



# SMART Vantage™

**Configuration and user's guide**

Extraordinary made simple® | **SMART.**

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Patents pending.

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# Chapter 1

## Getting started

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## Overview

SMART Vantage™ technology-management software is an application that enables you to understand and manage how your SMART Board® interactive whiteboards and projectors are being

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used. Once SMART Vantage software is installed and configured in your school or institution, you can log onto an Internet-based user interface and see the location of your interactive whiteboards and projectors and whether they're currently in use. You can also generate reports about how your interactive whiteboards are being used and how much time remains before your projector bulbs need to be replaced.

An Enterprise level implementation of SMART Vantage software enables you to generate reports about interactive whiteboard usage and projector bulb life expectancy from multiple institutions that have implemented SMART Vantage software.

#### NOTE

For more information on how to use the information in reports to maximize effectiveness in the classroom, to reduce maintenance and support costs for your interactive whiteboards and projectors and to evaluate your return on investment, see *Generating SMART Vantage reports* on page 15 and *Generating SMART Vantage Enterprise reports* on page 31.

All features of SMART Vantage software and SMART Vantage Enterprise software are available to administrators, who also have access to features that enable them to configure and manage an Institution or Enterprise level software implementation.

#### TIP

For more information on installing SMART Vantage software at an Institution or Enterprise level, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).

## SMART Vantage software

In a typical Institution level installation, SMART Vantage software is installed on a server that has network connectivity to your institution's interactive whiteboards and projectors.

Once installed and configured, SMART Vantage begins collecting usage from your interactive whiteboards and projectors. To view usage data, log onto an Internet-based user interface and generate usage reports. For more information on generating Institution level reports, see *Generating SMART Vantage reports* on page 15.

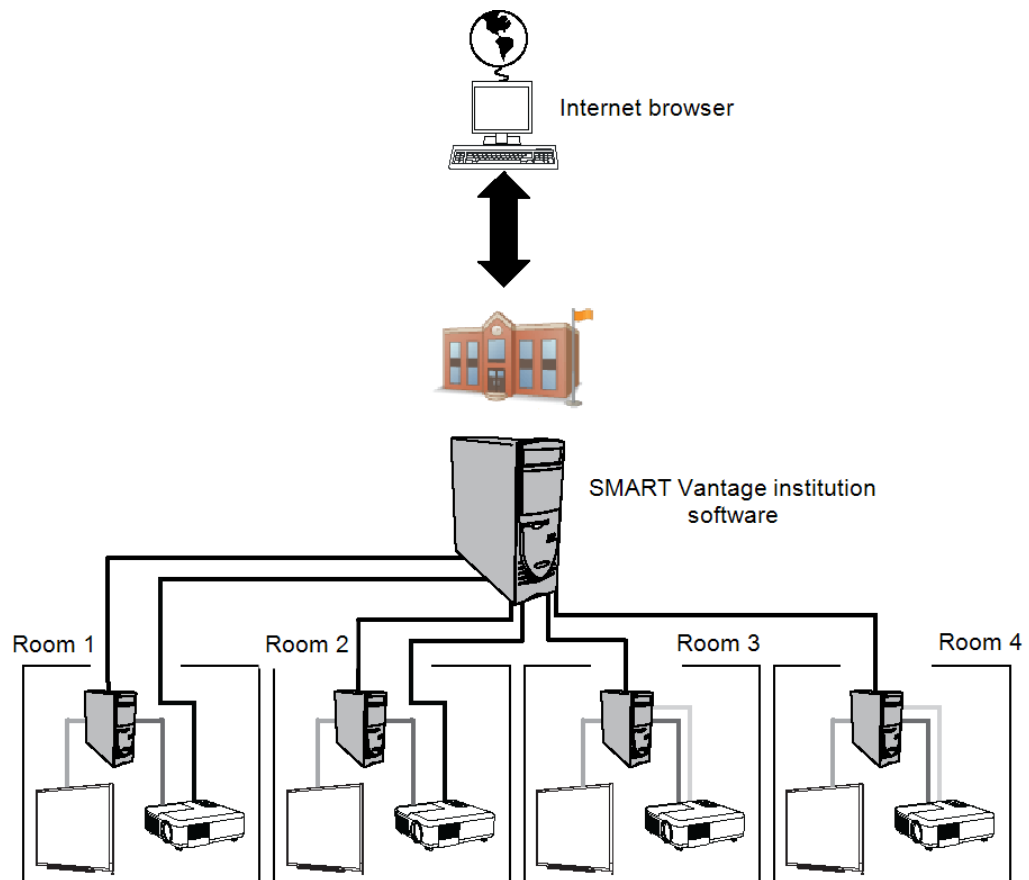
Additional functionality is available to administrators who configure and manage an Institution level implementation of SMART Vantage software. For more information, see *Configuring and managing a SMART Vantage Institution software implementation* on page 48.

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#### **i** NOTES

- The features of SMART Vantage software available to a user depend on the user's assigned role. For more information, see *About roles and permissions* on page 7.
- Institution level report users and administrators can generate reports and manage interactive whiteboard and projector usage only within their institution's implementation of SMART Vantage software.




#### Features and highlights

Feature	Description
Create an inventory of your interactive whiteboards and projectors.	Add individual interactive whiteboards and projectors to the inventory list, or add multiple interactive whiteboards and projectors by importing a comma-separated values (CSV) file containing their information.

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Feature	Description
Create groups of interactive whiteboards and projectors.	Create groups of interactive whiteboards and projectors to sort and efficiently compare interactive whiteboard usage data and projector bulb life status.
Determine the status of interactive whiteboard systems you add to your inventory.	Identify the locations of your interactive whiteboards and projectors, and determine whether they're connected, disconnected or not responding SMART Vantage software.
Manually control the power status of your projectors.	Use controls in the Internet-based user interface to manually turn on your projectors or to place them in Standby mode.
Apply a power management schedule to your projectors.	Create and apply a power schedule that automatically places projectors in Standby mode at a set time.
	 <b>TIP</b> The schedule you create also determines the time frame used to capture interactive whiteboard usage data for reports.
Determine a projector's power status and whether it's on the power management schedule.	SMART Vantage software enables you to see whether projectors in your inventory are currently on.
Configure caution and warning thresholds for the projector bulbs in your inventory.	Assign values to caution and warning thresholds that identify when projector bulbs are reaching the end of their life expectancy.
Automatically issue projector bulb life warnings.	Proactively manage projector bulb life by enabling automatic e-mail notifications that alert you when a projector's bulb is approaching the end of its life and will need to be replaced.
Generate projector bulb status reports.	Generate reports showing the current status of the bulbs in the projectors listed in your SMART Vantage inventory. These reports provide information on how many hours a projector bulb has been used for and how close the bulb is getting to the end of its predicted life. Information in a report enables you to determine which bulbs need to be replaced before a bulb actually fails which greatly reduces the chance that a bulb will fail and interrupt your interactive whiteboard usage.
Generate interactive whiteboard usage reports.	Generate reports showing how many touches per hour your interactive whiteboards register and which software applications are used the most with interactive whiteboards. You can also generate reports that compare usage data from multiple interactive whiteboard systems in your institution.



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## SMART Vantage Enterprise software

In a typical Enterprise level installation, SMART Vantage Enterprise software is installed on a server that has network connectivity to a district or enterprise's Institution level servers, which host SMART Vantage software and collect interactive whiteboard and projector usage information.

Log onto an Internet-based user interface to generate reports that provide details of each institution's combined interactive whiteboard or projector usage. For more information on generating reports, see *Generating SMART Vantage Enterprise reports* on page 31.

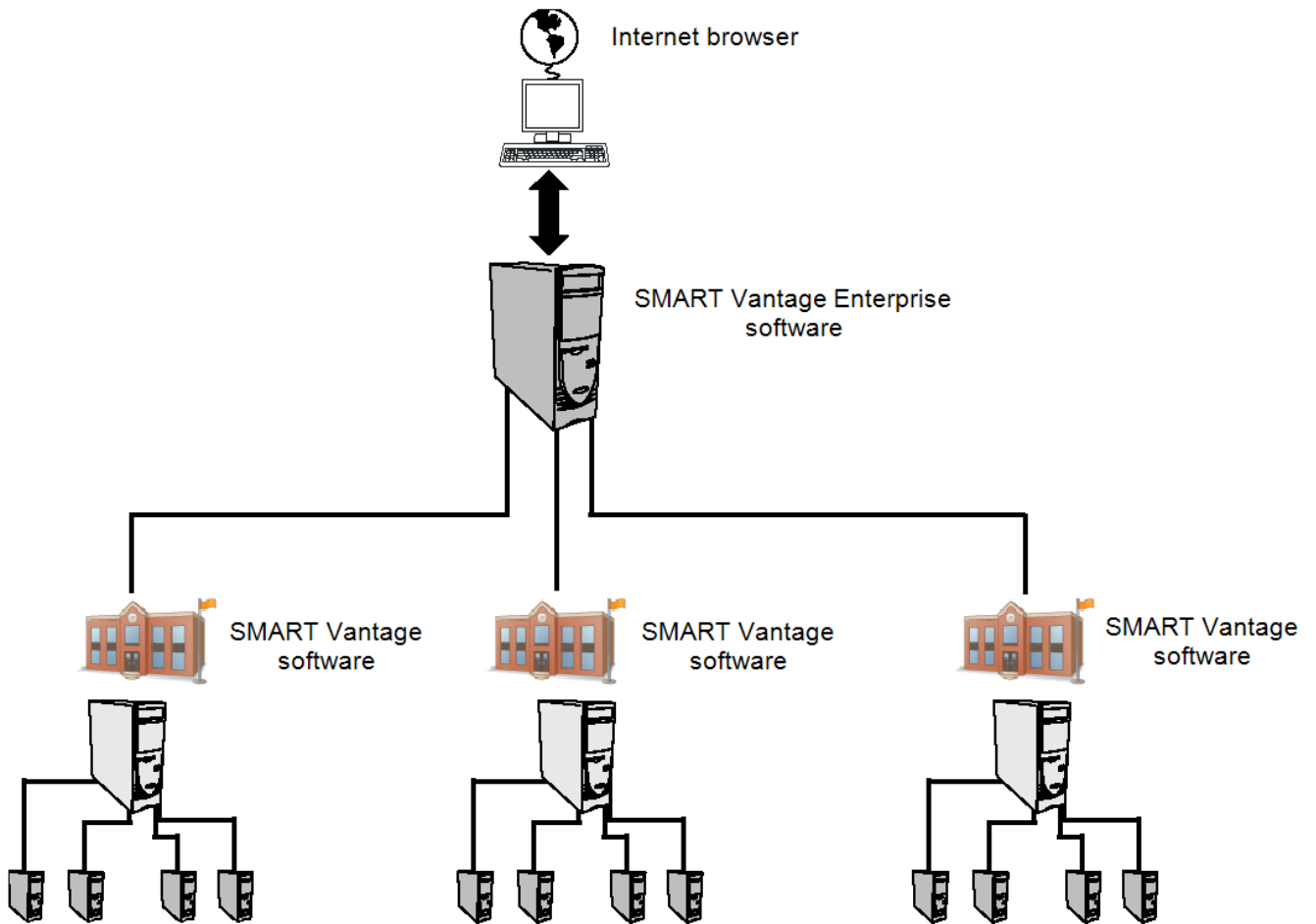
Additional functionality is available to administrators who configure and manage an Enterprise level implementation of SMART Vantage Enterprise software. For more information, see *Configuring and managing a SMART Vantage Enterprise software implementation* on page 68.

