



State of Kansas

SMART Training Curriculum – DRAFT

Sunflower Project
Kansas Financial Management System
March 19, 2009

Key

Code	Process Area
ILT	Instructor-Led Training
WBT	Web-Based Training
AM	Asset Management
AP	Accounts Payable
AR	Accounts Receivable
GL	General Ledger
PC	Projects/Grants
PO	Purchasing
GN	General
RP	Reporting
TL	Time and Labor

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Course Code	Course Title	Delivery Method	Estimated Duration (hrs)	High Level Course Objectives
				Upon completion of the course, participants are able to:
AM140	Introduction to Asset Management	WBT	2	<ul style="list-style-type: none"> • 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 the SMART system • Describe how Asset Management integrates with other SMART system modules
AM340	Entering and Maintaining Assets	ILT	8	<ul style="list-style-type: none"> • Understand assets and leases • Enter and update assets • Manage asset insurance, maintenance, warranties, and repairs • Enter and update leases
AM341	Adjusting, Transferring, and Retiring Assets	ILT	8	<ul style="list-style-type: none"> • Understand asset adjustment, recategorization, transfer, and retirement • Adjust assets • Transfer assets • Retire and reinstate assets
AM342	Integrating Asset Management with Accounts Payable, Purchasing, and Projects, Contracts, and Grants.	ILT	4	<ul style="list-style-type: none"> • Integrate Asset Management with: <ul style="list-style-type: none"> ◦ Accounts Payable ◦ Purchasing ◦ Projects
AM343	Integrating Asset Management with Accounts Receivable, Billing, and General Ledger	ILT	4	<ul style="list-style-type: none"> • Integrate Asset Management with: <ul style="list-style-type: none"> ◦ Accounts Receivable/Billing ◦ General Ledger
AM344	Processing Depreciation	WBT	2	<ul style="list-style-type: none"> • Understand depreciation • Process depreciation <p>Note: Depreciation will be performed centrally and by a few agencies who keep their own books</p>

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				Upon completion of the course, participants are able to:
AP110	Introduction to Accounts Payable	WBT	2	<ul style="list-style-type: none"> • Define key Accounts Payable terms • Provide a clear explanation of the benefits of Accounts Payable in the SMART system • List the roles involved in Accounts Payable • Explain how Accounts Payable fits into the SMART system • Describe how Accounts Payable integrates with other modules in the SMART system
AP310	Vendor Processing	ILT	4	<ul style="list-style-type: none"> • Define basic vendor terms • Describe the vendor process in SMART, including the impacts to other modules • Enter a vendor • Search for a vendor • Modify a vendor
AP311	Voucher Processing	ILT	6	<ul style="list-style-type: none"> • 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 voucher from a receiver • Create a journal voucher • Create a reversal voucher • Manage vouchers • Monitor Control Groups
AP312	Advanced Voucher Processing	ILT	2	<ul style="list-style-type: none"> • Post a voucher • Unpost a voucher • Delete a voucher • Close a voucher • Complete a 1099 adjustment

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				Upon completion of the course, participants are able to:
AP313	Accounts Payable Maintenance	ILT	2	<ul style="list-style-type: none"> • Post a voucher • Explain how journal generator is used and the impacts to the General Ledger • Create a control group • Manage control groups • Monitor errors (posting, budget checking, matching)
AP314	Travel and Expenses	WBT	2	<ul style="list-style-type: none"> • Define basic travel and expense terms and concepts • Understand the various roles involved in the Travel and Expense process • Enter a Travel Authorization • Enter a Cash Advance • Enter an Expense Report • Print Travel Documents
AP315	Advanced Travel and Expense Processing	ILT	4	<ul style="list-style-type: none"> • Define basic travel and expense terms and concepts • Understand the various roles involved in the Travel and Expense process • Enter and Manage Travel Authorization (advanced scenarios) • Enter and Manage Cash Advances (advanced scenarios) • Enter and Manage Expense Report (advanced scenarios) • Print Travel Documents
AP316	Travel and Expense Administration	ILT	2	<ul style="list-style-type: none"> • Explain the role that a Travel Administrator has in the Travel and Expense process for the SMART system • Enter a traveler • Set up traveler permissions • Maintain an employee profile

