Administration
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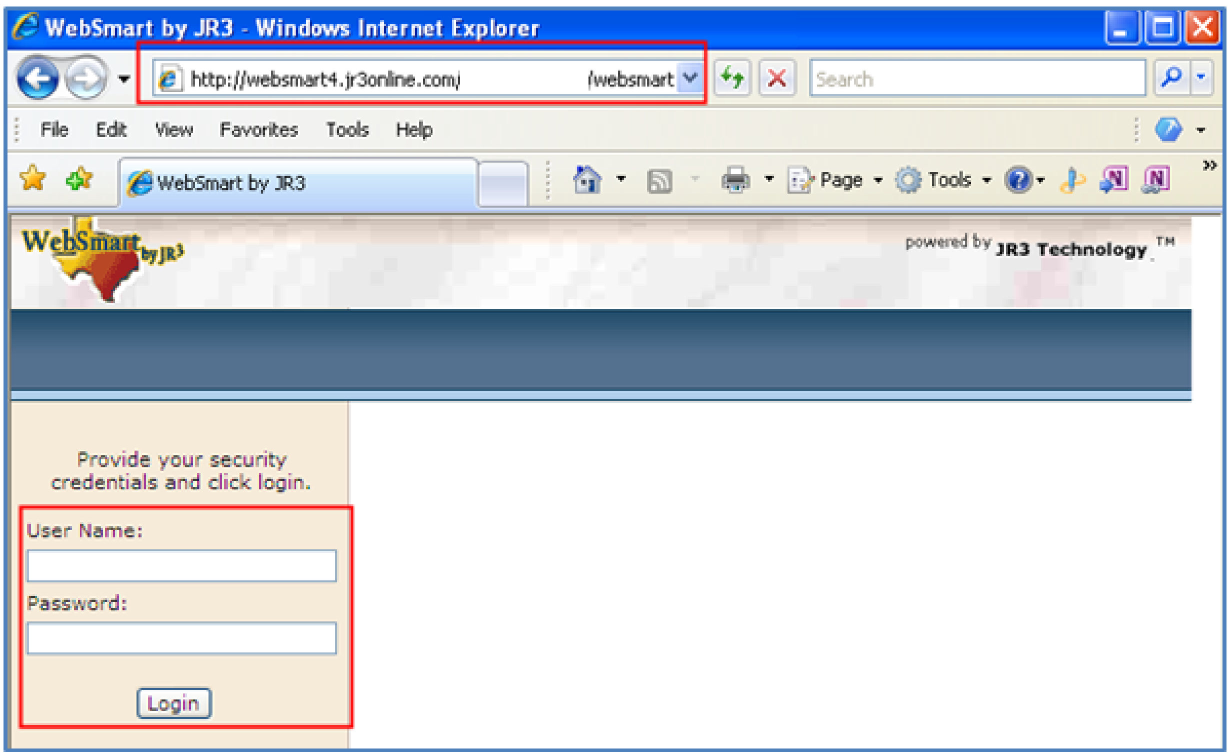
Logging into WebSmart

Here's a few tips when logging into WebSmart:

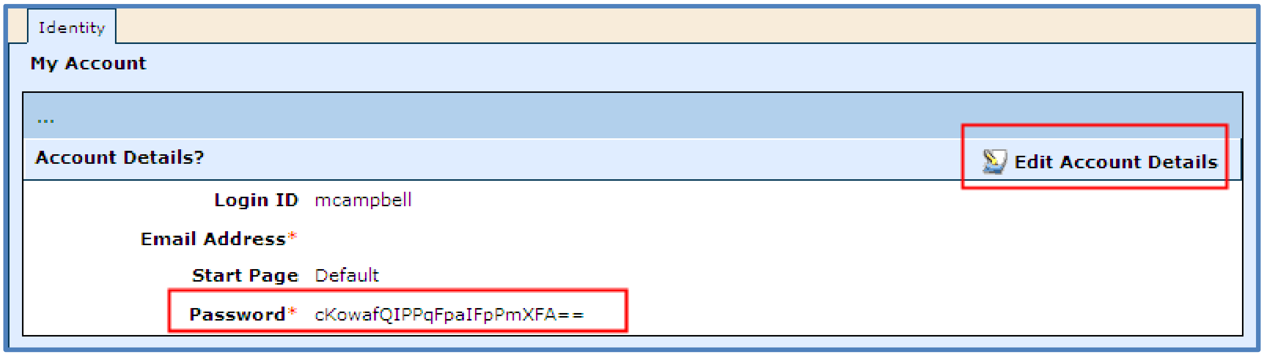
- Enter the URL below into your browser. We recommend IE7; however, we realize many districts are upgrading to IE8 so we are current working on that compatibility.
- Enter your User Name
- Enter your Password
- Select the Login toggle button



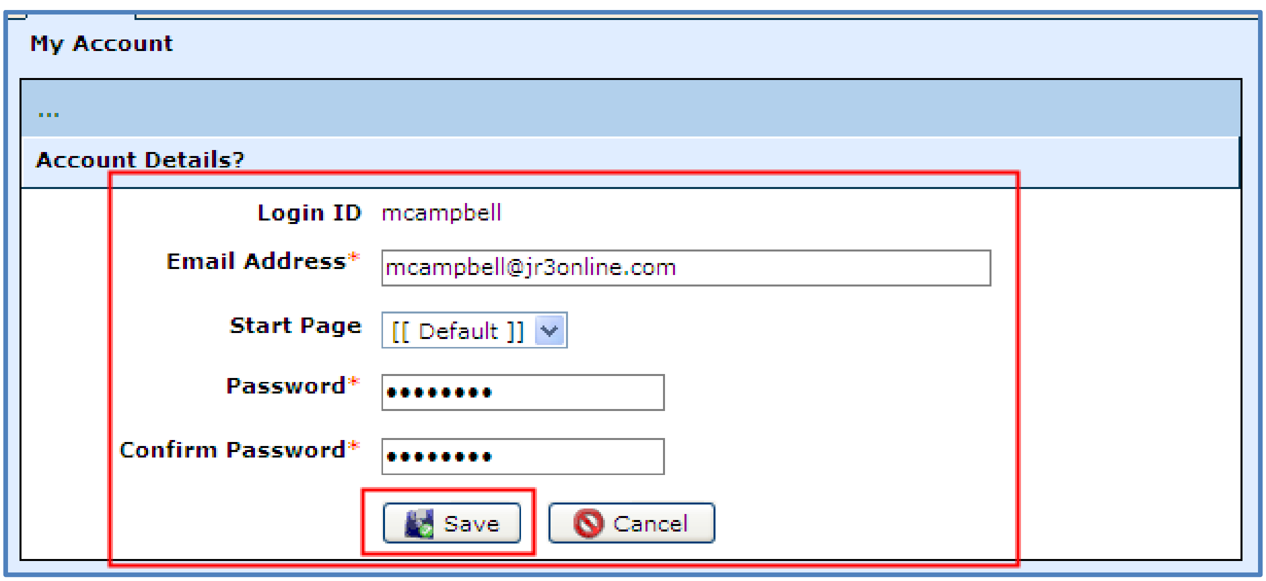
Once you are logged in, you have the ability to change your password.

- Select MyAccount in the upper right hand corner

- Select **Edit Account Details**. Please note that the password is jumbled for security reasons so it will always look like something similar to the one below.



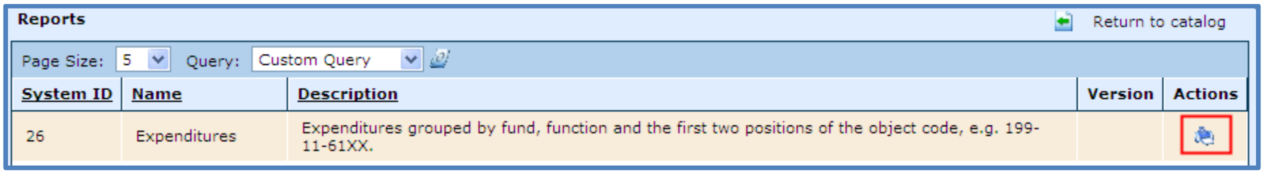
- Enter your **email address** – this will be a field used in the near future, which will include the use of this email address to prompt an email sent to you in case you lock your account because of a forgotten password.
- **Start Page** – currently this will populate to Default; however, in the future you will be able to Select a Start Page as your login page – sort of like selecting a home page for your internet browser, you will be able to select a landing page for WebSmart.
- Enter a new **Password**
- Then Confirm **Password**
- Select **Save**



WebSmart by JR3 Reviewing Expenditure Reports

Let’s review the Expenditure Reports so you can evaluate your budget.

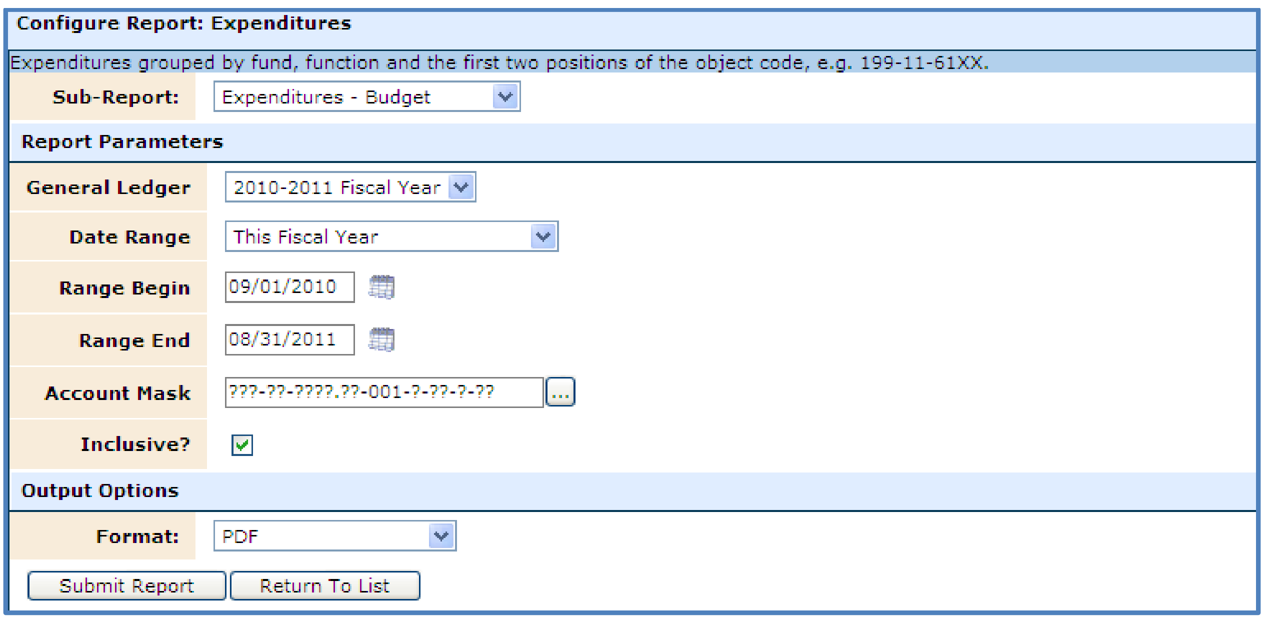
- Go to **Finance > Reports > Legacy Reports**
- Select the printer icon to enter the **Expenditures** report


Reports Return to catalog

Page Size: 5 Query: Custom Query

System ID	Name	Description	Version	Actions
26	Expenditures	Expenditures grouped by fund, function and the first two positions of the object code, e.g. 199-11-61XX.		

- Select the parameters pertaining to the budget you are reviewing.
  - **General Ledger**
  - **Date Range**
  - **Account Mask** – this will default to your security access of your campus
  - Select **Submit Report**


Configure Report: Expenditures

Expenditures grouped by fund, function and the first two positions of the object code, e.g. 199-11-61XX.

Sub-Report:	Expenditures - Budget
Report Parameters	
General Ledger	2010-2011 Fiscal Year
Date Range	This Fiscal Year
Range Begin	09/01/2010
Range End	08/31/2011
Account Mask	???-??-????.??-001-?-??-?-??
Inclusive?	☑
Output Options	
Format:	PDF

Submit Report Return To List

- The report will look like the following.