### **i** NOTES

- The features of SMART Vantage software available to a user depend on the user's assigned role. For more information, see *About roles and permissions* on page 7.
- Enterprise level report users can generate reports and manage interactive whiteboard and projector usage in an Enterprise and Institution level implementation of SMART Vantage software.

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### Features and highlights

Feature	Description
Create an inventory of institutions that have implemented SMART Vantage software across your enterprise.	Individually add institutions to the SMART Vantage Enterprise inventory list, or add multiple institutions by importing a CSV file containing their information. Once an institution is added to your inventory list, you can connect to that institution's hosting of SMART Vantage software.
Group institutions.	Create groups of institutions to enable you to sort and efficiently compare SMART Board interactive whiteboards usage data and projector bulb life status between different institutions in your inventory list.

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Feature	Description
Quickly determine the connection status of an institution's hosting of SMART Vantage software.	Identify the name and IP address of institutions in your inventory list and see whether an institution's hosting of SMART Vantage software is connected or disconnected to SMART Vantage Enterprise software.
Create a default filter schedule for data in reports.	Create a schedule for filtering the usage data from institutions in your inventory list.
Generate interactive whiteboard usage reports for the institutions in your inventory list.	Generate reports that show either combined or compared interactive whiteboard usage data from institutions in your inventory list. You can also generate reports that provide bulb life status information from projectors in the institutions in your inventory.

## About roles and permissions

All aspects of SMART Vantage and SMART Vantage Enterprise software require that you log on as a report user or administrator. Each role has its own set of access permissions to the functionality of SMART Vantage software.

### **i** NOTES

- The user name and password assigned to you determine whether you have report user or administrator access permissions.
- Your LDAP server authenticates and authorizes all SMART Vantage and SMART Vantage Enterprise users. Consult your network administrator for more information on obtaining a user name and password.

The following four roles are available:

- SMART Vantage report user
- SMART Vantage Enterprise report user
- SMART Vantage administrator
- SMART Vantage Enterprise administrator

### SMART Vantage report user

SMART Vantage report users can generate reports providing a summary of interactive whiteboard usage and projector bulb life status data from within their institution's implementation of SMART Vantage software.

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## SMART Vantage Enterprise report user

A SMART Vantage Enterprise report user can generate reports providing a summary of interactive whiteboard usage and projector bulb life status data from multiple institutions that have implemented SMART Vantage software.

## SMART Vantage administrator

A SMART Vantage administrator can:

- Generate reports providing interactive whiteboard usage and projector bulb life status data from their institution's implementation of SMART Vantage software.
- Configure their institution's implementation of SMART Vantage software.

## SMART Vantage Enterprise administrator

A SMART Vantage Enterprise administrator can:

- Generate reports providing a summary of interactive whiteboard usage and projector bulb life expectancy data from multiple institutions that have implemented SMART Vantage software.
- Configure and manage an Enterprise level implementation of SMART Vantage Enterprise software.

### **i** NOTE

SMART Vantage Enterprise administrators also have SMART Vantage administrator access rights and can log onto an individual institution's implementation of SMART Vantage software.

## Logging onto the user interface

To log onto the user interface, you must know the following:

- The IP address of the server hosting SMART Vantage or SMART Vantage Enterprise software
- Your user name and password

### **■** To log onto the SMART Vantage user interface

1. Type the IP address of the server hosting SMART Vantage software in your Internet browser's address bar, and then press ENTER.

The SMART Vantage sign-in screen appears.

2. Type your user name and password in the appropriate boxes.

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3. Click **Sign In**.

The SMART Vantage home page appears.

#### ■ To log onto the SMART Vantage Enterprise user interface

1. Type the IP address of the server hosting SMART Vantage Enterprise software in your Internet browser's address field, and then press ENTER.

The SMART Vantage Enterprise sign-in screen appears.

2. Type your user name and password in the appropriate boxes.
3. Click **Sign In**.

The SMART Vantage Enterprise home page appears.

## Navigating the report user interface

The following section provides information on navigating the report user interface of SMART Vantage and SMART Vantage Enterprise software implementations, as well as the features available in the user interfaces.

### SMART Vantage software

This section provides information on the features available to a SMART Vantage report level user.

Two screens are available in the user interface:

- System Manager
- Reports

#### System Manager

In the System Manager screen, you can do the following:

- View a list of all the interactive whiteboards and projectors that your installation of SMART Vantage Institution software is managing.
- View information about each interactive whiteboard and projector in your inventory, including name, operating status and location.
- Export a CSV file containing details of each inventory item.

#### Reports

In the Reports screen, you can generate reports providing interactive whiteboard usage and bulb life status data from your inventory. For more information, see *Generating SMART Vantage reports* on page 15.

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### SMART Vantage Enterprise software

This section provides information on the features available to a SMART Vantage Enterprise report level user.

Two screens are available in the user interface:

- Institution Manager
- Reports

#### Institution Manager

In the Institution Manager screen, you can do the following:

- View a list of the institutions in your inventory.
- View information on each institution's inventory, including name, connection status, IP address and port number.
- Export a CSV file containing details of each inventory item.

#### Reports

In the Reports screen, you can generate reports providing interactive whiteboard usage information and bulb life status data from the institutions listed in your inventory. For more information, see *Generating SMART Vantage Enterprise reports* on page 31.

## Navigating the administrator interface

The following section provides information on navigating the administrator interface of SMART Vantage and SMART Vantage Enterprise software implementations, as well as the features available in the user interfaces.

### SMART Vantage software

This section provides information on the features available to a SMART Vantage administrator.

Three screens are available in the user interface:

- System Manager
- Reports
- Settings

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#### System Manager

The System Manager screen includes three tabs that enable you to manage your inventory of interactive whiteboards and projectors:

- Manage Inventory
- Control Systems
- Manage Groups

Each tab provides the following information and functionality:

Tab	Information and functionality
Manage Inventory	<p>View a list of all interactive whiteboards and projectors managed by your institution's implementation of SMART Vantage software.</p> <hr/> <p>View information about each interactive whiteboard and projector in your inventory, including name, operating status and location.</p> <hr/> <p>Add interactive whiteboards and projectors to your inventory:</p> <ul style="list-style-type: none"><li>• Manually add an interactive whiteboard or projector, its IP address and location.</li><li>• Import a CSV file that lists all the interactive whiteboards and projectors that you want to add to your inventory.</li><li>• Enable SMART Vantage software's autodiscovery feature to automatically detect and add previously listed interactive whiteboards and projectors.</li></ul> <hr/> <p>Edit or delete information about an interactive whiteboard or projector.</p>
Control Systems	<p>Select a projector from your inventory and manually turn it on or place it in Standby mode. You can also select multiple projectors or a group of projectors and simultaneously control the power status of each projector.</p> <hr/> <p>Add a projector (or group of projectors) to a power management schedule to automatically place projectors in Standby mode according to the schedule you create. For more information see <i>Customizing the power management and reporting schedule</i> on page 60.</p>
Managing Groups	<p>Create groups of interactive whiteboards and projectors, enabling you to easily select devices for managing and generating usage reports.</p>

#### Reports

In the Reports screen, you can generate reports providing interactive whiteboard usage and bulb life status data from your inventory. For more information, see *Generating SMART Vantage reports* on page 15.

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#### Settings

The Settings screen includes two tabs that enable you to configure your institutions's implementation of SMART Vantage software:

- Customize
- Notifications

Each tab provides the following information and functionality:

Tab	Information and functionality
Customize	Set the name of your institution in SMART Vantage software. This name appears in usage reports.
	Customize a schedule to determine when projectors in your inventory are placed in Standby mode. The schedule also filters usage data that appears in reports.
	Use the autodiscovery feature to enable SMART Vantage software to recognize and connect to interactive whiteboards and projectors if the computer they use to connect to the network changes.
	Assign a projector password to enable SMART Vantage software to retrieve bulb life status information and to apply a projector power management schedule to your institution's projectors that require a password.
Notifications	Enable e-mail notifications that provide warning information on projector bulb life status.
	Customize the default projector bulb life status values used to determine warning thresholds.

### SMART Vantage Enterprise software

This section provides information on the features available to a SMART Vantage Enterprise software administrator.

Three screens are available in the user interface:

- Institution Manager
- Reports
- Settings

#### Institution Manager

The Institution Manager screen includes the *Manage Institutions* tab which enables you to manage your inventory of institutions that have implemented SMART Vantage software.



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The *Manage Institutions* tab enables you to do the following:

- View a list of all institutions that your installation of SMART Vantage Enterprise software is able to receive usage data from.
- View and edit each inventory item's information including name, connection status, IP address and port number.
- Manually add an institution using the IP address of the server hosting an institution's implementation of SMART Vantage software.
- Import a CSV file containing a list all of the institutions that have implemented SMART Vantage software.
- Delete institutions from your inventory.

### Reports

In the Reports screen, you can generate reports providing interactive whiteboard usage and bulb life status data from the institutions in your inventory. For more information, see *Generating SMART Vantage Enterprise reports* on page 31.

### Settings

In the Settings screen, you can to configure the default time frame for collecting data that appears in your reports.

## About time delay considerations

SMART Vantage and SMART Vantage Enterprise software don't process information and commands in real time. For example, usage information (touch, viewing and sharing) from an interactive whiteboard isn't immediately available for inclusion in reports. SMART Vantage software polls your network periodically to collect the data of connected interactive whiteboards and projectors.



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# Generating SMART Vantage reports

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This chapter explains how to use SMART Vantage software to generate reports that provide information on SMART Board interactive whiteboard usage and projector bulb life status. Once SMART Vantage software is installed and connected to your interactive whiteboards and projectors, the software begins collecting usage data every 15 minutes.

### **IMPORTANT**

Each time someone touches an interactive whiteboard during the default reporting schedule (see *Customizing the power management and reporting schedule* on page 60), SMART Vantage software records the time and makes the data available for reports.

## CHAPTER 2

### Generating SMART Vantage reports

SMART Vantage software also records the time an interactive whiteboard is used for a session of viewing and sharing information during the default reporting schedule. However, the time of a viewing and sharing session is available for inclusion in a report only once that session ends.

#### TIP

You can save your reports and export them as CSV files.

## Accessing reports

To access the report functionality of SMART Vantage software you must first log onto the user interface through an Internet browser. For information on supported browsers, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).

### To access reports

1. Log onto the SMART Vantage software user interface (see *Logging onto the user interface* on page 8).
2. Click **Reports**.

The *New Report* window appears.

## Choosing a report

The table below identifies the reports you can generate and the information available from each report.

Report	Description
Combined hardware use (see <i>Combined hardware use report</i> on page 19)	Maximize your investment by determining how much your interactive whiteboards are used and the way they're used.
Compared hardware use (see <i>Compared hardware use report</i> on page 21)	Improve teaching and learning opportunities by comparing how different interactive whiteboards are used.
Combined software use (see <i>Combined software use report</i> on page 24)	Make effective use of your software applications by seeing which applications are used the most and how they're used with your interactive whiteboards.
Bulb status (see <i>Bulb status report</i> on page 28)	Reduce projector downtime by identifying which projector bulbs are approaching the end of their life expectancy.

## About hardware and software report configuration options

When you generate a hardware or software usage report in SMART Vantage software, you begin by selecting a type of report. You then use the report configuration options to determine the information that appears in a report and how that information is displayed. Specifically report configuration options enable you to do the following:

- Determine the time frame of recorded interactive whiteboard usage information that appears in a report.

### **i** NOTES

- All hardware and software usage reports feature a default time frame. This schedule is customizable within each report.
- You need administrator access to configure the default schedule used in reports (see *Customizing the power management and reporting schedule* on page 60).

- Select and configure usage display options that enable you to see how your interactive whiteboards are used.

