A Guide to Using

SMART Systems

System ~ Management ~ And ~ Reporting ~ Tools

Online Ordering

Version 17.1
Updated as of 8/8/2017
Online Ordering

Introduction

The SMART eResources (SMART eR) – Ordering is a web-based system for users to enter ordering information. SMART eR will now allow for the entire process of requisition entry, routing and approval, transferring to a PO, and placing orders back directly to the Ordering vendors. SMART eR currently offers two different methods for users to order: order requisition or shopping for items; that will eventually transfer into SMART Finance (SF) in the form of a purchase order. Each district business office will need to work with their Region’s staff to get the appropriate people set up to use these functions. Your Region’s staff will also need to verify your online vendor(s) are set up correctly. The online vendors a district can choose from today include: Corporate Express (Staples), Innovative Office Solutions, Office Max, School Specialty, Frey Scientific, Classroom Direct, Broadhead Garrett, Hammond & Stephens, Follett, Office Depot, Lakeshore Learning and Express.

An “Ordering (with Online Vendors)” section within this document, describes the steps to complete Online Ordering for specific outside vendors via a “punch-out” system. This allows district staff to sign into SMART eR and actually go to a vendor’s website to create a list of requested items. (The vendor’s website is made available originally by choosing which online vendors a district wants to use and having your Region help you with a one-time setup of the URLs and account credentials.) After checking out from the vendor’s website, the listed items are then transferred from checkout to the Order Requisition Entry page in SMART eR. Depending on the district setup, this requisition will go through your district’s approval process in SMART eR to be ready for transfer to a PO. When approval is completed, a person with the appropriate credentials (POADMIN) can transfer the information into a SF purchase order. Then, they can place the order directly to the vendor if shopping online.

The “Order Requisition Entry” section describes how employees can create an Order Requisition (electronic request form) in SMART eR to be processed for approval via SMART eR and then transferred into SF for purchase order processing. It allows the user to choose from a list of all active/viewable SF vendors to customize their request. They DO NOT go to a vendor’s website for this process. They simply choose a vendor from the list and key in the items they are ordering. Depending upon the district’s security access for each user, the entry of the requisition can be as simple as selecting a vendor, description of the item, number of units and rate. Or the entry can be for a full requisition which would also include SKU code and account code. The process on SMART eR is flexible for those that want to do approval of the requisition or for those that just want to process the requisition into a purchase order. Each requisition can be routed for approval on SMART eR prior to it becoming a purchase order. Otherwise, if your district prefers to do the approval process with the purchase order, this can be done on SF. A purchase order clerk (or other SF user) can take those requisitions and transfer the information into a SF purchase order, which can be printed or e-mailed directly to the vendor.
Both of these processes are designed to save time for the ordering process. Business office personnel will no longer need to key in the items to order since employees will do it themselves. Please review the benefits of the SMART eR requisition entry and approval process below and contact your Regional center to add any of these additional items to your current purchasing process.

The SMART eR requisition and approval process offers the following benefits to our users:

- Permissions with account code filtering per employee user.
- Ability to set one automatic default account code, buyer or ship-to-location per employee.
- Setting approval hierarchy with automation of route levels and approvers.
- Ability to give temporary access to another approver while out on leave.
- For ease of quick entry, a user will only see key fields. At a higher security level, fields required for entry will be available to complete the requisition.
- Electronic notification of order status within the requisition and purchase order process for original requester as well as approvers.
- Ability for users to access SMARTeR remotely to enter requisitions, approval or review order status.
- Ability for users to track the status of an order requisition.
- Users will be able to copy a previous closed order requisition.

### Setup Prior to ordering on SMART eR

#### Requisition Approvals

In order to process requisition approvals, the system needs to know this setting should be used. The Requisition Approval functionality can be set via SMART Finance>Administration>Application Setup>Application Options. Contact your Regional Support Center for assistance.

#### Overbudget Approvals

The Overbudget Controls functionality can be used with the Requisition Approvals as another layer of approval in the routing process. In addition to having Requisition Approvals checked in SMART Finance, the Enforce Overbudget Controls must also be checked to activate the overbudget approval process [SMART Finance>Administration>Application Setup>Application Options|PO tab]. Contact your Regional Support Center for assistance.
In Tray requirement to view item

Within the approval and routing process, a setting can be applied to make sure the requisition is viewed prior to approval. This setting is under SMART Finance>Administration>Application Setup>Application Options|Admin tab. When this is checked, the approval process will require the user to view the requisition prior to approval. Contact your Regional Support Center for assistance.

![In Tray requirement to view item](image)

Online Ordering employee roles

By default, all users have rights to the Requisition Entry page on SMARTeR. This default access does not give full rights to all fields within the Requestion Entry page, thus the higher security roles of PO and POADMIN would be used. Normally a PO role would have more rights than a default user but not all rights that a POADMIN does. POADMIN will have rights to all ordering pages and the final approval rights in the approval process if used as well as placing orders back to online vendor webstores.

If a user normally gains access to the Order Requisition Entry page and suddenly only can view payroll information, this may be due to their employee status. The system will only allow access to payroll information if the employee’s current status is not active as of today (based on a value entered in Last Date Worked).

Setup of Permissions & Approvers

Depending on your districts ordering process, setup of permissions and approvers must be completed to start the ordering process to utilize the approval process. To assist with setup, follow the guide, Ordering Setup Scenarios, to assist with setup. This document can be found under SMART Releases\v17.1\Support\eR Reference\Online Ordering\Ordering Setup Scenarios. If further information is needed regarding Employee Management [Permissions], reference the following document under SMART Releases\v17.1\Support\Employee Management\Employee Management doco. Otherwise, contact your Regional Support Center for further assistance.

