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Simplified User Rights

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SmartRoom now has new simplified user rights. This new functionality will allow for every SmartRoom Manager to be able to setup their own permissions for documents, folders, and site-wide access. With our SmartRoom, you can create unlimited varied user access security profiles. Each security profile will be defined by the SmartRoom Manager(s) and can be discussed in detail with your designated Project Manager.

As a best practice, we recommend that you create a different security profile for every entity being invited to the SmartRoom. The entity may consist of a specific company, their legal counsel, bankers, internal/external consultants, and any others that are representing one party. As you are reviewing user statistics to determine which entity has been reviewing (viewing, printing, saving) documents, you will be able to pull reports by security profile which will help you determine which party has expressed interest and what amount of interest. You should name the security profile either by the specific party's corporate name or create a unique name. These names are specifically for SmartRoom Manager purposes only and any other member invited to the SmartRoom will not know which security profile they are invited under nor will they know of other security profiles within the SmartRoom.

Although each SmartRoom Manager will now have the ability to setup their own permissions, your designated Project Manager and our 24/7/365 support will be accessible to assist in any way we can. Below you will find the step by step procedures for setting up a new security profile.

Setting up a new security profile or duplicating an existing security profile:

1. Click on "Security Profiles" in the SmartRoom Management menu.

Figure 1.1

2. In order to setup a new security profile – enter the name of the specified security profile under the "Create New User Security Profile" field and click on "Create". To modify an existing security profile, select the specified security profile from the drop down below labeled "Edit Existing User Security Profile" and click on "View."
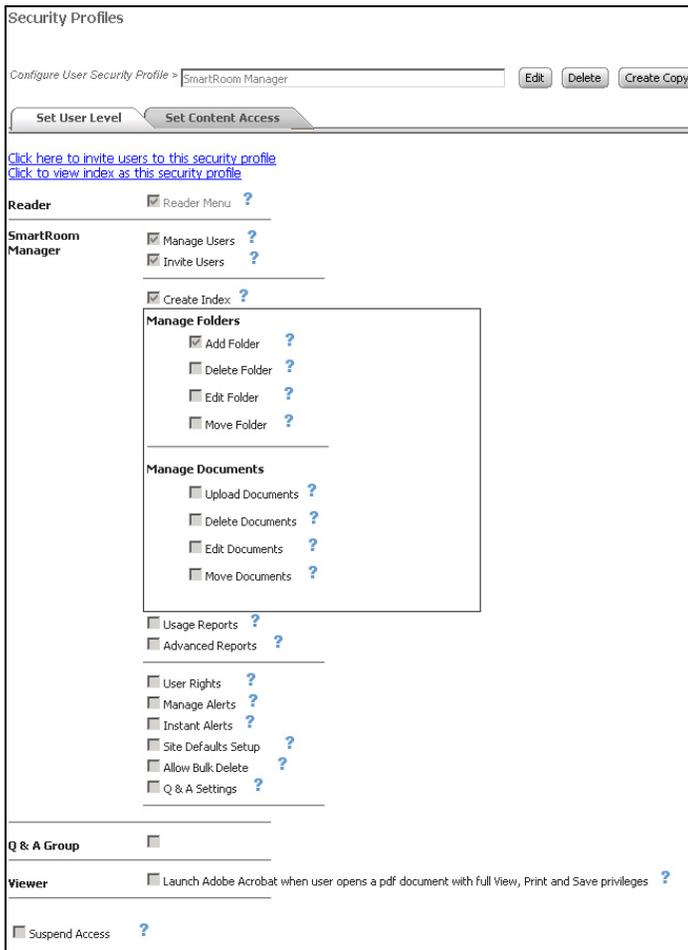
Figure 2.1

3. You will now be able to setup the specific user rights from the tabs shown below.

Figure 3.1

4. Within the "Set User Level" tab, you will see a screen as shown below. As a default, the "Reader Menu" selection box will already be selected.

Figure 4.1

In order to modify the standard settings, you must click "Edit". You also have the option of replicating a security profile in the event that you have multiple parties with the same access but will be creating a separate security profile for each entity.

Figure 4.2
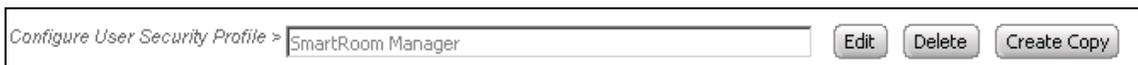
Below, you will find the definitions of all functionality within the "Set User Level" page. You can also hover your mouse cursor over the ❓ on to the right of the specific functionality, and you will see a pop-up with a definition.

