

Mini Session – General SMART Operations



**Region V Spring Conference
April 4, 2024**

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Log into RDS and SMART



1. Log into RDS.

Windows Security

Enter your credentials

These credentials will be used to connect to the following computers:

- 1. rd.regionv.k12.mn.us (RD Gateway server)
- 2. rd.regionv.k12.mn.us (remote computer)

User name

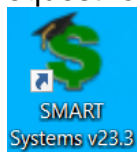
Password

Domain: regionv

Remember me

OK Cancel

2. Approve the Duo request for Multi-Factor Authentication (MFA) purposes.



3. Log into SMART.

4. Enter Employee ID and Password for SMART.

Version 23.3.0.07 02/06/2024
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SMART systems

OK
Cancel
Forgot Password
Help

Database: SMART0761

Emp ID:

Password:

5. Click OK.

Locked Out of SMART or Forgot Password

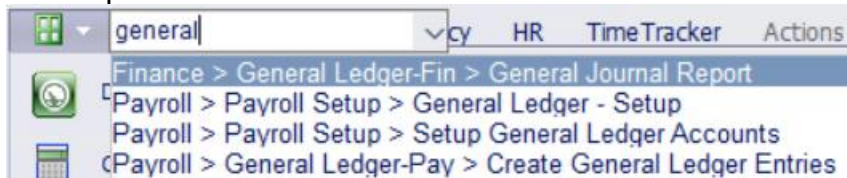
This process will help you get unlocked from SMART and/or set up a new password because it was forgotten.

1. Go to the SMART login window.
2. Enter in the Employee ID.
3. Click Forgot Password button.

4. Enter in the requested information.
5. Click Continue.

Search Box

A Search box within the Quick Access group will assist users in finding a specific window/report within SMART Finance or SMART HR. To utilize this search, click in the Search box and type in the name of the window/report. The search function will auto highlight a selection based on what was typed in. Click enter to make the selection, use the arrow keys, or move the mouse to the selection. This window/report will appear on the desktop.

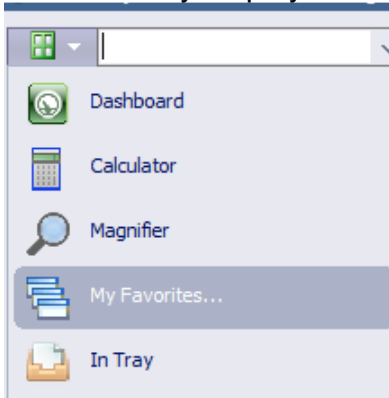


If there is a window/report that you search on, but it does not appear in the list, this may be due to your security access.

My Favorites

My Favorites is located under the Quick Access group. Within SMART Systems, you can create a favorites list of commonly used entry windows, summary windows, or

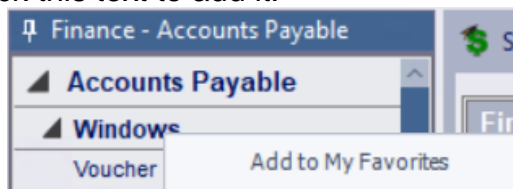
reports. It will keep track of a user's personally selected windows/reports. In addition, it will automatically display on the startup of SMART.



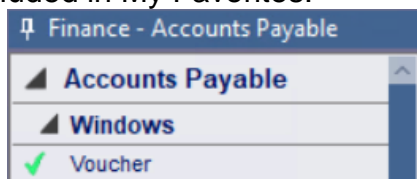
Adding to My Favorites

This process allows you to add a window/report to your personal My Favorites.

1. Go to the menu where the window/report is that you want to add.
2. Move the cursor over the text of the window/report you want to add.
3. Right click the mouse to bring up the "Add to My Favorites" button.
4. Click this text to add it.