Edits for setup of approval

If routing and approvals are being used, the software has a few checks in place to make sure information is not lost.

*Issue: Approvers not Setup*

*Order Requisition Entry*

Please correct the following errors or else this page will NOT save.

*Cannot route until Supervisor permissions are setup. Please contact your district office to correct this problem so you can route this requisition.*

*Solution: To correct this problem, doublecheck that Setup Permissions was completed and approvers are built in the Setup Approvers window in SMART HR.*
**Issue:** Employees not setup or hooked to their supervisor

**Solution:** To correct this problem, doublecheck that an assignment row was setup and that they are setup in the **Employee Hierarchy** window in SMART HR.

**Issue:** Cannot find an Approver at all

"Could not route to an approver. Please contact your district office to correct this problem so you can route this requisition."

**Solution:** To correct this problem, doublecheck that **Setup Permissions** was completed and approvers are built in the **Setup Approvers** window in SMART HR.

**Issue:** Final approval warning for audit purposes

**Solution:** This is a setting for internal control purposes. Make sure to have one person enter the requisition and another person approve it.

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**How to Start an Order**

1. Log onto the SMART eR website.
2. Enter your User ID and password.
3. Click on Login.
4. From the SMART eR menu, click on the **plus** button next to **Requests**.
5. If you desire to order from a vendor’s webstore, click on **Ordering** and find the doco section “**Ordering (with Online Vendors)**”.
6. If you desire to enter a requisition for items to be ordered, click on **Order Requisition Entry** and continue with the document.

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**Order Requisition Entry**

This page allows the user to create an electronic order request form for any active and viewable vendor in your district’s customized list of SMART Finance vendors. Depending upon your security access, the SKU field, account code field and period field may not be visible. A requisition will be in pending status until the creator routes it for processing. If these fields are NOT filled in, it will change to a Proof status until an employee with a higher security access completes it. Once these fields are filled in the requisition will change to an open status. At an open status, the requisition can continue through the SMART eR approval process or be transferred to a purchase order depending on the district’s setup.

**Current Requisitions tab**

This tab will display active in process requisitions at a pending, proof and open status. It will list requisitions in the requisition record number order and be filtered per your login User ID. If additional rights are
permitted and the requisition approval process is not set, the page will automatically display requisitions built by this user and any user that needs proofing (Status = Proof). This tab will provide access to create a new requisition, edit an existing requisition or change the status on the requisition.

### Order Requisition Entry

<table>
<thead>
<tr>
<th>Req #</th>
<th>Vendor Name</th>
<th>Created By</th>
<th>Required</th>
<th>Status</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>1067</td>
<td>AAA FOUNDATION FOR TRAFFIC</td>
<td>DONALD S. PARRISH - 57</td>
<td>08/04/2017</td>
<td>Open</td>
<td>R</td>
</tr>
<tr>
<td>1066</td>
<td>M &amp; J PROMOTIONS</td>
<td>DONALD S. PARRISH - 57</td>
<td>08/04/2017</td>
<td>Pending</td>
<td>R</td>
</tr>
<tr>
<td>1065</td>
<td>ABLE NET INC.</td>
<td>DONALD S. PARRISH - 57</td>
<td>08/04/2017</td>
<td>Open</td>
<td>R</td>
</tr>
<tr>
<td>1034</td>
<td>4INKETS</td>
<td>MARJORIE L. BALLARD - 143</td>
<td>07/28/2017</td>
<td>Proof</td>
<td>R</td>
</tr>
</tbody>
</table>

- **To Edit an existing requisition:** Click on the **Edit** button to edit an existing requisition. Information will follow on the data fields to be entered.

- **To change the Sort:** By default, both tabs will sort by Requisition Number. To change the sort temporarily, click on the blue underlined column heading. *For example, if you want to change the sort to Vendor Name, click on the column heading. The column will be resorted.* Click on the menu item **Requests|Order Requisition Entry** to ‘reset’ the sort.

- **To Add a new requisition:** Click on the **Add New** button to start a new requisition. The detailed instructions will follow under the section titled ‘To Add a New Requisition Record’.

- **To View a processing requisition:** Click on the **View** button to list the information about the request after it has been routed for approval and processing. Click on **OK** to the open request.

In the case where approval is not set, a user may notice the ‘**All Open Reqs**’ option at the top of the list. If checked, this will display all open requisitions and allow the user to edit them prior to transferring them to a purchase order record in SMART Finance.
To Add a New Requisition record

1. From the Current Requisition tab, if no orders have been created yet, the page will open ready to enter a requisition. If you are searching for an existing requisition, then click Cancel to go back to the existing requisition list.

2. Click Add New to add a new requisition. Fields with a colored background need to be entered before it will save.

**NOTE:** The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

A. **Date Required** will be pre-populated with today’s date. Another date can be keyed or selected from the drop-down calendar. This should be the date the order is preferred by.

B. **Ship to Location** is a required field. It will automatically pre-populate with the user’s assigned shipto location (if setup in SMART HR) or one can be selected from the drop-down list.

C. **Comment** is optional for entry. Suggestion is to use this as an ATTN line or information for the Business Office. This line appears directly below the Ship-To Address information on the PO.

D. **Vendor Notes** is optional for entry. Enter any comments for the vendor that may be necessary. The Vendor Notes would be used for any information that the user would like printed on a Purchase Order in SMART Finance. Start typing a portion of an autocomment for a short autocomment to appear, if known. This field is limited to 150 characters. For longer autocommants, use the Add/Maintain Notes button.

E. **Vendor Code** is a required field. Start typing a portion of the vendor name and scroll to the appropriate vendor for selection.

