Kansas
AD ASTRA PER ASPERA
Department of Administration

SMART *Web*
Statewide Management, Accounting & Reporting Tool

How to use the SMART *Web* website

Last Updated – 08/22/2013

Learning Objectives

In this presentation our aim is to show you how to best use the **SMART *Web*** website:

* Navigation
* Content Organization
* SMART Training Materials Overview
* Performance Support Materials

SMART *Web*
Statewide Management, Accounting & Reporting Tool

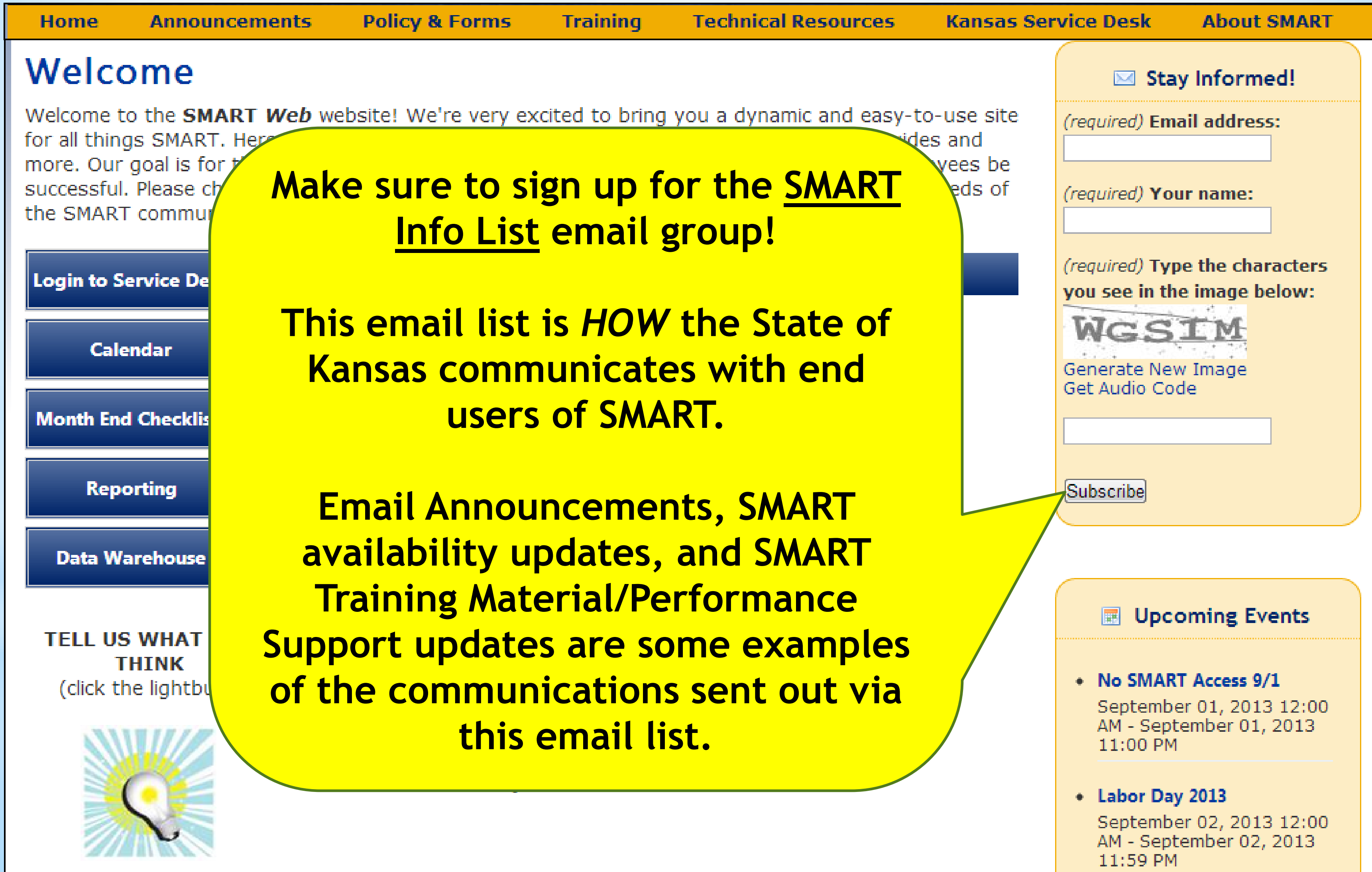
SMART *Web* – Info Website

URL: https://smartweb.ks.gov

* The **SMART *Web*** website is the State of Kansas informational website for SMART
* It is your **one stop shop** for all things SMART!

SMART *Web* – Home Page

SMART *Web* – Stay Informed!

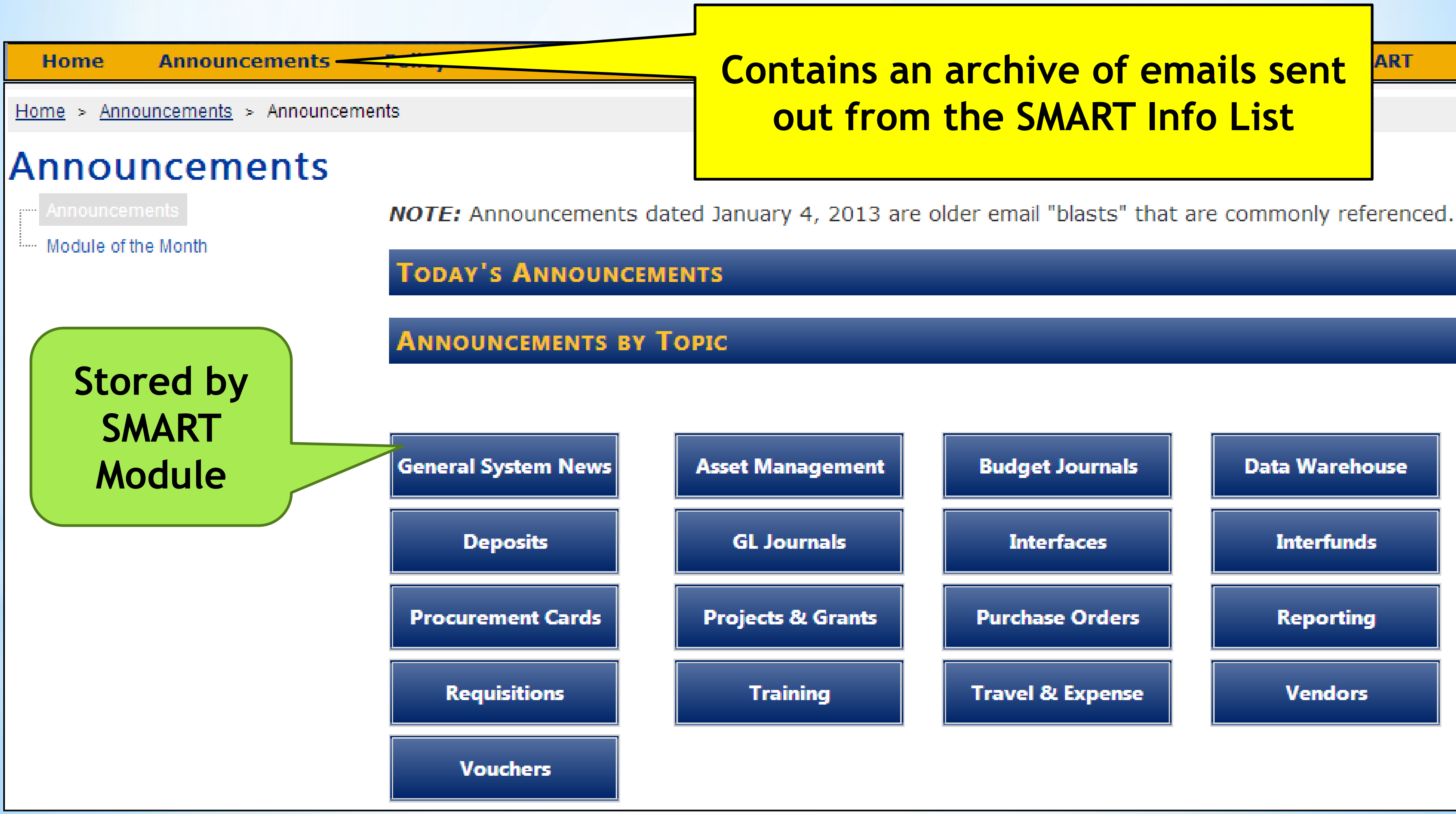


Make sure to sign up for the SMART Info List email group!