  1. Appropriation – this is the amount of your budget
  2. Encumbrance – this amount is the total of all reserved encumbrances in purchase orders
  3. 9/1/2010 – 8/31/11 – this includes the total amount of expenditures for the date range you specified in the parameters.
  4. Year – to – Date – this includes the total amount spent for the school year (to date)
  5. Unencumbered – this is the remaining balance left in your budget after subtracting encumbrances and expenditures from the budget
  6. % Used – this percentages indicates the amount of the budget spent

Expenditures - Budget
09/01/2010 thru 08/31/2011
Accounts Matching 420-__-63__.__-001-_-__-_-__

3 Total Page(s)
8/18/2011
10:38:33 PM

Account	Description	Appropriation	Encumberance	9/1/2010 8/31/2011	Year-to-Date	Unencumbered	% Used
Fund: 420 FSP Formula		1	2	3	4	5	6
*** Function: 11 Reg Ed							
420-11-6321.00-001-1-22-0-00	FSP Formula - Textbooks	$500.00	$0.00	$0.00	$0.00	$500.00	0.00%
420-11-6321.00-001-1-99-0-00	FSP Formula - Textbooks	$0.00	$0.00	$0.00	$0.00	$0.00	***
420-11-6339.00-001-1-99-0-00	FSP Formula - Testing Materials	$0.00	$207.00	$0.00	$0.00	($207.00)	***
420-11-6399.00-001-1-11-0-00	FSP Formula - General Supplies	$0.00	$1,854.65	$0.00	$0.00	($1,854.65)	***
420-11-6399.00-001-1-22-0-00	FSP Formula - General Supplies	$16,252.00	$14.99	$15,298.91	$15,298.91	$938.10	94.23%
420-11-6399.00-001-1-23-0-00	FSP Formula - General Supplies	$1,000.00	$243.09	$113.00	$113.00	$643.91	35.61%
420-11-6399.00-001-1-24-0-00	FSP Formula - General Supplies	$0.00	$0.00	$0.00	$0.00	$0.00	***
420-11-6399.00-001-1-30-0-00	FSP Formula - General Supplies	$0.00	$0.00	$0.00	$0.00	$0.00	***
420-11-6399.00-001-1-99-0-00	FSP Formula - General Supplies	$0.00	$0.00	$0.00	$0.00	$0.00	***
*** Total Function: 11 Reg Ed		$17,752.00	$2,319.73	$15,411.91	$15,411.91	$20.36	99.89%

Creating a Security Pattern

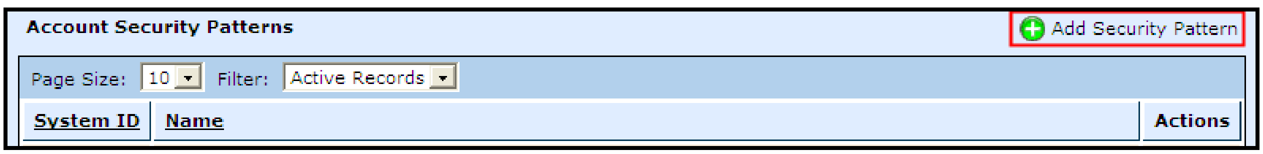
WebSmart gives administrators the ability to grant access to account codes for requisition purposes. Users in the system can have a full range of account codes or as few as one account code based on Account Code Security in the system.

By default only persons with Administrative privileges have access to account codes. To grant others account codes follow these steps.

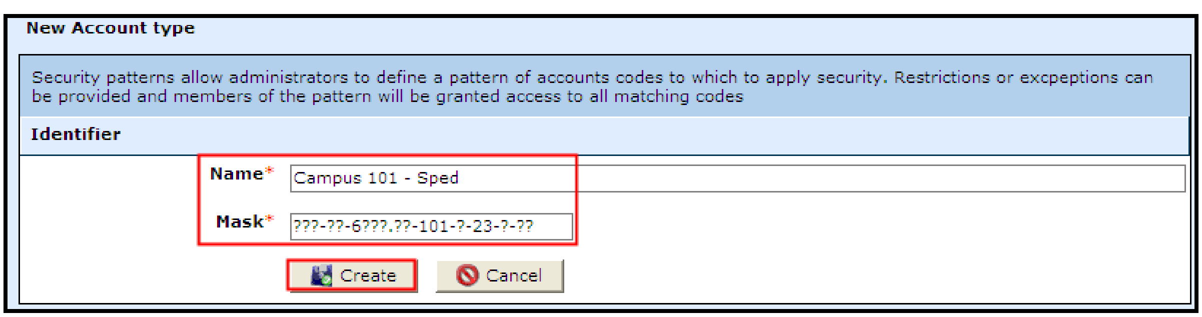
A security pattern of ???-??-????.??-???-?-??-?-?? grants the administration group access to ALL account codes.

To Create a Security Pattern:

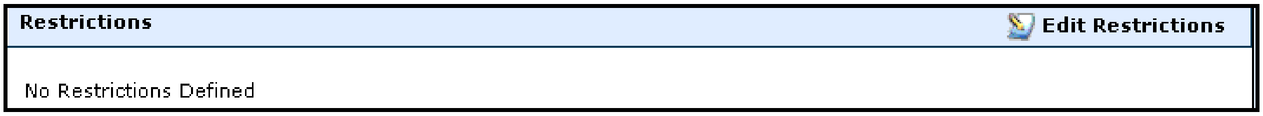
- Go to **Finance** > **General Ledger** > **Chart of Accounts** > **Security Patterns**
- To create a new pattern click on **Add Security Pattern**



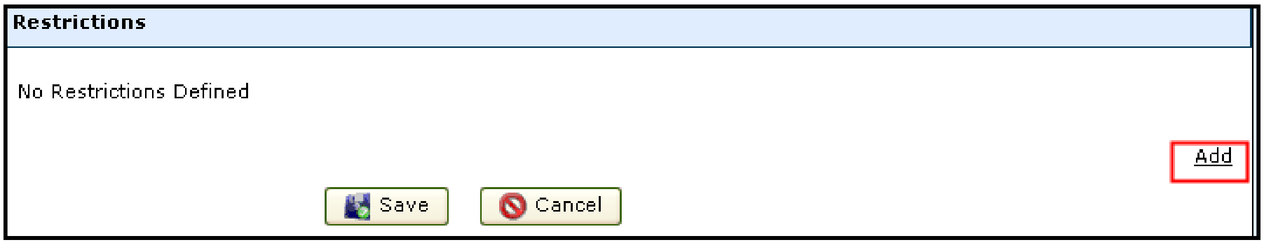
- Enter the **Name.** This should provide the Security Administrator enough information to know to whom the Pattern should be added.
  - Example: Campus 001 – General
  - Example: Campus 101 – SpEd
  - Example: 41-Admin-02
- Enter the **Mask** by first entering all ?s and then editing the portion of the mask you desire to set.
  - Most of the time, you will want to mask a more generic range of codes rather than one at a time. You can choose a broader mask by replacing individual digits of the account code. For example, if you create the code ???-??-63??.??-???-?-??-?-?? you will give access to codes that include 6339, 6398 and 6399 rather than having to choose each of these individually.
- Once you have this defined, click Create



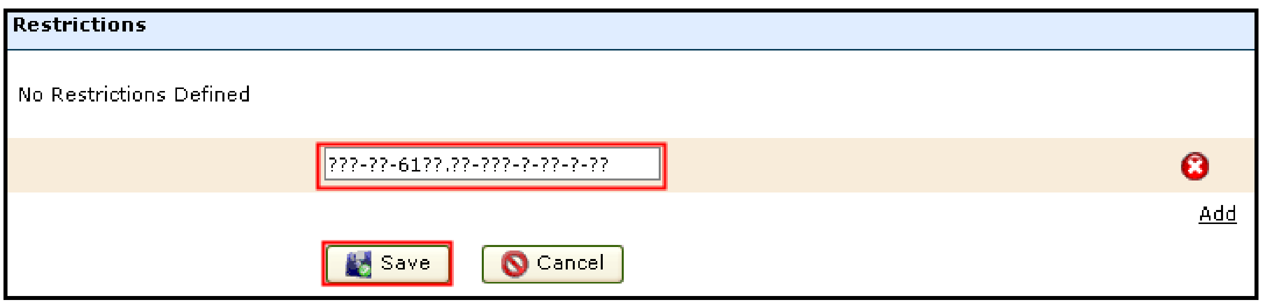
- You can now limit this Security Pattern by clicking **Edit Restrictions**



- You will use the “Add” button on the right of the screen to generate a text field. You will repeat entering the ?s and then editing the mask according to the code information that should not be accessible to this Security Pattern.

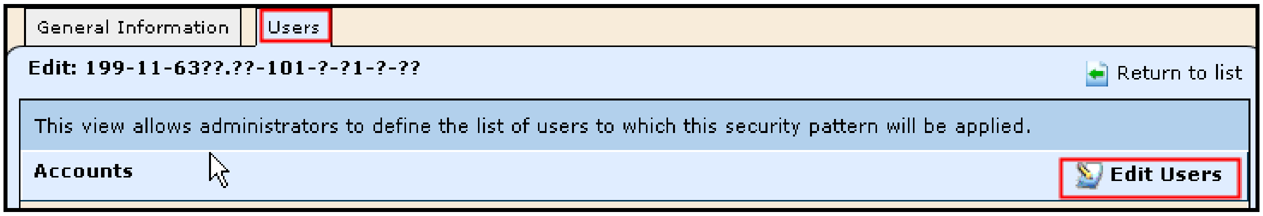


- Enter all ?’s in the field to retrieve the format of the account code
- Enter the desired restrictions. For example, if you wish to exclude payroll account codes from the security pattern so that the user will not be able to see any payroll related account codes, you would enter ???-??-61??.??-???-?-??-?-?? in the field.
- Click Save to retain the Restriction

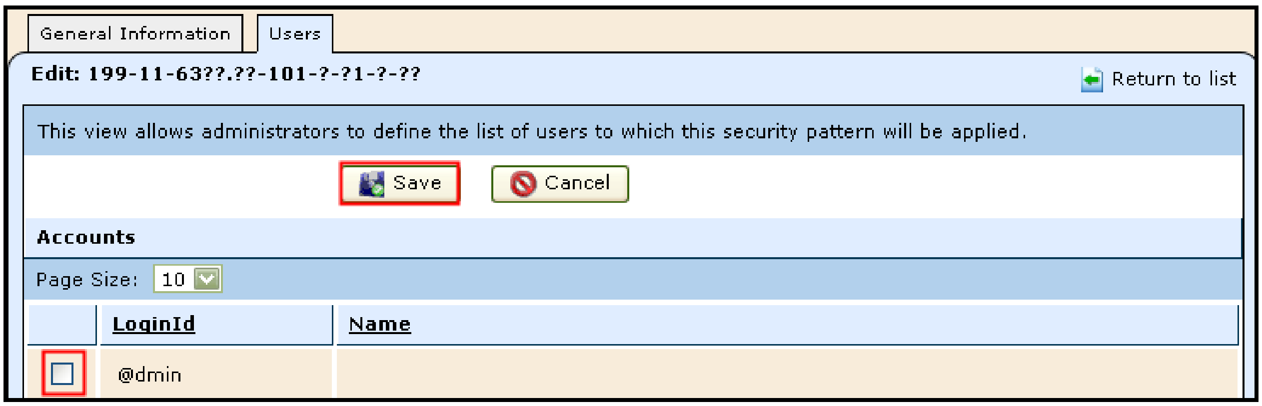


- Repeat for each part of the Mask you want limited. Setting more than one limitation on a Restriction narrows its definition.
    - Example: ???-??-????.??-???-?-23-?-?? would restrict the user from all codes with Sub-Object 1 of 23 but 420-??-????.??-???-?-23-?-?? would only restrict the user from codes with Sub-Object 1 of 23 *and* out of fund 420

- You can add this Security Pattern to users by clicking on the Users tab while in a Security Pattern
- Click **Edit Users**



- Use the check boxes to grant this Security Pattern to the necessary Users.
- Click Save to complete this step



(Note: Security Patterns can also be added to Users through Security screens in Admin)

- Use Return to list when you have completed all work in a Security Pattern

Examples:

4??-??-????.??-???-?-??-?-?? – grants rights to access any fund codes with the fund starting with a 4

???-??-????.??-???-?-23-?-?? – grants rights to access any fund codes with the program intent of 23 (SPED)

240-??-????.??-???-?-??-?-?? – grants rights to access all account codes in fund 240 (Lunch Room/Food Services)

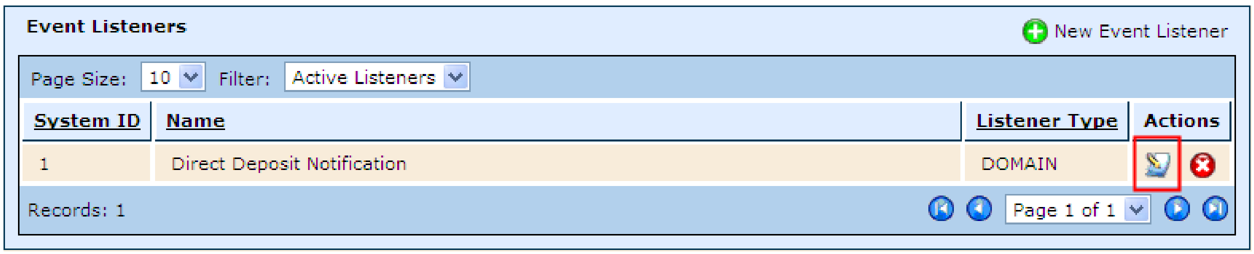
???-??-6399.??-001-?-??-?-?? – grants rights to access all account codes in object code 6399 and organization 001 (High School General Supplies)

Creating a System Message on Direct Deposit Stubs Email

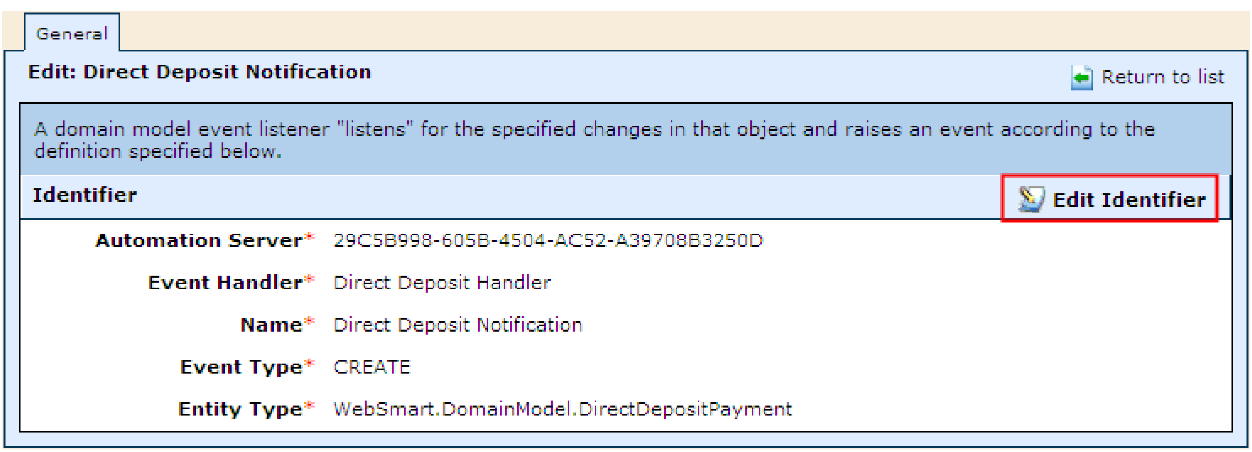
WebSmart offers the ability to send a customized email message with the emailed direct deposit stubs to employees when the payroll checks are processed. To create the customized message, follow these steps:

