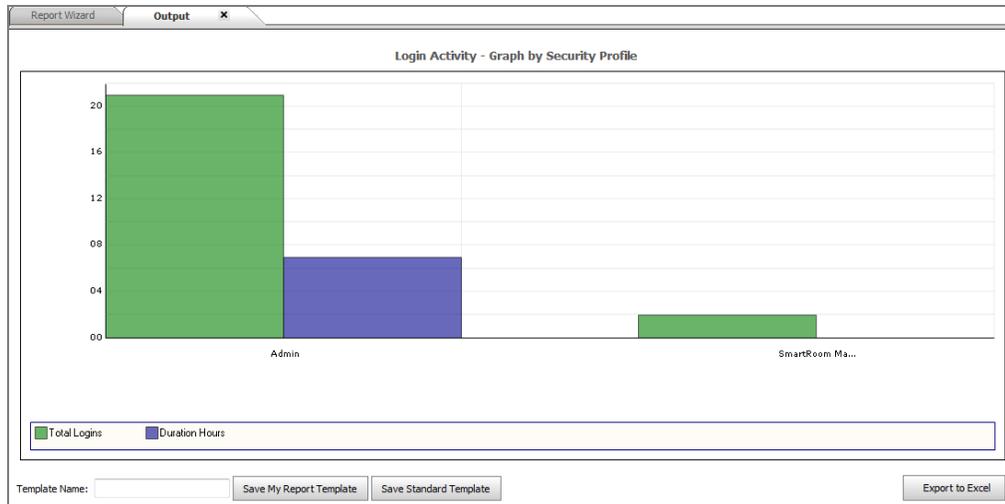
1) Detailed – Provides the raw data of each login record in a table format without any graphs, charts, or groupings. See below.



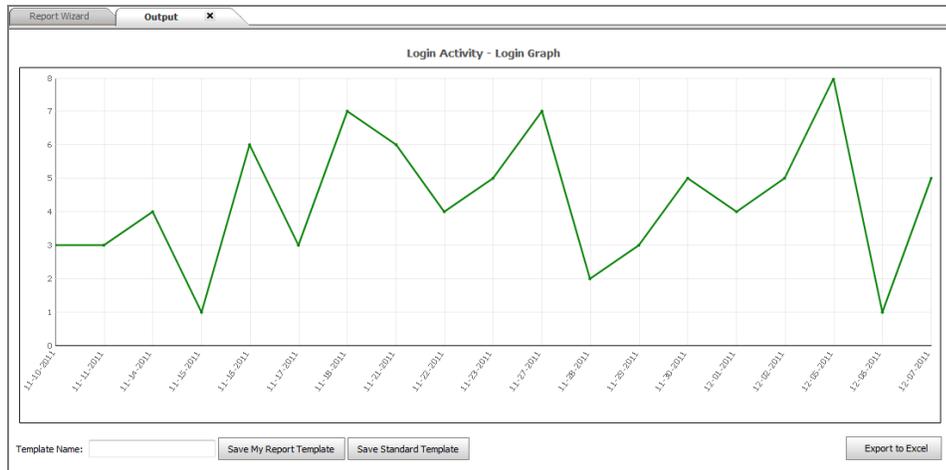
The screenshot shows a window titled "Report Wizard" with a sub-tab "Output". The main content area displays a table titled "Login Activity - Detailed (Number of Records: 2)". The table has four columns: "Security Profile", "User Name", "Last Login", and "Longest Login". There are two rows of data. Below the table, there is a "Template Name:" field and three buttons: "Save My Report Template", "Save Standard Template", and "Export to Excel".

Security Profile	User Name	Last Login	Longest Login
Admin	Manager, SmartRoom	12-07-2011 5:06 PM	12-07-2011 3:27 PM
SmartRoom Manager	Manager, SmartRoom	12-07-2011 4:12 PM	12-07-2011 4:12 PM

2) Graph by Security Profile – This option will allow you to graphically display the amount of logins by each security profile. The provided example shows the output in a column graph.



3) Login Graph – Displays the amount of logins during the selected time period in a selected graph type. The provided example shows the output in a line graph.



The 2<sup>nd</sup> step is to select the date range the report should include. The available options are shown below. The time frames can be grouped as necessary using the “Group data by” selections while building a “Login Activity” report as well.

**Report Wizard**

### Login Activity

STEP 1 — 2 — 3 — 4 — 5

**Step 2 - Select Date Range:**

Today  
 Last 7 Days  
 Last 30 Days  
 Last 12 Months  
 Before  
 After  
 Between

Group data by:  
 Day  
 Week  
 Month  
 Quarter  
 Year

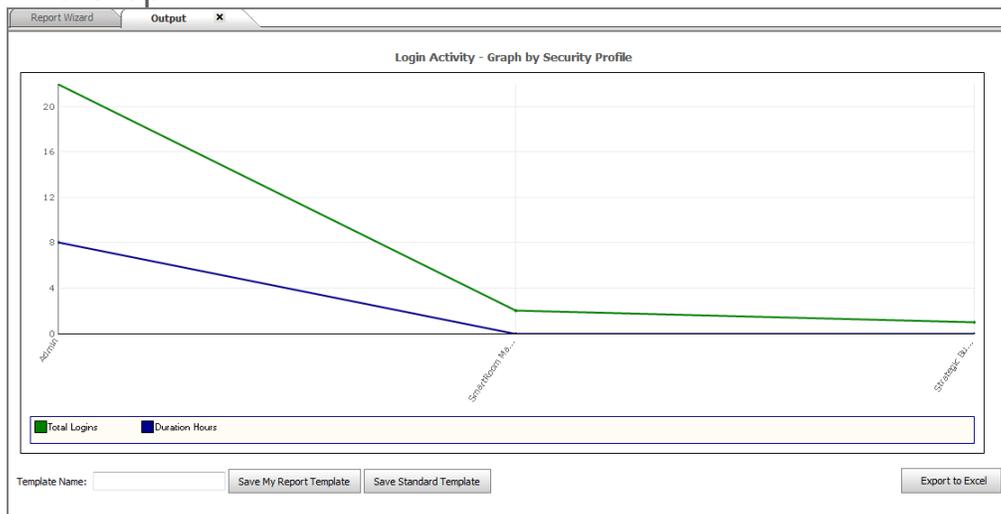
Cancel Back Next

The 3<sup>rd</sup> step only available when creating a “Detailed” report as selected in step 1. This step provides the option of including deleted users in the output.

Step 4 provides the different graph types available with the report type that has been selected in step 1. “Detailed” reports do not have access to this step as their output is raw data in table format.

