SMART

Statewide Management, Accounting and Reporting Tool

Training Course Catalog

State of Kansas
Sunflower Project

As of February 10, 2010

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AM140: Introduction to Asset Management

Delivery Method: Web-Based Training

Duration: 2 hours, 20 minutes

Course Objectives:

- Define key Asset Management terminology
- Identify and describe the roles involved in the Asset Management module
- Explain the purpose and benefits of the Asset Management module
- Explain how Asset Management fits into SMART
- Describe how Asset Management integrates with other SMART modules

Prerequisites:

- GN101: Introduction to SMART

Required Roles:

- All Asset Roles

Course Outline:

- Lesson 1: Introduction to Asset Management
  - Topic 1: Defining Asset Management Terminology
  - Topic 2: Mapping State of Kansas Terminology to SMART
  - Topic 3: Understanding Benefits of Asset Management
- Lesson 2: Asset Management Process and Roles
  - Topic 1: Asset Management and SMART
  - Topic 2: Asset Management Processes
  - Topic 3: SMART Roles in Asset Management
- Lesson 3: Asset Management Integration
  - Topic 1: Sending Information to Asset Management from other SMART Modules
  - Topic 2: Receiving Information from Asset Management in other SMART Modules

AM340: Entering and Maintaining Assets

Delivery Method: Instructor-Led Training

Duration: 8 hours

Course Objectives:

- Understand assets and leases
- Enter and update assets
- Enter and update leases
- Integrate Asset Management with Purchasing, Accounts Payable, and Project Costing

Prerequisites:

- GN101: Introduction to SMART
- AM140: Introduction to Asset Management
- GN201: Introduction to Navigating in SMART

Required Roles:

- Agency Asset Processor
- Agency Asset Maintainer

AM340: Entering and Maintaining Assets (cont.)

Course Outline:

- Lesson 1: Understanding Assets and Leases
  - Topic 1: Key Concepts for Asset Management
  - Topic 2: Understanding Asset and Lease Processes
- Lesson 2: Entering and Updating Assets
  - Topic 1: Adding an Asset Using Express Add
  - Topic 2: Adding an Asset Using Basic Add
  - Topic 3: Copying an Existing Asset
  - Topic 4: Entering a Property Asset
  - Topic 5: Reviewing and Updating Asset Information
  - Topic 6: Adding Parent-Child Assets
  - Topic 7: Printing Asset Information
- Lesson 3: Entering and Updating Leases
  - Topic 1: Understanding Capital and Operating Leases
  - Topic 2: Entering a Capital Lease
  - Topic 3: Entering an Operating Lease
  - Topic 4: Entering a Lease Payment Schedule
  - Topic 5: Updating Lease Information
- Lesson 4: Integrating Purchasing, Accounts Payable, and Project Costing with Asset Management
  - Topic 1: Understanding Purchasing/Accounts Payable Integration
  - Topic 2: Understanding Project Costing Integration
  - Topic 3: Reviewing Asset Information in the Transaction Loader Table
  - Topic 4: Processing Unitization
  - Topic 5: Processing Consolidation
  - Topic 6: Understanding the Transaction Loader Process

AM341: Adjusting, Recategorizing, Transferring, and Retiring Assets

Delivery Method: Instructor-Led Training

Duration: 7 hours

Course Objectives:

- Understand asset adjustment, transfer, recategorization, retirement, and reinstatement
- Adjust and recategorize an asset
- Transfer assets within business units
- Retire and reinstate assets

Prerequisites:

- GN101: Introduction to SMART
- AM140: Introduction to Asset Management
- GN201: Introduction to Navigating in SMART

Required Roles:

- Agency Adjuster, Transfer, and Retirement Processor

AM341: Adjusting, Recategorizing, Transferring, and Retiring Assets (cont.)

Course Outline:

- Lesson 1: Understanding Asset Adjustment, Recategorization, Transfer, and Retirement
  - Topic 1: Key Concepts for Asset Adjustment, Recategorization, Transfer, and Retirement
  - Topic 2: Understanding Asset Adjustment, Recategorization, Transfer, and Retirement
- Lesson 2: Adjusting Assets
  - Topic 1: Understanding Asset Adjustments
  - Topic 2: Adjusting Asset Information
  - Topic 3: Recategorizing an Asset
- Lesson 3: Transferring Assets
  - Topic 1: Understanding Asset Transfers
  - Topic 2: Transferring an Asset within a Business Unit
  - Topic 3: Transferring an Asset between Business Units
- Lesson 4: Retiring and Reinstating Assets
  - Topic 1: Understanding Asset Retirement and Reinstatement
  - Topic 2: Retiring an Asset by Sale
  - Topic 3: Retiring an Asset by Trade-In
  - Topic 4: Retiring an Asset Using a Disposal Worksheet
  - Topic 5: Reinstating Assets

AM344: Processing Depreciation

Delivery Method: Web-Based Training

Duration: 2 hours, 30 minutes

Course Objectives:
- Explain depreciation and depreciation processing in SMART
- Run depreciation processes

Prerequisites:
- GN101: Introduction to SMART
- AM140: Introduction to Asset Management
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:
- Agency Depreciation Processor

Course Outline:
- Lesson 1: Understanding Depreciation
  - Topic 1: Understanding Depreciation Terminology
  - Topic 2: Understanding Depreciation Processes
- Lesson 2: Processing Depreciation
  - Topic 1: Calculating Depreciation for an Asset
  - Topic 2: Reviewing Depreciation Information
  - Topic 3: Running What-If Calculations
  - Topic 4: Understanding the Load Depreciation Process
  - Topic 5: Understanding the Depreciation Close Process

AP110: Introduction to Accounts Payable

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:

- Define key Accounts Payable terms
- Provide a clear explanation of the benefits of Accounts Payable in SMART
- List the roles involved in Accounts Payable
- Explain how Accounts Payable fits into SMART
- Describe how Accounts Payable integrates with other modules in SMART

Prerequisites:

- GN101: Introduction to SMART

Required Roles:

- All Accounts Payable Roles

Course Outline:

- Lesson 1: Introduction to Accounts Payable
    - Topic 1: Key Accounts Payable Terms
    - Topic 2: Crossmap of Accounts Payable Terms
    - Topic 3: Benefits of Accounts Payable in SMART
- Lesson 2: Accounts Payable Process and Roles
    - Topic 1: Accounts Payable in SMART
    - Topic 2: SMART Accounts Payable Process
    - Topic 3: Accounts Payable Roles
- Lesson 3: Accounts Payable Integration
    - Topic 1: General Ledger Integration
    - Topic 2: Asset Management Integration
    - Topic 3: Projects/Grants Integration
    - Topic 4: Purchasing Integration

AP310: Vendor Processing

Delivery Method: Instructor-Led Training

Duration: 3 hours, 30 minutes

Course Objectives:

- Explain the vendor process
- Describe how vendor processing integrates with other functions in SMART
- List the roles involved in vendor processing
- Search for a vendor
- Enter a vendor
- Request an update to the vendor master record

Prerequisites:

- GN101: Introduction to SMART
- AP110: Introduction to Accounts Payable
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency Vendor Processer

Course Outline:

- Lesson 1: Vendor Processing Overview
  - Topic 1: Vendor Processing Key Terms
  - Topic 2: Vendor Processing Concepts
  - Topic 3: Vendor Process, Integration, and Roles
- Lesson 2: Search for a Vendor
  - Topic 1: Search for a Vendor
  - Topic 2: View Vendor Information
- Lesson 3: Enter a Vendor
  - Topic 1: Enter a Vendor Process
  - Topic 2: Enter a Vendor
- Lesson 4: Modify a Vendor
  - Topic 1: Modify a Vendor

AP311: Voucher Processing

Delivery Method: Instructor-Led Training

Duration: 7 hours

Course Objectives:

- Define basic voucher terms
- Describe the voucher process in SMART, including the impacts to other modules
- Create a voucher without a purchase order
- Create a voucher with a purchase order
- Create a journal voucher
- Create a reversal voucher
- Manage vouchers
- Monitor control groups

Prerequisites:

- GN101: Introduction to SMART
- AP110: Introduction to Accounts Payable
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency AP Processor
- Agency AP Supervisor
- Agency AP Maintainer
- Agency AP Interfund Processor
- Agency AP Interfund Approver

AP311: Voucher Processing (cont.)