This email list is *HOW* the State of Kansas communicates with end users of SMART.

Email Announcements, SMART availability updates, and SMART Training Material/Performance Support updates are some examples of the communications sent out via this email list.

SMART *Web* – Announcements



SMART *Web* - MoM (Module of the Month)

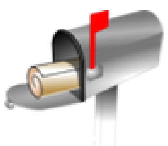
Home | Announcements | Policy & Forms | Training | Technical Resources | Kansas Service Desk | About SMART

Home > Announcements > Module of the Month

Each month one of our SME's (Subject Matter Experts) writes an in-depth article about their module.

Module of the Month

- Announcements
  - Module of the Month



Email Us!
We want to hear from you - Send us your questions or suggestions concerning the Module of the Month.

Click the mailbox above to send us an email at smartmom@da.ks.gov

How It Works

The Module of the Month is a section o
information concerning the modules th

Each month we will feature a module and ... help
make your SMART processing go more smoothly.

This Month's Module Is...

General Ledger

General Ledger is the SMART module that keeps a record of all accounting entries system-wide. In addition to allowing users to create journal entries directly online, this module also automatically retrieves accounting data from all other SMART modules via batch processing from expenditures to revenue collection.

The General Ledger stores the data that provides important information such as fund balances, expenditure reports and Actuals ledger transaction detail.

Click the button below to get started:

General Ledger

SMART *Web* – Policy & Forms

Home | Announcements | Policy & Forms | Training | Technical Resources | Kansas Service Desk

Home > Policy & Forms > Policies & Procedures

Policies & Procedures

- Policies & Procedures
- Circulars
- Accounting Forms
- Security Access Forms

Frequently used links

Important Links

The following links contai olicy and procedure information specific to SMART:

- SMART Policy Manual
- Office of General Services
- ffice of Business Process Improvement - Procurement
- of the Budget
- Offi an Resources
- Office o n Technology Services
- State of Ka

Security Access Forms to set up new users in SMART

SMART Security Access Forms

The following files are the SMART Security
Submit the completed forms to change ac
and removing roles to an employee, provi
employees no longer with your agency or

- Security Liaison Training Guide
  PDF, 624.70 KB

Frequently Used Accounting Forms

SMART Ready Forms

Accounting Forms (Click here for Payroll forms)

Form #	Form Name	File Format
AM-001	InterUnit Transfer	pdf XLSX
DA-6 (rev 05-13)	Lost Check Statement - No changes needed to be made to the replacement check.	XLSX

SMART *Web* – Technical Resources

<u>Interfaces</u> – Give agencies the ability to 'upload' files into SMART

<u>Bundles & Upgrades</u> – Pertains to PeopleSoft software updates

<u>Compatibility</u> – Provides documentation regarding supported internet browsers that are compatible with SMART and SHaRP. Troubleshooting guide for agencies. Authored by OITS – The Office of Information and Technology Services

SMART *Web* – Kansas Service Desk

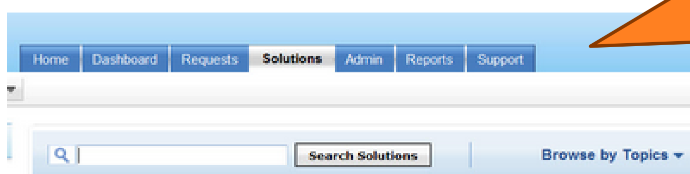
Generating Requests

Got a question?
Need a problem resolved?
Want to request a new service or enhancement?
If you are a Registered Service Desk Contact for your agency then you have access!
Click on the Kansas Service Desk image below to get started:

Open a Service Desk Request (if applicable)

Solutions Available!

Finding a solution is easy and anyone can do it! **Click on the Solutions image b**



Search the Solutions knowledge database for resolutions to common issues in SMART

Forgotten Passwords

Resetting a forgotten password is easy! Click on the "**Forgot Your Password**" link on the log in screen of Employee Self Service, SHaRP, or SMART.

Reset your own password

Kansas Service Desk Hours of Operation:

8:00 a.m. to 5:00 p.m.
Monday through Friday, except Holidays

Contact us at
785-368-8000 and Select Option 2 for SMART

Service Desk Hours

SMART *Web* – About SMART

Home | Announcements | Policy & Forms | Training | Technical Resources | Kansas Service Desk | About SMART

Home > About SMART > Overview

System Overview

- Overview
- Module Design
- SMART Implementation

Overview
Includes Purpose and History of SMART

SMART Implementation
Links to original Sunflower project - SMART Implementation Information (Historical data)

Purpose

SMART was implemented on July 1, 2010 as the State of Kansas central financial management system.

The goal is to improve efficiency, management decision-making, transparency and customer service for state agencies.

History

The history of SMART began with a Needs Assessment conducted in 2006 to review the existing financial management systems and processes throughout State government and to identify agency-specific administrative system requirements that were not being met at a central level. This study evaluated the feasibility, costs and benefits of implementing a new statewide financial management system.

In 2007, with the endorsement of Governor Kathleen Sebelius, a 2-year project was initiated to acquire, design, test and implement a new system under the direction of the Department of Administration.

Oracle's PeopleSoft was the software program selected as the State's new system. In total, 9 major functional areas were implemented in a big-bang approach, including the Time and Labor module in the SHARP payroll system and 60 agency systems were able to be decommissioned:

- Purchasing
- Accounts Payable
- Asset Management
- Projects / Grants
- Accounts Receivable / Billing
- General Ledger
- Data Warehouse & Reporting
- Time and Labor
- Travel and Expense

SMART *Web* - Training - New Users

Rolling over the top gold navigation bar options, prompts drop down menus to display

New users start their SMART training on this page

The left menu shows how the Training information is organized and stored

SMART *Web* – Training Materials

Home > Training > SMART Training Materials

SMART Training Materials

Provides an overview to the training materials used on the website

Training Materials Overview

This section is designed to give you an **overview of the SMART Training Materials**. Listed below are links to documents regarding the SMART Training Materials; the icons used, the types of documents used, formats of documents, and so on.

In order to meet accessibility requirements, some SMART Training Material content is being developed in multiple formats, namely .PDF files and online web pages.

The **.PDF file format** allows you to open and view the document in a page format, which also allows for printing of the document if necessary. Please note that it is the State of Kansas best practice ***NOT TO PRINT*** training documents because these documents are updated on a frequent basis.

The **online (web page) format is accessed by clicking a blue navigation button** (where available) to open the web page(s) containing the content of the document. Web pages launch from the current page; they do not open in a new window. Once you have finished viewing the content on a web page, use the back button in your browser to return to the previous page. *Please note that the online web page format is recommended for users employing assistive technology devices and/or software.*

PDF SMART Training Materials - Icon Guide - V.1.8 | Icon Guide

PDF SMART Training Materials - Guide For Use - V.1.1 | Guide For Use

Click a document link to open the .PDF file in a new window, OR

Click a navigation button to open the Web Page(s) with the same content

SMART *Web* - Materials - Icon Guide

On the 'New Users' Page - Click the 'Overview of SMART Training Materials button:

Overview of SMART Training Materials

Home Announcements Policy & Forms

Home > Training > SMART Training Materials

SMART Training Materials

TRAINING MATERIALS OVERVIEW

SMART Web - Icon Guide - 8-22-13

.PDF File, **OR**

Icon Guide

For the Web Page(s)

SMART Training Materials – Icon Guide	
V.1.9.	8/22/2013

This document contains a guide to the icons used in the SMART Training Materials

Types of Training Materials

This section contains a guide to the icons that are used within the different types of training materials on the **SMART *Web*** website (listed in alphabetical order)

Checklist: The **checklist icon** indicates this document contains a summary list of Foundation information, Tools, Scenarios, Examples, and Job Aids that can be used to aid you in the resolution of a specific issue.

