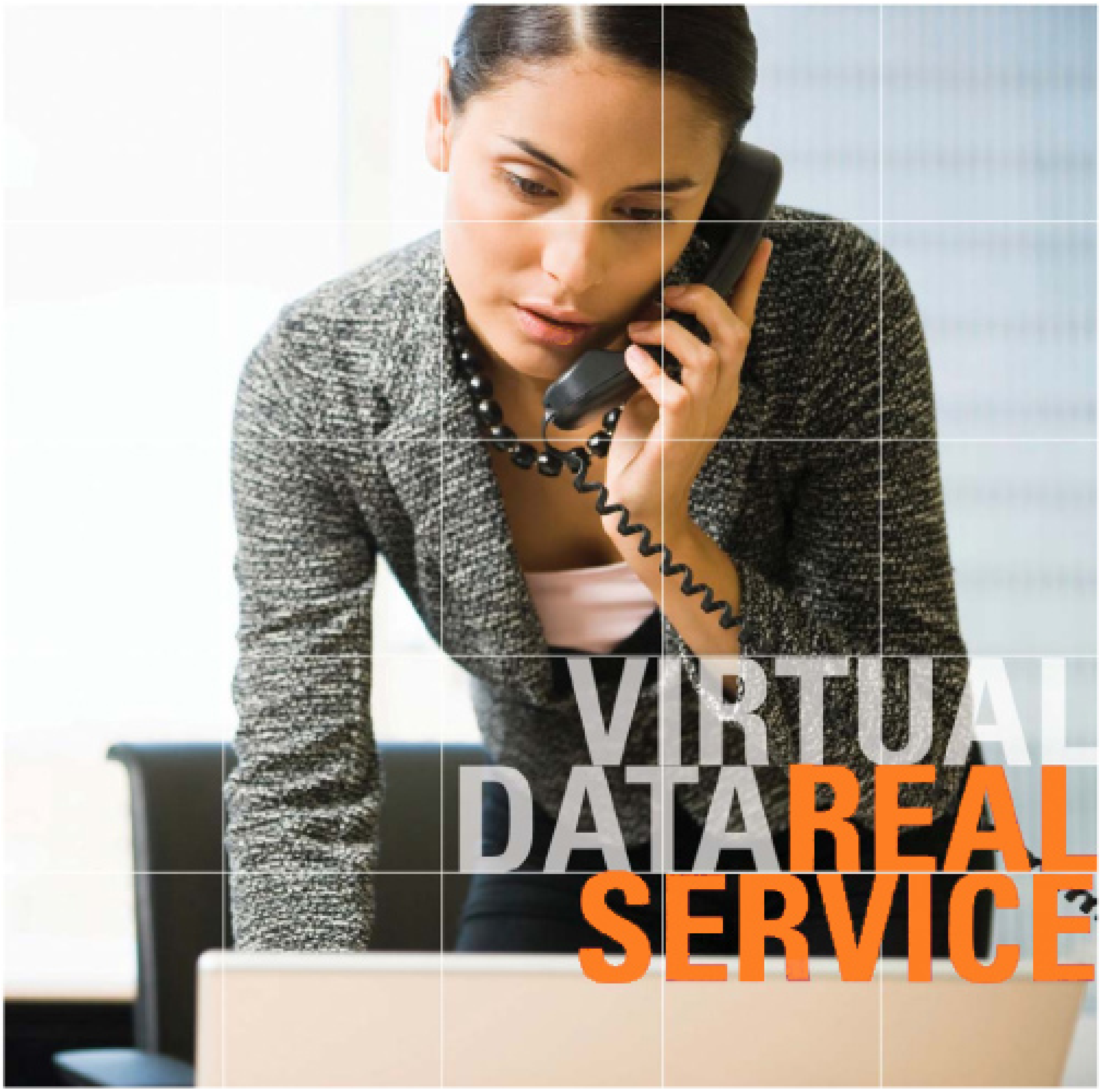


SmartRoom™

Powered by bmcgroup

User Manual

For SmartRoom Managers

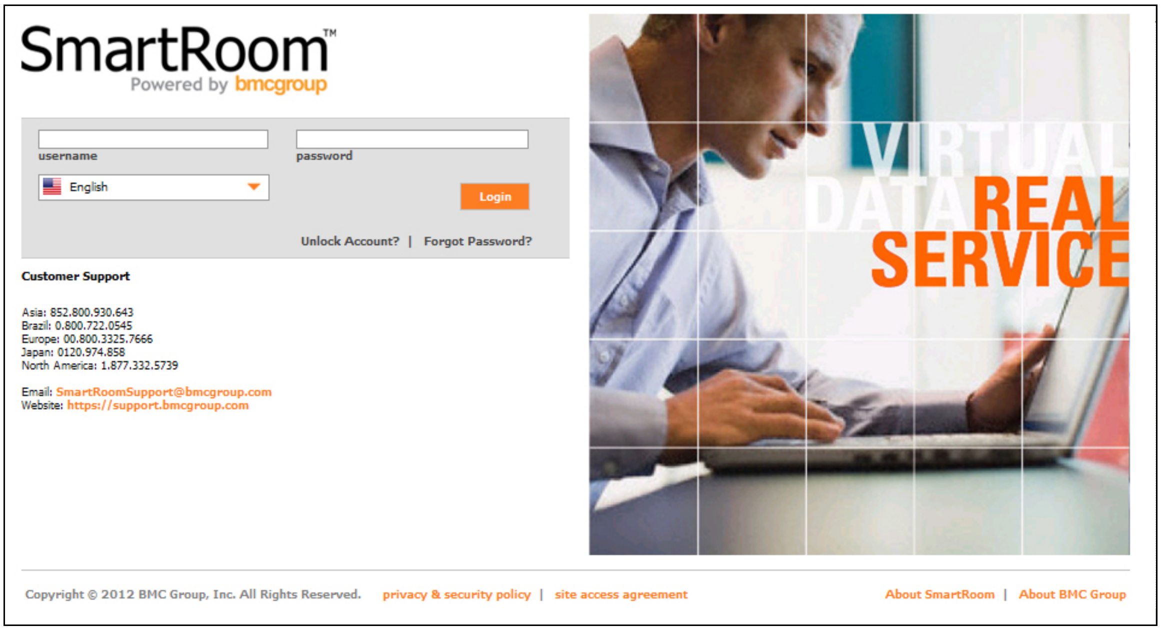
Table of Contents

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.

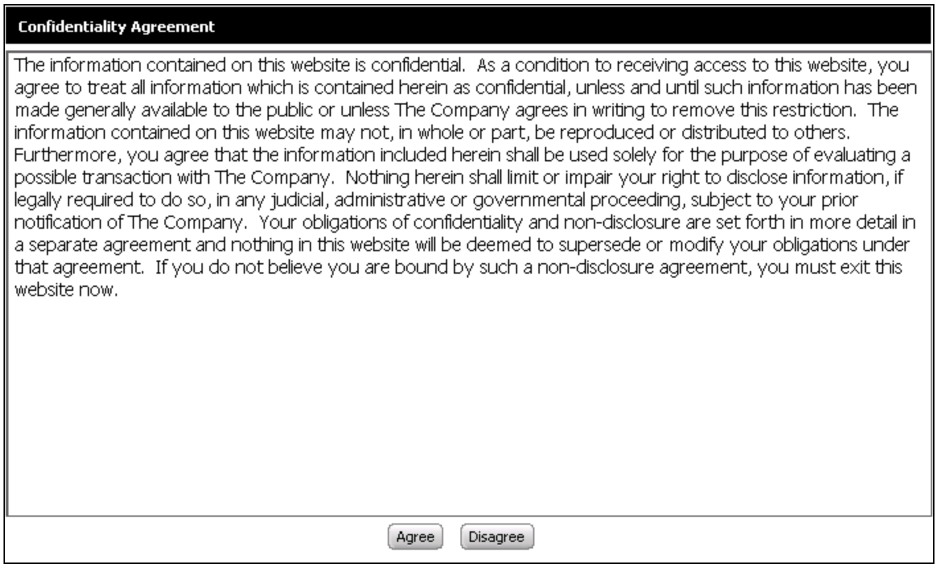
If you experience login problems please call or email our Customer Support Team using the contact information provided on the login page.



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 your SmartRoom.



3.0 Software Installation

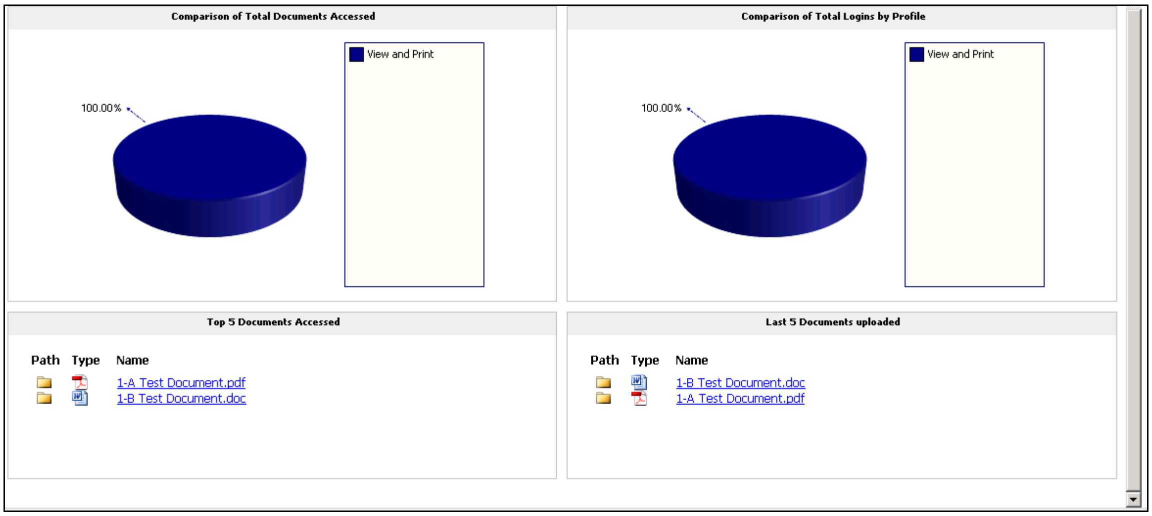
First time users will need to download and install the latest version of the Java Runtime Environment (JRE) in order to appropriately view, print, and/or save documents within the SmartRoom. Although most workstations already have the appropriate software installed, the software can easily be downloaded 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 for further troubleshooting tips or you can reach out to us directly at 1-877-332-5739 or SmartRoomSupport@bmcgroup.com.

4.0 Dashboard

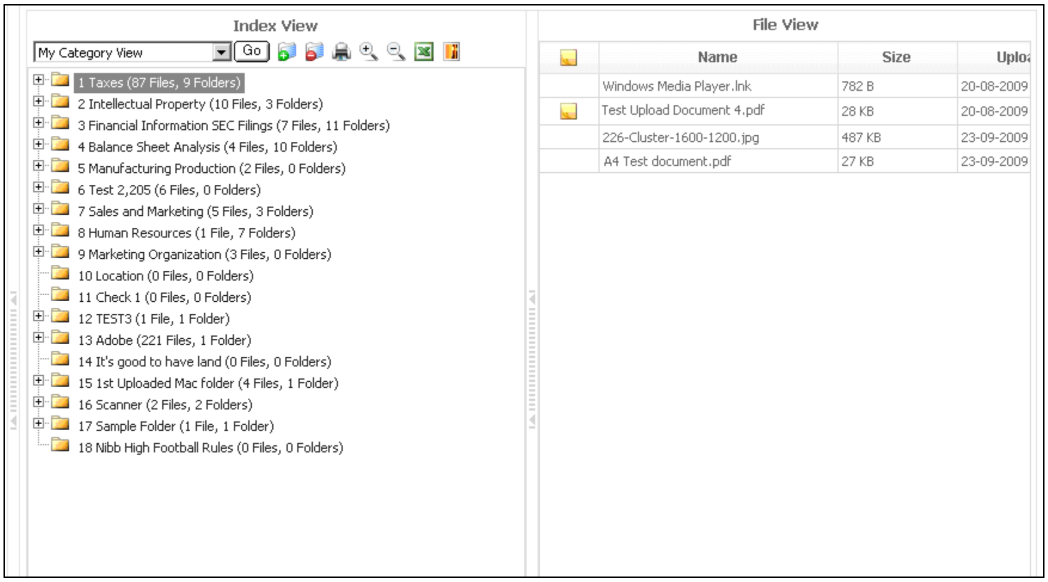
When enabled, the Dashboard provides the SmartRoom Manager the option to immediately review the latest activity of the external users through the use of different graphs and table as shown below.

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.



5.0 Document Review and Index Maintenance

5.1 VIEW BY INDEX



5.1.1 Index View

'View by Index' will display the SmartRoom index under the '**Index View**' pane. You are able to view the index for each category by selecting from the drop down menu labeled '**My Category View**'.

You can expand and collapse individual folders and sub-folders by clicking on the icons.

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

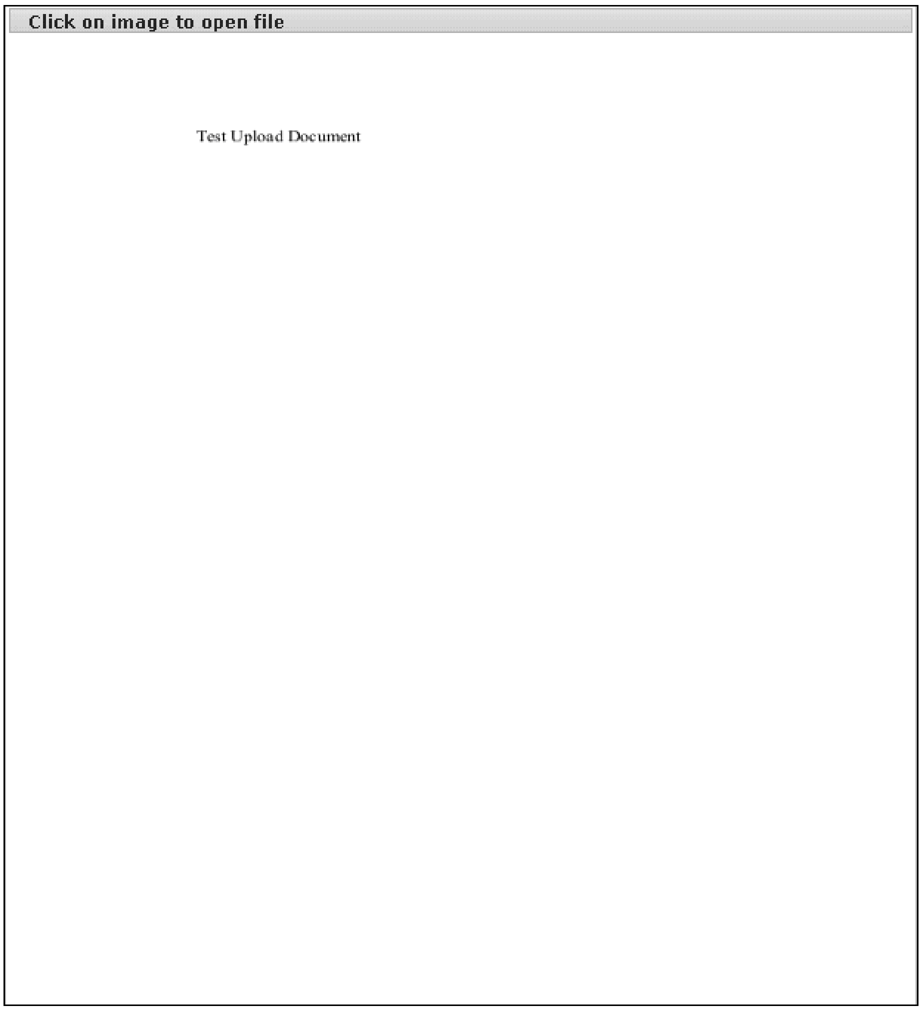
Documents will be visible below the expanded folder with the symbol on the left of each document name denoting file type.

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.

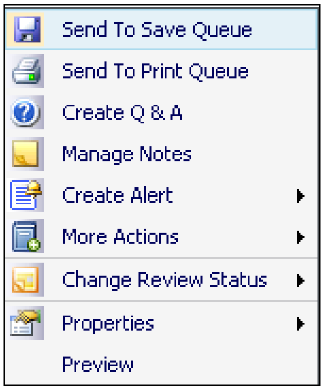
SmartRoom Manager’s decide if they would like the First Page Preview enabled. Your SmartRoom may not have this feature enabled by default.