Course Outline:

- Lesson 1: Understanding Vouchers
  - Topic 1: Understanding the Accounts Payable Control Hierarchy
  - Topic 2: Voucher Key Terms and Concepts
  - Topic 3: Understanding the Voucher Process and Roles
  - Topic 4: Matching
  - Topic 5: Budget Checking
- Lesson 2: Create a Voucher without a Purchase Order
  - Topic 1: Create a Voucher without a Purchase Order Process
  - Topic 2: Create a Voucher without a Purchase Order
- Lesson 3: Create a Voucher with a Purchase Order
  - Topic 1: Create a Voucher with a Purchase Order Process
  - Topic 2: Create a Voucher with a Purchase Order
- Lesson 4: Create a Journal Voucher
  - Topic 1: Create a Journal Voucher
- Lesson 5: Create a Reversal Voucher
  - Topic 1: Create a Reversal Voucher Process
  - Topic 2: Create a Reversal Voucher
- Lesson 6: Managing Vouchers
  - Topic 1: 1099 Vouchers
  - Topic 2: Voucher Budget Checking Error Correction
- Lesson 7: Monitor Control Groups
  - Topic 1: Understanding Control Groups
  - Topic 2: Setting Up Control Groups

AP312: Advanced Voucher Processing

Delivery Method: Instructor-Led Training

Duration: 2 hours, 30 minutes

Course Objectives:
- Post a voucher
- Unpost a voucher
- Delete a voucher
- Close a voucher
- Complete a 1099 adjustment

Prerequisites:
- GN101: Introduction to SMART
- AP110: Introduction to Accounts Payable
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART
- AP311: Voucher Processing

Required Roles:
- Agency AP Supervisor

Course Outline:
- Lesson 1: Posting and Unposting Vouchers
  - Topic 1: Understanding Voucher Posting and Unposting
  - Topic 2: Post a Voucher
  - Topic 3: Unpost a Voucher
- Lesson 2: Deleting and Closing Vouchers
  - Topic 1: Understanding Deleting and Closing Vouchers
  - Topic 2: Delete a Voucher
  - Topic 3: Close a Voucher
- Lesson 3: 1099 Adjustments
  - Topic 1: Understanding 1099 Adjustments
  - Topic 2: Complete a 1099 Adjustment

AP313: Accounts Payable Maintenance

Delivery Method: Instructor-Led Training

Duration: 2 hours, 30 minutes

Course Objectives:
- Post a voucher
- Explain how journal generator is used and the impacts to the General Ledger
- View Expense Payments
- Journal Expense Reports
- Run Budget Checking in Expenses
- Monitor errors (posting, budget checking, matching)

Prerequisites:
- GN101: Introduction to SMART
- AP110: Introduction to Accounts Payable
- GN201: Introduction to Navigating in SMART
- AP311: Voucher Processing

Required Roles:
- Agency AP Maintainer

Course Outline:
- Lesson 1: Posting Vouchers and Journal Generation
  - Topic 1: Understanding Voucher Processing
  - Topic 2: Post a Voucher
  - Topic 3: Journal Generation
- Lesson 2: Travel and Expense Maintenance
  - Topic 1: Viewing expense payments
  - Topic 2: Journal expense reports
  - Topic 3: Run budget checking in expenses
- Lesson 3: Monitor Errors
  - Topic 1: Voucher Posting Errors
  - Topic 2: Matching Errors
  - Topic 3: Budgeting Checking Errors

AP314: Travel and Expense Processing

Delivery Method: Web-Based Training

Duration: 4 hours, 30 minutes

Course Objectives:

- Define basic travel and expense terms
- List the types of travel expenses that can be entered into SMART
- Describe how employee information (including banking information) is sent from SHARP to update the Travel and Expense Module
- List the roles and tasks involved in the Travel and Expense process
- Enter a travel authorization
- Enter a cash advance
- Enter an expense report

Prerequisites:

- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART

Required Roles:

- Agency Expense Processor
- Agency Expense Proxy
- Agency T&E Approvers
- Agency AP Maintainer
- Agency AP Workflow Maintainer

AP314: Travel and Expense Processing (cont.)

Course Outline:

- Lesson 1: Travel and Expense Overview
  - Topic 1: Key Travel and Expense Terms
  - Topic 2: The Travel and Expense Module
  - Topic 3: Key Roles in Travel and Expense
- Lesson 2: Entering a Travel Authorization in SMART
  - Topic 1: Business Purposes in Travel and Expense
  - Topic 2: Expense Types
  - Topic 3: Creating a Travel Authorization
  - Topic 4: Travel Authorization Status
- Lesson 3: Entering a Cash Advance in SMART
  - Topic 1: The Cash Advance Page
  - Topic 2: Business Purposes in Cash Advance
  - Topic 3: Cash Advance Status
- Lesson 4: Entering an Expense Report in SMART
  - Topic 1: Creating an Expense Report
  - Topic 2: The Expense Report Entry Page
  - Topic 3: Business Purposes in Expense Reporting
  - Topic 4: Expense Report Status
- Lesson 5: Printing Travel Documents in SMART
  - Topic 1: Printing Travel Documentation in SMART

AP316: Accounts Payable Workflow Maintenance

Delivery Method: Web-Based Training

Duration: 2 hours, 30 minutes

Course Objectives:
- Explain the Travel and Expense Workflow Process
- Explain the Voucher Workflow Process
- Explain how employee information is interfaced from SHARP
- Update Expense Payee Profiles
- Assign Expense Proxies
- Maintain Voucher Workflow Assignments

Prerequisites:
- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART
- AP311: Voucher Processing
- AP314: Travel and Expense Processing

Required Roles:
- Agency AP Workflow Maintainer

Course Outline:
- Lesson 1: Workflow Overview
    - Topic 1: The Travel and Expense Workflow Process
    - Topic 2: The Voucher Workflow Process
    - Topic 3: Key Workflow Terms
    - Topic 4: The Agency Workflow Maintainer Role
- Lesson 2: Maintaining Travel and Expense Workflow
    - Topic 1: Expense Payee Information in SMART
    - Topic 2: Updating the Expense Payee Profile
    - Topic 3: Assigning Proxies for an Expense Payee
- Lesson 3: Maintaining Voucher Workflow
    - Topic 1: Voucher Workflow Assignments in SMART

AR150: Introduction to Accounts Receivable and Billing

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Define key Accounts Receivable and Billing terms
- Crossmap existing State terms with SMART Accounts Receivable and Billing terms
- List the benefits of Accounts Receivable and Billing
- Describe how Accounts Receivable and Billing works in SMART
- Describe the Accounts Receivable and Billing process
- List Accounts Receivable and Billing roles and their activities
- Describe the integration between Accounts Receivable and Billing with other SMART process areas