Example: The **example (e) icon** indicates this document contains an Example (case study) of an issue, a resolution, or a scenario.

Provides a guide to the icons used within the SMART training materials and on the SMART Web website

SMART *Web* - Materials - Guide for Use

On the New Users Page:

Overview of SMART Training Materials

Home | Announcements | Policy & Forms

Home > Training > SMART Training Materials

SMART Training Materials

TRAINING MATERIALS OVERVIEW

SMART Training Materials - Guide For Use - V.1.1

Guide For Use

.PDF File, OR Web Page(s)

SMART Training Materials – Guide For Use

V.1.1.	7/26/2012

This document contains a guide to the SMART Training Materials and how to use them

SMART Training Materials - Icon Guide: The **Icon Guide** document contains a comprehensive list of the icons used within all SMART Training Materials. The Icon Guide provides the user with a graphic example of each icon and a description for each icon.

Checklists

- Checklists are numbered and have a title
  For example: *Checklist 1 – Cannot Pull PO into Voucher*
- Each Checklist document contains a 'Checkmark' graphic in the top left corner (as shown to the left of this text)
- Each Checklist is intended to help the end us… …dress and trouble shoot a specific question or issue within SMART
- Each Checklist contains a comprehensive lis… …ining Materials that relate to the Checklist question or the module area. For ex… Examples, Job Aids, and Solution…

Provides a guide to the <u>types of training materials</u> on the SMART *Web* website and provides an explanation for each type

SMART *Web* – Materials – Checklists

Checklists

- Checklists are numbered and have a title
  For example: *Checklist 1 – Cannot Pull PO into Voucher*
- Each Checklist document contains a 'Checkmark' graphic in the top left
  this text)
- Each Checklist is intended to help the end user address and trouble shoot a specific question or issue within SMART
- Each Checklist contains a comprehensive list of SMART Training Materials that relate to the Checklist question or the module area. For example: Foundation Information, Tools, UPK's, Scenarios, Examples, Job Aids, and Solution Articles

Explanation of '<u>Checklists</u>'
Excerpt from 'Guide For Use', .PDF File, Page 1

Checklist 1 - Cannot pull PO into Voucher	
V.1.8.	7/25/2012

This document contains a list of information, tools, and scenarios to help resolve this issue

Foundation Information

- It is important to understand that a Purchase Order (PO) must be:

Approved → 'Valid' Budget Status → 'Dispatched' PO Status

<u>Example of a Checklist</u>
Excerpt from 'Checklist 1 – Cannot pull PO into Voucher' .PDF File

SMART *Web* – Materials – <u>Foundation Information</u>

FOUNDATION INFORMATION

- Foundation information provides important 'building block' info
  functionality requirements which impact each SMART module a
- Each Foundation Information section contains a 'brick wall' gra
  text)

Explanation of '<u>Foundation Information</u>' –
Excerpt from 'Guide For Use', Page 1, web page

<u>Foundation Information</u>

- It is important to understand that a Purchase Order (PO) must be:

  Approved → 'Valid' Budget Status → 'Dispatched' PO Status

  <u>BEFORE</u> it can be pulled in to a voucher.

- At the Header Level of the PO: If the '**Hold from further processing**' checkbox is selected, the PO can NOT be pulled in to the voucher.
- If 'Receiving is Required' for the PO line, then a **<u>receipt</u>** must also be created *<u>BEFORE</u>* the PO can be pulled in to the voucher.
- Use the **Purchase Order Inquiry** page (**PO Tool 2**) to view the statuses of a purchase order in SMART.

<u>Example of Foundation Information</u>
Excerpt from 'Checklist 1 – Cannot pull PO into Voucher', .PDF file

SMART *Web* – Materials – Tools

Explanation of ‘Tools’
Excerpt from ‘Guide For Use’ web page, Page 1

Tools

- Tools are designed to provide information regarding key page components that can be used to research and view additional … or a module
- Tools are named by SMART Module, Tool number, and Title. For example: PO Tool 1 – Activity Summary Page
- Each Tool document contains a ‘Tool Sign’ graphic in the top left corner (as shown to the left of this text)

Example of a Tool
Excerpt from ‘PO Tool 1 – Activity Summary Page’, .PDF file

PO Tool 1 - Activity Summary Page

V.1.4.	07/12/12

Use the **Activity Summary** page to review summary information pertaining to purchase orders, receipts, vouchers, payments, matching information, and RTV (Return to Vendor) information.
Anyone with the ‘**Agency Purchasing Viewer**’ role can access this page and view the information on it.

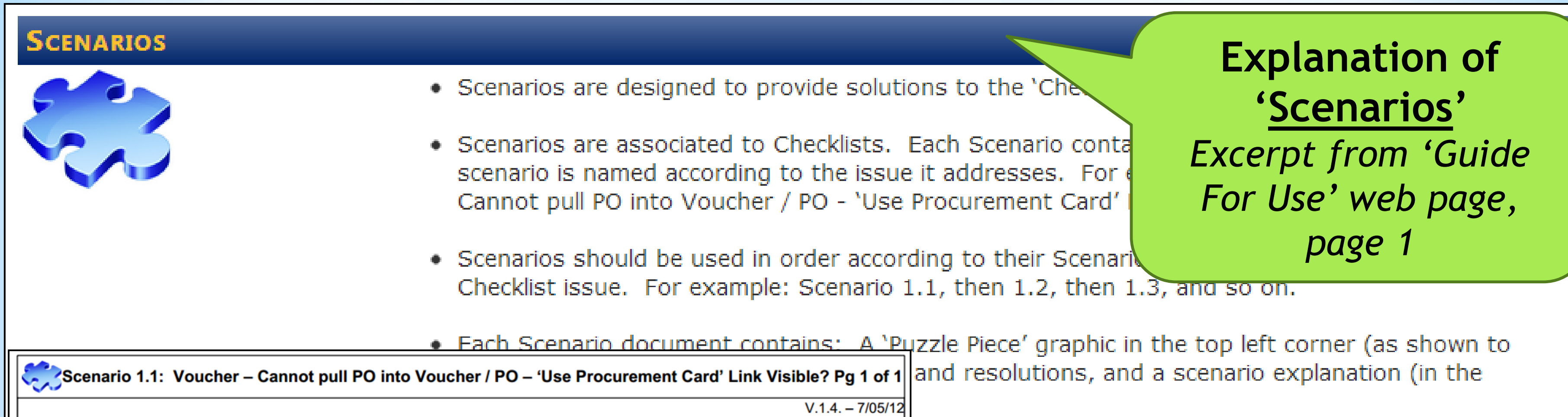
Navigate to the Activity Summary page: Purchasing > Purchase Orders > Review PO Information > Activity Summary → Enter the search criteria and click the Search button → Select the desired search result to open the **Activity Summary** page