F. **Alt Address** - If there is an alternate vendor address, enter the Address Code or select from the list.

G. **Buyer** is a required field. It will automatically pre-populate with the user’s assigned buyer (if setup in SMART HR) or can be selected from the drop-down list.

H. Click Save.

I. **Add/Maintain Notes** – Optional. This allows a note and/or a file attachment that may assist with processing the requisition.
   a) Click on the Add/Maintain Notes button. The system will bring up the Notes page.
b) Click on the Add New button.

c) Enter in a description for this note. This is a required field.

d) Click the Browse if adding a file attachment. Follow the prompts to select the file and attach.

e) The Note area is for typing any other information that would help with processing this requisition.

f) The plus button to the left of the note area, can be clicked to access any SF autocomments [All documents, requisition and purchase order].

   a. The autocomments selected will appear.

   b. Highlight a row and click the Insert button to select the autocomment to populate the Note area.

   g) The Note area can be expanded for view by dragging the lower left corner of the Note area in some browsers.
h) Click the **Save** button when finished making changes.

![Notes](image)

i) To add another note or attachment click on **Add New** button and repeat this process.

j) If complete, click on the **Go Back** button to exit the Notes page and return to the **Order Requisition Entry** page.

3. Click on the **Save** button to save the vendor information and enter the detail of the requisition.

![Order Requisition Entry](image)

**NOTE:** The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

A. On the Detail section, enter in a **SKU code** if the field is displayed. This is optional field for entry with a pending status requisition.

B. In the **Item#/Description field**, enter the catalog number and the item description.

C. Enter the number of **Units**.

D. **U. Type:** Unit Type will default to EA. Change it if necessary.

E. Enter the **Rate**. For more information about what is allowed in this field, place your cursor over the Rate column heading.

F. Enter a **Discount** if needed. The field allows up to 7 digits such as 00.0000% or 000.000% if needed.

G. The system will automatically calculate the **Total Cost** per row and the **Requistion Total**.

H. Enter an **Account Code** if known. This is an optional field for entry. Do not enter anything other than numbers or else the window will give you an invalid format error. The user’s default will autopopulate (if setup in SMART HR). Otherwise, begin by keying in the fund. The first 5 relevant account codes in the user’s permission range will be listed (or less if they don’t have access to 5 codes). As you key more, the list will be refined.

a) To distribute an account code among various account code, click the ‘Dist’ button near the start of the add/save row button.

![Add/Save Row](image)

b) This will bring up the Requisition Distribution page.

c) On the Add/Save Row, either distribute by a percentage and by the amount and enter an account code. Click on the Add/Save Row button to save the distribution row.
d) Repeat the process of adding and saving a row until the Remaining Balance is 0.00.

e) Click the Go Back button at the top left to return to the Requisition Entry page. The Distributed rows will auto appear at the bottom half of the Requisition Entry page and the Dist button now will highlight in blue to indicate there are distribution rows.

I. If displayed: The **period** should default in based on the **Date Required** entered previously.

J. **Ship to Location** – will be set to user’s default (if setup in SMART HR). Otherwise, select one from the drop-down list.

K. **Change reason** – this field is available to PO/POADMIN users to make a note on a detail line about why they might be altering a row so the original requester can see why or what happened.

L. **Detail Comments** is optional for entry. Enter any comments necessary for this row by clicking on the plus button to the right of the **Add/Save row** button. These detailed comments will print on the Purchase Order form.

4. Click on the **Save** button to save the detail of the requisition. The saved row will move to the bottom portion of the web page and highlight in yellow to indicate it is overbudget. If another row of detail is needed, enter the data on the **Add/Save Row** line. Continue to add rows as needed.

5. When finished adding detail rows, click the **Save** button at the top of the page to return back to the list of requisitions under the Current Requisition tab.

6. The requisitions can be edited as many times as needed in pending mode. Click on the **Route** button if you are finished with the requisition to send it to be proofed and processed.
7. A warning message will appear:

![Warning Message]

8. Click **Ok** to continue, or **Cancel** to go back to the list.

**NOTE:** If a person has more than one supervisor OR if a supervisor is in charge of more than one building, a message will open asking the user to choose which one to route to:

![Approver Select]

9. The order will move to either a Proof or Open Status for further processing and will only be viewable from that point forward (unless you have additional credentials that allow for proofing or approval and are not using routing and approvals).

![Order Status]

**NOTE:** For someone with additional credentials and NOT using approvals, the list will display your own requisitions as well as anything in a Proof status.
Once they are in an Open status, they will not show in the listing. If for some reason, they need to be accessed – click on the checkbox next to All Open Reqs. That will include them in the listing. They will not be in the list if they include some/all transferred requisition detail lines.

If there are no requisitions to proof or you have not entered any, it will look like the following:

10. If you wish to place another order, repeat the above steps. Otherwise click the Logout link in the top right corner under your logged in name.

11. If using Approvals *(and if they have an email setup in SMART HR)*, a notification will be sent overnight to tell them they have something to approve in case they didn’t see it in SMART eR.

**To Edit an Existing Requisition**

1. From the Current Requisition tab, click Edit to edit a requisition.
2. This will bring up the Order Requisition Entry page. If changes are needed at the top portion of the requisition such as date, vendor, comments, etc., then make and change and click the Save button near the Cancel button.

3. If further changes need to be made with the detail rows, click the Edit button to the right of the detail row. Click Save to save the changes.

4. If the detail row is no longer needed, click the Delete button to remove this detail row.

5. When finished with the changes, click the Save button at the top left of the Requisition page to return to the Requisition list on the Current Requisitions tab.

