

# BIMCO SmartCon User guide

## Contents

BIMCO SmartCon.....	3
Definitions and terminology.....	3
BSC Account.....	3
RMS.....	3
Primary RMS user .....	3
Secondary RMS user .....	3
Company administrator(s).....	3
Colleague(s) .....	3
Guest users .....	4
Free email domains .....	4
Company domains .....	4
User role .....	4
Contract Security Group .....	4
CSG Roles .....	4
Send contract as PDF .....	4
.docx file .....	5
PDF file.....	5
Minimum requirements .....	5
Microsoft Windows .....	5
iOS.....	5
Android .....	5
Access & Installation.....	5
Microsoft Word .....	5
Access to BIMCO SmartCon.....	5
User setup confirmation.....	5
BIMCO SmartCon Word Add-in .....	5
Microsoft ® cloud services.....	6
BIMCO SmartCon Website .....	6
SmartCon basic management.....	6
Create new contract .....	6

Send contract as PDF .....	6
Document history .....	7
Event logs.....	7
Download clause .....	7
Company templates.....	7
Admin management .....	7
Users .....	7
Groups .....	8
Products.....	8
Settings .....	8
Contract editing .....	8
Autofill boxes / Mini-database .....	9
Cut and paste.....	9
Delete text .....	9
BIMCO SmartCon Add-In .....	9
Create new contract .....	10
Genuine document check.....	10
Send contract as PDF .....	10
Knowledge base.....	10
Upcoming courses .....	10
Contact us.....	10
Add a clause.....	10
Embed rider clauses .....	10
Reverse document changes.....	10
Minidatabase on/off.....	10
Logout.....	11
User info .....	11
Protect contract content .....	11
Create new CSG .....	11
Delete CGS .....	11
Add users to CSG .....	11
Remove users from CSG .....	11
Possible CSG delay.....	11
Contract Archive .....	11

Appendix 1.....	12
User invitation/creation .....	12
Appendix 2.....	14
Login to <a href="https://smartcon.bimco.org">https://smartcon.bimco.org</a> .....	14
Appendix 3.....	16
Login to “Word” or the BSC Add-in .....	16

## BIMCO SmartCon

For many years BIMCO has sought possibilities to allow anyone with interest in our contracts to get their hand on the document itself. Relying on the global widespread usage of Microsoft Word<sup>®</sup> as the editing component, BIMCO SmartCon is BIMCO’s product that provides users with a copy of the Microsoft Word<sup>®</sup> template for local editing.

In the following BIMCO SmartCon is abbreviated BSC.

## Definitions and terminology

Throughout this manual the following definitions and terminology is being used.

### BSC Account

A BSC Account is connected to a company under which Company profiles, Colleagues and Guests can be assigned rights and thereby manage the account and open protected documents of the company.

### Company Profiles

Under the BSC Account is a company profile. The company profiles are used for invoicing purposes and more can be created to allocate cost to different cost centres or departments.

### RMS

Rights Management System is in the following abbreviated RMS.

### Primary RMS user

When creating the BSC Account a “Primary RMS user” is created and assigned the account. This user profile is a Company administrator (see below) and cannot be deleted.

### Secondary RMS user

More classic RMS users are purchased in packages. These users can own/administrate Contract Security Groups. (see below)

### Company administrator(s)

These user profiles own the BSC account, Company profiles and contract security groups, document access for colleagues and guest users.

### Colleague(s)

A colleague is a normal BSC user under your BSC Account. (see below)

## Guest users

A guest user is a user outside the organisation from which the BSC account has been setup. The Guest user package allows the administrator to give temporarily access to one of your contracts, by given them a temporarily password to one of your Guest users logins. Guest users are assigned to one specific CSG and that can't be changed. A Guest user is always a limited user, this means that they can't access SmartCon at bimco.org, nor can they use the add-in. They can only amend a specific contract you share with them through email or a storage space.

## Free email domains

BIMCO SmartCon cannot work with email logins that belong to free domains such as Gmail, Hotmail etc. All Company administrators, colleagues and guests must belong to a business specific domain.