To Create a System Message on Direct Deposit Stubs Email

- Go to Admin > Admin > Automation > Event Listeners
- Select to the right of Direct Deposit Notification (see below)



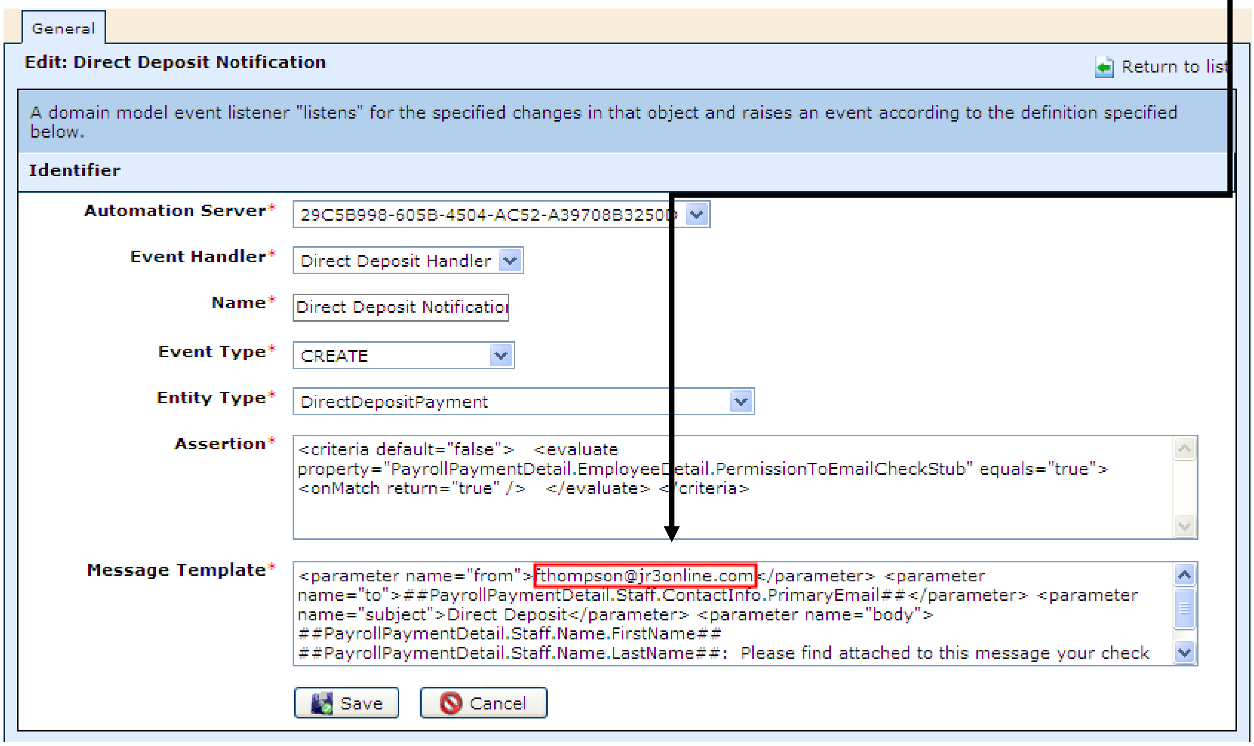
- Select Edit Identifier to open the contents of the Direct Deposit Notification (see below)



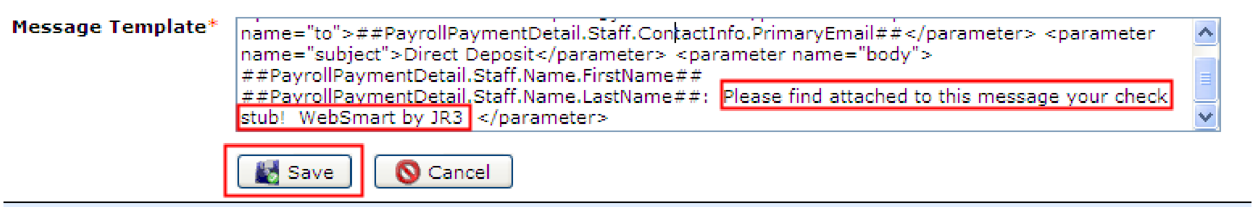
- The standard email address entered into the Message Template indicates the emails will appear to be from fthompson@jr3online.com. To change the email address to appear to be from a district staff, locate the following line within the Message Template. (It's the first line):

  <parameter name="from">**fthompson@jr3online.com**</parameter> <parameter

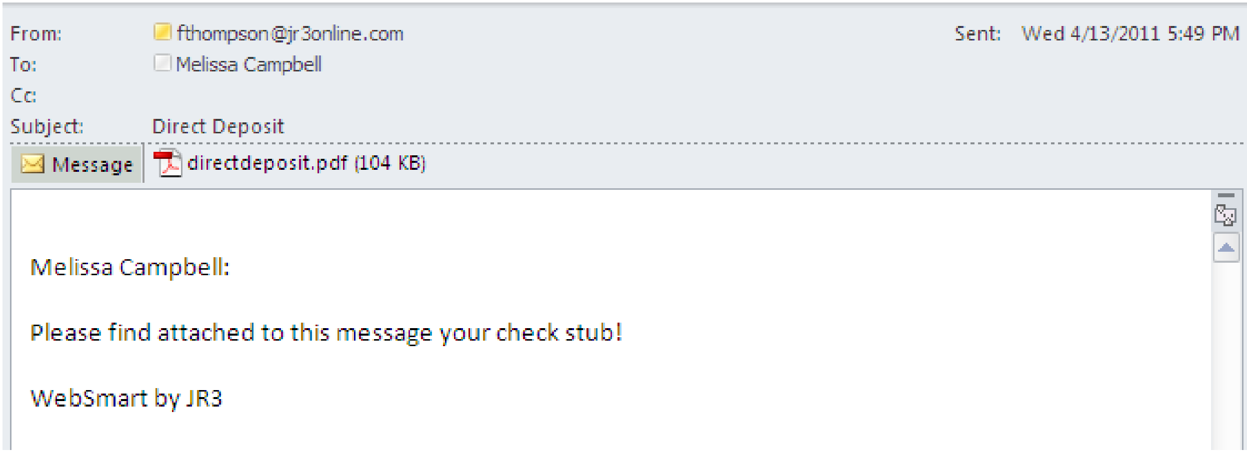
- Highlight the email address and enter another email address. Make sure there are not any spaces between the > and <.



- Next, look in the Message Template and find the message that appears AFTER ##PayrollPaymentDetail.Staff.Name.LastName##:
  - The standard message may appear something similar to the message below: Please find attached to this message your check stub! WebSmart by JR3.
  - Highlight the standard message and begin typing your custom message exactly how you want it to appear in the email when district staff receive their emailed direct deposit stubs.
  - Select Save.



- The email message to the employees will appear similar to the one below.


From: fthompson@jr3online.com Sent: Wed 4/13/2011 5:49 PM
To: Melissa Campbell
Cc:
Subject: Direct Deposit
Message directdeposit.pdf (104 KB)

Melissa Campbell:

Please find attached to this message your check stub!

WebSmart by JR3

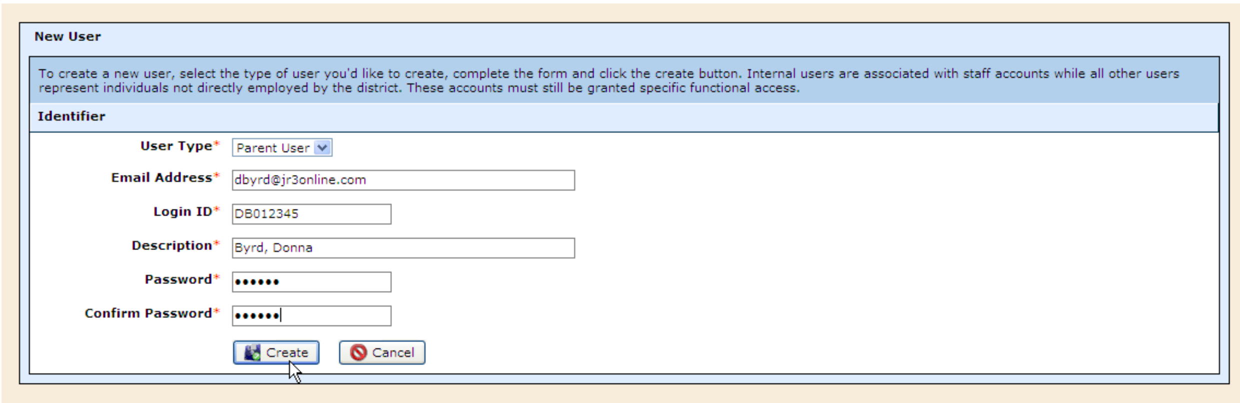
Assign Portal Rights

Follow these instructions to assign portal rights to parents and guardians.

Admin > Security > Portal Rights

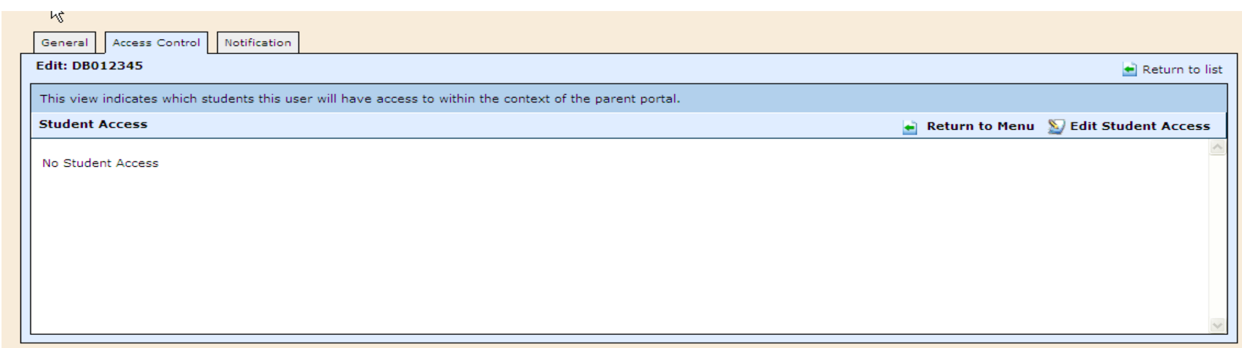
- Click Add User

Identifier



- User Type (defaults to Parent User)
- Email Address – enter the email address for the user
- Login ID – enter a unique login ID for the user (recommend using User's Initials followed by the student local ID number)
- Description – enter the user's name (last, first)
- Password – enter a password for the user (user will have option to change)
- Confirm Password – re-enter the password for the user
- Click Create

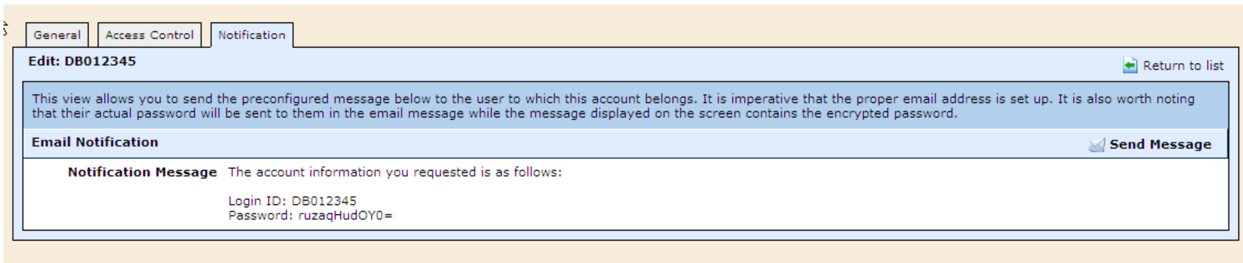
Student Access



- Click Access Control

- Click Student Access
- Click Edit Student Access
- Select Students
- Click Save

Email Notification



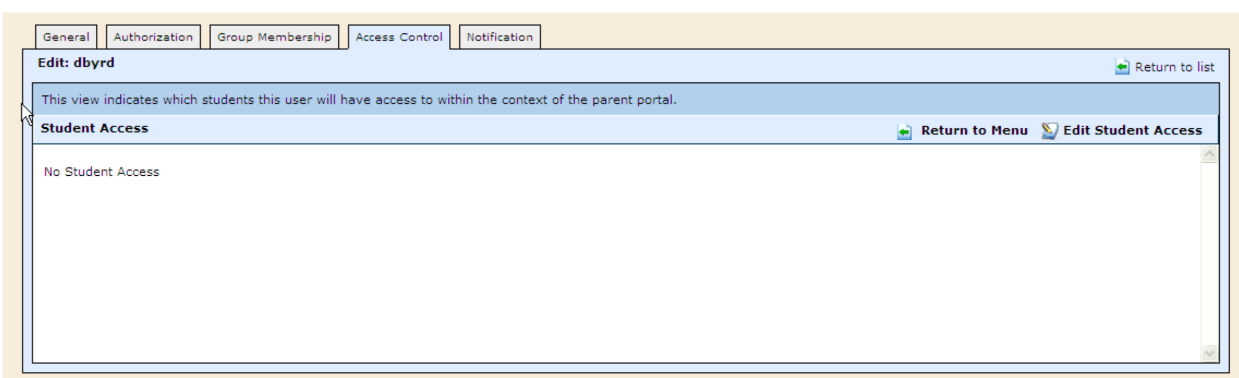
- Click Notification
- Click Send Message
- Result Message Sent (Error – verify email address; Hotmail email accounts are not compatible)

Follow these instructions to add portal rights to district employees. (Examples: teachers who have students enrolled, principals, counselors, special programs teachers, etc.)