**To Close a Requisition**

1. In the case where approval is not used, there is an option to set a requisition to a ‘Closed’ Status. This will set the status of the requisition to a closed status and the requisition will not move further in the process.
2. From the Status field click on the arrow and select Closed. Click the Save button in the top left to save this change.

3. To view this closed status requisition, continue on to the next section.

**Past Requisitions tab**

If there are existing closed requisitions, they will be listed under the Past Requisitions tab. These are filtered per your login user ID. This screen is used for reference and to copy a closed status requisition.

**NOTE:** Online Orders through a webstore vendor will not be able to be copied due to changes on their sites and they way they are processed online.

**To View a Closed Status Requisition**

Based on the filter options at the top of the screen, find the appropriate requisition(s). To the left of the requisition to be viewed, click on the plus button. This will expand the detail on the Requisition.
To Copy a Closed Status Requisition

Based on the filter options at the top of the screen, find the appropriate requisition to copy. Click on the Copy button. The Copy button will not be available for Web or Web Express type orders.

![Image of requisition entry window]

This will auto bring up the Order Requisition Entry window, prefilled with the copied data for the current date. The system will edit the data to verify it is still active for the period. Make changes as needed and save.

Ordering (with Online Vendors)

1. Click on Requests | Ordering. The online vendors a district can choose from today include: Corporate Express (Staples), Innovative Office Solutions, Office Max, School Specialty, Frey Scientific, Classroom Direct, Broadhead Garrett, Hammond & Stephens, Follett, Office Depot, Lakeshore Learning and Express.

2. Click on the Shop button next to the Vendor you want from the list. (Regions will automatically set up all vendors in the list that the district chooses.)
3. The new website will open in a new window or tab.

NOTE: You may get a warning depending on your browSMART eR and security settings. For example:

Click on the options button and allow pop-ups. Re-click on the shop button for the vendor you want.

4. Shop for items needed and click on Add to Cart. (The following steps may differ depending on the vendors’ webstore setup.)

5. When everything is in the cart and you are done, check to see if you are still logged into SMART eR and haven’t timed out.
If you are logged in, click Checkout.

If you have timed out, re-login into SMART eR. (This allows users placing large orders the ability to shop as long as they need and not worry about losing their order).

Checking out with Express is different than all of the other vendors:

For an individual site, all items will be processed at once and look similar to the following. Click on the plus button to see individual items after all required fields are entered. (Skip to Step 9 for more information about what to enter in fields):

6. From Express - once you have checked out, you will then receive a summary window in SMART eR showing the items ordered.
7. For Express, it now includes Vendor Name, as the orders will need to be split into one for each vendor when transferred for routing or finishing (This needs to be setup prior to ordering in SMART Finance-Vendor window). They will also be placed back as separate orders. If they will all get the same information entered in to transfer, the Check All button will select all items to transfer, or they can be done in batches as chosen.

8. Then click on Begin Transfer.

If multiple vendors are included, then an error message will appear:

![Error message]

If it is successful, additional fields will open and data can be entered:

![Ordering Checkout]

**NOTE:** The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

9. Within the Ordering Checkout window, the following fields can be entered prior to Transfer.
   a) **Date Required** – defaults in as today.
   b) **Ship to Location** - required; defaults in if setup to the user *(in SMART HR).*
   c) **Comments** – Optional for entry. This field is for any additional information that may be needed to process the order. *Such as a specific grant that is to be used for coding or perhaps a specific site should be charged for the items, etc.*
d) **Vendor Notes** – Optional for entry. This field is for any additional information that may be needed to process the order to the vendor.

e) **SKU Code** – *This field may not be visible depending on your permission level.* Enter in a value from the list.

f) **Ledger Type** – defaults to E, but can be changed.

g) **Account Code** – Optional if account code is known

h) **Buyer** – This allows one file attachment that may assist with processing the order.

**NOTE:** The headings in red have a hover feature available. Place your cursor on the wording and it will provide more information.

10. Click on **Transfer** button. This will transfer the order in a requisition for final proofing. **NOTE:** *Your order will not be finished unless you do this step!*

11. Click on **Save** after reviewing the order. If the Save is successful, it will close the page and return you back to the original window. If there is a problem with your order, the window WILL NOT close. It will provide a list of errors for you to see and correct.

12. Click on the **Route** button if you are finished with the order to send it to be proofed and processed.
13. A warning message will appear:

![Warning Message](image)

14. Click **Ok** to continue, or **Cancel** to go back to the list.

15. The order will move to either a Proof or Open Status for further processing and will only be viewable from that point forward *(unless you have additional credentials that allow for proofing or approval).*

![Order Requisition Entry](image)

16. If you wish to place another order, repeat the above steps. Otherwise click the **Logout** link in the top right corner under your logged in name.

17. For Express – Click on the **Order Checkout** link, then repeat steps 1-15 to place your next order. If you are finished, there will be no Order Checkout link showing.

![Order Requisition Entry](image)

18. If using Approvals *(and if they have an email setup in SMART HR)*, a notification will be sent overnight to tell them they have something to approve in case they didn’t see it in SMART eR.

```
Requisitions are ready for approval.

Requisitions were entered and need to be approved. Please log into SMART eR to Responsibilities | Approvals to process them.

This is a non-monitored email account. Please do not reply to this account.
```

**Approvals**

This page is used if routing Order Requisitions for approval. If not doing that, this page can be skipped.

Based on permissions and approver setup, each requisition that requires approval will be routed to a person authorized to approve. The person can then either approve or deny the requisition. With the requisition
approval, there is an option to enforce overbudget controls. The requisition will then require approval for the record and for any overbudget detail lines within the record.

