Administrator Training

Region V Computer Services

August 23, 2022

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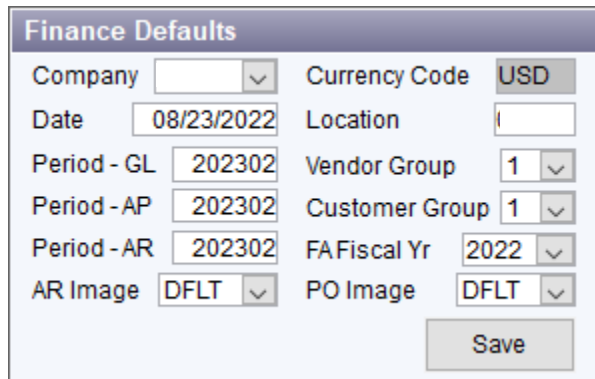
Session Defaults
Session Defaults is the first screen displayed when logging onto SMART Finance. This screen displays information about the date, location, accounting period, and vendor/customer group that will default onto all screens in SMART Finance.

The default accounting period matches the calendar date. For example, on August 23, 2022 the default accounting period is 202302.

The Period indicates which period to encumber against. Therefore, it is essential to change the Date and Period(s) as needed.

For example, the default is the current date and period of August, but you may be doing June work and want to encumber against June. With this example, it would be appropriate to change the date to June and the periods to 202212. Once you tab off of the date, the periods will automatically change.

Finance Defaults

Company		Currency Code	USD
Date	08/23/2022	Location	
Period - GL	202302	Vendor Group	1
Period - AP	202302	Customer Group	1
Period - AR	202302	FA Fiscal Yr	2022
AR Image	DFLT	PO Image	DFLT
			Save

SMART Finance allows you to change periods at any time while you are working in a module.

To change periods:
1. Click on the Quick Access Toolbar → Dashboard.

Dashboard

Calculator

Magnifier
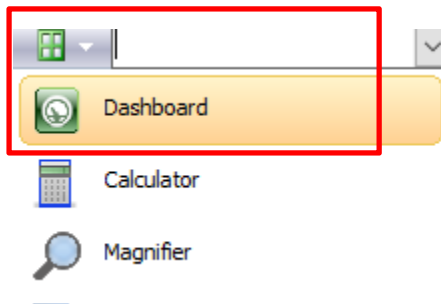
2. The Dashboard will appear allowing you access to the Session Defaults.
3. Edit the date field as needed and the Period fields will automatically change to correspond to the date.
4. Edit the Location field, if needed: select a default location for Requisitions/Purchase Orders.
5. Click Save.

Accounting Calendar – FY23

The accounting calendar below identifies what period to use for the time frame for FY23. Periods 01-12 represent the months of July – June. For period 13, these should be the journal entries made for the audit. For period 14, this is only used for the closing entry done at year end to zero out the revenue and expenditure totals and move them to the related balance sheet codes.

Period	Start Date	End Date	Fiscal Year
202301	7/1/2022	7/31/2022	FY23 – July
202302	8/1/2022	8/31/2022	FY23 – August
202303	9/1/2022	9/30/2022	FY23 – September
202304	10/1/2022	10/31/2022	FY23 – October
202305	11/1/2022	11/30/2022	FY23 – November
202306	12/1/2022	12/31/2022	FY23 – December
202307	1/1/2023	1/31/2023	FY23 – January
202308	2/1/2023	2/28/2023	FY23 – February
202309	3/1/2023	3/31/2023	FY23 – March
202310	4/1/2023	4/30/2023	FY23 – April
202311	5/1/2023	5/31/2023	FY23 – May
202312	6/1/2023	6/30/2023	FY23 – June
202313	6/30/2023	6/30/2023	FY23 – 13th Month
202314	6/30/2023	6/30/2023	FY23 – 14th Month

Favorites

Within SMART Systems, you can create a favorites list of commonly used reports, summary screens or entry screens.

- When you locate a menu item that you frequent. Right Click on the menu item and select Add to My Favorites
- To remove a menu item you no longer wish to have in your favorites open the My Favorites menu and Right Click on the menu item and select Remove from My Favorites
- To group your favorites into sub menus, open up your My favorites menu and Right Click. Select Add new Group. Click on the menu item and drag it into the folder you created.

