

SmartRoom

User Manual For End User

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1.0 Login

Follow the link provided in your invitation or go directly to **https://bdr.bmcgroup.com** to log into your SmartRoom. Use the username and password provided in your invitation email. If you have forgotten or misplaced your password, click on the **Forgot Password?** link to be sent a reminder.

Please note this will also unlock your account and send you a new password.

If you experience login problems please call or email our Technical Support Team using the contact information listed at the bottom of the login page.



2.0 Confidentiality Agreement

You will be prompted to read and accept the confidentiality agreement each time you enter the SmartRoom. Click Agree to enter the site.

Confidentiality Agreement
The information contained on this website is confidential. As a condition to receiving access to this website, you agree to treat all information which is contained herein as confidential, unless and until such information has been made generally available to the public or unless The Company agrees in writing to remove this restriction. The information contained on this website may not, in whole or part, be reproduced or distributed to others. Furthermore, you agree that the information included herein shall be used solely for the purpose of evaluating a possible transaction with The Company. Nothing herein shall limit or impair your right to disclose information, if legally required to do so, in any judicial, administrative or governmental proceeding, subject to your prior notification of The Company. Your obligations of confidentiality and non-disclosure are set forth in more detail in a separate agreement and nothing in this website will be deemed to supersede or modify your obligations under that agreement. If you do not believe you are bound by such a non-disclosure agreement, you must exit this website now.
Agree Disagree



3.0 Software Installation

First time users will need to download and install the latest version of the Java Runtime Environment (JRE) in order to appropriately view, print, and/or save documents within the SmartRoom. Although most workstations already have the appropriate software installed, the software can easily be downloaded and installed from http://java.com.

If any issues occur after updating your Java Runtime Environment please check the site FAQ under the Help section of the SmartRoom for further troubleshooting tips or you can reach out to us directly at 1-877-332-5739 or SmartRoomSupport@bmcgroup.com.

4.0 Dashboard

When enabled, the Dashboard provides each end user the option to immediately review and track their progress and usage of the SmartRoom. This includes any documents that have newly been uploaded.

Any time that there is a change that is related to the below graphs or tables, they will be updated each time that the site is refreshed or the welcome page is re-accessed.





5.0 Document Review and Index Maintenance

5.1 DOCUMENT INDEX



5.1.1 Index View

'View by Index' will display the SmartRoom index under the 'Index View' pane.

You can expand and collapse individual folders and sub-folders by clicking on the 🗄 🛅 🗇 🍅 icons.

Using the buttons above the index, you can expand \square or collapse \square all folders and sub-folders, zoom in \square or out \square of the index. Print \blacksquare the index and export \blacksquare the index to Microsoft ExcelTM.

Documents will be visible below the expanded folder with the symbol on the left of each document name denoting file type.



Clicking on the document name will open the document in a separate window.

5.1.2 FIRST PAGE PREVIEW

If enabled there is the option to view the first page of a document without opening the document. Users can then open the document by clicking on the image that comes up.



To ensure you can access this feature, if enabled, please check the box 'Allow Preview File' under My SmartRoom>Account>Options tab.

There are two ways to display the first page Preview:

1. Hovering your cursor over the document name while in the Index View or File View.

2. Selecting the '**Preview**' option while right clicking on a document name under the **Index View** or **File View**.



5.1.3 RIGHT CLICK CONTROLS

Right clicking on the folder name will bring up the follow functionality:

		Send to Save Queue	This will send the selected to the Bulk Save Queue
		Send to Print Queue	This will send the selected to the Bulk Print Queue
1		• · · · · · · • • • · • ·	
	1	Name: 12.1 Standard Agreement	ts
		Send To Save Queue	
	1	Send To Print Queue	

5.1.4 FILE VIEW

When clicking on a folder containing documents under '**Index View**', the details of the documents in the folder will be displayed in the '**File View**' pane.

File View						
Name 🔺	Size	Uploaded	Last Viewed			
J-A Binder1.pdf	52 KB	02-19-2009				

The details include: The document name, document file size, date it was uploaded, last time you viewed or printed the document. Each of these columns can be sorted by clicking on the respective column heading.

Clicking on the document name will open the document in a separate window.