**Pending tab**

This tab will display any in process (status = proof) requisitions that may need to be edited for the requisition data or approved. If nothing is there to approve, it will say “No Records Found” otherwise a list of requisition(s) will appear.

If there is data, it can be filtered down to search out a specific record. The top portion of the page has the options to filter the requisition records.

1. **Filter options:**
   a. **Approval Filter:** This will only display for POADMIN user rights. It will default to Mine: which is the items that are specific to the user that need to be approved or they are the next in line. An override options will also display for anyone with POADMIN rights; however, the system only allows the final POADMIN on the route slip to take anything in the approval process, even if it hasn’t completed the approval process.

   **NOTE:** If using POADMIN rights with the highest Org flag in the approval process, another POADMIN will not naturally be included in the route slip (and not see anything if Override is chosen). To override someone in a highest Org position, they will have to have Proxy rights to the highest Org approver to access their information.

   b. **Created by:** This is an optional filter that will limit by the person who created the requisition.
c. **Vendor name**: This is an optional filter that will limit by

d. **Required from Date**: This is a required filter that will limit to 6 months back. This can be changed as desired.

e. **Required through Date**: This is a required filter that will limit to today. This can be changed as desired.

*If date ranges are changed, click on the Search by Date Range button to get the new desired result.*

2. If approvals have already been done prior, they will display below the line if the button under the column **Previous Approvals** is clicked. To hide it again, click the button.

3. If someone has designated you as a proxy, an additional drop-down list will appear: **View Proxy Approvals**. It will default to No, which will not bring in Proxy requisitions.

Change the selection to Yes. This will display another filter option: **Route ID** which allows a specific approver to be chosen and filters to their approval requisitions only. The list will only display information if there is something that needs approval.
4. To view the requisition, click on the View icon on the row desired. This will open the requisition, but not allow deleting or blanking out required fields. If a line item is not allowed/desired, enter 0 in the quantity field.

**NOTE:** If the setting in SMART Finance (application default – intray requirement to view item= Yes) is set to require a person to view the requisition, the approve and deny checkboxes will not be saved until after that has been done. The following error message will appear:

5. Change anything that needs to be fixed. If a change is made to an item, it may be helpful to save a change reason at the end of the row. That will display to the original requester and may help to eliminate questions about why their original requisition was altered.
NOTE: A requisition needs to be at an Open status in order to approve it and route it on to the next person or to become a Purchase order. If it is not, when the first person tries to approve it, the following message will display:

* This requisition cannot be approved because it is not at an open status. Please edit the req and make corrections to change the status.

6. After making any necessary changes, click on the Save button to return back to the Approvals window.

7. Approve/Deny checkboxes: It can now be either approved or denied by checking the appropriate box. It can also wait if something needs to be checked or additional research is needed to approve the requisition.

   NOTE: If a requisition is denied, an email similar to the following will go to the original requester. Also, all approval rows following that approver will be set to Deny with the original approvers id for reference and the requisition will be changed to a closed status.

   Your Requisition 1010 was rejected

   Your Requisition 1010 has been cancelled through the approval process. The comments posted on the cancellation are: No comment was entered to explain the reason. To restart the process, please enter a new requisition request or copy a past requisition.

   If it is approved and another person is next for routing, they will also get a nightly prompt that they need to do something:

   Ordering Requisitions are ready for approval.

   Requisitions were entered and you are next to approve them. Please log into SMART eR to Responsibilities | Approvals to process them.

   This is a non-monitored email account. Please do not reply to this account.

8. Comments: enter in any approval comment that may be helpful to the original requester or the next approver. This is optional.

9. Status: this is the Order Requisition’s status. A status of Open can be approved, but a status of Proof must be fixed until it changes to an open status to approve.

10. Click on the Save Decisions button to save the approval choice.
NOTE: If overbudget enforcement is on and a requisition has any unapproved detail lines, an additional message will display:

**Approvals**

- You are required to view the marked reqs before saving changes.
- You cannot approve over budget items, the items need to be changed or overridden.

*See the section on OverBudget Controls in order to process a requisition with this setting.*

**OverBudget Controls**

The system has the capability to produce a warning or fatal error if the budget for an account code is exceeded. The system default is a warning error with yellow highlighting. An option to enforce Overbudget Controls [via SMART Finance] can be added as another level of approval for the requisition. The final approver will have rights to approve any overbudget requisitions. If using this option with requisition approval, the overbudget approval can be done one of two ways:

1) Via the SMART eR Approvals page, review the requisition for detail lines that may be overbudget. Make adjustments to the requisition record or via SMART Finance adjust the budget monies. When ready to approve the requisition, check the Approve or Deny checkbox along with the OverBudget Approval checkbox and then click on the Save Decisions button.

2) Via SMART Finance|Purchase Order menu|Requisition Budget Approval window. If approving via SMART Finance, the user needs to be setup as an OverBudget approver. This can be assigned under Administration|Access|User|Approval Funcations. **NOTE:** If you had rights to approve overbudget records prior to this release, it will continue to function as you have done in the past.

Once the requisition has routed to the final approver, the record(s) will appear in the Requisition Budget Approval window for any detail rows that are considered overbudget. It is optional but you can click on the detail button to view the Requisition or click on the Account Analysis button to review the budget amount. Changes can be made to the budget monies within SMART Finance; otherwise, if changes have to be made to the requisition, this needs to be done via SMARTeR.
1. Click the **Budget Apprv** checkbox to override the overbudget amount for the requisition detail row(s). This will mark the detail line(s) as Budget approved and set the requisition for OverBudget approval to an approved status.

2. Log into SMART eR to finish the approval process to approve the requisition record. Navigate to Responsibilities|Approvals. This will list the requisition record, but note the OverBudget Approval column will not have a checkbox since this was completed on Finance. **Approve or Deny** the requisition record, enter a **Comment** if desired and click the **Save Decisions** button.

