

This document contains a guide to the SMART Training Materials and how to use them

SMART Training Materials - Icon Guide: The **Icon Guide** document contains a comprehensive list of the icons used within all SMART Training Materials. The Icon Guide provides the user with a graphic example of each icon and a description for each icon.



Checklists

- Checklists are numbered and have a title
For example: *Checklist 1 – Cannot Pull PO into Voucher*
- Each Checklist document contains a 'Checkmark' graphic in the top left corner (as shown to the left of this text)
- Each Checklist is intended to help the end user address and trouble shoot a specific question or issue within SMART
- Each Checklist contains a comprehensive list of SMART Training Materials that relate to the Checklist question or the module area. For example: Foundation Information, Tools, UPK's, Scenarios, Examples, Job Aids, and Solution Articles



Foundation Information

- Foundation information provides important 'building block' information regarding SMART's basic functionality requirements which impact each SMART module and its business processes.
- Each Foundation Information section contains a 'brick wall' graphic (as shown to the left of this text)



Tools

- Tools are designed to provide information regarding key pages, important fields, or SMART components that can be used to research and view additional information pertaining to an issue or a module
- Tools are named by SMART Module, Tool number, and Title
For example: *PO Tool 1 – Activity Summary Page*
- Each Tool document contains a 'Tool Sign' graphic in the top left corner (as shown to the left of this text)



Scenarios

- Scenarios are designed to provide solutions to the 'Checklist' questions or issues
- Scenarios are associated to Checklists. Each Scenario contains a Scenario Number, and each scenario is named according to the issue it addresses. For example: *Scenario 1.1 – Voucher – Cannot pull PO into Voucher / PO - 'Use Procurement Card' Link Visible?*
- Each Scenario document contains: A 'Puzzle Piece' graphic in the top left corner (as shown to the left of this text), steps for decisions and resolutions, and a scenario explanation (in the yellow text box).

This page contains an overview of different shapes used in **flow charts** within the SMART Training Materials. *For example:* Flowcharts are used within 'Scenarios' and 'Tools' to document the decisions that need to be made, and the actions that need to be taken or performed.

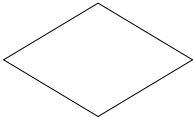


The rectangle shape represents a step in the process flow that the end user must complete.

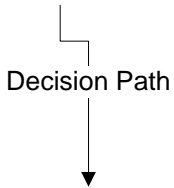


A rectangle with a vertical line down each side indicates a 'batch process'. The purpose of a batch process is to process the transaction information in SMART from one life cycle status to the next life cycle status.

Batch processes help the end users identify transaction errors in SMART. There are over 200 batch processes that run throughout the 14 modules of SMART. Some batch processes run hourly (between the hours of 9am – 4pm on business days), others run overnight, while others run only once a month, or once a fiscal year. Some batch processes work in only one module of SMART, while other batch processes run through multiple modules in SMART.



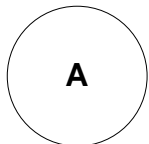
A diamond shape represents a decision point. This is a decision that needs to be made by the end user in SMART. Decision points are connected to their next steps by a 'connector', indicating which path the end user should take.



A 'connector' (arrow) indicates the direction in which the information is flowing. Any time a decision point (diamond shape) is encountered, the end user will be given a decision, and resulting decision paths based on the decision outcomes. The end user follows the desired path indicated by the connectors until a 'terminator' (oval or ellipse) shape is reached.



The oval or ellipse shape (known as a 'terminator') indicates the end of this decision path or business process flow. Additional notes or information may be provided in conjunction with the terminator shape.

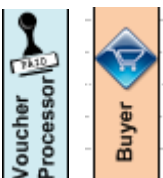


A circle shape indicates that the business process flow is too long or wide to fit on one page. If the use of a circle is necessary, a letter will be placed in the circle, such as a letter 'A' on 'page 1' of the business process flow (example shown at left). Then, when the end user goes to 'page 2' of the business process flow, they begin at the point of the 'A' in the circle on 'page 2', essentially picking back up in the flow where they left off.



Note: Note text will appear here

Annotations (Notes) are used when additional information is provided to supplement the information contained within the business process flow. Notes are accompanied by a note page icon (shown at left with a note example) to help you distinguish the note from the business process flow itself.



Each business process flow document contains a scenario, roles and modules:

- Each role is assigned a different color and is specified down the left hand side of the business process flow.
- Each module is assigned a different icon which is displayed adjacent to the role title.
- Each scenario explanation is provided in a yellow text box within the document.