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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: *Amazon, Corporate Express (Staples), Innovative Office Solutions, 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 Shopping 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.

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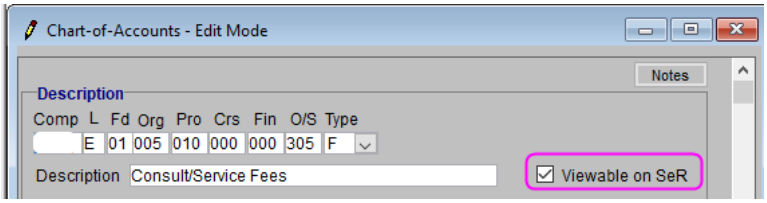
- Setting approval hierarchy with automation of route levels and approvers.
- Ability to give temporary access to another approver while out on leave.
- For ease of quick entry, a user will only see key fields. At a higher security level, fields required for entry will be available to complete the requisition.
- Electronic notification of order status within the requisition and purchase order process for original requester as well as approvers.
- Ability for users to access SMART eR 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

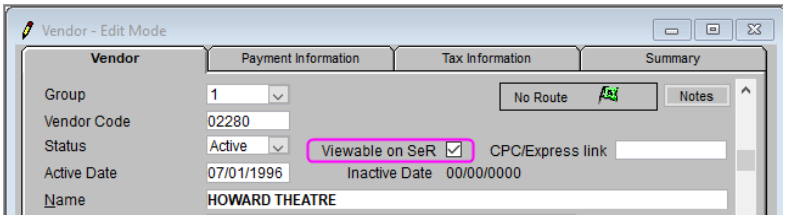
Below are settings to be considered when using the SMART eR ordering process.

Viewable Vendor and Account Codes

There is a checkbox to denote whether a vendor or account code should be viewable on SMART eR. It can be set via *SMART Finance | GL | Chart of Accounts Setup | Chart of Accounts*. If the 'Viewable on SMART eR' checkbox is checked, this account code will be able to be selected for entry in SMART eR depending upon the users account code permissions. When creating new Expenditure account codes that have an object value greater than 299, these account codes will be automatically checked as viewable on SMART eR.



The checkbox for a vendor can be set via AP>Vendor Setup>Vendor. If the 'Viewable on SMART eR' checkbox is checked, this vendor will be able to be selected for entry in SMART eR.



If you have any questions, contact your Regional Support Center for assistance.

Overbudget Approvals

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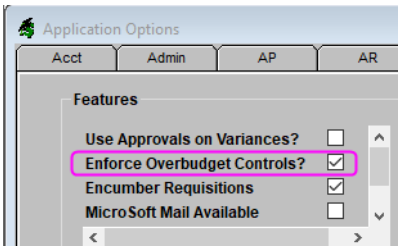
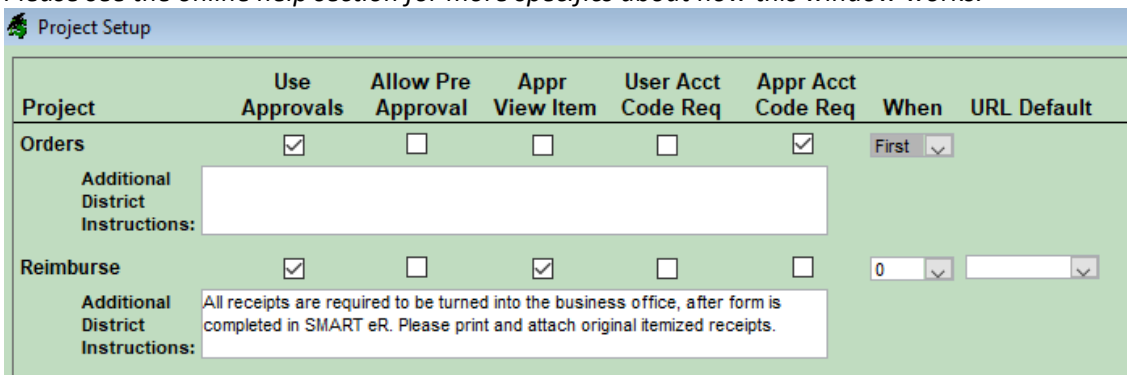
The Overbudget Controls functionality can be used with the Requisition Approvals as another layer of approval in the routing process. This is optional functionality that can be used. In addition to having Requisition Approvals checked in SMART Finance, the **Enforce Overbudget Controls** must also be checked to activate the overbudget approval process (SMART Finance>Administration>Application Setup>Application Options|PO tab). Contact your Regional Support Center for assistance.



