SmartRoom™
Powered by bmcgroup

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]

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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.

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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.
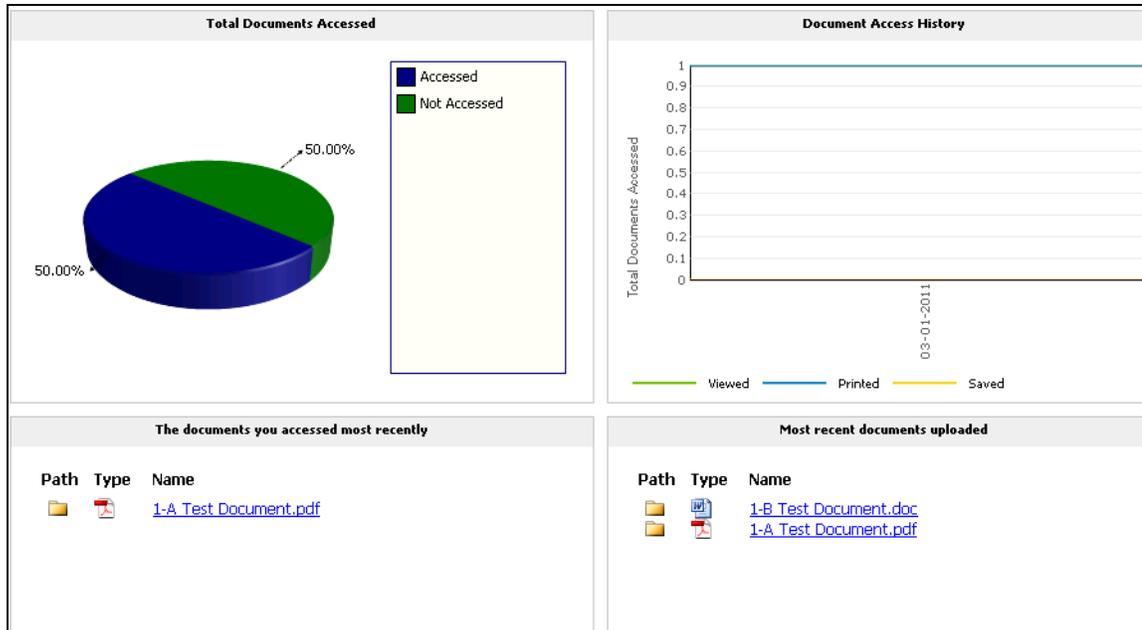
# 5.0 Document Review and Index Maintenance

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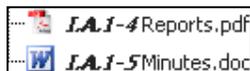
Clicking on the document name will open the document in a separate window.

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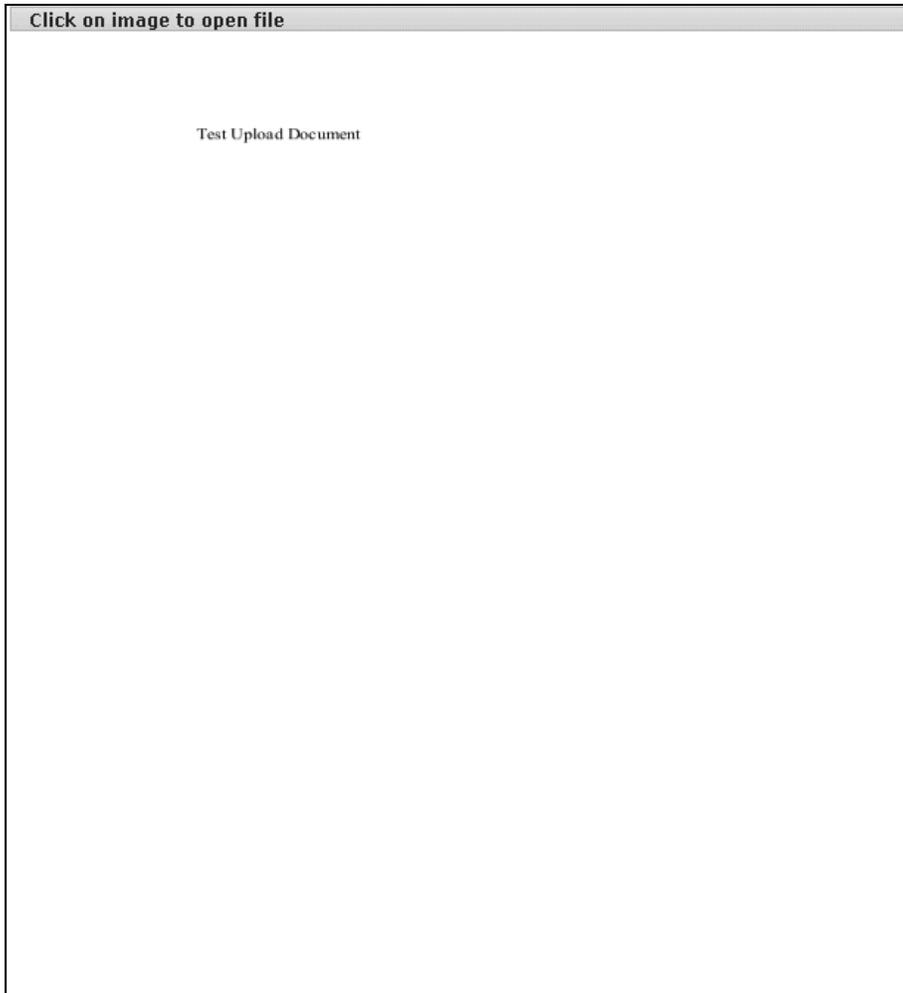
To ensure you can access this feature, if enabled, please check the box '**Allow Preview File**' under **My SmartRoom>Account>Options** tab.