Prerequisites:
- GN101: Introduction to SMART

Required Roles:
- All Accounts Receivable and Billing Roles

Course Outline:
- Lesson 1: Introduction to Accounts Receivable and Billing
  - Topic 1: Accounts Receivable and Billing Key Terms
  - Topic 2: Crossmap of Accounts Receivable and Billing Terms
  - Topic 3: Accounts Receivable and Billing Benefits
- Lesson 2: Accounts Receivable and Billing Processes and Roles
  - Topic 1: Accounts Receivable and Billing in SMART
  - Topic 2: Accounts Receivable and Billing Processes
  - Topic 3: Accounts Receivable and Billing Roles
- Lesson 3: Accounts Receivable and Billing Integration
  - Topic 1: Overview
  - Topic 2: Grants, Contracts, and Project Costing
  - Topic 3: Billing Integration
  - Topic 4: Accounts Receivable Integration
  - Topic 5: General Ledger Integration

AR350: Maintaining Customers

Delivery Method: Instructor-Led Training

Duration: 4 hours

Course Objectives:

- List and define all primary and additional customer roles
- Describe the changes from the existing State customer maintenance process to the SMART customer maintenance process
- Explain the end-to-end process for Accounts Receivable and Billing and how customers fit into that process
- List roles involved in the customer maintenance process
- Enter, copy, and add general information to new customers
- Update customer information

Prerequisites:

- GN101: Introduction to SMART
- AR150:Introduction to Accounts Receivables and Billing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency AR Administrator
- Agency Billing Administrator
- Agency Customer Creator
- Agency AR Configurator
- Agency Billing Configurator

AR350: Maintaining Customers (cont.)

Course Outline:

- Lesson 1: Understanding Customers
    - Topic 1: Who are customers in SMART?
    - Topic 2: Understanding Customers
- Topic Lesson 2: Creating Customers
    - Topic 1: Entering a Customer
    - Topic 2: Copying a Customer
    - Topic 3: Quick Customer Create
- Lesson 3: Updating and Maintaining Customer
    - Topic 1: Updating Customer Types and General Customer Information
    - Topic 2: Customer Correspondence Options
    - Topic 3: Messages
    - Topic 4: Attachments

AR351: Creating and Maintaining Receivables

Delivery Method: Instructor-Led Training

Duration: 6 hours

Course Objectives:
- Understand receivables terms
- Understand the end-to-end process for receivables in the Accounts Receivables and Billing modules
- Enter receivables with specific information
- Know when the batch receivables update (AR Update) has been completed
- Maintain and update receivables with specific information
- Understand transfer receivables
- Understand account aging and communication
- Understand collections and exceptions management

Prerequisites:
- GN101: Introduction to SMART
- AR150: Introduction to Accounts Receivable and Billing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:
- Agency Pending Item Processor
- Agency AR Maintainer
- Agency AR Configurator

AR351: Creating and Maintaining Receivables (cont.)

Course Outline:

- Lesson 1: Introduction to Receivables
  - Topic 1: Introduction to Receivables
  - Topic 2: Receivables Process
- Lesson 2: Entering and Reviewing Receivables
  - Topic 1: Working with Pending Items
  - Topic 2: All Items with Detail
  - Topic 3: Updating Pending Items
- Lesson 3: Maintaining and Updating Receivables
  - Topic 1: Change Item Pay Terms
  - Topic 2: Maintenance Worksheets
  - Topic 3: Multi-Item Update
  - Topic 4: Unposting Item Groups
- Lesson 4: Transferring Receivables
  - Topic 1: Using Worksheet Actions
- Lesson 5: Account Aging and Communication
  - Topic 1: Aging Summary by Unit Report
  - Topic 2: Processing and Printing Customer Statements
  - Topic 3: Processing and Printing Dunning Letters
- Lesson 6: Collections and Exception Management
  - Topic 1: Viewing Customer History
  - Topic 2: Customer Account Overview
  - Topic 3: Viewing Item Groups
  - Topic 4: Disputing Items and Adding a Conversation

AR352: Creating and Maintaining Deposits

Delivery Method: Instructor-Led Training

Duration: 4 hours

Course Objectives:

- Explain the end-to-end process of deposits including key terms and user roles
- Explain different payment and deposit types including viewing, processing, setting entries to post and updating
- Enter deposits with and without items
- Create and finalize payment worksheets
- Explain payment predictor
- Enter deposits with overpayments and underpayments
- Review deposit information

Prerequisites:

- GN101: Introduction to SMART
- AR150: Introduction to Accounts Receivable and Billing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency Deposit Processor
- Agency AR Administrator
- Agency AR Interfund Processor
- Agency AR Interfund Approver

AR352: Creating and Maintaining Deposits (cont.)

Course Outline:

- Lesson 1: Deposits Overview
  - Topic 1: Defining Deposits
  - Topic 2: End-to-End Process of Deposits
  - Topic 3: Deposit Roles
- Lesson 2: Entering Payments
  - Topic 1: Key Deposit Concepts
  - Topic 2: Payment Lifecycle and Payment Status
  - Topic 3: Entering and Posting Regular Deposits
  - Topic 4: Entering Direct Journal Payments and Direct Journal Deposits
  - Topic 5: Entering and Posting Deposit Adjustments
- Lesson 3: Applying Payments
  - Topic 1: End-to-End Process of Receivable Update
  - Topic 2: Using Worksheet Selection
  - Topic 3: Using Worksheet Applications
  - Topic 4: Using Worksheet Actions
  - Topic 5: Building a Worksheet for an Unidentified Payment
  - Topic 6: Viewing a Partial Payment on a Worksheet
  - Topic 7: Applying Payments on a Worksheet
  - Topic 8: Creating and Setting Entries to Post
  - Topic 9: Viewing Payment Activities
- Lesson 4: Reviewing Payments
  - Topic 1: Viewing All Deposits
  - Topic 2: Viewing Cash Received by a Business Unit
  - Topic 3: Viewing Payment Groups
  - Topic 4: Viewing Incomplete Payments
  - Topic 5: Reviewing Payment Predictor

AR353: Creating and Processing Billing

Delivery Method: Instructor-Led Training

Duration: 6 hours

Course Objectives:

- Understand specific billing terms
- Enter bills online
- Create recurring bills
- Research bills
- Generate invoices
- Adjust bills

Prerequisites:

- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART
- AR150: Introduction to Accounts Receivable and Billing
- AR350: Maintaining Customers

Required Roles:

- Agency Billing Processor
- Agency Billing Administrator
- Agency Billing Configurator

AR353: Creating and Processing Billing (cont.)

Course Outline:

- Lesson 1: Billing Overview
  - Topic 1: Key Billing Concepts
  - Topic 2: End-to-End Billing Process
  - Topic 3: Billing Roles
- Lesson 2: Entering Bills Online
  - Topic 1: Online Bill Entry
  - Topic 2: Creating Charge Codes
  - Topic 3: Revenue Distribution Codes
  - Topic 4: Enter Express Bills
  - Topic 5: Updating Bills
- Lesson 3: Create Recurring Bills
  - Topic 1: Creating Bill Templates
  - Topic 2: Running the Generate Recurring Bills Process
- Lesson 4: Researching Bills
  - Topic 1: Researching Bills Overview
  - Topic 2: Researching Invoiced Bill Lines
  - Topic 3: Researching Non-Invoiced Bill Lines
  - Topic 4: Researching Invoiced Bills
  - Topic 5: Researching Non-Invoiced Bills
- Lesson 5: Processing and Printing Pro Formas
  - Topic 1: Process Pro Formas
- Lesson 6: Adjusting Bills
  - Topic 1: Key Concepts
  - Topic 2: Credit a Bill
  - Topic 3: Credit an Entire Bill and Rebill
  - Topic 4: Credit a Bill Line and Apply to an Existing Bill
  - Topic 5: Creating a Net Bill Line Reversal and Rebill
  - Topic 6: Creating a Bill Line Adjustment

AR354: Advanced Billing Processing

Delivery Method: Instructor-Led Training

Duration: 4 hours

Course Objectives:

- Define key Billing terms, processes, and roles
- Create consolidated bills
- Copy groups of bills
- Manage installment bills

Prerequisites:

- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART
- AR150: Introduction to Accounts Receivable and Billing
- AR350: Maintaining Customers
- AR353: Creating and Processing Billing

Required Roles:

- Agency Billing Administrator
- Agency Billing Processor
- Agency Billing Configurator

AR354: Advanced Billing Processing (cont.)