Admin > Security > Users

- Locate User Click

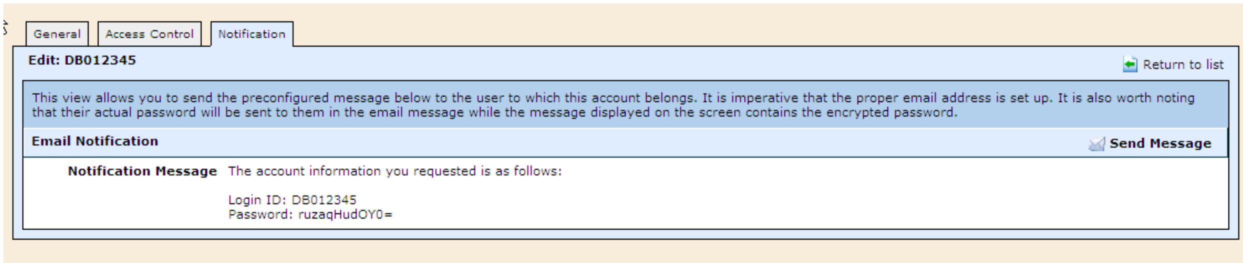
Student Access



- Click Access Control
- Click Student Access
- Click Edit Student Access

- Select Students
- Click Save

Email Notification

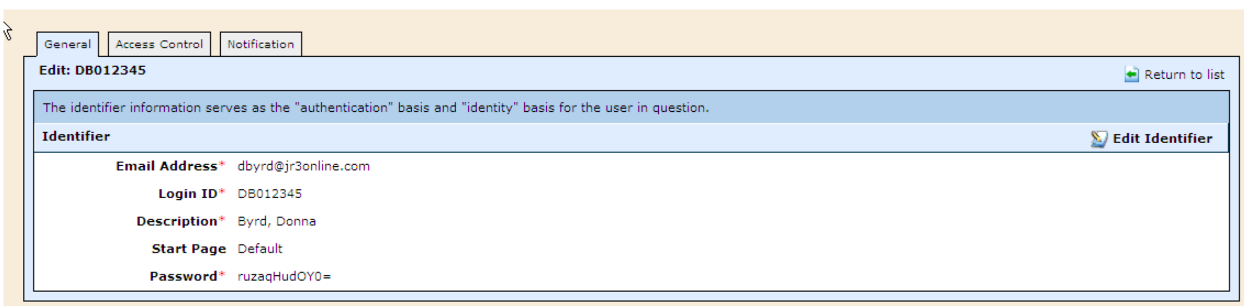


- Click Notification
- Click Send Message
- Result Message Sent (Error – verify email address; Hotmail email accounts are not compatible)

Follow these instructions to change user password.

Admin > Security > Portal Rights

- Locate User Click

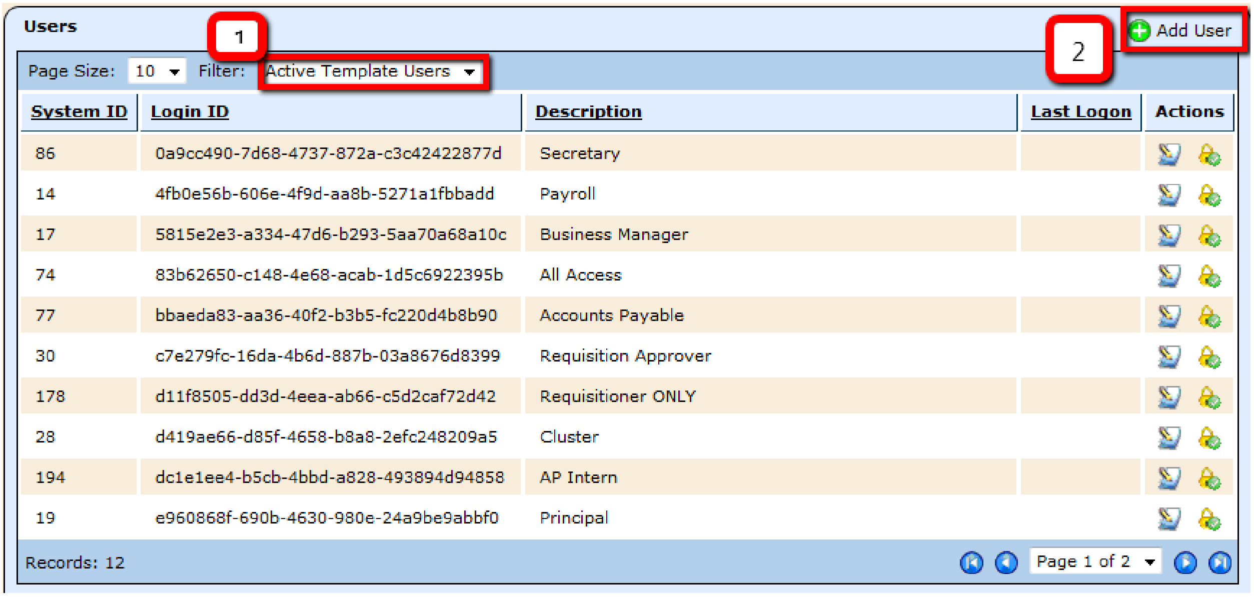


The password that you see is encrypted and should not be given to a user.

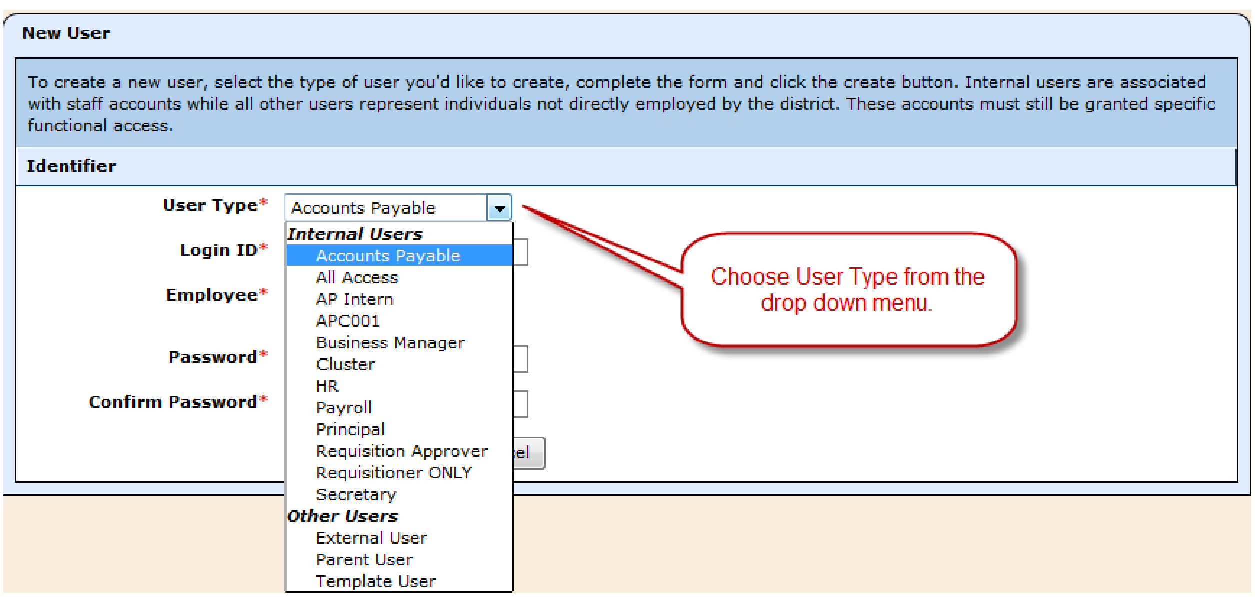
- Click Edit Identifier
- Enter Password
- Confirm Password
- Click Save

Setting up Users using Templates

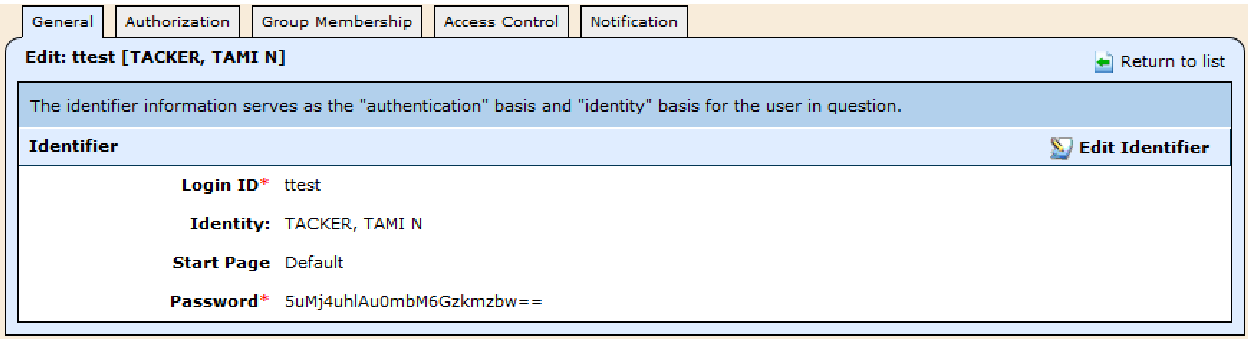
1. **Log into WebSmart**
2. **Go to the Admin module**
3. **Choose Security>Add User**
4. **Choose Filter: Active Template Users**



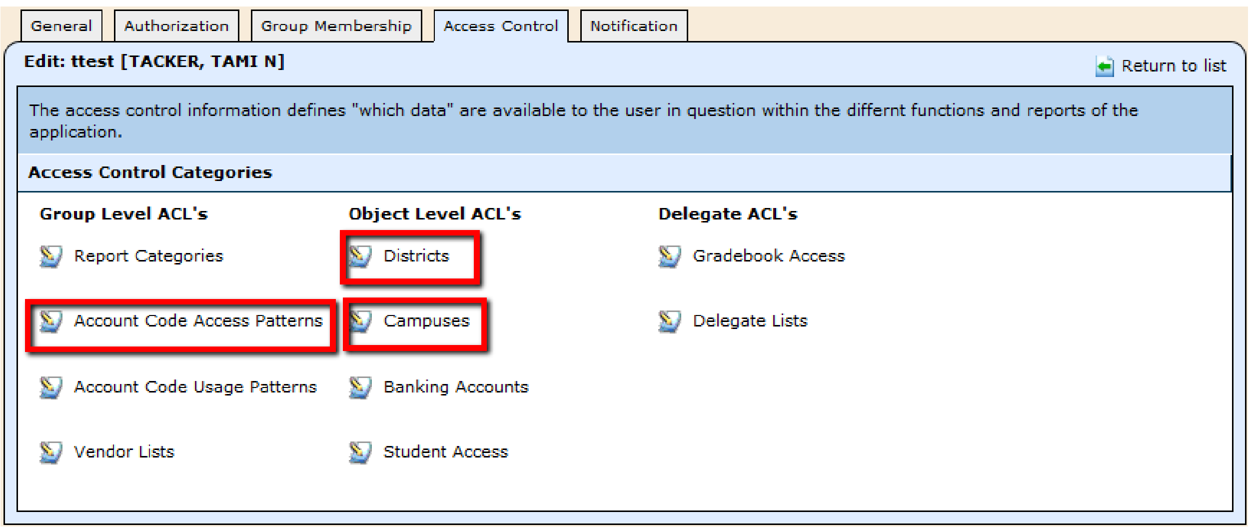
5. **Choose Add User (we will use principal as an example) If the Template does not fit the user you are adding then you can create a new Template or setup the user without a template. If you set them up without the Template you will have to be sure and give the user the access you want him to have under Access Control: Account Code Usage, Account Code Access you want them to have. You will need to give them all the things that you want them to be able to do.**



6. Enter the Login ID (usually first initial, last name)
7. Choose the employee by typing the last name and choosing the correct employee. Employee must be set up in HR before making user in the WebSmart system.
8. Choose a password (usually password) user can change later.
9. Confirm by typing the same password again.
10. Enter Create User and you will see the following screen.



11. Click on Access Control Tab and fill out the access controls enclosed in the red boxes base on what District and Campus and Access Patterns for that particular user. The access controls not in the red boxes are brought in through the Template User and don't need any attention.

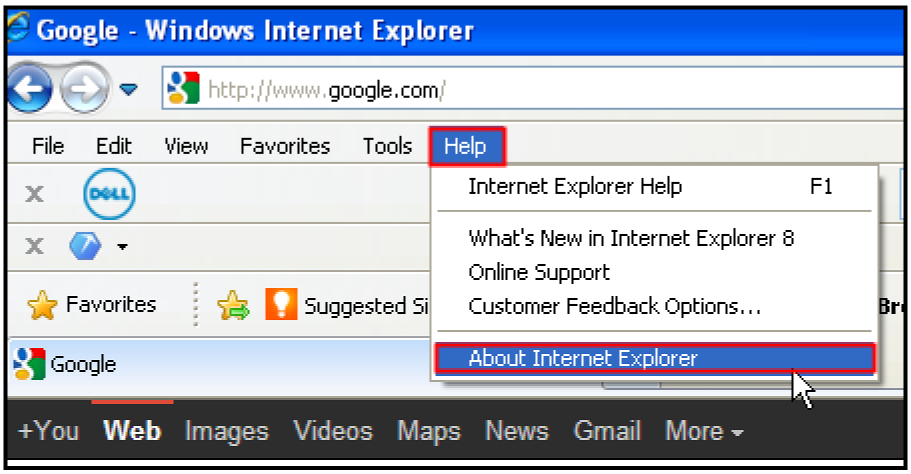


This should be all you need to do if you use the Template user to set up your users.