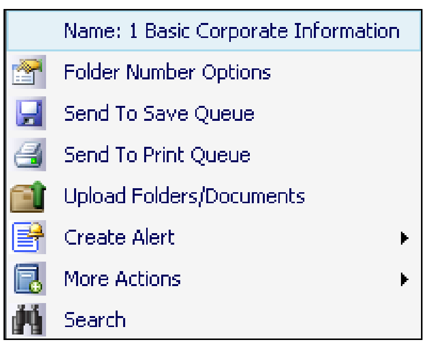
To ensure you can access this feature, if enabled, please check the box '**Allow Preview File**' under **My SmartRoom > Account > Options** tab.

To display the first page Preview, please perform the following:

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

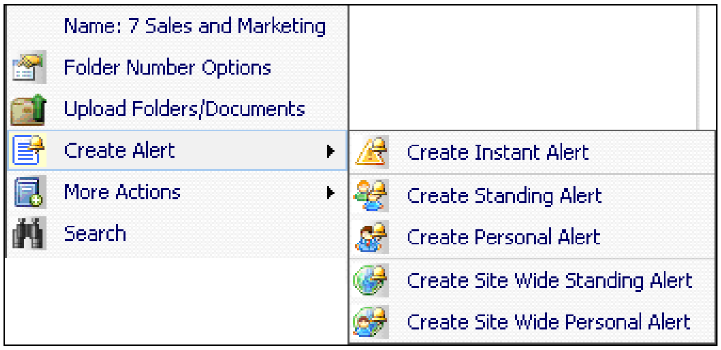


5.1.3 Additional Right-Click Controls



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

Folder numbering options	Manage the document numbering within the folder
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
Create Q & A	Create a Q&A query referencing the folder
Upload Folders/Document	Upload file and/or documents using the drag and drop uploader
Create Alert	Create a personal, standing, or instant alert
Search	Perform a basic search of the folder
Advanced Search	Perform an advanced search of the folder



Create Instant Alert	Create an instant alert to specified users
Create Standing Alert	Create standing alert in the selected folder level
Create Personal Alert	Create a personal alert folder level
Create Site Wide Standing Alert	Create a site wide alert in the SmartRoom
Create Site Wide Personal Alert	Create a site wide personal alert

More Actions:

Rename the folder

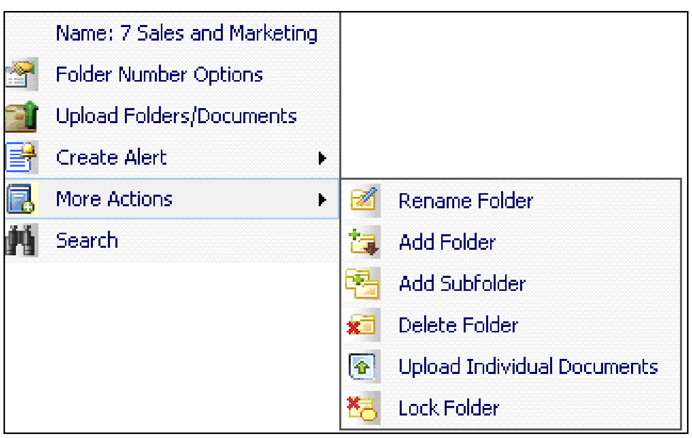
Add a folder below the current folder

Add as subfolder to the current folder

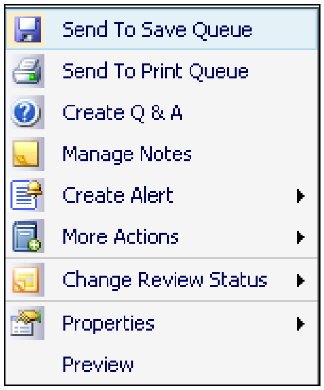
Delete the folder

Upload individual documents to the folder

Lock folder with its respective user rights



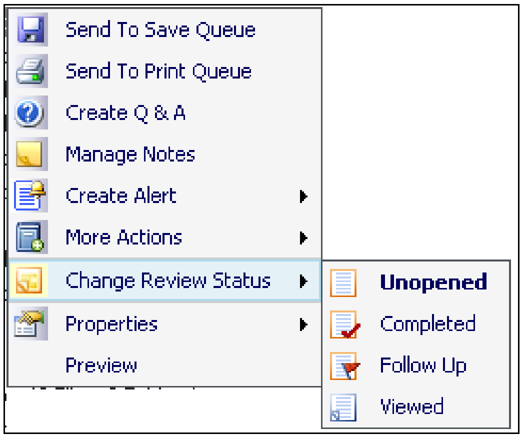
Right-clicking on the **document** name will bring up the follow functionality:



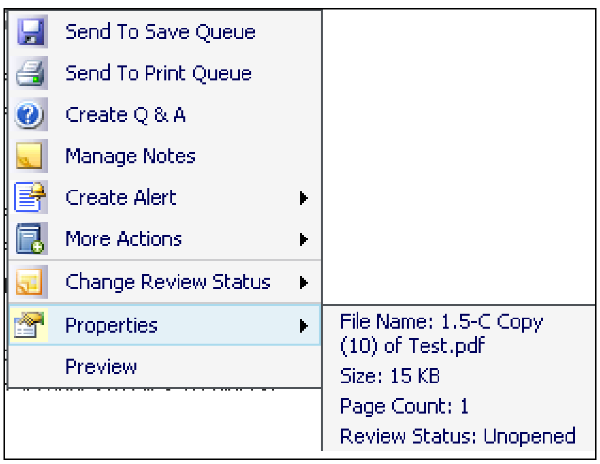
Send to Save Queue	This will send the selected to the Bulk Save Queue
Send to Print Queue	This will send the selected to the Bulk Print Queue
Create Q & A	Create a Q&A query referencing the document
Create Alert	Create a personal, standing, or instant alert
Manage Notes	Add a Global or Personal Note to the document
More Actions	

Rename File	Rename the file
Edit File Description	Make changes to the document description
Delete File	Delete the document from the index

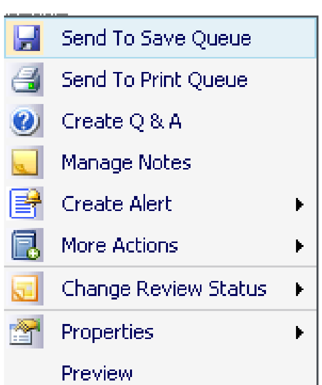
Change your review status of the document



View the file properties of the document



View a preview of the document

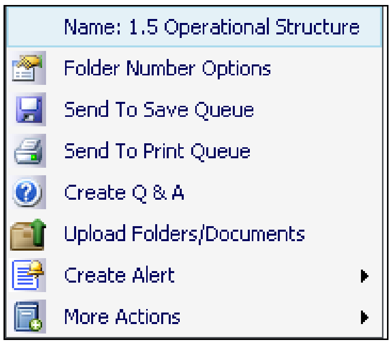


5.1.4 Uploading documents within the Index View

Drag and Drop Uploading

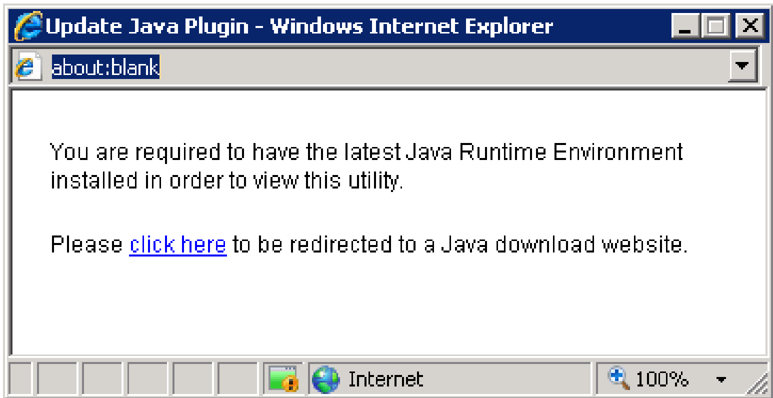
Drag and Drop Uploading is a feature of the SmartRoom that eliminates the need for extra software or navigation in order to upload documents directly to the index. This function applies to users with specific document upload rights.

Right-click on the folder that you wish to upload to as shown below.



Once a destination folder has been selected the VDR Drop Zone window will open:

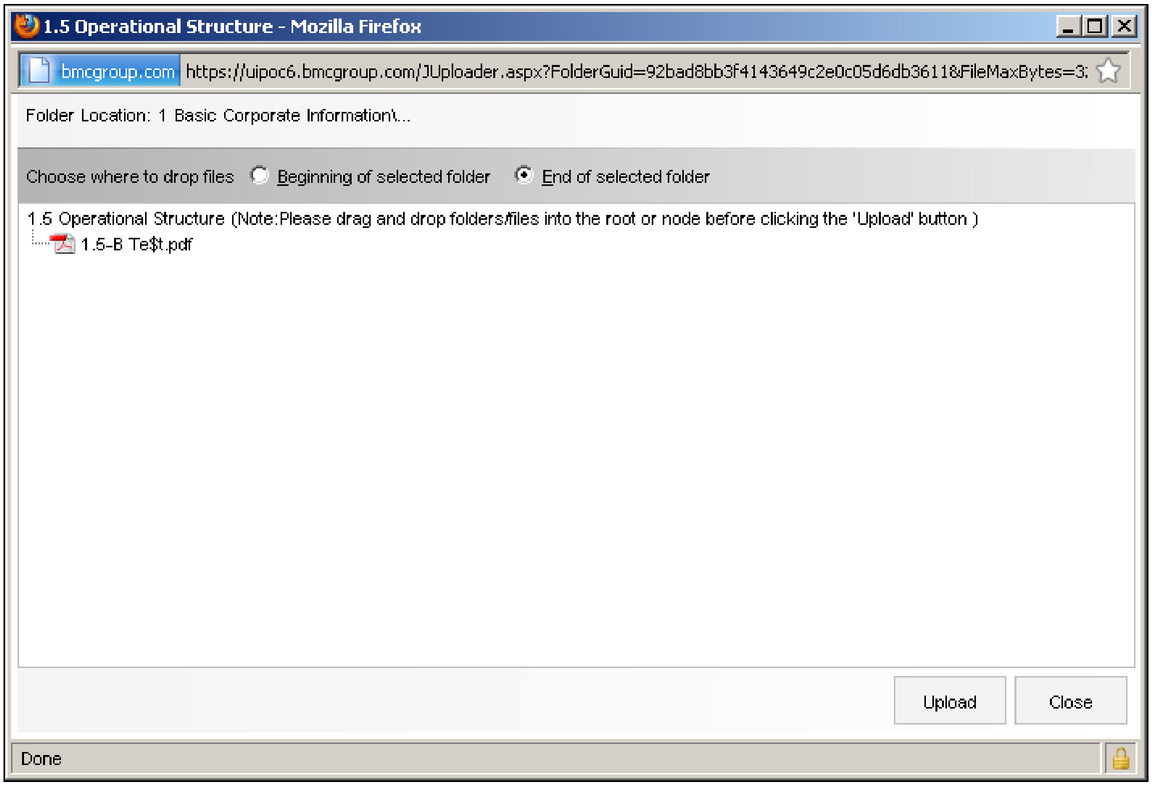
If you do not have the proper Java software installed you will be prompted to add it. Please click on the link stating '**Click here**' and follow the instructions. You may need to contact your IT department depending on what level of access rights you have to your workstation.



With the destination folder selected all you need to do is drag over the documents from your desktop or any other folder located directly on your workstation into the SmartRoom Drop Zone window.

- Each Document Type will be presented with the File Type icon.
- There will be destination folder path on the top of the SmartRoom Drop Zone
- Items will be presented in SmartRoom Drop Zone in the following order:

  Listed first are all the documents in the uploaded Folder, then all subfolders. All items in subfolders will follow the same display rule.
- Items are presented in a Tree Structure.
- You have the ability to reorder files and folders to reflect the desired order and location that items should be uploaded.



After the files/documents are in their proper position, click '**Upload**' to start the upload process.

Users are presented with right-click item menu on the File Tree. The options are:

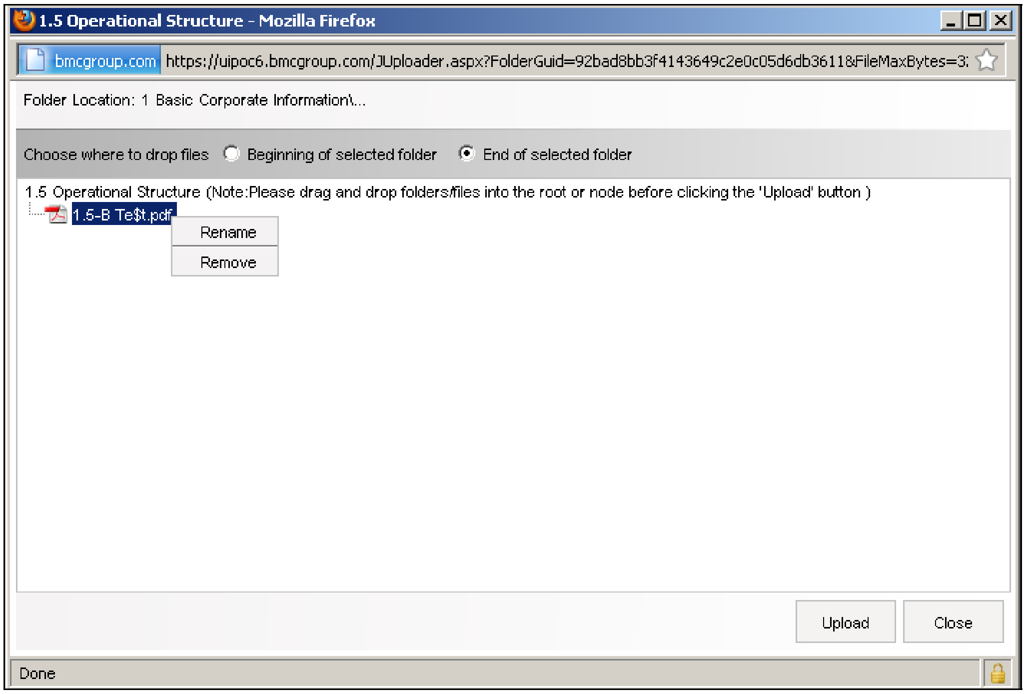
File:

- Rename
- Remove

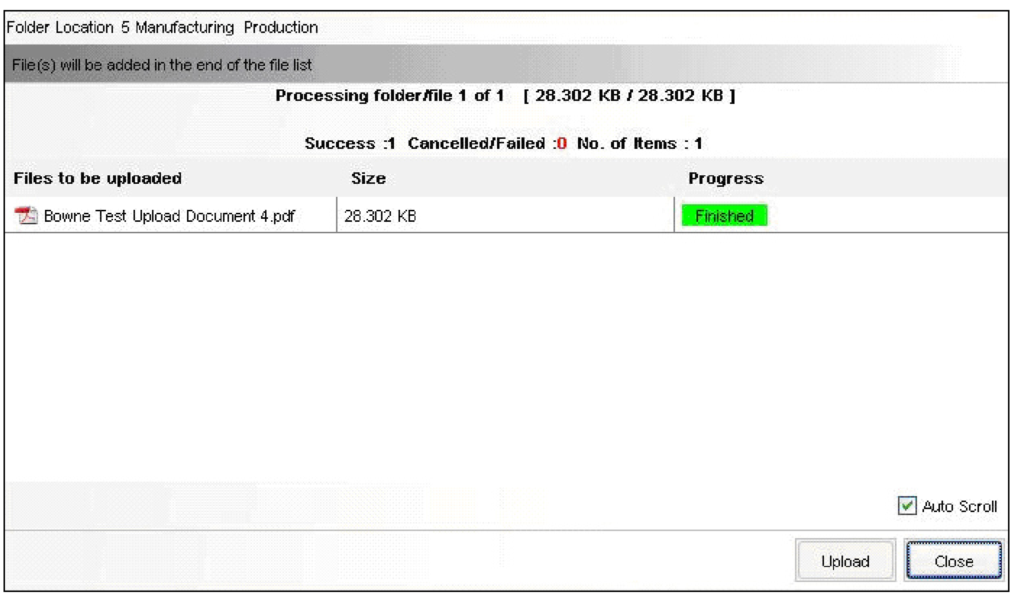
Folder:

- Rename
- Add New Folder
- Remove

Note: a document must be added before any folder functions can be completed.



Once the upload is complete each item will be displayed as ‘Finished’ or ‘Failed’.



Once you close the VDR Drop Zone window the index will refresh and the new files will be available to the users that have access to that parent folder.