Course Outline:

- Lesson 1: Advance Billing Overview
  - Topic 1: Advanced Billing Overview
  - Topic 2: End-to-End Billing Process
  - Topic 3: Billing Roles
- Lesson 2: Creating Consolidated Bills
  - Topic 1: Processing and Printing Consolidated Bills
  - Topic 2: Process Invoices
  - Topic 3: Review Accounts Receivable for Consolidated Bills
- Lesson 3: Managing Bill Groups
  - Topic 1: Copying Bills Overview
  - Topic 2: Enter and Copying an Existing Bill
  - Topic 3: Define Copy Group Header and Detail
  - Topic 4: Run Bill Copying Group Process and Amend a New Bill
- Lesson 4: Manage Installment Bills
  - Topic 1: Defining Installment Bill Plan
  - Topic 2: Enter an Installment Bill
  - Topic 3: Building an Installment Bill Schedule
  - Topic 4: Running the Installment Bill Process

AR355: Processing Interfund Transactions

Delivery Method: Instructor-Led Training

Duration: 5 hours

Course Objectives:
- Describe the Interfund process
- Navigate to and use Interfund pages
- Enter, link, and update Interfund transactions
- Approve and manage Interfund transactions

Prerequisites:
- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART
- AP311: Voucher Processing (Agency AP Interfund Processor and Agency AP Interfund Approver roles)
- AR352: Creating and Maintaining Deposits (Agency AR Interfund Processor and Agency AR Interfund Approver roles)

Required Roles:
- Agency AP Interfund Processor
- Agency AP Interfund Approver
- Agency AR Interfund Processor
- Agency AR Interfund Approver

AR355: Processing Interfund Transactions (cont.)

Course Outline:

- Lesson 1: Understanding Interfund Processing
  - Topic 1: Understanding Interfund Processing in SMART
  - Topic 2: Key Terms
  - Topic 3: Cross-map Interfund Processing
  - Topic 4: Interfund Processes and Roles
- Lesson 2: Basic Interfund Activities
  - Topic 1: Using the Interfund Search Page
  - Topic 2: Navigating the Interfund Page
- Lesson 3: Adding and Linking Interfund Transactions
  - Topic 1: Adding Initiating Interfund Deposits
  - Topic 2: Adding Reciprocating Interfund Deposits
  - Topic 3: Linking Existing Interfund Deposits
  - Topic 4: Adding Initiating Interfund Vouchers
  - Topic 5: Adding Reciprocating Interfund Vouchers
  - Topic 6: Linking Existing Interfund Vouchers
  - Topic 7: Deleting Interfunds
- Lesson 4: Approving and Managing Interfund Transactions
  - Topic 1: Approving Interfund Deposits
  - Topic 2: Approving Interfund Vouchers
  - Topic 3: Sending Interfund Notifications
  - Topic 4: Handling Interfund Errors

GL130: Introduction to General Ledger

Delivery Method: Web-Based Training

Duration: 5 hours

Course Objectives:

- Define basic General Ledger and Commitment Control terms
- List the benefits that General Ledger and Commitment Control in SMART provide for the end user, agency, and State of Kansas
- Describe the General Ledger and Commitment Control processes in SMART and how both fit into the overall SMART process
- List the roles involved in General Ledger and Commitment Control and activities associated with those roles
- Explain how General Ledger and Commitment Control integrate with other modules in SMART
- Explain how General Ledger integrates with the SHARP Payroll process
- Describe the process by which agency budget information moves from the Kansas Internet Budget and Reporting System (IBARS) to SMART
- Describe the State of Kansas Chart of Accounts
- Explain how modified accrual differs from cash basis accounting
- Describe the Period and Year-end closing processes in SMART

Prerequisites:

- GN101: Introduction to SMART

Required Roles:

- All General Ledger and Commitment Control Roles

GL130: Introduction to General Ledger (cont.)

Course Outline:

- Lesson 1: Introduction to General Ledger
  - Topic 1: General Ledger Key Terms and Concepts
  - Topic 2: Key General Ledger Benefits
- Lesson 2: General Ledger Process and Roles
  - Topic 1: General Ledger Process
  - Topic 2: General Ledger Roles
- Lesson 3: General Ledger Integration
  - Topic 1: Integration of General Ledger in SMART
  - Topic 2: Integration of General Ledger with Payroll
- Lesson 4: Introduction to Commitment Control
  - Topic 1: Commitment Control Defined
  - Topic 2: Key Commitment Control Terms and Concepts
  - Topic 3: Key Commitment Control Benefits
- Lesson 5: Commitment Control Process and Roles
  - Topic 1: Commitment Control in SMART
  - Topic 2: Commitment Control Process
  - Topic 3: Commitment Control Roles
  - Topic 4: Commitment Control Integration
- Lesson 6: Understanding SMART Ledgers
  - Topic 1: ACTUALS Ledger
  - Topic 2: Statistical Ledgers
  - Topic 3: Budget Ledgers
- Lesson 7: Understanding the Close Process
  - Topic 1: Month End Processing
  - Topic 2: Year End Processing
  - Topic 3: Key Concepts in Closing Process

GL330: Processing Journal Entries

Delivery Method: Instructor-Led Training

Duration: 8 hours

Course Objectives:

- Describe the State of Kansas Journal end to end journal process
- List the roles involved in the journal process and explain how the roles fit into the activities in journal processing
- Define key journal terms and concepts
- Enter journals online
- Enter journals using spreadsheet upload
- Perform journal inquiries

Prerequisites:

- GN101: Introduction to SMART
- GL130: Introduction to General Ledger
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Kansas GL Processor
- Kansas GL Approver Roles
- Kansas Reporting Ledger Processor
- Kansas Reporting Ledger Approver

GL330: Processing Journal Entries (cont.)

Course Outline:

- Lesson 1: Journal Entry Overview
  - Topic 1: Key Concepts in the Journal Process
  - Topic 2: End-to-End Journal Process
  - Topic 3: State of Kansas Ledgers
- Lesson 2: Creating a Journal Entry in SMART
  - Topic 1: Creating a New Journal Entry
  - Topic 2: Saving a Journal with Incomplete Status
  - Topic 3: Control Totals
  - Topic 4: Copying a Journal Entry
- Lesson 3: Importing Spreadsheet Journals in SMART
  - Topic 1: Spreadsheet Journals Overview
  - Topic 2: Spreadsheet Journal File Requirements
  - Topic 3: Creating a Spreadsheet Journal
  - Topic 4: Importing a Spreadsheet Journal
- Lesson 4: Processing Journals
  - Topic 1: Journal Edit Process
  - Topic 2: Errors in Journal Processing
  - Topic 3: Correcting Journal Errors
  - Topic 4: Approving Journals to Post
- Lesson 5: Reviewing Journals in SMART
  - Topic 1: Reviewing Journal Status
  - Topic 2: The Ledger Inquiry Page
  - Topic 3: Performing a Journal Inquiry

GL331: Processing Budget Journals

Delivery Method: Instructor-Led Training

Duration: 5 hours

Course Objectives:
- Define basic budget journal terms
- Choose a budget journal type
- Demonstrate the steps to successfully import a spreadsheet budget journal
- Create and review Budget Overview inquiries
- Describe the types of errors that might occur during the budget journal post process, including security errors, ChartField errors, and translation errors

Prerequisites:
- GN101: Introduction to SMART
- GL130: Introduction to General Ledger
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:
- Agency Budget Processor
- Agency Budget Approver

GL331: Processing Budget Journals (cont.)