Browser Settings: Internet Explorer

When working in WebSmart by JR3, we recommend using Internet Explorer versions 6 to 8. To find out which version of Internet Explorer you are using, open up any web page using the Internet Explorer browser.

- On the Toolbar, go to the Help section and scroll over to About Internet Explorer, which will open a window indicating which version of Internet Explorer you are using.

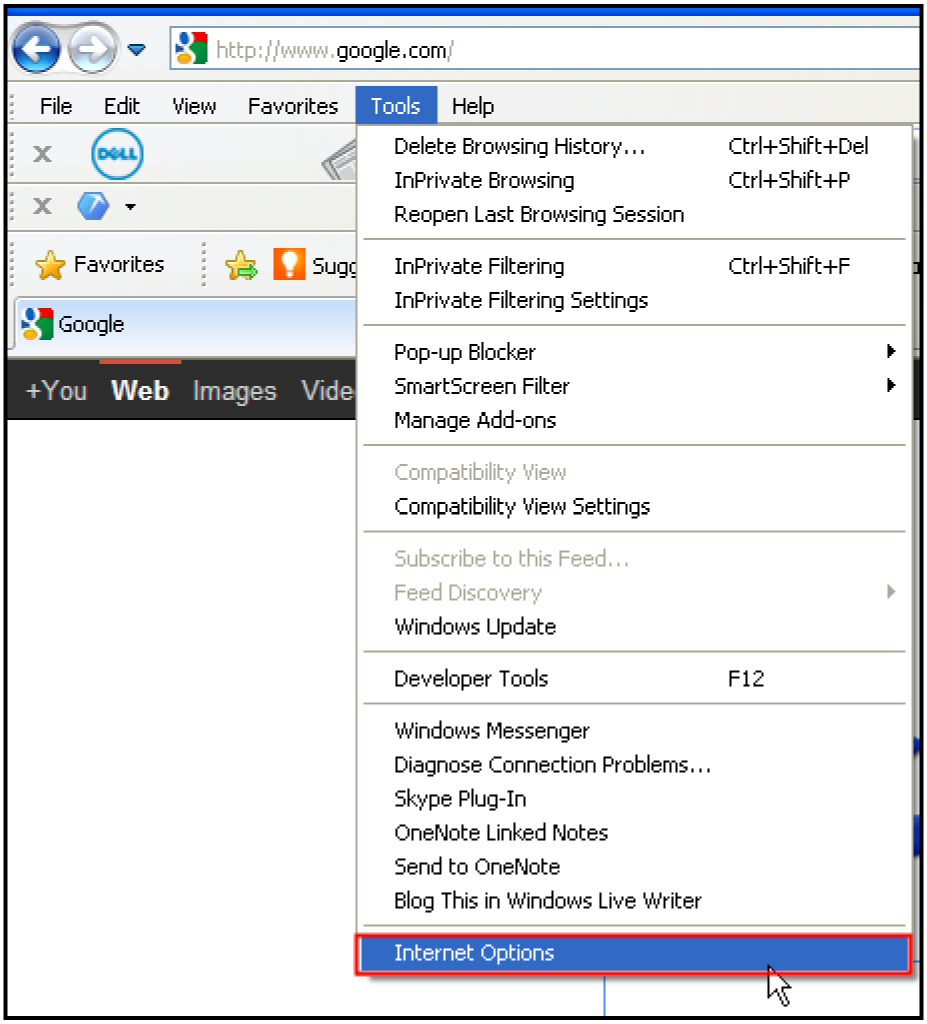


- The following display box will appear indicating the version of Internet Explorer in use.

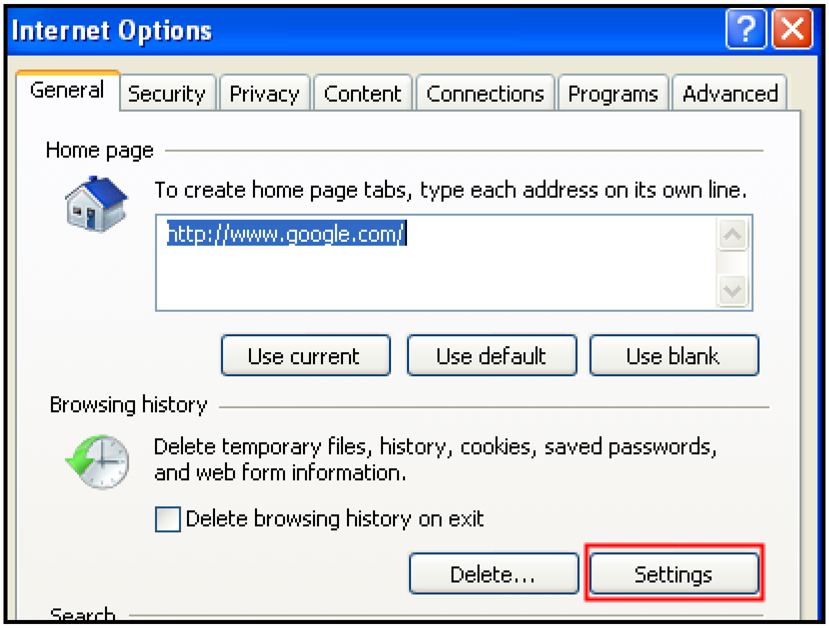
For optimal software performance, here are a few suggestions on configuring the Internet Explorer browser settings.

- **Cache Settings** – If you've experienced problems with the page not refreshing properly when searching for information on running reports, verify the browser settings are configured properly.   These settings are similar whether using Internet Explorer 6, 7 or 8.

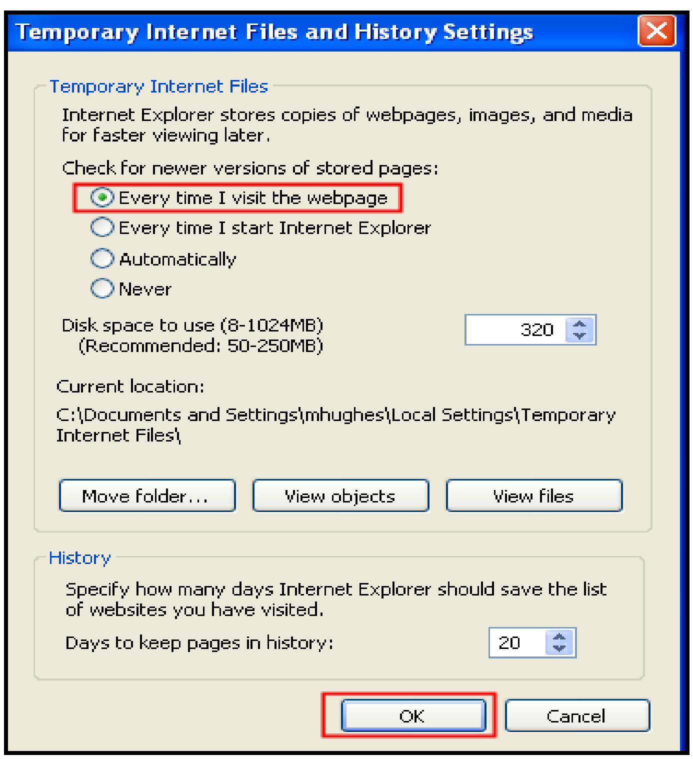
    - In Internet Explorer, go to the top of the browser and select Tools then scroll down to the bottom and select Internet Options.



- Locate the section that indicates Browsing History and click on the Settings button.



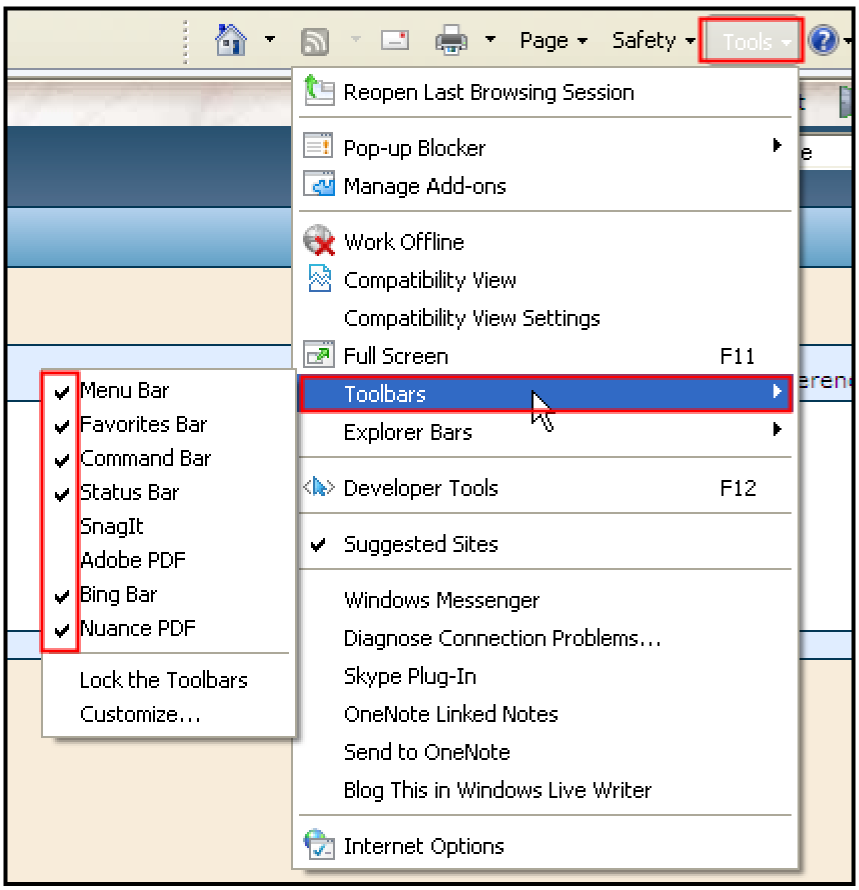
- At the top of this window, you'll see a section titled, Temporary Internet Files. Look for the radial buttons with options to choose where it prompts "Check for newer versions of stored pages."
    - Check the first radial button, which says "Every time I visit the webpage." This option allows the browser to retrieve fresh content each time you visit a page.



- Select OK
- Select OK
- Close the browser completely
- These settings will be saved the next time you log into the browser.

❖ **Viewing WebSmart from Internet Explorer** – Minimizing the use of toolbars allows more visual space on a screen.

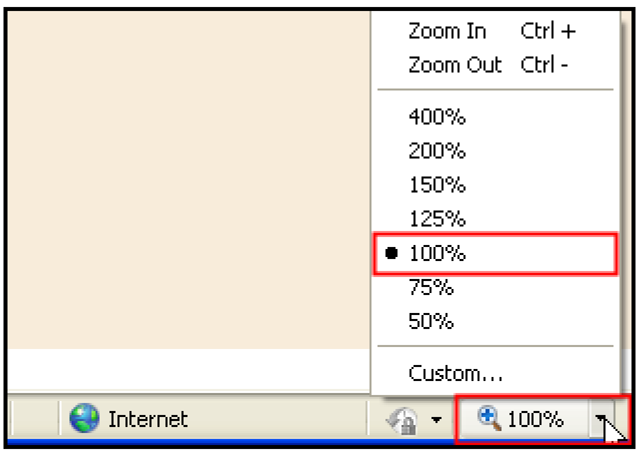
- **Remove unnecessary toolbars:**
  - Go to Tools
  - Select Toolbars
  - If you do not need any of the toolbars with a checkmark on a daily basis, uncheck it.



- **Use Full Screen Mode:** Press the F11 function key along the top of your keyboard when you are working in the browser. The window will open to full screen mode, which retracts all the toolbars and allows more visual space on the screen. Press F11 when you are in full screen mode to toggle back to normal view.

Example of Full Screen Mode View – (Minimizes tool bars)

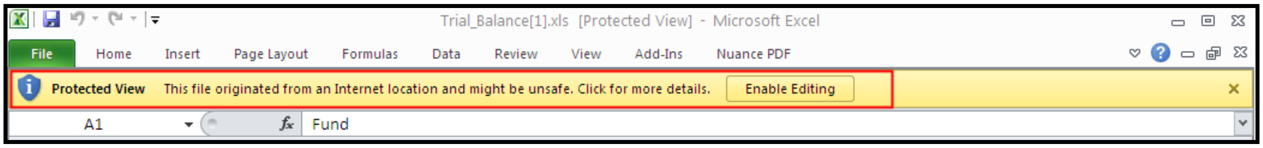
- **Set the default Zoom Level to 100%** – The zoom level status bar is located at the bottom right hand corner of the browser if your Status Bar is turned on. If this status is not set to 100%, you may experience technical problems such as items on the page not lining up properly.
    - Select the arrow on the zoom level
    - Select 100%
      If this status is not set to 100%, you may experience technical problems such as items on the page not lining up properly.



- **View multiple sessions by opening another session instead of using tabbed browsing:** When opening multiple sessions of WebSmart, don't use the tabbed browsing feature in Internet Explorer 7 or 8 because it will immediately log you off the other session. Instead, open the other session in a new window, and you can easily toggle back and forth between the two session by using tab key and view the two sessions side by side.