Project Setup

This window is used to setup the Approval processes for SMART eR for each project. It will only need to be setup once before the project starts. The default rows are not allowed to be deleted and once a project is using approvals, cannot be shut off without help from the Region. The Reimbursement Approval functionality can be set via *SMART HR | Emp Mgmt | Permissions | Project Setup.*

Please see the online help section for more specifics about how this window works.



Online Shopping-Vendor Setup - Regions

In order to use the Online Shopping page in SMART eR, the vendor(s) have to be setup in the district database.

1. Access the *Region | All | SQL Maintenance* window in SMART. Select SMART eR and then the appropriate Prod_Punch_Out_Data script.

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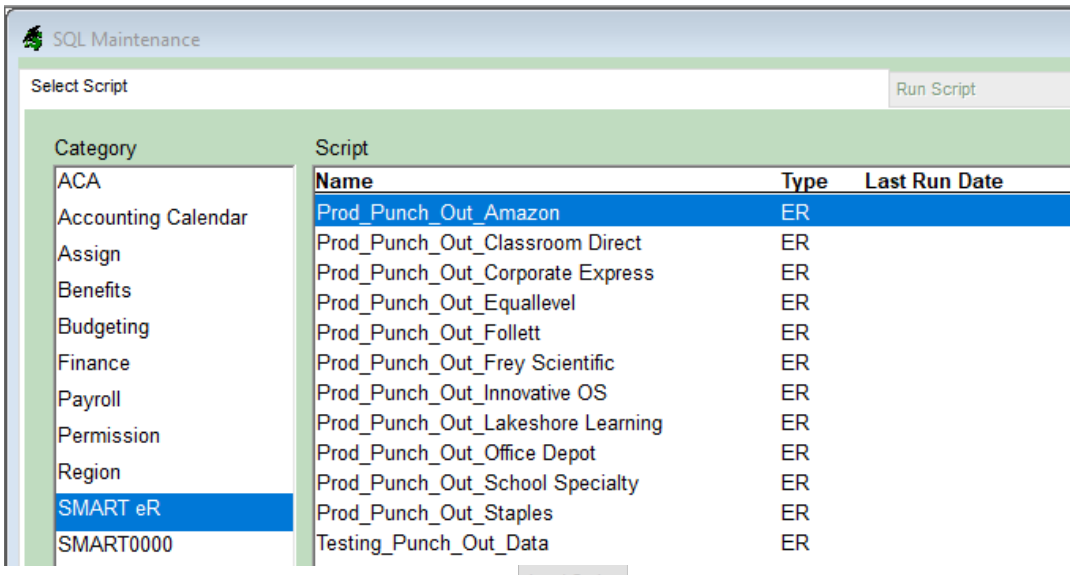
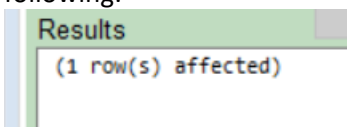


2. Click on Load Script button off to the right. Load Script
3. Change the 'ven_cd', 'ven_grp_cd', 'user_identity' and 'password' fields. Verify the values were entered correctly.

4. Click on the Run Script button to setup this vendor. Run Script
5. The script will run; and in the results box (below the SQL Script box) it will display the following:



6. Verify this vendor is setup in the Online Shopping page in SMARTeR. (Under My Requests)

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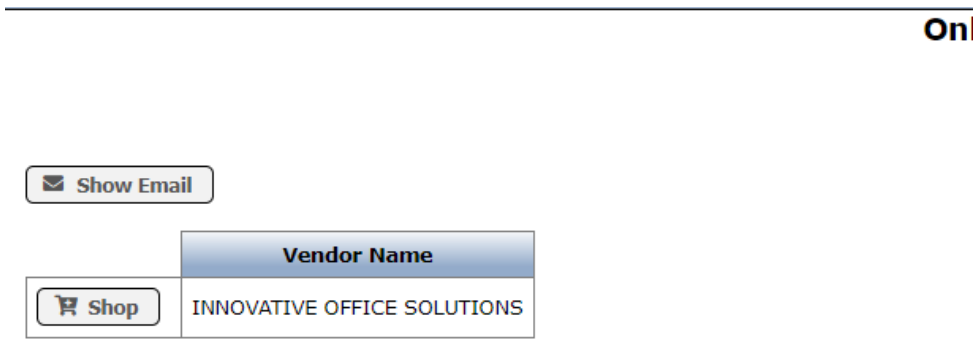


Ordering SMARTeR Employee Roles

By default, all users have rights to the Requisition Entry page on SMART eR. This default access does not give full rights to all fields within the Requisition 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).