- To Open the My Favorites menu click on the Quick Access Toolbar

Routing and Electronic Approval Capabilities

Within SMART Finance, certain transactions can be electronically routed for approval. Therefore, manual signatures are not needed. Also, documents don't have to be transferred between offices or buildings. The routing feature identifies who the transaction was routed to, the action taken (approve/reject), date, and time. The routing feature may be used for:

- Purchase Orders
- Journal Entries
- Vendors
- Customers
- Vouchers

To electronically approve or reject a transaction follow these steps:
1. Click on the Quick Access Toolbar → In Tray.
2. Select a routing request.
3. Click the View Item button to view the transaction.
4. Select the radial button to either Accept or Reject the transaction.
5. Click on Send.
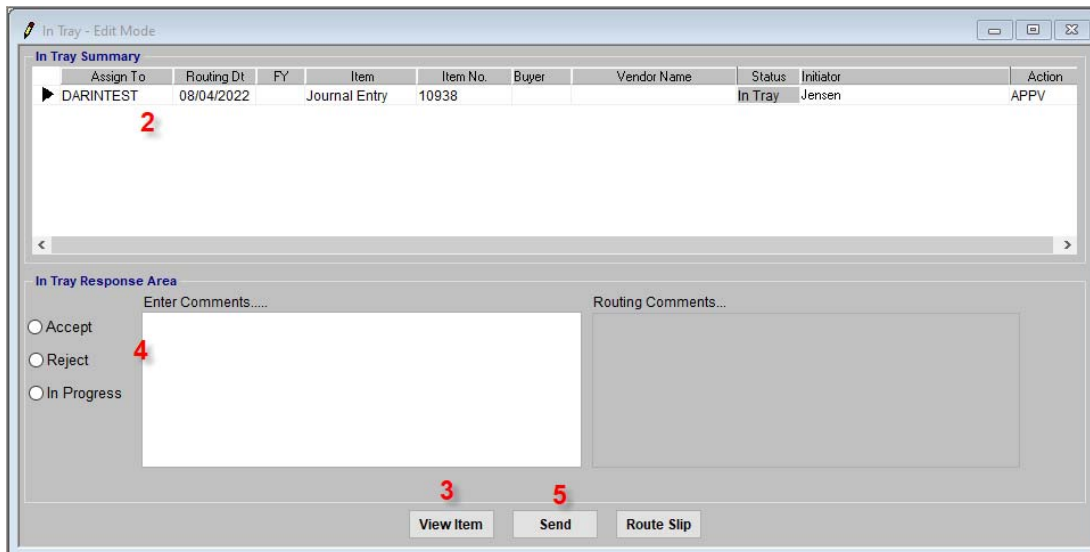
Each request must be completed individually.

Note: The View Item button can be set so the individual must view the transaction prior to accepting or rejecting it. The default does not force the transaction to be viewed.

Data Analysis

Listed below are the areas where most administrative personnel will be able to locate information useful to them. Items discussed are just a few suggestions that may assist in analyzing district data.

Query & Find

In most entry and summary screens, if you are in the Query Mode, you can find information from the various fields. For example, if you want to look at all the open purchase orders for period 202301 for your buyer code, you can query the period field, status field, and buyer code field on the Purchase Order Detail Summary screen.

1. Open the window that is the most suitable for your search.
2. If you are not in the Query Mode (see top of window), click on the Query button.
3. Enter the information you are looking for in the appropriate field(s). (The above example: Period = 202301, Status = Open, Buyer = Buyer Code.)
4. Click on Find.
5. If you do not receive the desired result, simply click on the Query button again to input different criteria.

Note: For example, if you do not know the exact name of a vendor, you may use the "like %" statement. The percent sign (%) encompasses all possibilities. Ex. The query "like %American%" would result in a find of all vendors with the name "American" in it.

Listed below are other query functions.

% Wildcard	This function includes everything.
Like e.g.: like cat% in the description.	Displays all first words starting with cat. The like function can only be used with alphanumeric fields.
= Equal to	This function includes any values equal to the search criteria. e.g.: =1000.
> Greater than	This function includes any item in the search criteria greater than the stated values. e.g.: >6/30/2022.
< Less than	This function includes any item in the search criteria less than the stated values. e.g.: <7/1/2022.
<> Not equal to	This function includes all items in the search criteria other than the stated value. e.g.: <>100. This includes all amounts above or below 100.
> = Greater than or Equal to	This function includes all items greater than or equal to the stated search criteria. e.g.: >=07/01/2022 would include all transactions created on or after July 1, 2022.
< = Less than or Equal to	This function includes all items less than or equal to the stated search criteria. e.g.: <=06/30/2022 would include all transactions created on or before June 30, 2022.

Searches can be limited farther by using a combination of columns to query data. If you are interested in retrieving only open purchase orders, choose Open in the field or column of Status along with the date query of >=07/01/22. Click Find. This will retrieve all open purchase orders dated July 1, 2022 or later.