Two usage display options are available:

- Interactive whiteboard usage display options
- Interactive touch threshold options

### Interactive whiteboard usage display options

You can display the following types of interactive whiteboard usage information in a report:

Type of usage	Description
Viewing/sharing information	How much your interactive whiteboards are used to present information and to collaborate.
Interactive touch information	How much interactive touch capability is used.
Viewing/sharing information and interactive touch information	How much interactive touch capability is used compared to presentation and collaboration time.

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### Generating SMART Vantage reports

#### Interactive touch threshold options

You can customize how much interactive touch capability is used before it's included in a report:

Type of threshold value customization	Description
How many touches must occur in a given time frame before interactive touch information is included in a report	<ul style="list-style-type: none"><li>• Decrease the touch threshold to include usage data for interactive whiteboards that are used primarily to present information.</li><li>• Increase the touch threshold to include usage data for interactive whiteboards that are used more for their interactive touch capability.</li></ul>
The time frame in which the touches occur	Try different time frames to understand the levels of interactive touch usage.

## Using the search function

The search function enables you to find interactive whiteboards and projectors in your inventory. You can search to find inventory items you want to include in reports. SMART Vantage software searches the location details and model information of each interactive whiteboard or projector in your inventory for matches to your search terms.

#### TIPS

- Choose from the search criteria drop-down menu to select whether your search results contain any, contain all or exclude all of your search terms.
- Select a group name from the drop-down list to the right of the search box to narrow your search to a group of interactive whiteboards and projectors. For more information on groups, see *Creating, editing, and deleting groups of inventory items* on page 57.

#### To search for an interactive whiteboard or projector

Type a search term in the search box, and then press ENTER.

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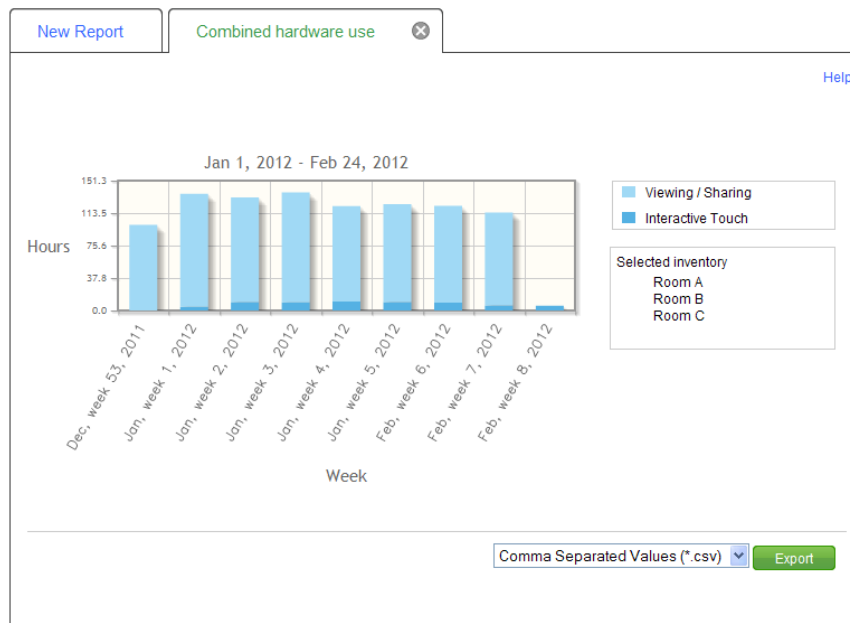
### Generating SMART Vantage reports

# Combined hardware use report

The *Combined hardware use* report enables you to generate a bar chart of combined interactive whiteboard usage information. Use this report to see usage patterns based on the following:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

### EXAMPLE



## Using this report

Use the *Combined hardware use* report to do the following:

- Understand how much your institution's interactive whiteboards are used.
- Determine usage patterns based on how your interactive whiteboards are used. Use the display options to determine whether interactive whiteboards are used more for displaying information than for generating interactive touch.

## Generating a Combined hardware use report

Use the following procedure to generate a *Combined hardware use* report.

### ■ To generate a Combined hardware use report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Combined hardware use report**.  
The *Combined hardware use: Select report options* are displayed.
3. Select a start date and end date for your report.
4. Click **More time options** to select which days of the week to view usage data from.

#### **NOTE**

The default *days to include* criteria is specified in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### **TIP**

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

6. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### **TIP**

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.



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7. Select the check box next to the systems you want to include in the report.

#### TIP

Find systems by using either of the following options:

- Use the search function to find a system in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of systems.

8. Click **Generate Report**.

The *Combined hardware use* report appears in a new window.

#### To export and save the Combined hardware use report

1. Browse to the *Combined hardware use* report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## Compared hardware use report

The *Compared hardware use* report enables you to generate a bar chart or line graph of comparative usage information. This report enables you to compare individual interactive whiteboard usage patterns based on the following:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

## CHAPTER 2

### Generating SMART Vantage reports

#### EXAMPLE



### Using this report

Use the *Compared hardware use* report to do the following:

- Understand different interactive whiteboard usage scenarios by comparing the usage of one interactive whiteboard to another.

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### Generating SMART Vantage reports

- Maximize your training budget by ensuring that each interactive whiteboard is used to its maximum potential. Select interactive whiteboards from your inventory and compare how each one is actually used.

#### EXAMPLE

In one hour a particular interactive whiteboard is touched 10 times which would indicate that it's being used to present information. Meanwhile, another interactive whiteboard is touched 20 times, indicating the use of interactive tools, and yet another interactive whiteboard is touched 70 times, indicating a more collaborative environment.

## Generating a Compared hardware use report

Use the following procedure to generate a *Compared hardware use* report.

### ■ To generate a Compared hardware use report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Compared hardware use report**.  
The *Compared hardware use: Select report options* are displayed.
3. Select a start date and end date for your report.
4. Click **More time options** to select which days of the week to view usage data from.

#### NOTE

The default *days to include* criteria is specified in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select how the usage data is displayed (**Line chart** or **Pie chart**).
6. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### TIP

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

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### Generating SMART Vantage reports

7. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### TIP

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.

8. Select the check box next to the systems or groups you want to include in the report.

#### TIP

Find systems by using either of the following options:

- Use the search function to find a system in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of systems.

9. Click **Generate Report**.

The *Compared hardware use* report appears in a new window.

### To export and save the Compared hardware use report

1. Browse to the *Compared hardware use* report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## Combined software use report

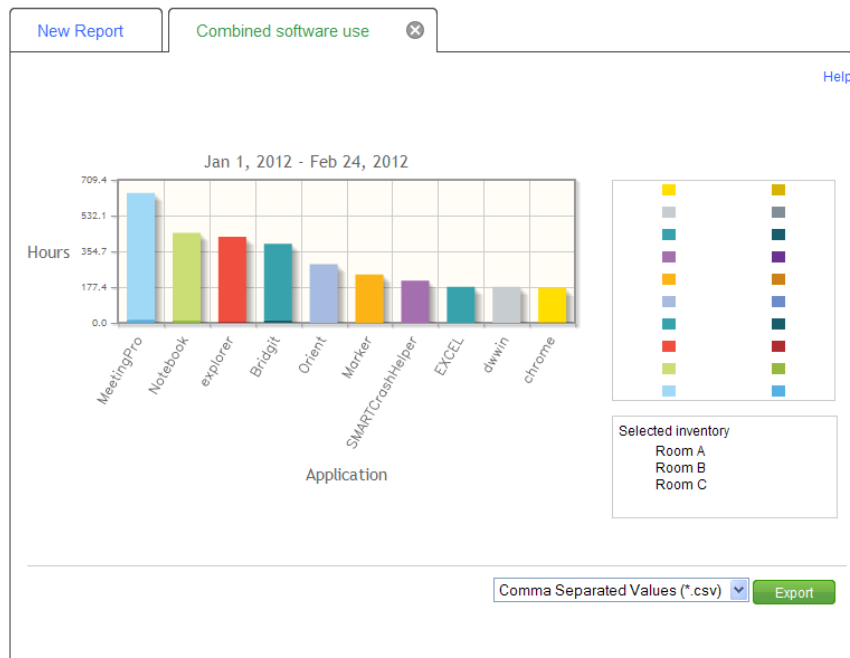
The *Combined software use* report enables you to generate a line graph or pie chart that identifies the software applications most commonly used with your interactive whiteboards. This report enables you to compare how your institution's interactive whiteboards are being used with your institution's most popular software applications by comparing usage patterns based on:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

## CHAPTER 2

### Generating SMART Vantage reports

#### EXAMPLE



#### Using this report

Use the *Combined software use* report to do the following:

- Compare the total number of hours each software application is used to view information versus generating interactive touch usage. You can then identify the top software applications that were used and the level of interactive touch that each one generated.
- Track the usage patterns of new software applications and determine how much and how they are being used.

#### EXAMPLE

If you've invested in a software application designed to facilitate and encourage interactive usage, track the use of the software application and determine whether it's being used to its fullest potential.

- Reduce the touch threshold to determine how often a software application is used to present information.

## Generating a Combined software use report

Use the following procedure to generate a *Combined software use* report.

### ■ To generate a Combined software use report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Combined software use report**.  
The *Combined software use: Select report options* are displayed.
3. Select a start date and end date for your report.
4. Click **More time options** to select which days of the week to view usage data from.

#### **NOTE**

The default *days to include* criteria is specified in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### **TIP**

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

6. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### **TIP**

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.

## CHAPTER 2

### Generating SMART Vantage reports

7. Click **More display options**, and then select how usage data will be filtered. Select one of the following options:

Option	Description
<b>Top...applications</b>	Type the number of most used software applications you want to include in a report.  <b>i NOTE</b>  Software application use is based on the type of usage data you choose to include in the report. If you selected both <b>Viewing/Sharing</b> and <b>interactive touch</b> , software application use is filtered on the time an application was used for viewing and sharing information.
<b>In focus for more than...minutes per...</b>	Specify the minimum number of minutes per hour, day, week or month, that a software application has been displayed on an interactive whiteboard before it is included in the report.

8. Select the check box next to the systems you want to include in the report.

#### **TIP**

Find systems by using either of the following options:

- Use the search function to find a system in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of systems.

9. Click **Generate Report**.

The *Combined software use* report appears in a new window.

#### **TIP**

If the interactive touch information is obscuring the viewing/sharing information in a report, use touches per minute threshold values that enable you to see viewing/sharing information in a report.

### **To export and save the Combined software use report**

1. Browse to the *Combined software use* report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## CHAPTER 2

### Generating SMART Vantage reports

## Bulb status report

Use the *Bulb status* report to select projectors from your inventory and obtain information on how many hours a projector's bulb has been in use. You can select to display projectors with bulbs that require the following:

- Replace bulb immediately
- Replace bulb soon
- No action

### **i** NOTE

The projector bulb life status shown in a report is based on values assigned to the caution and warning values in the notifications dialog box. Administrator access is required to configure bulb notification values (see *Configuring projector bulb warning notifications* on page 62).

### EXAMPLE

Status	System	Location	Used (hours)	Spec (hours)	Bulb Part No.
●	UF75	Room A	509	2500	1007582
●	UX60	Room C	1349	2500	20-01175-20
●	UF75	Room B	1240	2500	1007582



## CHAPTER 2

### Generating SMART Vantage reports

#### Using this report

Use the *Bulb status* report to reduce the lead time on projector bulb purchases by placing your order based on a projector bulb's current life expectancy status. This reduces downtime when a bulb expires.

#### IMPORTANT

The default projector bulb warning notification threshold values used in reports are based on projectors operating in standard mode. If your projectors are configured to operate in economy mode, consult the SMART Board interactive whiteboard system user's for your projector for more information on threshold values.