Course Outline:

- Lesson 1: Budget Journal Entry Key Terms, Processes, and Roles
  - Topic 1: Key Concepts
  - Topic 2: End-to-End Budget Journal Process
  - Topic 3: Budget Journal Roles
  - Topic 4: State of Kansas Ledgers
- Lesson 2: Creating a Budget Journal Entry in SMART
  - Topic 1: Understanding Budget Journal Types
  - Topic 2: Creating a New Budget Journal Entry
  - Topic 3: Copy a Budget Journal
  - Topic 4: Budget Transfers
  - Topic 5: Budget Adjustments
- Lesson 3: Importing Spreadsheet Budget Journals in SMART
  - Topic 1: Spreadsheet Budget Journals
  - Topic 2: Spreadsheet Journal File Requirements
  - Topic 3: How to Upload a Spreadsheet Budget Journal
- Lesson 4: Processing Budget Journals
  - Topic 1: Budget Journal Posting
  - Topic 2: View and Correct Budget Journal Errors
- Lesson 5: Reviewing Budget Journals in SMART
  - Topic 1: Budget Overview
  - Topic 2: Ledger Inquiry Set
  - Topic 3: The Detail Budget Maintenance Page

GN101: Introduction to SMART

Delivery Method: Web-Based Training

Duration: 2 hours, 25 minutes

Course Objectives:
- Define key SMART terms and explain why SMART is being implemented by the State of Kansas
- List benefits of SMART
- Explain implementation timeline for SMART
- List modules and functionality of SMART and major functions of each module
- Describe the end-to-end process of SMART
- Explain the State of Kansas Chart of Accounts and ChartFields
- Describe the training program for SMART and training materials available for end-users
- Describe the help tools available for end-users of SMART

Prerequisites:
- Must have a basic familiarity of the Microsoft Windows[1] environment and web navigation

Required Roles:
- All SMART users

[1] *Microsoft Windows is a registered trademark of Microsoft Corporation in the United States and/or other countries.*

GN101: Introduction to SMART (cont.)

Course Outline:

- Lesson 1: Introduction to SMART
  - Topic 1: SMART Defined
  - Topic 2: History of SMART
  - Topic 3: Benefits of SMART

- Lesson 2: SMART Functionality
  - Topic 1: SMART End-to-End Process
  - Topic 2: General Ledger
  - Topic 3: Accounts Payable
  - Topic 4: Accounts Receivable
  - Topic 5: Asset Management
  - Topic 6: Project/Grants
  - Topic 7: Purchasing
  - Topic 8: Time and Labor

- Lesson 3: SMART Key Concepts
  - Topic 1: Chart of Accounts and ChartFields
  - Topic 2: Additional Key Concepts

- Lesson 4: SMART Training and Help Tools
  - Topic 1: SMART Training Program
  - Topic 2: Help Tools

GN201: Introduction to Navigating in SMART

Delivery Method: Web-Based Training

Duration: 4 hours

Course Objectives:

- Sign in and out of SMART
- Describe how security roles determine what pages and page items can be accessed and what information can be updated
- Set favorite pages
- Navigate to pages
- Perform searches
- Navigate within pages
- Describe the differences between required fields and optional fields
- List the data entry field types and their use
- Explain effective dating in SMART

Prerequisites:

- GN101: Introduction to SMART

Required Roles:

- All SMART users

GN201: Introduction to Navigating in SMART (cont.)

Course Outline:

- Lesson 1: Accessing SMART
  - Topic 1: SMART Access
  - Topic 2: Security

- Lesson 2: SMART Home Page
  - Topic 1: Menu Layout
  - Topic 2: Navigation Links

- Lesson 3: SMART Searches
  - Topic 1: Common Buttons
  - Topic 2: Basic Search
  - Topic 3: Advanced Search
  - Topic 4: Saving Searches
  - Topic 5: Operations and Wildcards
  - Topic 6: Find Feature

- Lesson 4: Page Navigation
  - Topic 1: Page Navigation
  - Topic 2: Page Controls
  - Topic 3: Adding and Updating Data
  - Topic 4: Using Grids

GN203: Performing Approvals

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:

- Explain how workflow is used in SMART
- List the roles involved in the workflow process and the activities performed by each role
- Describe two benefits of using workflow
- Access workflow
- Explain the worklist options and the process steps required after each option has been used
- Approve a work list item in your worklist

Prerequisites:

- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART

Required Roles:

- Agency Purchasing Approver Roles
- Agency AP Approver Roles
- Agency T&E Approver Roles
- Kansas GL Approver Roles

GN203: Performing Approvals (cont.)

Course Outline:

- Lesson 1: Workflow Overview
  - Topic 1: Benefits of Using Workflow
  - Topic 2: Workflow Processes
  - Topic 3: Accessing Your Worklist
- Lesson 2: Purchasing Workflow
  - Topic 1: Requisition Approval Process
  - Topic 2: Delete a Requisition Approval
- Lesson 3: Accounts Payable Workflow
  - Topic 1: Voucher Approval
  - Topic 2: Expense Approval
  - Topic 3: Reassign Expense Approval
- Lesson 4: General Ledger Workflow
  - Topic 1: Journal Approval Process

PC160: Introduction to Projects/Grants

Delivery Method: Web-Based Training

Duration: 2 hours, 30 minutes

Course Objectives:

- Define key Projects/Grants terminology
- Identify and describe the roles involved in Projects/Grants
- Explain the purpose and benefits of the Projects, Contracts, and Grants modules
- Explain how Projects/Grants fits into SMART
- Describe how the Projects, Contracts, and Grants modules integrate with other SMART modules

Prerequisites:

- GN101: Introduction to SMART

Required Roles:

- All Projects and Grants Roles

Course Outline:

- Lesson 1: Introduction to Projects/Grants
  - Topic 1: Defining Projects/Grants Terminology
  - Topic 2: Crossmapping Projects/Grants Terminology
  - Topic 3: Benefits of Projects/Grants
- Lesson 2: Projects/Grants Processes and Roles
  - Topic 1: Projects/Grants and SMART
  - Topic 2: Projects/Grants Processes
  - Topic 3: SMART Roles for Projects/Grants
- Lesson 3: Projects/Grants Integration
  - Topic 1: Integrating Projects/Grants with other SMART Modules

PC360: Managing Projects

Delivery Method: Instructor-Led Training

Duration: 5 hours

Course Objectives:
- Enter and maintain projects
- Analyze projects
- Understand and explain the integration of projects with other SMART modules

Prerequisites:
- GN101: Introduction to SMART
- PC160: Introduction to Projects/Grants
- GN201: Introduction to Navigating in SMART

Required Roles:
- Agency Projects Manager

PC360: Managing Projects (cont.)

