



Smartetools Web App Navigation

User Guide

Revised 04/2018

Table of Contents

SMARTETOOLS WEB APP NAVIGATION	2
SCREEN LAYOUT	2
LOGIN	2
MENU BAR.....	3
MAIN MENU	3
STANDARD MENU AREA.....	4
DATE/TIME AREA	5
FISCAL YEAR AREA.....	6
PERSONALIZED MENU AREA	6
USER MENU	7
SESSION TIME-OUTS	8
RESPONSIVE SCREENS.....	8

SMARTETOOLS WEB APP NAVIGATION

SCREEN LAYOUT



Initially, the screen shows a basic menu and some messages from Smartetools that are updated from time to time. To get started, click on the Login button in the top right corner of the screen.

LOGIN

The Login form will appear in a popup window which will prompt for a Login Name, Password and optionally, a District.

A screenshot of the Smartetools User Login form. The form is titled 'Smartetools User Login' and is contained within a blue border. It features a header with the Smartetools logo and the version number 'v: 2.5.6596.32294'. The form includes three input fields: 'Login Name:', 'Password:', and 'District: - None -'. There is a checkbox labeled 'Use Smarte Login' and a 'Login' button at the bottom.

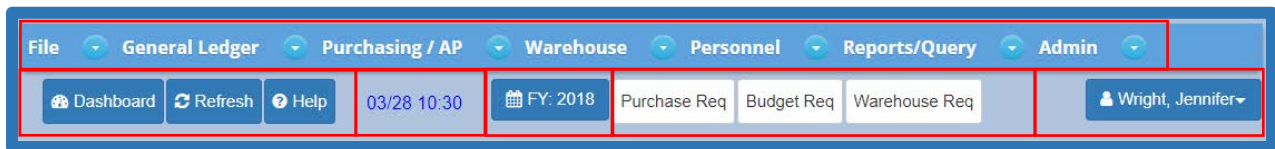
As with all popup windows, the Login window can be dismissed by:

- Clicking anywhere in the browser outside of the window.
- Clicking on the X or OK button in the lower right corner of the popup window.

Once the form has been completed, click on the OK button and Smartetools will authenticate your credentials and display the main screen.

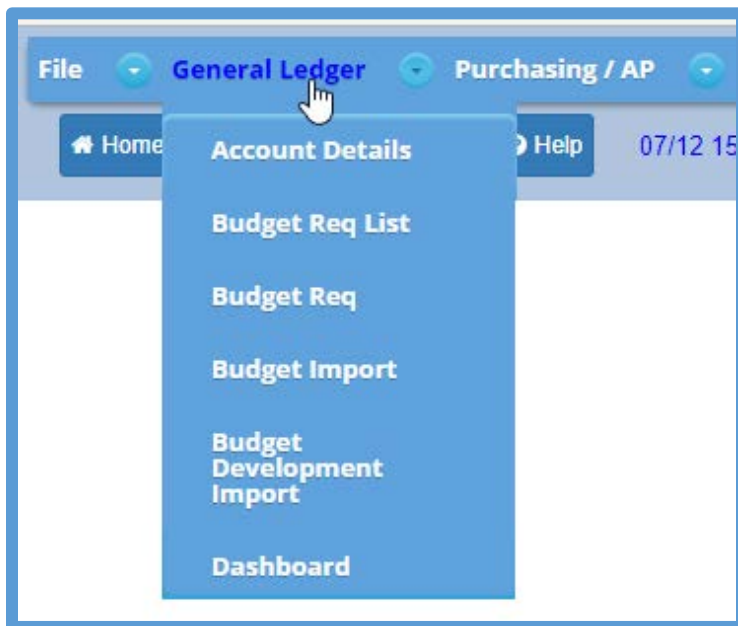
MENU BAR

The Menu Bar consists of 6 areas, each with a distinct purpose. You will see the Main Menu with functional areas, the Standard Menu area, date and time, fiscal year, Personalized Menu based on recent access, and the User Menu. As the user interacts with the Menu Bar, the main display area of the screen will be used to display the appropriate forms or popup windows.