“Graph by Security” can be displayed in any of the following graph output types:

### Line Graph



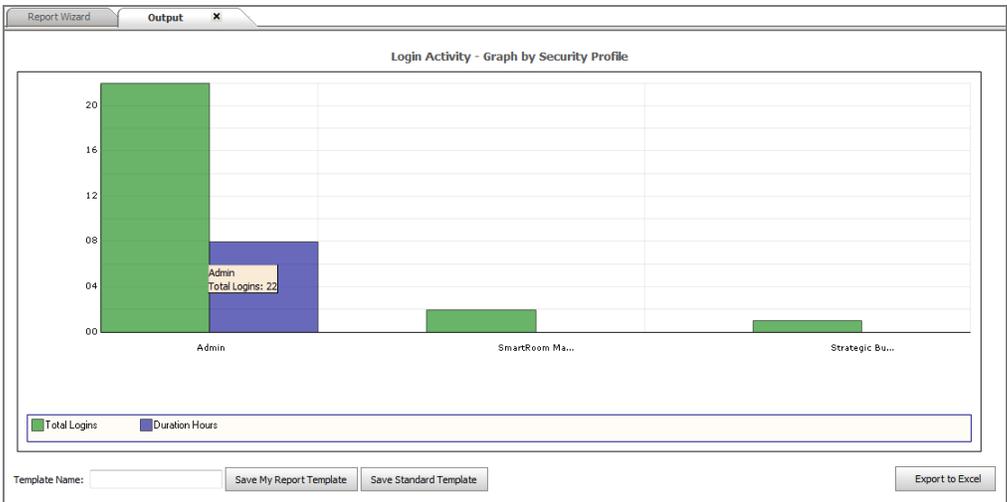
### Stacked Bar Chart



## Area Chart

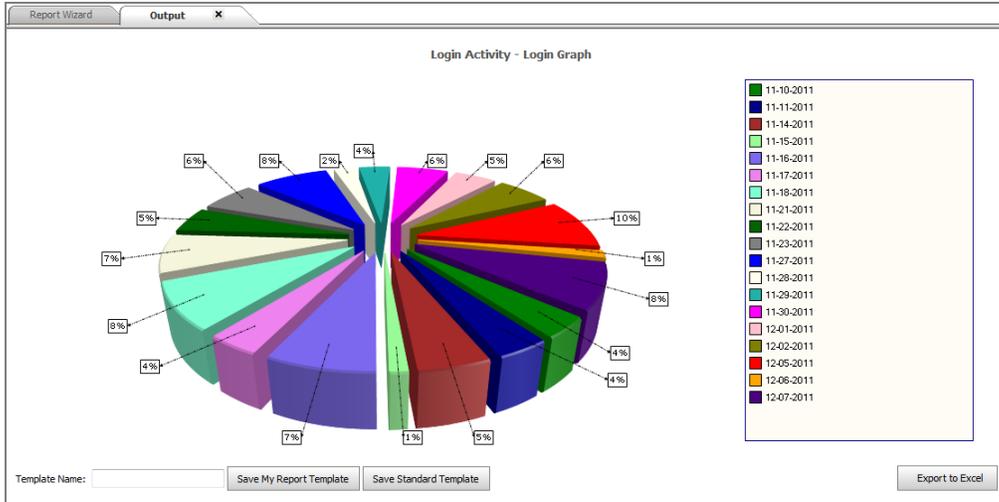


## Column Graph

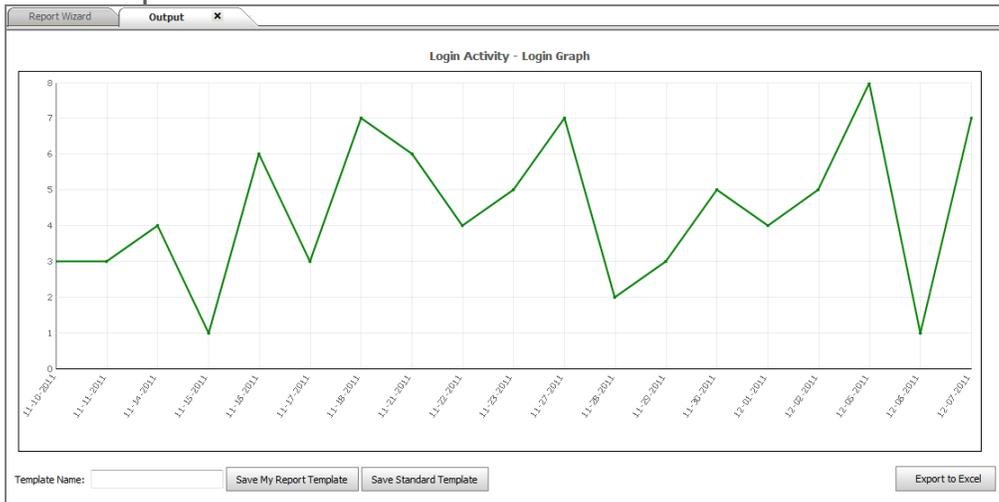


“Login Graph” reports have three output options available:

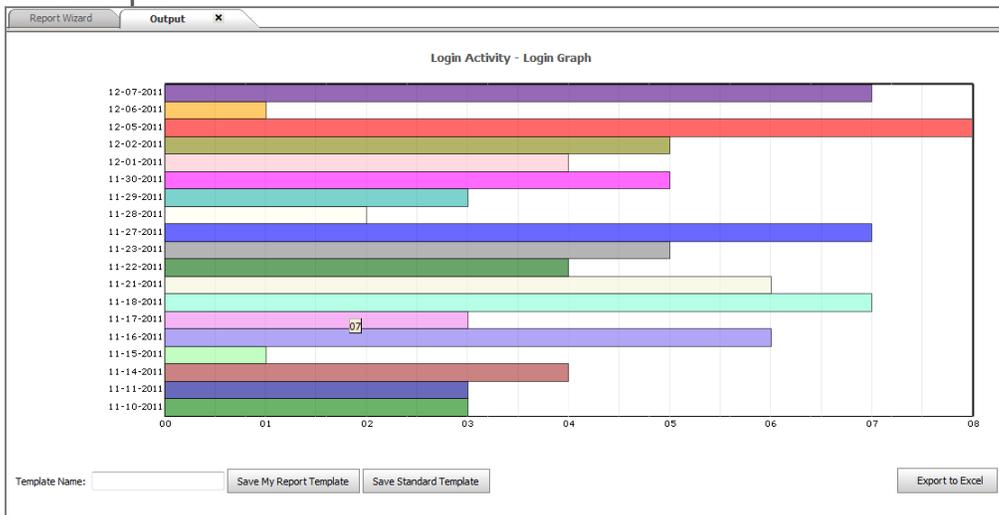
## Pie Chart



## Line Graph



## Bar Graph



The 5<sup>th</sup> step provides several options as it relates to the report that has just been created.

**Report Wizard** Output

**Login Activity**

STEP 1 2 3 4 5

Step 5 - Wizard Integrity Check:

Template Name:

Excel Version to be used when exported: 2003

Cancel Back Preview Save My Report Template Save Standard Template

**Summary:**

- Step 1.** Report Type: Login Graph
- Step 2.** Date: Last 30 Days  
Group By: Day
- Step 3.** Skipped, Not Applicable.
- Step 4.** Graph Type: Bar Graph

“Save My Report Template” will allow the report to be saved as a template so that it can be used at any time with the same criteria. A “Template Name” must be entered in order to save the report. “My Report” templates are available only to the user that created them.

“Save Standard Template” will allow the report to be saved in the same fashion but will be available to anyone that has access to the Report Wizard. This access is normally limited to SmartRoom Managers only.

“Preview” will provide the output as seen from the screenshots provided above. The preview page provides an option to export the current report so that it may be viewed in Excel as well.

The 5<sup>th</sup> and final step is the same as with all reports within the Report Wizard. The created report can be saved as a “My Report Template” or a “Standard Template”. A summary is also provided to ensure the output is accurate. Selecting “Preview” will display the results of the wizard to ensure the desired report is produced.