### Approved tab/Denied tab

These tabs will display Requisitions that have been approved or denied. Both of these tabs function the same way…

1. If nothing has been approved/denied for an approver, it will say “No Records Found”.

---

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2. Filter options:
   a. **Created by**: This is an optional filter that will limit by the person who created the requisition.
   b. **Vendor name**: This is an optional filter that will limit by
   c. **Required from Date**: This is a required filter that will limit to 6 months back. This can be changed as desired.
   d. **Required through Date**: This is a required filter that will limit to today. This can be changed as desired.
   
   *If date ranges are changed, click on the Search by Date Range button to get the new desired result.*

3. If approvals have already been done prior, they will display below the line if the button under the column **Previous Approvals** is clicked. To hide it again, click the .

### Order Requisition Transfer (to SMART Finance)

This procedure can only be completed by a person with a POADMIN level role. This step will create the purchase order record on SMART Finance. Requisition records will be able to be selected in this window if they are at an open and approved status.

1. From the SMART eR menu, click on **Responsibilities**.
2. Then click on **Order Requisition Transfer**.

   *NOTE: If there is no vendor listed, there is nothing to be transferred. It will look similar to the following:*

3. It is optional to select a filter option of Buyer, Location or Employee. Otherwise, under the **Vendor** field, select a vendor from the list. If there are multiple entries for the same vendor but different periods, the system will provide a prompt to select the period. Otherwise the period will auto fill.
4. If needed, enter any other filter options and click the **Filter** button.

5. Once the requisition row or rows appears, **Check** those that need to be grouped on one purchase order record.

**NOTE:** For vendors that have multiple types, they cannot be combined and the page will not allow it to transfer.

6. Click the **Transfer** button at the top left of the requisition list. The **Transfer Options** box appears.

7. The system will default to a New Purchase Order.
   
a) If allowed, selecting **Existing Purchase Order** groups the requisition item(s) with an existing purchase order (*this is not allowed for webstore vendor orders*).

   b) A list of the existing Purchase Orders for this vendor will appear.

   c) In order to transfer the checked requisition row(s) to this existing purchase order, check the box to the left of the PO number. *In the example below, the requisition row(s) will be going to PO number 18776.*

   d) Click the **Continue Transfer** button.

8. On a new Purchase Order, change the **buyer** if needed.

9. Click on the **Continue Transfer** button to finish the transfer.

10. A notification will be sent to the creator of the Order Requistion with an update on their order. It will include three sections including: which items are transferred to a PO, which items are denied,
and which items are still waiting to process. Once a notification is sent about an item, it will not be sent again.

**Sample notification:**

![A purchase order was created for your Requisition 1037](image)

The following items were added to purchase order #18771

<table>
<thead>
<tr>
<th>Req No</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Type</th>
<th>Unit Price</th>
<th>Discount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1037</td>
<td>MODEL XYZ</td>
<td>2.0000000</td>
<td>EA</td>
<td>104.540000</td>
<td>0.000000</td>
<td>209.08</td>
</tr>
<tr>
<td>1037</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>20.000000</td>
<td>0.000000</td>
<td>20.00</td>
</tr>
<tr>
<td>1037</td>
<td>good</td>
<td>2.0000000</td>
<td>EA</td>
<td>104.540000</td>
<td>0.000000</td>
<td>209.08</td>
</tr>
<tr>
<td></td>
<td><strong>Total Cost</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>$438.16</strong></td>
</tr>
</tbody>
</table>

The following items still need to be processed

<table>
<thead>
<tr>
<th>Req No</th>
<th>Description</th>
<th>Quantity</th>
<th>Unit Type</th>
<th>Unit Price</th>
<th>Discount</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1038</td>
<td>model test on env</td>
<td>50.00000</td>
<td>EA</td>
<td>104.720000</td>
<td>0.000000</td>
<td>5236.00</td>
</tr>
<tr>
<td>1036</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>23.000000</td>
<td>0.000000</td>
<td>23.00</td>
</tr>
<tr>
<td>1035</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>34.000000</td>
<td>0.000000</td>
<td>34.00</td>
</tr>
<tr>
<td>1034</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>222.000000</td>
<td>0.000000</td>
<td>222.00</td>
</tr>
<tr>
<td>1033</td>
<td>Misc</td>
<td>2.0000000</td>
<td>EA</td>
<td>60.320000</td>
<td>0.000000</td>
<td>120.64</td>
</tr>
<tr>
<td>1030</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>22.000000</td>
<td>0.000000</td>
<td>22.00</td>
</tr>
<tr>
<td>1026</td>
<td>Misc</td>
<td>2.0000000</td>
<td>EA</td>
<td>12.000000</td>
<td>0.000000</td>
<td>24.00</td>
</tr>
<tr>
<td>1026</td>
<td>Misc</td>
<td>2.0000000</td>
<td>EA</td>
<td>104.770000</td>
<td>0.000000</td>
<td>209.54</td>
</tr>
<tr>
<td>1016</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>65.320000</td>
<td>0.000000</td>
<td>65.32</td>
</tr>
<tr>
<td>1008</td>
<td>Misc</td>
<td>2.0000000</td>
<td>EA</td>
<td>105.650000</td>
<td>0.000000</td>
<td>211.30</td>
</tr>
<tr>
<td>1008</td>
<td>Misc</td>
<td>50.000000</td>
<td>EA</td>
<td>104.540000</td>
<td>0.000000</td>
<td>5270.00</td>
</tr>
<tr>
<td>1008</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>104.720000</td>
<td>0.000000</td>
<td>104.72</td>
</tr>
<tr>
<td>1008</td>
<td>Misc</td>
<td>20.000000</td>
<td>EA</td>
<td>105.650000</td>
<td>0.000000</td>
<td>2113.00</td>
</tr>
<tr>
<td>1005</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>50.210000</td>
<td>0.000000</td>
<td>50.21</td>
</tr>
<tr>
<td>1004</td>
<td>Misc</td>
<td>1.0000000</td>
<td>EA</td>
<td>60.320000</td>
<td>0.000000</td>
<td>60.32</td>
</tr>
<tr>
<td>1004</td>
<td>Misc</td>
<td>22.000000</td>
<td>EA</td>
<td>134.000000</td>
<td>0.000000</td>
<td>2948.00</td>
</tr>
<tr>
<td></td>
<td><strong>Total Cost</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td><strong>$62078.92</strong></td>
</tr>
</tbody>
</table>