5.2 DOCUMENT VIEWER

When opened, a document will appear in a separate window within the viewer.



Document Viewer Controls:

Navigate through the document	Side Scroll bar
Zoom in and out	€ 100% ▼ ⊖
Rotate the document	42 24
Print	a
Save	
Word and phrase search	Find
Download additional font packs	TH

(Where necessary if viewing non-English documents)



5.3 VIEW BY LIST

'**View by List**', will display a complete list of files available in the SmartRoom alongside their path or location. You may sort the list of documents by the parameters at the top of each column.

View by	iew by List								
								Page 1 of 3 1 2 3	
Filter: Sho	ilter: Show all documents Clear All Filters Export to Excel Records Per Page 25 💌 Number of Records: 66								
	Review Status	Notes	Name 🔺	Path	Size	Uploaded	Last Viewed	Last Printed	
Options ▼	Unopened		<u>1 Site QC Checklist revised 8-18-</u> 09.doc	UAT Test Folder 2	484 KB	05-08-2010			
Options ▼	Unopened			UAT Test Folder 1	28 KB	05-08-2010			
Options ▼	Unopened		<u>1</u> SampleUserList+Instructions.xls	UAT Test Folder 3	25 KB	05-08-2010			
Options V	Unopened		10 Peterson.jpg	UAT Test Folder 1	88 KB	05-08-2010			
Options V	Unopened	2	11 Party.jpg	UAT Test Folder 1	137 KB	05-08-2010			
Options ▼	Unopened		12 Painter.jpg	UAT Test Folder 1	73 KB	05-08-2010			
Options 🔻	Unopened		13 Melissa 2. jpg	UAT Test Folder 1	70 KB	05-08-2010			
Options V	Unopened		14 Melissa 1. jpg	UAT Test Folder 1	71 KB	05-08-2010			
Options ▼	Unopened		<u>15 Maureen.jpg</u>	UAT Test Folder 1	137 KB	05-08-2010			

Clicking on the Options to box will bring up the options for creating a document note, printing, saving and creating a Q&A inquiry for that document.

Clicking on the document name will open the document in a separate window.

5.3.1 Export To Excel

'Export to Excel' will bring up a dialogue box asking you to either open or save the Index as an Excel[™] file. This file will show the documents available to you in an index structure. It will also denote different pieces of information regarding the documents/folders.

You will also be prompted to export the list in a version that soothes your machine – whether in Excel 2007 or in Excel 2003 version as shown below –

Export List To Excel					
Select excel version: © Excel 2007 © Excel 2003					
Please note that by performing this function there may be a delay in processing.					
Continue Cancel					



5.4 SEARCH

You may search for words or terms within each document by using the search box located on the top-right corner of the site. Located search terms will be highlighted within the document. The accuracy of the search function is affected by the quality of the source document and whether OCR (Optical Character Recognition) has been applied to any hard copy documents that were scanned prior to uploading.

You are also given options to define your search as shown below.

Logout Support	X	Search	樽
	 File Description File Text Folder Name Please note that by performing this function there may be a delay in processing. Advanced Search 		

5.4.1 ADVANCED SEARCH

In addition to the standard search, users have the ability to complete an advanced search by selecting the Advanced Search link on the drop down. It is also possible to right click within the index on a specific folder and select Search and the selecting Advanced Search.

You will be able to specify exactly what you are looking for based on the below screenshots. You have the ability to add or remove clauses as necessary.

Advance	d Search		
Hide Sear	ch Options		
🗹 File De	scription 🔽 File	Text 🗹 Folde	r Name
Search fo	or these words:		
×	And	C or	
×	C And	⊙ _{Or}	
Click to a	dd a new clause		
Search	Reset Fields		



5.5 PRINT QUEUE

Print Qu	Print Queue							
	Page: 1 of 1 1							
Filter by stat	us: All	Test I	Printer Pause Printing	Cancel All	Records Per I	Page 100 💌	Total Number of Documents:5	
	Print Order	File Name	Folder	Pages	Size	Status	Date Requested	
Options V	1	1 2007 Test Upload Document 4.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM	
Options♥	2	2 Site Customization Guidelines - New UI.pdf	UAT Test Folder 1	1	154 KB	In Queue	16-08-2010 1:14 PM	
Options ♥	3	3 Test Upload Document 3.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM	
Options ▼	4	42008 Test Upload Document 2.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM	
Options V	5	63 Mahmoud.pdf	UAT Test Folder 1	1	76 KB	In Queue	16-08-2010 1:14 PM	



5.6 SAVE QUEUE

The save queue will show you how many documents remain to be downloaded to your chosen location.