Obtain information on your projector bulbs including the following:

- A bulb's life expectancy status
- How many hours the bulb has been in use

#### Generating a Bulb status report

Use the following procedure to generate a *Bulb status* report.

#### To generate a Bulb status report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Bulb status**.  
The *Bulb status* report options appear.

## CHAPTER 2

### Generating SMART Vantage reports

3. Select which bulb life status information to include in a report:

Option	Description
<b>Display red (warning) - replace bulb immediately</b>	Identifies which projector bulbs are close to the end of their predicted life span and should be replaced immediately.
<b>Display yellow (caution) - replace soon</b>	Identifies which projector bulbs are approaching the end of their predicted life and should be replaced soon.
<b>Display green (normal) - no action required</b>	Identifies which projector bulbs have sufficient life expectancy and do not need to be replaced.

#### TIP

- You can use the default set of bulb notification values or add your own values. For more information, see *Assigning bulb warning notification values* on page 63.
- Information on bulbs that need to be replaced immediately and bulbs that need to be replaced soon are displayed in a report by default. To display more bulb life status data, select **Display green (normal) - no action required**.

4. Select the check box next to the projector you want to include in the report:

#### TIP

Find projectors by using either of the following options:

- Use the search function to find a system in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of systems.

5. Click **Generate Report**.

The *Bulb status* report for your projectors appears in a new window.

### To export and save the Bulb status report

1. Browse to the Bulb status report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## Chapter 3

# Generating SMART Vantage Enterprise reports

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This chapter explains how to use SMART Vantage Enterprise software to generate reports that provide information on SMART Board interactive whiteboard usage and projector bulb life status from institutions across your enterprise or district that have implemented SMART Vantage software.

### **IMPORTANT**

You are unable to access reports until you add at least one institution to your inventory.

### **TIP**

You can save your reports and export them as CSV files.

## Accessing reports

To access the report functionality of SMART Vantage Enterprise software you must first log onto the user interface through an Internet browser. For information on supported browsers, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).

### ■ To access reports

1. Log onto the SMART Vantage Enterprise software user interface (see *Logging onto the user interface* on page 8).
2. Click **Reports**.

The *New Report* window appears.

## Choosing a report

This section provides information to enable you to choose which reports to generate. The table below identifies the reports you can generate and the information available from each report.

Report	Description
Combined hardware use (see <i>Combined hardware use report</i> on page 35)	Maximize your enterprise or district's investment by determining how much your institutions' interactive whiteboards are used and the way they're used.
Compared hardware use (see <i>Compared hardware use report</i> on page 37)	Improve teaching and learning opportunities by comparing how different institutions use their interactive whiteboards.
Combined software use (see <i>Combined software use report</i> on page 40)	Make effective use of your enterprise or district's investment by seeing which software applications are used the most and how they're used with your institutions' interactive whiteboards.
Bulb status (see <i>Bulb status report</i> on page 44)	Reduce projector downtime in your institutions by identifying which projector bulbs are approaching the end of their predicted life expectancy.

## About hardware and software report configuration options

When you generate a hardware or software usage report in SMART Vantage Enterprise software, you begin by selecting a type of report. You then use the report configuration options to determine the information that appears in a report and how that information is displayed. Specifically, report configuration options enable you to do the following:

- Determine the time frame of recorded interactive whiteboard usage information that appears in a report.

### **i** NOTE

All hardware and software usage reports feature a default usage schedule that determines the timeframe of recorded usage information that appears in a report. This schedule is customizable within each report.

Administrator user access is required to configure the default schedule used in reports (see *Customizing the power management and reporting schedule* on page 60).

- Select and configure usage display options that enable you to see how institutions across your enterprise or district are using their interactive whiteboards.

Two usage display options are available:

- Interactive whiteboard usage display options
- Interactive touch threshold options

### Interactive whiteboard usage display options

You can display the following types of interactive whiteboard usage information in a report:

Type of usage	Description
Viewing/sharing information	How much your interactive whiteboards are used to present information and to collaborate.
Interactive touch information	How much interactive touch capability is used.
Viewing/sharing information and interactive touch information	How much interactive touch capability is used compared to presentation and collaboration time.

## CHAPTER 3

Generating SMART Vantage Enterprise reports

### Interactive touch threshold options

You can customize how much interactive touch capability is used before it's included in a report:

Type of threshold value customization	Description
How many touches must occur in a given time frame before interactive touch information is included in a report	<ul style="list-style-type: none"><li>• Decrease the touch threshold to include usage data for interactive whiteboards that are used primarily to present information.</li><li>• Increase the touch threshold to include usage data for interactive whiteboards that are used more for their interactive touch capability.</li></ul>
The time frame in which the touches occur	Try different time frames to understand the levels of interactive touch usage.

## Using the search function

You can use the search function in the *Manage Institutions* tab, to find institutions in your inventory.

### NOTE

SMART Vantage Enterprise software searches the name and host/IP address of institutions in your inventory for matches to your search terms.

### TIPS

- Choose from the search criteria drop-down menu to select whether your search results contain any, contain all or exclude all of your search terms.
- Select a group name from the drop-down list to the right of the search box to search for institutions where inventory items are grouped by name.

### To search for an institution

Type a search term in the search box, and then press ENTER.

## CHAPTER 3

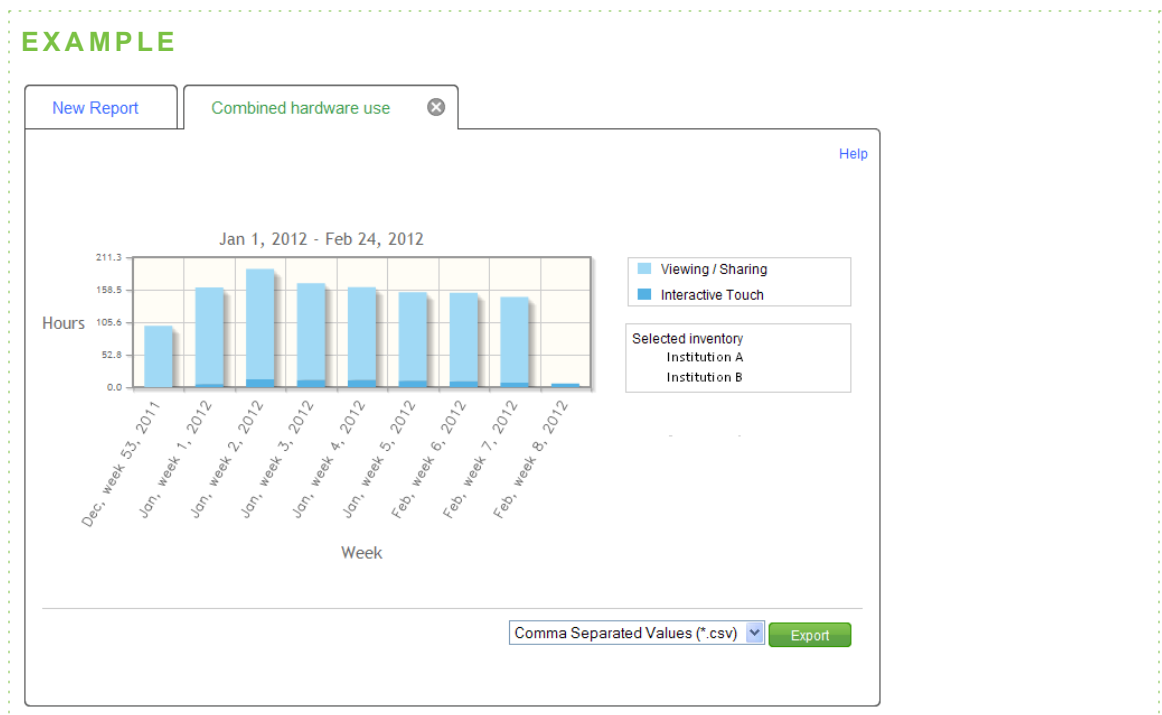
Generating SMART Vantage Enterprise reports

# Combined hardware use report

The *Combined hardware use* report enables you to generate a bar chart of combined usage information from institutions selected from your inventory. Use this report to see usage patterns based on the following:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

### EXAMPLE



## Using this report

Use the *Combined hardware use* report to do the following:

- Understand how much institutions across your enterprise or district use their interactive whiteboards.
- Determine usage patterns based on how institutions use their interactive whiteboards. Use the display options to determine whether institutions are using their interactive whiteboards more for displaying information than for generating interactive touch.

## Generating a Combined hardware use report

Use the following procedure to generate a *Combined hardware use* report.

### ■ To generate a Combined hardware use report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Combined hardware use report**.  
The *Combined hardware use: Select report options* are displayed.
3. Select a start date and end date for your report.
4. Click **More time options** to select which days of the week to view usage data from.

#### **NOTE**

The default *days to include* criteria is specified in the in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### **TIP**

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

6. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### **TIP**

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.



## CHAPTER 3

### Generating SMART Vantage Enterprise reports

7. Select the check box next to the institutions you want to include in the report.

#### TIP

Find institutions by using either of the following options:

- Use the search function to find an institution in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of institutions.

8. Click **Generate Report**.

The *Combined hardware use* report appears in a new window.

#### To export and save the Combined hardware use report

1. Browse to the *Combined hardware use* report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## Compared hardware use report

The *Compared hardware use* report enables you to generate a bar chart or line graph of comparative usage information. Use this report enables you to compare individual institutions' interactive whiteboard usage patterns based on the following:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

## CHAPTER 3

### Generating SMART Vantage Enterprise reports

#### EXAMPLE



### Using this report

Use the *Compared hardware use* report to do the following:

- Understand different institutions' interactive whiteboard usage scenarios by comparing the institution's usage information to another.
- Maximize your training budget by ensuring that each institution uses its interactive whiteboards to their maximum potential. Select institutions from your inventory and compare how each institution is actually using its interactive whiteboards.

## Generating a Compared hardware use report

Use the following procedure to generate a *Compared hardware use* report.

### ■ To generate a Compared hardware use report

1. Click **Reports**.

The *New Report* window appears.

2. Browse to the *Selected report type* list, and then click **Compared hardware use report**.

The *Compared hardware use: Select report options* are displayed.

3. Select a start date and end date for your report.

4. Click **More time options** to select which days of the week to view usage data from.

#### **NOTE**

The default *days to include* criteria is specified in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select how the usage data is displayed (**Line chart** or **Pie chart**).
6. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### **TIP**

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

7. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### **TIP**

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.

## CHAPTER 3

### Generating SMART Vantage Enterprise reports

8. Select the check box next to the institutions or groups you want to include in the report.

#### TIP

Find institutions by using either of the following options:

- Use the search function to find an institution in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of institutions.

9. Click **Generate Report**.

The *Compared hardware use* report appears in a new window.