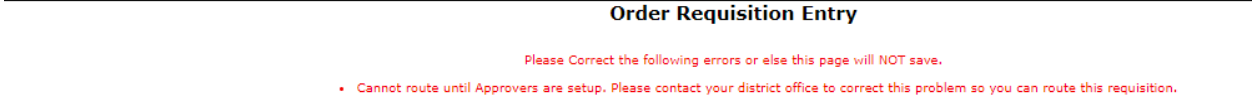
Setup of Permissions & Approvers

Depending on your districts ordering process, setup of permissions and approvers must be completed to utilize the approval process. To assist with setup, follow the guide, Ordering Setup Scenarios, to assist with setup. This document can be found within SMART under the Region\Doco\Regional Documentation\eR\Ordering\Ordering Setup Scenarios. If further information is needed regarding Employee Management (Permissions), reference the following document under within SMART under the Region\Doco\Regional Documentation\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



Solution: To correct this problem, doublecheck that approvers are built in the **Setup Permission**s or **Setup Approvers** window in SMART HR.

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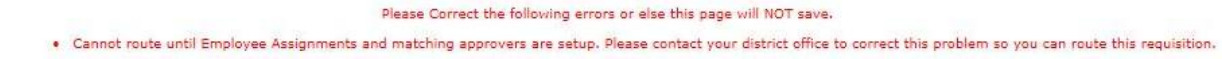
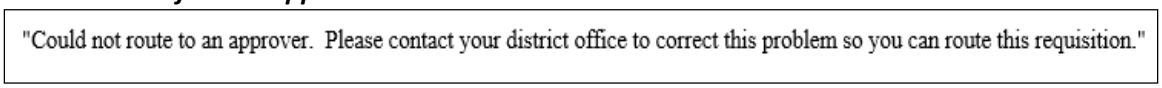
Issue: Employees not setup for assignments or hooked to their supervisor



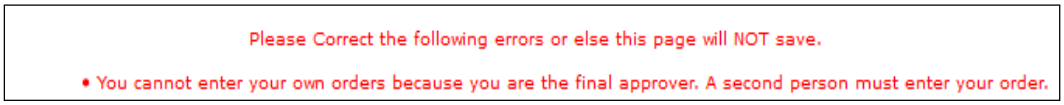
Solution: To correct this problem, doublecheck that an assignment row was setup and that they are setup in the **Employee Hierarchy** window in SMART HR.

Issue: Cannot find an Approver at all



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. This is usually set for the superintendent user.

Custom Workflow Notifications

If a person with HR|Payroll Permissions would like to get notifications to the Dashboard when reimbursements are approved, it can be setup in this window. The setting would need to be set to active. To get to this window, go to *Emp Mgmt|Permissions|Custom Workflow Notifications.* To set the people that should get the notification, go to *Emp Mgmt|Permissions|Setup Workflows*.

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 **My Requests**.
5. If you desire to order from a vendor's webstore, click on **Online Shopping** 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 'Order Requisition Entry' portion of this document.

Order Requisition Entry

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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 not routed status until the creator routes it for processing. If these fields are NOT filled in, it will change to a routed 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 status of not routed, routed, validated/approved 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 finishing with data *(Status = Routed).* This tab will provide access to create a new requisition, edit an existing requisition or change the status on the requisition. The system will cleanup any unfinished/unneeded entries as of the date the district chooses which is shown at the top.

Definitions of requisition status

- **Not Routed** - requisition has been entered by a user but it may not be finished for all required data.
- **Routed** - requisition has been entered by a user and sent to an approver. The requisition is not finished for all required data.
- **Validated** - requisition has been entered by a user and sent to an approver. The requisition has all the required data validated.
- **Approved** - requisition has been entered by a user and finished the approval process. All the required data has been validated and the requisition can be transferred to a purchase order.
- **Completed** - requisition has been entered by a user, finished the approval process and transferred to a purchase order record. In the approval process, it can also be a requisition that was denied. *In the non-approval process, a requisition can be set to a completed status by a user with higher security rights.*
- Status changes in a non-approval setup: Not Routed, Routed, Approved, Completed.
- Status changes in an approval setup: Not Routed, Routed, Validated, Approved, Completed.