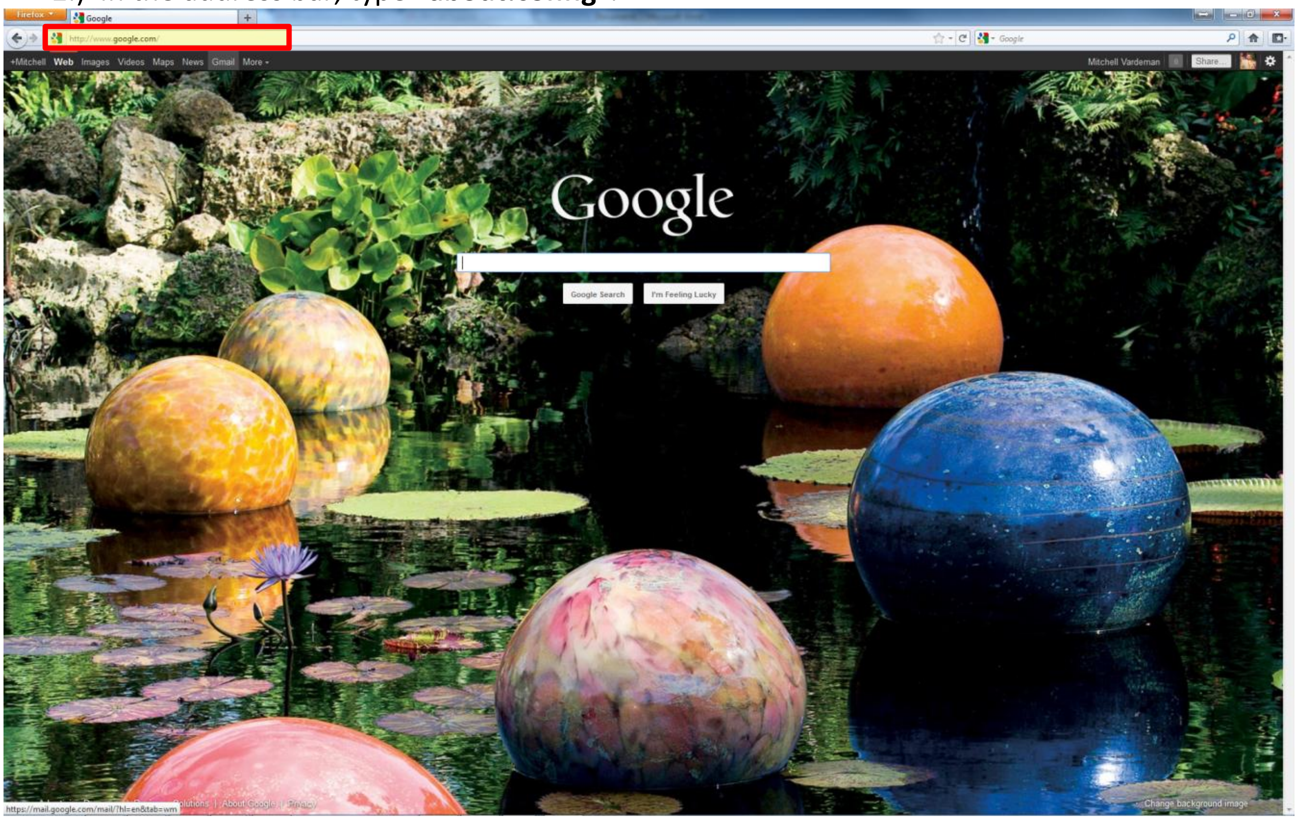
❖ **Viewing Reports** – When opening a report in Excel, depending on what version of Microsoft office you are using, you may see a message that the file is in Protected view.

- Select to Enable Editing, which will allow you to make any necessary edits to the file.

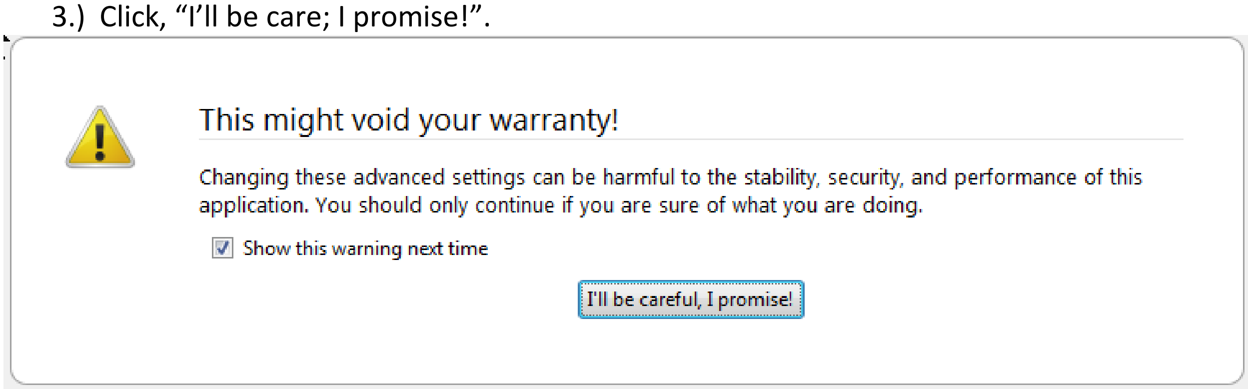


Mozilla Firefox
WebSmart Cache Setting Configuration

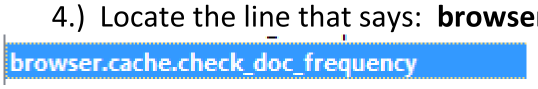
1.) Launch Firefox
2.) In the address bar, type “**about:config**”.



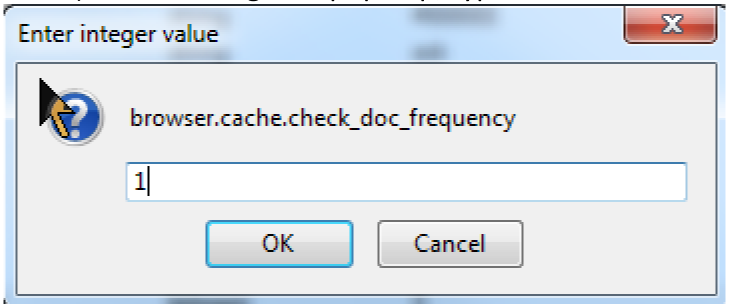
3.) Click, “I’ll be care; I promise!”.



4.) Locate the line that says: **browser.cache.check_doc_frequency** and double-click on it.



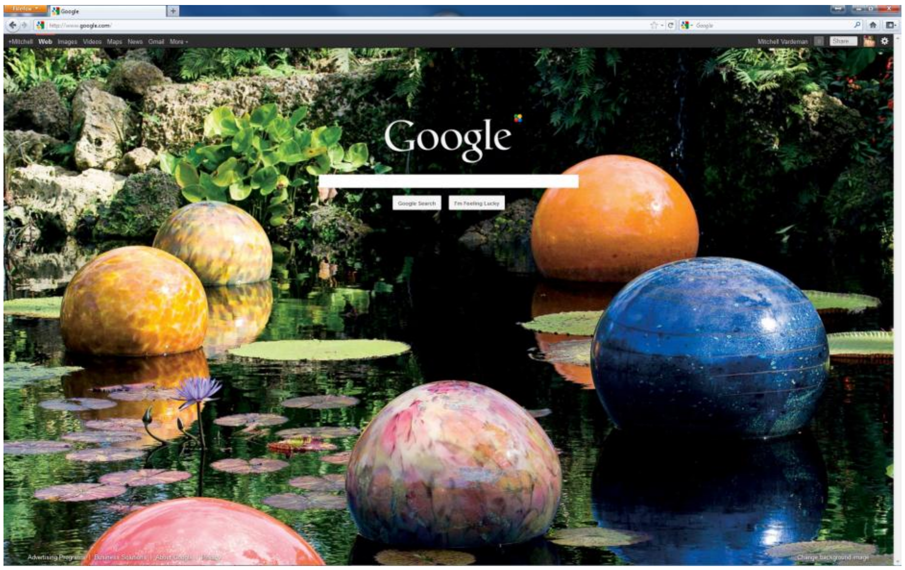
5.) In the dialog that pops-up, type 1 and click “OK”.



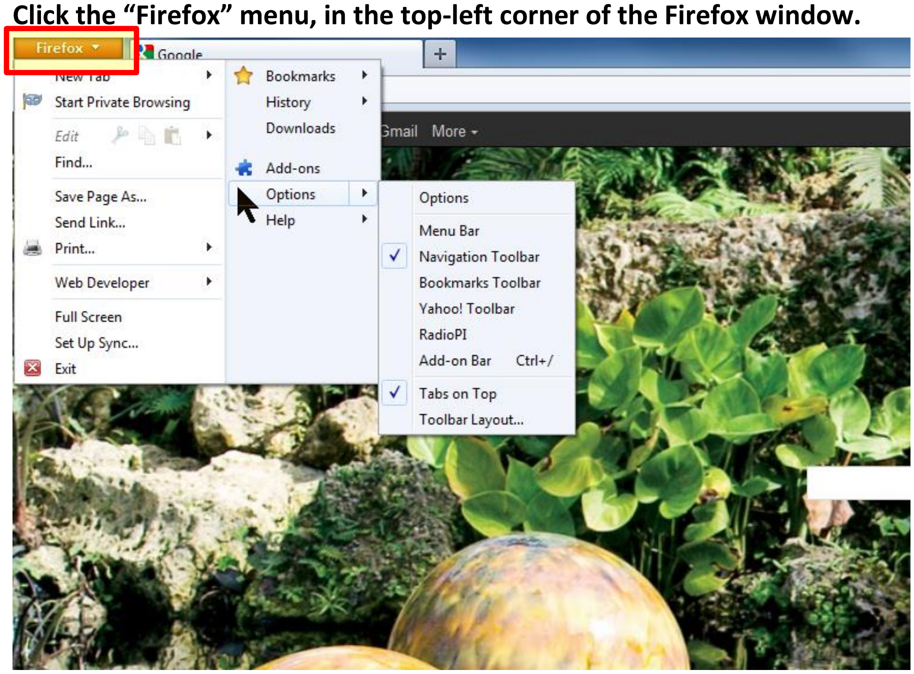
6.) Close Firefox, and re-open it. This will cause Firefox to update the page every-time you visit.

Clearing Browsing Cache in Mozilla Firefox

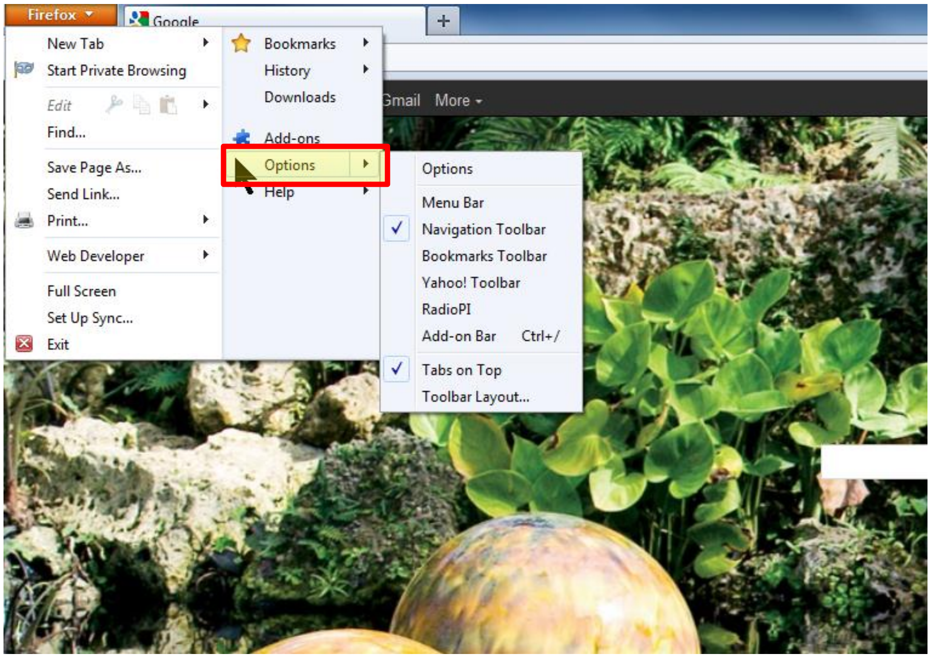
***** Depending upon the version of Firefox you are using, you may or may not be able to access "Options" in the same way, as instructed herein.**



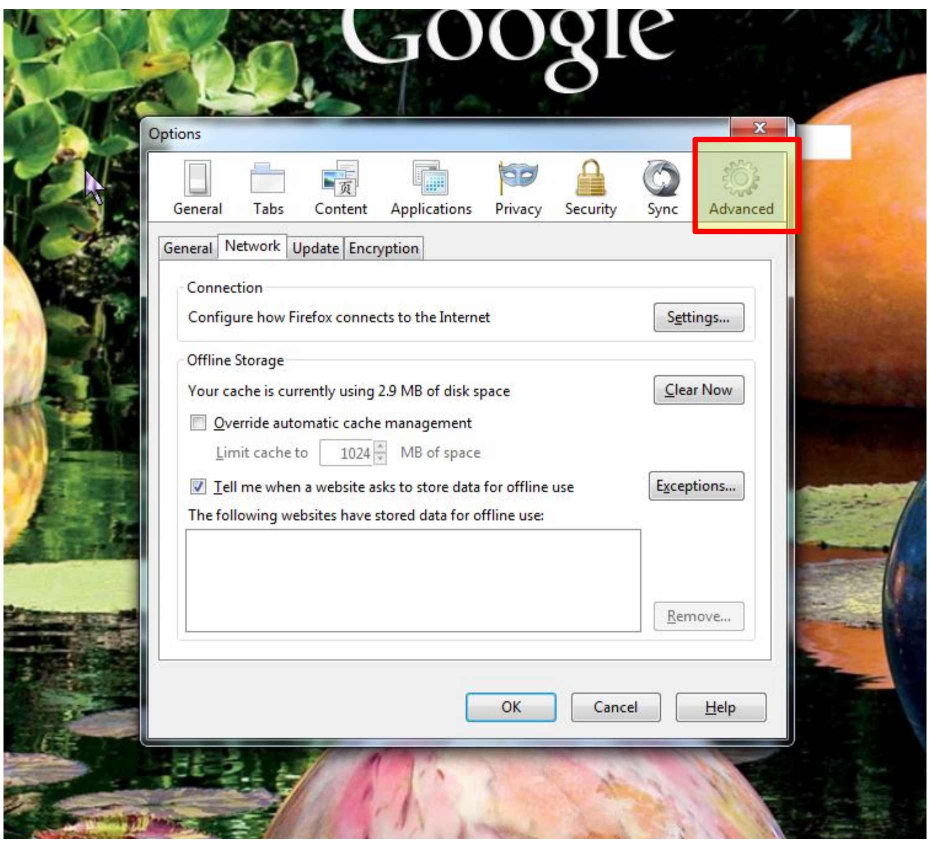
Click the "Firefox" menu, in the top-left corner of the Firefox window.