The Summary screen will show vendor and date information, for example. The Detail Summary screen will list the detail lines of the transaction. This screen is very helpful to look up detailed information. Both screens can also give you the totals of transactions entered. See below for additional information about the Summary and Detail Summary screens.

Summary Screens

Summary screens are an excellent way to quickly look up information on transactions. The screens are used as view only. Editing of data is not allowed. Detail for the data viewed on this screen is easily attainable by double-clicking on the line of interest or highlighting the line and then clicking the Detail button. Depending on the level of security a user has, editing may be done on the detail screen.

Summary screens are available within the following areas:
- Journal Entries
- Invoices
- Receipts
- Vouchers
- Payments
- Requisitions
- Purchase Orders

Each area allows queries on various items, depending on the area selected.

Detail Summary Screens

The Detail Summary screen will list the detail lines of the transaction. This screen is very helpful to look up detailed information. It will list information such as the description of what has been ordered, the unit price, the account code used, the vendor, the period the transaction was done along with a journal entry code, if applicable, as well as many more items of interest.

Detail Summary screens are available within the following areas:
- Invoices
- Receipts
- Vouchers
- Payments
- Requisitions
- Purchase Orders

Please keep in mind that on the Detail Summary screen, you are able to search by the account code, journal entry code, or description of the transaction.

Account Analysis
Account Analysis is used to display account balances and has drill down capability to investigate supporting detail records.
1. Finance → General Ledger → Account Analysis.

2. Enter the Start Period and End Period desired.
3. The fields Include Budget, Budget Code, and Include Encumbrances will automatically be flagged. The Budget Code defaults from the Fiscal Year Maintenance screen based on the Start Period entered.
4. Select options desired. **NOTE:** You will only be able to choose Inc Encumbrance or Inc Unposted. Use the horizontal scroll bar to move the lower half of your screen to the right, if needed.
5. Enter an account code or range of accounts you wish to display and click Find. (For example, entering 300 in the Org field will display all accounts with Org 300. Entering 4% in the O/S field will display all Object or Source codes in the 400 series.) Clicking Find without selecting specific accounts will display all accounts.
   > *Warning: Depending upon your district size, clicking FIND without a limiter will take longer for the search to complete.*
6. Click on any segment of the account you wish to investigate and click the Detail button at the bottom to see the posted activity of the account code.
   a. To see the journal entry that originated a specific dollar amount, click on that dollar amount and click the General Ledger button.
   b. If you wish to view a voucher that affected this account, the Source column will contain an AP.
   c. Click on the amount you want to investigate.
   d. Click on Subsidiary Ledger.
   e. Click on the voucher number you wish to display and click the Detail button.
7. Click the Encumbrance button to investigate the purchase orders/vouchers/journal entries/requisitions that are creating the encumbrance.
   a. Click on the respective tab to view the encumbrance.
   b. Click the Detail button on that screen to get to the transaction.
8. Click on the PAA Report button to be taken to the Posted Activity Audit Report for the highlighted account code.
9. You may print the Account Analysis window if you would like a hard copy. To do this click on Actions → Print. You may want to resize or hide columns in order for the columns to fit the width of a page.
10. Close all windows when done.

Note: UFARS Account Analysis works the same way, except it shows both the UFARS and district account code.

Reports

Listed below are processes within the reports area and reports that might be helpful in looking up and analyzing district data. Reports identified below are some of the most common reports used by districts.
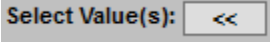
Using the Report Retrieval Window

The Report Retrieval allows the user to quickly key parameter values to retrieve specific information for a report.
1. Finance → Custom Reports (or the module of choice) → Reports and then select the report you want to run.
2. The Report window will be displayed.