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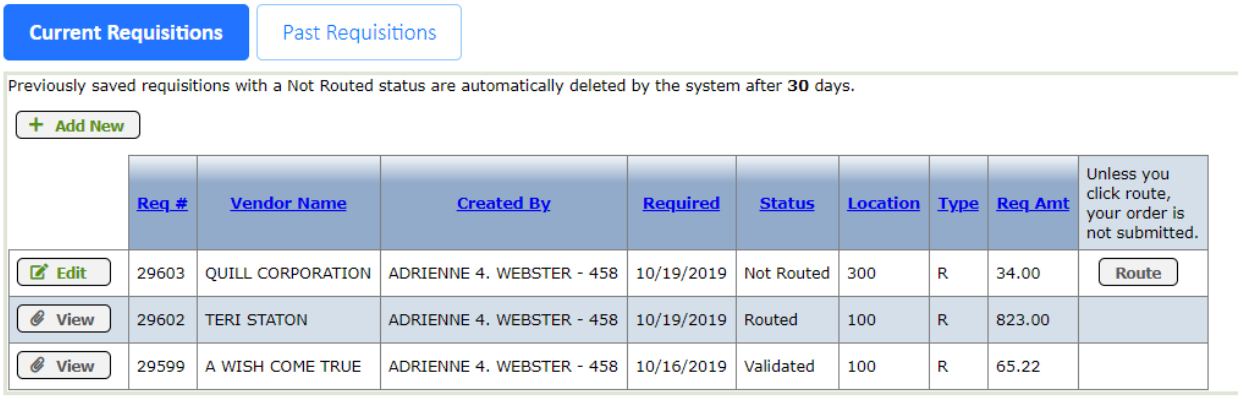
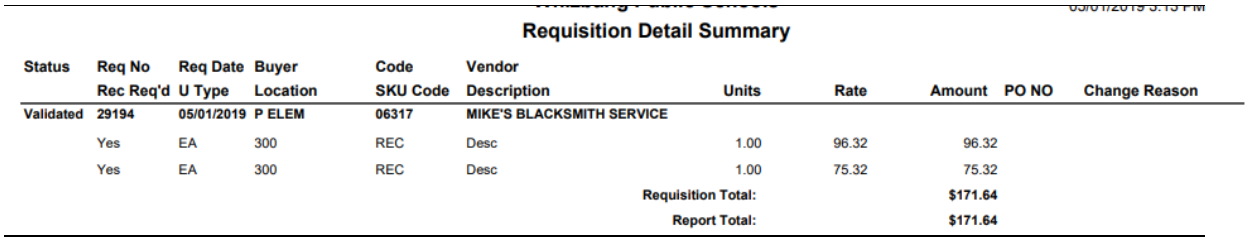


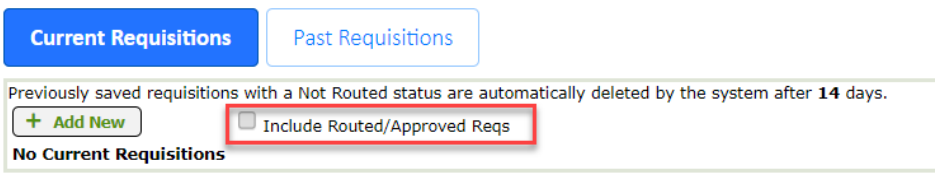
- **To Edit an existing requisition**: Click on the **Edit** button to edit an existing requisition. Information will follow on the data fields to be entered.
- **To change the Sort**: By default, both tabs will sort by Requisition Number. To change the sort temporarily, click on the blue underlined 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.



Requisition Detail Summary

Status	Req No / Rec Req'd	Req Date / U Type	Buyer / Location	Code / SKU Code	Vendor / Description	Units	Rate	Amount	PO NO	Change Reason
Validated	29194	05/01/2019	P ELEM	06317	MIKE'S BLACKSMITH SERVICE					
	Yes	EA	300	REC	Desc	1.00	96.32	96.32		
	Yes	EA	300	REC	Desc	1.00	75.32	75.32		
						Requisition Total:		$171.64		
						Report Total:		$171.64		

In the case where **approval is not set,** a user may notice the '**Include Routed/Approved Reqs'** option at the top of the list. If checked, this will display all Routed and Approved status requisitions. Based on security rights, this will allow the user to edit them prior to transferring them to a purchase order record in SMART Finance.