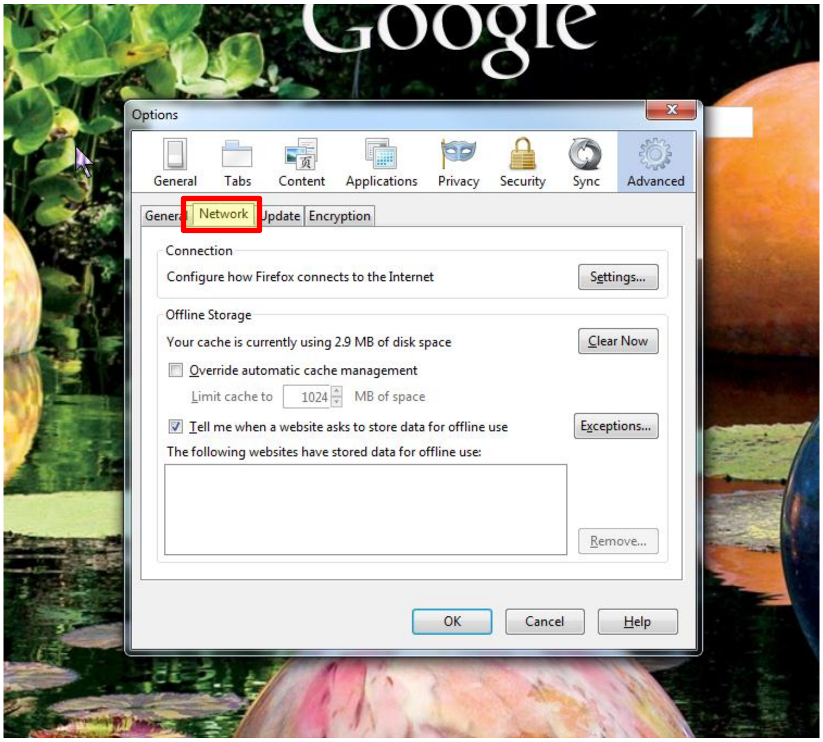
Click “Options”.



Click “Advanced”.



Click "Network".



Click "Clear Now" and then click "Okay".

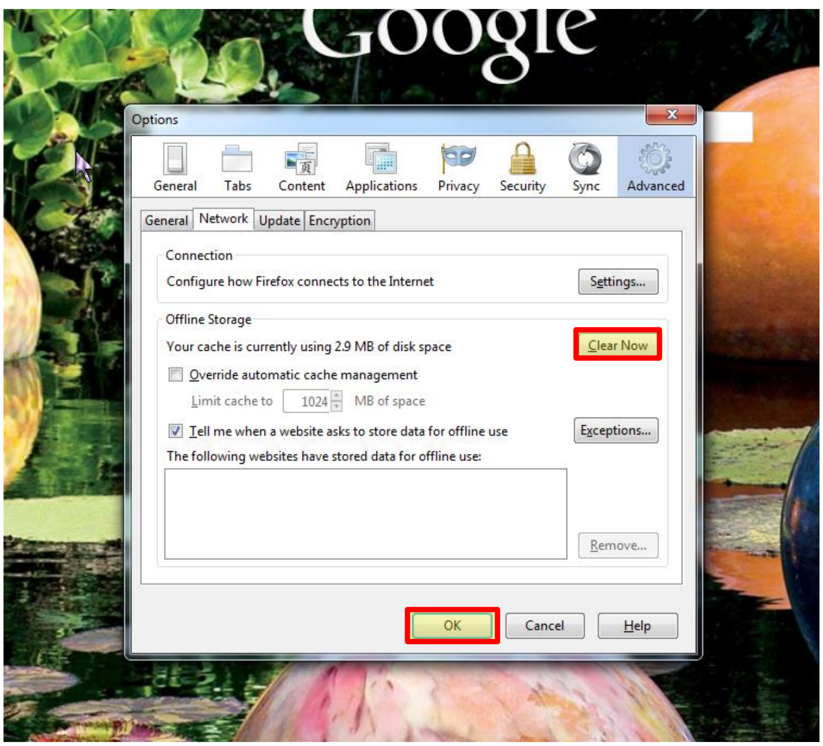
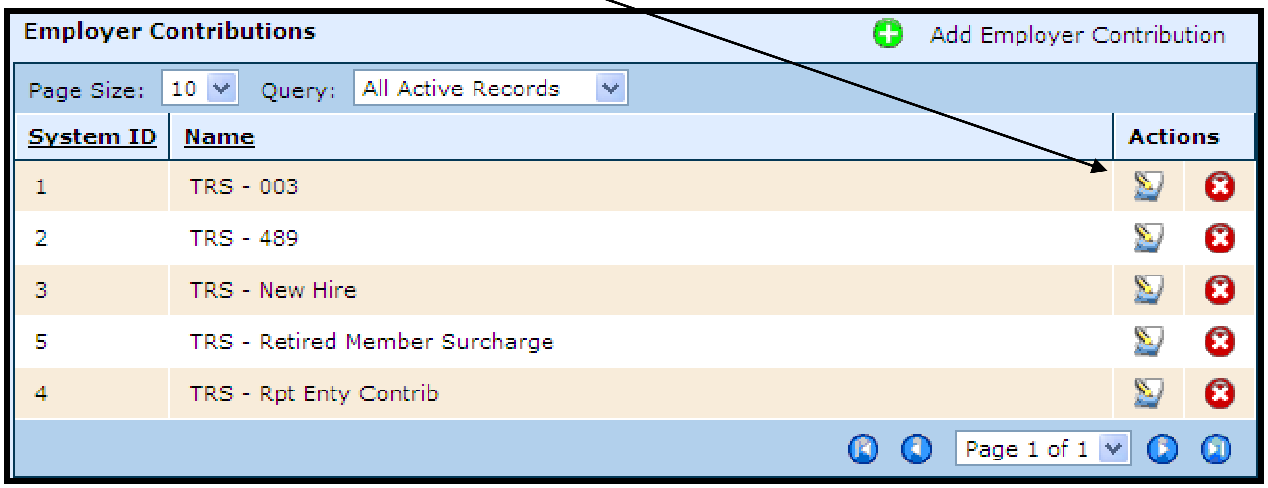


Table Updates before running September 2011 Payroll

Before running your first payroll in September, please make sure to do the following:

Go to **Finance** > **Payroll** > **Benefit Groups** > **Contributions**

- Select the TRS – 003



Employer Contributions

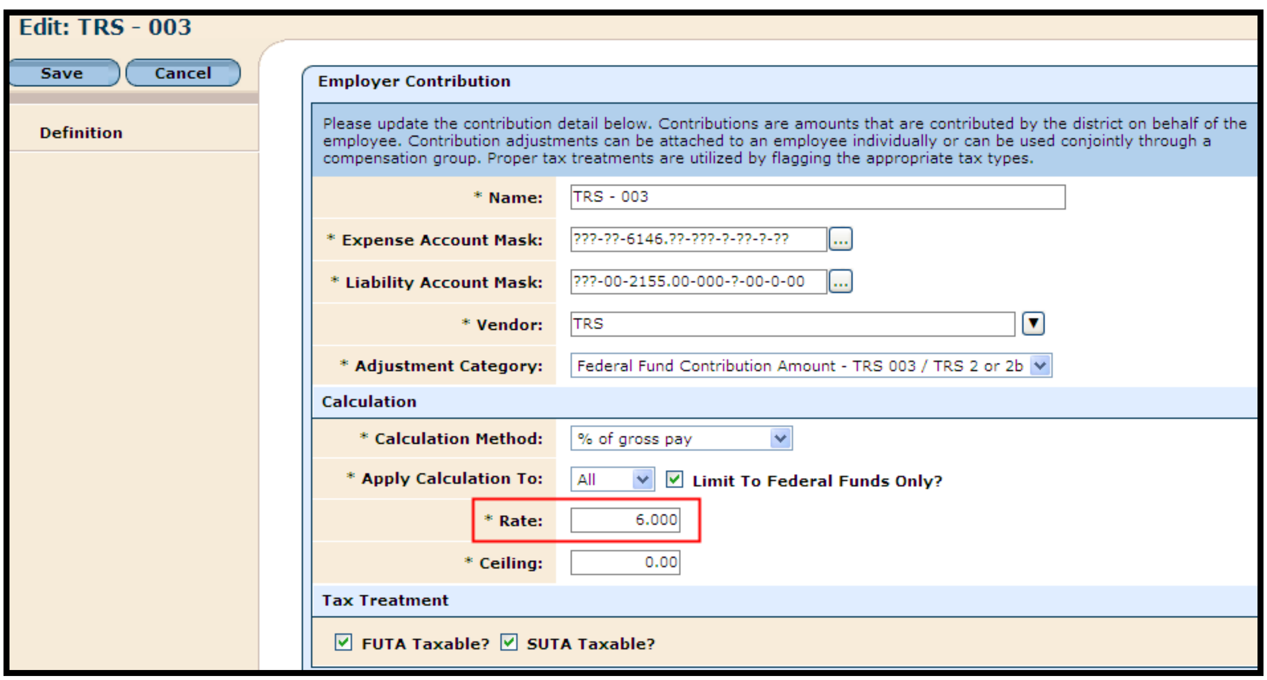
Add Employer Contribution

Page Size: 10 Query: All Active Records

System ID	Name	Actions
1	TRS - 003	
2	TRS - 489	
3	TRS - New Hire	
5	TRS - Retired Member Surcharge	
4	TRS - Rpt Enty Contrib	

Page 1 of 1

- Change the Rate from 6.644% to 6%
- Select Save



Edit: TRS - 003

Save Cancel

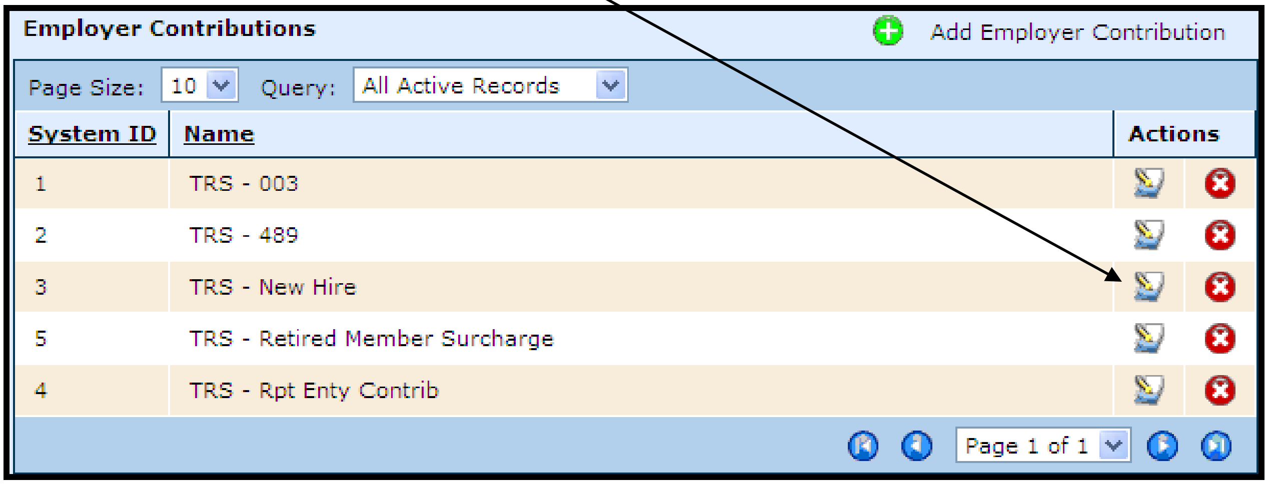
Definition

Employer Contribution

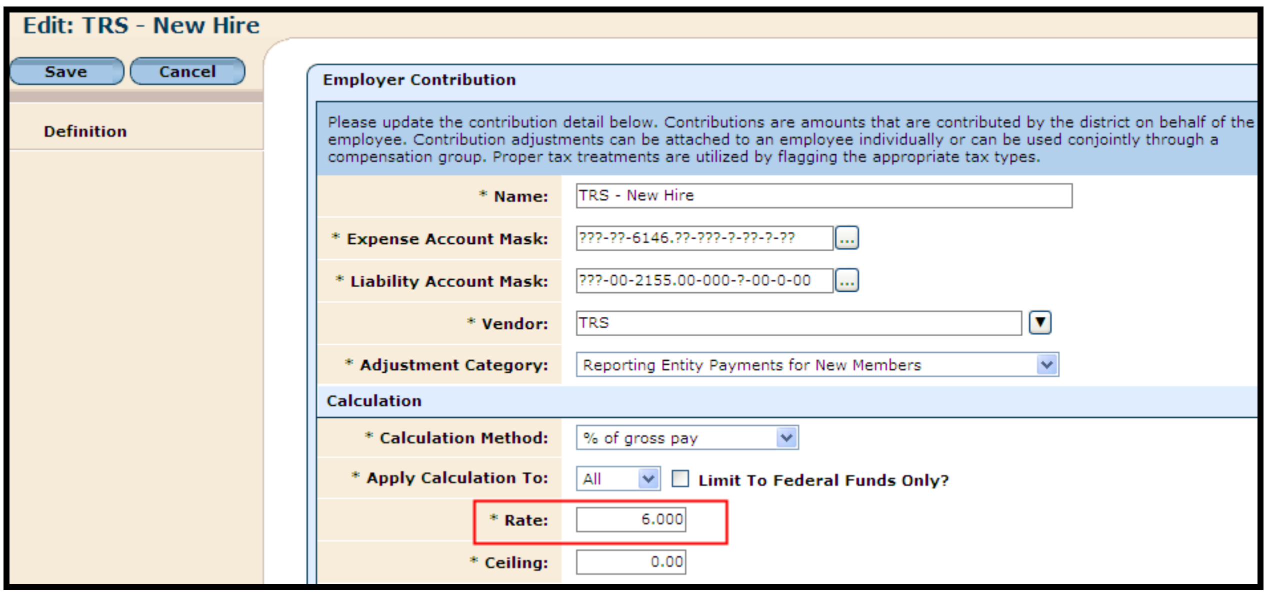
Please update the contribution detail below. Contributions are amounts that are contributed by the district on behalf of the employee. Contribution adjustments can be attached to an employee individually or can be used conjointly through a compensation group. Proper tax treatments are utilized by flagging the appropriate tax types.