Course Outline:

- Lesson 1: Understanding Projects
  - Topic 1: Key Concepts for Project Costing
  - Topic 2: Understanding Project Processes

- Lesson 2: Entering and Maintaining Projects
  - Topic 1: Understanding Project Creation
  - Topic 2: Creating a Project
  - Topic 3: Creating a Project Activity
  - Topic 4: Understanding Project Transactions
  - Topic 5: Closing Projects

- Lesson 3: Analyzing Projects
  - Topic 1: Understanding Project Analysis
  - Topic 2: Understanding Project Trees
  - Topic 3: Viewing the Project Transaction Summary and Project Costs

- Lesson 4: Integrating Projects with other SMART Modules
  - Topic 1: Capitalizing a Project Asset (AM)
  - Topic 2: Understanding Project Allocations (GL)
  - Topic 3: Understanding Actual Costs Collection from Journal Entries (GL)
  - Topic 4: Understanding Committed Costs Collection from a Purchase Order (PO)
  - Topic 5: Understanding Actual Costs Collection from a Voucher (AP)
  - Topic 6: Understanding Actual Cots Collection from an Expense (EX)
  - Topic 7: Understanding Labor Costs Collection (TL)

PC361: Managing Customer Contracts

Delivery Method: Instructor-Led Training

Duration: 8 hours

Course Objectives:
- Create and maintain contracts
- Work with billing and revenue recognition plans
- Manage revenue and contracts billing
- Process prepaid amounts
- Integrate contracts with other SMART modules

Prerequisites:
- GN101: Introduction to SMART
- PC160: Introduction to Projects/Grants
- GN201: Introduction to Navigating in SMART

Required Roles:
- Agency Customer Contracts Manager

PC361: Managing Customer Contracts (cont.)

Course Outline:

- Lesson 1: Understanding Contracts
  - Topic 1: Defining Key Terms for Contracts
  - Topic 2: Understanding Contract Processes
- Lesson 2: Creating and Maintaining Contracts
  - Topic 1: Understanding Contracts, Milestones, and Amendments
  - Topic 2: Creating a Contract
  - Topic 3: Activating a Contract
  - Topic 4: Creating and Updating a Milestone
  - Topic 5: Creating an Amendment
  - Topic 6: Closing a Contract
- Lesson 3: Processing Prepaid Amounts
  - Topic 1: Understanding Prepaids
  - Topic 2: Defining and Associating Prepaid Amounts
  - Topic 3: Managing Additional Prepaid Activities
  - Topic 4: Setting Up Prepaid Billing
  - Topic 5: Setting Up Deferred Revenue Distribution
- Lesson 4: Integrating Contracts with other SMART Modules
  - Topic 1: Integrating Contracts with Projects and Billing
  - Topic 2: Understanding the Contracts/Billing Interface

PC362: Managing Grants

Delivery Method: Instructor-Led Training

Duration: 6 hours

Course Objectives:

- Create and manage grants
- Close grants
- Integrate grants with other SMART modules

Prerequisites:

- GN101: Introduction to SMART
- PC160: Introduction to Projects/Grants
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency Grants Manager
- Agency Grants Approver

PC362: Managing Grants (cont.)

Course Outline:

- Lesson 1: Understanding Grants
  - Topic 1: Key Concepts and Roles for Grants
  - Topic 2: Understanding Grants Process

- Lesson 2: Creating Grants
  - Topic 1: Creating a Grant Proposal and Proposal Budget
  - Topic 2: Copying an Existing Proposal
  - Topic 3: Submitting a Proposal
  - Topic 4: Creating an Award

- Lesson 3: Managing Grants
  - Topic 1: Understanding Award/Grant Management
  - Topic 2: Updating Awards
  - Topic 3: Reviewing Award Projects
  - Topic 4: Updating Award Project Activities
  - Topic 5: Updating Award Budgets
  - Topic 6: Reviewing Cost-Shared Amounts
  - Topic 7: Updating and Activating Award Contracts
  - Topic 8: Understanding Grant Closure
  - Topic 9: Running Federal Grant Reports

PO120: Introduction to Purchasing

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Define Basic Purchasing Terms
- Explain how purchasing terms in SMART are mapped to existing State of Kansas Terminology
- Explain the benefits to the participant, agency, and State of Kansas in using SMART Purchasing modules
- Describe how Purchasing fits into the "big picture" of SMART
- Explain the end-to-end process for Purchasing in SMART
- Define roles associated with the Purchasing process in SMART
- Explain the tasks each role is responsible for within the Purchasing process
- Explain how Purchasing integrates within SMART
- Explain how Purchasing integrates with other modules by sharing business processes within SMART

Prerequisites:
- GN101: Introduction to SMART

Required Roles:
- All Purchasing Roles

PO120: Introduction to Purchasing (cont.)

Course Outline:

- Lesson 1: Introduction to Purchasing
  - Topic 1: Key Purchasing Terms
  - Topic 2: Cross-map of Purchasing Terms
  - Topic 3: Benefits of Purchasing in SMART

- Lesson 2: Purchasing Process and Roles
  - Topic 1: Purchasing in SMART
  - Topic 2: SMART Purchasing Process
  - Topic 3: Purchasing Roles and Tasks

- Lesson 3: Purchasing Integration
  - Topic 1: Purchasing Integration in SMART
  - Topic 2: Integration with Accounts Payable
  - Topic 3: Integration with Projects and Grants
  - Topic 4: Integration with Asset Management
  - Topic 5: Integration with General Ledger
  - Topic 6: Integration with Reporting

PO320: Processing Purchase Requisitions

Delivery Method: Instructor-Led Training

Duration: 8 hours

Course Objectives:
- Define basic purchase requisition terms
- Explain how purchase requisitions fit in the end-to-end processes for Purchasing
- Create and edit purchase requisitions within SMART
- Use item selection methods and special requests
- Manage purchase requisitions

Prerequisites:
- GN101: Introduction to SMART
- PO120: Introduction to Purchasing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:
- Agency Requisitioner
- Agency Requisition Administrator
- Kansas Buyer
- Kansas Super Buyer (KDOT)
- Agency Buying Administrator
- Agency Contract Processor
- Kansas RFx Processor (KDOT)
- Agency Purchasing Approver Roles

PO320: Processing Purchase Requisitions (cont.)

Course Outline:

- Lesson 1: Understanding Purchase Requisitions
  - Topic 1: Purchase Requisition Key Concepts
  - Topic 2: Purchase Requisitions within the Purchasing Process
- Lesson 2: Performing Searches
  - Topic 1: Browsing Item Catalogs
  - Topic 2: Advanced Search Options for Items
- Lesson 3: Creating and Modifying Purchase Requisitions
  - Topic 1: Creating a Purchase Order Requisition using an Item from the Item Master List and a Procurement Card
  - Topic 2: Creating a Purchase Requisition without an Item from the Item Master List and without a Procurement Card
  - Topic 3: Creating a Purchase Requisition for a Fixed Asset Item
  - Topic 4: Creating a Purchase Requisition for a Project Item
  - Topic 5: Creating a Purchase Requisition using Prior Authorization Request
  - Topic 6: Using the Web Catalog to Create a Purchase Requisition
  - Topic 7: Edit, Save, and Submit a Purchase Requisition
- Lesson 4: Managing Purchase Requisitions
  - Topic 1: Purchase Requisitions Status
  - Topic 2: Manage Purchase Requisitions
- Lesson 5: Item Selection Methods
  - Topic 1: Favorite Items
  - Topic 2: Personal Templates
  - Topic 3: Special Request for Services

PO321: Processing Purchase Orders

Delivery Method: Instructor-Led Training

Duration: 6 hours

Course Objectives:

- Explain key purchase order terms
- Describe how purchase order processes fit into Purchasing within SMART
- Edit and process purchase orders
- Review purchase order status and historical data

Prerequisites:

- GN101: Introduction to SMART
- PO120: Introduction to Purchasing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART
- PO320: Processing Purchase Requisitions

Required Roles:

- Kansas Buyer
- Kansas Super Buyer (KDOT)
- Agency Buying Administrator
- Agency Contract Processor
- Kansas RFx Processor (KDOT)

PO321: Processing Purchase Orders (cont.)