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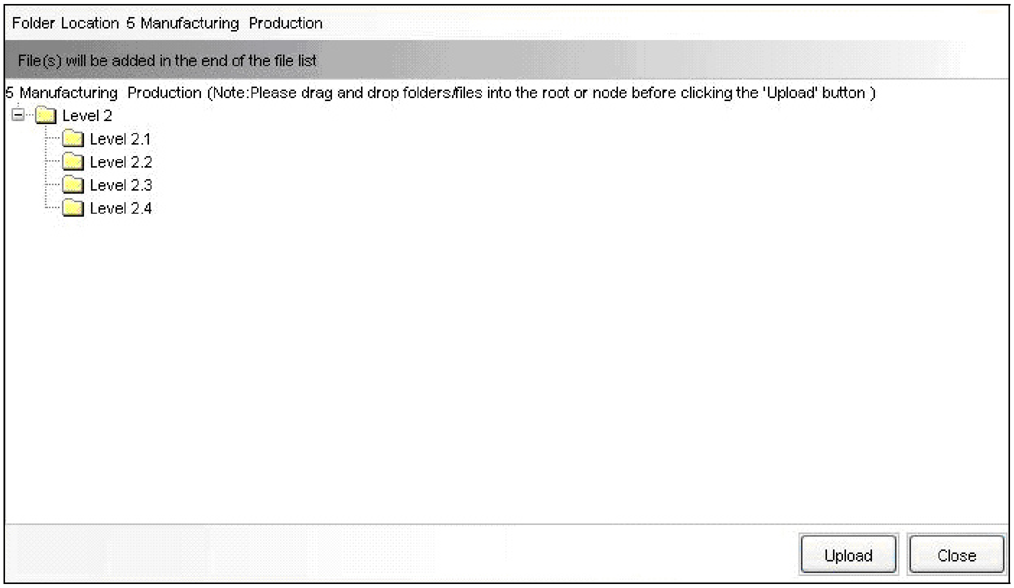
Please note that you can add multiple folders and files to the Drop Zone Window and rearrange accordingly before selecting the '**Upload**' button.



5.1.5 Index Maintenance via Drag and Drop

Drag and Drop within the index (DnD)

DnD is a function that allows complete manipulation of the index, including folders and files, without having to leave the index or open other software.

In order to enable Drag and Drop (DnD) capability within the index users need to switch to DnD mode. The DnD mode icon will be located in the same toolbar as other icons.

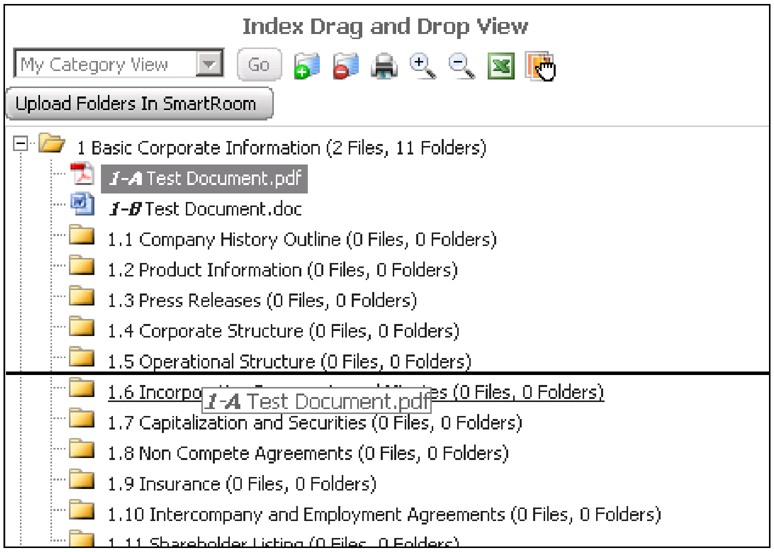
When DnD mode is activated,  document click is disabled on the index. So when you click on a document, instead of viewing it, users will be able to select and drag it.

When DnD mode is enabled, the DnD mode icon replaces the View Mode icon. Click on the same icon to get back to View Mode

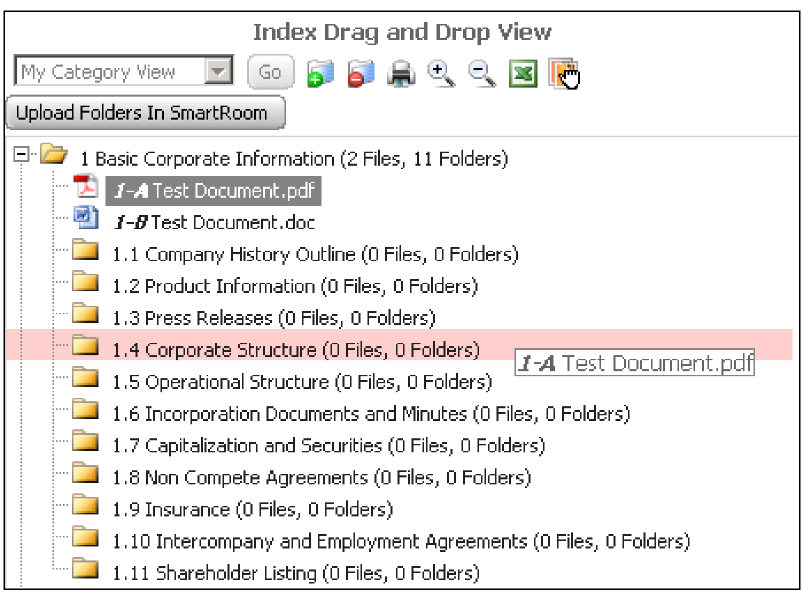
Users can expand and collapse folders, export to Excel™, print, zoom in and zoom out, view folder and file counts.

Users are not able to view the indices of other security profiles in DnD Mode.

Files and/or Folders can be moved between folders using drag-and-drop. Users will activate a file or folder drag by clicking a file(s)/folder(s) holding down the left mouse button while moving the mouse. To move a folder/file below or above another folder, users will see a black line indicating as such.



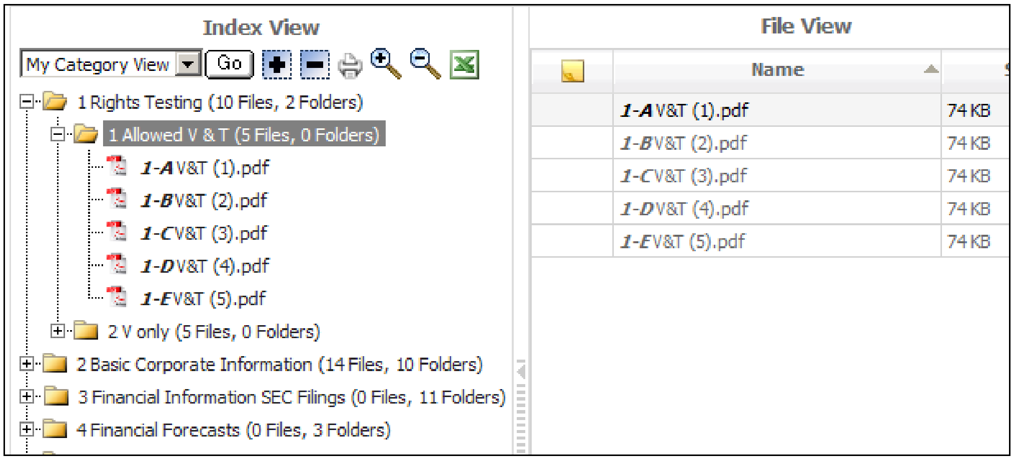
To move a file into a folder or subfolder users will hover directly over the appropriate folder and this will create the highlight shown below. When users hover long enough the hover over will also expand the folder being hovered over to move into subfolders.



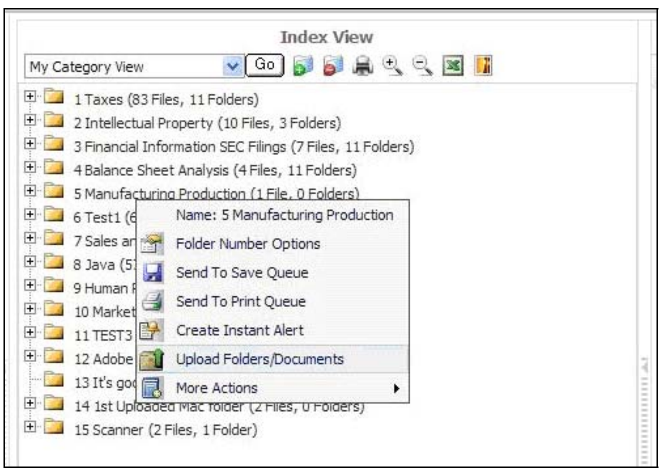
Users will see the mouse cursor change, and the name of the file/folder is displayed next to it.

Items can be dropped inside or between the Index items.

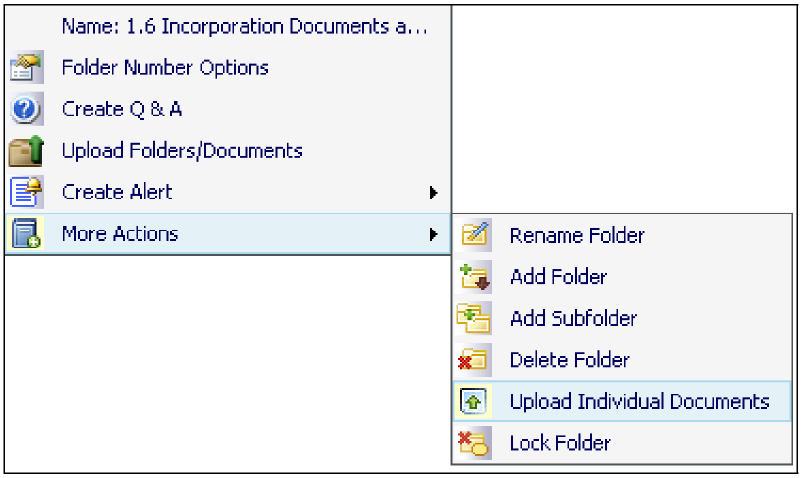
File(s) can be selected to be moved from File View on a right side of the screen as well as from expandable Index View.



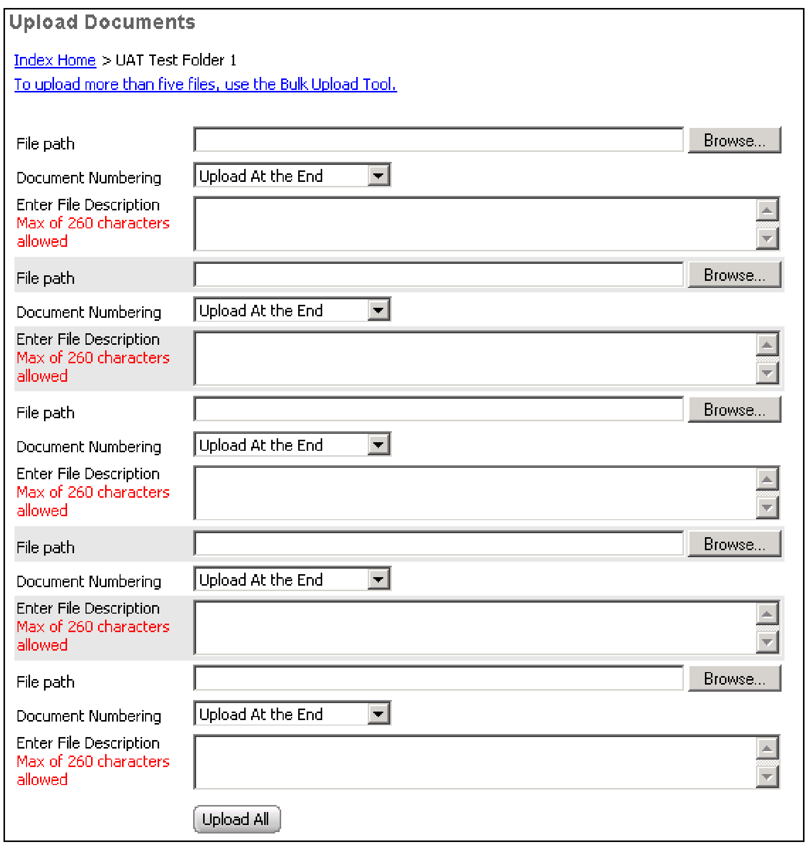
While in the DnD mode users will be able to access the Drop Zone Window and upload documents.



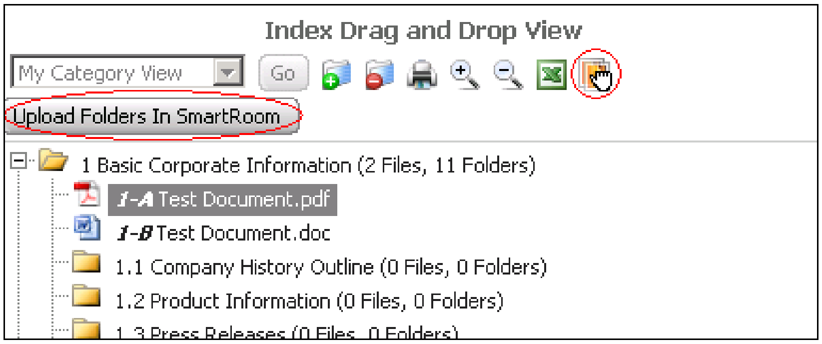
Alternately, users can upload individual documents as seen below.



To upload files simply browse to the location of up to 5 documents and then click the upload all button. This will upload the files to the selected folder.



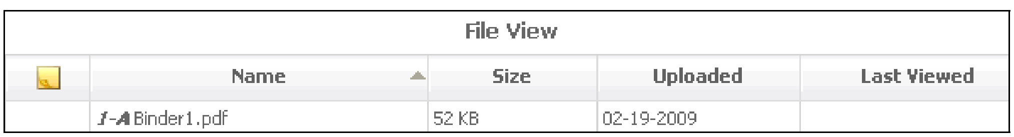
In addition to the functions above, once DnD is enabled you will have the option to upload a parent folder to the bottom of the index using the button shown below.



Once the button is selected please use the drag and drop button to upload documents as you normally would. This offers fewer clicks then having to create a parent folder using the right-click 'add folder' function

5.1.6 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.

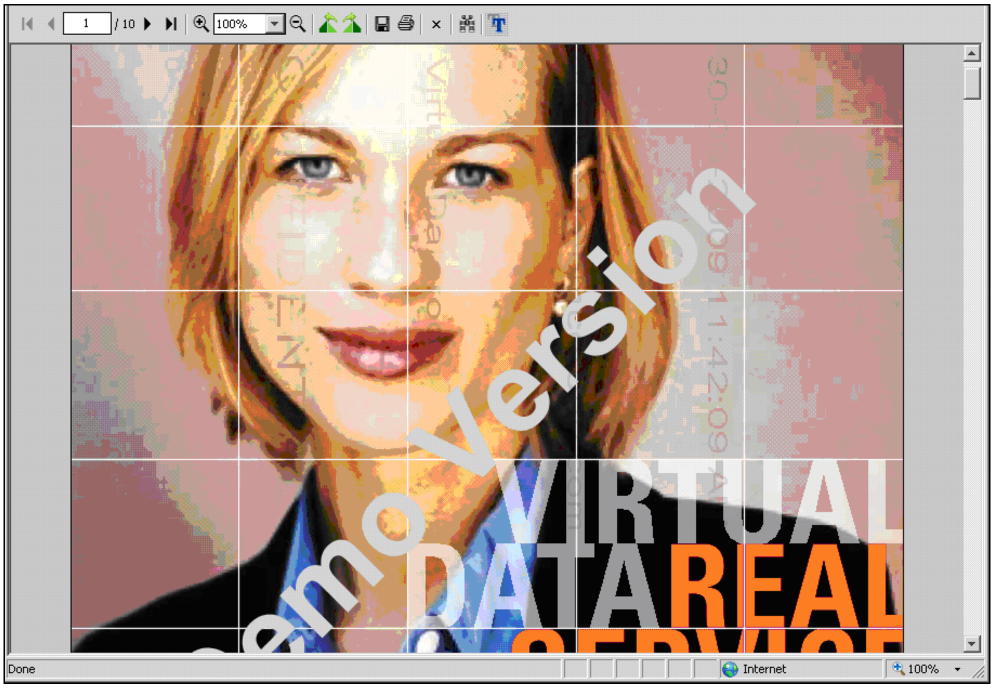


The details include: The document name, document file size, date it was uploaded, last time you viewed or printed the document. Each of these columns can be sorted by clicking on the respective column heading.

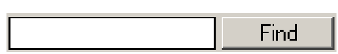
Clicking on the document name will open the document in a separate window.