MAIN MENU

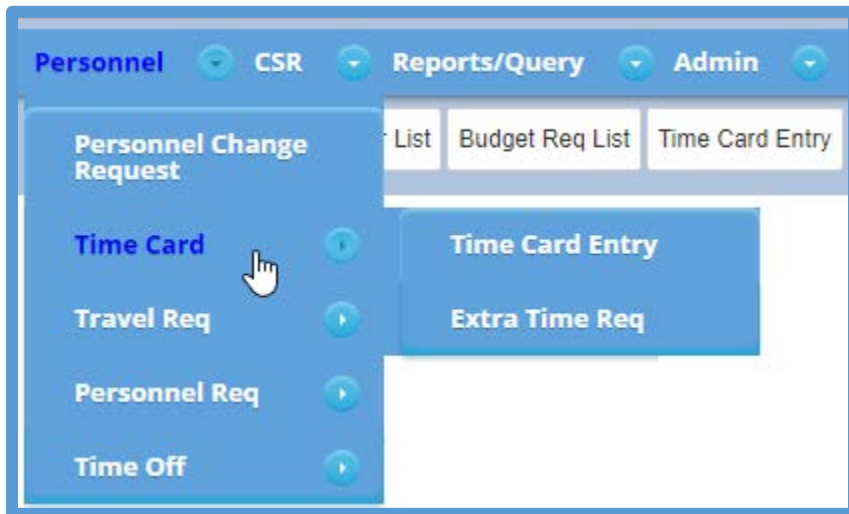
The main menu will show the options that are available to the currently logged-in user along with a personalized set of buttons to the user's most recently used pages.



The Main Menu extends across the top of the menu bar and contains all of the Smartetools that are available to the currently logged-in user.

The Main Menu shows the main functional areas and within each of these are the links to specific forms related to the functions. To show the drop-down sub-menu of available forms, hover the mouse over the desired functional area.

To make a selection, click on the desired form. The drop-down menu will disappear and the selected form will appear in the main screen area.

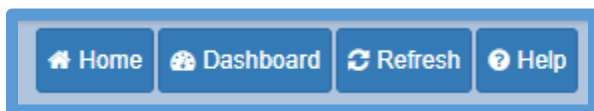


Some menus may have an additional sub-menu. These will be indicated with a round arrow button and can be expanded by hovering the mouse over the item.

To make a selection, click on the desired form. All layers of sub-menu will disappear and the selected form will appear in the main screen area

STANDARD MENU AREA

The Standard Menu Area appears directly below the Main Menu on the left side of the menu bar. The buttons on this menu are fixed and will always appear on the menu bar for all logged-in users.



HOME

The Home button will display the home page in the main display area. This is the same page that shows when the Smartetools web app is first started. It will usually contain useful information about the Smartetools system.

DASHBOARD

The Dashboard button will display useful information specific to the logged-in user, such as a list of pending documents that are awaiting user action along with links to the appropriate form for each of the documents.

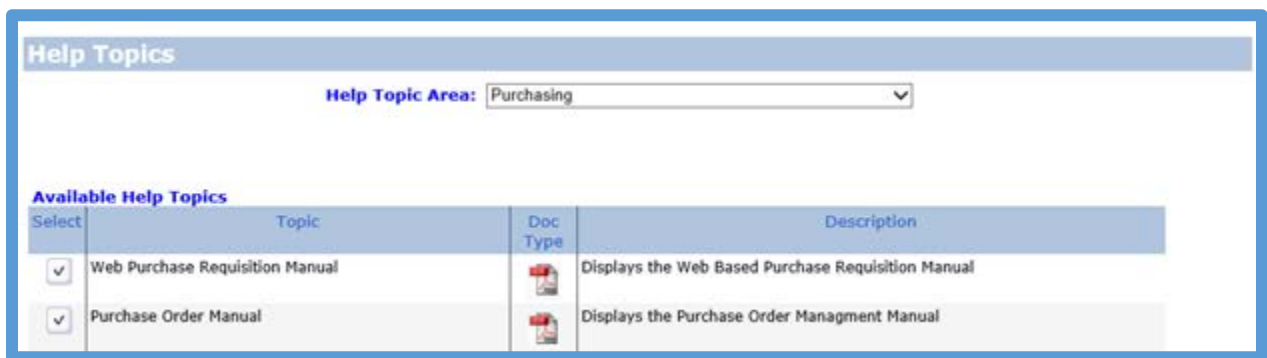
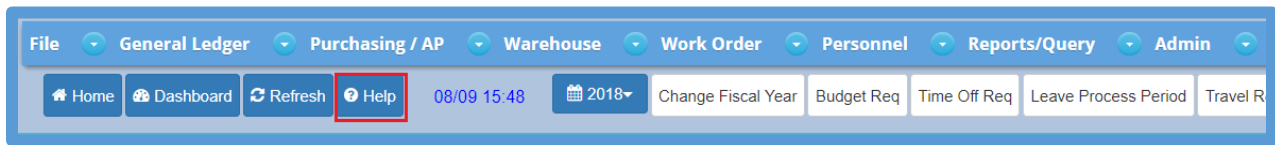
REFRESH

The Refresh button will refresh the current page. This will usually cause the page to revert to its initial state, so any unsaved data on the form may be lost.