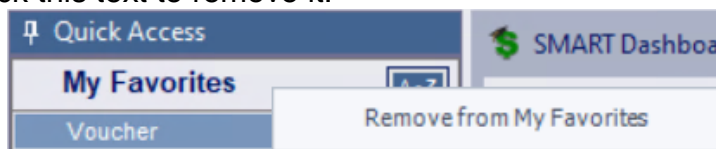
5. Once it has been selected, a green check mark will denote this window/report is included in My Favorites.



Removing from My Favorites

This process allows you to remove a window/report from your personal My Favorites.

1. Open My Favorites.
2. Move the cursor over the text of the window/report you want to remove.
3. Right click the mouse to bring up the "Remove from My Favorites" button.
4. Click this text to remove it.

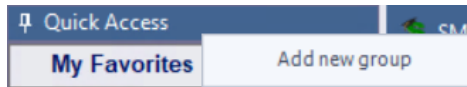


5. Once it has been selected, it will be removed from My Favorites and will no longer have a green check mark next to it.

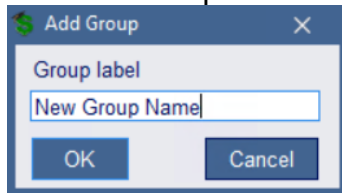
Adding a Favorite Group

This process allows a Group to be built within My Favorites. Then, multiple windows/reports can be added underneath the Group.

1. Open My Favorites.
2. Move the cursor over the My Favorites title.
3. Right click the mouse to bring up the “Add new group” button.
4. Click this text to add it.



5. Once it has been selected, an Add Group window will appear.
6. Enter in the Group name.



7. Click OK.
8. Now, the Group appears in My Favorites.




Removing a Favorite Group

This process allows you to remove a Group from your personal My Favorites.

1. Open My Favorites.
2. Move the cursor over the text of the Group you want to remove.
3. Right click the mouse to bring up the options.
 - a. Delete group – This option will remove the Group, but all windows/reports in the Group will stay in My Favorites.
 - b. Delete group all – This option will remove the Group along with all the windows/reports in the Group.
4. Click this text to remove it.
5. Now, the Group will be removed.

Adding Windows or Reports to a Group


This process will identify how to move windows/reports already in My Favorites to a Group.

1. Move the cursor over the window/report until the cursor becomes a hand  and is highlighted.
2. Hold down the left click of the mouse to select this window/report.
3. Drag it to the Group name you want it included in.
4. Now, you'll see the window/report under the Group name.



Removing Windows or Reports from a Group

This process will remove a window/report from a Group, but keep it in My Favorites.

1. Move the cursor over the window/report until the cursor becomes a hand  and is highlighted.
2. Hold down the left click of the mouse to select this window/report.
3. Drag it outside of the Group.
4. Now, you'll see the window/report not included in a Group.

Messaging

A SMART user can create a message to send to another SMART user. This process works similar to email, but in a more secure way. Users will need access to windows/reports to have information sent to them.

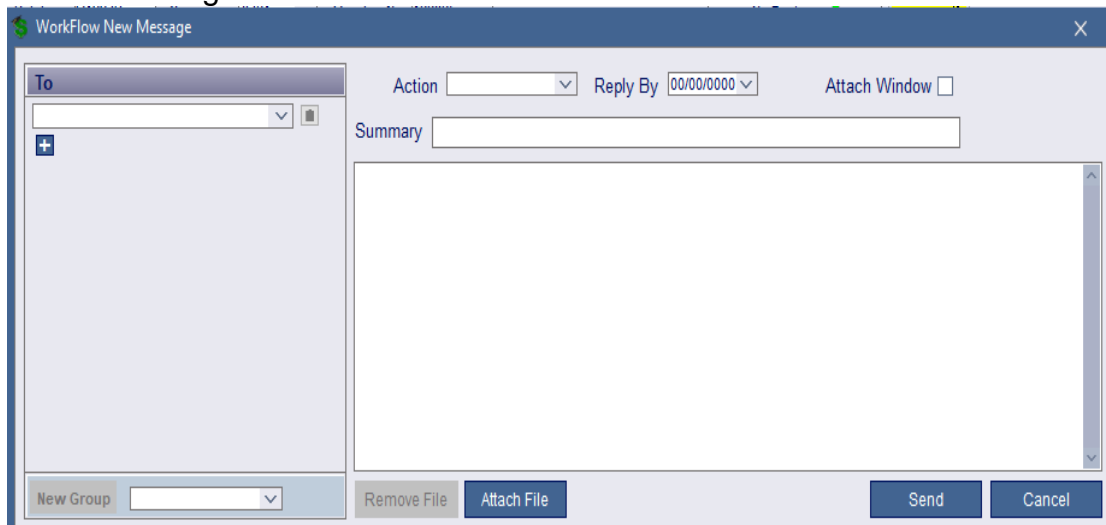
1. On the Messaging area, click the New button