5.2 DOCUMENT VIEWER

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



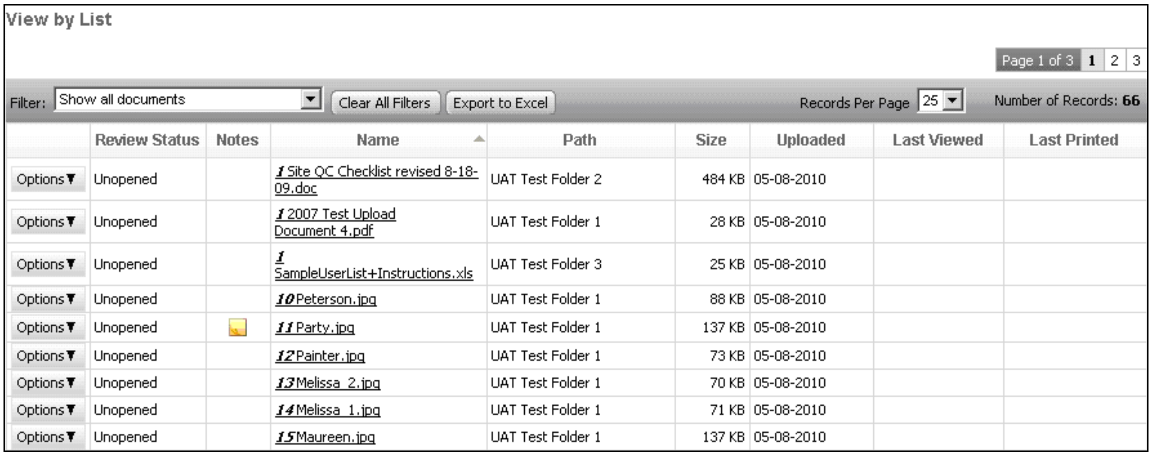
Document Viewer Controls:

Navigate through the document	Side Scroll bar
Zoom in and out	
Rotate the document	
Print	
Save	
Word and phrase search	
Download additional font packs	

(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.



	Review Status	Notes	Name	Path	Size	Uploaded	Last Viewed	Last Printed
Options▼	Unopened		1 Site QC Checklist revised 8-18-09.doc	UAT Test Folder 2	484 KB	05-08-2010		
Options▼	Unopened		1 2007 Test Upload Document 4.pdf	UAT Test Folder 1	28 KB	05-08-2010		
Options▼	Unopened		1 SampleUserList+Instructions.xls	UAT Test Folder 3	25 KB	05-08-2010		
Options▼	Unopened		10 Peterson.jpg	UAT Test Folder 1	88 KB	05-08-2010		
Options▼	Unopened		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▼	Unopened		14 Melissa_1.jpg	UAT Test Folder 1	71 KB	05-08-2010		
Options▼	Unopened		15 Maureen.jpg	UAT Test Folder 1	137 KB	05-08-2010		

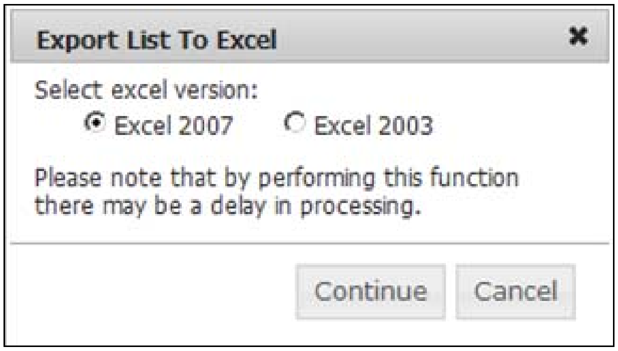
Clicking on the options Options▼ box will bring up the options for creating a document note, printing, saving and creating a Q&A inquiry for that document. This can also be done by right-clicking on the file name.

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.

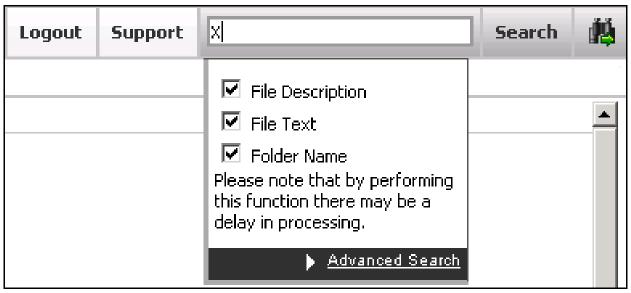
The **“Export List”** tab gives you an option as to what excel version you would want the file to be saved.



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.

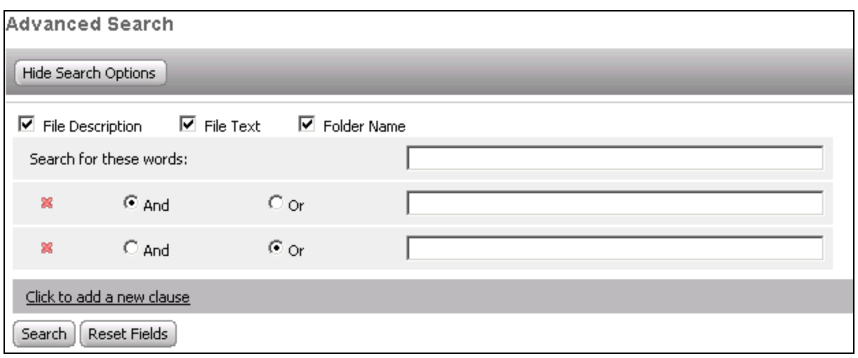
You are also given options to define your search as shown below.



5.4.1 ADVANCED SEARCH

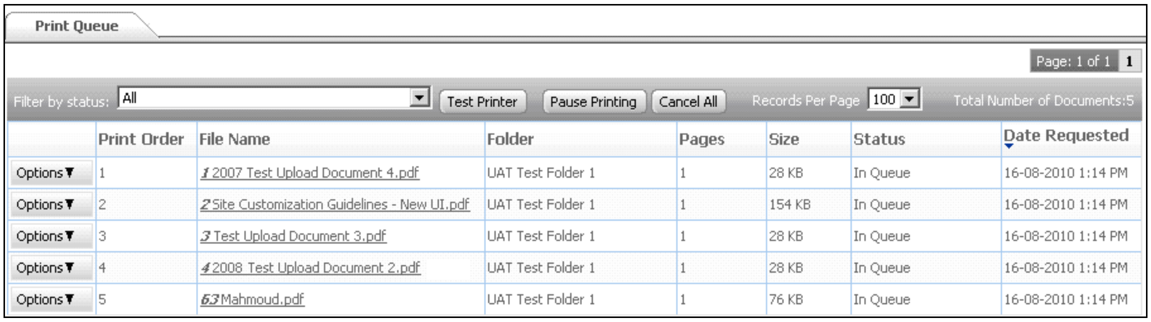
In addition to the standard search, users have the ability to complete an advanced search by clicking the Advanced Search link on the drop down. It is also possible to right click within the index on a specific folder and select Search and then Advanced Search

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.



5.5 PRINT QUEUE

If you send multiple documents to the print facility, you will be able to manage the Print Queue. A list of all documents sent to the printer will be displayed and you may sort the list by any of the parameters in the header. Clicking on the options Options▼ button will give you the option of pausing, moving or canceling the document scheduled to print.



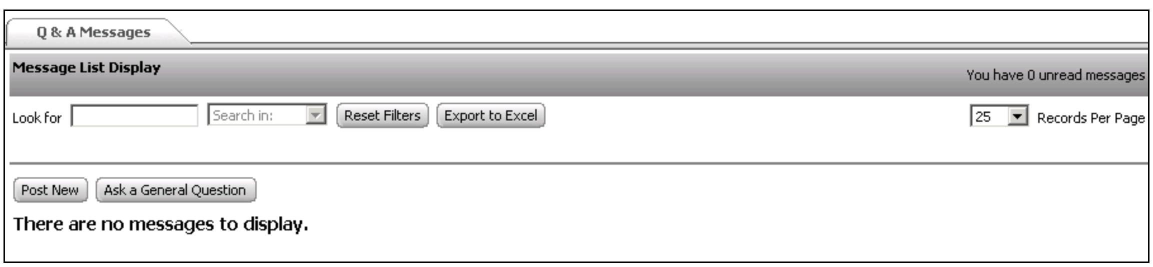
	Print Order	File Name	Folder	Pages	Size	Status	Date Requested
Options▼	1	1 2007 Test Upload Document 4.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM
Options▼	2	2 Site Customization Guidelines - New UI.pdf	UAT Test Folder 1	1	154 KB	In Queue	16-08-2010 1:14 PM
Options▼	3	3 Test Upload Document 3.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM
Options▼	4	4 2008 Test Upload Document 2.pdf	UAT Test Folder 1	1	28 KB	In Queue	16-08-2010 1:14 PM
Options▼	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.

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.



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 Excel™ document.

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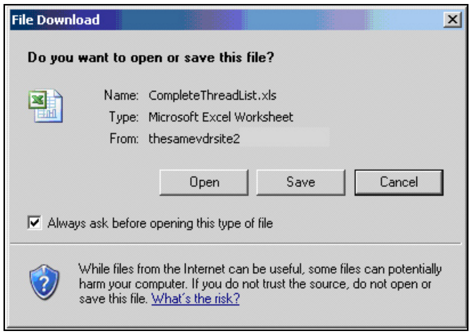
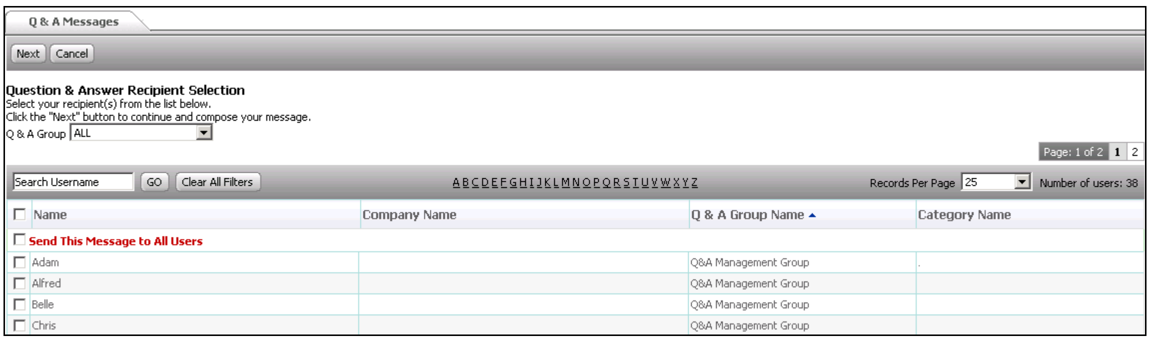


We can send a general question or response to selected members of the SmartRoom by checking the box alongside their name or to all users by checking **Send This Message to All Users**.

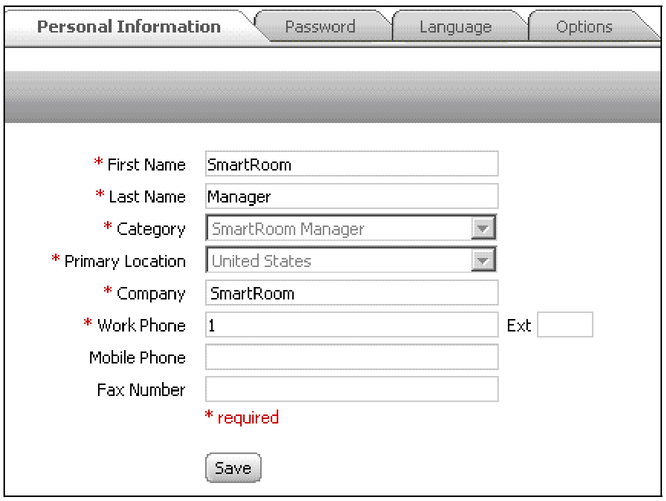


6.0 My SmartRoom

6.1 ACCOUNT

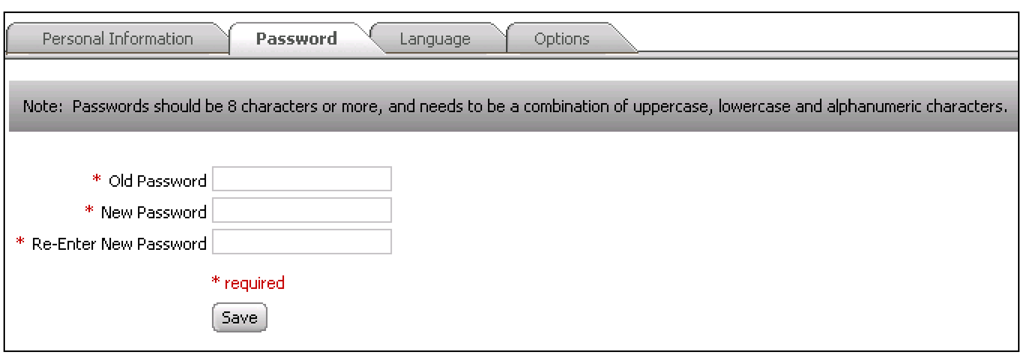
6.1.1 Personal Information

Please check and edit your personal details here.



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.



6.1.3 Language

The choice of languages available in your SmartRoom is determined by the Deal 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.

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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

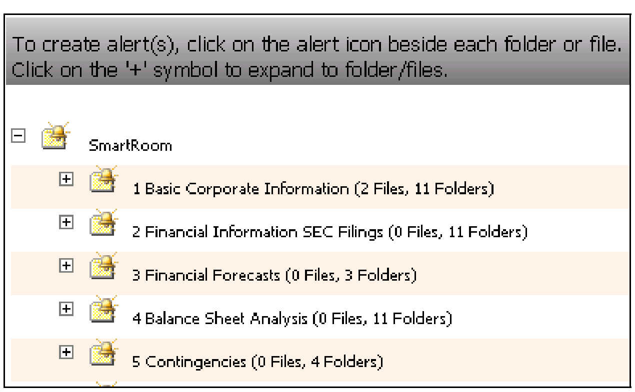
6.2.1 Personal Alerts

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 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 icon to cancel the alert.

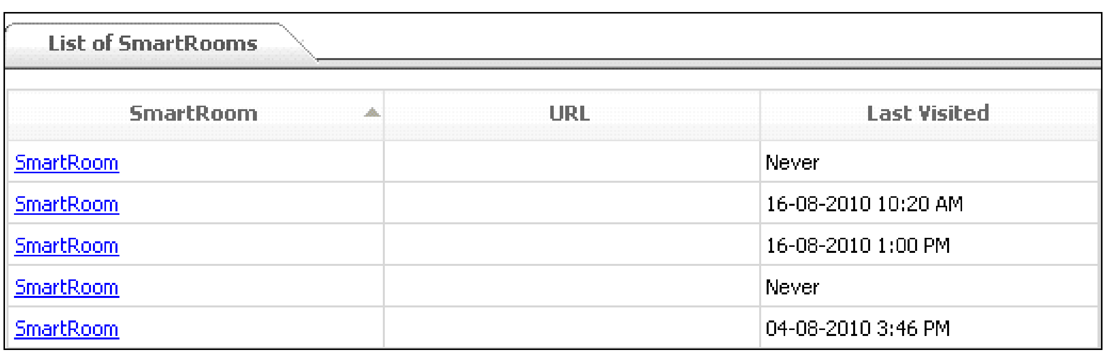
To edit an existing alert, click on the next to the alert. To delete an alert, click on the next to it.

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.

6.3 LIST OF 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.



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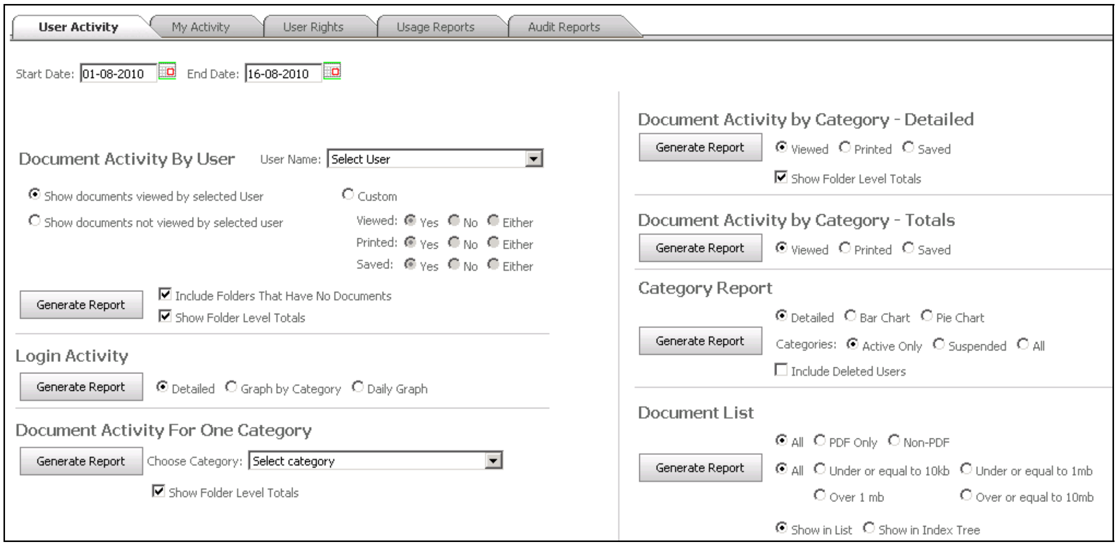
7.0 Reports

7.1 USER ACTIVITY



Document Activity by User

These reports show us whether a specified user has viewed, printed or saved documents within a specified time frame.