#### To export and save the Compared hardware use report

1. Browse to the *Compared hardware use* report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

## Combined software use report

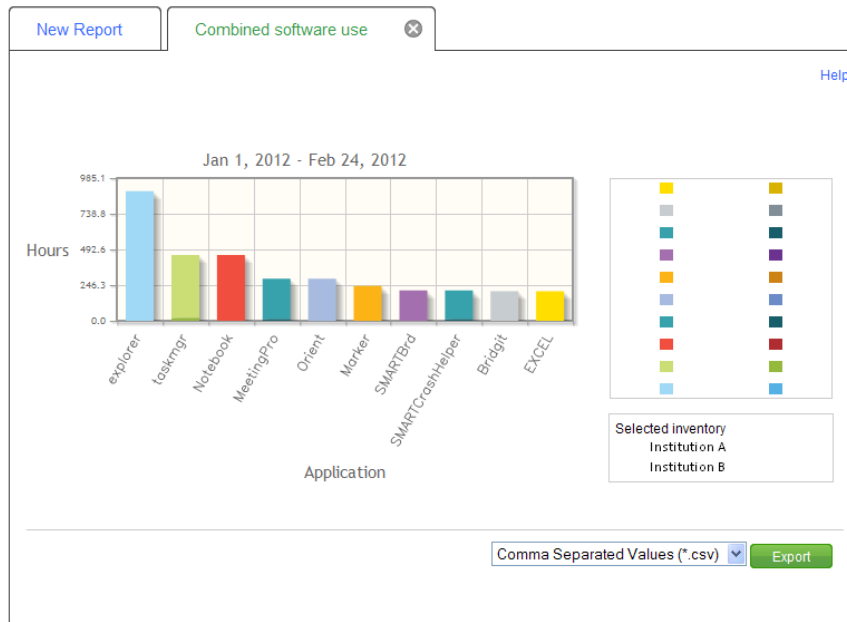
The *Combined software use* report enables you to generate a line graph or pie chart that identifies the software applications most commonly used with interactive whiteboards in the institutions across your enterprise or district. This report enables you to compare how institutions across your enterprise or district use their interactive whiteboards with your enterprise or district's most popular software applications. Use this report to show how software applications are used by comparing usage patterns based on the following:

- Interactive touch
- Viewing or displaying information
- Viewing or displaying information versus interactive touch

## CHAPTER 3

### Generating SMART Vantage Enterprise reports

#### EXAMPLE



### Using this report

Use the *Combined software use* report to do the following:

- Compare the total number of hours each software application is used to view information versus generating interactive touch usage. You can then identify the top software applications that were used and the level of interactive touch that each one generated.
- Track the usage patterns of new software applications and determine how much and how they are being used.

#### EXAMPLE

If your enterprise or district has invested in a software application designed to facilitate and encourage interactive usage, track the use of the software application and determine whether it's being used to its full potential.

- Reduce the touches threshold to determine how often a software application is used to present information.

## Generating a Combined software use report

Use the following procedure to generate a *Combined software use* report.

### ■ To generate a Combined software use report

1. Click **Reports**.  
The *New Report* window appears.
2. Browse to the *Selected report type* list, and then click **Combined software use report**.  
The *Combined software use: Select report options* are displayed.
3. Select a start date and end date for your report.
4. Click **More time options** to select which days of the week to view usage data from.

#### **NOTE**

The default *days to include* criteria is specified in the *Customize* tab on the Settings screen. Administrator access is required to change this setting. For more information, see *Customizing the power management and reporting schedule* on page 60.

5. Select which types of usage data to include in the report (**Viewing/sharing**, **Interactive touch** or both).

#### **TIP**

Select both **Viewing/sharing** and **Interactive touch** to generate a report that provides comparative data on the selected options.

6. You can use the default **Threshold: at least** and **Touch(es) per** values. However, if the interactive touch information is obscuring the viewing/sharing information in a report, use a touches per minute threshold value that enables you to see viewing/sharing information in a report.

#### **TIP**

Click **More display options** to select a different time unit to measure the X-axis time frame in reports. The default unit is weekly.

- Click **More display options**, and then select how usage data will be filtered. Select one of the following options:

Option	Description
<b>Top...applications</b>	Type the number of most used software applications you want to include in a report.
<p><b>i NOTE</b></p> <p>Software application use is based on the type of usage data you choose to include in the report. If you selected both <b>Viewing/Sharing</b> and <b>interactive touch</b>, software application use is filtered on the time an application was used for viewing and sharing information.</p>	
<b>In focus for more than...minutes per...</b>	Specify the minimum number of minutes per hour, day, week or month, that a software application has been displayed on selected institutions' interactive whiteboards before it is included in the report.

- Select the check box next to the institutions you want to include in the report.

**TIP**

Find institutions by using either of the following options:

- Use the search function to find an institution in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of institutions.

- Click **Generate Report**.

The *Combined software use* report appears in a new window.

**To export and save the Combined software use report**

- Browse to the *Combined software use* report you want to save.
- Select a file format from the drop-down list.
- Click **Export**.
- Browse to a folder, type a name for the file, and then click **Save**.

## Bulb status report

Use the *Bulb status* report to select institutions from your inventory and obtain information on how many hours their projector's bulbs have been in use. You can select to display institutions with projector bulbs that require the following:

- Replace bulb immediately
- Replace bulb soon
- No action

**i NOTE**

The projector bulb life status shown in a report is based on values assigned to the caution and warning values in SMART Vantage software. Administrator access is required to configure bulb notification values (see *Configuring projector bulb warning notifications* on page 62).

**EXAMPLE**

Bulb Status: Vantage Ottawa , Vantage Calgary Bulb status

Summary **0** Bulb(s) need replacing **6** Location(s) Room B, Room 1, Room 2, Room A, Room 3, Room C **3** Part(s) 01-00281-20, 20-01175-20, 1007582

Status	System	Location	Used (hours)	Spec (hours)	Bulb Part No.	Institution
●	UF75	Room 1	510	2500	1007582	Institution A
●	UX60	Room A	1350	2500	20-01175-20	Institution B
●	UF75	Room 2	1241	2500	1007582	Institution A
●	UF75	Room B	114	2500	1007582	Institution B
●	UX60	Room 3	1630	2500	20-01175-20	Institution A
●	V25	Room C	591	4500	01-00281-20	Institution B

Comma Separated Values (\*.csv) Export



## CHAPTER 3

### Generating SMART Vantage Enterprise reports

#### Using this report

Use the *Bulb status* report to reduce the lead time on projector bulb purchases by placing your order based on a projector bulb's current life expectancy status. This reduces downtime when a bulb expires.

#### IMPORTANT

The default projector bulb warning notification threshold values used in reports are based on projectors operating in standard mode. If an institution's projectors are configured to operate in economy mode, consult the SMART Board interactive whiteboard system user's for these projectors for more information on threshold values.

Obtain information on your institution's projector bulbs includes the following:

- A bulb's life expectancy status
- How many hours the bulb has been in use

#### Generating a Bulb status report

Use the following procedure to generate a *Bulb status* report.

#### To generate a Bulb status report

1. Click **Reports**.

The *New Report* window appears.

2. Browse to the *Selected report type* list, and then click **Bulb status**.

The *Bulb status* report options appear.

3. Select which bulb life status information to include in a report:

Option	Description
<b>Display red (warning) - replace bulb immediately</b>	Identifies which projector bulbs are close to the end of their predicted life span and should be replaced immediately.
<b>Display yellow (caution) - replace soon</b>	Identifies which projector bulbs are approaching the end of their predicted life and should be replaced soon.
<b>Display green (normal) - no action required</b>	Identifies which projector bulbs have sufficient life expectancy and do not need to be replaced.

 **TIP**

- You can use the default set of bulb notification values or add your own values. For more information, see *Assigning bulb warning notification values* on page 63.
- Information on bulbs that need to be replaced immediately and bulbs that need to be replaced soon are displayed in a report by default. To display more bulb life status data, select **Display green (normal) - no action required**.

4. Select the check box next to the projector you want to include in the report:

 **TIP**

Find projectors by using either of the following options:

- Use the search function to find an institution in your inventory list (see *Using the search function* on page 18).
- Click the drop-down list next to the *Search* button to find a group of institutions.

5. Click **Generate Report**.

The *Bulb status* report for your projectors appears in a new window.

 **To export and save the Bulb status report**

1. Browse to the Bulb status report you want to save.
2. Select a file format from the drop-down list.
3. Click **Export**.
4. Browse to a folder, type a name for the file, and then click **Save**.

# Chapter 4

## Configuring and managing SMART Vantage software

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This chapter is intended for administrators of SMART Vantage technology-management software. It explains how to configure and manage SMART Vantage software and SMART Vantage Enterprise software. You must log on as an administrator to access the features and functionality described in this chapter. For more information on user access levels, see *About roles and permissions* on page 7.

## Configuring and managing a SMART Vantage Institution software implementation

This section explains the setup procedures you must complete before obtaining usage data from your SMART Board interactive whiteboards and bulb life status from your projectors.

### **IMPORTANT**

SMART Vantage software must be installed on your institution's server and be configured and activated before you can start the procedures in this chapter. SMART Vantage software must have a network connection to the interactive whiteboards and projectors in your institution that you want to manage.

### **TIPS**

- For information on installing SMART Vantage Institution level software, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).
- For information on logging onto and navigating the SMART Vantage administrator interface, see *Logging onto the user interface* on page 8 and *SMART Vantage software* on page 10.

You begin configuring your SMART Vantage institution software by doing the following:

1. Setting the name of your institution in SMART Vantage software (see *Setting an institution name* on the next page).
2. Adding interactive whiteboards and projectors to SMART Vantage software's inventory list (see *Adding items to your inventory* on the next page).
3. Configuring the inventory listing of each interactive whiteboard and projector (see *Creating, editing, and deleting groups of inventory items* on page 57).
4. Adding a projector password to enable SMART Vantage software to apply power management schedules and to obtain bulb life status from projectors that have password protected service menus (see *Adding a projector password* on page 59).
5. Customizing the institution schedule, which determines what time your projectors are placed in Standby mode and which sets the default filter data used in reports (see *Customizing the power management and reporting schedule* on page 60).
6. Configuring projector bulb life status notifications and selecting an e-mail address to send them to (see *Configuring projector bulb warning notifications* on page 62).

## CHAPTER 4

Configuring and managing SMART Vantage software

Manage your SMART Vantage institution software implementation by doing the following:

- Enabling the autodiscovery feature to enable SMART Vantage software to continue collecting usage data from interactive whiteboards when the computer connecting them to your network changes to a different computer (see *Enabling autodiscovery* on page 64).
- Editing and deleting inventory item details (*Editing and deleting inventory items* on page 66).
- Checking an inventory item's connection status to SMART Vantage software (see *Checking the connection of an inventory item* on page 66).
- Manually turning on your projectors or placing them in Standby mode (see *Manually controlling the power status of projectors* on page 67).

### Setting an institution name

Setting a name for your school or institution helps identify your hosting of SMART Vantage software in usage reports and projector bulb status notifications.

#### To set a name for your institution

1. Click **Settings**.  
The *Settings* window appears.
2. Click the **Customize** tab.  
The *Customize* dialog box appears.
3. Browse to the *Your Institution* dialog box and type a name for your institution in the *Name* box.
4. Click **Save**.  
The name for your institution is saved.

### Adding items to your inventory

You can add interactive whiteboards and projectors to your SMART Vantage inventory list in either of these two ways:

Manually adding individual interactive whiteboards and projectors using the *New System* screen

OR

Importing details of your institution's interactive whiteboards and projectors in a CSV file.

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#### NOTE

Interactive whiteboard and bulb life status data is available approximately 15 minutes after you add a device to the SMART Vantage software inventory.

#### TIP

You can also export a CSV file containing details of all the interactive whiteboards and projectors that SMART Vantage software is managing.

### Manually adding an inventory item

The *New System* screen enables you to manually add an interactive whiteboard or projector to your SMART Vantage inventory list.

#### IMPORTANT

The projectors you add to the SMART Vantage inventory list must be connected to your institution's network either directly or through the computer connected to the interactive whiteboard they are being used with. For more information on connecting your interactive whiteboard and projector to a network, see the SMART Board interactive whiteboard system user's guide for the systems you are connecting.

#### NOTE

If you're adding an interactive whiteboard system to your inventory, use the *New System* screen to enter details of the system's interactive whiteboard and projector in the same inventory listing.