HELP

The Help button will display a popup window containing the Smartetools Help Documentation. This will not impact the form the user is currently working on. As with all popup windows, the Help window can be dismissed by:

- Clicking anywhere in the browser outside of the window.
- Clicking on the X or OK button in the lower right corner of the popup window



DATE/TIME AREA

The Date/Time area simply shows the current date and time.

FISCAL YEAR AREA

The Fiscal Year Area shows the current fiscal year. If the user is working in a fiscal year that is not current, this will be indicated by showing the button in red. Users who are not working in the current fiscal year will also receive a reminder in a popup window when logging in.



CHANGE THE FISCAL YEAR

To change the fiscal year, click on the button and select the desired fiscal year from the list. Changing the fiscal year will result in all pages that are open in other browser tabs to refresh. Any unsaved data will be lost.

Select	FiscalYear	Open	Start Date	End Date	Name
Select	2017	Yes	07/01/2016	06/30/2017	Fiscal Year 2016-2017
Select	2019	Yes	07/01/2018	06/30/2019	Fiscal Year 2018-2019

PERSONALIZED MENU AREA

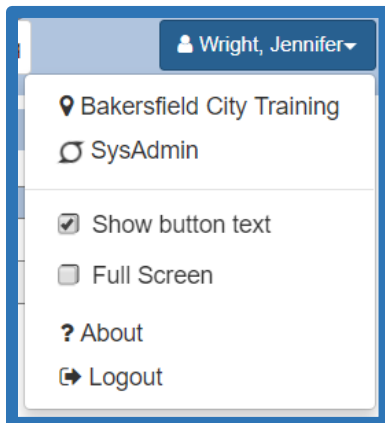
General Reports | Work Order List | Budget Req List | Time Card Entry | Work Order Req | Budget Req | Purchase Order List | Warehouse Req | Purchase Req | Purchase Order

The Personalized Menu Area contains a set of the most recently used buttons for the logged in user. When a selection is made from the Main Menu Area, a corresponding shortcut button will appear as the leftmost button in the Personalized Menu Area.

To directly access the forms that are most recently used by the current user, click on the shortcut button. This will display the form in the main screen area as if it had been selected from the Main Menu. The shortcut button will move to the left of the Personalized Menu Area.

The Personalized Menu Area is refreshed at login with the same set of buttons that were present when the user logged off.

USER MENU



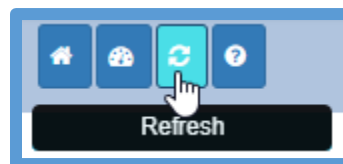
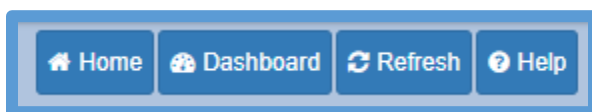
The User Menu shows the current user's name. If the user hovers over this button, additional information is shown.

DISTRICT INDICATOR

The name of the district will show as the first item in the drop-down list. This is for informational purposes only and can be changed at login when more than one district is available (eg: if there is a training district in addition to live data).

SHOW BUTTON TEXT

When selected, this will show the full text on all buttons in the Standard Menu Area. For compactness, the text can be removed from these buttons and they will show the text in a tooltip when the mouse hovers over the button. This will allow more space to show buttons in the Personalized Menu Area.



FULL SCREEN

When supported by the browser, the Full Screen button will toggle Full Screen Mode to maximize the size of the display area.

LOGOUT

The Logout button will end the current session and return to the Home page. Any data that has not been saved will be lost.

SESSION TIME-OUTS

When a user leaves a session idle for an extended period of time, the session will time-out as a security measure. If the user then returns to a session, the Login popup window will automatically show to allow the user to authenticate again. The page that the user was on when the session timed out will be refreshed. Any unsaved data that was on that page will be lost.

If the user logs in using a different Login Name or District than the original session, all open tabs in the browser will automatically refresh and any unsaved data in these tabs will be lost.

RESPONSIVE SCREENS

When the screen is too narrow to display the entire menu, the Main Menu will occupy two rows of the menu bar.

If the screen is very narrow, the menus will be replaced by overflow buttons and can be displayed by clicking on these buttons. The menus will then function in the same way as when they were fully displayed.