User name

Select a user from the drop down menu.

Show documents viewed by selected User

The report will show us the document index with a green tick ✔ representing the documents the selected user has viewed.

Show documents not viewed by selected user

The report will show us the document index with a red cross ✖ representing the documents the selected user has not viewed.

Custom

We can create a combined report which will show us the documents a user has or has 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.

Login Activity

These reports give us an idea of the login activity of users in the SmartRoom

Detailed

A report will generate a list of each user, their name and category, the time and date of their last login and the duration of their longest login.

Graph by Category

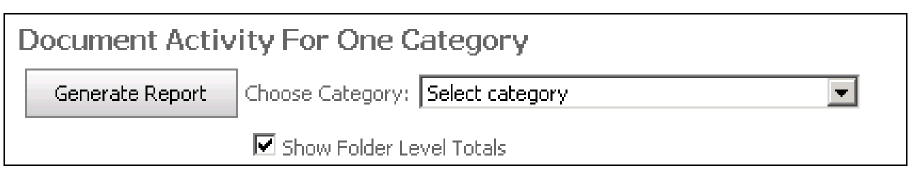
The report will be displayed as a bar chart that compares the total logins and the amount of time spent in the SmartRoom by category.

Daily Graph

The report will be a line chart displaying the amount of logins to the SmartRoom per day.

Document Activity for One Category

A report of the documents viewed, printed or saved per selected category.



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.

Document Activity by Category - Detailed

A report of the documents viewed printed or saved by category.

Show Folder Level Totals

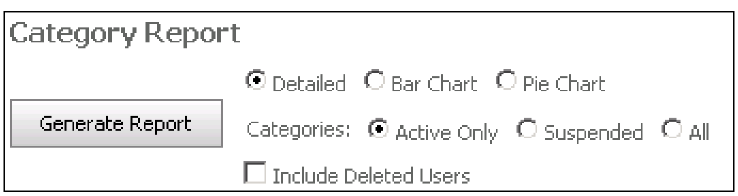
This check box will determine whether the total number of documents for each folder and its subfolder(s) will be evident in the reports.

Document Activity by Category - Totals

A report of the total numbers of times a category has viewed, printed, or saved a document.

Category Report

A report of the total number of users per category and the number of users per category that have logged in, not logged in, or logged in, but no activity.



There is the option to display this information numerically, Detailed, a Bar Chart or a Pie Chart.

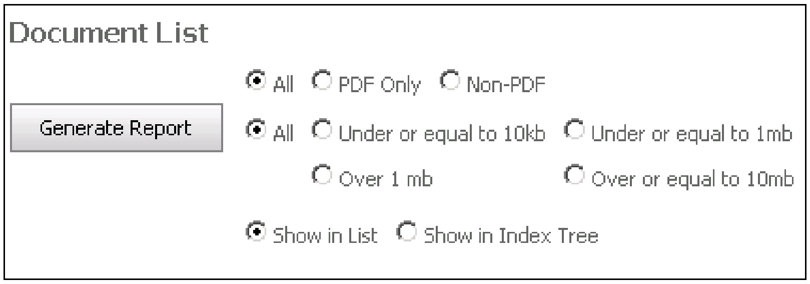
Categories

One can choose to report on Active categories only, Suspended categories only or All categories.

There is also the option to include deleted users on the report.

Document List

This report shows us a list of documents displaying the file type and size.



File Type

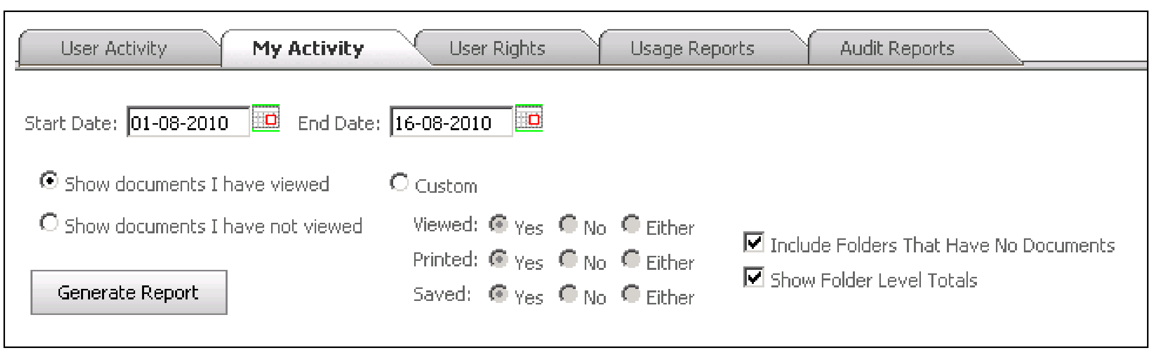
We have the option to display all documents, PDF documents only, or Non-PDF documents.

File Size

We also have the option to display documents under or equal to 10kb, Under or equal to 1mb, Over 1mb or Over or equal to 10mb in size.

The documents can be displayed as a list or in the Index Tree format.

7.2 MY ACTIVITY



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

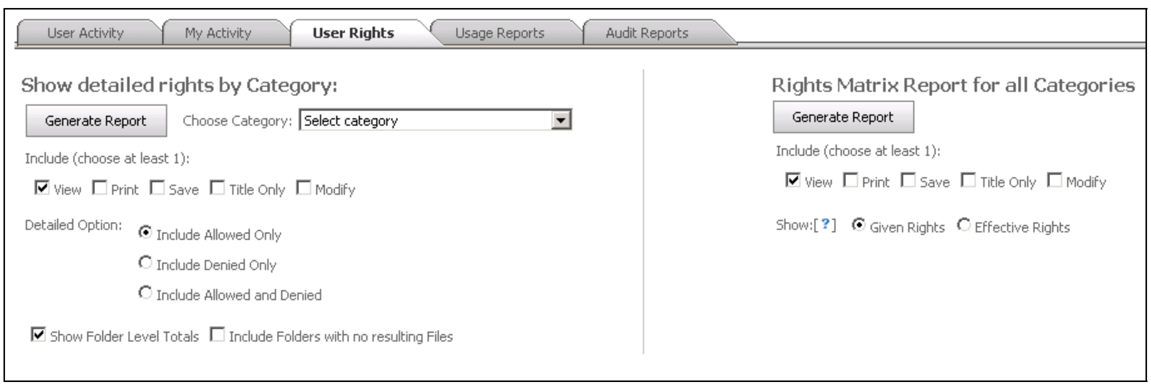
This check box will determine whether the folders that contain no documents will show up on the document index of these reports.

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.

7.3 USER RIGHTS

User Rights reports allow for SmartRoom Manager to run specific and detailed reports regarding the layout of each user's individual or categorical rights.



Show detailed rights by Category

This feature allows users both SmartRoom Manager and Admin to track precise details of the access of users in the SmartRoom.

View/Print/Save/Title Only/Modify option – Creates a report that is specific to the rights selected and displays those rights for the selected category.

Detailed Option:

Include 'Allowed' only - provides the number of documents a particular category has been provided with either view, print, or save access to the document.

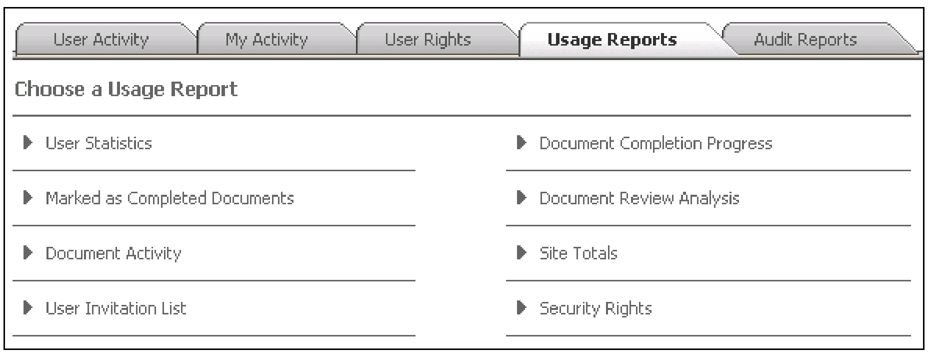
Include 'Denied' only - provides the number of documents the selected category has been denied access to.

Include ‘Allowed’ and ‘Denied’ - shows report for documents which have been allowed for and restricted from viewing/ printing/ saving from the selected category.

Rights Matrix Report for all Categories

This report displays a table with all categories in a manner similar to the Security Rights settings. Clicking the checkbox of either the View, Print, Save, Title Only and Modify displays which category has been provided with these rights.

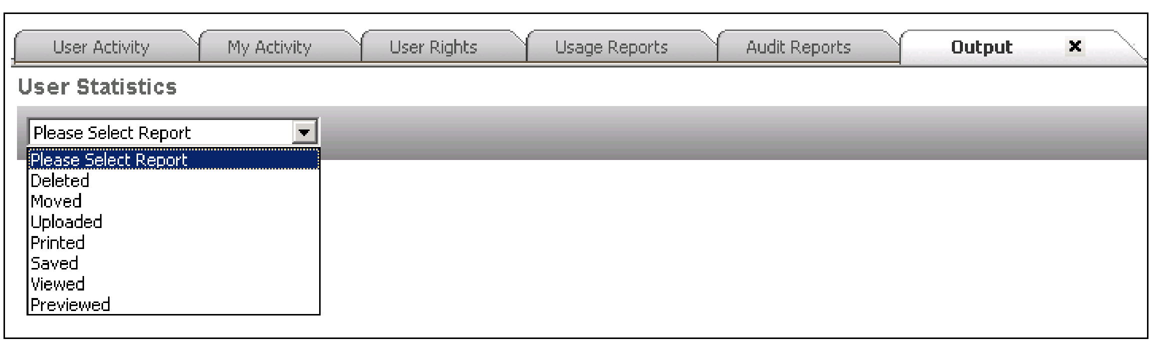
7.4 USAGE REPORTS



These reports show various usage information recorded by the individual users of the SmartRoom.

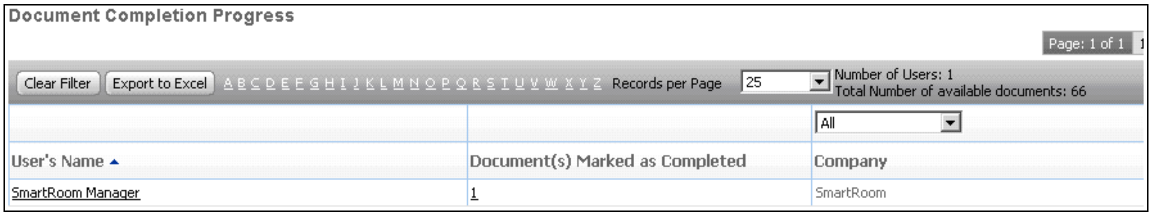
7.4.1 User statistics

You will be able to create usage reports by selecting an option from the drop down menu. These reports will include the activities of all users in the SmartRoom and can be exported to Excel™.



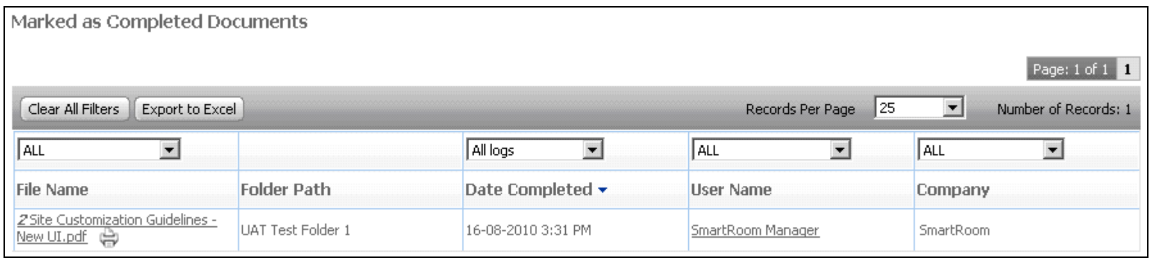
7.4.2 Document Completion Progress

This report lists each user's name, their company and the number of documents they have changed to '**Completed**'. You can compare this to the number of documents in the SmartRoom.



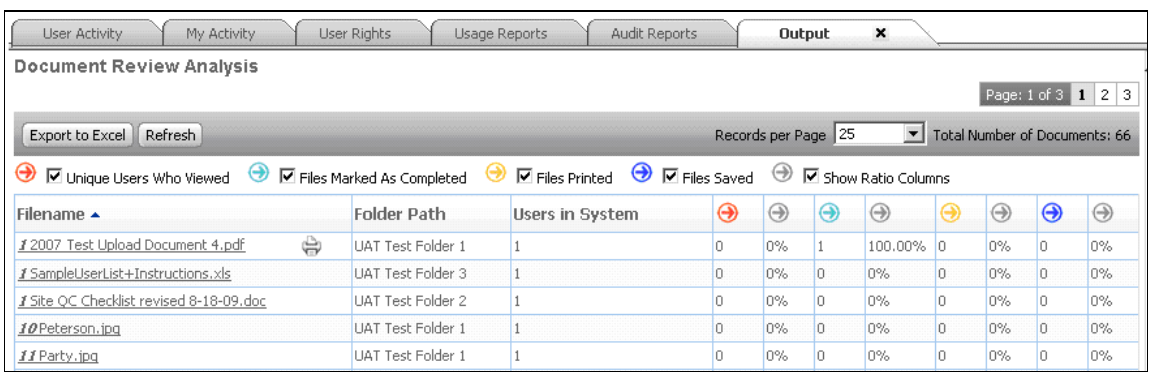
7.4.3 Marked as completed documents

This report gives a description of each document marked '**Completed**' by individuals, including the date and time this occurred.



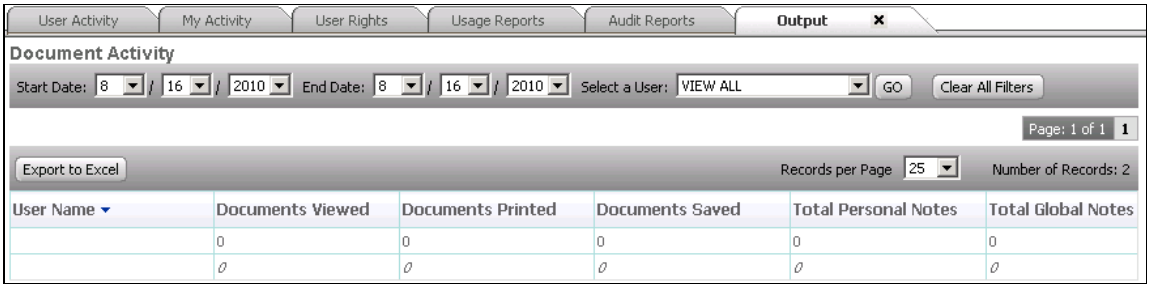
7.4.4 Document review analysis

Shows the popularity (by percentage) of all documents in the SmartRoom by displaying the number of unique users who have viewed, completed, printed and saved each document.



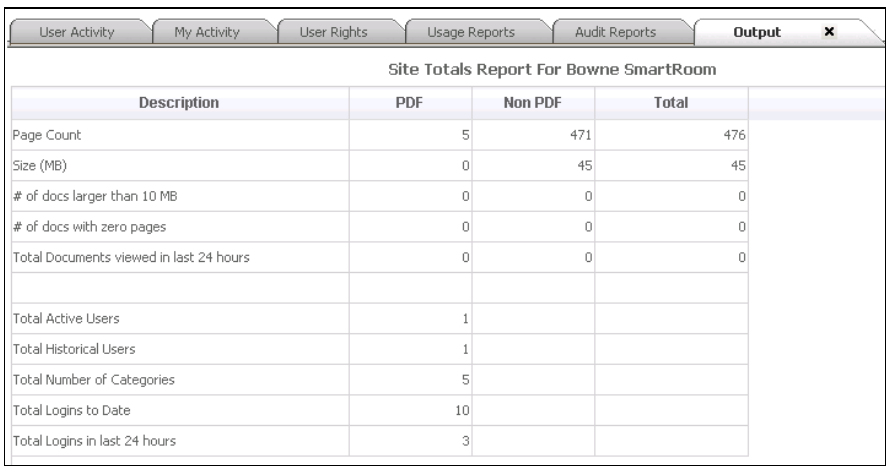
7.4.5 Document Activity

This report will list all users in the SmartRoom and their document activities (i.e. number of documents viewed, printed, saved and notes made).