OR

On a window, click the Workflow button  Workflow .

2. Fill in the following fields.

A screenshot of a 'WorkFlow New Message' dialog box. It has a 'To' field with a dropdown and a plus sign. To the right, there are fields for 'Action', 'Reply By' (with a date '00/00/0000'), and an 'Attach Window' checkbox. Below these is a 'Summary' text box. At the bottom, there is a 'New Group' dropdown, 'Remove File' and 'Attach File' buttons, and 'Send' and 'Cancel' buttons.

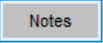

- a. To: Select a user(s) to denote who should receive this message.
- b. Action: Select an action from the drop-down list.
- c. Reply By: Specify a date, if the user(s) should respond to this message by a certain date.
- d. Attach Window: If active, click the checkbox to attach the window that is open when the Workflow button was clicked.
- e. Summary: Enter a short description. The box below it is to enter the message.
- f. Attach File: Click the Attach File button to add an attachment to the message. Up to three attachments per message can be sent to the recipient(s).
- g. Remove File: Click the Remove File button to remove an attached file.
- h. Send: Click the Send button to send the message.
- i. Cancel: Click the Cancel button to cancel the message and close the Message window.

Notes Button

SMART Systems has the ability to create a note that is tied to a record. This note can be text or it can include a file attachment. It will also follow the data in the areas of the program where record information is transferred. A user is able to view all notes not marked “Confidential”, but they can only modify their own notes.

Adding a Note in SMART Finance

This process will add a note in SMART Finance.

1. Click the Notes button .
2. Enter a brief description.
3. If more detail is needed, click on the plus sign next to the Date field to expand the note. The plus sign is highlighted yellow , if detailed notes are entered.

Date	Confidential	Description (Required)	Attachment	Active
02/22/2024	<input type="checkbox"/>	Sample Note		<input checked="" type="checkbox"/>


Note Added By: Groskreutz, Dianna



Add additional note comments.

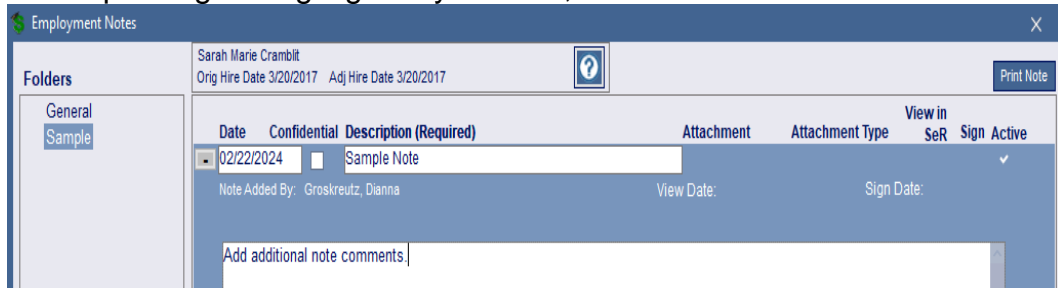
4. Click Save. The Notes button will highlight yellow .

Adding a Note in SMART HR

This process will add a note in SMART HR.