## Company domains

SmartCon keeps a list of official domains used by your company. This list is managed by BIMCO Informatique A/S.

## User role

As Company Administrator, you can grant other users the "Administrator" privilege. Granting administrator roles passes on rights to manage users. Normal users do not have this privilege. Limited users are described under Guest users.

## Contract Security Group

Group owned by a primary or secondary RMS user and containing other colleagues or guests. In the following Contract Security Group is abbreviated CSG.

## CSG Roles

The BSC system contains 3 different roles to manage contract security groups.

Owner	By default, the Company Admin is owner of all CSG groups created under the BSC account. This way the Company Admin is always able to gain access to any document created under the Company BSC account.
Power user	The CSG Owner can grant Power user privilege to a specific user for a specific CSG. This allows delegation of user management on a specific contract security group.
User	Normal user without any special privilege.

## Send contract as PDF

Send contract as PDF means to process the contract and compare it with the original template to produce a PDF file visually displaying all differences from the original. There are 2 ways of sending a contract as a PDF.

Working copy	A Working Copy is a PDF with a special watermark indicating this document is in progress of being edited and cannot be used for signature. Working copies are free of charge.
Final	A Final copy is a PDF file without any watermark. The cost of producing a Final can be found in our pricelist under "SmartCon information & available contracts.
Clause reduction	Clause reduction allows you to reduce the most standard BIMCO clauses so that only the header will show.

### .docx file

Microsoft Word ® file protected to only be opened by active users of a specific contract security group.

### PDF file

Adobe Portable Document Format ® file delivered when you send a contract as PDF.

## Minimum requirements

### Microsoft Windows

To use BIMCO SmartCon you as minimum must run fully updated Microsoft Windows ® 7, 8 or 10 and use fully updated Microsoft Word ® 2013 or 2016.

### iOS

Editing BSC contracts can also be done on iOS using the latest Word App. On iOS, you are not able to install the Add-in.

### Android

On Android devices, you should be able to open a BSC contracts, but you cannot edit it. Enabling editing is part of Microsoft's road map for the future.

## Access & Installation

### Microsoft Word

To edit BSC contracts you need to be a registered user of Microsoft Word ®. This is a prerequisite of your own or company and BIMCO Informatique A/S does not supply nor support this component as part of our system.

### Access to BIMCO SmartCon

When not editing contracts, access to BIMCO SmartCon is done via <https://www.bimco.org>. Before you can access this website, your company needs a BSC account.

You will need to register in our system to purchase BIMCO SmartCon. Once the sign-up is complete and you have received the welcome email. You can purchase the package most suitable for your company.

### User setup confirmation

Before a colleague or guest (Ref. Definitions and Terminology) can use BSC the user in question needs to be confirmed as connected to the BSC system. This confirmation requires the user to complete the "Get Started" steps from the email send to the individual.

Appendix 1 describes this process in more detail.

### BIMCO SmartCon Word Add-in

To provide easy access to the main BSC functions the BSC system includes a program that can be locally installed to show up inside Microsoft Word ®. This program is called the BSC Add-in and the link to download can be found under My Account and then SmartCon at [bimco.org](https://www.bimco.org).

## Microsoft® cloud services

Logging into BSC require that the Microsoft cloud services are running and can accept and handle your login requests.

## BIMCO SmartCon Website

After your company BIMCO SmartCon account has been setup, it is managed at [bimco.org](http://bimco.org) from My Account, under SmartCon.

BSC users can download document templates, send contracts as PDF, view document history, download BIMCO standard clauses and identify documents. When logged into the site you have 3 options.

### SmartCon basic management

In the top you can download or update the SmartCon add-in.

### Create new contract

To start using BIMCO SmartCon you download one of the contracts.

First select which contract security group that should protect the contract. The list of CSG's shown represent the CSG's that you are member of.

Secondly choose contract type by selecting one of the groups.

And third select the specific contract you want to work with.