7.4.6 Site totals

This report provides us with site totals which may be useful for project analysis, review and updates.



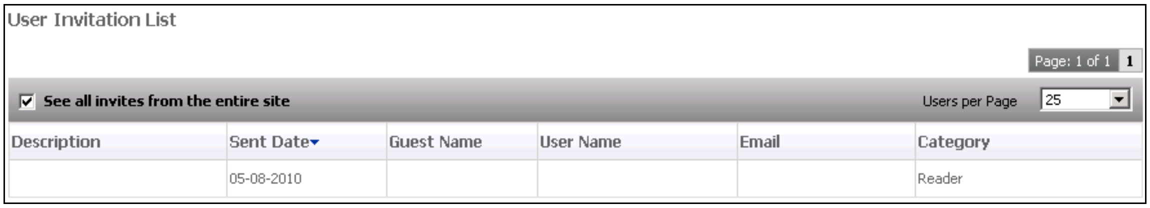
Site Totals Report For Bowne SmartRoom

Description	PDF	Non PDF	Total
Page Count	5	471	476
Size (MB)	0	45	45
# of docs larger than 10 MB	0	0	0
# of docs with zero pages	0	0	0
Total Documents viewed in last 24 hours	0	0	0
Total Active Users	1		
Total Historical Users	1		
Total Number of Categories	5		
Total Logins to Date	10		
Total Logins in last 24 hours	3		

Page count - displays the total number of pages of all documents, .PDF and non-PDF format.
Size (MB) - displays the total size of all documents.
# of docs larger than 10MB - displays the number of documents larger than 10 Mega Bytes. – The maximum recommended size.
# of docs with zero pages - displays the number of documents without content.
Total Documents viewed in last 24 hours - displays the number of documents viewed by users in the VDR in the past 24 hours.
Total Active Users - displays the number of users who have access to the SmartRoom.
Total Historical Users - displays the number of users who have had access.
Total number of Categories - displays the number of categories created in the SmartRoom.
Total Logins to Date - shows how many users have logged into the SmartRoom.
Total Logins in last 24 hours - shows how many users have logged in the past 24 hours.

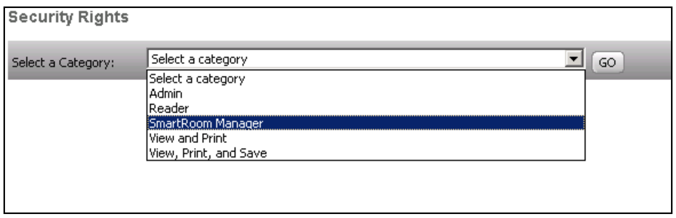
7.4.7 User invitation list

This list will show you the names of all the users that have been invited to the SmartRoom.

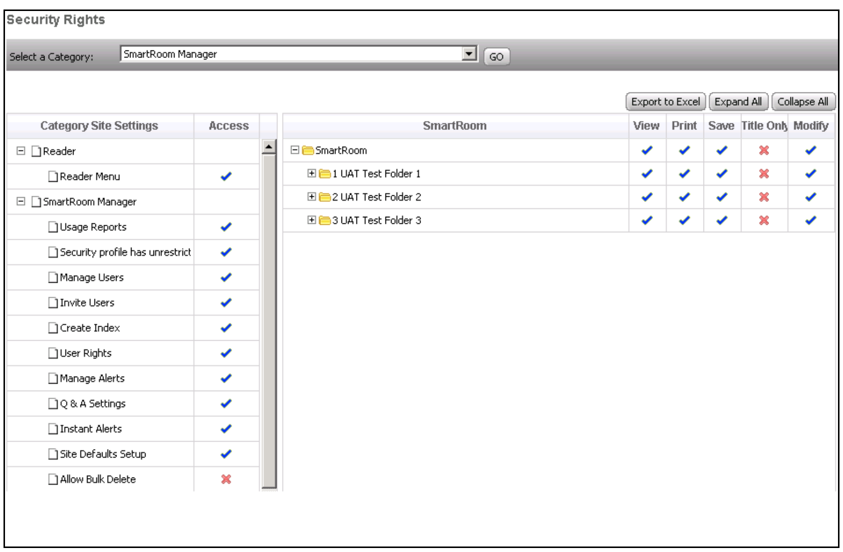


7.4.8 Security rights

Provides a user rights report for the selected category.



Select a category from the dropdown menu.



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Category Site settings

A ✔ denotes the category has access to a feature in the '**Category Site Settings**'

A ✖ denotes the category does not have access to the feature

SmartRoom Index

A ✔ alongside a folder or document denotes the category has the rights specified by the column.

A ✖ denotes they do not.

View	Ability to 'View' the folder/document
Print	Ability to 'Print' the folder/document
Save	Ability to 'Save' the folder/document
Title only	The category sees only the title of the document/folder
Modify	The category has the ability to modify/edit the contents of a folder/document.. (The category will also need the relevant site editing rights.)

7.5 AUDIT REPORTS

We can run various audit reports to track site activity and any configuration changes.

7.5.1 Site Invitations

This report will produce a list of all sent invitations. The list will include the date, time and by whom they were sent.

7.5.2 User Management

Any changes in the user category will be listed here. The list will include the date, time and by whom the user's category was changed.

7.5.3 User Logins

This will provide a report of all user login history. The list will include date, time, user category and the IP address they logged in from.

7.5.4 Client Machine Settings

Details of a user's local machine settings if they have run our Scanner Too software.

7.5.5 Configuration Management

A report on the site configuration settings changed and the time, date and name of user(s) who made the changes.

7.5.6 Folder Management

If you are interested in the history of a folder, use this report. Select the time period to report on and then chose from the index which folder you are interested in. A report will be generated only if the folder has been added/altered since the beginning of the SmartRoom. It will generate the folder path, folder name, and the type of event (added, renamed etc.) as well as when and who made the change.

7.5.7 User Category Management

This will provide a detailed report on the creation and management of categories.

7.5.8 Document Management

If you are interested in the history of a document, use this report. Select the time period to report on and then chose from the index which folder you are interested in. It will generate the document path, document name, and the type of event (added, renamed etc.) as well as when and who made the change.

7.5.9 Audit-level User Statistics

This will provide a report on site activity which can be generated according to a selected time frame.

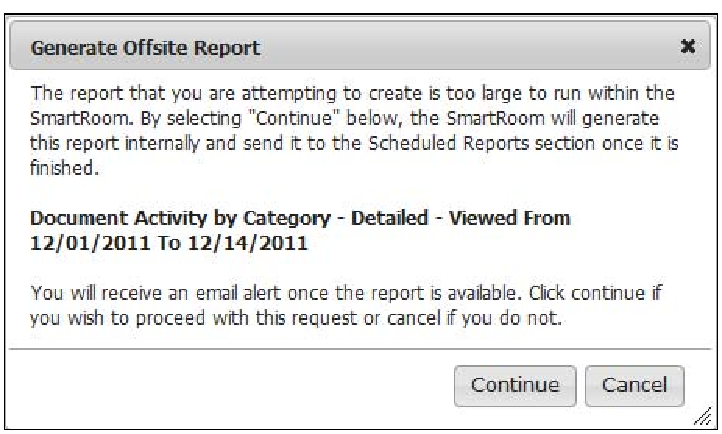
7.5.10 Instant Alert Management

This report will show all instant alerts that were previously sent. It will list the alert subject, its name, the folder or file it refers to and the time and date it was sent.

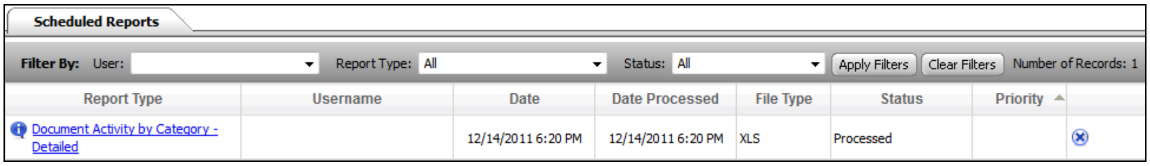
7.6 SCHEDULED REPORTS

In the event that a report is too large or complex to be created and exported directly from the SmartRoom the report can be sent to “Scheduled Reports”.

When a large report is requested, the SmartRoom will calculate the size and complexity of the report to determine if it will take significant amount of time and bandwidth to run and display. If the report reaches or surpasses certain benchmarks, the user will be prompted to send the report to “Scheduled Reports”.



Upon selecting “Continue” from the above prompt the user will be brought to the scheduled report section to see the status of the requested report.



Once the report has been generated and securely delivered to the SmartRoom, an email notification will be provided to the user stating that the report is now ready to be accessed. Clicking on the report title will prompt the user to export the report where it can be viewed without issue.

Users can retain these reports indefinitely or can delete them as necessary.

Only the user that created the scheduled report can access it. No other users will be aware that the report exists.

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 BEST PRACTICES

Link to the best practices guide.

8.4 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

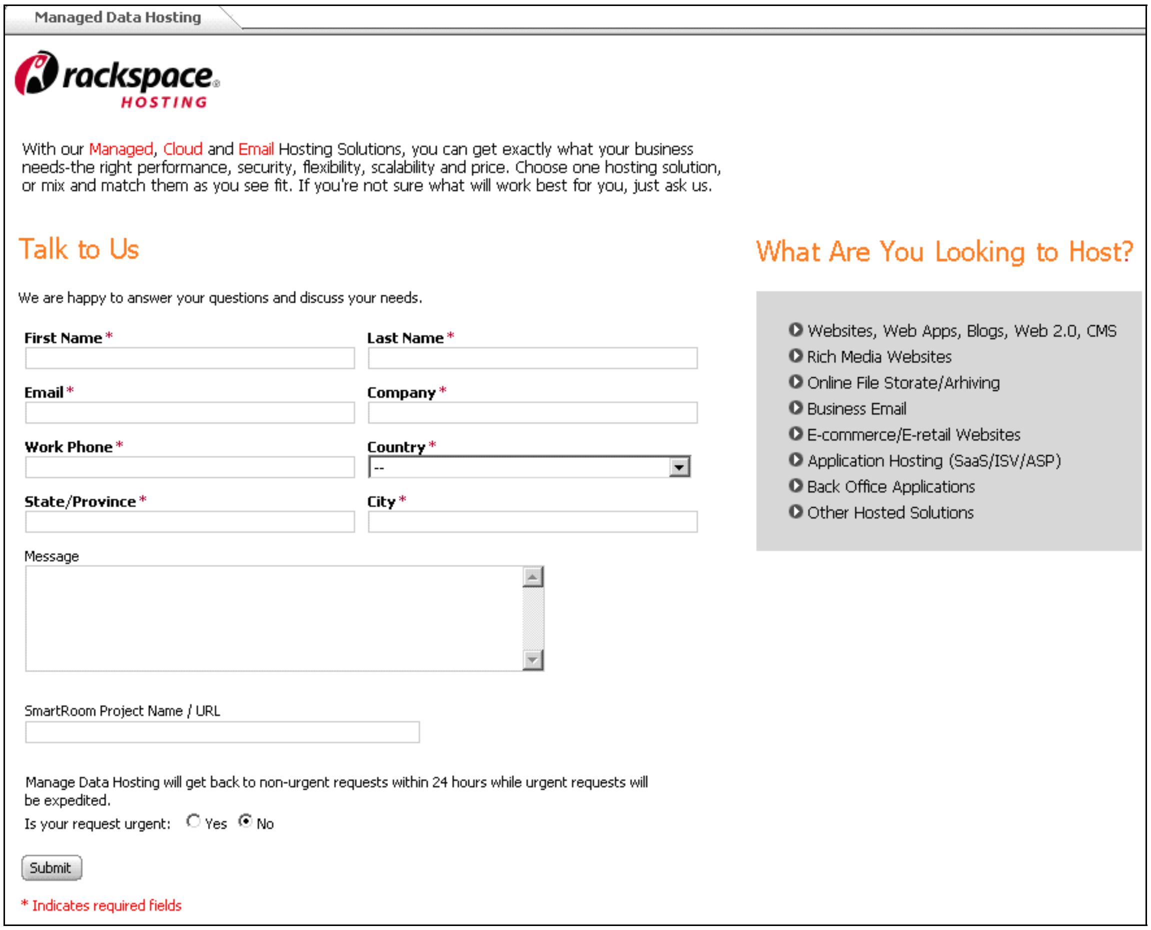
By Telephone:

Asia:	852.800.930.643
Brazil:	0900 722 0545
Europe:	00 800 3325 7666
Japan:	0120 974 858
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

rackspace HOSTING

With our Managed, Cloud and Email Hosting Solutions, you can get exactly what your business needs-the right performance, security, flexibility, scalability and price. Choose one hosting solution, or mix and match them as you see fit. If you're not sure what will work best for you, just ask us.

Talk to Us

We are happy to answer your questions and discuss your needs.

First Name *

Last Name *

Email *

Company *

Work Phone *

Country *

--

State/Province *

City *

Message

SmartRoom Project Name / URL

Manage Data Hosting will get back to non-urgent requests within 24 hours while urgent requests will be expedited.

Is your request urgent: Yes No

Submit

* Indicates required fields

What Are You Looking to Host?

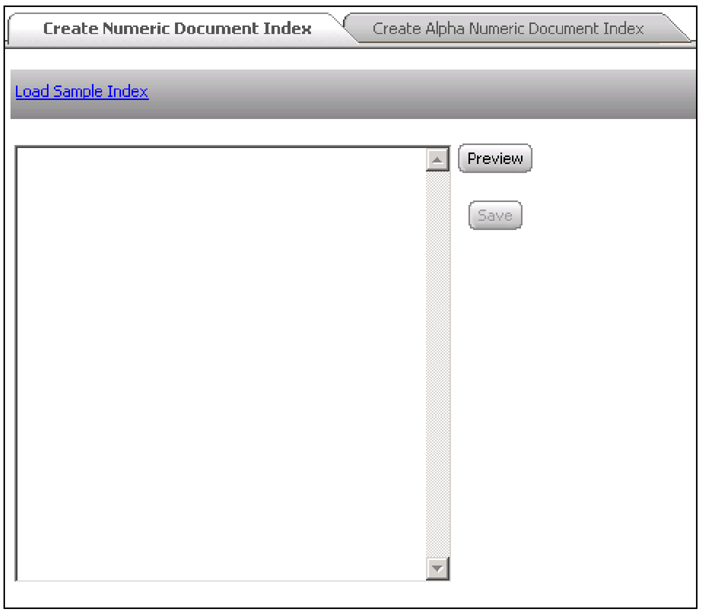
- Websites, Web Apps, Blogs, Web 2.0, CMS
- Rich Media Websites
- Online File Storate/Arhiving
- Business Email
- E-commerce/E-retail Websites
- Application Hosting (SaaS/ISV/ASP)
- Back Office Applications
- Other Hosted Solutions

10.0 SmartRoom Management

10.1 NEW INDEX

10.1.1 Create Numeric Document Index

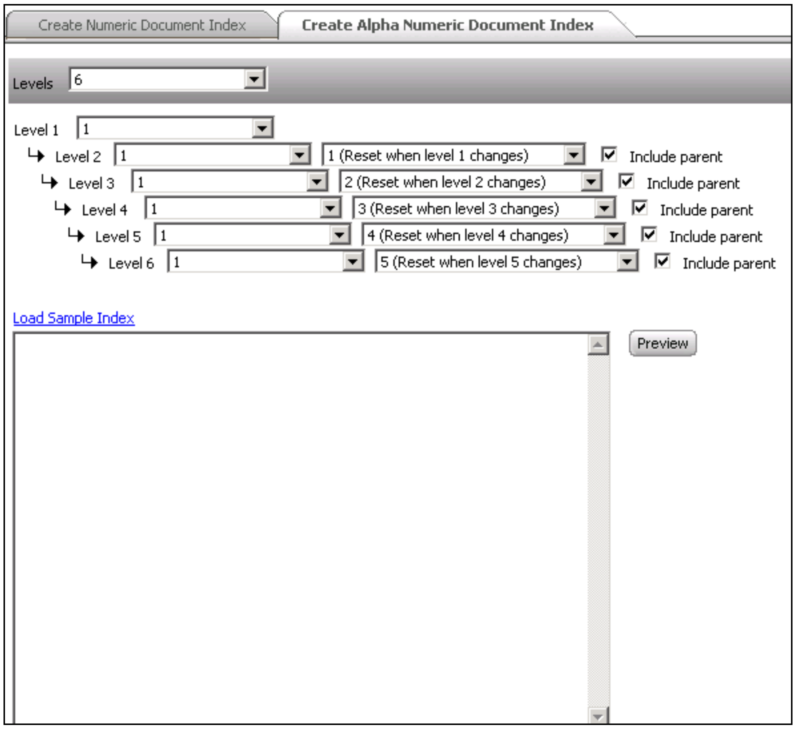
You have the ability to create a brand new index from within the site. Follow the on-screen instructions to learn how to copy and paste your index from Microsoft Word™ or Excel™ formats directly into the text box. You will see it rendered in dynamic HTML on the site and ready to use in seconds if it was formatted correctly. Click '**Load Sample Index**' for an example of ideal formatting.