## 2.2 Users by Security Profile

Similar to the “Login Activity” reports, “Users by Security Profile” reports are built on a 5 step process. These reports will provide information about each user and security profile as it relates to the access they have within the SmartRoom.

The 1<sup>st</sup> step is to select the date range for the report. As with all reports within the Report Wizard, the below selections are available.



The screenshot shows a window titled "Report Wizard" with a sub-header "Users by Security Profile". Below the sub-header is a progress bar with five steps, where Step 1 is highlighted in green. Underneath, it says "Step 1 - Select Date Range:". There are seven radio button options: "Today" (selected), "Last 7 Days", "Last 30 Days", "Last 12 Months", "Before", "After", and "Between". At the bottom left, there are "Cancel" and "Next" buttons.

The 2<sup>nd</sup> step is to select which security profiles you wish to include.

Report Wizard

Users by Security Profile

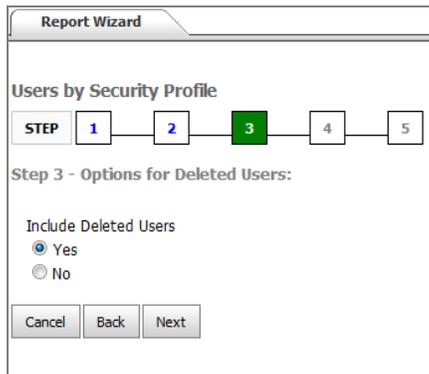
STEP 1 2 3 4 5

Step 2 - Select Security Profiles:

Active Only  
 Suspended  
 All

Cancel Back Next

The 3<sup>rd</sup> step is to determine if deleted users should be included.



Report Wizard

Users by Security Profile

STEP 1 2 3 4 5

Step 3 - Options for Deleted Users:

Include Deleted Users

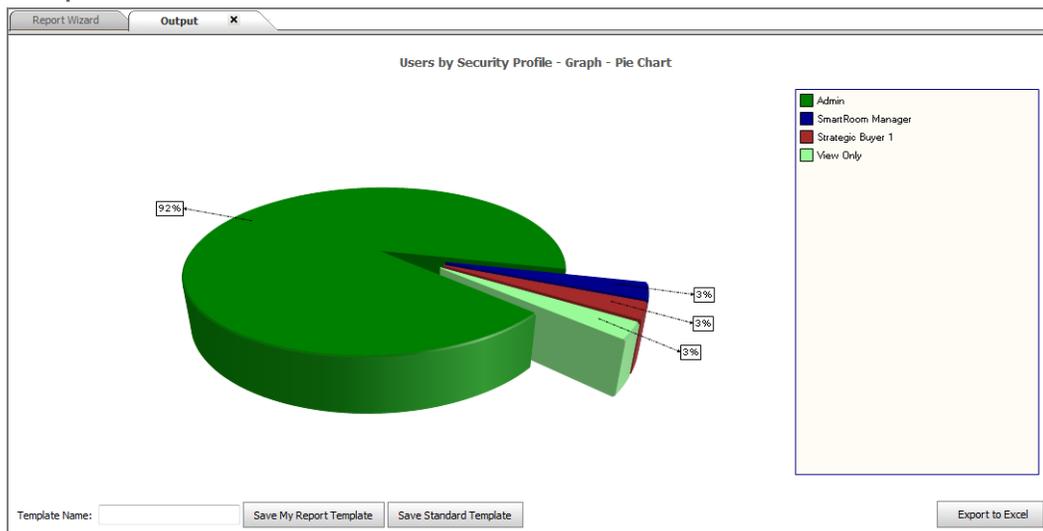
Yes

No

Cancel Back Next

The 4<sup>th</sup> step provides all of the available output display options.

### Graph – Pie Chart



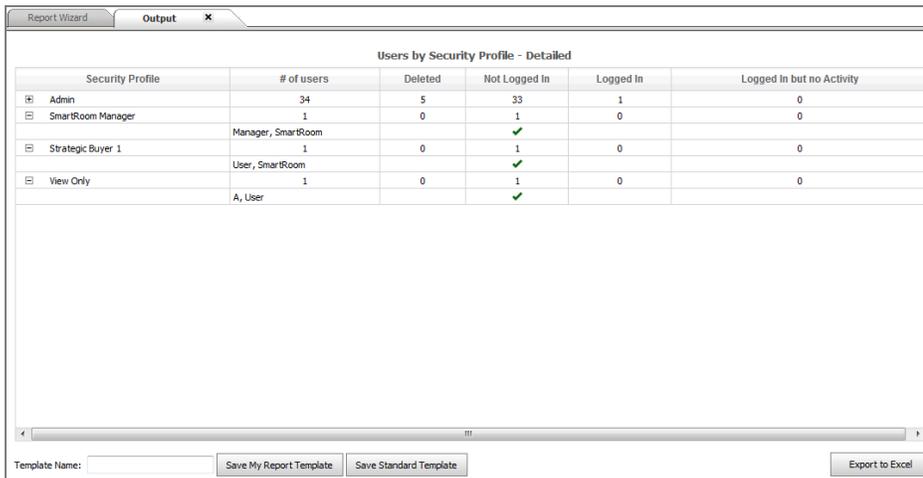
## Graph – Line Graph



## Graph – Bar Graph



## Detailed List

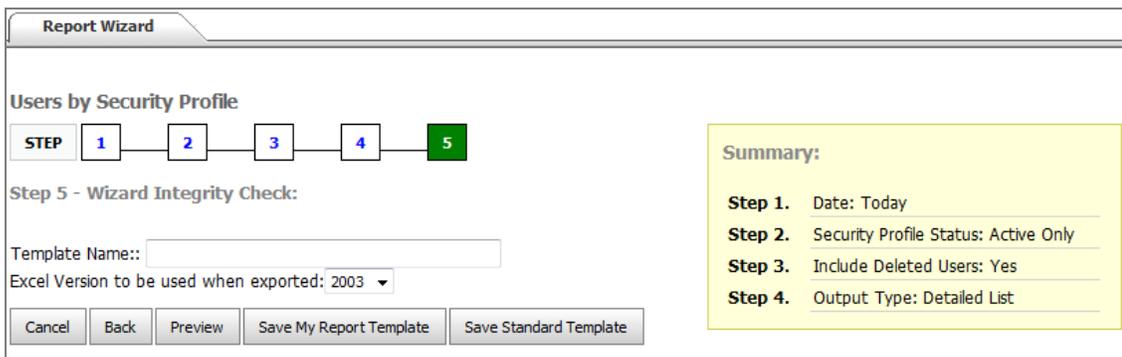


The screenshot shows the 'Output' window of the Report Wizard. The title bar includes 'Report Wizard' and 'Output X'. The main content area is titled 'Users by Security Profile - Detailed' and contains a table with the following data:

Security Profile	# of users	Deleted	Not Logged In	Logged In	Logged In but no Activity
Admin	34	5	33	1	0
SmartRoom Manager	1	0	1	0	0
Manager, SmartRoom					
Strategic Buyer 1	1	0	1	0	0
User, SmartRoom					
View Only	1	0	1	0	0
A, User					

At the bottom of the window, there is a 'Template Name:' field, two buttons: 'Save My Report Template' and 'Save Standard Template', and an 'Export to Excel' button.