*This is a non-monitored email account. Please do not reply to this account.*

**Place Orders (to the Vendor)**

This step can be performed by a person with POADMIN rights after the purchase order has been routed and approved for purchase within SMART Finance. This process will send the purchase order data to the webstore vendor for fulfillment of the ordered items.

1. Under **Responsibilities**, click on **Place Order**.
2. A list of Approved/Not In route/Unprinted Purchase Orders will appear.
NOTE: If the purchase order has been printed, it will not appear on this screen. The reason for this is to avoid doubling the order. If the order has been printed, it may have already been sent/faxed to the company.

a) If the order was printed but it needs to be submitted electronically, click on Logout of SMART eR in the top right corner under the logged in name.

b) Go into SMART Finance|Purchase Orders|Purchase Order Summary.

c) Input the Purchase Order number or select to look by the Status of Open, PO Date, and PO Type of Web.

d) Click Find. Click Detail on the appropriate item.

e) Deselect the Printed box and Save.

f) Sign back into SMARTeR, go to the Place Order page and it will now appear in the list.

3. To see the detail of the purchase order, click on the plus button.

4. Click on the “Transfer” button in front of the purchase orders that should be sent to the vendor.

5. A message will only appear if your order does NOT transfer successfully.

6. If finished, click on Logout of SMART eR in the top right corner under the logged in name.

7. An Email will be auto generated to the employee that is on the purchase order being sent. (Only if they have entered their work email address in SMART HR - SHR|Payroll|Employee Information|Employee Info|Supp Info tab or SMART eR|Home|My Information|About Me|Employee Information).

NOTE: A good return address is needed for the auto-generated email or it will get filtered into most people’s junk email folder. A custom setting will need to be changed by the Regional Centers, so please contact them for assistance if this process has never been used before.
NOTE: Alpha 2 defaults in as: email_address@your_domain. You need to change this field to something that makes sense to the district; otherwise, it will cause the emails to get filtered out or put into a bulk/SPAM folder. There is a non-monitored email disclaimer that will get put on the bottom of every automatic email message – if you want to change what is there: it is stored in alpha 3.

Setup Proxies

This page is used for short-term proxies, like someone going on vacation, on leave, out sick for multiple days, etc. This window can be used to set up someone to have access to a different approver’s “user requisitions” for a specified timeframe.

If no proxies have been setup, it will open with an option to Add New.

1. Click on the Add New button.

   POADMIN will see:

   PO will see:

   ![Setup Proxies Interface]

   Someone with a xxADMIN role will have the option to be a proxy for anything in that project. For example, POADMIN can be a proxy for someone with a PO or POADMIN role, but PO can only be a proxy for another PO role.

2. Fill in any missing fields or change anything in the fields.
   a. Proxy for ID: This will default to the person logged in unless xxADMIN rights. In that case, it will become a drop-down list of people to be setup (for example, a person could call in and say they are out sick for the next 3 days; a POADMIN person has the ability to setup a proxy for anyone.)
   b. Project: What items is the proxy being setup for?
   c. Role: This is the current role are you looking to assign.
   d. ID: This is the ID of the person who is going to be the proxy.

   NOTE: If the Proxy for ID is originally a POADMIN, then only ids that have POADMIN is allowed to be a proxy and will display in the list.

   e. Start Date: This is the date to start being a proxy.
   f. Stop Date: This is the last date the proxy should have access to another approver’s users. If unsure, we recommend using the end of the school year as it can be changed later.
3. Click on the **Save** button when finished making changes.

4. A notification will be sent (triggered every hour) to the person that is being requested as a proxy to let them know.

   ![Image of proxy setup notification]

   *This is a non-monitored email account. Please do not reply to this account.*

   If the proxy is setup for someone other than the person logged in, both the person and the requested proxy person will be sent notifications.

   ![Image of proxy notification]

   *This is a non-monitored email account. Please do not reply to this account.*

5. It will return to the list of proxies available for the user logged in, or for the entire district if logged in as POADMIN rights.

   ![Image of proxy setup list]

**Reports**

These reports are available to PO/POADMIN user rights and located under the Reports menu on SMART eR.

- **Purchase Ord Detail**: This report will list in the detail information about the purchase order. It is sorted by purchase order record number.

- **Purch Ord Detail by Ven Name**: This report will list in the detail information about the purchase order. It is sorted by vendor name.