Save Queue	
Total Number of Documents: 2	Resume Saving Cancel All

5.7 Q & A MESSAGES

'Q & A Messages' enables you to access all your Q&A inquiries and responses as well as post new inquiries. You may also sort the content list by clicking on any of the column headers.

Q & A Messages	
Message List Display	You have 0 unread messages
Look for Search in: 💌 Reset Filters Export to Excel	25 💌 Records Per Page
Post New Ask a General Question There are no messages to display.	

When clicking on '**Export**' a dialogue box will come up asking you if you wish to open or save your list of Q&A inquiries into an ExcelTM document.

Do you w	ant to op	en or save this fil	e?			
	Name:	CompleteThreadList	.xls			
	Type:	Microsoft Excel Wor	ksheet			
	From:	thesamevdrsite2				
		Open	Save		Cancel	
—			<i>c</i> 1			_
I ✓ Always	ask before	opening this type of	hle			
in the set of the set	'hile files fro arm your co ive this file.	om the Internet can b mputer. If you do not <u>What's the risk?</u>	e useful, some trust the sour	e files ca ce, do r	an potenti not open c	ally or

We can send a general question or response to selected members of the SmartRoom by checking the box alongside their name or to all users by checking **5end This Message to All Users**.

Q & A Messages					
Next Cancel					
Question & Answer Recipient Selection Select your recipient(5) from the list below. Click the "Next" button to continue and compose your message. Q & A Group ALL			Page: 1 of 2 1 2		
Search Username GO Clear All Filters	Search Username GO Clear All Filters ABCDEEGHIJKLMNOPQRSTUVWXYZ Records Per Page 25 💌 Number of users: (
Name	Company Name	Q & A Group Name 🔺	Category Name		
Send This Message to All Users	□ Send This Message to All Users				
L Adam		Q&A Management Group			
L Alfred		Q&A Management Group			
Eelle		Q&A Management Group			
Chris		Q&A Management Group			



6.0 My SmartRoom

6.1 ACCOUNT

6.1.1 Personal Information

Please check and edit your personal details here.

Personal Informati	ion Password Languag	je	Options
User profile for User@com	ipany.com		
* First Name	Any		
* Last Name	User		
* Primary Location	United States	~	
* Company	A Company		
* Work Phone	1234567890	E>	×t
Mobile Phone			
Fax Number			
	* required		
	Save		

6.1.2 Password

You may change your password at any time. Remember that passwords must be 8 characters or more and contain a combination of uppercase, lowercase and alpha numeric characters.

Personal Information	Password Language Options
Niska, Daamanda sharidi k	
Note: Passwords should b	e o characters or more, and needs to be a combination or uppercase, iowercase and aphanoment characters.
* Old Password	
* New Password	
* Re-Enter New Password	
•	* required
(Save



6.1.3 Language

The choice of languages available in your SmartRoom is determined by the SmartRoom Management Team. If a multi-language interface is available, you will be able to select your default language from the '**My Language**' section of the menu.

6.1.4 Options

By checking the box '**Hide Files in Combined Index**', you will only see folders when the index is displayed. This feature may be useful when viewing a large index.

By checking the box '**Allow Preview File**', you will turn on the document preview function for yourself. This feature is useful when looking for a specific document.

Please note that the File Preview must be enabled in conjunction with the profile change in order for the preview to be displayed.

6.2 ALERTS

6.2.1 Personal Alerts

You are able to set up an email alert to bring activity in the SmartRoom to your attention. This can also be done by right clicking any folder or file within the index view.

To create a new alert click on Create New Alert. To manage an existing alert click on the 2 next to the alert you want to modify or delete.

Click on the 🚔 symbol next to the folder you wish to monitor.