3. Tab or arrow up/down on the parameters to go from one value to the next. If no values are entered in a field, the report will run wide open. As you enter in values, the report will filter down the results accordingly.
4. Click on a Retrieval Argument Value field to receive values on the right side of the screen.
   Double click on the Select Value(s) or use the Select Value arrows **Select Value(s): <<** to transfer into the retrieval box.
   a. You can select multiple values by holding down the *Ctrl* key and then click the arrow button.
   b. You can also select a block of values by holding down the *Shift* key and then click the arrow button.
5. Some reports offer a dropdown box of functions of operation to retrieve specific information. These operators can help filter a report for a specific group of data.
6. To include particular information use the = or Like operators.
7. To exclude particular information use the Not Like or not = operators.
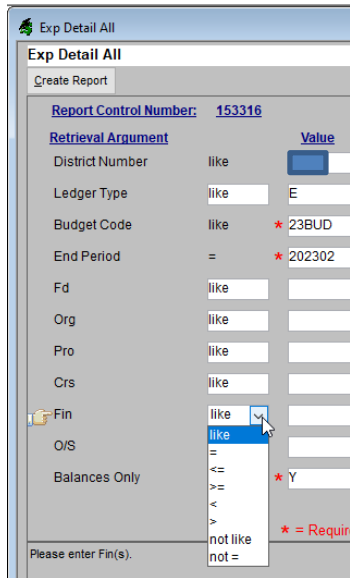
8. Click on Create Report to run the report.
9. Review the results on the window.
10. If the report is not what you wanted, click the Redo icon. ![Redo] The first time this icon is clicked, the report values will be set back to what was just run for the report. The second time the Redo icon is clicked the report values will be reset back to their default values.

Using Report Defaults

The Report Defaults allow the user to save multiple sets of retrieval arguments for a particular report. When the report is run, these same defaults can be referenced thus avoiding entering the report values again. The controls for the Report Default setup are at the bottom-right corner of the window.

1. Open the Report window and enter the desired parameter values.
2. Place your cursor in the box to the right of the ![Save As:] button.
3. Enter up to a 20 character title in the area.
4. Click the ![Save As:] button.
5. The Report Default name moves up into the Report Defaults box and can be selected when running the report in the future.

Note: Report titles may be changed to meet specific needs.
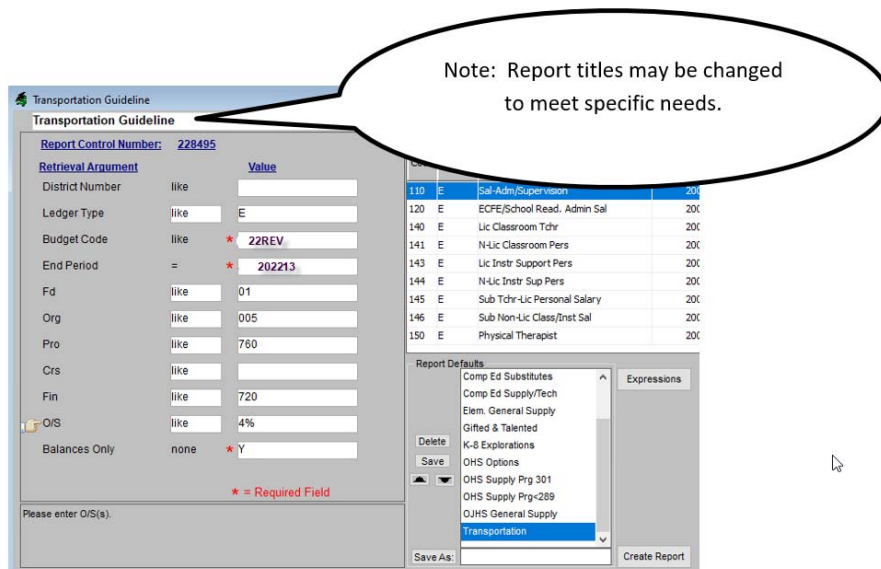
6. Multiple defaults can be set for the same report. If more than ten defaults are saved, a scroll bar will appear to scroll up or down the alphabetized list of Report Defaults.
7. If the Report Default is no longer needed, the Delete [Delete] button will remove the default from the list.

Expenditure/Revenue Guideline Report

Many reports are available in SMART Finance to allow the user to view budget information quickly and efficiently. Each district can have their own unique budget reports created to suit their specific needs. Please contact sfsupport@regionv.k12.mn.us if you would like a customized report created.

1. To run guideline reports go to Finance → Custom Reports → Custom Ledger Reports.
2. Choose the report or folder desired.
3. Enter in the parameter files of choice (examples below).
   a. Ledger Type (E or R or E,R)
   b. Budget Code, if different from default.
   c. Fd (01 or 01, 02, 04 or 0%)
   d. Fin (4% or 302)
   e. O/S (3%, 4%, 5%, 7%, 8%)
4. Click Create Report.
5. The report can now be viewed, printed, or saved as a file.
6. Once the report appears on screen, it can be exported to Excel or another report of choice by going to File → Save To File. Also, it can be extracted to Excel.

Below is what the report will look like.