Depending on which browser you use, you may be able to save the Word file outside the default download directory (this is determined by your local setup) during download. We suggest you avoid using these default download temporary paths for storage, but that you instead change it to a path of your choice.

Alternative when opening the file in Word – chose "Save As" to pinpoint at storage path of your choice.

After you have retrieved and saved your local copy of the contract you can open it like any other Word document. (Ref. Contract editing)

### Send contract as PDF

You are not able to print a BSC contract directly from Word. Instead we have added a "Send contract as PDF" function which can be used during contract negotiation and of course when complete. "Send contract as PDF" will produce a .pdf file where all changes between the original contract and the edited version are visible.

By clicking "Send contract as PDF" you can upload an edited document to get the PDF.

You can add:

- Document title: Name of the final contract.
- Document Keywords: Meta data added to the .pdf properties
- Document Recipient: The email address for the destination of the PDF.
- Choose "Working copy" or Final (Described further under Concepts)
- Clause preference: Whether to have the full contract in the PDF or reduce some standard BIMCO clauses to only the header.

Click "Submit" to upload the document to the compare function.

Following the generated .pdf file is being mailed to the destination email defined above.

#### Document history

Here you can access the document history in chronological order, click search to see the selection.

#### Event logs

Allows you to see all activity from the users that have used either the website or the SmartCon add-in.

#### Download clause

Here you can select any of the released BIMCO Standard Clauses. The text is being displayed and by clicking the “Mark as downloaded” the text is inserted on your local clipboard for insertion into the document being edited.

If you are the company administrator the website displays a “Company Admin” option from which you can create new users, group users and manage company security groups.

#### Company templates

You can create your own proforma and make it available for all company users. Download the SmartCon contract you want to work with and add your company standard amendments. Then upload it to company templates and you will be able to use it as your company proforma.

#### Admin management

From the “Admin management” option you administer users and contract security groups.

##### Users

From here you can edit, add and delete user accounts. Select user and “new user” to create a new user, and under “Details” of a user you manage business email address, profile and role. The rest of the fields are managed by BIMCO as part of our company and contacts databases.

- Bus. Email: Required when the UPN (User principal name) is part of the bimcosmartcon.org domain. Pls. add a valid business email for communication purposes.
- Role: Select “Limited”, “Normal” or “Administrator”. The administrator role is described under Definitions and terminology. And limited is described under “Guest users”.

##### Adding User

You can only add users that are registered staff member. In case you want to add a user not present in the list, pls. go to staff details and create the new staff member (requires “Staff Updater” role).

After having selected a new user from the list you need to select Profile and Role as describe above.

Click “Create” to add the user. Depending on the domain of the user different scenarios will occur.

In case it’s a free email domain based BSC will take of the creation and send an email with login details. The message shown is:

“This users mail-domain is not approved, and user will be created as a classic user”

In case it’s a company-based domain email the user is required to complete certain steps indicated in and email send by Microsoft on behalf of BIMCO Informatique A/S. The message shown is:

“User will receive an invitation that must be accepted. After that user will be placed in ready state”

Pls. see Appendix 1 for more information on the approval of the invitation.

### Groups

From this option you can zoom into details of the CSG and administer current and new members. You can also add guests to the CSG in question. On how to manage guests pls. see next heading.

Activate “Add new” to create a new CSG. All you must input is the name of the group. It’s good practice to name the CSG with prefix that characterise it’s use or purpose, plus maybe add an internal number sequence. For example: CHARTERING-01

Pls. observe that creating CSG’s take time. Allow some 15 minutes wait before checking whether it’s active. The steps are “Queued”, “InProgress” and finally no special indication when the CSG is active. You may monitor the stages by refreshing your browser.

For active CSG’s you must set the expiry date. This setting defaults to Dec 31, 2099 but can be changed from the calendar selector. Pls. be aware, that if you change the expiry date an CSG already in use, the new expiry date will only apply to documents downloaded or re-secured after the change.

You can view existing members, add new members or guests to the CSG. (See below)

### Products

From “Products” you can add users and guest users. First select the profile you want to add more to.