Please be aware that when your index is up and running (with documents included), creating a new index will completely remove any existing index and all documents inside it. Therefore, it is a good idea to disable the index function once you are happy with your design to prevent any accidental deleting.

10.1.2 Create Alpha Numeric Document Index

An alpha numeric index can be created in the same way but we can change the style of the folder numbering.



To adjust the folder numbering between numeric and alphanumeric use the Levels tool that is shown above. The drop down box for each level will provide the available formatting options.

10.2 CONTENT

This will take you to the index with the Drag and Drop option enabled. Please reference section 4.0 Document Review and Index Maintenance of this document for further details.

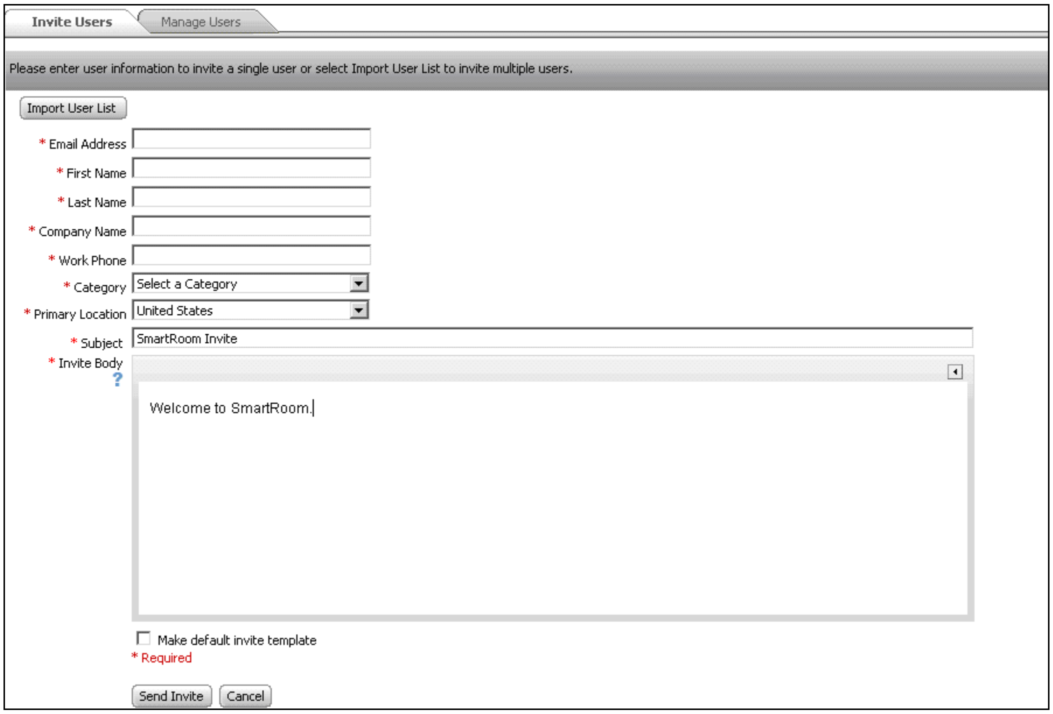
10.3 SECURITY PROFILES

This will allow you to adjust the specific rights of the users within the SmartRoom. Please see separate '**SUR Guide**' or reach out to your Project Manager for guidance.

10.4 ADD / EDIT USERS

10.4.1 Invite Users

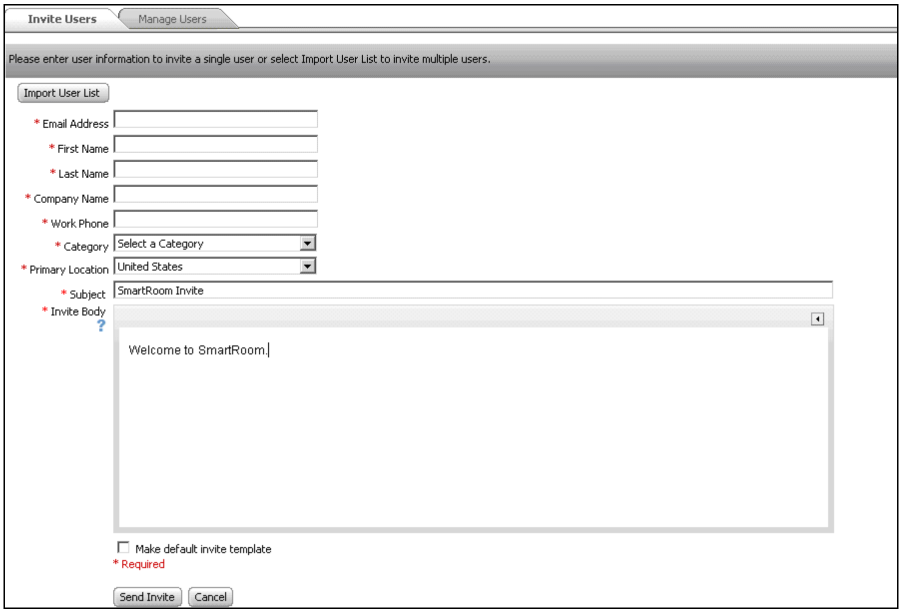
The **‘Invite Users’** tab allows you to invite new users individually or in bulk.



Populate all the fields as shown. The subject line and the body of the email invitation are retrieved from the general template that may have been created in your deal templates. You may edit the text as you wish for each invitation without affecting the stored template. The categories in the drop down menu have already been pre-created by your Project Manager, so please contact them if you wish to add another category.

You can also make permanent changes to the existing template by checking the “Make default invite template” box and then selecting “Send Invite”.

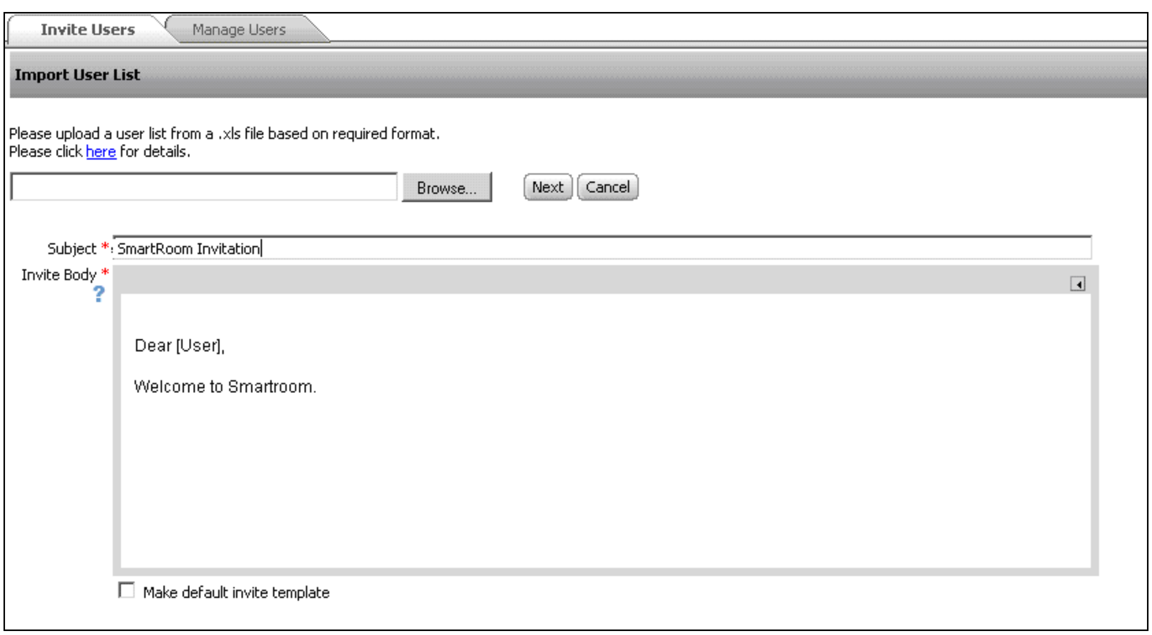
By inserting one of the prompts from the list that comes up when hovering over the blue ? at the top of the invitation text, the system will add the user's name according to the prompt saving you from having to personalize each invitation.



Click Send Invite to send the invitation once all details are filled in.

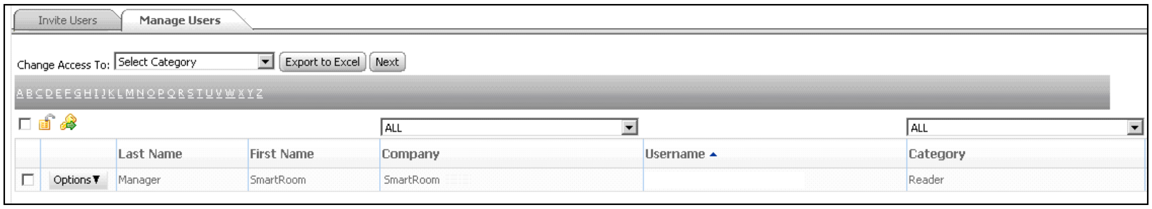
To invite multiple users click on the Import User List button.

Follow the onscreen instructions to upload your Microsoft Excel™ file (download the template if necessary.) User categories must be chosen from those that you have already established with your Project Manager.



10.4.2 Manage Users

The **'Manage Users'** tab will allow you to make several adjustment to existing members of the SmartRoom.

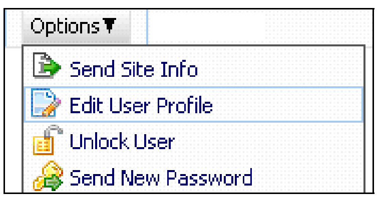


To change existing user's category:

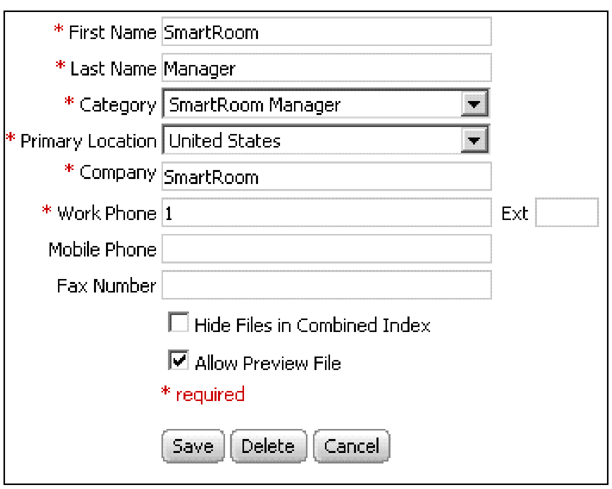
1. Check the box of the users whose category you wish to change. You can change more than one user in the same category.
2. Select the category. Please note, categories would have been pre-determined with your Project Manager.
3. Click on Next. It will ask you for confirmation, then click Save. The users you selected will be moved into their new category.

To delete users or amend their details:

Click on the options button and then select Edit User Profile.

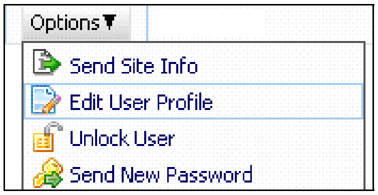


From here you can adjust or delete the profile as necessary.



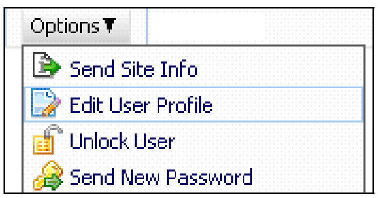
To send the users the site info:

Click on the options button and then select Send Site Info.



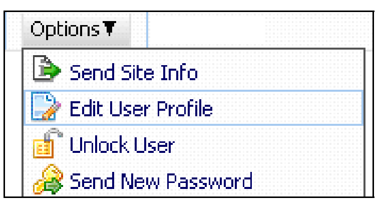
To unlock the users account:

Click on the options button and then select Unlock User. Please note that this can be done in bulk by selecting the checkbox next to the users name under the ‘Manage Users’ tab and then click the icon.



To send users a new password:

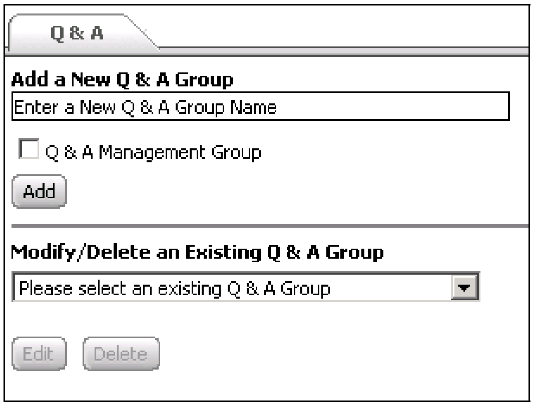
Click on the options button and then select Send New Password. Please note that this can be done in bulk by selecting the checkbox next to the users name under the ‘Manage Users’ tab and then click the icon.



10.5 Q & A (WHEN ENABLED)

We create and manage the Q&A groups and the '**Q&A Management Group**' in this section.

By checking '**Q&A Management Group**' prior to clicking Add, the group becomes the '**Q&A Management Group**'. Please note we can only have one '**Q&A Management Group**' per SmartRoom.



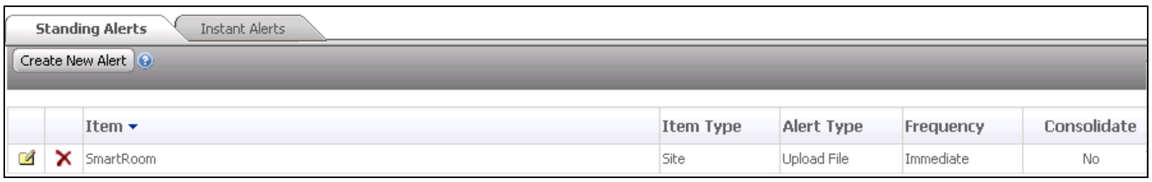
11.0 SmartRoom Settings

11.1 ALERTS

11.1.1 Standing Alerts

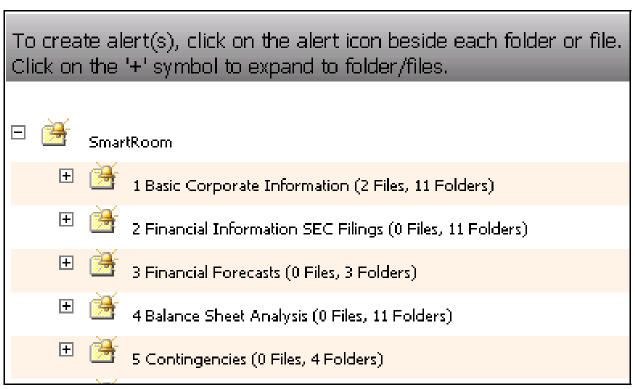
‘**Standing Alerts’** allow you to bring activity in the SmartRoom to the attention of all or selected users that have access to the information that has changed.

To create a new alert click on Create New Alert.