Elem Expenditure Guideline
Period Ending June 30, 2022

r_gl_exprevgd

Sequence: Fd, Org, Pro, Crs, Fin, O/S

L	Fd	Org	Pro	Crs	Fin	O/S	Class	Sub	Description	22REV Annual Budget	Period 202213	Year To Date	% YTD	Encumbrances	% YTD + Enc	Remaining Balance
01									General							
	839								Elementary School							
		050							Administration							
E	01	839	050	000	000	401	422	000	ES Office-General Supplies	700.00	0.00	458.26	65%	9.98	67%	231.76
E	01	839	050	000	000	820	422	000	ES Office-Dues/Membership	934.00	0.00	934.00	100%	0.00	100%	0.00
E	01	839	050	000	000	891	422	000	TRA/PERA Spec Funding	1,400.00	0.00	0.00	0%	0.00	0%	1,400.00
		050							Administration	3,034.00	0.00	1,392.26	46%	9.98	46%	1,631.76
	839								Elementary School	3,034.00	0.00	1,392.26	46%	9.98	46%	1,631.76
01									General	3,034.00	0.00	1,392.26	46%	9.98	46%	1,631.76
									Report Totals:	3,034.00	0.00	1,392.26	46%	9.98	46%	1,631.76

Posted Activity Audit Report

The Posted Activity Audit Report will list each account code and the detailed information below it. It can be run for a specific period and includes posted activity only. An encumbrance total will be listed, but detail of those encumbrances will not appear. Be sure to limit the search of this report by selecting specific criteria needed.

1. Finance → Custom Reports → Custom Ledger Reports → Posted Activity Audit Report.
2. Enter in the parameter fields of choice.
3. Click Create Report.
4. The report can be exported or printed as desired.

Below is what the report will look like.

r_gl_post_actaudit

Posted Activity Audit Report
202201 through 202212

Sequence: Comp, L, Fd, Org, Pro, Crs, Fin, O/S

01neral

0111	E	01	005	110	000	000	366	Busn Office-Travel/Conventions	St Bal:	$0.00	Activity:	$680.00	Enc:	$0.00	End Bal:	$680.00

Type	Code	Period	Date	St	Vendor / Cust / Desc	Detail Description	PO#	Inv Ref	PmtDt/DepCtl	Pmt Tp	Check#	Amount
JE	10887	202211	05/26/22		9 TRANSFERS	WROKING LUCHES INTERVIEWS						285.00
									Total JE Activity:			$285.00
VOU	72891	202203	08/20/21	1	8667 CHASE - VISA	MASBO-TAX WORKSHOP		RAITER, L	09/15/21	WX	0	25.00
VOU	73831	202206	11/20/21	1	8667 CHASE - VISA	MASBO-FALL CONF		RAITER, L	12/15/21	WX	0	80.00
VOU	75529	202211	04/20/22	1	8667 CHASE - VISA	MASBO-ANNUAL CONF		RAITER, L	05/10/22	WX	0	290.00
									Total Voucher Activity:			$395.00

	01neral	$0.00	$680.00	$0.00	$680.00
	Report Total Balance:	$0.00	$680.00	$0.00	$680.00

Budget Activity Report

The Budget Activity Report is similar to the Posted Activity Audit Report. However, it also shows the budget information along with encumbrance detail. It is an excellent report to see many different bits of detail. Be sure to limit the search of this report by selecting specific criteria needed.

1. Finance → Custom Reports → Custom Ledger Reports → Budget Activity Report.
2. Enter in the parameter fields of choice.
3. Click Create Report.
4. The report can be exported or printed as desired.

Below is what the report will look like.

r_gl_post_actbudget

Budget Activity Report
Period Ending 202108
Budget Code: 21REV

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8/10/2021
15:44:27

Sequence: Comp, L, Fd, Org, Pro, Crs, Fin, O/S

01

0111 E 01 005 108 000 000 401   Dist Tech-General Supplies   Budget $1,000.00   Activity: $724.16 Enc: $596.40 End Budget   ($320.56)

Type	Code	Period	Date		Vendor / Cust / Desc	Detail Description	PO#	Inv Ref	PmtDt/DepCtl	Pmt Tp	Check#	Amount
PO	11264	202108	02/19/21	1	4181 TIERNEY BROTHERS, INC.	GROMMET PLATES						596.40
										Total PO Activity:		**$596.40**