Secondly choose whether you want to purchase more company users or a guest package. Select the amount and go to shop to get an invoice or pay directly for the requested additions.

### Settings

From “Settings” you can choose whether you want us to store the Word file of your contracts next to the PDF when sending “Working copies” or “Finals”

## Contract editing

Editing a BSC .docx document is done using your local version of Microsoft Word<sup>®</sup>. During both opening and editing a BSC document Microsoft Word controls the security of the document hence you will be requested to login when starting the process. Depending on whether you already use Microsoft Cloud services such as Microsoft Office 365, you may already be logged in and thereby not be prompted to provide your credentials. In case you are prompted the credentials used when logging “into Word” must be the same you BSC user.

Pls. see Appendix 3 for a full description on how to login to use a BSC document.

During document editing you will notice that Microsoft Word “Track Changes” (Found under the Review ribbon option) is enforced. This enables you to pass on the document to other stakeholders and at the same time visualise yours and their changes during the editing process.

In above example deletions are shown by overstrike and insertions underlined in red. (Like the default colours used when finalising documents)

In general, the BSC system does not place any constraints on the editing capabilities in Word. However, there are a few BSC design and product assumptions. These are:



- Headers and Footers: During editing the BSC contract does not prevent you from changing these, but beware that during “Send contract as PDF” the original Header and Footer text will be reinstated removing any changed you have made in these areas.
- Insert pictures: During editing the BSC contract you can insert pictures. However, please beware that you cannot change the layout option for picture overlay. In case “Send contract as PDF” meets such a contract an error is thrown.
- Formatting of a contract such as fonts and paragraph.

### Autofill boxes / Mini-database

If you are using the BSC Add-in and you are logged in, you can be assisted by the “Autofill boxes” feature. The information needs to be updated and maintained at bimco.org. To activate click the small arrow next to “Choose an item” in ex. the “Shipbroker” or “Vessel’s name” box.

Behind this feature is a mini-database which you control.

For example, if you select a ship that is entered at bimco.org, BSC will find the other details of that vessel and populate the other relevant boxes (such a flag, DWT, etc.).

Since checking these data can require something of your internet connection, you enable/disable this feature in the SmartCon add-in.

### Cut and paste

During editing you can insert and pictures etc. from the outside, i.e. paste into the BSC contract via your local clipboard, but not the other way around. From inside a BSC contract you cannot copy or export data.

### Delete text

You can delete text and paragraphs as you please. As mentioned, “Track Changes” are enabled hence your deletions will be shown during editing depending on how your “Review” - “Markup” settings are. Similar deletions by design appear in blue strikethrough text when using “Send contract as PDF”.

### BIMCO SmartCon Add-In

Together with BSC we supply an Add-in to Word (Pls. note this is only available on the Windows platform). After installing it (Ref. Access & Installation) the BSC add-in becomes available under the “Add-ins” option of word. Select “Reload SmartCon pane” to open.

To use the BIMCO Add-in you must login to BSC using same credentials as used when creating your BSC user. After a successful login the BSC Add-in, the BIMCO SmartCon add-in expands providing you with BSC functions directly from within Word.

How to login to use the BSC Add-in is described in more detail in Appendix 3.

When expanded the BSC Add-in provides you with access the BSC System without leaving Word.

### Create new contract

If you want to obtain a fresh copy of one of the contracts click “Create new contract”. Before download select “Contract Security Group”, “Contract Type” and finally “Contract”. Choose which folder the template should be saved to including filename of same.

### Genuine document check

- Identify Current document – allows you to check the currently open document
- Identify Other document – allows you to check another document your computer or email.

### Send contract as PDF

Same function as described under “SmartCon basic management”.

### Knowledge base

Is also known as SmartCon Plus and it is premium version of SmartCon. You will have immediate access to essential learning material, recent cases and expert interviews etc. - all contract-specific and built into the Word document. This powerful tool will assist you to better understand contractual principles and avoid pitfalls during negotiations.