#### TIPS

- Record the host name or IP address of the computer connected to each interactive whiteboard and projector that you want to add to your inventory. If a projector you're adding is connected directly to your network, record the IP address of the projector. SMART Vantage software needs the IP address to identify and connect to each interactive whiteboard and projector that you add to your inventory list.
- For information on obtaining the IP address of a projector connected directly to your network, see the relevant SMART Board interactive whiteboard system user's guide.
- SMART Vantage Institution software will automatically detect the serial number of the an interactive whiteboard's controller and not the actual serial number of the interactive whiteboard itself. See below for information on where you can add a serial number to the details of each interactive whiteboard inventory listing.


**To add an interactive whiteboard to your inventory**

1. Click **System Manager**.  
The *System Manager* window appears.

2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.

3. Click **New System**.  
The system information dialog box appears.

4. Type the following information in the relevant text boxes:

Text box	Information
<i>Location</i>	The physical location of this interactive whiteboard <div style="border: 1px dashed green; padding: 5px; margin: 5px 0;"> <b>EXAMPLE</b>                      The room number an interactive whiteboard is located in                 </div>
<i>Notes</i>	Optional information about this interactive whiteboard <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"> <p> <b>TIP</b></p> <p>Add information identifying which model of interactive whiteboard this inventory listing is associated with. This information is particularly useful in situations where you're using a centralized inventory management system that includes many interactive whiteboards and projectors.</p> </div>

** NOTE**

If you want to add the interactive whiteboard to a group, select a group from the *Groups* drop-down list. For more information on groups, see *Creating, editing, and deleting groups of inventory items* on page 57.

5. Scroll to the *SMART Board interactive whiteboard details* section, and then type the host name or IP address of the computer connected to the interactive whiteboard you're adding in the *Host/IP address* box.

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### 6. Click **Connect**.

When you click the **Connect** button SMART Vantage software attempts to connect to the computer connected to the interactive whiteboard you're adding.

- If the connection is successful, a message appears confirming the connection and the following information is displayed:
  - The interactive whiteboard model number
  - The controller serial number
- If the connection is unsuccessful, a message appears indicating that an interactive whiteboard wasn't found at the IP address that you typed.


#### **NOTE**

If you don't click the **Connect** button before you save your interactive whiteboard information, SMART Vantage software keeps attempting to connect to your interactive whiteboard approximately every 15 minutes.

#### **TIP**

Check the network connection to your interactive whiteboard if you're unable to establish a connection with SMART Vantage software.

### 7. Type the following information in the appropriate boxes:

<b>Text box</b>	<b>Information</b>
<i>Asset ID</i>	The ID number your institution assigned to this interactive whiteboard
<i>Interactive whiteboard serial number</i>	The serial number of this interactive whiteboard
	 <b>TIP</b> SMART Vantage software doesn't automatically recognize an interactive whiteboard's serial number. Adding the serial number can be helpful for identifying an interactive whiteboard for inventory management purposes.
<i>Date installed</i>	The date your interactive whiteboard was installed

### 8. Click **Save Changes**.

Your interactive whiteboard is added to your inventory of devices that SMART Vantage software is managing.



**To add a projector to your inventory**

1. Click **System Manager**.  
The *System Manager* window appears.
2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.
3. Click **New System**.  
The system information dialog box appears.

4. Type the following information the appropriate text boxes:

Text box	Information
<i>Location</i>	The physical location of this projector  <b>EXAMPLE</b> The room number a projector is located in
<i>Notes</i>	Optional information about this projector  <b>TIP</b> Add information identifying which model of projector this inventory listing is associated with. This information is particularly useful in situations where you're using centralized inventory management system that includes many interactive whiteboards and projectors.

**NOTE**

If you want to add the projector to a group, select a group from the *Groups* drop-down list. For more information on groups, see *Creating, editing, and deleting groups of inventory items* on page 57.

5. If you want to turn your projector off according to a power management schedule, select **Turn off according to the schedule**. For more information on creating a power management schedule, see *Customizing the power management and reporting schedule* on page 60.
6. Scroll to the *Projector details* section, and then type the host name or IP address of the projector you're adding in the *Host/IP address* box.

**IMPORTANT**

You must also type a hostname or IP address in the *SMART interactive whiteboard details* section text box. This can be any value and is not used for any connection purposes.

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7. Click **Connect**.

When you click the button Connect SMART Vantage software attempts to connect to the projector.

If the connection is successful, a message appears confirming the connection and the following information is displayed:

- The projector model number
- The MAC address
- The projector serial number

If the connection is unsuccessful, a message appears indicating that a projector wasn't found at the IP address that you typed.

 **NOTE**

If you don't click the **Connect** button before you save your projector information, SMART Vantage software keeps attempting to connect to your projector approximately every 15 minutes.

 **TIP**

Check the network connection to your projector if you're unable to establish a connection with your SMART Vantage institution software.

8. Type following information in the appropriate boxes:

<b>Text box</b>	<b>Information</b>
<i>Asset ID</i>	The ID number your institution assigned to this projector
<i>Date installed</i>	The date this projector was installed
<i>Password</i>	The password used to access the projector's service menu For more information on adding projector passwords to SMART Vantage software, see <i>Adding a projector password</i> on page 59.

9. Click **Save Changes**.

Your projector is added to your inventory of devices that SMART Vantage software is managing.

### Importing and exporting inventory lists

You can add multiple items to the inventory of devices SMART Vantage software is managing by importing a CSV file containing details of your institution's interactive whiteboards and projectors.

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You can also export a CSV file containing details of the interactive whiteboards and projectors in your inventory.

#### NOTES

- Interactive whiteboards and projectors already listed in your SMART Vantage inventory will not be added again.
- If you want to turn off projectors you import according to a power management schedule, browse to the *Manage Inventory* window and individually edit each projector's profile by enabling this feature. See step five in the procedure *To add a projector to your inventory* in *Manually adding an inventory item* on page 50.

#### TIP

You can import a CSV file again at a later time, for example, when you complete a new installation of SMART Vantage software.

#### To create a CSV file of your interactive whiteboards and projectors

1. Use a database or spreadsheet program to create a document containing the column headings listed in step 2 below. Refer to your software's Help system or user's guide for more information.

#### TIP

Use the *To export a CSV file containing inventory items* procedure on page 54 to obtain a template of the spreadsheet and to identify which column headings to include. This procedure can be used even if you haven't added any items to your SMART Vantage software inventory.



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2. Begin adding details of your institution's interactive whiteboards and projectors to the spreadsheet or database. Use the table below to identify the information required for each device. The information varies based on the device and how the devices are connected to your network.

### NOTE

The information identified below is the minimum required to add interactive whiteboards and projectors to your SMART Vantage inventory.

Device	Network	Required information
Interactive whiteboard	Connected to your institution's network through a computer	<i>Host/IP Address and Location home</i>
Projector	Connected to your institution's network through a computer	<i>Host/IP Address and Location home</i>  <b>IMPORTANT</b> You must also type the Host/IP Address in the <i>Projector Host/IP Address</i> box.
Projector	Connected to the network	<i>Projector Host/IP Address and Location home</i>  <b>IMPORTANT</b> You must also type the Projector Host/IP Address in the <i>Host/IP Address</i> box.

3. Save the database or spreadsheet as a CSV file.

### To import a CSV file containing inventory items

1. Click **System Manager**.  
The *System Manager* window appears.
2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.
3. Click **Import**.  
The *Import* page appears.
4. Click **Browse**.  
The *Choose File to Upload* dialog box appears.
5. Browse to and select the CSV file.
6. Click **Open**.

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7. Click **Submit**.

A dialog box appears confirming how many systems were added to your inventory.

### ■ To export a CSV file containing inventory items

1. Click **System Manager**.

The *System Manager* window appears.

2. Click the **Manage Inventory** tab.

The *Manage Inventory* dialog box appears.

3. Click **Export**.

The *File Download dialog* box appears.

4. Click **Save**.

5. Browse to a folder, type a name for the file, and then click **Save**.

## Creating, editing, and deleting groups of inventory items

SMART Vantage software enables you to efficiently manage your inventory of interactive whiteboards and projectors by creating groups and then adding inventory items to a group. Creating a group of interactive whiteboards and projectors enables you to easily and efficiently apply your institution's power management and reporting schedule to a group of inventory items.

Using groups also enables you to easily select inventory items for inclusion in reports you generate.

### ■ To add a group

1. Click **System Manager**.

The *System Manager* window appears.

2. Click the **Manage Groups** tab.

The *Manage Groups* dialog box appears.

3. Click **Add Group**.

The *Create a group to organize your systems* dialog box appears.

4. Type a name for your new group in the *Group Name* dialog box.

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5. Add an interactive whiteboard, projector or existing group by using one of the following procedures:
  - Browse the inventory list and select the check box next to the interactive whiteboard or projector you want to add.
  - Use the search function to find and then select an interactive whiteboard or projector.
  - Use the groups drop-down list to find and then select an interactive whiteboard or projector from a group you previously created.
6. Click **Save Changes**.

### To edit a group's details

1. Click **System Manager**.

The *System Manager* window appears.
2. Click the **Manage Groups** tab.

The *Manage Groups* dialog box appears.
3. Select the group you want to edit, and then click **Edit**.

The *Create a group to organize your systems* dialog box appears.
4. Edit the details of your group.
5. Click **Save Changes**.



### IMPORTANT

- Deleting a group of interactive whiteboards and projectors does not affect their individual inventory item listings.
- If you applied a power management schedule to your projectors at a group level, the schedule still applies to the individual projectors when the group they belong to is deleted.

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### To delete a group

1. Click **System Manager**.

The *System Manager* window appears.

2. Click the **Manage Groups** tab.

The *Manage Groups* dialog box appears.

3. Select the group you want to delete, and then click **Delete**.

A message appears asking you to confirm that you want to remove the selected group.

4. Click **Yes**.

## Adding a projector password

### **IMPORTANT**

If your projectors require a password to access their service menus, you must add this password to SMART Vantage software. You are unable to retrieve bulb life status information and to apply a projector power management schedule to these projectors until you add a password.

### **TIP**

For information on projector passwords, see the SMART Board interactive whiteboard system user's guide for your projector.

You can use two different procedures to add projector passwords to SMART Vantage software. Your choice of procedure depends on whether you want to use the same password to access all the projectors in your inventory or to add projector-specific passwords.

<b>Procedure</b>	<b>Explanation</b>
Adding a default password	Add a default password if all your institution's projectors use the same password to access their service menus. This password is used to access all projectors you add to your SMART Vantage institution software inventory.
Adding a password to a projector's inventory listing details.	Add projector-specific passwords if your institution's projectors each use a different password to access their service menu. Projector-specific passwords are added to a projector's inventory listing details (see <i>Manually adding an inventory item</i> on page 50).

### **IMPORTANT**

When you add a projector-specific password SMART Vantage software uses it as the default password to access the projector associated with it.

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### ■ To add a default projector password

1. Click **Settings**.  
The *Settings* window appears.
2. Click the **Customize** tab.  
The *Customize* dialog box appears.
3. Scroll to the *Projector password* section.
4. Type a password in the *Default projector password* box.
5. Click **Save**.

### ■ To add a projector-specific password

1. Click **System Manager**.  
The *System Manager* window appears.
2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.
3. Scroll to and select the projector that you want to add a password to, and then click **Edit**.  
The system information page appears.
4. Scroll to the *Projector details* box, and then type the password in the *Password* box.
5. Click **Save Changes**.

## Customizing the power management and reporting schedule

You can customize and apply a schedule to manage the power status of projectors in your inventory. Projectors added to the schedule are automatically placed in Standby mode at a time determined by the schedule, and they remain in Standby mode until they're manually turned on again.

The schedule used to manage the power status of your projectors, is also used in reports as the default schedule that determines the timeframe of recorded interactive whiteboard usage information that appears in a report. You can customize the schedule in each report you generate.