The 5<sup>th</sup> and final step is the same as with all reports within the Report Wizard. The created report can be saved as a "My Report Template" or a "Standard Template". A summary is also provided to ensure the output is accurate. Selecting "Preview" will display the results of the wizard to ensure the desired report is produced.



The screenshot shows the 'Report Wizard' window at the 'Step 5 - Wizard Integrity Check' stage. The title bar says 'Report Wizard'. Below the title, there is a progress indicator with five steps, where step 5 is highlighted in green. The main content area is titled 'Users by Security Profile' and contains the following elements:

- A progress indicator showing steps 1 through 5, with step 5 highlighted in green.
- The text 'Step 5 - Wizard Integrity Check:'.
- A 'Template Name:' input field.
- An 'Excel Version to be used when exported:' dropdown menu set to '2003'.
- Buttons: 'Cancel', 'Back', 'Preview', 'Save My Report Template', and 'Save Standard Template'.
- A yellow 'Summary:' box on the right containing the following information:
  - Step 1.** Date: Today
  - Step 2.** Security Profile Status: Active Only
  - Step 3.** Include Deleted Users: Yes
  - Step 4.** Output Type: Detailed List

## 2.3 Document List

This report will provide you with every file that was uploaded during the specified time period. The report can be displayed in two formats, a list or including folders in an index tree.

The 1<sup>st</sup> step is to specify the time period. To review every upload since the inception of the SmartRoom select "Before" and then select today's date.

Report Wizard

Document List

STEP 1 2 3 4

Step 1 - Select Date Range (Date Uploaded):

Today

Last 7 Days

Last 30 Days

Last 12 Months

Before 12/08/2011

After

Between

Cancel Next

Once the date range has been selected, the 2<sup>nd</sup> step is to select what type of documents should be included.

Report Wizard

Document List

STEP 1 2 3 4

Step 2 - Select Document Type and Size Filter:

All  PDF Only  Non PDF

All

Under or equal to 10 KB

Under or equal to 1 MB

Over 1 MB

Over or equal to 10 MB

Over ( ) (MB)

Cancel Back Next

The 3<sup>rd</sup> step is to determine how the information should be displayed.

## Document List

Document List - List					
Folder Name	File Name	File Type	File Size	Date Uploaded	
1 Basic Corporate Information Te	<a href="#">(AA)-short_file_name.pdf</a>	PDF	148 KB	11/10/2011 1:58 PM	
1 Basic Corporate Information Te	<a href="#">(BB)-test.pdf</a>	PDF	74 KB	11/10/2011 1:58 PM	
1 Basic Corporate Information Te	<a href="#">(CC)-4ae13d6c.exe</a>	Executable File	2 KB	11/10/2011 1:58 PM	
1 Basic Corporate Information Te	<a href="#">(DD)-romeo_printprotected.pdf</a>	PDF	420 KB	11/10/2011 1:58 PM	
1 Basic Corporate Information Te	<a href="#">(EE)-datatype.xls</a>	Excel Worksheet	212 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(FF)-daily.txt</a>	Text File	160 B	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(GG)-Online Ballot.doc</a>	Word Document	633 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(HH)-Corrupted3.pdf</a>	PDF	468 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(II)-bdrviewerJob_4725.pdf</a>	PDF	718 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(JJ)-Java Printing.pdf</a>	PDF	1018 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(KK)-TESTalliance1.pdf</a>	PDF	65 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(LL)-Copy of test.pdf</a>	PDF	74 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(MM)-[test].pdf</a>	PDF	9 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(NN)-short_file_name.pdf</a>	PDF	30 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(OO)-~!@#\$.pdf</a>	PDF	30 KB	11/10/2011 1:59 PM	
1 Basic Corporate Information Te	<a href="#">(PP)-(I)-2 AAA1.pdf</a>	PDF	13 KB	11/10/2011 1:59 PM	
10 Contingencies	<a href="#">(AA)-Online Ballot.doc</a>	Word Document	633 KB	11/10/2011 1:59 PM	

Template Name:  Save My Report Template Save Standard Template Export to Excel

## Index Tree

Document List - Tree					
Type	Folder Name	File Name	File Type	File Size	Date Uploaded
Folder	SmartRoom				
Folder	1 Basic Information				
	1 Basic Information	<a href="#">DOC Test File.doc</a>	Word Document	22 KB	11/10/2011 1:36 PM
	1 Basic Information	<a href="#">PDF Test File.pdf</a>	PDF	3 KB	11/10/2011 1:36 PM
	1 Basic Information	<a href="#">XLSX Test File.xlsx</a>	Excel Worksheet	21 KB	11/18/2011 12:04 PM
	1 Basic Information	<a href="#">XLS Test File.xls</a>	Excel Worksheet	48 KB	11/18/2011 12:04 PM
	1 Basic Information	<a href="#">PPTX Test File.pptx</a>	Power Point	35 KB	11/21/2011 4:13 PM
	1 Basic Information	<a href="#">DOCK Test File.docx</a>	Word Document	12 KB	11/21/2011 4:44 PM
	1 Basic Information	<a href="#">XLS Test File 02.xls</a>	Excel Worksheet	48 KB	11/23/2011 3:54 AM
	1 Basic Information	<a href="#">Test Unit.xls</a>	Excel Worksheet	19 KB	11/23/2011 3:57 AM
	1 Basic Information	<a href="#">Test Unit 1.xls</a>	Excel Worksheet	17 KB	11/23/2011 4:01 AM
Folder	1.1 Company History Outline				
Folder	1.2 Product Information				
Folder	1.3 Press Releases				
Folder	1.4 Corporate Structure				
Folder	1.5 Operational Structure				
Folder	1.6 Incorporation Documents and Minutes				
Folder	1.7 Capitalization and Securities				
Folder	1.8 Non Compete Agreements				
Folder	1.9 Insurance				
Folder	1.10 Intercompany and Employment Agreements				

Template Name:  Save My Report Template Save Standard Template Export to Excel

The 4<sup>th</sup> and final step is the same as with all reports within the Report Wizard. The created report can be saved as a “My Report Template” or a “Standard Template”. A summary is also provided to ensure the output is accurate. Selecting “Preview” will display the results of the wizard to ensure the desired report is produced.

The screenshot shows the 'Report Wizard' window. At the top, there's a 'Document List' section with a progress indicator showing four steps: 1, 2, 3, and 4. Step 4 is highlighted in green. Below this, the text reads 'Step 4 - Wizard Integrity Check:'. There are two input fields: 'Template Name:' and 'Excel Version to be used when exported: 2003'. At the bottom, there are five buttons: 'Cancel', 'Back', 'Preview', 'Save My Report Template', and 'Save Standard Template'. On the right side, there is a yellow box titled 'Summary:' containing three items: 'Step 1. Date: Before 12/08/2011', 'Step 2. Document Type: All, Document Size: All', and 'Step 3. Output Type: Show in Index Tree'.

## 2.4 Document Activity

This report provides in-depth, customizable outputs related to any type of usage within the SmartRoom™.

The 1<sup>st</sup> step is to select the type of usage the report should contain. The options are as shown below.

