



## SMART Human Resources Management Software

### Demonstration Tour Guide

Follow these simple steps to explore the basic functionality of the SMART 7.0 system. Once you have completed these brief exercises you will understand how to navigate the system.

- Step 1: Double click on the **SMART** icon to launch the program. When prompted, click on the **DEMO** button. **Type in your name** when prompted and click on the **CONTINUE** button.
- Step 2: You are on the **main menu**. The number of tabs at the top of the screen will grow and shrink as you move through the system. Note that the convenient **BACK** button is on the top of every screen. There is also a **HELP** button at the top of every screen.
- Step 3: Click on the **Employee List** button from the main menu page. All your employees/contractors/students will be listed here. You can click on any column heading to sort the columns. **Click on the row for Brown, Bobby B** to select that person, then click on the **Training Details Tab** from the top of the screen.
- Step 4: Information shown on this screen includes **general information**, **training requirements** and the status of those requirements, and **scheduled training events** which have not occurred yet. Each section of the screen has its own help topic. The Status of each training event is displayed. If a training event has action needed (will expire within 30 days) or is past due, a colored message will appear in the status column. Otherwise the status will be displayed as "Okay". Right-click beneath the camera icon to insert a scanned image of the training certificate for that class.
- Step 5: Scroll down to review the Scheduled Training Events items. These items are scheduled to occur, but have not occurred yet. You can use the **Reminder** hyperlink to send the employee an e-mail reminder about this upcoming event. You can click on the **Post** hyperlink to indicate that the event has occurred and move the item from the scheduled list to the completed list above.
- Step 6: Scroll to the top of the screen and click on the **Safety Details tab**. Information shown on this screen includes **General Information**, **respiratory fit test records**, **personal protective equipment records**, **medical exam history**, and **Pulmonary function test history**. You can have any number of items in each category. Once an item becomes expired, it's status reverts to Archive. The **expiration periods** for medical exams, respirator fit testing, and pulmonary function tests are set as a user preference on the preferences screen. Preferences are adjusted from a choice on the

main menu. The status is determined by the date provided and the expiration period. Choices for the checklist provided in the PPE section are also a user-defined preference.

- Step 7: Scroll to the top of the screen and click on the **Exposure Monitoring tab**. You can record as many samples for a person as you like. They will appear in the list below in reverse chronological order, with the latest (newest) samples on the top. Each line in the exposure monitoring portal represents a single sample. Samples can have simple results (i.e asbestos samples) or multiple results (i.e metals testing). For a sample with multiple results, you'll need to view the detail to see the constituent results. Click on the **Detail** hyperlink for any sample to display the details for that sample on the bottom half of the screen.
- Step 8: Scroll to the top of the screen and click on the **HR Details tab**. On this screen you can view/adjust **Checklist items, Address Information, Employment Status, Emergency Contacts, Separation Notes, Benefit Status, Cobra Compliance**, and records of specific **HR Events** like performance appraisals, notifications, warnings, promotions, or special awards/notes, actions. Click into the next available Event line. Click on the calendar pop-up and pick a date. Click into event type and select one of the event types. This list is user definable. Type in a comment and then right-click in the field beneath the camera and you can embed a photograph, scanned document, word document or PDF file to associate with this event.
- Step 9: Scroll to the top of the screen and click on the tab labeled **Home**. You can see from the main menu buttons that you can either **Find a specific employee, Display the current (or last) employee** you were working on or perform. There are several other key functions you can complete from the main menu.
- Step 10: Click on the **Scheduled Training Events** button to display all scheduled training for all employees in the system. When prompted, **click on the ALL button** to find all scheduled training. The list is displayed by training provider, then date, then site where employee works. You can make more selected choices of what events to include if you click on FIND when you choose to run this report. When done viewing the report, click on the **Continue** button on the left side of the screen.
- Step 11: Click on the **Equipment Management** button from the main menu. Here you can see a list of different types of equipment you might want to track/manage, **Click on any row** then click on the **equipment details tab** from the top of the screen. Here you can view general information about the equipment, as well as up to 10 user defined specialty fields. These field labels can be adjusted as a user preference. Scroll down to the Maintenance/Calibration section and you can see a periodic item that has occurred and which is scheduled to occur again in the future. The status is displayed in colored letters if it has action needed or is past due. Scroll to the top of the screen and click on the **Home** tab.

Step 12: Click on the **Reports** button to view a menu of available reports. Click on the **Training Status Report Grouped by Requirement**. Click on the **Continue** button from the left side of the screen. Review this report grouped by location and then requirement showing the status of all training events. You can restrict this report to a more limited scope if you like. Just follow the instructions at the bottom of the report menu. For now, once you are done reviewing the report, click on the **Continue** button on the left side of the screen. You should be returned to the report menu. If not (earlier downloads have a bug here), click on the pop-up tool right above the open book icon on the left side of the screen and select the Main Menu from the list provided.

Step 13: If you are not already on the home page, scroll to the top of the screen and click on the Home Tab. You can explore the choices on the right side of the home page on your own. Be sure to review all the program **preferences** before using the system. You can select the **set-up wizard** from the main menu to walk you through all the options. Run it as often as you like.

Notes: **Facilities** are where your employees are located. If you have just one site, you can leave the facility information empty and there is no reason to add any facilities to the system.

**Requirements** (Classes or certifications) are what are ultimately being tracked for each employee in the training module. For each requirement/class/certification you can establish an expiration period, establish if it applies to all employees assigned or just to HazMat workers. If you are not using the training tracking features, there is no need to provide any requirements.

**Training Providers** are those organizations (could be in-house) which provide one or more classes for the requirements you have created in the above section. If you enter information for training providers, you will more easily be able to register employees for classes, link to the provider's web pages to check schedules, and send them e-mail. You can have as many providers as you like. You can make more than one record for the same provider if that provider provides classes for a variety of topics. This way, the web link could be different for each listing - allowing you to link to the upcoming schedule for a specific class as opposed to the general schedule page for the entire company.

**Employee Classifications** (Roles) - Requirements can be assigned to employees one at a time, OR, if you establish **employee classifications**, you can assign GROUPS of requirements to an employee at one time. A classification is a group of one or more requirements. Each classification must have a unique name. You should initially create your requirements and providers before you create your classifications.