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				Upon completion of the course, participants are able to:
AR150	Introduction to Accounts Receivable and Billing	WBT	2	<ul style="list-style-type: none"> • Define key Accounts Receivable and Billing terms • Identify benefits of Accounts Receivable and Billing in the SMART system • Explain how Accounts Receivable and Billing fits into the SMART system • Explain the State of Kansas Accounts Receivable and Billing process • List the roles involved in Accounts Receivable and Billing • Describe how Accounts Receivable and Billing integrates with other modules in the SMART system
AR350	Maintaining Customers	ILT	3	<ul style="list-style-type: none"> • List and define all primary and additional customer roles • Describe the changes from the existing State processes to the SMART processes • 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 • Ability to enter, copy, and add general information to a new customer • Ability to update customer information
AR351	Creating and Maintaining Receivables	ILT	4	<ul style="list-style-type: none"> • Define key receivables terms • Explain the end-to-end receivables process • List and define the roles involved in the receivables process • Enter and maintain receivables • Review customer accounts • Create customer correspondence
AR352	Creating and Maintaining Deposits	ILT	4	<ul style="list-style-type: none"> • Define key deposit terms • Explain the end-to-end deposit process • List and define the roles involved in the deposit process • Enter, apply, and review specific deposits

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Course Code	Course Title	Delivery Method	Estimated Duration (hrs)	High Level Course Objectives
				Upon completion of the course, participants are able to:
AR353	Creating and Processing Billing	ILT	4	<ul style="list-style-type: none"> • List and define key billing terms • Explain the end-to-end billing process • List and define the roles involved in the billing process • Enter bills online • Create recurring bills • Research bills • Generate invoices • Adjust bills
AR354	Advanced Billing Processes	ILT	2	<ul style="list-style-type: none"> • Define advanced billing terms • Explain the end-to-end advanced billing process • List and define the roles involved in the advanced billing process • Create consolidated bills • Copy a group of bills • Manage installment bills
GL130	Introduction to General Ledger	WBT	5	<ul style="list-style-type: none"> • Define key General Ledger and Commitment Control terms • Describe how the General Ledger and Commitment Control processes fit into the overall SMART process • List the roles involved in General Ledger and Commitment Control modules • Explain how General Ledger and Commitment Control integrate with other modules in the SMART system • Explain how General Ledger integrates with the SHARP Payroll process • Explain the interface from the Kansas Internet Budget and Reporting System (IBARS) to the SMART system • Describe the State of Kansas Chart of Accounts • Explain how modified accrual differs from cash accrual • Describe the Period and Year-End closing processes in SMART

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				Upon completion of the course, participants are able to:
GL330	Processing Journal Entries	ILT	8	<ul style="list-style-type: none"> • Describe the end-to-end journal entry process • List the roles involved in the journal entry process • Define key journal entry terms and concepts • Demonstrate the steps to successfully import a spreadsheet journal • Create a new journal online • Perform a Journal Inquiry
GL331	Processing Budget Journals	ILT	4	<ul style="list-style-type: none"> • Describe the end-to-end budget journal entry process • List the roles involved in the budget journal entry process • Define key budget journal entry terms and concepts • Demonstrate the steps to successfully import a spreadsheet budget journal • Create a new budget journal online • Enter a budget transfer • Enter a budget adjustment • Perform a Budget Overview Inquiry
GL332	Advanced General Ledger Topics	WBT	2	<ul style="list-style-type: none"> • Describe the allocation request process • Define Pool, Basis, Target and Offset for allocations • Describe allocation steps and allocation groups • Describe the approach for calculating Average Daily Balance • Describe the Average Daily Balance source and target ledger • Describe the timing of the Average Daily Balance process • Describe the significance of a reporting tree • Create and modify reporting trees using Tree Manager

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				Upon completion of the course, participants are able to:
GN101	Introduction to the SMART System	WBT	2	<ul style="list-style-type: none"> • Define key SMART terms and explain why the SMART system is being implemented in the State of Kansas • List benefits of the SMART system • Explain implementation timeline for the SMART system • List modules and functionality of the SMART system and major functions of each module • Describe the end-to-end process of the SMART system • Define key terms and processes in relationship to the budget structure of the SMART system • Describe the training program for the SMART system and training materials available for end-users • Describe the help tools available for end-users of the SMART system
GN201	Introduction to Navigating in SMART	WBT	4	<ul style="list-style-type: none"> • Log in and out of the SMART system • Describe how security roles will have an effect on the users task and viewing abilities • Navigate to online help tools • Set Favorite pages • Navigate to pages • Perform Searches • Navigate within pages • Describe the differences between required field and optional field • Personalize the SMART Home Page • Set a new password in SMART
GN203	Performing Approvals	WBT	2	<ul style="list-style-type: none"> • Explain how workflow is used in the SMART system • List the roles involved in the workflow process and the activities performed by each role • Access workflow • Explain the worklist options and the process steps required after each option has been used • Approve a work list item