**Report Wizard**

**Document Activity**

STEP 1 — 2 — 3 — 4 — 5 — 6 — 7 — 8

**Step 1 - Select Activities to Include:**

[Check All](#) | [Check None](#)

<input type="checkbox"/> View	<input type="checkbox"/> Upload
<input type="checkbox"/> Print	<input type="checkbox"/> Modify
<input type="checkbox"/> Save	<input type="checkbox"/> Delete
<input type="checkbox"/> Move	<input type="checkbox"/> Preview

Cancel Next

The 2<sup>nd</sup> step is to provide the date range that should be used. Grouping of the information can also be selected, when necessary.

**Report Wizard**

**Document Activity**

STEP 1 — 2 — 3 — 4 — 5 — 6 — 7 — 8

**Step 2 - Select Date Range:**

<input checked="" type="radio"/> Today <input type="radio"/> Last 7 Days <input type="radio"/> Last 30 Days <input type="radio"/> Last 12 Months <input type="radio"/> Before <input type="radio"/> After <input type="radio"/> Between	<b>Group data by:</b> <input type="radio"/> Day <input type="radio"/> Week <input type="radio"/> Month <input type="radio"/> Quarter <input type="radio"/> Year <input checked="" type="radio"/> None
---	---

Cancel Back Next

The 3<sup>rd</sup> step is to determine if deleted users and/or files should be included in the report.

The screenshot shows the 'Report Wizard' interface. At the top, the title 'Report Wizard' is displayed. Below it, the section 'Document Activity' is shown. A progress bar consists of eight numbered steps (1-8), with step 3 highlighted in green. The main content area is titled 'Step 3 - Options for Deleted Files and Users:'. It contains two columns of radio button options. The first column is 'Include Deleted Users' with 'Yes' and 'No' options, where 'No' is selected. The second column is 'Include Deleted Files' with 'Yes' and 'No' options, where 'No' is selected. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

The 4<sup>th</sup> step is to determine which report type is preferred.

The screenshot shows the 'Report Wizard' interface. At the top, the title 'Report Wizard' is displayed. Below it, the section 'Document Activity' is shown. A progress bar consists of eight numbered steps (1-8), with step 4 highlighted in green. The main content area is titled 'Step 4 - Select Report Type:'. It contains three radio button options: 'Total Count of Activity, including repeat Users', 'Total Count of Unique Users', and 'Details Report Only', where 'Details Report Only' is selected. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

“Total Count of Activity, including repeat Users” will show totals of the selected activity that will include any repeat usage. If a user has

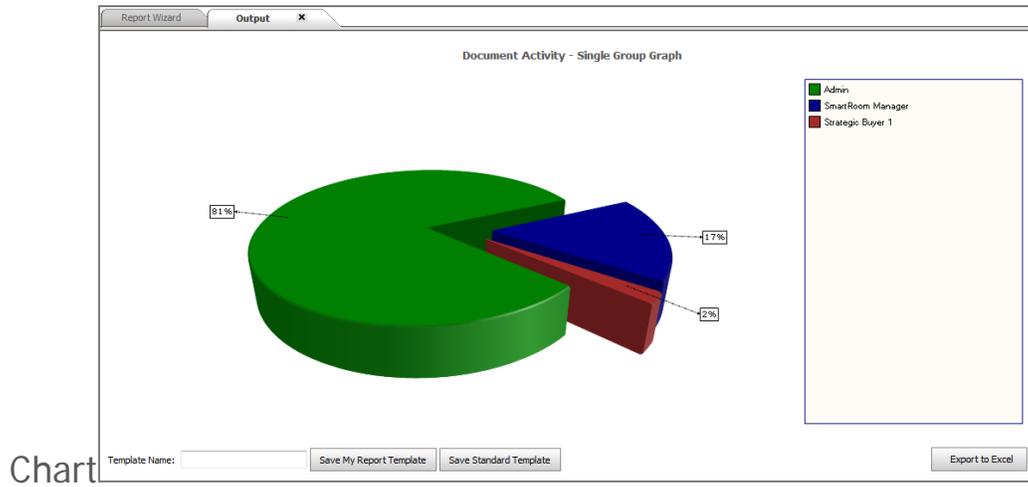
viewed a document 50 times this information will count towards the total number of views.

“Total Count of Unique Users” will not count repeat usage. If a user has viewed a document 50 times within the time frame selected it will only count as 1 towards the total number of views.

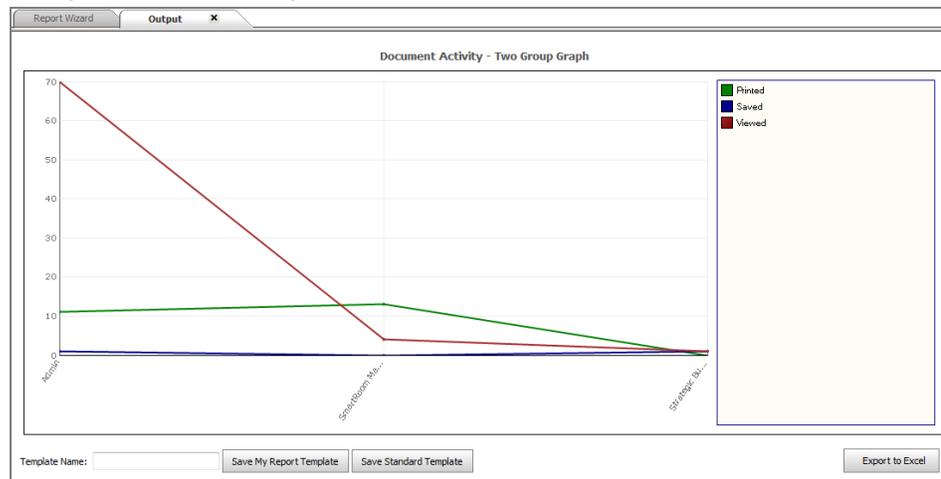
“Details Only” provides raw data of repeat usage in an index tree format without the ability to display the information in any type of graph or chart.

The 5<sup>th</sup> step is to determine which type of output is preferred. If “Details Only” report was selected in step 4 steps 5 and 6 are not applicable. Below you will find example outputs of each of the available output types.