DETAILS TAB

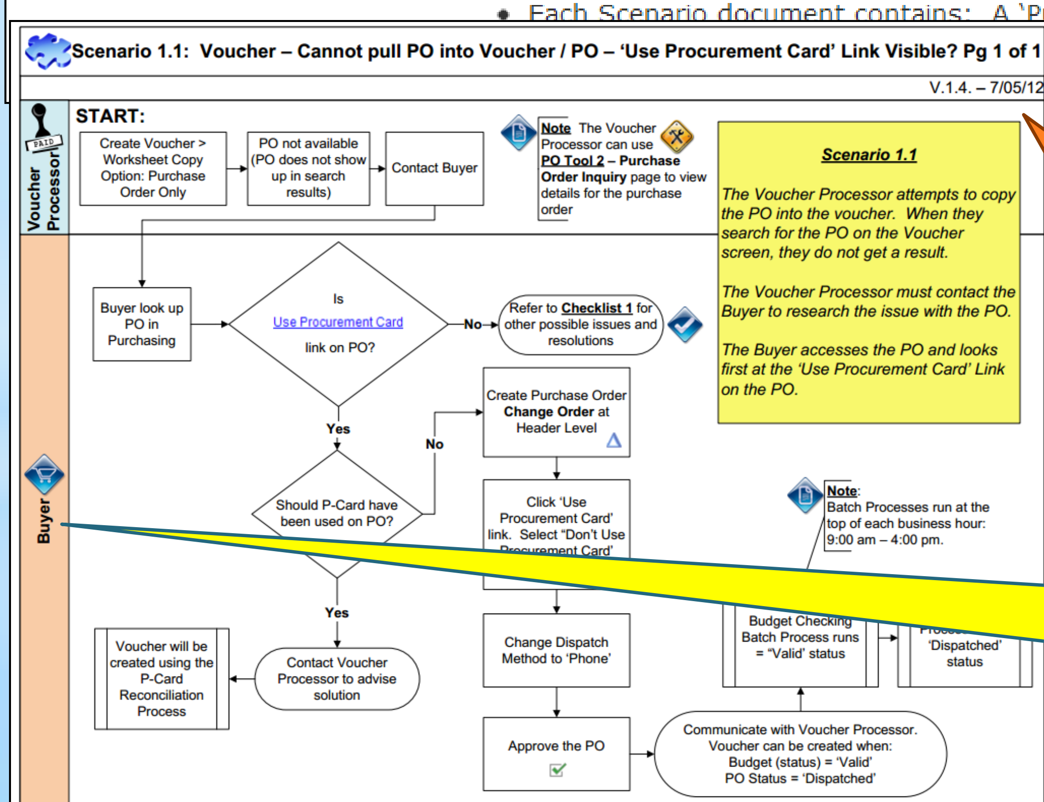
Use the first tab – the **Details tab** to view the ‘Order Qty’, ‘Amount Ordered’, and the ‘Amount Only’ checkbox

Activity Summary

SMART *Web* - Materials - Scenarios



Explanation of 'Scenarios'
Excerpt from 'Guide For Use' web page, page 1

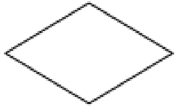


Example of a Scenario
"Scenario 1.1: Voucher - Cannot pull PO into Voucher / PO - 'Use Procurement Card' link Visible?", .PDF file

This Business Process Flow diagram contains SMART Security Access Role assignments/modules

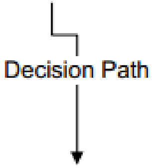
SMART *Web* – Materials – <u>Business Process Flows</u>

Decision Point



A diamond shape represents a decision point. This is a decision that needs to be made by the end user in SMART. Decision points are connected to their next steps by a 'connector', indicating which path the end user should take.

Decision Path



A 'connector' (arrow) indicates the direction in which the information is flowing. Any time a decision point (diamond shape) is encountered, the end user will be given a decision, and resulting decision paths based on the decision outcomes. The end user follows the desired path indicated by the connectors until a 'terminator' (oval or ellipse) shape is reached.

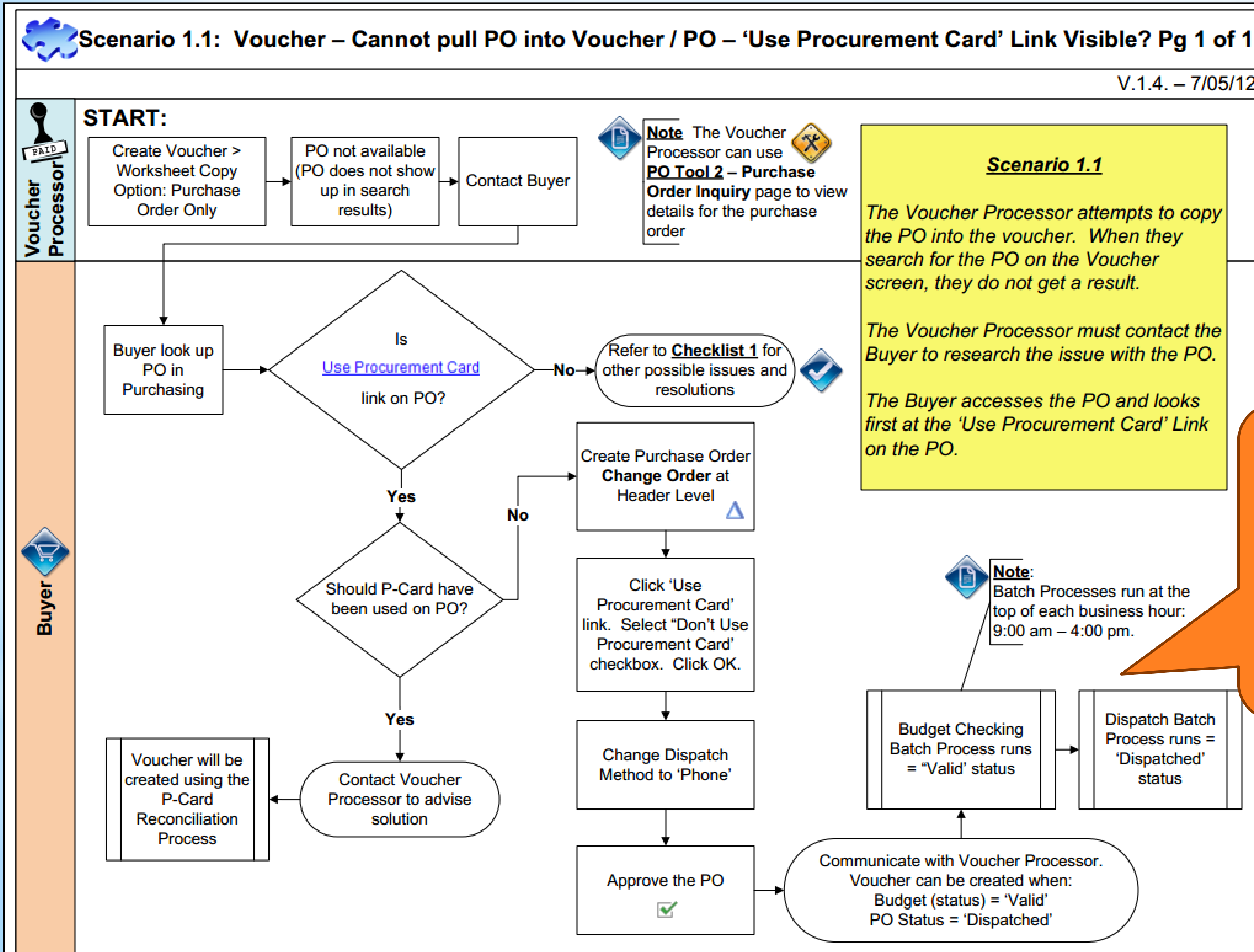
End or Terminator

The oval or ellipse shape (known as a 'terminator') indicates the end of this decision path or business process flow. Additional notes or information may be provided in conjunction with the terminator shape.

Explanation of '<u>Business Process Flow Shapes</u>'
Excerpt from 'Guide For Use' web page, Page 2

Each business process flow shape definition is provided, to help the end user interpret the (sometimes complex) business process flow diagrams

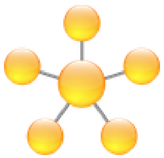
SMART *Web* - Business Process Flow - Example



Example of a Business Process Flow Diagram

SMART *Web* -Integration Training Materials

Home > Training > Integration Materials



Integration Training Materials

Integration covers the integration points between the different modules within SMART

What is 'Integration'?
Integration in SMART is *where and how* the SMART modules directly interact with one another and impact one another. There are many integration points between the fourteen modules within SMART. Integration means that different modules in SMART either *share or use* the same data within SMART.

Integration example
This example shows you how information is shared and used between different modules in SMART:
An *Agency Voucher Processor* selects a **Purchase Order** (from the Purchasing module) to pay a **Voucher** (in the Accounts Payable module). The Agency Voucher Processor selects the Purchase Order (PO) so that the information from the Purchase Order is populated in to the Voucher, this integrates the two modules and transactions together in SMART, and creates efficiency (less data entry as information is automatically populated from the PO to the Voucher).