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				Upon completion of the course, participants are able to:
PC160	Introduction to Projects/Grants	WBT	2	<ul style="list-style-type: none"> • Define key Projects/Grants terminology • Identify and describe the roles involved in Projects/Grants • Explain the purpose and benefits of Projects/Grants • Explain how Projects/Grants fits into the SMART system • Describe how Projects/Grants integrate with other SMART system modules
PC360	Managing Projects	ILT	8	<ul style="list-style-type: none"> • Understand projects • Enter and maintain projects • Use project trees • Analyze projects • Integrate Projects with SMART system modules
PC361	Managing Customer Contracts	ILT	4	<ul style="list-style-type: none"> • Understand contracts • Create and manage contracts • Work with billing and revenue recognition programs • Manage revenue and contracts billing • Process prepaid amounts • Integrate Contracts with other SMART system modules
PC362	Managing Grants	ILT	4	<ul style="list-style-type: none"> • Understand grants • Create and manage grants • Close grants • Integrate Grants with other SMART system modules
PO120	Introduction to Purchasing	WBT	2	<ul style="list-style-type: none"> • Define key purchasing terms and roles within Purchasing • Explain how Purchasing fits into the SMART system functionality
PO320	Processing Purchase Requisitions	ILT	6	<ul style="list-style-type: none"> • Create and edit purchase requisitions within the SMART system • Manage purchase requisitions
PO321	Processing Purchase Orders	ILT	6	<ul style="list-style-type: none"> • Create and enter purchase orders • Review and process purchase orders
PO322	Advanced Purchase Orders	ILT	2	<ul style="list-style-type: none"> • Submit purchase orders for approval • Monitor approvals for purchase orders

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				Upon completion of the course, participants are able to:
PO323	Managing Receiving	WBT	2	<ul style="list-style-type: none"> • Create and manage receipts, with or without a purchase order • Create a return to vendor transaction (RTV)
PO324	Managing the Bid Process	ILT	4	<ul style="list-style-type: none"> • Manage bid factors, bid events, the bid process and negotiations • Describe and review sourcing data and reports
PO325	Managing Supplier Contracts	ILT	4	<ul style="list-style-type: none"> • Explain supplier contracts • Manage the contract library, document life cycles and contract amendments
PO326	Using Procurement Cards	WBT	2	<ul style="list-style-type: none"> • Reconcile procurement card transactions • Execute the procurement card dispute process
RP202	Introduction to Reporting in SMART	WBT	5	<ul style="list-style-type: none"> • Navigate to and run online reports in the SMART system • View a report in the SMART system • Download a report in the SMART system • Manage online reports in the SMART system • Navigate to, search for and run a PeopleSoft query • View PeopleSoft query results in a browser window • Download PeopleSoft query results to an Excel or Comma Separated Value (CSV) file
RP204	Introduction to Business Intelligence Reporting	WBT	3	<ul style="list-style-type: none"> • Describe the role of the data warehouse for SHARP and SMART reporting • Describe the processes and roles for the data warehouse • Define key Business Intelligence (BI) terms • Navigate in Oracle BI • Set a Default Dashboard • View, Download, Print, and Email Dashboards and BI Answers requests

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				Upon completion of the course, participants are able to:
RP301	Ad Hoc Business Intelligence Reporting	ILT	8	<ul style="list-style-type: none"> • Create a new BI Answers request • Sort, subtotal, filter, format, create prompts, and add formulas to a BI Answers request • Create views of results including, charts, pivot tables, plain and formatted text • Modify an existing dashboard, including add a page, change content, and change properties • Create a basic template in Word to pull data from a BI Answers request into a BI Publisher report layout
TL370	Time Entry Self Service for Employees	WBT	1	<ul style="list-style-type: none"> • Enter time using employee self service
TL371	Time Entry Self Service for Managers	WBT	1	<ul style="list-style-type: none"> • Enter and approve time using manager self service
TL372	Enter and Adjust Time	ILT	4	<ul style="list-style-type: none"> • Manage schedules • Enter and adjust time • Manage exceptions

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