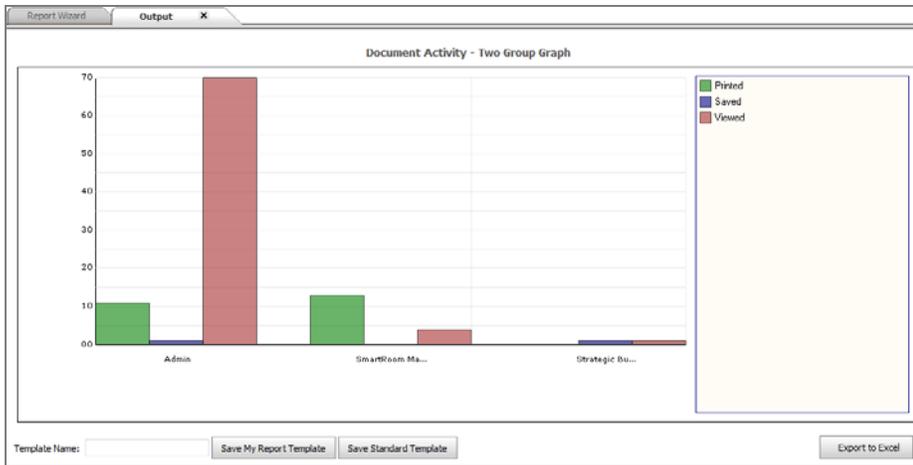
## Graph – Pie



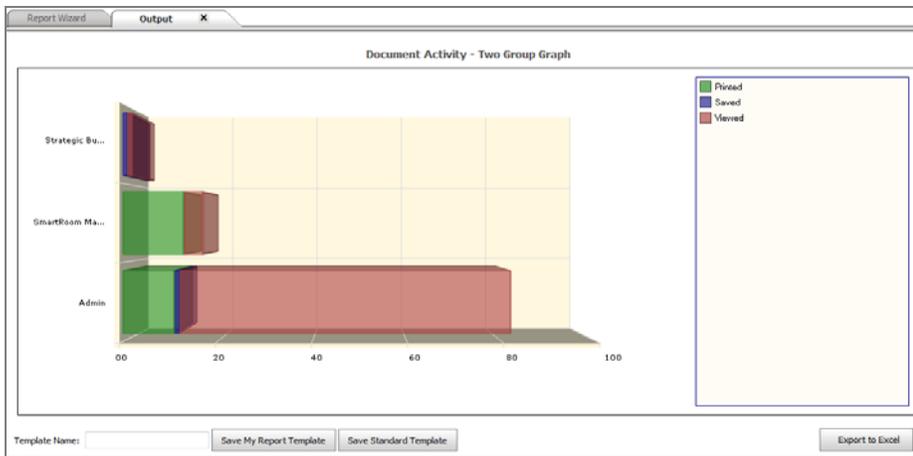
## Graph – Line Graph



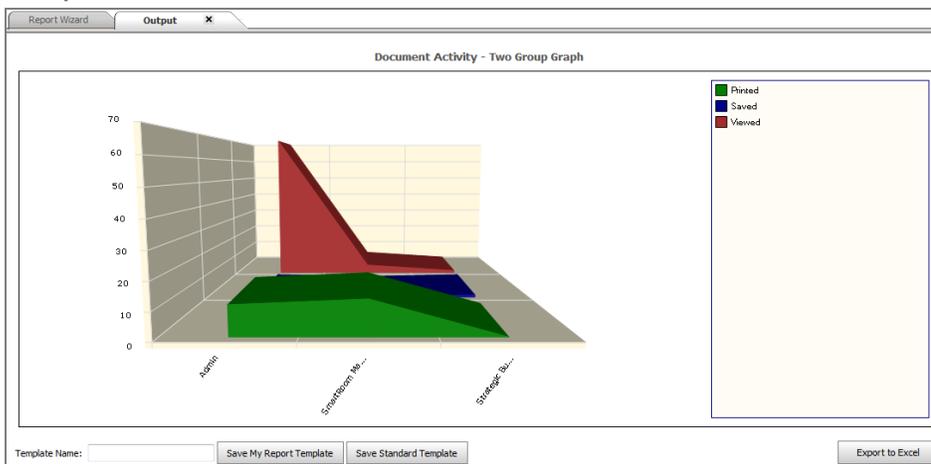
## Graph – Bar Graph



## Graph – Stacked Bar Chart



## Graph – Area Chart



## List with Drill Down

Document Activity - List with Drill Down							
Security Profile	Folder Name	File Name	User Name	Date/Time	View	Print	Save
Admin					70	1	11
SmartRoom Manager					4	0	13
	Basic Information				4	0	9
		DOC Test File.doc			0	0	1
		PDF Test File.pdf			2	0	1
		XLSX Test File.xlsx			1	0	1
		XLS Test File.xls			1	0	1
		PPTX Test File.pptx			0	0	1
		DOCX Test File.docx			0	0	1
		XLS Test File 02.xls			0	0	1
		Test Link.xls			0	0	1
		Test Link.xls			0	0	1
	Intercompany and Employment Agreements				0	0	3
		Test Document.doc			0	0	1
		Test Document.pdf			0	0	1
		Test Upload Document.pdf			0	0	1
	Press Releases				0	0	1
		PPT Test File.ppt			0	0	1
Strategic Buyer 1					1	1	0
	Basic Information				1	1	0

The 6<sup>th</sup> step is to select the type of grouping preferred for the usage totals. This will determine how the total usage for each type of document activity is grouped.