1. Click on the Notes button .
2. Select the Folder for the note to appear.



3. Click on the Insert Note button .
4. Enter a brief description.
5. If more detail is needed, click on the plus sign next to the Date field to expand the note. The plus sign is highlighted yellow , if detailed notes are entered.




6. Click Save. The Notes button will highlight yellow .

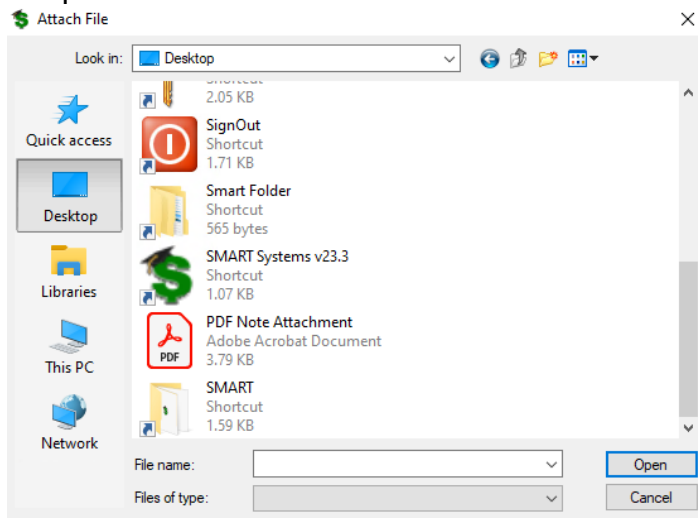
Adding an Attachment to a Note



There are two options for adding an attachment to the Notes button. They are the Add

Attachment button  or Drag Attachment Here box . There may be restrictions on the database for the allowable attachment types, like PDF, and the size of the file to be attached. After an attachment has been saved, the Notes button will show a paperclip.



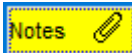
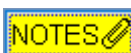
Add Attachment Button

1. Click Add Attachment button .
2. Locate the file location of the attachment.
3. Select the file.
4. Click Open.



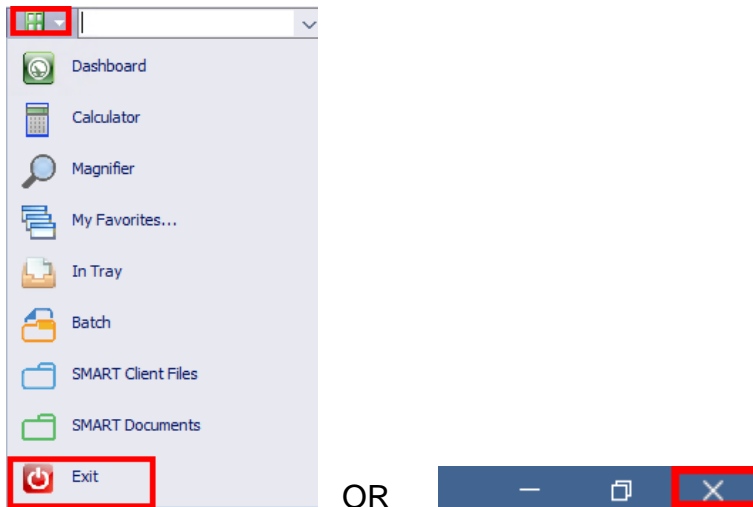
5. Click Save. The Notes button will show a paperclip  or .

Drag Attachment Here Box

1. Open File Explorer  in RDS.
2. Locate the file you want to attach to the Note.
3. Click on the file and drag it to the Drag Attachment Here box .
4. Click Save. The Notes button will show a paperclip  or .


Log Out of SMART

First, all windows should be closed. Then, you can either click on the Quick Access group → Exit or click on the “X” in the upper right-hand part of the screen, which will close SMART. See the screen shots below.



Log Out of RDS

First, make sure you are already logged off SMART. Once that has been done, you should see the startup screen as received when you first entered RDS. Double-click on

the SignOut button .