Posted Activity

Type	Code	Period	Date		Vendor / Cust / Desc	Detail Description	PO#	Inv Ref	PmtDt/DepCtl	Pmt Tp	Check#	Amount
VOU	69409	202104	08/20/20	1	8667 CHASE - VISA	CALENDLY			STUTSMAN, D 10/01/20	WX	0	10.00
VOU	69409	202105	08/20/20	1	8667 CHASE - VISA	CALENDLY			STUTSMAN, D 10/01/20	WX	0	(10.00)
VOU	69507	202105	09/20/20	1	4921 Amazon Credit PLAN	B082T62B8S AmazonBasics Light	10788	1336-DGP4-NI	11/12/20	CH	58016	209.94
VOU	69507	202105	09/20/20	1	4921 Amazon Credit PLAN	Amazon Shipping Charge	10788	1336-DGP4-NI	11/12/20	CH	58016	0.00
VOU	69510	202105	11/03/20	1	4921 Amazon Credit PLAN	B002M1HKLC DYMO Industrial Lal	10957	1Y19-Y4XK-G	11/12/20	CH	58016	160.32
VOU	69510	202105	11/03/20	1	4921 Amazon Credit PLAN	Amazon Shipping Charge	10957	1Y19-Y4XK-G	11/12/20	CH	58016	0.00
VOU	69805	202106	12/04/20	1	2835 MAYER LUMBER CO.	SUPPLY PANEL PORJECT		194632	12/10/20	CH	58107	40.57
VOU	70021	202106	11/20/20	1	8667 CHASE - VISA	DEMCO-ASSET LABLE PROTECT(			STUTSMAN, D 12/15/20	WX	0	68.90
VOU	70135	202107	12/31/20	1	4921 Amazon Credit PLAN	B07FMCHQ8W TOGGLER SNAPT(	11115	1MMT-WRWK-	01/19/21	CH	58252	113.94
VOU	70135	202107	12/31/20	1	4921 Amazon Credit PLAN	Amazon Shipping Charge	11115	1MMT-WRWK-	01/19/21	CH	58252	0.00
VOU	70384	202108	01/10/21	1	4921 Amazon Credit PLAN	B000BPELMW Interstate Batteries	11123	11N1-7RXJ-FL	02/18/21	CH	58340	80.73
VOU	70384	202108	01/10/21	1	4921 Amazon Credit PLAN	Amazon Shipping Charge	11123	11N1-7RXJ-FL	02/18/21	CH	58340	0.00
VOU	70431	202108	02/04/21	1	8676 DELANO TRUE VALUE	PANEL PROJECT		117983	03/23/21	CH	58596	49.76
										Total Voucher Activity:		**$724.16**

Multi Year Guideline Report

The Multi Year Guideline Report will allow the user to compare three different years of budgets and year-to-date activity amounts. This is an excellent report to compare what has occurred over a period of time in a summary format.

1. Finance → Custom Reports → Custom Ledger Reports → Multi Year Guideline.
2. It must be run from earliest to most recent for the budget codes and periods to see all account codes correctly. The budget codes and ending periods will automatically default in based on the session default's screen.
3. Input the appropriate ledger, fund, and other segment information as needed.

Below is what the Multi Year Guideline Report looks like.

								202113			202213			202302		
								Budget	Year to Date	%	Budget	Year to Date	%	Budget	Year to Date	%
L	Fd	Org	Pro	Crs	Fin	O/S	Description	21REV			22REV			23BUD		
01	General															
E	01	005	110	000	000	305		60,636.00	58,352.50	96%	85,000.00	77,707.90	91%	85,000.00	78,296.57	92%
							Busn Office-Fees for Services									
E	01	005	110	000	000	315		17,990.00	16,858.80	94%	17,990.00	17,970.00	100%	17,990.00	17,970.00	100%
							Rprs&Maint for Comp&Tech									
E	01	005	110	000	000	316		23,548.00	24,694.00	105%	23,548.00	20,347.60	86%	23,548.00	20,347.60	86%
							Data Processing Svcs									
E	01	005	110	000	000	329		15,159.00	9,585.96	63%	12,000.00	9,077.05	76%	12,000.00	9,077.05	76%
							Busn Office-Postage									
E	01	005	110	000	000	366		2,000.00	1,050.00	53%	2,000.00	680.00	34%	2,000.00	680.00	34%
							Busn Office-Travel/Conventions									
E	01	005	110	000	000	370		1,460.00	19,325.40	1324%	0.00	260.10	0%	0.00	260.10	0%
							Busn Office-Leases/Rentals									
E	01	005	110	000	302	316		4,066.00	0.00	0%	4,820.00	4,579.40	95%	4,592.00	4,579.40	100%
							Data Processing Svcs									
E	01	005	110	000	302	370		20,074.00	0.00	0%	0.00	20,587.32	0%	19,003.00	20,587.32	108%
							Busn Office-Copier Lease									
01	General							144,933.00	129,866.66	90%	145,358.00	151,209.37	104%	164,133.00	151,798.04	92%
							Report Totals:	144,933.00	129,866.66	90%	145,358.00	151,209.37	104%	164,133.00	151,798.04	92%

Over Budget Guideline Report

The Over Budget Guideline report will identify those account codes that are over budget. Be careful when reviewing these reports because some account codes would show they are over budget when maybe an audit entry or reclassification entry has not been completed based on the time of year.