Integration Training Materials
The SMART Training Materials provided within this Integration Training Materials section address potential issues or within SMART; and provides you with the tools, information, and scenarios to assist you in resolving those is

Example of Integration Information

Purchasing (PO) and Accounts Payable (AP)

PO and AP

This section addresses the integration between the Purchasing modules (PO) and the Accounts Payable modules (AP).

SMART *Web* - Example: PO & AP Integration

Integration - PO (Purchasing) and AP (Accounts Payable)

Checklists

Checklist 1 - Cannot pull PO into Voucher — Checklist 1

Checklists - Contain common issue(s)

Tools

AP Tool 1 – Create Voucher – Worksheet Copy Option — AP Tool 1

GEN Tool 1 – Req to Check Process in SMART — GEN Tool 1

PO Tool 1 - PO Activity Summary Page — PO Tool 1

PO Tool 2 - Purchase Order Inquiry Page — PO Tool 2

PO Tool 3 - PO Accounting Entries — PO Tool 3

PO Tool 4 - 'Amount Only' Information — PO Tool 4

Tools contain information which pertains to the SMART pages used, and steps of the issue(s) / resolution(s)

Scenarios

Scenario 1.1 - Is 'Use Procurement Card' Link Available — Scenario 1.1

Scenario 1.2 - Vendor ID — Scenario 1.2

Scenario 1.3 - Is PO a 'Quantity' PO — Scenario 1.3

ation-materials

Scenarios provide the step-by-step instructions (in order) for the resolution of the issue(s). Start with the first Scenario and work your way through them (in numerical order)

SMART *Web* - Case Study: Checklist 1

Home > Training > Integration Materials > PO and AP > Checklist 1

Checklist 1 - Cannot pull PO into Voucher

This page contains a list of foundation information, tools, and scenarios to assist you in resolving this issue.

FOUNDATION INFORMATION

TOOLS

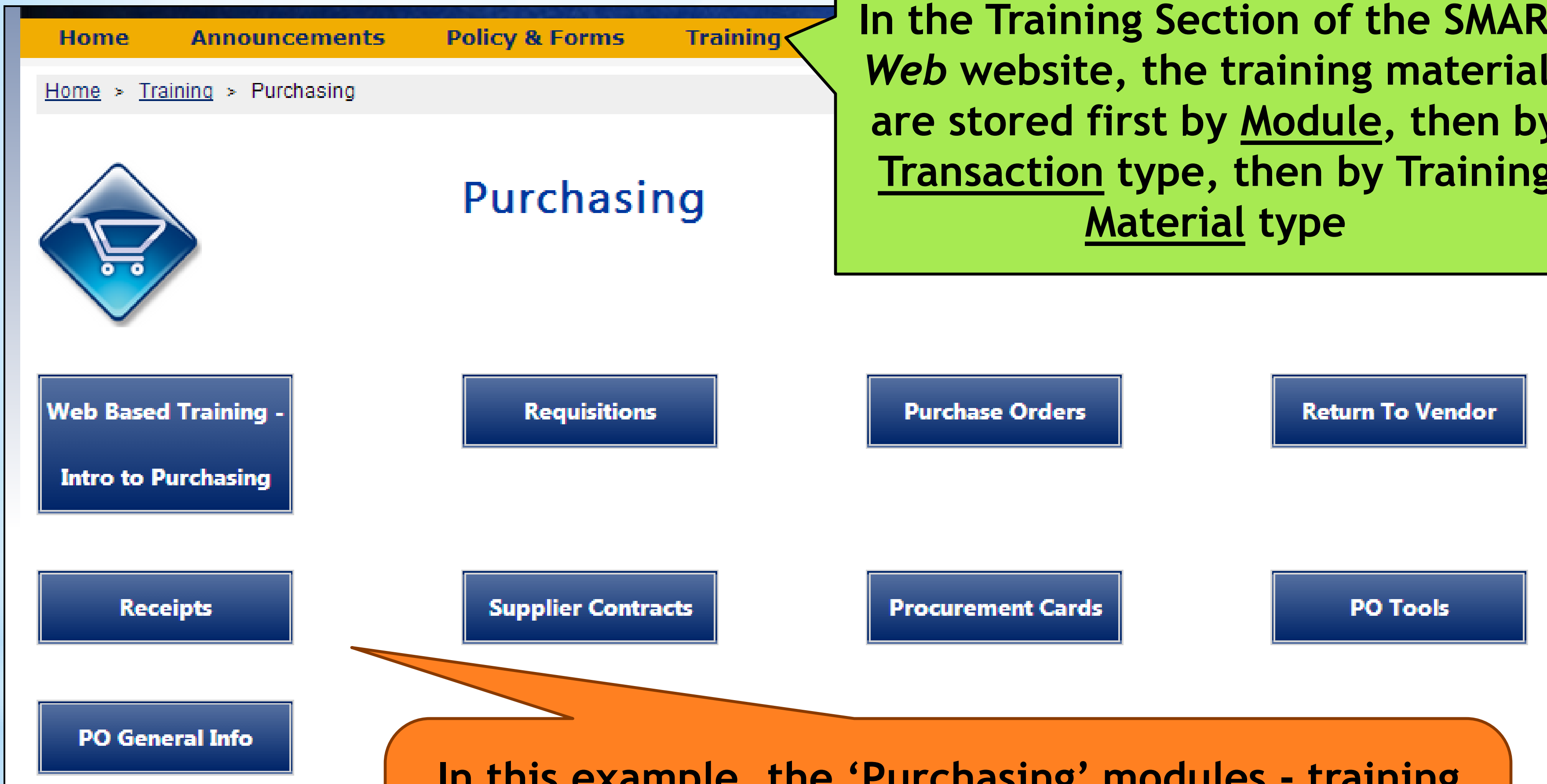
SCENARIOS AND SOLUTIONS

- Scenario 1.1 - Is 'Use Procurement Card' Link Available — Scenario 1.1
- Scenario 1.2 - Vendor ID — Scenario 1.2
- Scenario 1.3 - Is PO a 'Quantity' PO — Scenario 1.3
- Scenario 1.4

In this Case Study, Checklist 1 is used

In this Case Study, review the Foundation Information first, then review the Tools; lastly review the Scenarios (in order), and follow the steps in each Scenario until the issue is resolved

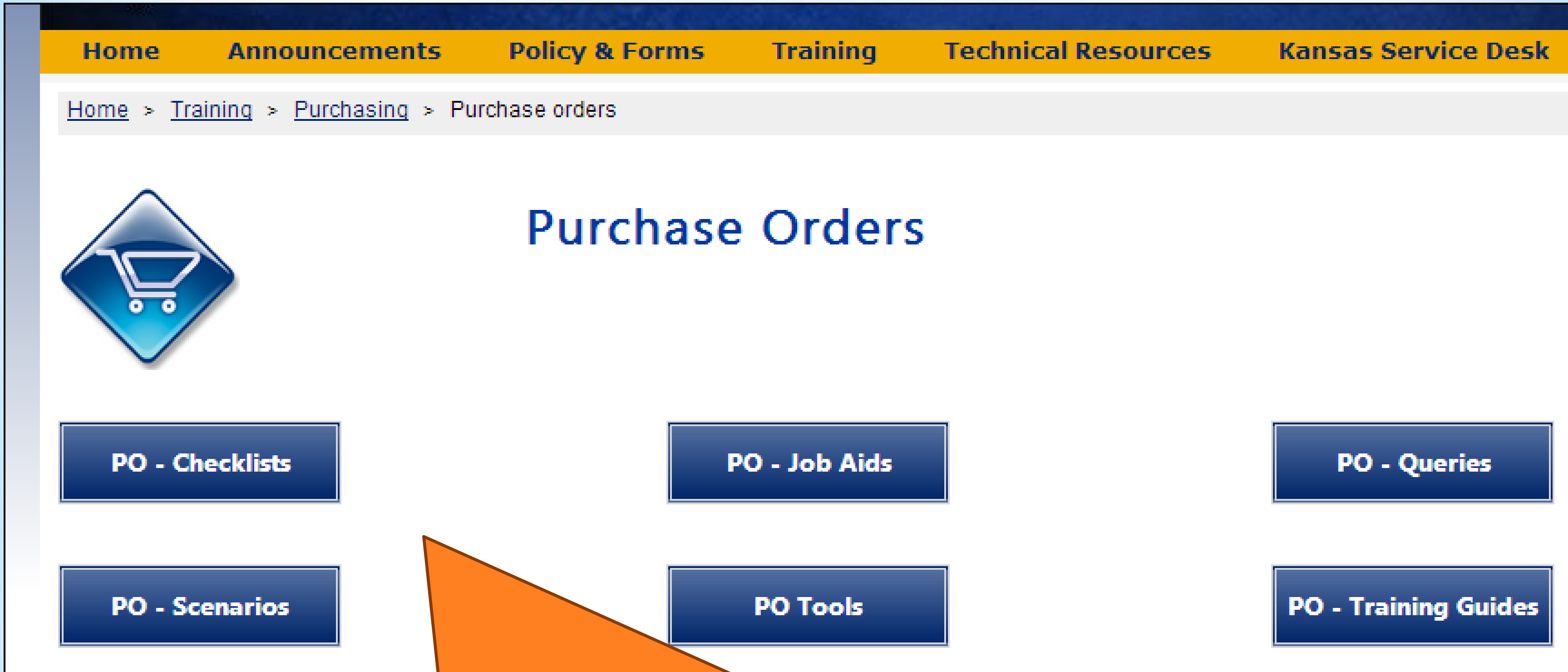
SMART *Web* - Training Materials - <u>Organization</u>