* Name:	TRS - 003
* Expense Account Mask:	???-??-6146.??-???-?-??-?-??
* Liability Account Mask:	???-00-2155.00-000-?-00-0-00
* Vendor:	TRS
* Adjustment Category:	Federal Fund Contribution Amount - TRS 003 / TRS 2 or 2b
Calculation	
* Calculation Method:	% of gross pay
* Apply Calculation To:	All; Limit To Federal Funds Only?
* Rate:	6.000
* Ceiling:	0.00
Tax Treatment	
FUTA Taxable?	SUTA Taxable?

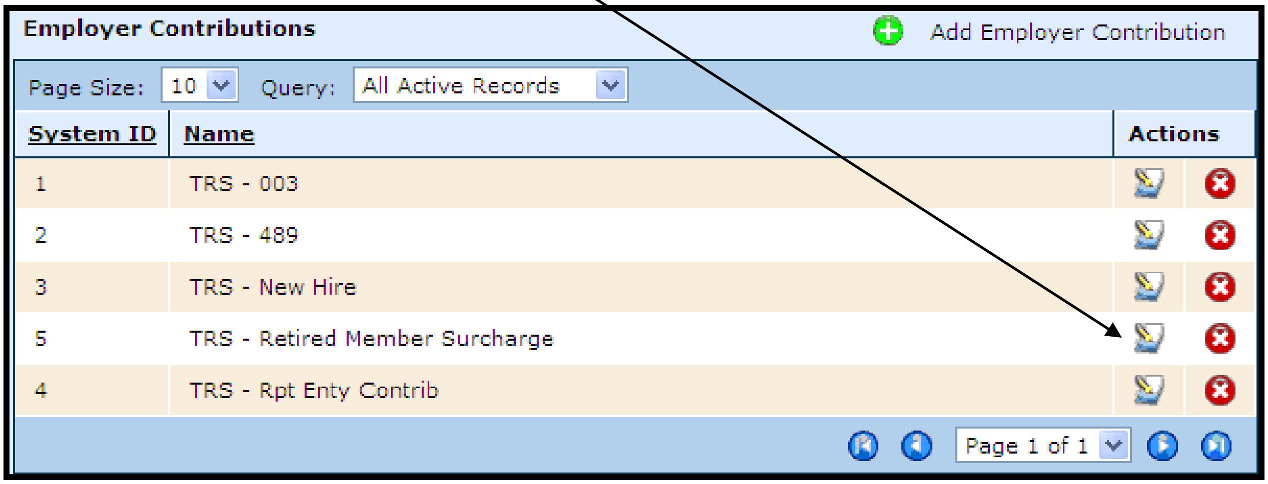
- Select the TRS – New Hire



- Change the Rate from 6.644% to 6%
- Select Save



- Select the TRS – Retired Member Surcharge



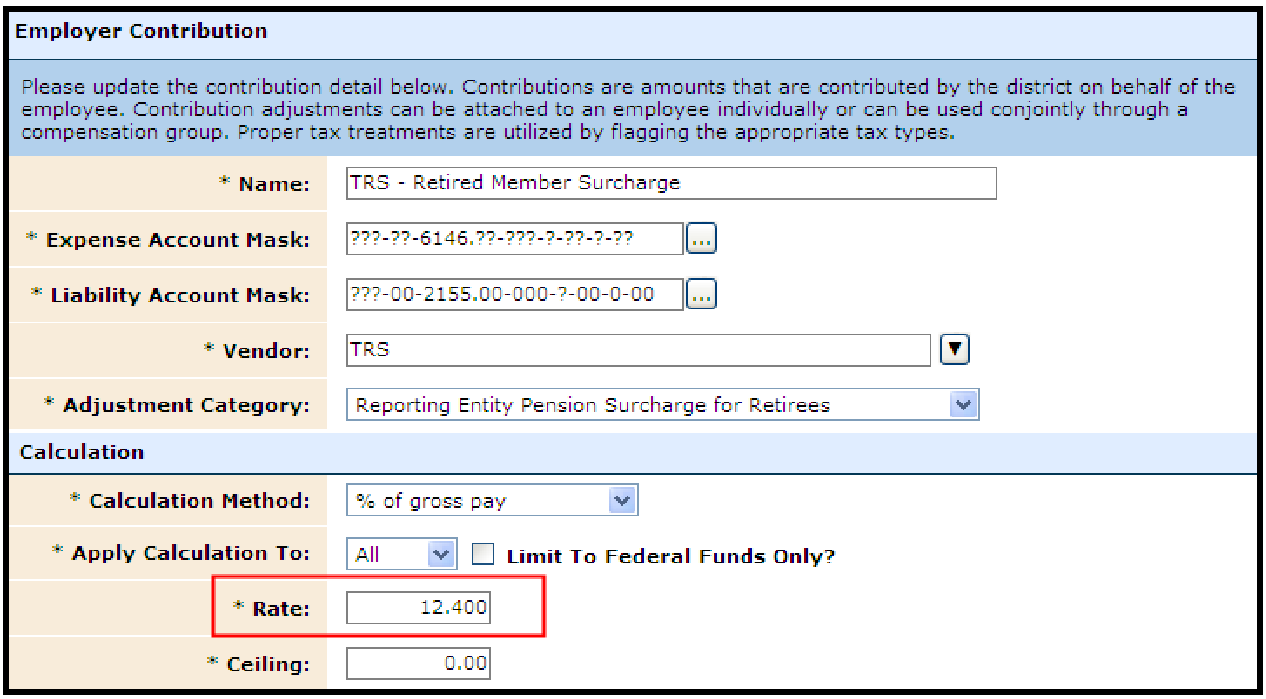
Employer Contributions Add Employer Contribution

Page Size: 10 Query: All Active Records

System ID	Name	Actions
1	TRS - 003	
2	TRS - 489	
3	TRS - New Hire	
5	TRS - Retired Member Surcharge	
4	TRS - Rpt Enty Contrib	

Page 1 of 1

- Change the Rate from 13.044% to 12.4%
- Select Save



Employer Contribution

Please update the contribution detail below. Contributions are amounts that are contributed by the district on behalf of the employee. Contribution adjustments can be attached to an employee individually or can be used conjointly through a compensation group. Proper tax treatments are utilized by flagging the appropriate tax types.

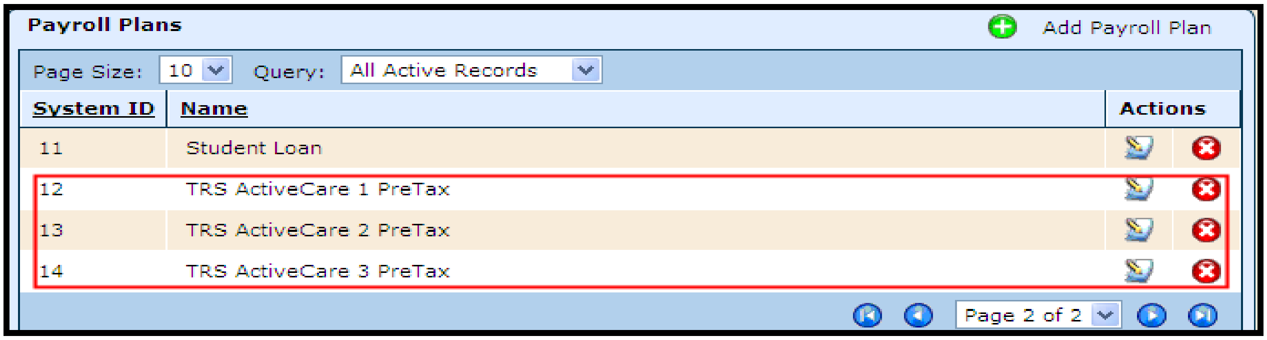
* Name:	TRS - Retired Member Surcharge
* Expense Account Mask:	???-??-6146.??-???-?-??-?-??
* Liability Account Mask:	???-00-2155.00-000-?-00-0-00
* Vendor:	TRS
* Adjustment Category:	Reporting Entity Pension Surcharge for Retirees

Calculation

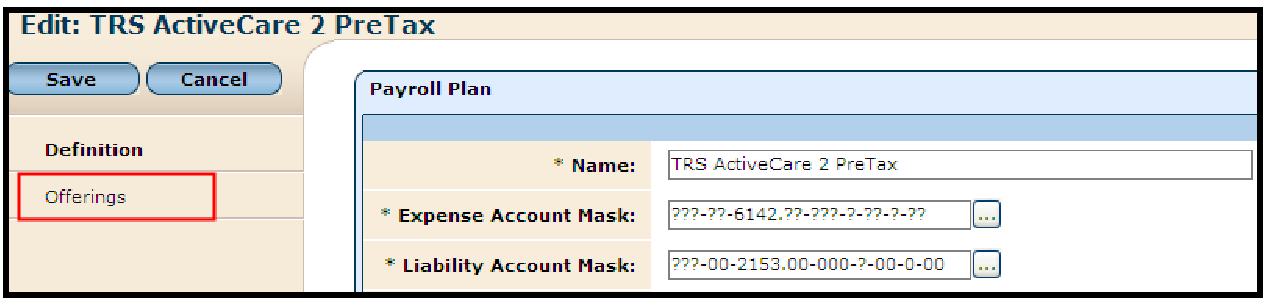
* Calculation Method:	% of gross pay
* Apply Calculation To:	All ☐ Limit To Federal Funds Only?
* Rate:	12.400
* Ceiling:	0.00

Go to **Finance** > **Payroll** > **Payroll Plans**

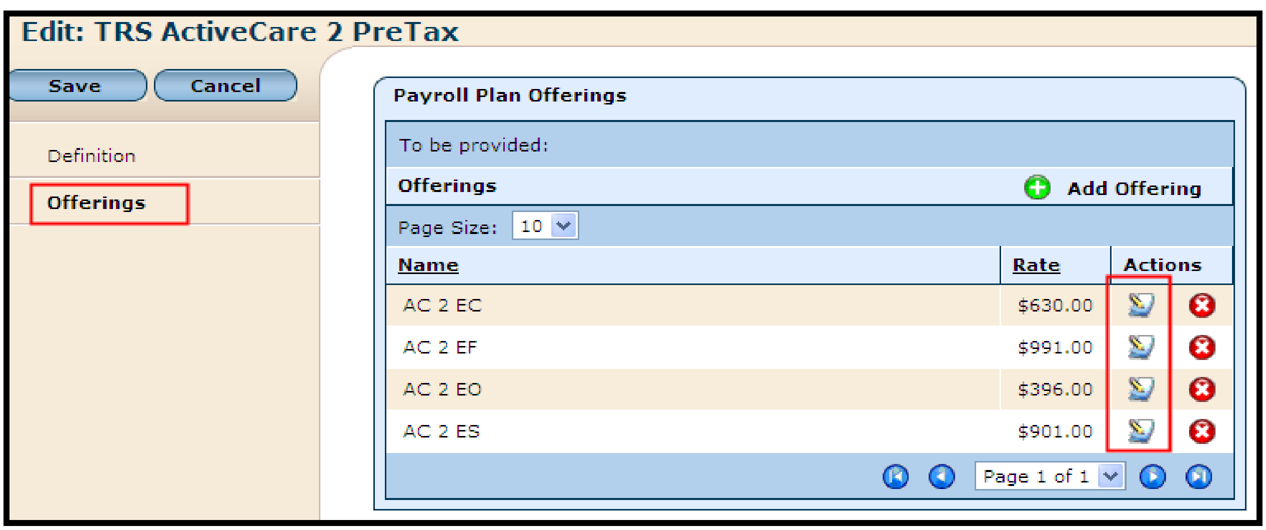
- Select the TRS ActiveCare – Pretax (or you may have them listed with a different description



- Select the **Offerings** tab – here you'll see all the available health insurance plans offered through TRS ActiveCare



- Select the edit action for each plan and enter the rate for each of the new premiums



- Once you've changed each plan, select save – this process mass updates each employee's premiums for the September payroll.