### Upcoming courses

This is a list of upcoming courses that are relevant to the currently open contract.

### Contact us

Allows you to send an email to one of the following departments:

- Technical issue to [smartcon@bimco.org](mailto:smartcon@bimco.org)
- Commercial advice for members to [advice@bimco.org](mailto:advice@bimco.org) (this is for BIMCO members only)
- Knowledge base and courses to [training@bimco.org](mailto:training@bimco.org) (SmartCon Plus)

### Add a clause

Same function as described under “SmartCon basic management”.

### Embed rider clauses

Here you can add your rider clauses as additional clauses to the contract.

Select the clause file you want to add, and the output name of the file and press “Add clauses”.

This will give you a new document with your additional clauses in black as part of your contract. Should you start to negotiate/change them, it will show with track changes.

### Reverse document changes

If you have deleted some text in a contract and you want to get it back to the original, you can select the text, press the box with the “...” select a place and file name, and press “Reverse changes in document selection”. This will give you a new document where you have “rejected” the changes in your selection.

Please note that you need to check you contract afterwards, because the reverse might expand to a whole section since it depends on how you deleted the text in first place.

### Minidatabase on/off

Since checking these data can require something of your internet connection, you enable/disable this feature in the SmartCon add-in.

## Logout

Logs you out from the Add-in. This will only disconnect the Add-in and not affect the document you may be editing.

## User info

Shows BIMCO customer number and registered email for the current user.

## Protect contract content

All BSC contracts are protected by contract security groups (CSG's). As described above, you manage CSG's from My account under SmartCon and SmartCon CSG membership management. In the following we describe the rules that apply for users of CSG's.

It's important to understand that the BSC system only manage the content of the BSC contracts and that you solely manage any distribution and storage of BSC contracts (the .docx files). By providing you access to the .docx file you reign where you save it and who you distribute it to. Beware that this includes all copies of it. When copying a BSC contract the copy of the contract inherit the security settings of the original hence it is born with same security settings as the parent.

## Create new CSG

To provide granular access to BSC contracts you create as more CSG's if required.

## Delete CGS

By deleting a contract security group, you revoke access to all contracts secured by that CSG.

## Add users to CSG

By adding a user to a contract security group, the user obtain access to any contract created under the CSG in question. That includes all former and future contracts if, the individual remains a member of the CSG.

## Remove users from CSG

Deleting a contract security group corresponds to deleting all users from the CSG and it will revoke access to any contract created under that CSG.

## Possible CSG delay

Pls. observe possible delay in which any of the above CSG changes is being executed. There are 2 types of delay. A general delay concerning changing security groups.

On top, when removing users or group all users will enjoy access for 24 hours offline setup by the BSC system.

## Contract Archive

By design you decide where to store your contracts, both .docx and .pdf files. If you company have policies for archiving signed contracts you can easily comply with those rules for keeping your BSC documents.

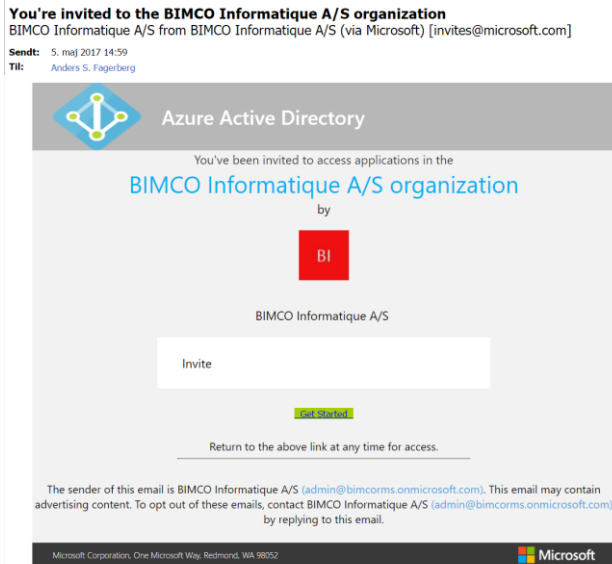
Pls. note that you have access to you .docx files if your company has an active BSC account with BIMCO Informatique A/S and you are in the contract security group covering securing the in question.