1. Finance → Custom Reports → Custom Ledger Reports → Over Budget Guideline.
2. Enter in the parameter fields of choice.
3. Click Create Report.
4. The report can be exported or printed as desired.

Below is what the Over Budget Guideline Report looks like.

r_gl_exprevgd										Page 1 of 1 8/4/2022 08:35:49

Over Budget Guideline
Period Ending June 30, 2022

Sequence: L, Fd, Org, Pro, Crs, Fin, O/S

| L Fd Org Pro Crs Fin O/S	Class Sub	Description	22REV Annual Budget	Period 202213	Year To Date	% YTD	Encumbrances	% YTD + Enc	Remaining Balance
02 Food Service									
E 02 005 770 000 709 401	464 000	Sup/Mat Non-Instr.	0.00	0.00	13,526.79	0%	0.00	0%	(13,526.79)
E 02 005 770 000 709 490	464 000	Food	0.00	0.00	88,025.80	0%	0.00	0%	(88,025.80)
E 02 005 770 000 709 495	464 000	Milk	0.00	0.00	14,255.63	0%	0.00	0%	(14,255.63)
02 Food Service			0.00	0.00	115,808.22	0%	0.00	0%	(115,808.22)
		Report Totals:	0.00	0.00	115,808.22	0%	0.00	0%	(115,808.22)

Saving a File in PDF Format (To Email or Save)

Region V districts using RDS have the ability to save reports from SMART Finance and SMART HR as PDF files. The advantage of this feature is the ability to electronically transfer (email) reports that are identical to reports printed from the SMART applications. Examples include: emailing reports to teachers, emailing reports to board members, emailing reports to administrators, etc. The person(s) receiving the report can view or print the reports without the SMART applications loaded on their computers. Another use of PDF files is to electronically store/archive reports instead of printing a hard copy.
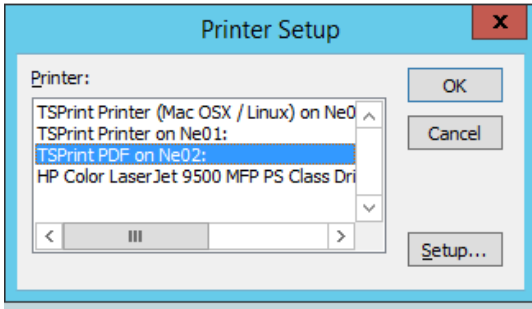
Note:
- We do not recommend emailing reports with social security or federal tax id numbers.

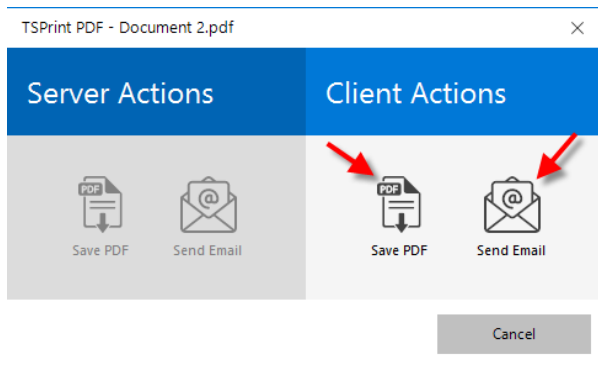To save a report as a PDF file, follow these steps:
1. Run a report in SMART Finance or SMART HR.
2. When the report is displayed on your screen, click Print.
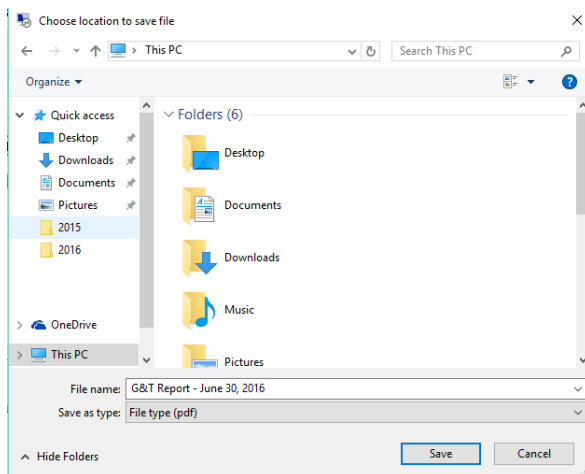3. Click on the Printer Setup button.
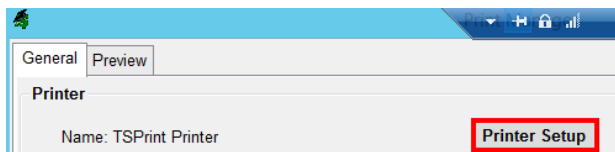
4. Select TSPrint PDF.