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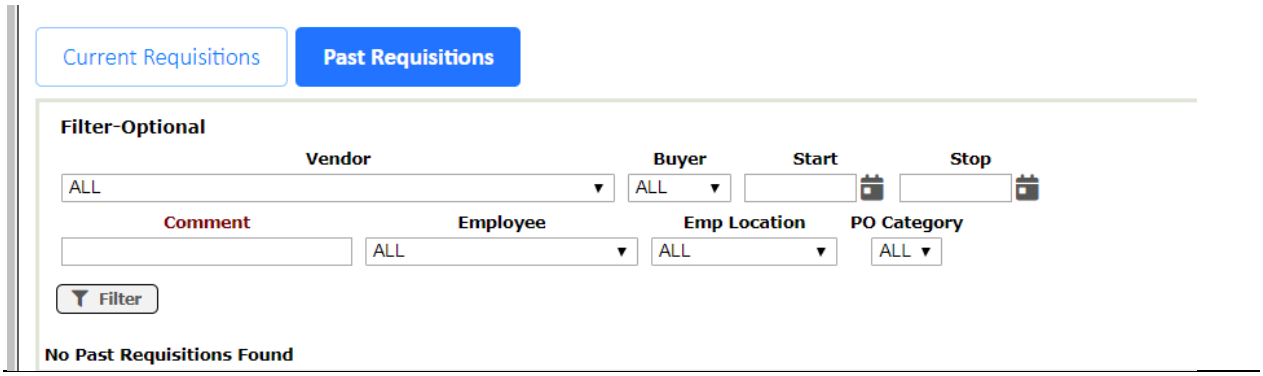
Past Requisitions Tab

If there are existing completed 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 completed status requisition.



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

To work with Past Requisitions

The help for this page changes often, so please see the online help for specifics on this window.

Ordering (with Online Vendors)

1. Click on Requests|**Online Shopping**.
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.)

	Vendor Name
Shop	AMAZON.COM
Shop	CLASSROOM DIRECT.COM
Shop	CORPORATE EXPRESS
Shop	EXPRESS
Shop	FREY SCIENTIFIC
Shop	INNOVATIVE OFFICE SOLUTIONS
Shop	LAKESHORE LEARNING MATERIALS
Shop	OFFICE DEPOT
Shop	SCHOOL SPECIALTY

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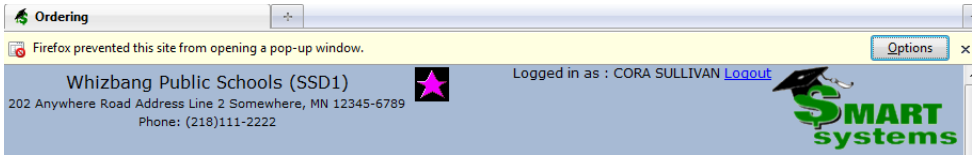
3. The new website will open in a new window or tab.

NOTE: *You may get a warning depending on your browser SMART 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. 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.**

a) If you are logged in, click **Checkout**.

b) 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)*.

The help for this page changes often, so please see the online help for specifics on this window.

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.

The help for this page changes often, so please see the online help for specifics on this window.

Routed Tab

This tab will display any in process (status = *routed or validated)* 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. Click on the column headings in blue to resort the list.