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### **IMPORTANT**

Actions that are based on your schedule only run once within a 24 hour time period. If an action has run (for example placing projectors in Standby mode) and you make changes to your schedule, the changes you make are not applied until the next time period. Time periods run from midnight to midnight.

### **To customize the institution schedule**

1. Click **Settings**.  
The Settings window appears.
2. Click the **Customize** tab.  
The *Customize* dialog box appears.
3. Scroll to the *Schedule* section.
4. Select the **Days** check boxes for the days you want your power management schedule to apply to.
5. Click in the **Start time** box and scroll to select a start time.
6. Click in the **End time** box and scroll to select an end time.
7. Click **Save Changes**.

### **Adding projectors to and removing them from the schedule**

Use the following procedures to add projectors to or remove projectors from your school or institution's SMART Vantage software schedule.

### **IMPORTANT**

You can apply one change to your schedule within a 24 hour time period. If you make more changes to your schedule within the same time period, changes are not applied until the next time period. Time periods run from midnight to midnight.

### **TIPS**

- Use the search function to find projectors you want to add to your schedule. For more information on using the search function, see *Using the search function* on page 18.
- Use the group function to create a group of projectors, and then apply your schedule to that group. For more information on creating groups, see *Creating, editing, and deleting groups of inventory items* on page 57.

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### ■ To add a projector or group of projectors to the power management schedule

1. Click **System Manager**.

The *System Manager* window appears.

2. Click **Control Systems**.

The *Control Systems* dialog box appears.

3. Select the check box next to the projector you want to add to your schedule.

4. Click **Enable**.

The projector's *Scheduled standby* status changes to *Enabled*.

### ■ To remove a projector or group of projectors from the power management schedule

1. Click **System Manager**.

The *System Manager* window appears.

2. Click **Control Systems**.

The *Control Systems* dialog box appears.

3. Clear the check box next to the projector you want to remove from your schedule.

4. Click **Disable Schedule**.

The selected projector is removed from your schedule.

## Configuring projector bulb warning notifications

The *Notifications* tab enables you to configure SMART Vantage software to automatically send an e-mail warning you when projectors in your inventory have reached a bulb life status notification threshold (see *Enabling e-mail notifications* on page 64).

You can use the manufacturer's default bulb warning notification threshold values or assign your own.

### **IMPORTANT**

- Always reset the Lamp Hours value in your projector after you replace a bulb, because SMART Vantage software uses a projector's Lamp Hours value to generate caution and warning notifications. For information on resetting the lamp hour counter in a projector, see the SMART Board interactive whiteboard system user's guide for your projector.

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- SMART Vantage software does not detect whether your projectors operate in standard or Economy mode. The default bulb warning notification threshold values used in reports are based on standard mode. If your institution's projectors are configured to operate in economy mode, consult the SMART Board interactive whiteboard system user's guide for your projector for information on threshold values for projectors operating in Economy mode.

#### NOTES

The bulb warning notification threshold values you assign determine the bulb status displayed in reports.

You can select to display the following bulb status icons in reports:

Icon	Status	Description
	Warning	Replace bulb immediately
	Caution	Replace bulb soon
	Normal	No action required

#### Assigning bulb warning notification values

SMART Vantage software has a default set of bulb warning notification values. You can use these values to determine the life expectancy of bulbs in your inventory. However, you can also use the following procedure to configure your own bulb life expectancy notification threshold values for projectors in your inventory.

#### NOTE

These values are used to determine the projector bulb life status displayed in reports.

#### To set a projector bulb notification value

1. Click **Settings**.  
The *Settings* window appears.
2. Click the **Notifications** tab.  
The *Notifications* dialog box appears.
3. Scroll to the *Notifications values* section.
4. Select a projector from the list.
5. Type a value in the *Alert* and *Warning* hours boxes.

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6. Repeat steps 4 and 5 for each projector bulb you want to set notification values for.
7. Click **Save Changes**.

### Enabling e-mail notifications

Follow the instructions below to enable email notifications containing information on the status of projector bulb life expectancies.

#### To enable e-mail notifications

1. Click **Settings**.  
The *Settings* window appears.
2. Click **Notifications** tab.  
The *Notifications* dialog box appears.
3. Scroll to the *Autodiscovery* section, and then select **Enable E-mail Notifications**.
4. Type the notification report recipient's e-mail address in the **E-mail Address** box.
5. Click **Save Changes**.

### Enabling autodiscovery

You can use the autodiscovery feature to enable SMART Vantage software to continue acquiring interactive whiteboard usage when different computers are used to connect the same interactive whiteboard to your network.

SMART Vantage software uses the IP address of the computer connecting an interactive whiteboard to your network to identify and obtain usage data. If the autodiscovery feature is disabled and the IP address of a connecting computer changes, the connection between SMART Vantage software and the interactive whiteboard is lost. No further usage data will be recorded.

#### EXAMPLE

A system administrator uses his or her laptop to connect an interactive whiteboard to your network. The interactive whiteboard is added to the SMART Vantage inventory using the system administrator's computer's IP address and begins sending usage data to your SMART Vantage software. The system administrator then disconnects their laptop from the interactive whiteboard and connects a different computer with a different IP address.

If autodiscovery is enabled, SMART Vantage software detects the new computer and determines that the interactive whiteboard was previously added as an inventory item and establishes a connection to the interactive whiteboard. SMART Vantage software begins acquiring usage data.

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### IMPORTANT

SMART Product Drivers and SMART Vantage enabler software must be installed on the computer used to connect an interactive whiteboard to your network. For more information, see the *SMART Vantage Installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).

#### To enable autodiscovery

1. Click **Settings**.  
The *Settings* window appears.
2. Click the *Customize* tab.
3. Scroll down to the *Autodiscovery* section.
4. Select the **Autodiscovery** check box.
5. Select **Continuous**, **Hourly**, **Daily** or **Weekly** from the *Autodiscovery Interval* drop-down list.

### TIP

The *Autodiscovery Interval* drop-down list enables you to select how often SMART Vantage software polls your network for connected interactive whiteboards. This feature is useful when you want to limit the volume of network traffic generated by SMART Vantage software.

6. Click **Save Changes**.

#### To disable autodiscovery

1. Click **Settings**.  
The *Settings* window appears.
2. Click the *Customize* tab.
3. Scroll to the *Autodiscovery* section.
4. Clear the **Autodiscovery** check box.
5. Click **Save Changes**.

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### Editing and deleting inventory items

You can use the *Systems Manager* tab to edit or delete SMART Board interactive whiteboard or projector listings from your SMART Vantage software inventory.

#### ■ To edit an inventory item

1. Click **System Manager**.  
The *System Manager* window appears.
2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.
3. Select an inventory item, and then click **Edit**.  
The system information window appears.
4. Edit the details of the institution.
5. Click **Save Changes**.

#### ■ To delete an inventory item





1. Click **System Manager**.  
The *System Manager* window appears.
2. Click the **Manage Inventory** tab.  
The *Manage Inventory* dialog box appears.
3. Select an inventory item, and then click **Delete**.  
A message appears asking you to confirm that you want to remove the item from the list.
4. Click **Yes**.

### Checking the connection of an inventory item

You can check the connection status of your inventory items to SMART Vantage software from the *Manage Inventory* tab in the System Manager screen.

The symbol in the *Status* column next to each inventory listing indicates the connection status of the interactive whiteboard or projector.

This table provides a description of what each connection status symbol means.

Symbol	SMART Vantage software connection status
	Connected to all of the devices associated with this inventory listing
	Not connected to any device associated with this inventory listing
	Connected to one of the devices associated with this inventory listing <div data-bbox="516 617 623 653" data-label="Section-Header"><b>TIP</b></div> <div data-bbox="516 674 1463 774" data-label="Text"> <p>Hover your cursor over the status symbol of an inventory listing that contains both an interactive whiteboard and a projector to see the connection status of each device.</p> </div>
	Attempting to connect to the devices associated with this inventory listing

**i NOTE**

SMART Vantage software keeps attempting to connect to an interactive whiteboard or projector at approximately 15 minute intervals.

## Manually controlling the power status of projectors

The *Control System tab* includes buttons that enable you to manually turn on projectors in your inventory list or place them in Standby mode. You can also select multiple projectors or a group containing projectors, and then turn them all on or place them all in Standby mode simultaneously.

**👉 IMPORTANT**

- SMART Vantage software does not update the power status of projectors in your inventory in real time. The indicated power status of your projectors in the *Manage Inventory tab* is updated each time SMART Vantage software polls your network. For more information, see *About time delay considerations* on page 13.
- Projectors can be manually turned on from Standby mode only.

**💡 TIP**

Use the search function to find a projector or the group drop-down list to find groups you created that contain projectors. For more information on creating groups, see *Creating, editing, and deleting groups of inventory items* on page 57.

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### ■ To manually turn on a projector

1. Click **System Manager**.

The *System Manager* window appears.

2. Click the **Control Systems** tab.

The *Control Systems* dialog box appears.

3. Select the check box next to the projector you want to turn on.

#### **IMPORTANT**

If you try to turn on a projector while it is in the process of going into Standby mode, the projector ignores your command. You must send the command again for it to be applied.

4. Click **Power On**.

The selected projector turns on.

### ■ To manually place a projector in Standby mode

1. Click **System Manager**.

The *System Manager* window appears.

2. Click the **Control Systems** tab.

The *Control Systems* dialog box appears.

3. Select the check box next to the projector you want to place in Standby mode.

4. Click **Standby**.

The selected projector is placed in Standby mode.

## Configuring and managing a SMART Vantage Enterprise software implementation

This section explains the set-up procedures you must complete before obtaining usage data from SMART Board interactive whiteboards and projector bulb life status from schools or institutions that have implemented SMART Vantage software.



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#### IMPORTANT

SMART Vantage Enterprise software must be installed on a server with Internet access, and be configured and activated before you can start the procedures in this chapter.

#### TIPS

- For information on installing SMART Vantage Enterprise software, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).
- For information on logging onto and navigating the SMART Vantage Enterprise administrator interface, see *Logging onto the user interface* on page 8 and *SMART Vantage Enterprise software* on page 12.

You begin configuring your SMART Vantage Enterprise software implementation by doing the following:

1. Adding schools or institutions that have implemented SMART Vantage software to your inventory list (see *Adding an institution to your inventory* below and *Importing and exporting inventory lists* on page 71)
2. Customizing the default report time frame, which sets the default filter data used in reports (see *Customizing the default reporting schedule* on page 73)

Manage your SMART Vantage Enterprise software implementation by doing the following:

- Editing and deleting inventory item details (see *Editing and deleting institution listings* on page 73)
- Checking a school or institution's connection status to SMART Vantage Enterprise software (see *Checking the connection of an inventory item* on page 74)

### Adding an institution to your inventory

The *Manage Institutions* dialog box enables you to add an institution to your SMART Vantage Enterprise software inventory list.

#### IMPORTANT

The institutions you add must have SMART Vantage software installed and configured on their institution's server.

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#### TIP

Before you add an institution to your inventory, ensure that you have the following information about the institution's server hosting SMART Vantage software:

- The fully qualified host name or IP address of the server
- The server's port number (by default SMART Vantage institution software uses port number 80)

#### To add an institution



1. Click **Institution Manager**.

The *Manage Institutions* dialog box appears.

2. Click **Add Institution**.

The institution information window appears.

3. Type the following information in the appropriate boxes:

Text box	Information
<i>Name</i>	A name for the institution  <b>TIP</b> The name you choose will be used to identify the institution in your inventory list.
<i>Host/IP address</i>	The host or IP address of the server hosting an institution's installation of SMART Vantage software
<i>Port</i>	The port number assigned to the institution's server hosting SMART Vantage software  <b>TIP</b> The default/recommended port number is 80.