Course Outline:

- Lesson 1: Understanding Purchase Orders
  - Topic 1: Purchase Order Key Concepts
  - Topic 2: Processing Purchase Orders within the Purchasing Process
  - Topic 3: Key Roles and Tasks Involved in Purchase Orders
  -
- Lesson 2: Process Purchase Orders
  - Topic 1: PO Auto Sourcing
  - Topic 2: Sourcing Workbench
  - Topic 3: Entering Procurement Card Information on Purchase Orders
  - Topic 4: Review ChartField Information on a Direct Connect Purchase Order
  - Topic 5: Approve Purchase Orders
  - Topic 6: Manually Budget Checking Purchase Orders
  - Topic 7: Create Purchase Order Change Order
  - Topic 8: Review Purchase Order Change Order
  - Topic 9: Create RTV against a Purchase Order
  - Topic 10: Purchase Order Reconciliation and Closing
  - Topic 11: Entering Asset Details on Purchase Orders
  - Topic 12: Entering Project Information on Purchase Orders
  - Topic 13: Inspection Required Checkbox
  - Topic 14: Creating Purchase Order Schedules

- Lesson 3: Reviewing Purchase Orders
  - Topic 1: Reviewing Purchase Orders
  - Topic 2: Purchase Order Reconciliation workbench
  - Topic 3: SRM Dashboard
  - Topic 4: Reviewing Purchase Order Change History

PO323: Managing Receiving

Delivery Method: Web-Based Training

Duration: 3 hours, 30 minutes

Course Objectives:

- Define basic receiving terms
- Explain the end-to-end process for receiving
- Describe the process of matching
- List the roles involved in the receiving process and describe the tasks performed by each role
- Create full or partial receipts, with or without a purchase order, which may or may not be associated with an asset
- Enter an asset tag and asset ID on a receipt as necessary
- Define the statuses that a receipt progresses through
- Enter receipt comments and activities
- List the steps for entering asset information
- Adjust the status of a purchase order receipt

Prerequisites:

- GN101: Introduction to SMART
- PO120: Introduction to Purchasing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency Receiver

PO323: Managing Receiving (cont.)

Course Outline:

- Lesson 1: Understanding Receiving
  - Topic 1: Key Receiving Terms and Concepts
  - Topic 2: Roles Involved in Receiving

- Lesson 2: Creating and Editing Receipts
  - Topic 1: Creating Receipts

- Lesson 3: Maintaining Receipts
  - Topic 1: Enter Asset Information
  - Topic 2: Status of a Purchase Order Receipt
  - Topic 3: Entering Receipt Comments and Activities

PO325: Entering Supplier Contracts

Delivery Method: Instructor-Led Training

Duration: 3 hours

Course Objectives:

- Define basic Supplier Contract Entry terms and concepts
- Explain how Supplier Contract Entry fits into the end-to-end process for Purchasing
- Enter transactional Supplier Contracts into SMART
- Explain the business processes associated with transactional Supplier Contracts in the State of Kansas

Prerequisites:

- GN101: Introduction to SMART
- PO120: Introduction to Purchasing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- Agency Contract Processor

PO325: Entering Supplier Contracts (cont.)

Course Outline:

- Lesson 1: Understanding Supplier Contracts
  - Topic 1: Transactional Supplier Contract Key Concepts
  - Topic 2: Supplier Contract Entry Processes
  - Topic 3: Roles Involved in Supplier Contract Entry

- Lesson 2: Entering a Supplier Contract
  - Topic 1: Defining Transactional Supplier Contract Information
  - Topic 2: Creating a Transactional Supplier Contract
  - Topic 3: Copying an Existing Supplier Contract

PO326: Using Procurement Cards

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:

- Define basic procurement card terms
- Explain basic procurement card business processes
- Explain how procurement cards fits into the end-to-end process for Purchasing
- List the roles and tasks involved in the procurement card process
- Reconcile a procurement card transaction in SMART
- Define disputes and identify the dispute process for procurement card transactions
- Explain the process of procurement card approvals in SMART

Prerequisites:

- GN101: Introduction to SMART
- PO120: Introduction to Purchasing
- GN201: Introduction to Navigating in SMART
- RP202: Introduction to Reporting in SMART

Required Roles:

- P-Card Administrator
- P-Card Reconciler
- P-Card Approver

PO326: Using Procurement Cards (cont.)

Course Outline:

- Lesson 1: Understanding Procurement Cards
  - Topic 1: Procurement Card Key Terms and Concepts
  - Topic 2: Procurement Cards within Purchasing
  - Topic 3: End-to-End Procurement Card Transaction Process
  - Topic 4: Procurement Card Roles

- Lesson 2: Procurement Card Information
  - Topic 1: Procurement Card Transactions Page
  - Topic 2: Transactions Tab Page
  - Topic 3: Status Field

- Lesson 3: An Overview of Reconciliation in SMART
  - Topic 1: Reconciliation within SMART

- Lesson 4: Navigating the Procurement Card Transactions Page
  - Topic 1: Navigation Button and Pages

- Lesson 5: Reconciling Procurement Card Transactions
  - Topic 1: Dispute Life Cycle
  - Topic 2: Billing Tab
  - Topic 3: Disputes in SMART
  - Topic 4: Reconciliation
  - Topic 5: Approvals

RP202: Introduction to Reporting in SMART

Delivery Method: Web-Based Training

Duration: 4 hours

Course Objectives:

- Navigate to and run online reports in SMART
- View a report in SMART
- Download a report in SMART
- Manage online reports in SMART
- Navigate to, search for, and run a PeopleSoft query
- View PeopleSoft query results in a new browser window
- Download PeopleSoft query results to an Excel or Comma Separated Value (CSV) file

Prerequisites:

- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART

Required Roles:

- All Reporting roles

RP202: Introduction to Reporting in SMART (cont.)

Course Outline:

- Lesson 1: Reporting Fundamentals
  - Topic 1: Reporting Tools
  - Topic 2: Reference Tools
  - Topic 3: Reporting Roles
  - Topic 4: Reporting Terms

- Lesson 2: Running Online Reports
  - Topic 1: Adding Run Control ID's
  - Topic 2: Entering Parameters
  - Topic 3: Choosing Processing Options
  - Topic 4: Running Reports
  - Topic 5: Using the Report Manager
  - Topic 6: Download Reports

- Lesson 3: Running SMART Queries
  - Topic 1: Using Query Viewer
  - Topic 2: Running Queries to HTML
  - Topic 3: Downloading Query Results

RP204: Introduction to Business Intelligence Reporting

Delivery Method: Web-Based Training

Duration: 2 hours, 30 minutes

Course Objectives:

- Explain the benefits to the end user, agency, and State of Kansas from using a data warehouse
- Describe the role of the data warehouse for SHARP and SMART
- List the end user roles involved in data warehouse reporting
- Define basic Business Intelligence terms
- Navigate with using the Business Intelligence reporting tool
- Manage existing Business Intelligence dashboards and requests

Prerequisites:

- GN101: Introduction to SMART (for SMART users)
- Introduction to SHARP CBT (for SHARP users)

Required Roles:

- HR User
- Finance User
- HR Power User
- Finance Power User

RP204: Introduction to Business Intelligence Reporting (cont.)