5. Click OK.
6. Click Print.
7. Select Save PDF or Send E-mail button depending if you want to save the PDF or email it immediately.

8. If you click on Save PDF, the "Choose location to save file" screen will appear.

   a. Select the location to where you would like to save the report.
   b. Enter the File name you want to save this report as then click Save. The report will be saved to the location identified above.
9. If you click on Send E-mail, it will attach the PDF file to an email that can be sent.

The PDF setting will default to all reports in SMART Finance and SMART HR until you log off. If you want to send reports to a printer, you will need to go to step 4 and select TSPrint Printer.

Excel Extract Option

This process allows a screen or report be extracted to Excel. It will extract what appears. This option is not available in all areas within SMART. We recommend this process be used with summary screens or budget workpapers for the best result. If this option is available, you'll see the following buttons activated on the toolbar at the top of the screen.
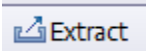
When the extract button is selected, a screen appears as shown below. True means yes. False means no.
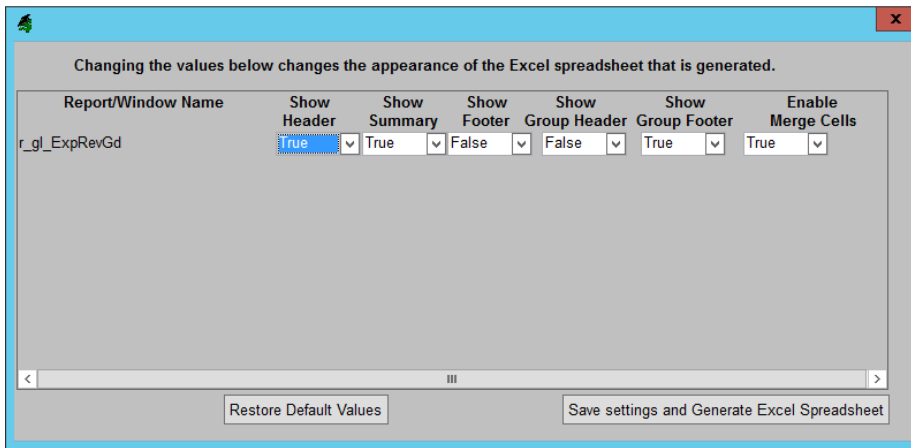
<u>Save settings and Generate Excel Spreadsheet</u> – When this button is selected, the above items will save and the Excel spreadsheet will be created. The next time the report or window is extracted to Excel these settings will appear, unless the "Restore Default Values" button is selected. Also, if more than one user uses this report, the last save by anyone will create the settings.

Once the "Save settings and Generate Excel Spreadsheet" is selected, you will receive a message that the file has been created. It will identify the location of the file. If it says the file can't be created because of the location, you will most likely need to install or update the Smart Client Folder or SMART HR folder. These folders are the same. The instructions can be located on our website under Support → Technical → Downloads → SMART Client Folders. Save the "smarthr" folder to your C: drive or other related drive depending on the district.

Note: After a file has been created, we strongly encourage you to rename or move the file. If the extract occurs again and the file name has not been changed or the file remains in the location, it will be overwritten when a new file is created.

Logging Off SMART

First, make sure all screens are closed. Then, you can either click on the Quick Access Toolbar → Exit or click on the "X" in the upper right-hand part of the screen, which will close SMART. See the screen shot below.
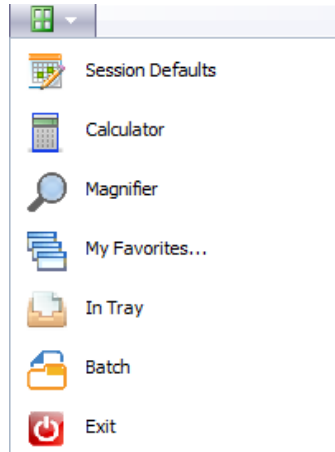
Logging Off RDS

First, make sure you have already logged off of SMART. Once that has been done, you should see the start up screen as received when you first entered RDS. Complete the following steps to log off correctly.

1. Click on Start at the bottom of the screen.

2. Click on your name in the upper right corner of the screen.
3. Click on Sign out.