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**’



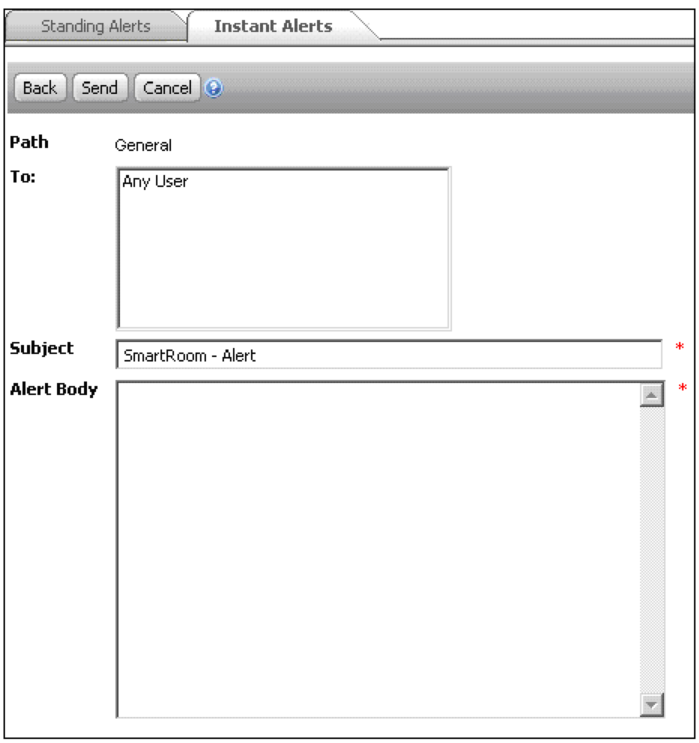
1. Select the type of alerts you wish to set up, ‘**Upload File**’, ‘**Delete**’, ‘**Read**’.
2. Select the frequency you wish to receive these alerts, ‘**Immediate**’, ‘**Hourly**’, ‘**Daily**’.
3. Check the ‘**Consolidate**’ box if you wish to receive the alerts in a single email.
4. Select or filter the necessary recipients by profile or user. If you wish for the alert to go to all users, check ‘**All Users**’.
5. Click on the icon to save/create the alert.
6. Click on the icon to cancel the alert.

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

11.1.2 Instant Alerts

'**Instant Alerts'** allow you the ability to send a one time, immediate alert to any specified number of recipients within the SmartRoom.

Select the user(s) you would like to send an alert to by checking the box next to their name or select all users by checking ☐ **Send This Message to All Users** .



Fill out the subject line and the alert body.

Click Send. The message will be instantly sent to the selected recipients.

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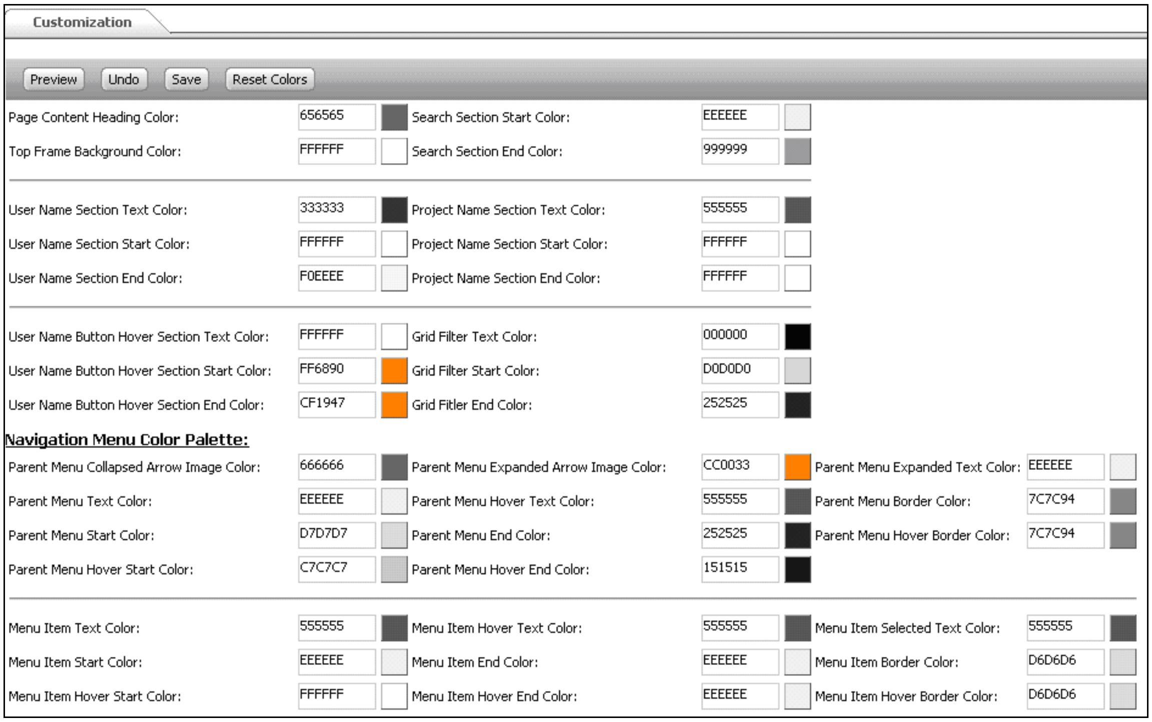
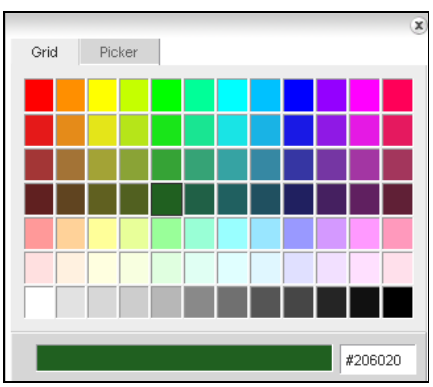
11.2 CUSTOMIZATION (WHEN ENABLED)

This section allows you to upload different logos and adjust the site colors. You will be able to preview the changes made before you save them to the SmartRoom.



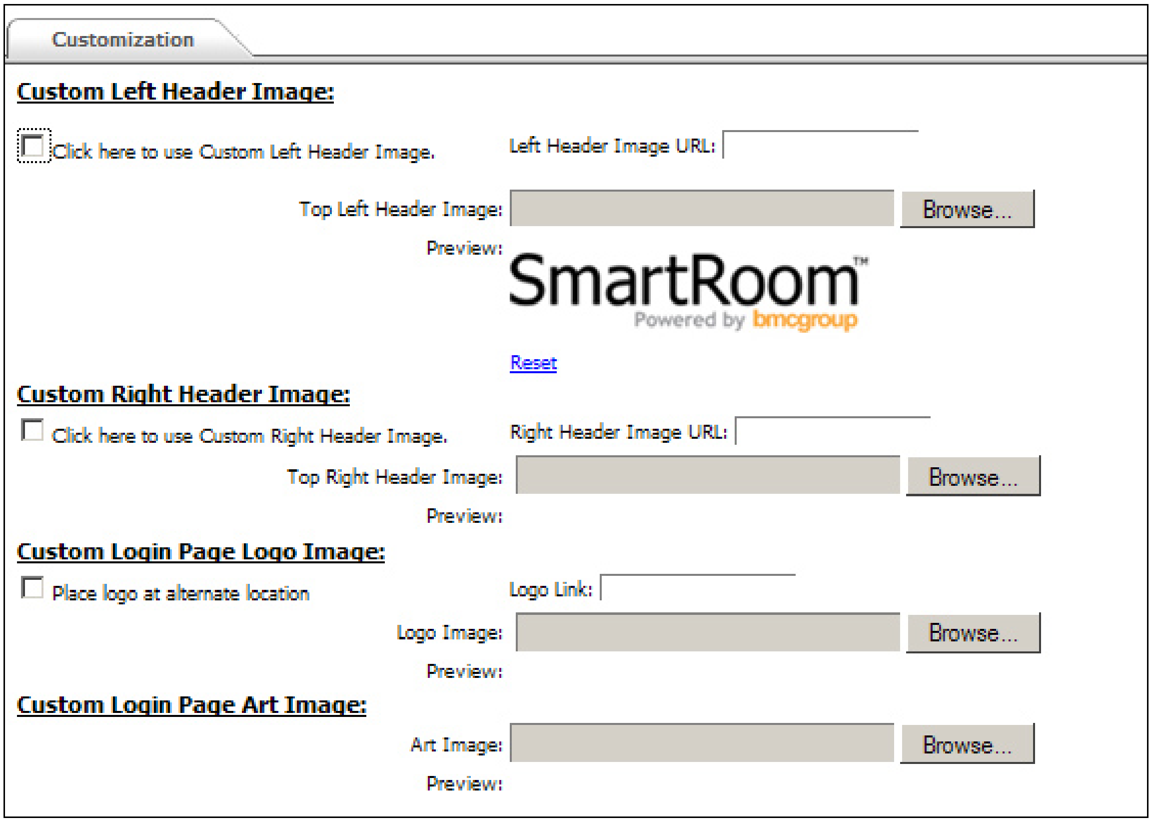
Colors

You can adjust colors by entering a different hex code or by clicking on the color sample and selecting your desired color from the color grid and picker.



Images

You upload images and replace what is currently on the site here. Please note, all images must be in JPG or GIF format and no larger than 400x60 pixels in size.

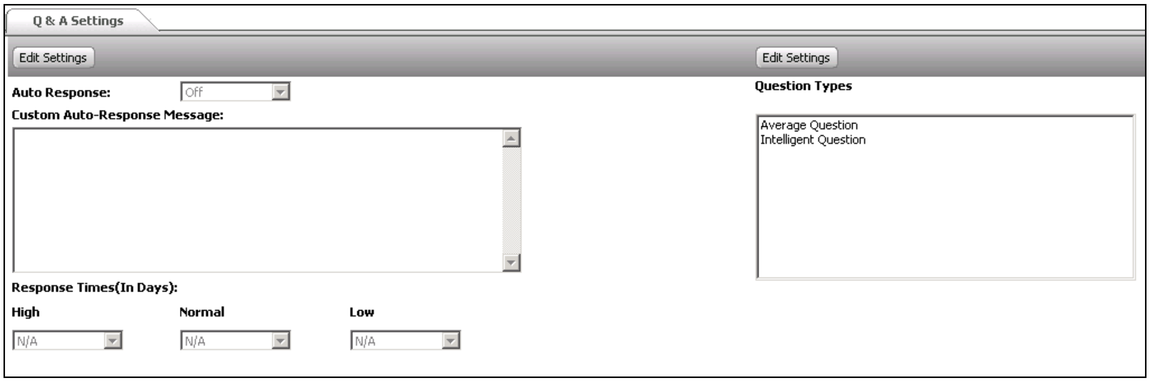


1. To upload images, select the **Logo**, **Header** or **Image** you wish to add or replace
2. Browse for your selected image
3. Click [Upload Image] located at the bottom of the page.
4. You must select the following in order to use a custom left header image:

   ☑ Click here to use Custom Left Header Image.
5. Click [Save] and then refresh the page in order to see the changes within the SmartRoom.

11.3 Q&A SETTINGS (WHEN ENABLED)

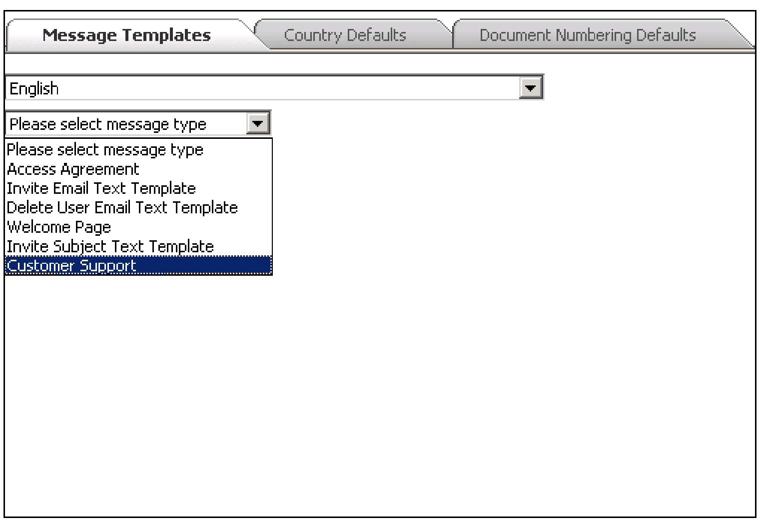
You can edit the Q&A settings and create the Q&A questions types in this section.



11.4 SITE DEFAULTS

11.4.1 Message Templates

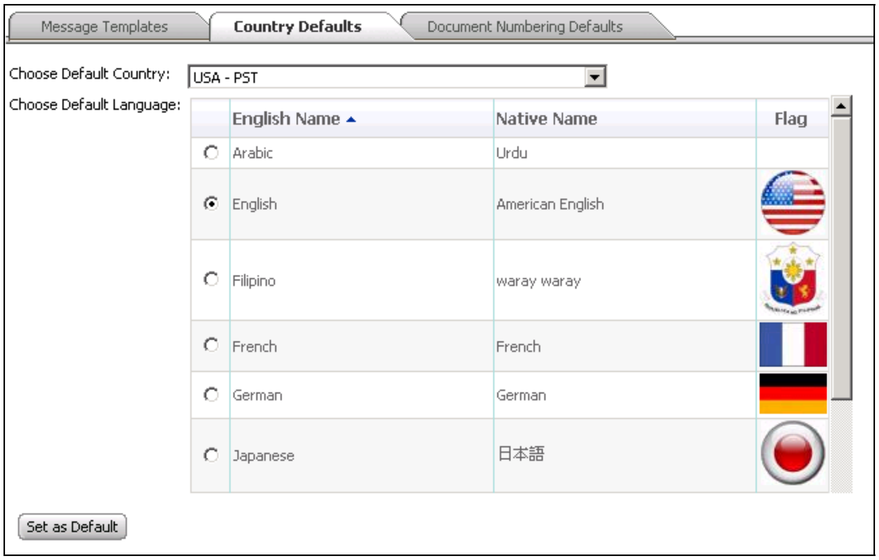
By clicking on '**Site Defaults**' you are able to change the access agreement, automated email correspondence and welcome page information. These can be amended for each language by cutting and pasting your selected text into the text box. Once saved, these templates are immediately updated and made available (in real-time) within the SmartRoom.



11.4.2 Country Defaults

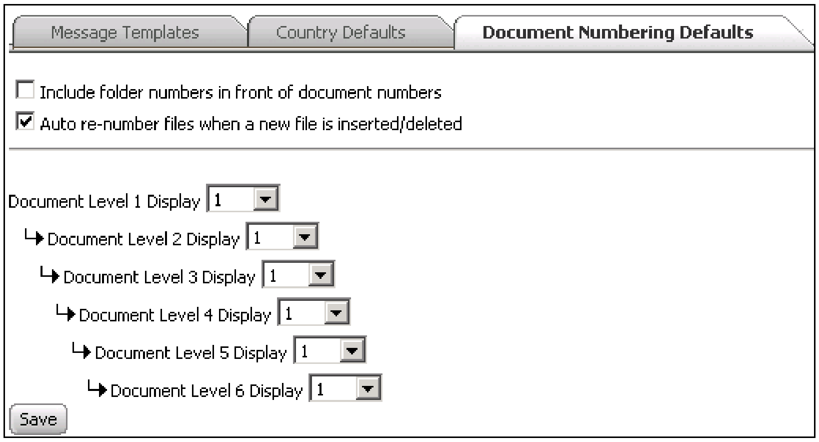
You are able to select the default country for the site here. This will determine the date, time format and time zone. You may also select the default language for the site.

Click Set as Default to save your changes.

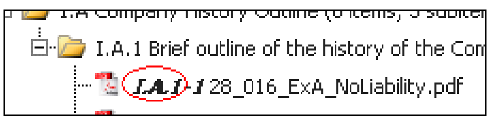

Message Templates
Country Defaults
Document Numbering Defaults
Choose Default Country:
USA - PST
Choose Default Language:
English Name
Native Name
Flag
Arabic
Urdu
English
American English
Filipino
waray waray
French
French
German
German
Japanese
日本語
Set as Default

11.4.3 Document Numbering Defaults

‘Document Numbering Defaults’ enables us to adjust the default settings for document numbering.

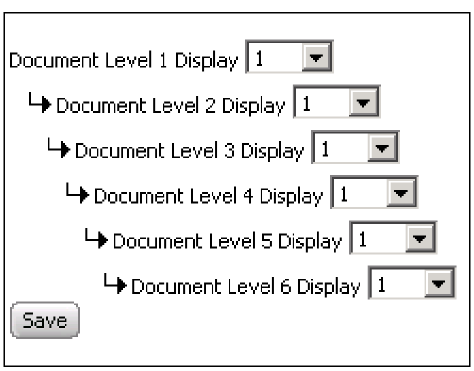


‘**Include folder numbers in front of document number**’ - If this box is checked, the document’s folder number will be evident before each documents name.



‘**Auto re-number files when a new file is inserted/deleted**.’ When checked, the files will re-number themselves in their folder if a document is deleted or added. If this box is not checked and files are added, the new document will acquire an extra digit to its document number.

‘**The document level display**’ allows us to alter the style of the document numbering. You can make separate changes for each folder level and its number. These changes will be reflected in all document names.



Choose from the drop down boxes for each level and then click 

. These changes can be made at any time.