**Report Wizard**

**Document Activity**

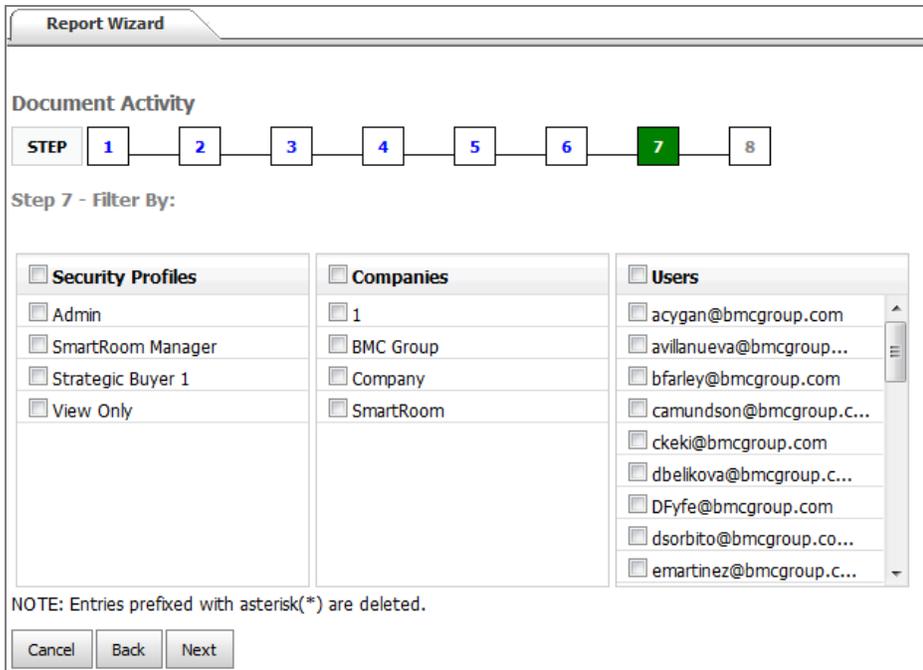
STEP 1 — 2 — 3 — 4 — 5 — **6** — 7 — 8

**Step 6 - Select Grouping for Totals:**

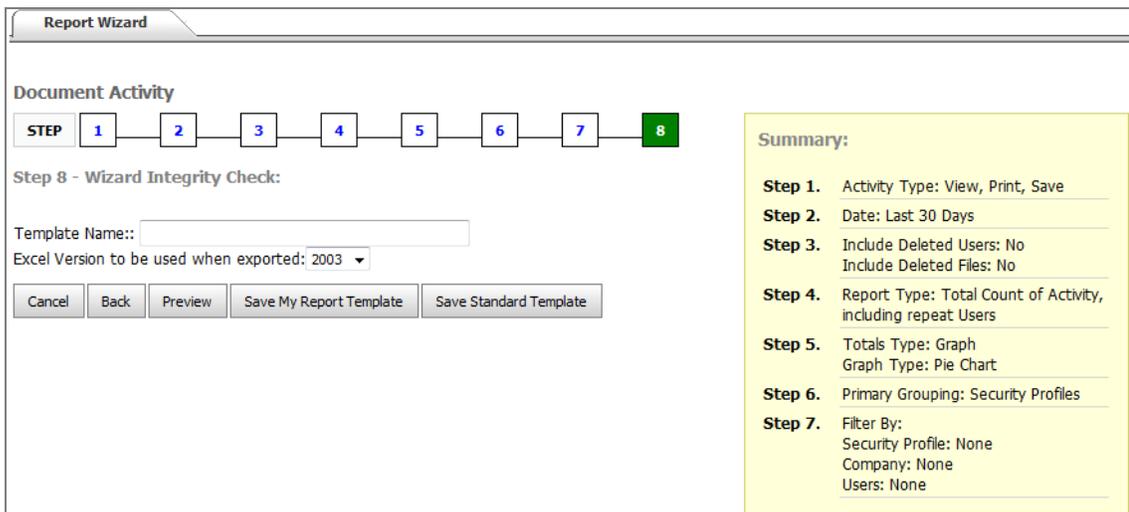
- Security Profiles
- Companies
- Users
- Folders
- Files
- Activity

Cancel    Back    Next

The 7<sup>th</sup> step is a filter. This can be used to create exclusivity within the report data. Filters can be applied by user, company, and/or security profile.



The 8<sup>th</sup> and final step is the same as with all reports within the Report Wizard. The created report can be saved as a “My Report Template” or a “Standard Template”. A summary is also provided to ensure the output is accurate. Selecting “Preview” will display the results of the wizard to ensure the desired report is produced.



## 2.5 Document Activity – Cross Tab

Similar to the “Document Activity” report this report will generate information on usage but will display it in a comparative “cross-tab” for easy comparison and analysis.

The 1<sup>st</sup> step is to select that type of usage that should be displayed.

The screenshot shows a window titled "Report Wizard" with a sub-header "Document Activity Cross - Tab". A progress bar at the top contains six steps, with step 1 highlighted in green. Below the progress bar, the text "Step 1 - Select Activity Type:" is followed by three radio button options: "Viewed" (selected), "Printed", and "Saved". At the bottom, there are "Cancel" and "Next" buttons.

The 2<sup>nd</sup> step is to select a date range.

The screenshot shows the same "Report Wizard" window, but now step 2 is highlighted in green in the progress bar. The text "Step 2 - Select Date Range:" is followed by seven radio button options: "Today", "Last 7 Days", "Last 30 Days" (selected), "Last 12 Months", "Before", "After", and "Between". At the bottom, there are "Cancel", "Back", and "Next" buttons.

The 3<sup>rd</sup> step is to determine whether not deleted users should be included.

**Report Wizard**

**Document Activity Cross - Tab**

STEP 1 — 2 — **3** — 4 — 5 — 6

**Step 3 - Options for Deleted Users:**

Include Deleted Users

Yes

No

Cancel Back Next

The 4<sup>th</sup> step determines which Security Profiles should be included within the report.

The screenshot shows the 'Report Wizard' window for 'Document Activity Cross - Tab'. At the top, a progress bar shows six steps, with step 4 highlighted in green. Below the progress bar, the text 'Step 4 - Select Security Profiles:' is displayed. A list of security profiles is shown with checkboxes: 'All' (unchecked), 'Admin' (unchecked), 'SmartRoom Manager' (checked), 'Strategic Buyer 1' (checked), and 'View Only' (checked). At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

The 5<sup>th</sup> step is to determine which type of output is preferred.

The screenshot shows the 'Report Wizard' window for 'Document Activity Cross - Tab'. At the top, a progress bar shows six steps, with step 5 highlighted in green. Below the progress bar, the text 'Step 5 - Select Report Type:' is displayed. Two radio button options are shown: 'Details' (unselected) and 'Totals' (selected). At the bottom, there are 'Cancel', 'Back', and 'Next' buttons.

“Details” reports will display exactly what documents have been accessed.

Document Activity Cross - Tab - Details - Viewed - Last 30 Days (11/10/2011 - 12/09/2011)

Type	Folder Name	File Name	SmartRoom Manager	Strategic Buyer 1	View
Folder	SmartRoom		3	1	
Folder	1 Basic Information		3	1	
	1 Basic Information	DOC Test File.doc	✗	✗	
	1 Basic Information	DOCX Test File.docx	✗	✗	
	1 Basic Information	PDF Test File.pdf	✓	✓	
	1 Basic Information	PPTX Test File.pptx	✗	✗	
	1 Basic Information	Test Unit 1.xls	✗	✗	
	1 Basic Information	Test Unit.xls	✗	✗	
	1 Basic Information	XLS Test File 02.xls	✗	✗	
	1 Basic Information	XLS Test File.xls	✓	✗	
	1 Basic Information	XLSX Test File.xlsx	✓	✗	
Folder	1.1 Company History Outline		0	0	
Folder	1.2 Product Information		0	0	
Folder	1.3 Press Releases		0	0	
Folder	1.4 Corporate Structure		0	0	
Folder	1.5 Operational Structure		0	0	
Folder	1.6 Incorporation Documents and Minutes		0	0	
Folder	1.7 Capitalization and Securities		0	0	
Folder	1.8 Non Compete Agreements		0	0	
Folder	1.9 Insurance		0	0	
Folder	1.10 Intercompany and Employment Agreements		0	0	

“Totals” reports will show totals per folder without showing what documents were accessed.

Document Activity Cross - Tab - Totals - Viewed - Last 30 Days (11/10/2011 - 12/09/2011)

Folder Name	SmartRoom Manager	Strategic Buyer 1	View Only
SmartRoom	3	1	0
1 Basic Information	3	1	0
1.1 Company History Outline	0	0	0
1.2 Product Information	0	0	0
1.3 Press Releases	0	0	0
1.4 Corporate Structure	0	0	0
1.5 Operational Structure	0	0	0
1.6 Incorporation Documents and Minutes	0	0	0
1.7 Capitalization and Securities	0	0	0
1.8 Non Compete Agreements	0	0	0
1.9 Insurance	0	0	0
1.10 Intercompany and Employment Agreements	0	0	0
1.11 Shareholder Listing	0	0	0
2 Financials	0	0	0
3 Financial Forecasts	0	0	0
4 Balance Sheet Analysis	0	0	0
5 Contingencies	0	0	0
6 Taxes	0	0	0
7 Sales and Marketing	0	0	0
8 Manufacturing Production	0	0	0
9 Intellectual Property	0	0	0