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### 4. Click **Test Connection**.

When you click on the **Test Connection** button, SMART Vantage Enterprise attempts to connect to the institution server hosting SMART Vantage software.

- If the connection is successful, a message appears confirming the connection.
- If the connection is unsuccessful, a message appears prompting you to check the Host/IP address and port number.

#### **NOTE**

If you don't click the **Test Connection** button before you save, SMART Vantage Enterprise software keeps attempting to connect to the institution approximately every 15 minutes.

### 5. Click **Save Changes**.

## Importing and exporting inventory lists

You can add multiple institutions to the list of institutions SMART Vantage Enterprise software is managing, by importing a CSV file containing details of the institutions.

You can also export a CSV file containing details of the institutions in your SMART Vantage institution inventory.

#### **TIP**

You can import a CSV file containing details of your SMART Vantage Enterprise inventory at a later time, for example, when you complete a new installation of SMART Vantage Enterprise software.

### **To create a CSV file of institutions**

1. Use a database or spreadsheet program to create a document containing the column headings listed below. Refer to your software's Help system or user's guide for more information.

#### **TIP**

Use the *To export a CSV file containing inventory items* procedure on page 71 to obtain a template of the spreadsheet to identify which column headings to include. This procedure can be used even if you haven't added any institutions to your SMART Vantage Enterprise software inventory.

Column name	Type	Description
Name	String	The name of the institution

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Column name	Type	Description
Host/IP address	String	The fully qualified host name or IP address of the server hosting SMART Vantage software
Port	String	The port number of the the server hosting SMART Vantage software

2. Add details of your institution to the spreadsheet or database.
3. Save the database or spreadsheet as a CSV file.

### ■ To import a CSV file containing inventory items

1. Click **Institution Manager**.  
The *Manage Institutions* page appears.
2. Click **Import Institutions**.  
The *Import Institutions* page appears.
3. Click **Browse**.  
The *Choose File to Upload* dialog box appears.
4. Browse to and select the CSV file.
5. Click **Open**.
6. Click **Submit**.

A dialog box appears confirming how many institutions were added to your inventory.

#### NOTE

Institutions already listed in your inventory aren't added again.

### ■ To export a CSV file containing inventory items

1. Click **Institution Manager**.  
The *Manage Institutions* page appears.
2. Click **Export Institutions**.  
The *File Download* dialog box appears.
3. Click **Save**.
4. Browse to a folder, type a name for the file, and then click **Save**.

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### Customizing the default reporting schedule

The default reporting schedule determines the time frame over which your institution's interactive whiteboard and projector usage data appears in your reports. For more information on generating reports, see *Generating SMART Vantage Enterprise reports* on page 31.

You can customize the default reporting schedule by using the following procedure.

#### ■ To customize the default reporting schedule

1. Click **Settings**.  
The *Customize* screen appears.
2. Scroll to the *Default report time frame* section.
3. Select the **Days** check boxes for the days on which you want usage data to appear in your reports.
4. Click in the **Start time** box and scroll to select a start time.
5. Click in the **End time** box and scroll to select an end time.
6. Click **Save Changes**.

### Editing and deleting institution listings

You can use the Institution Manager window to edit or delete an institution in your inventory.

#### ■ To edit an institution

1. Click **Institution Manager**.  
The *Manage Institutions* dialog box appears.
2. Select an institution, and then click **Edit**.  
The institution information window appears.
3. Edit the details of the institution.
4. Click **Save Changes**.

#### ■ To delete an institution from your inventory

1. Click **Institution Manager**.  
The *Manage Institutions* dialog box appears.

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2. Select an institution, and then click **Delete**.

A message appears asking you to confirm that you want to remove the institution from the list

3. Click **Yes**.





The selected institution is removed from the inventory list.

### Checking the connection of an inventory item

You can check the connection status of the institutions listed in your SMART Vantage Enterprise software inventory from the Institution Manager screen.

The symbol in the *Status* column next to each inventory listing indicates the connection status of the institution.

This table provides a description of what each connection status symbol means.

Symbol	SMART Vantage Enterprise software connection status
	<p>Connected to the institution associated with this inventory listing</p> <p> <b>TIP</b></p> <p>You can hover your cursor over an institution's status symbol to check the connection status of interactive whiteboards and projectors related to this institution.</p>
	<p>Not connected to the institution associated with this inventory listing</p> <p> <b>NOTE</b></p> <p>SMART Vantage Enterprise software keeps attempting to connect to an institution at approximately 15 minute intervals.</p>

# Chapter 5

## Troubleshooting

### IMPORTANT

This troubleshooting section is intended for IT administrators and others experienced with customizing, deploying and administering Windex® software in a networked environment.

### TIP


Visit the [SMART Vantage support page](#) to access more troubleshooting articles and information.

## Before you begin

Before you begin troubleshooting a SMART Vantage or SMART Vantage Enterprise software installation, ensure the following:

- The server hosting SMART Vantage software is using the Windows Server® 2008 R2 operating system with the latest updates.
- No other software is running on the server that uses port 80, such as IIS, WAMP, Apache™ web server.
- The required port numbers are open and aren't blocked by a firewall or other network items. For more information, see the *SMART Vantage installation guide* ([smarttech.com/kb/170154](http://smarttech.com/kb/170154)).
- You're logged on as a local administrator.
- The language of the server hosting SMART Vantage software is set to U.S. English, which is the only language currently supported.

## Troubleshooting information

Issue	Cause	Solution
<p>In Windows Server 2008, you're unable to select a start date or end date from the calendars in the <i>Select report</i> options section of a new report.</p>	<p>The default security restrictions of Internet Explorer 8 on Windows Server 2008 and 2008 R2 interfere with certain SMART Vantage scripting operations.</p>	<p>A possible solution is to disable Internet Explorer Enhanced Security Configuration. To do this, open Server Manager. Under <i>Security Information</i>, click <b>Configure IE ESC</b>. You can disable it for either users or administrators.</p> <p>Add the localhost IP address and "about:blank" to the list of trusted sites for your browser.</p> <p>If you're generating reports using a computer with Windows XP operating system, update your browser to Internet Explorer 8.</p> <p>Type a start date or end date into the appropriate boxes.</p>
<p>When you attempt to log onto the SMART Vantage or SMART Vantage Enterprise a message appears stating that the user name or password is invalid.</p>	<p>You typed the incorrect user name or password.</p>	<p>Confirm that you have the correct user name and password assigned to you by your system administrator.</p> <div data-bbox="1089 1188 1471 1423" style="background-color: #f0f0f0; padding: 5px;"> <p> <b>TIP</b></p> <p>User access profiles are configured in your LDAP server which authenticates and authorizes all SMART Vantage software users.</p> </div>
<p>When you log onto the SMART Vantage or SMART Vantage Enterprise user interface, the page layout is incorrect. No inventory items are displayed and you're unable to interact with user interface controls.</p>	<p>The JavaScript is disabled on your Internet browser.</p>	<p>Enable scripting support for your Internet browser.</p>



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### Troubleshooting

<b>Issue</b>	<b>Cause</b>	<b>Solution</b>
When you attempt to log onto the SMART Vantage or SMART Vantage Enterprise user interface, the “SMART Vantage software 403 error-Access denied” error message displays.	You don't have a role assigned to your SMART Vantage user account in the LDAP server that your SMART Vantage software authenticates against.	Contact your system administrator and ensure that you have a role assigned to your SMART Vantage user account in the LDAP server that your SMART Vantage software authenticates against.
If you try to generate multiple interactive whiteboard usage reports using Internet Explorer 7 or 8 with Compatibility mode turned on, reports generated after the first report display a blank screen.	Internet Explorer Compatibility mode is on.	Turn off Compatibility mode.


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Troubleshooting

Issue	Cause	Solution
<p>You're unable to obtain interactive whiteboard usage or bulb life status data from one or more of your interactive whiteboards or projectors.</p>	<p>There's no network connection between the computer connected to the interactive whiteboard or projector and the server hosting SMART Vantage software.</p> <p>OR</p> <p>There's no network connection between the projector connected directly to your institution's network and the server hosting SMART Vantage software.</p>	<p>Restore network connectivity between the interactive whiteboard or projector and the server hosting SMART Vantage software.</p>
	<p>Either or both of the <b>SNMPAgent.exe</b> and <b>VantageService.exe</b> processes aren't running on the computer connected to an interactive whiteboard or projector.</p>	<p>Restart the computer connected to the interactive whiteboard or projector to launch the <b>SNMPAgent.exe</b> and <b>VantageService.exe</b> processes again.</p>
	<p>The <b>SNMPAgent.exe</b> and <b>VantageService.exe</b> firewall exceptions were overwritten on the computer connected to an interactive whiteboard or projector.</p>	<p>Add <b>SNMPAgent.exe</b> and <b>VantageService.exe</b> firewall exceptions to the computer connected to an interactive whiteboard or projector.</p>
	<p>The SMART Vantage enabler software BAT file that starts the <b>VantageEnabler.bat</b> file and <b>SNMPAgent.exe</b> processes on startup, isn't installed on the computer connected to an interactive whiteboard or projector that has the Education Software Installer (ESI) 2012 installed on it.</p>	<p>If the computer connected to an interactive whiteboard or projector has ESI 2012 installed on it, the SMART Vantage enabler software BAT file must be installed to ensure the <b>SNMPAgent.exe</b> and <b>VantageService.exe</b> services run on startup. For more information on installing the BAT file, see the <i>SMART Vantage Installation guide</i> (<a href="http://smarttech.com/kb/170154">smarttech.com/kb/170154</a>).</p>
<p>When you log onto the SMART Vantage or SMART Vantage Enterprise user interface, you're unable to add or modify inventory items.</p>	<p>You're logged on as a report user and not as an administrator.</p>	<p>Log on as an administrator.</p>


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### Troubleshooting

Issue	Cause	Solution
You're unable to export reports as PNG files.	SMART Vantage software doesn't export SMART Board interactive whiteboard usage or projector bulb life status data in PNG format.	Export your reports as CSV files or upgrade your browser to one of SMART Vantage software's other supported browsers.
You're unable to obtain bulb life status data from one of your institution's projectors.	The projector requires a password to access its service menus and this password hasn't been added to your SMART Vantage Institution software configuration.	Add the projector's password to your SMART Vantage institution software configuration (for more information, see <i>Adding a projector password</i> on page 59).
	The projector is turned off.	Turn on the projector.
	There is no network connection between SMART Vantage Institution software and the projector.	Restore the network connection between SMART Vantage Institution software and the projector.
	The projector's SNMP agent isn't on.	Turn on your projector's SNMP agent. <div data-bbox="1081 947 1472 1184" style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;">  <b>TIP</b>              For information on turning on your projector's SNMP agent, see the SMART Board interactive whiteboard system user guide for your projector.           </div>

## CHAPTER 5

### Troubleshooting

Issue	Cause	Solution
Your power management schedule isn't placing a projector in Standby mode.	There's no network connection between the computer connected to the projector and the server hosting SMART Vantage software. OR There's no network connection between the projector connected directly to your institution's network and the server hosting SMART Vantage software.	Restore network connectivity between the projector and the server hosting SMART Vantage institution software.
	The projector has already been placed into Standby mode once during a 24 hour time period (time periods run from midnight to midnight).	The action to place the projector in Standby mode will be applied in the next time period.
	The projector's SNMP agent isn't on.	Turn on your projector's SNMP agent.   <b>TIP</b> For information on turning on your projector's SNMP agent, see the SMART Board interactive whiteboard system user guide for your projector.



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