- **Requisition Detail Summ**: This report will list in the detail information about the requisition. It is sorted by requisition record number. *(a limited version of this is also available to general users when they click the View button on the Order Requisition Entry page for their specific requisition).*

- **New**: **Account Analysis**: This page allows you to view information on account codes, such as the starting balance, activity, ending balance, budget amount, encumbrances, and budget balance. From this screen, you can “drill down” to view more detailed activity.
Optional Setup/Customization

Setup Database Maintenance

This section covers the settings for the shopping database maintenance found under the Other>Setup Database Maint menu item. This setting will remove any previously saved pending status requisitions from the database. The default setting is 14 days (this can be changed by the district if desired). If the process finds a pending status requisition older than the 14 days time frame, it will delete the following:

- Any associated notes that have been added to the requisition [sfnotes]
- Any associated Vendor Notes that have to added to the requisition [comments]
- Any detail records associated with this requisition [reqdet]
- The main requisition record [req]
- Any webstore order that did not get saved to a requisition record [potemp_express]

<table>
<thead>
<tr>
<th>Days</th>
<th>Code</th>
<th>Date Created</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Shopping</td>
<td>11/07/2012</td>
<td>Previously saved requisitions with a pending status are automatically deleted by the system after the set time period. Default setting is to delete any pending status requisitions older than 2 weeks.</td>
</tr>
</tbody>
</table>

Notifications

Notifications are a tool used to send information to users as activity happens in SMART eR. All districts are provided with the same options; however, each district, as well as the employees, can customize them per their preference. The following sections will explain what employees can change and what districts can do.

Notification Setup (Employee)

This page allows a user to decide whether they are sent emails, notifications or both from certain pages in SMART eR. This can be set differently from the district if they allow it. This is for notifications for SMART eR entirely, not just for the Ordering section.

My Notifications tab
1. **Delete** – this will remove the entire setting per this user so nothing will happen.

2. **Notification Options**: To change the type of notification provided, choose one from the list:
   a. **None** – no notifications will be sent for this option.
   b. **Notifications** – An entry will be logged in the Home page, under the Notifications section.
   c. **Email** – an email will be sent to the email address the user selected according to their preference.
   d. **Both** – an entry will be logged in the Notification section and an email will be sent.
   e. To mass set the list, the buttons at the top of the column can be used instead of clicking on each individually. *Items can still be changed individually after that if needed.*

3. **Frequency Options**: To change the frequency of notification provided, choose one from the list:
   a. **Instant** – This will generate emails immediately as they are identified by the system.
   b. **Hourly** – This will group certain emails, so there will only be one sent per hour instead of potentially a lot. *For example, if there is something that needs to be addressed, it could only send a reminder once an hour instead of everytime the system finds assigned to you.*
c. **Daily** – This will group certain emails, so there will only be one sent at night instead of potentially a lot. *For example, if there is something that needs approval, it would only send a reminder once at night for a next day reminder, instead of everytime a user submits one.*

d. To mass set the list, the buttons at the top of the column can be used instead of clicking on each individually. *Items can still be changed individually after that if needed.*

**Setup Notifications tab**
This tab is currently not used.

**Emp Notification Defaults**
This page allows a higher access user to decide whether they want information sent as emails, notifications or both from certain pages in SMART eR. This is found under the menu group **Other** *(and a user would need the role = Setup).* *This is for notifications for SMART eR entirely, not just for the Ordering section.*

**Current Defaults tab**

1. **Delete** – this will remove the entire setting per this user so nothing will happen.

2. **Notification Options**: To change the type of notification provided, choose one from the list:
   a. **None** – no notifications will be sent for this option.
   b. **Notifications** – An entry will be logged in the Home page, under the Notifications section.
c. **Email** – an email will be sent to the email address the user selected according to their preference.

d. **Both** – an entry will be logged in the Notification section and an email will be sent.

e. To mass set the list, the buttons at the top of the column can be used instead of clicking on each individually. *Items can still be changed individually after that if needed.*

3. **Disable Notification Editing:** This will not allow a general employee to be able to change the type of notification sent. *In most cases, we probably would not recommend using this.*

4. **Frequency Options:** To change the frequency of notification provided, choose one from the list:

   a. **Instant** – This will generate emails immediately as they are identified by the system.

   b. **Hourly** – This will group certain emails, so there will only be one sent per hour instead of potentially a lot. *For example, if there is something that needs to be addressed, it could only send a reminder once an hour instead of everytime the system finds assigned to you.*

   c. **Daily** – This will group certain emails, so there will only be one sent at night instead of potentially a lot. *For example, if there is something that needs approval, it would only send a reminder once at night for a next day reminder, instead of everytime a user submits one.*

   d. To mass set the list, the buttons at the top of the column can be used instead of clicking on each individually. *Items can still be changed individually after that if needed.*

5. **Disable Frequency Editing:** This will not allow a general employee to be able to change the frequency of the notification sent. *In most cases, we probably would not recommend using this.*

6. **Disable Deleting:** This will not allow a general employee to be able to delete a notification sent.

*Setup Defaults tab*

This tab is currently not used.

**Emp Notification Messages**

This page allows a higher access user to decide whether they want to customize the content of the notifications sent as emails, notifications or both from certain pages in SMART eR. This is found under the menu group **Other** *(and a user would need the role = Setup).* *This is for notifications for SMART eR entirely, not just for the Ordering section.*
The notifications that can be edited are grouped per page. All sections are setup the same way.  

**NOTE:** in some cases SMART eR sends emails that cannot be customized; therefore, they are not listed here. For example, notifications required if certain W4s are submitted and a heads-up is being sent to a Payroll person.

1. Click on the **plus** button to the right of the page to see a list of options.

2. Click on the **Edit** button to see or change the message.

3. The **Subject** and **Message** are editable. *If there is information in a parenthesis please do not change it as it is a reference to pull out data from the database for the user. Also, please do not use parenthesis in your message as that is a signal for the software to look for a value somewhere.*
4. Click on the **Save** button when finished or the **Cancel** button to return to the previous page.