In the Training Section of the SMART *Web* website, the training materials are stored first by <u>Module</u>, then by <u>Transaction</u> type, then by Training <u>Material</u> type

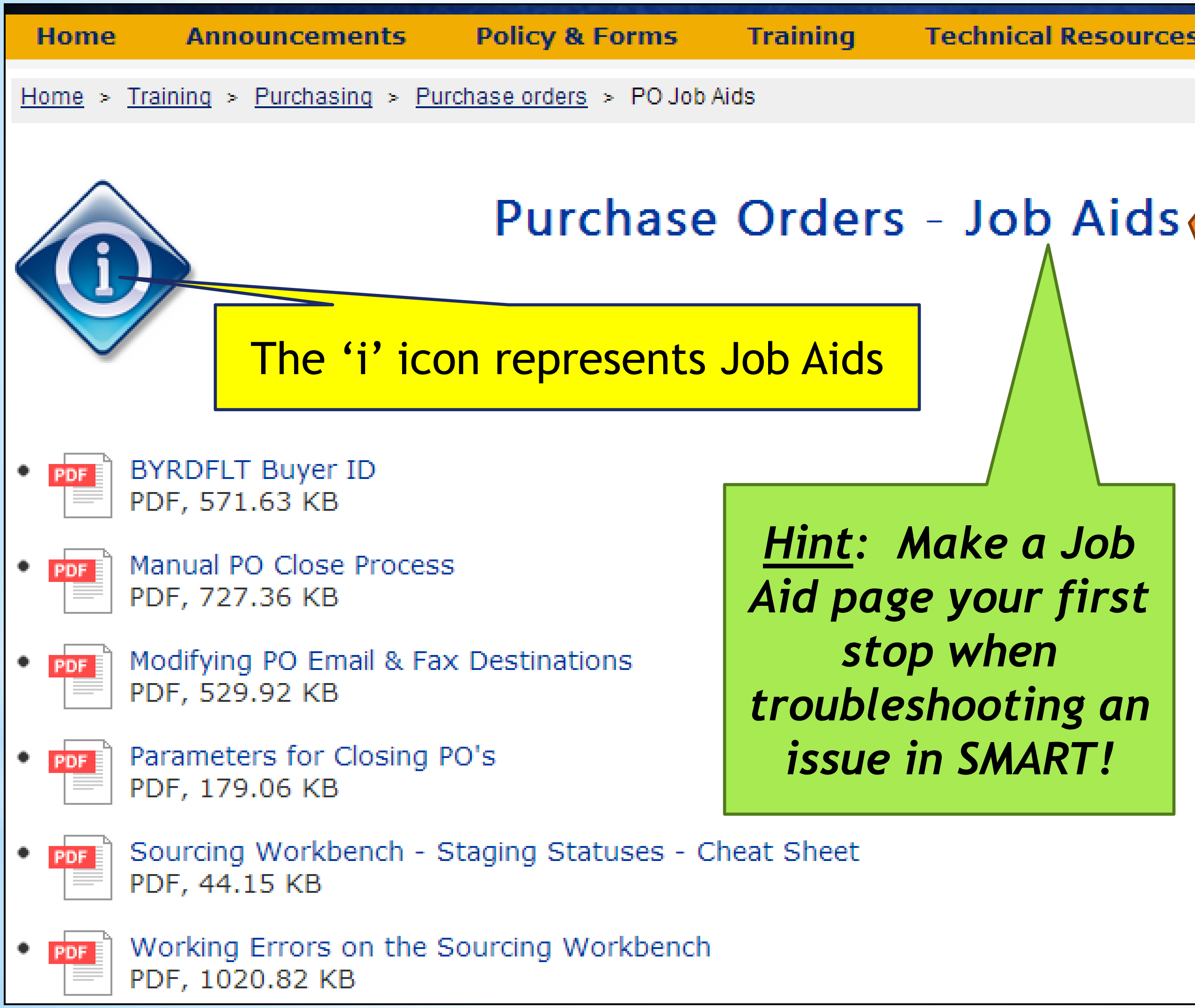
In this example, the 'Purchasing' modules - training materials page has been opened. It is divided into the different Purchasing <u>transaction types</u> in SMART, and also by the different <u>training material</u> types.

SMART *Web* – Training Materials – <u>Transaction Pages</u>



In this example, the 'Purchase Orders' training materials page has been opened. As you can see, it is divided into the different <u>training material types</u> such as Checklists, Job Aids, Queries, and so on.

SMART *Web* - Training Materials - Job Aids



Job Aids provide detailed information and instructions for specific tasks or issue resolution steps within SMART.

In this example, the Purchase Orders - Job Aids page is displayed.

SMART *Web* - Training Materials - <u>Queries</u>

Home | Announcements | Policy & Forms | Training | Technical Resourc

Home > Training > Purchasing > Purchase orders > PO - Queries

Purchase Orders – Queries

The 'report page' icon represents Queries

- PDF Using the KS_PO_CLOSED_POS Query
  PDF, 581.64 KB
- PDF Using the KS_PO_MAY_CLOSE Query
  PDF, 647.89 KB
- PDF Using the KS_PO_NEGATIVE_PO_LINES Query
  PDF, 472.67 KB
- PDF Using the KS_PO_POWPCA
  PDF, 426.72 KB
- PDF Using the KS_PO_SHIPTO_
  PDF, 693.51 KB

State of Kansas
Using the KS_PO_NEGATIVE_PO_LINES Query
Statewide Management, Accounting and Reporting Tool

Date Created:	June 8, 2012
Version:	2.1
Last Updated Date:	May 2, 2013
Purpose of the Query:	Negative PO lines create unauthorized budget in the SMART system. From a system perspective, if a negative PO line is entered that creates unauthorized budget, a requisition can be created using the unauthorized budget, the requisition can successfully source to a Purchase Order and the Purchase Order can be successfully budget checked; however, no cash exists because the created budget was not authorized. Consequently, agencies should not enter negative PO lines. A query has been created to identify those POs that have a negative PO line.

<u>Queries</u> provide detailed information and instructions to run a specific query within SMART.

In this example, the <u>Purchase Orders - Queries</u> page is displayed.