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**.

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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

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.


	Name	Size	Uploaded	Last Viewed
	I-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.
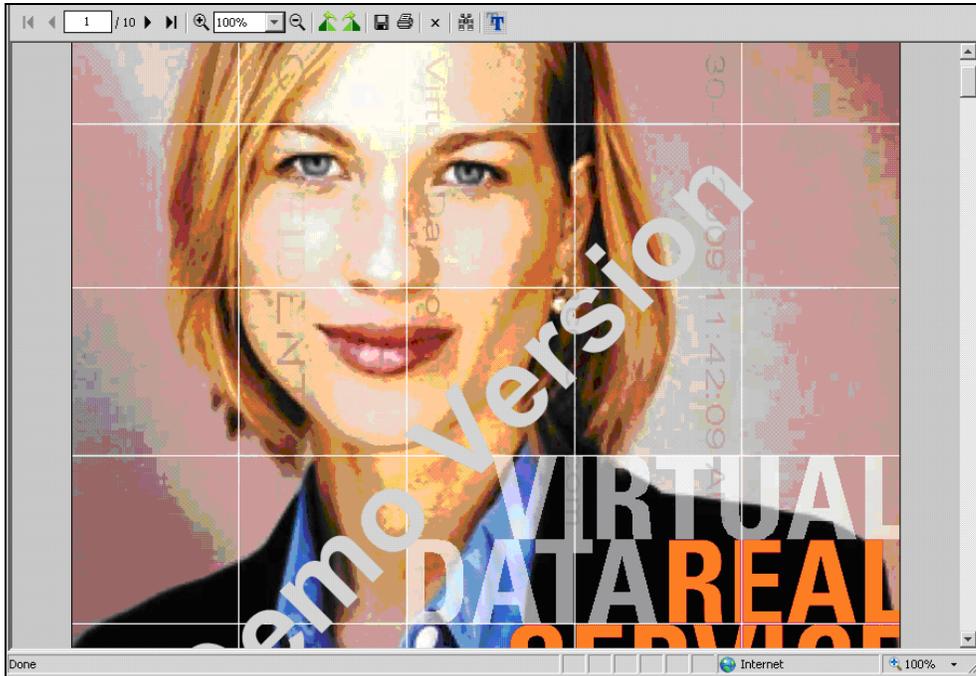
Document Viewer Controls:

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

(Where necessary if viewing non-English documents)

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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.


Clicking on the [Options ▼] 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^{TM} 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 –

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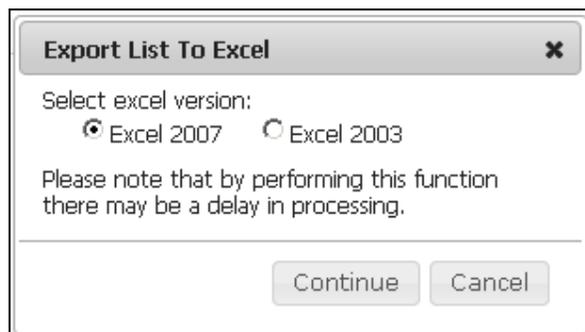
5.4 SEARCH

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.
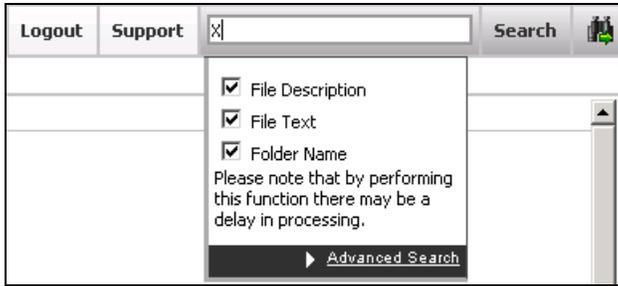
5.4.1 ADVANCED SEARCH