Security re. the .pdf's is different. Anyone in possession of these files can open and read them.

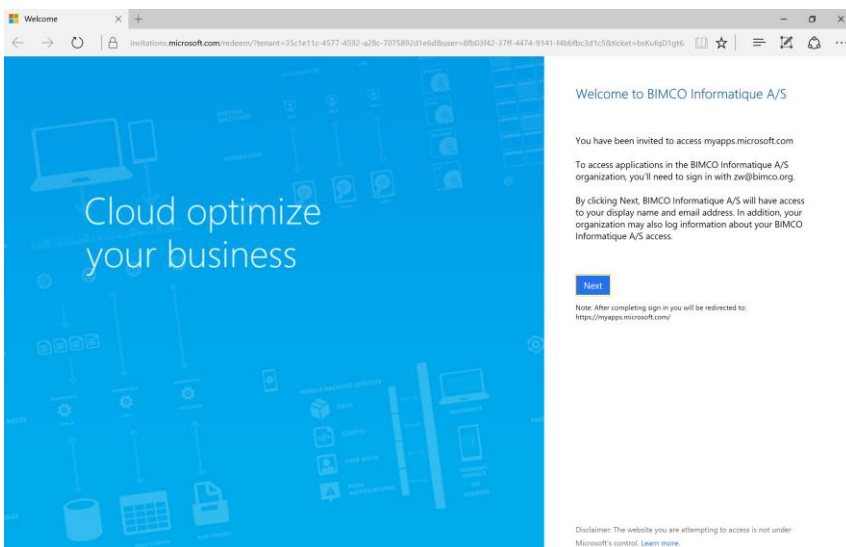
## Appendix 1

### User invitation/creation

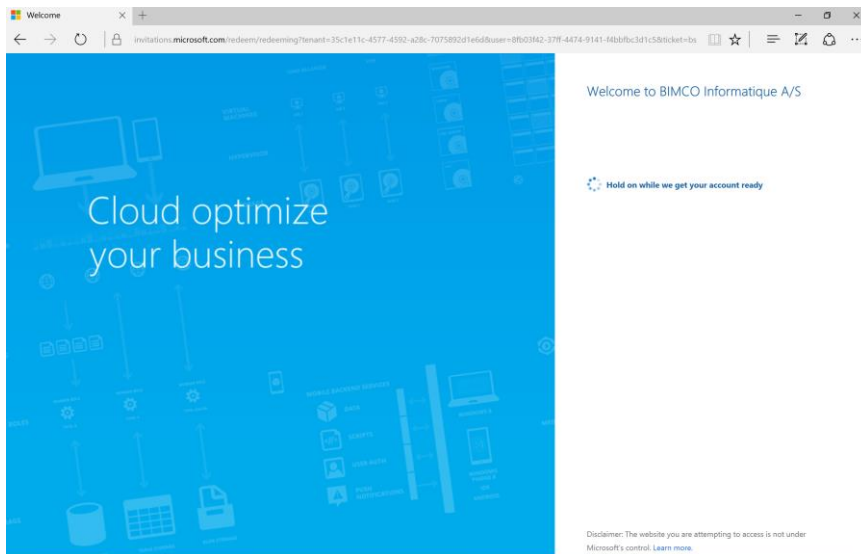
Following the addition of a new user below email is sent to the user email address.



By following the “Get Started” link you are taken to the following Microsoft page.



Here you press “Next” and follow the 1 or more steps to complete the invitation.



When done you are sent to <https://smartcon.bimco.org> where you will prompt to login.

If you don't complete above steps and you cannot login user account 15 minutes after it's been created repeat the steps and in case it's still failing, contact support.