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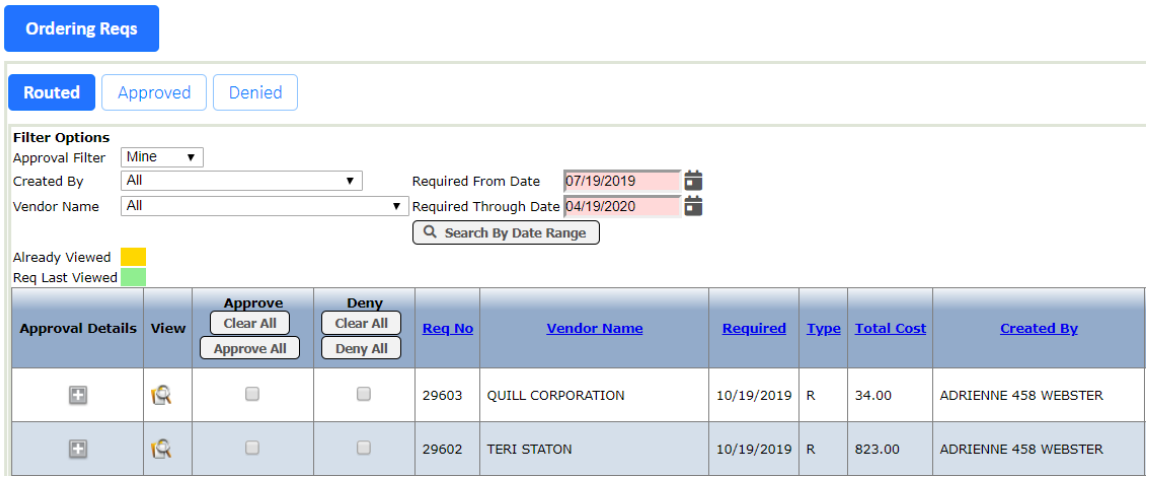
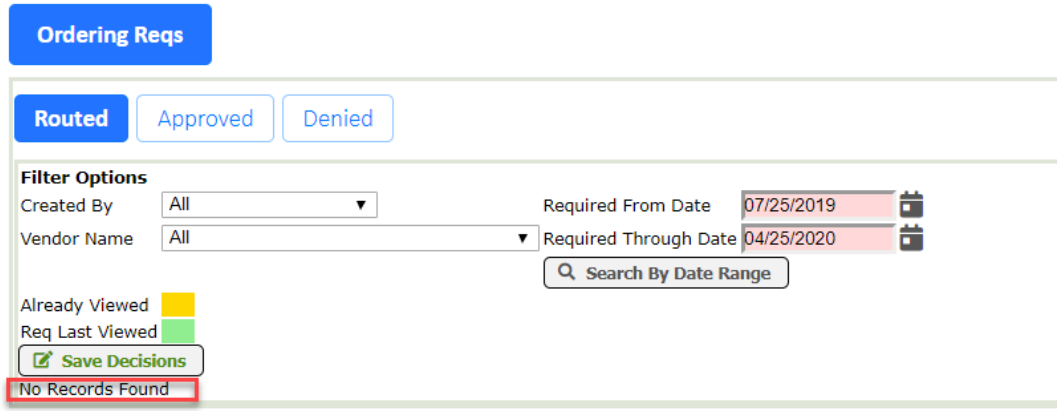


If there is data, it can be filtered down to search out a specific record. The top portion of the page has the options to filter the requisition records.

Approved/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".



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 .

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:

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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 approved status.

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

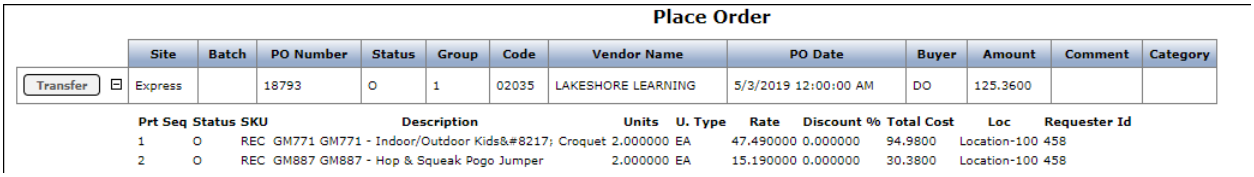
The help for this page changes often, so please see the online help for specifics on this window.

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.

The help for this page changes often, so please see the online help for specifics on this window.

1. Under **Responsibilities**, click on **Place Order**.
2. A list of Approved/Not In route/Unprinted Purchase Orders will appear.