In addition to the standard search, users have the ability to complete an advanced search by 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.
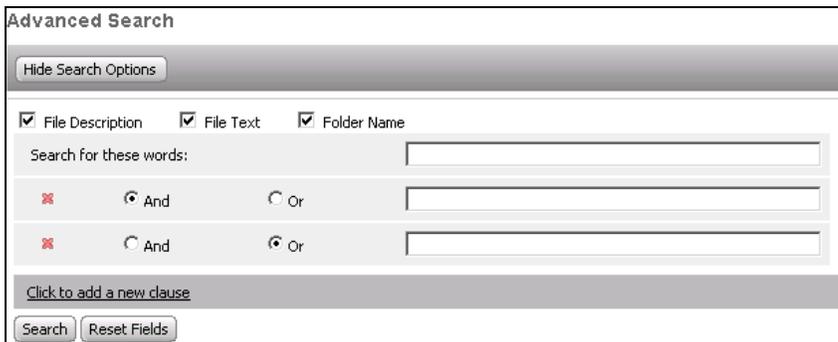
5.5 PRINT QUEUE

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

Print Queue

Page: 1 of 1 1

Filter by status: All   Test Printer   Pause Printing   Cancel All   Records Per Page 100   Total Number of Documents:5

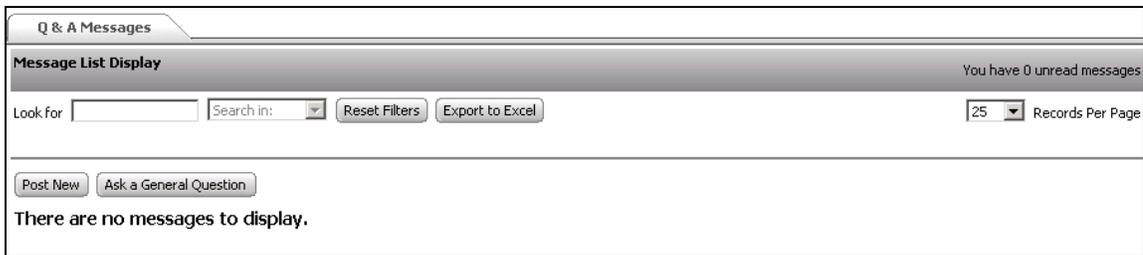SmartRoom℠
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5.6 SAVE QUEUE

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^{TM} document.
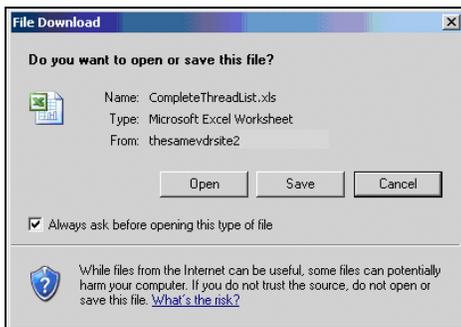
We can send a general question or response to selected members of the SmartRoom by checking the box alongside their name or to all users by checking .

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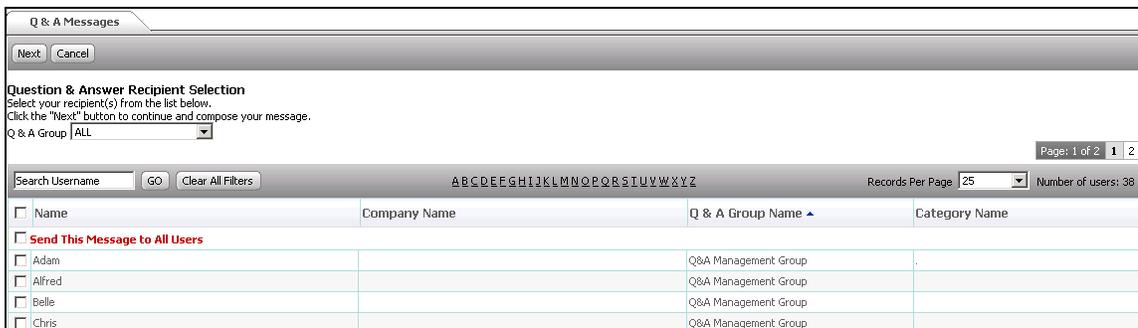
6.0 My SmartRoom

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 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.
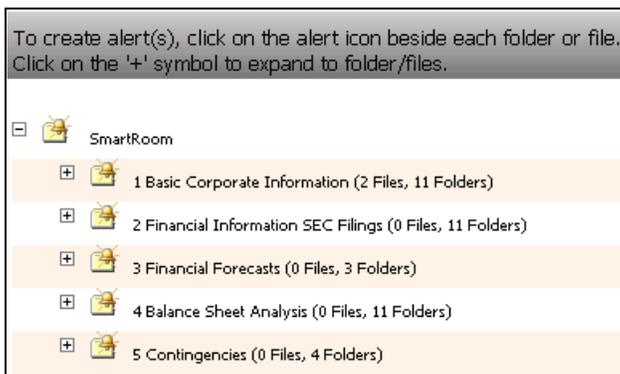
6.2 ALERTS

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 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**'

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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.

	Item	Item Type	Alert Type	Frequency	Consolidate	Alert ▲
🖊 ✖	UAT Test Folder 3	Folder	Upload File	Daily	Yes	Personal

Personal Alerts | Manage Q & A Alerts

Turn my Alerts Off

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 | **Manage 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.

List 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

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7.0 Reports

7.1 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.

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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

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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.