SMART *Web* - Training Materials - Training Guides

Home | Announcements | Policy & Forms | Training | Technical Resources | Kansas

Home > Training > Purchasing > Purchase orders > PO - Training Guides

Purchase Orders – Training Guides

The 'compass' icon represents Training Guides

- Reviewing and Approving POs - Training Guide
  PDF, 3.14 MB

Statewide Management, Accounting and Reporting Tool

Training Guide – Purchasing

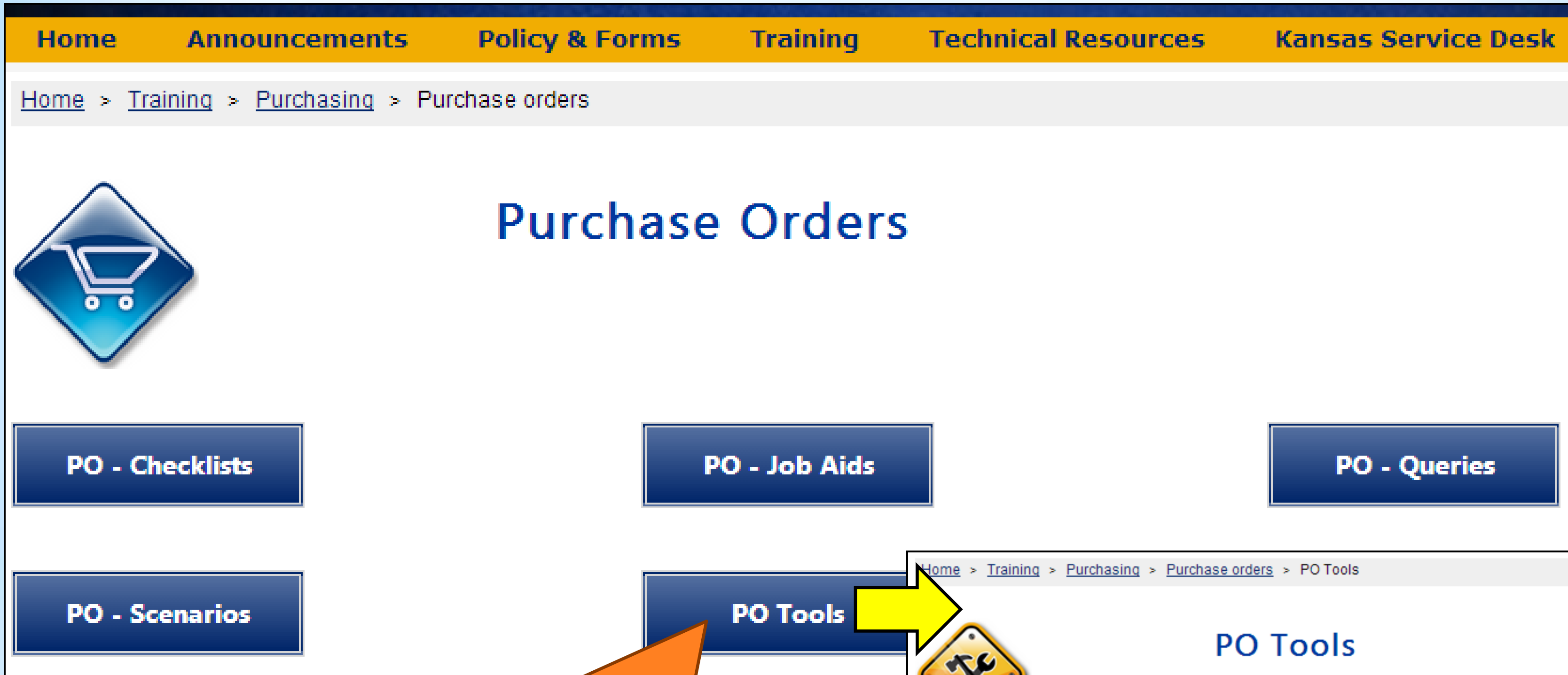
Purchase Orders: Reviewing & Approving

State of Kansas

Training Guides are used during on-the-job training by Agency trainers to train new users for specific transactions or modules within SMART.

In this example, the Purchase Orders - Training Guides page is displayed.

SMART *Web* - Training Materials Pages



Each of the different types of training materials also have their own page. In this example, the PO Tools page has been opened, and is shown at right.

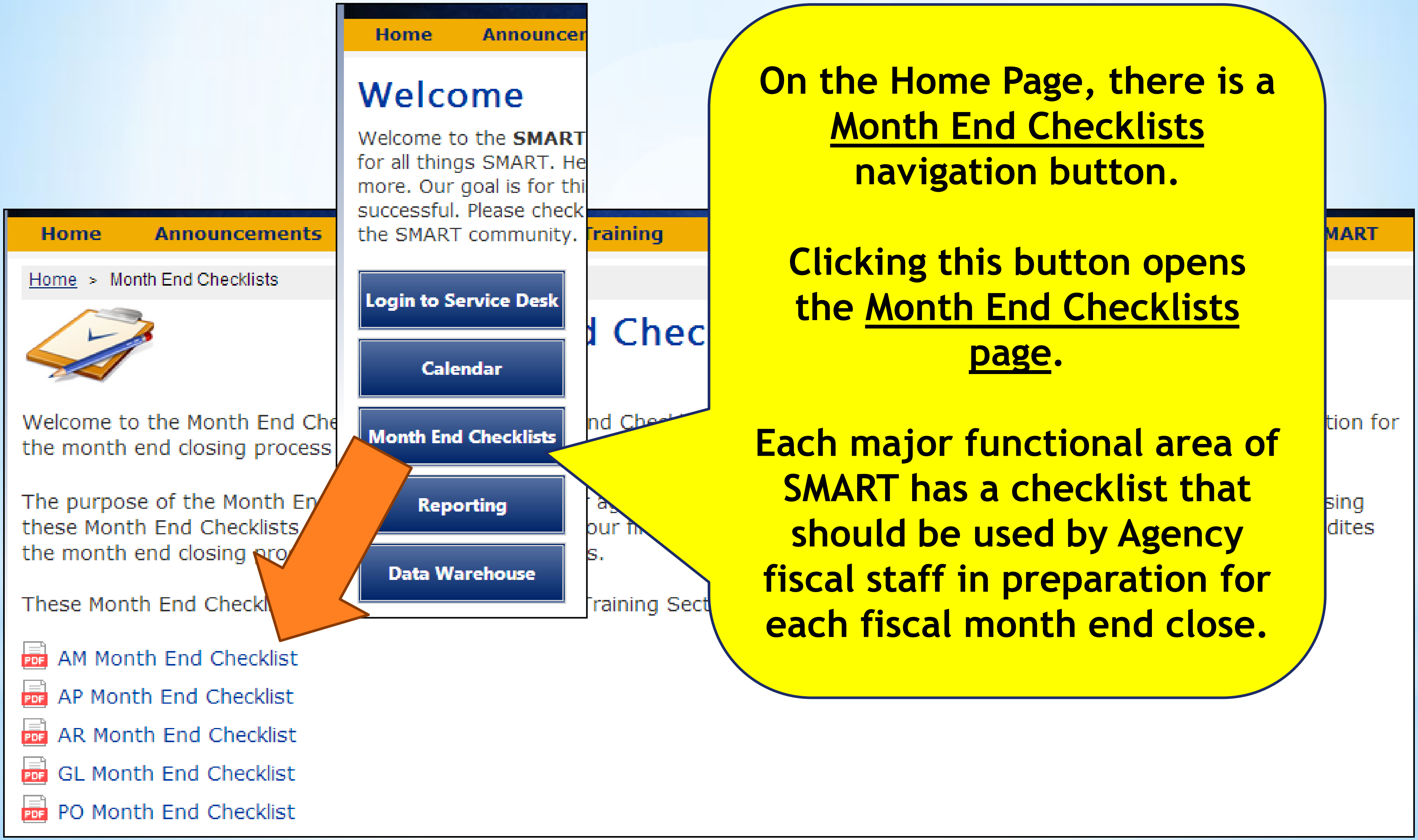
SMART *Web* -Search Box

There is a Search Box located in the top right corner of the SMART *Web* website (available from every page on the website).

Use the Search Box to perform keyword searches for modules, transactions, issues, titles of training materials, articles, etc.