Place Order

	Site	Batch	PO Number	Status	Group	Code	Vendor Name	PO Date	Buyer	Amount	Comment	Category
Transfer	Express		18793	O	1	02035	LAKESHORE LEARNING	5/3/2019 12:00:00 AM	DO	125.3600		

Prt Seq	Status	SKU	Description	Units	U. Type	Rate	Discount %	Total Cost	Loc	Requester Id
1	O	REC GM771	GM771 - Indoor/Outdoor Kids’ Croquet	2.000000	EA	47.490000	0.000000	94.9800	Location-100	458
2	O	REC GM887	GM887 - Hop & Squeak Pogo Jumper	2.000000	EA	15.190000	0.000000	30.3800	Location-100	458

***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.*

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.*

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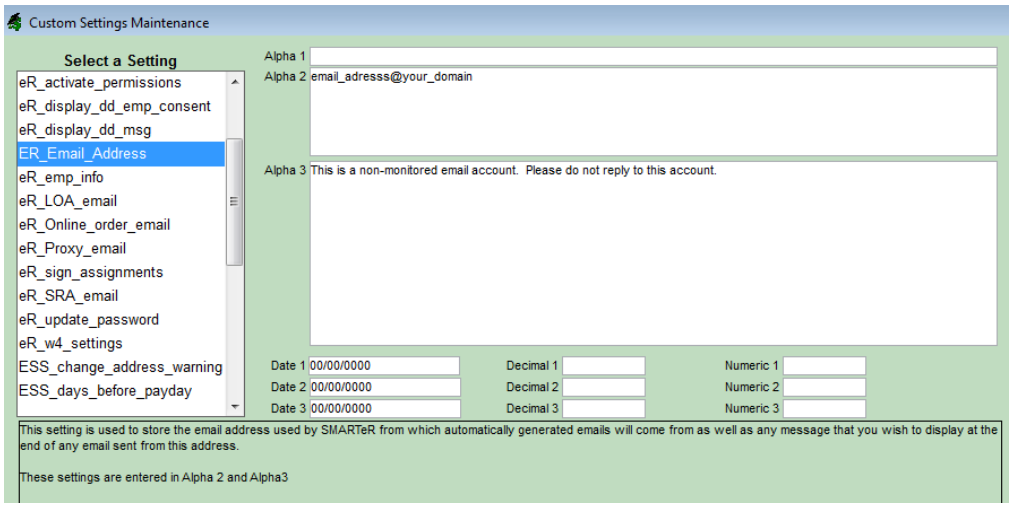

***Note**: Alpha 2 defaults in as: email_adresss@your_domain . You need to change this field to something that makes sense to the district; otherwise, it will cause the emails to get filtered out or put into a bulk/SPAM folder. There is a non-monitored email disclaimer that will get put on the bottom 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.

Please see the online help for specifics on this window works.

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).*

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- **Approval Audit-Ordering Reqs:** This report will list Req #, vendor name, type, total cost, created by, and comments and then display the specific routing information per each requisition.
- **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

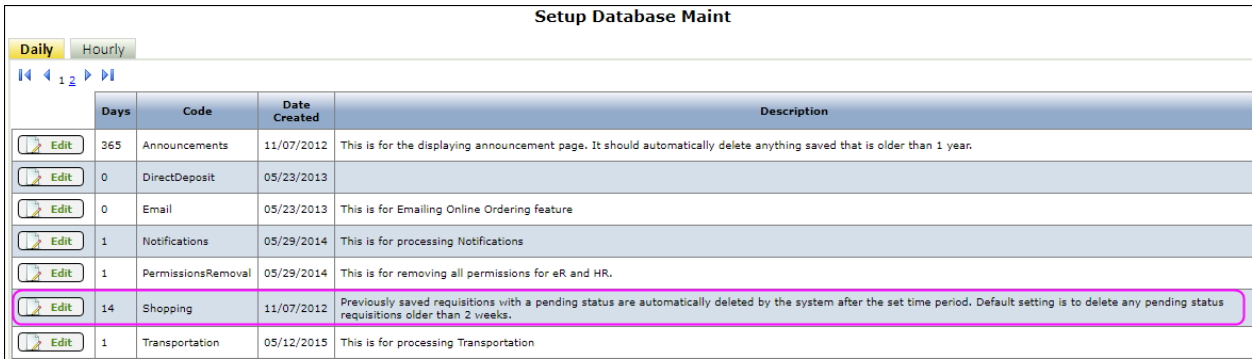
These settings are optional but may assist in the flow of data.

The help for the page changes often, so please see the online help for specifics on the window.

Setup Database Maintenance

This section covers the settings for the shopping database maintenance found under the Other>Setup Database Maint menu item (*a user would need the role = Setup to view this menu)*. This setting will remove any previously saved not routed 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 not routed status requisition older than the 14 days, 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)



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.

This is for notifications for SMART eR entirely, not just for the Ordering section.

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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.

Emp Notification Defaults (District Setting)

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).*

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).* 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.*

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