QUICK REFERENCE GUIDE:

USERS

SmartRoom™

GETTING STARTED

To login, you will need:

- An Internet Connection

- An Active SmartRoom Subscription

- A valid login to SmartRoom

VIEW ALL CONTENT

1 | Once you have logged in and selected a room, select "Content" from the left menu bar

2 | The SmartRoom Index is displayed in the main content area on the right

MANAGE CONTENT

Depending on your access, several actions are available on selected content. The actions are:

Download Original File – Downloads the file to the local device based on browser settings

Refresh Folder - Gets latest available content

Properties - View detailed info about the content

Collapse - Closes all subfolders in selected folder

View Files - Displays a list of files in a separate window, for multi-tasking and moving content.

Folder Structure - Displays folder structure and content in a separate window

Search This Folder - Searches for matching words or terms in the selected folder or file

View File Versions - Displays a list of all versions of a document which can be viewed or removed

Mark as Unread - Changes the document back to bold format to indicate it has not been read

Export Index - This feature will export the index structure to excel with key information: Name (of Content), Date Created, Size (KB), Page Count

CUSTOMIZE YOUR USER PROFILE 👤

On the upper right hand corner menu, select your user name. These features are:

- **Split View** – Splits the content view, providing a separate window to manage/move file content

- **Enable Drag** – Allows the ability to drag and drop content via the main content view or split view

- **User Profile** – View or update the following:

  - **User Details** – Name, Company, Profile

  - **Password Update** – Change your password

  - **Authentication** – Set up 2 factor

  - **My Settings** – Set Menu Style, Language, Auto-Snap Windows, and Show Numbers in Saved Folders/Files

SAVE QUEUE 💾

1 | From the left menu bar, select "Content" Hover over folder or file menu and select action > Add to Save Queue

2 | Once content is added, select "Save Queue" from the left menu to further select only the files you want to save or select "Finalize All." This is the content that becomes available for a bulk download to local computer as zip file. Available downloads are then displayed in the 2nd tab. You will also receive an email once the zip has been processed.

PRINT QUEUE 🖨

1 | From the left menu bar, select "Content" Hover over folder or file menu and select action > Save to Print Queue

2 | Once content is added, select "Print Queue" on the left menu to check the status or pause the print job. Note – Bulk printing via the Print Queue require a separate executable (SmartPrint.exe) to be installed.

DASHBOARD (SUMMARY) 📊

1 | From the left menu bar, select "Dashboard"

- This view allows you to easily access the most recent uploads or document views.

- Use filters on any view to change the date range or drill into detailed reports.

ALERTS ⚠

From the left menu bar, select "Alerts"

- Here you can view or delete existing alerts, or click "Create Personal Alert" to set up a new one.

- Personal alerts allow users to receive email alerts on specific events. Such events are: new documents are uploaded, documents are deleted, folders/documents are viewed, or new versions of files are added.

CONTACT US ✉

Need Help? Please contact us.

Within SmartRoom: From left menu, select "Contact SmartRoom"

Email: SmartRoomSupport@smartroom.com

Call:

North America: +1.877.332.5739

Asia: +852.800.930.643

Europe: 00.800.3325.7666

Japan: 0120.974.858

India: 000.800.100.8914

SmartRoom™
smartroom.com