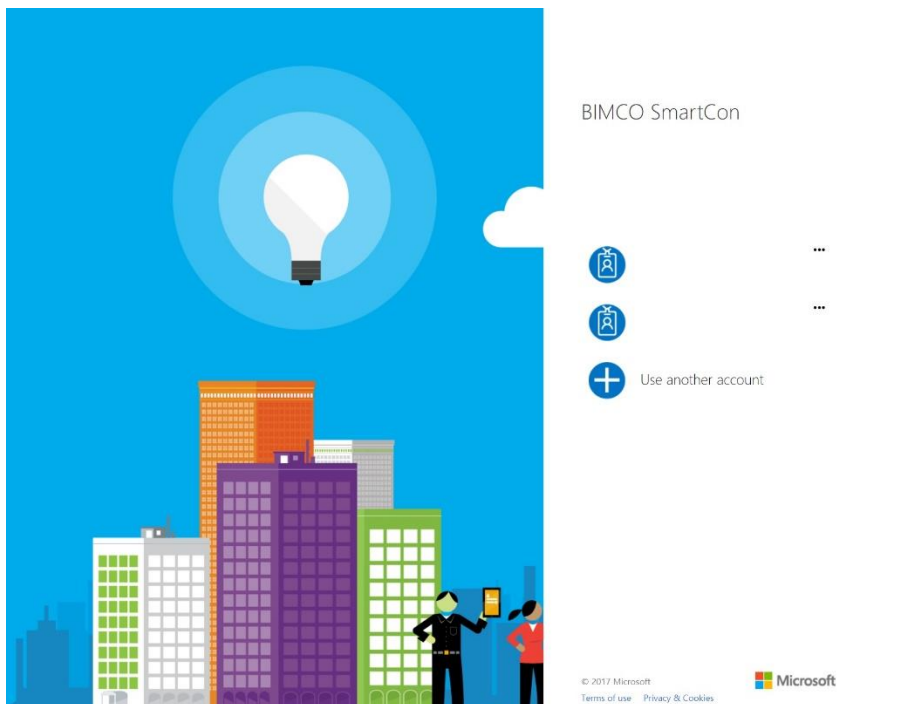
## Appendix 2

### Login to <https://smartcon.bimco.org>

When you use the BSC system you are prompted to login.

The login page is hosted in the Microsoft Cloud hence you are directed to <https://login.microsoftonline.com>. From this page, you first select the right login context. I.e. You specify the email address that was setup by your company administrator.

In case you are the initial company administrator you can also login using the Primary User setup by BIMCO Informatique A/S.



When prompted you always must select “Work of School account”. “Personal account” will not work.



## BIMCO SmartCon

It looks like **BIMCO SmartCon** is used with more than one account. Which account do you want to use?



Work or school account  
Created by your IT department



Personal account  
Created by you

[Back](#)

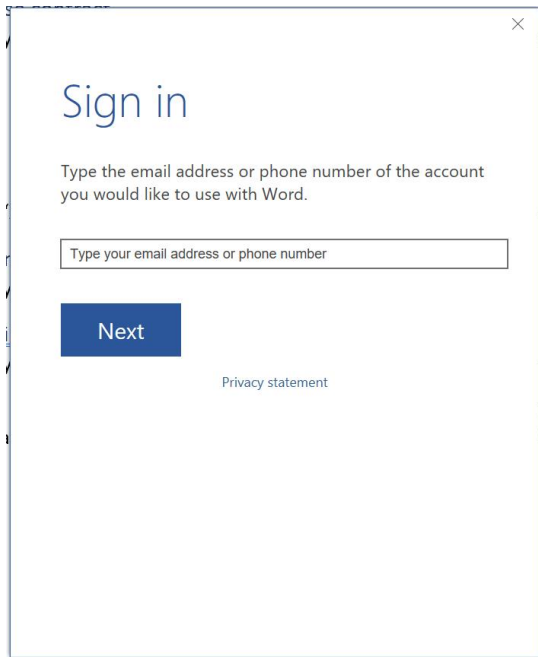
Tired of seeing this? [Rename your personal Microsoft account.](#)