Reader Menu: Standard user menu with options to manage their personal account and view, save, and print documents according to their specific rights.

Manage Users: Allows user the ability to manage all existing user's in the Smart Room. You can change a user's security profile, modify user credentials, and delete users from the SmartRoom.

Invite Users: Allows user's the ability to send invitations to external users of the SmartRoom.

Create Index: Allows the user the ability to create an entire index (This does not apply to making adjustment to an existing index).

Add Folder: Allows user to create new folders or subfolders within an existing index. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Delete Folder: Allows user the ability to delete existing folders that contain no subfolders or documents. The "M" or "Modify" right needs to set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Edit Folder: Allows user to rename an existing folder or subfolder. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Move Folder: Allows user the ability to move a folder into a new location within the index. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Upload Documents: Allows users the ability to upload documents to the SmartRoom. Up to 5 documents can be uploaded through the site using "Upload and Edit Documents". File Manager can also be utilized for bulk file uploads. Drag n Drop (DnD) can also be utilized by clicking on "View by Index" menu item under "Document Review" and right-clicking on a folder name and selecting the "Upload Folders/Documents" menu item. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work.

Delete Document: Allows users the ability to delete documents within the SmartRoom. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Edit Documents: Allows users the ability to rename documents within the SmartRoom. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

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Move Documents: Allows users the ability to move a document in a new location within the index. The "M" or "Modify" right needs to be set to "Allow" under "Set Content Access" in order for this function to work. This functionality is also available with the File Manager application.

Usage Reports: Allows users access to comprehensive site usage reports reflecting all existing users.

Advanced Reports: Allows user's access to Advanced Reports.

User Rights: Allows user to create a new user security profile and/or modify an existing security profile. Once a security profile has been setup, users can then be invited into the SmartRoom as members of the newly created security profile.

Manage Alerts: Allows users the ability to create, edit, and delete daily, hourly, or immediate email alerts. These alerts are generated based on selectable criterion and sent to users based on their document level access.

Site Defaults Setup: Allows users to manage site defaults, such as document and folder numbering, country defaults, and Message Templates.

Bulk Delete: Allows users to delete folders that contain any number of subfolders and/or files.

QA Settings: Allows the security profile to manage Q&A settings and Q&A groups.

QA Group: Associates the security profile with a selected Q&A group.

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5. After you have selected your specific options for the newly created security profile's user level, you will select go to the "Set Content Access" tab to determine what information the security profile will have access to.

Figure 5.1

6. You will see the screen below with your index that has been populated within the SmartRoom. Within each row, there will be the name of the **folder**, **subfolder**, or **document** that you would like to set permissions on. Each column represents a different functionality that you can enable or disable. In order to apply a change to the entire index such as allow view-only access, you would click on the "V" within the row stating "SmartRoom Index".

> **V:** Allow viewing of the document(s)
>
> **P:** Allow printing of the document(s)
>
> **S:** Allow saving of the document(s)
>
> **T:** Allow **only** the title of the folder or document to be displayed. No content is accessible.
>
> **M:** Allow the ability to modify the specified folder or document

Figure 6.1

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7. Once you have selected one of the options from the columns listed (V, P, S, T, M) the existing index will immediately reflect the changes that you have made.

Figure 7.1

You will notice that all folders now have a check mark [✓] within the View [V] column. Based on the information provided, and as the row stating "SmartRoom Index" is highlighted, you can see that this change was made to the entire index. This will allow for the member to have read-only access to all of the information within the index.

This same protocol can be applied to any specific document, folder, or subfolder.

Once you are done setting up ALL user rights for the specified security profile, you MUST click on the "Save" button located in the upper right hand corner of your screen. This will enable the changes you have made for the specific security profile.

Selecting "Cancel" will revert the security profile to its state before the "Edit" button was selected.

Figure 7.2
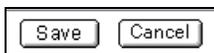
All User Rights can be modified at any point. We understand that there may be a phased approach with user rights; releasing certain rights to individual and parties early in the transaction and later release additional rights. We have enabled our platform for this very reason and our objective was to allow the highest level of security while allowing the clients to have the ease of use in creating various user rights.

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Should there be any questions/concerns in regards to this document or should you want a tutorial on the functionality, please do not hesitate to reach out to your Project Manager. Alternatively, please feel free to contact our 24/7/365 Customer Support via e-mail at **SmartRoomSupport@bmcgroup.com** or via phone with the numbers listed below:

North America: 877.332.5739

Asia: 852.800.930.643

Brazil: 0.800.722.0545

Europe: 00.800.3325.7666

Japan: 0120.974.858

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