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
*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

Provides you with up to the moment availability of SMART

SMART Current Status: Available

(status entered at 8/9/2013 7:59:31 AM)

Calendar of upcoming events that impact SMART and SMART users

Click the light bulb to submit SMART Web website feedback as desired

SMART Info List Email - Please Sign Up now!
SMART Web - Stay Informed!

Welcome

Welcome to the SMART Web website! We're very excited to bring you a dynamic and easy-to-use site for all things SMART. Here, you'll be able to find up-to-date news, training materials, and more. Our goal is for the SMART team to provide valuable information and resources to make our employees be successful. Please check back often for updates to the SMART community.

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

Contains an archive of emails sent out from the SMART Info List

NOTE: Announcements dated January 4, 2013 are older email "blasts" that are commonly referenced.

TODAY'S ANNOUNCEMENTS

ANNOUNCEMENTS BY TOPIC

Stored by SMART Module
Each month one of our SME’s (Subject Matter Experts) writes an in-depth article about their module.
SMART Web - Policy & Forms

Security Access Forms to set up new users in SMART

Frequently used links

Frequently Used Accounting Forms

SMART Secure Access Forms

The following files are the SMART Security Access Forms.
Submit the completed forms to change access and removing roles to an employee, provide employees no longer with your agency or

- PDF Security Access Guide
  PDF, 624.70 KB
Interfaces - Give agencies the ability to ‘upload’ files into SMART

Bundles & Upgrades - Pertains to PeopleSoft software updates

Compatibility - 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:

Solutions Available!

Finding a solution is easy and anyone can do it! Click on the Solutions image below to search the 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 login screen of Employee Self Service, SHaRP, or SMART.

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

Open a Service Desk Request (if applicable)

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

Reset your own password

Service Desk Hours
Overview
Includes Purpose and History of SMART

SMART Implementation
Links to original Sunflower project - SMART Implementation Information (Historical data)
The left menu shows how the Training information is organized and stored.

New users start their SMART training on this page.

Rolling over the top gold navigation bar options, prompts drop down menus to display.
SMART Web - 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.

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

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

SMART Training Materials

Trainig Materials Overview


Provides a guide to the types of training materials on the SMART Web website and provides an explanation for each type.

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 user address and troubleshoot 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: Examples, Job Aids, and Solutions...
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- Each Checklist is intended to help the end user address and troubleshoot 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

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
Foundation Information

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

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

  *BEFORE* 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 **receipt** must also be created **BEFORE** 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.

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*Explanation of ‘Foundation Information’ - Excerpt from ‘Guide For Use’, Page 1, web page*

*Example of Foundation Information*

*Excerpt from ‘Checklist 1 - Cannot pull PO into Voucher’, .PDF file*
SMART Web - Materials - Tools

Tools

- Tools are designed to provide information regarding key page components that can be used to research and view additional information on 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).

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.

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

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

**Explanation of ‘Business Process Flow Shapes’**
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.
Example of a Business Process Flow Diagram

Scenario 1.1: Voucher – Cannot pull PO into Voucher / PO – ‘Use Procurement Card’ Link Visible? Pg 1 of 1

V.1.4. – 7/05/12

START:

Create Voucher > Worksheet Copy Option: Purchase Order Only → PO not available (PO does not show up in search results) → Contact Buyer

Note: The Voucher Processor can use PO Tool 2 – Purchase Order Inquiry page to view details for the purchase order.

Scenario 1.1

The Voucher Processor attempts to copy the PO into the voucher. When they search for the PO on the Voucher screen, they do not get a result.

The Voucher Processor must contact the Buyer to research the issue with the PO.

The Buyer accesses the PO and looks first at the ‘Use Procurement Card’ Link on the PO.

Example of a Business Process Flow Diagram

- Buyer look up PO in Purchasing
- Is Use Procurement Card link on PO?
- Yes
  - Create Purchase Order Change Order at Header Level
  - Should P-Card have been used on PO?
  - Yes
    - Voucher will be created using the P-Card Reconciliation Process
    - Contact Voucher Processor to advise solution
  - No
    - Refer to Checklist 1 for other possible issues and resolutions
- No
  - Contact Buyer

Note: Batch Processes run at the top of each business hour: 9:00 am – 4:00 pm.

Communicate with Voucher Processor.
Voucher can be created when:
Budget (status) = ‘Valid’
PO Status = ‘Dispatched’

Budget Checking Batch Process runs = ‘Valid’ status
Dispatch Batch Process runs = ‘Dispatched’ status

Change Dispatch Method to ‘Phone’
Approve the PO
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 into 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 conflicts within SMART; and provides you with the tools, information, and scenarios to assist you in resolving those issues.

Example of Integration Information

Purchasing (PO) and Accounts Payable (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

**Tools**

- AP Tool 1 - Create Voucher - Worksheet Copy Option
- GEN Tool 1 - Req to Check Process in SMART
- PO Tool 1 - PO Activity Summary Page
- PO Tool 2 - Purchase Order Inquiry Page
- PO Tool 3 - PO Accounting Entries
- PO Tool 4 - 'Amount Only' Information

**Scenarios**

- Scenario 1.1 - Is 'Use Procurement Card' Link Available
- Scenario 1.2 - Vendor ID
- Scenario 1.3 - Is 02 a 'Quantity' PO

**Checklists** - Contain common issue(s)

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

**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).
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.
In the Training Section of the SMART Web website, the training materials are stored first by Module, then by Transaction type, then by Training Material type.

In this example, the ‘Purchasing’ modules - training materials page has been opened. It is divided into the different Purchasing transaction types in SMART, and also by the different training material types.
In this example, the ‘Purchase Orders’ training materials page has been opened. As you can see, it is divided into the different training material types 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.

Hint: Make a Job Aid page your first stop when troubleshooting an issue in SMART!
Queries provide detailed information and instructions to run a specific query within SMART.

In this example, the Purchase Orders - Queries page is displayed.
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.
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.
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.
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.
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:

<table>
<thead>
<tr>
<th>Report/Query/Inquiry Name</th>
<th>Module</th>
<th>SMART or DW</th>
<th>Description</th>
<th>Navigation in SMART / DW</th>
<th>SMART Role</th>
<th>Export Option(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>KS_KK_CASH_BAL_DETAIL_FY13</td>
<td>KK</td>
<td>Query</td>
<td>Query of Cash against the KS_CASH and KK_CASH balance sheet</td>
<td>Reporting Tools -&gt; Query -&gt; Query Viewer</td>
<td>KGL_KS/GL_VIEWER</td>
<td>Excel, HTML</td>
</tr>
</tbody>
</table>

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:

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ACCOUNTS PAYABLE
Last Updated: 07-29-2013

**Accounts Payable - Additional Job Aids** (on SMART WEB website)
1. Using the KS PO VCHR TO PCARD XREF query
2. 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.

<table>
<thead>
<tr>
<th>Name of Inquiry, Query, or Report</th>
<th>Type</th>
<th>Description</th>
<th>Navigation path in</th>
<th>SMART Roles who can access</th>
<th>Export Option(s)</th>
</tr>
</thead>
</table>
**SMART Web - Data Warehouse**

The SMART Web website contains a Data Warehouse overview page.

Clicking the ‘Data Warehouse’ 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.
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