The content of the SMART *Web* website is 'Tagged' and 'Categorized' which allows for easy keyword or module specific searches

SMART *Web* – Month End Checklists

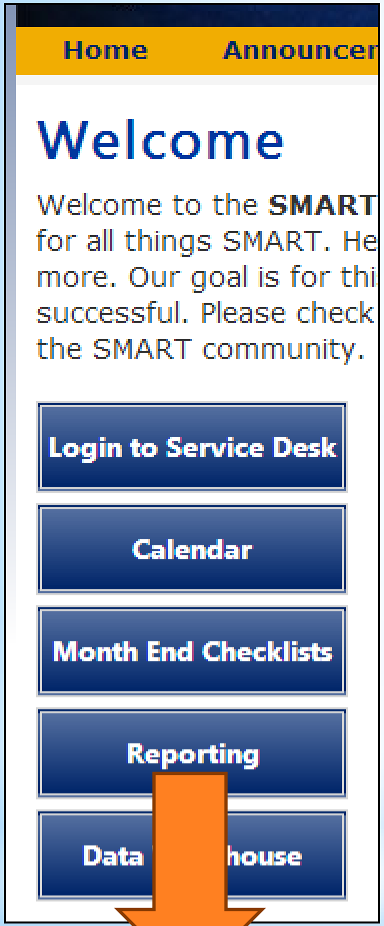


On the Home Page, there is a Month End Checklists navigation button.

Clicking this button opens the Month End Checklists page.

Each major functional area of SMART has a checklist that should be used by Agency fiscal staff in preparation for each fiscal month end close.

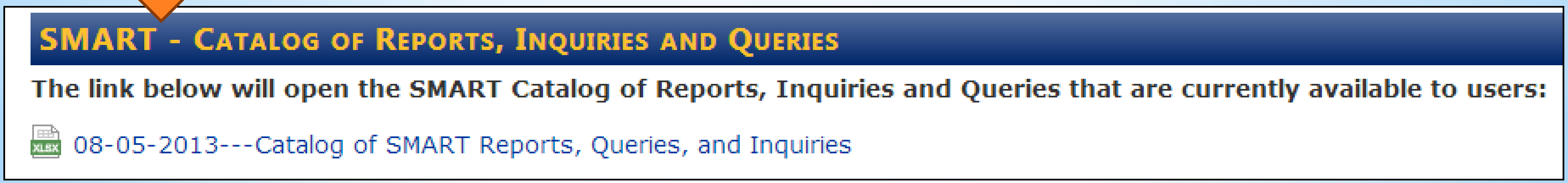
SMART *Web* - Reporting in SMART



There is a comprehensive **SMART Catalog of Reports, Inquiries, and Queries** available on the **SMART *Web*** website.

Simply click the '**Reporting**' button located on the Home page to open the **Reporting in SMART** page. The Reporting in SMART page contains a link to the Catalog.

The **link** to the Catalog file is available as a '.xlsx' file. Click the .xlsx file link to download the complete catalog.



SMART *Web* – Catalog of Reports, Queries & Inquiries

In the **Catalog:** The **first tab** contains ALL reports, queries, and inquiries within SMART. If desired, use the column filters to sort the data:

Report/Query/Inquiry Name	Modu...		SMART or DW	Description	Navigation in SMART / DW	SMART Role	Export Option(s)
KS_KK_CASH_BAL_DETAIL_FY13	KK	Query	SMART	Query of Cash against the CC_CASH and	Reporting Tools -> Query -> Query Viewer	KGL_KS_GL_VIEWER	Excel, HTML

In the **Catalog**: The **subsequent tabs** are divided by module, and provide additional information for each report, query, or inquiry including '**Search Criteria**' (to enter to retrieve the data) and '**Display Results**' (that shows how the data results are displayed, which are contingent on the Search Criteria entered).

In this example, the **AP tab** of the Catalog is shown:

ACCOUNTS PAYABLE

Last Updated: 07-29-2013

Accounts Payable - Additional Job Aids (on SMART WEB website)

Using the KS_PO_VCHR_TO_PCARD_XREF query

If desired, click the link above to open the document in a new window.

In the table below, the highlighted fields contain links to Job Aids on the SMART WEB website.

Job Aids provide additional information regarding the query or report. Click the link to open the job aid document in a new window.

Type:

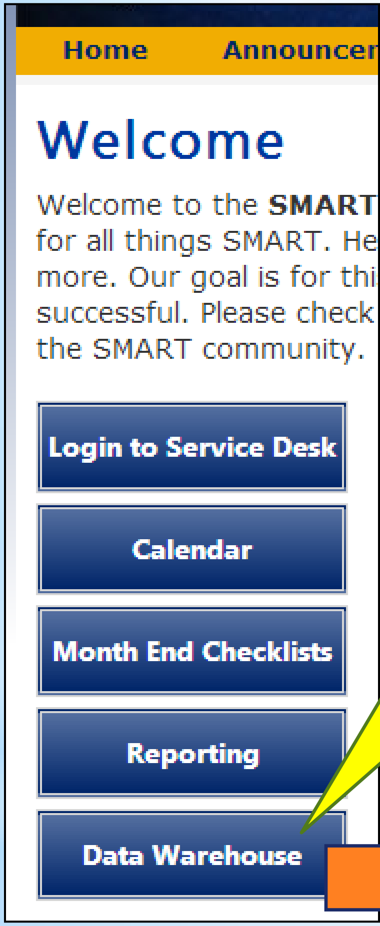
Inquiry - View results in SMART - online pages. You enter the search criteria and can then view the information online in SMART.

Query - Uses the Reporting Tools function. Enter the desired Search criteria, and then run the query to view or export the results (using Excel).

Report - Enter the Search criteria to retrieve the desired records. Multiple Export options.

Name of Inquiry, Query, or Report	Type	Description	Navigation path in SMART	SMART Roles who can access	Export Option(s)

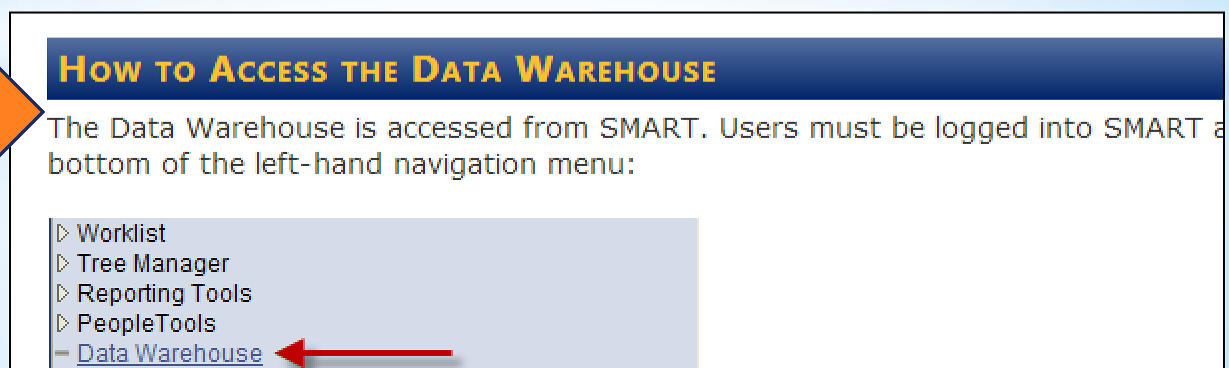
SMART *Web* – Data Warehouse



The SMART *Web* website contains a Data Warehouse overview page.

Clicking the '<u>Data Warehouse</u>' button on the Home Page of the SMART *Web* website, opens a page that contains training materials for the Data Warehouse, and instructions on how to access the Data Warehouse (from SMART).

The page also contains .PDF files describing some of the dashboards and reports that are available within the Data Warehouse.



SMART *Web*

Statewide Management, Accounting & Reporting Tool

Congratulations!

You have now learned how to best use the **SMART *Web*** website.

Since the **SMART *Web*** website is your 'one stop shop' for all things SMART, you will probably end up visiting it on a daily basis. Listed below is the URL address for your convenience:

URL: https://smartweb.ks.gov