## Appendix 3

### Login to “Word” or the BSC Add-in

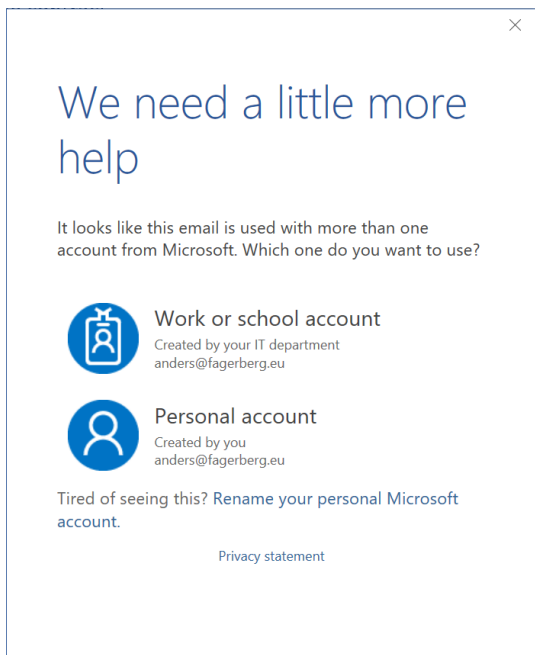
The first time a new user tries to open a SmartCon contract one must first sign out of Word and close their Office products (in some cases all Microsoft products that have the same login).

When opening a BSC contract or login to the BSC Add-in you are prompted to sign in Word will present the following login prompt. Pls. be aware this is a Microsoft login and not managed by the BSC system. The email you have to enter is the same you use when setting up your BSC user.



A screenshot of the Microsoft Word 'Sign in' dialog box. The title 'Sign in' is at the top. Below it, the text says 'Type the email address or phone number of the account you would like to use with Word.' There is a text input field with the placeholder 'Type your email address or phone number'. Below the input field is a blue 'Next' button. At the bottom, there is a link for 'Privacy statement'.

Click next and make sure to choose “Work or school account”. BSC does not work with “Personal accounts”

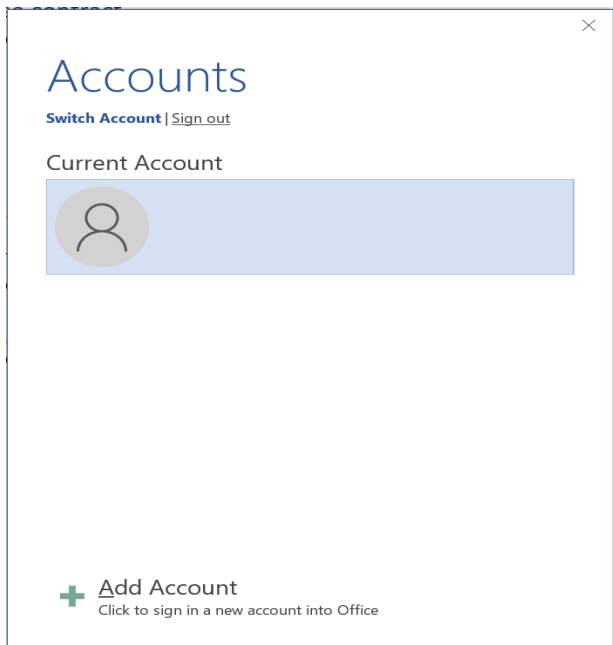


A screenshot of the Microsoft account selection dialog box. The title 'We need a little more help' is at the top. Below it, the text says 'It looks like this email is used with more than one account from Microsoft. Which one do you want to use?'. There are two options: 'Work or school account' with a blue icon of a person and a key, and 'Personal account' with a blue icon of a person. Both options show 'Created by your IT department' and 'anders@fagerberg.eu'. At the bottom, there is a link for 'Privacy statement'.



Depending on whether you are using the right user (email) the document will open in Word as normal. In case it does not you may have to select the right account as you can have more profiles with Microsoft.

Select an account, switch account or sign out depending on how many Microsoft accounts your company or which context your login.



Example of new login prompt (again always choose Work or School account)