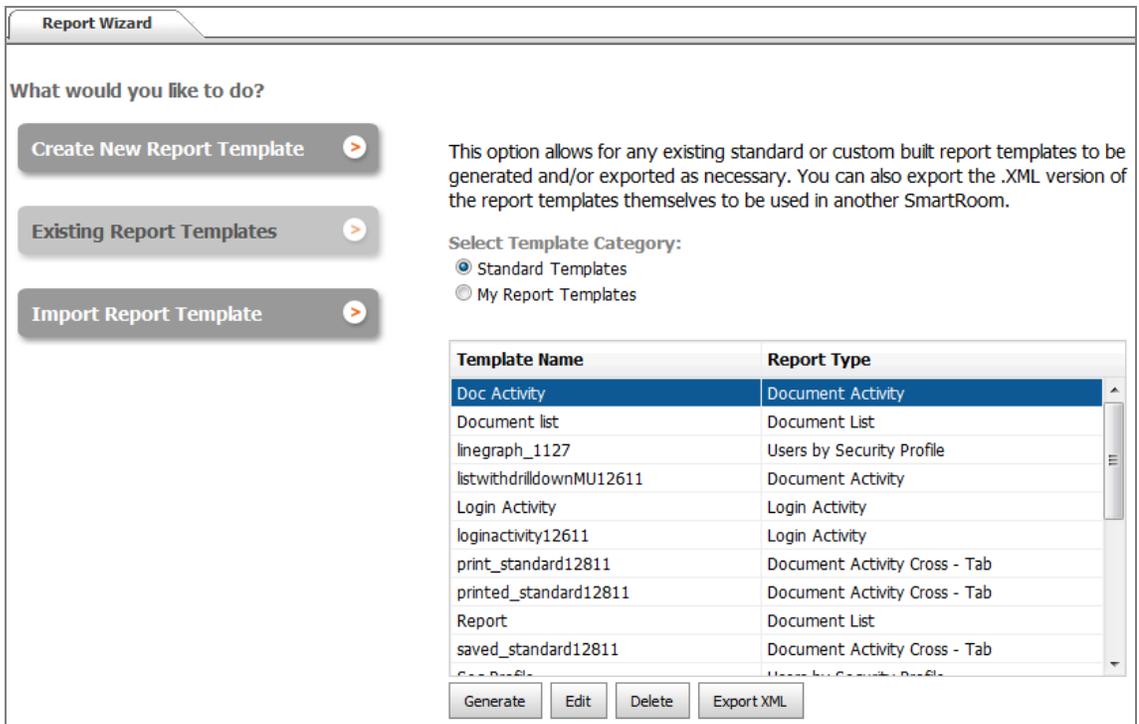
The 6<sup>th</sup> and final step is the same as with all reports within the Report Wizard. The created report can be saved as a “My Report Template” or a “Standard Template”. A summary is also provided to ensure the output is accurate. Selecting “Preview” will display the results of the wizard to ensure the desired report is produced.

The screenshot shows the 'Report Wizard' window with the 'Output' tab selected. The main title is 'Document Activity Cross - Tab'. A progress bar at the top indicates six steps, with step 6 highlighted in green. Below the progress bar, the text reads 'Step 6 - Wizard Integrity Check:'. There are two input fields: 'Template Name::' and 'Excel Version to be used when exported: 2003'. At the bottom of the form are five buttons: 'Cancel', 'Back', 'Preview', 'Save My Report Template', and 'Save Standard Template'. On the right side, a yellow 'Summary:' panel contains the following information:

- Step 1.** Activity Type: Viewed
- Step 2.** Date: Last 30 Days
- Step 3.** Include Deleted Users: No
- Step 4.** Security Profiles:
  - SmartRoom Manager
  - Strategic Buyer 1
  - View Only
- Step 5.** Report Type: Totals

## 3.0 Existing Report Templates

Any template that has been saved as either a “My Report Template” or “Standard Template” can be accessed from this page.



The screenshot shows the "Report Wizard" interface. On the left, under "What would you like to do?", there are three buttons: "Create New Report Template", "Existing Report Templates", and "Import Report Template". To the right, a text block explains that this option allows for existing standard or custom built report templates to be generated and/or exported. Below this, there are radio buttons for "Standard Templates" (selected) and "My Report Templates". A table lists various templates with their names and report types. At the bottom of the table are buttons for "Generate", "Edit", "Delete", and "Export XML".

Template Name	Report Type
Doc Activity	Document Activity
Document list	Document List
linegraph_1127	Users by Security Profile
listwithdrilldownMU12611	Document Activity
Login Activity	Login Activity
loginactivity12611	Login Activity
print_standard12811	Document Activity Cross - Tab
printed_standard12811	Document Activity Cross - Tab
Report	Document List
saved_standard12811	Document Activity Cross - Tab
...	...

“My Report Templates” are personal templates and are only visible to the user that created them.

“Standard Templates” are templates that have been created by anyone with access to the Report Wizard. In practice, SmartRoom Managers can access reports created by other SmartRoom Managers and run them as necessary.

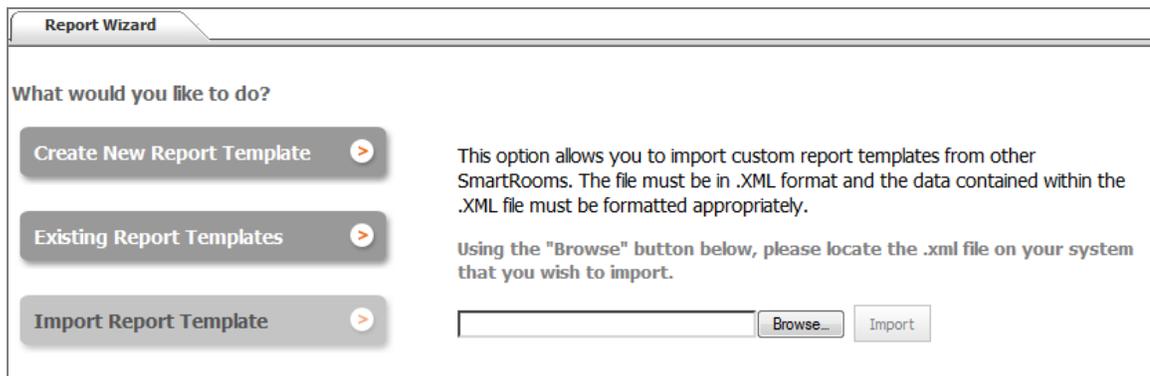
Report templates can be exported to XML, edited, and/or deleted from this location as well.



## 4.0 Import Report Template

As many of our SmartRoom Managers have multiple SmartRooms and/or use the SmartRoom repeatedly, it is now possible to use the same reports on any SmartRoom using the "Import Report Template" option.

As shown in the "Existing Report Template" section (3.0), users have the ability to export the report templates to XML. Similarly, these exported XML report templates can be imported using this page.



The screenshot shows a web interface titled "Report Wizard". Under the heading "What would you like to do?", there are three buttons: "Create New Report Template", "Existing Report Templates", and "Import Report Template". The "Import Report Template" button is selected. To the right of this button, there is a text box explaining that this option allows importing custom report templates from other SmartRooms, provided the file is in .XML format and properly formatted. Below this text is a "Browse..." button next to an empty text input field, and an "Import" button.

Simply locate the XML file using the browse button and then select "Import". Once imported the template will provide options to save the template accordingly or to preview it so that the appropriate information is provided.

Please note that some imported report templates may require adjustments if filters are in place specific to security profiles, users, and/or companies that do not exist in the SmartRoom.

## 5.0 Support

As always our support team is available 24 hours a day, 7 days a week, 365 days a year in the event that assistance is needed with the File Manager or any other SmartRoom technology.

Please reach out to us using the below contact information as necessary.

Email: [SmartRoomSupport@bmcgroup.com](mailto:SmartRoomSupport@bmcgroup.com)

Phone:

North America: 1.877.332.5739

Asia: 852.800.930.643

Brazil: 0.800.722.0545

Europe: 00.800.3325.7666

Japan: 0120.974.858