Course Outline:

- Lesson 1: Data warehouse Processes and Roles
    - Topic 1: Benefits of Date Warehouse
    - Topic 2: Data Warehouse Processes
    - Topic 3: Data Warehouse Roles

- Lesson 2: Navigating in Oracle BI
    - Topic 1: Accessing Oracle BI Tools
    - Topic 2: Oracle BI Components and Key Terms
    - Topic 3: Oracle BI Home Page
    - Topic 4: Working with Oracle BI Pages
    - Topic 5: Working with My Account

- Lesson 3: Managing Dashboards and Requests
    - Topic 1: View a Dashboard/Request Description
    - Topic 2: Drill Down in a Dashboard Request
    - Topic 3: Refresh a Dashboard Request
    - Topic 4: Printing a Dashboard Request
    - Topic 5: Email a Dashboard Request
    - Topic 6: Download a Dashboard Request

RP301: Ad Hoc Business Intelligence Reporting

Delivery Method: Instructor-Led Training

Duration: 8 hours

Course Objectives:

- Describe the flow of data to the data warehouse
- Describe the use of subject areas to organize data
- Create a new BI Answers request, including viewing and saving results
- Perform common BI Answers tasks, including sort, subtotal, filter, format, and add formulas to a BI request
- Create new dashboards including, modifying content, adding pages, and changing properties
- Add filters and prompts to requests and dashboards
- Add conditional and cosmetic formatting to results and dashboards
- Create different views of results including, titles, legends, text, charts, gauges, and funnels
- Combine multiple views into a dashboard layout
- Assign Permissions to dashboards and requests

Prerequisites:

- GN101: Introduction to SMART (for SMART users)
- Introduction to SHARP CBT (for SHARP users)
- RP204: Introduction to Business Intelligence Reporting

Required Roles:

- HR Power User
- Finance Power User

RP301: Ad Hoc Business Intelligence Reporting (cont.)

Course Outline:

- Lesson 1: Data Warehouse Overview
  - Topic 1: Data Warehouse Process Review
  - Topic 2: Key Terms Review
- Lesson 2: Basic BI Answers Requests
  - Topic 1: Subject Areas, Facts, and Dimensions
  - Topic 2: Refreshing the Selection Pane
  - Topic 3: Creating a BI Request
  - Topic 4: Viewing and Saving a BI Request
- Lesson 3: BI Answers Options
  - Topic 1: Common Views in BI Answers
  - Topic 2: Formatting Request Results
  - Topic 3: Adding a Subtotal
  - Topic 4: Adding a Formula
  - Topic 5: Adding a Filter
- Lesson 4: Creating a BI Dashboard
  - Topic 1: Modifying an Existing Dashboard
  - Topic 2: Adding Pages to a Dashboard
  - Topic 3: Report Properties
  - Topic 4: Guided Navigation
  - Topic 5: Dashboard Properties
- Lesson 5: Filters and Prompts
  - Topic 1: Working With Column Filters
  - Topic 2: Using Saved Requests as Filters
  - Topic 3: Using a Criteria Prompt
  - Topic 4: Using a Dashboard Prompt
- Lesson 6: Formatting Request Results
  - Topic 1: Editing Column Appearance
  - Topic 2: Editing Column Layout
  - Topic 3: Formatting Column Content
  - Topic 4: Applying Conditional Formatting
  - Topic 5: Applying Cosmetic Formatting
- Lesson 7: BI Views
  - Topic 1: Common View Tasks
  - Topic 2: Titles and Legends
  - Topic 3: Using Text
  - Topic 4: No Results View
  - Topic 5: Using Selectors
  - Topic 6: Chart Views
  - Topic 7: Gauges, Funnels, and Tickers
  - Topic 8: Compound Layout

RP302: Managing Trees

Delivery Method: Instructor-Led Training

Duration: 3 hours

Course Objectives:
- Explain the use of trees for reporting
- Create trees
- Maintain provided and custom trees

Prerequisites:
- GN101: Introduction to SMART
- GN201: Introduction to Navigating in SMART

Required Roles:
- Agency Tree Manager

Course Outline:
- Lesson 1: Understanding Trees
    - Topic 1: Understanding Trees

- Lesson 2: Creating and Maintaining Trees
    - Topic 1: Creating Trees
    - Topic 2: Adding Nodes and Values
    - Topic 3: Moving Nodes and Values in a Tree

TL370: Time and Labor Self Service

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Describe the end-to-end Time and Labor Process
- List the roles involved in Time and Labor and explain how the roles fit into the activities in the Time and Labor process
- Navigate to Time Entry
- Enter time worked and leave taken
- Submit time for approval
- Approve time reported by employees

Prerequisites:
- Logging into Self Service (http://www.da.ks.gov/ps/subject/ssc/)

Required Roles:
- Time Reporter
- Reported Time Approver

Course Outline:
- Lesson 1: Time Reporting Overview
  - Topic 1: Time and Labor Key Terms
  - Topic 2: Time and Labor Process
  - Topic 3: Time and Labor Roles

- Lesson 2: Report Time Worked
  - Topic 1: Basic Time Reporting
  - Topic 2: Time Reporting and Projects
  - Topic 3: Requesting Time Adjustments

- Lesson 3: Approve Time
  - Topic 1: Approve Time

TL371: Time and Labor for Timekeepers

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Describe the State of Kansas Time and Labor process
- List the roles involved in Time and Labor and explain how the roles fit into the activities in the Time and Labor process
- Navigate to Time Entry
- Enter time worked by employees in their workgroup(s)
- Adjust time from a prior period
- Manage exceptions
- Generate the Print Time Document Report

Prerequisites:
- Introduction to SHARP CBT

Required Roles:
- Agency Time & Labor Time Keeper

Course Outline:
- Lesson 1: Time Reporting Overview
  - Topic 1: Time and Labor Key Terms
  - Topic 2: Time and Labor Process
  - Topic 3: Time and Labor Roles
- Lesson 2: Report Time Worked
  - Topic 1: Basic Time Reporting
  - Topic 2: Time Reporting with Projects
  - Topic 3: Time Adjustments
- Lesson 3: Payable Time
  - Topic 1: Manage Exceptions
  - Topic 2: Interface Agencies Only
  - Topic 3: Time and Labor Reports
  - Topic 4: Reported Time Audit

TL372: Time and Labor for Human Resource Administrators

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Describe the State of Kansas Time and Labor process
- List the roles involved in Time and Labor and explain how the roles fit into the activities in the Time and Labor process
- Enroll Time Reporter during the hiring process
- Add and maintain default schedules
- Maintain Time Reporter information
- Manage exceptions
- Approve Payable Time
- Generate the Payable Status Report
- View the Reported Time Audit History

Prerequisites:
- Introduction to SHARP CBT
- SHARP Workforce Administration and Compensation CBT

Required Roles:
- Agency Time & Labor HR
- Agency Time & Labor Interface HR

TL372: Time and Labor for Human Resource Administrators (cont.)

Course Outline:

- Lesson 1: Time Reporting Overview
  - Topic 1: Time and Labor Key Terms
  - Topic 2: Time and Labor Process
  - Topic 3: Time and Labor Roles

- Lesson 2: Enroll and Maintain Time Reporters
  - Topic 1: Enroll Time Reporters
  - Topic 2: Maintain Time Reporters
  - Topic 3: Set a Default Schedule
  - Topic 4: Labor Distribution Overview

- Lesson 3: Payable Time
  - Topic 1: Manage Exceptions
  - Topic 2: Interface Agencies Only
  - Topic 3: Approve Payable Time
  - Topic 4: Time and Labor Reports
  - Topic 5: Reported Time Audit

TL373: Time and Labor Finance Maintenance

Delivery Method: Web-Based Training

Duration: 2 hours

Course Objectives:
- Describe the State of Kansas Time and Labor process
- List the roles involved in Time and Labor and explain how the roles fit into the activities in the Time and Labor process
- Enter and maintain task groups
- Enter and maintain task profiles
- Maintain Time Reporter information

Prerequisites:
- Introduction to SHARP CBT

Required Roles:
- Agency Time & Labor Task Reporter

Course Outline:
- Lesson 1: Time Reporting Overview
  - Topic 1: Time and Labor Key Terms
  - Topic 2: Time and Labor Process
  - Topic 3: Time and Labor Roles
- Lesson 2: Maintain Funding for Time Reporters
  - Topic 1: Labor Distribution Overview
  - Topic 2: Create Task Profile
  - Topic 3: Create Task Groups
  - Topic 4: Maintain Time Reporters
  - Topic 5: Time Adjustments – Task Only