In most cases this would include all folders in which case click on the 🖄 symbol next to 'SmartRoom Index'





- 1. Select the type of alerts you wish to set up, 'Upload File', 'Delete', 'Read'.
- 2. Select the frequency you wish to receive these alerts, 'Immediate', 'Hourly', 'Daily'.
- 3. Check the 'Consolidate' box if you wish to receive the alerts in a single email.
- 4. Click on the 🛃 icon to save/create the alert.
- 5. Click on the \geq icon to cancel the alert.

To edit an existing alert, click on the direct to the alert. To delete an alert, click on the X next to it.

	Personal Alerts Manage Q & A Alerts						
T	Turn my Alerts Off						
		Item	Item Type	Alert Type	Frequency	Consolidate	Alert 🔺
2	×	UAT Test Folder 3	Folder	Upload File	Daily	Yes	Personal

6.2.2 Manage Q & A Alerts

'Manage Q & A Alerts' allows you to set the frequency at which we receive Q&A alerts. Alerts signify that we have received a new question or response.

Personal Alerts Ma	nage Q & A Alerts
Send New Question Alerts:	Daily Immediate Hourly Daily Never

6.3 MY SMARTROOMS

'List of SmartRooms' will present a list of all of the SmartRooms you are currently a member of. You can switch between SmartRooms by clicking on the project name or URL.

st of SmartRooms			
SmartRoom 🔺	URL	Last Visited	
SmartRoom		Never	
SmartRoom		16-08-2010 10:20 AM	
SmartRoom		16-08-2010 1:00 PM	
SmartRoom		Never	
SmartRoom		04-08-2010 3:46 PM	



7.0 Reports

7.1 MY ACTIVITY

My Activity		
Start Date: 01-08-2010 End Date	: 17-08-2010	
$oldsymbol{igodol}$ Show documents I have viewed	O Custom	
C Show documents I have not viewed	Viewed: 🚱 Yes 🔎 No 🤎 Either	
Generate Report	Printed: 🚱 Yes 🔘 No 🔘 Either Saved: 🚱 Yes 🔘 No 🔘 Either	✓ Include Folders That Have No Documents ✓ Show Folder Level Totals

These reports show us whether we have viewed, printed and/or saved documents within a specified time frame.

Show documents I have viewed

The report will show us the document index with a green tick 🗸 representing the documents we have viewed.

Show documents I have not viewed

The report will show us the document index with a red cross × representing the documents we have not viewed.

Custom

We can create a combined report which will show us the documents we have or have not viewed printed or saved depending on the required combination of these actions.

Include Folders That Have No Documents

This check box will determine whether the folders that contain no documents will show up on the document index of these reports.

Show Folder Level Totals

This check box will determine whether the total number of documents for each folder and its subfolder will be evident in the reports.



8.0 Help

8.1 USER GUIDE

Link to the current user guide.

8.2 FAQ

List of frequently asked questions and answer that you might find useful.

8.3 CONTACT THE SMARTROOM TEAM

If you are unable to find the assistance you need within this user guide please contact our support team:

By Email:

SmartRoomSupport@bmcgroup.com

By Telephone:

Asia:	852 800 930 643
Brazil:	0900 722 0545
Europe:	00 800 3325 7666
North America:	1 877 332 5739



9.0 Additional Services

9.1 Managed data hosting

This area of the site allows users who are interested specific data hosting services to reach out to us with any questions or requests.

Managed Data Hosting				
With our Managed, Cloud and Email needs-the right performance, secur or mix and match them as you see	Hosting Solutions, you can get exactly what your business ity, flexibility, scalability and price. Choose one hosting solution, fit. If you're not sure what will work best for you, just ask us.			
Talk to Us		What Are You Looking to Host?		
We are happy to answer your questions a First Name * Email *	and discuss your needs. Last Name * Company *	 Websites, Web Apps, Blogs, Web 2.0, CMS Rich Media Websites Online File Storate/Arhiving Business Email 		
Work Phone * State/Province *	Country* City* City*	 E-commerce/E-retail Websites Application Hosting (SaaS/ISV/ASP) Back Office Applications Other Hosted Solutions 		
Message				
SmartRoom Project Name / URL Manage Data Hosting will get back to no be expedited.	n-urgent requests within 24 hours while urgent requests will			
Submit * Indicates required fields				

