# WFS Wesleyan Financial System
SMART DOC TOOLBAR USER GUIDE

Introduction

The **Smart Doc Toolbar** is a set of icons across the top of all Smart Doc pages that provide easy access to functionality. In some cases the toolbar functionality replaces tasks that were completed on other parts of the page. The toolbar also provides new functionality that has not been available on the Smart Docs in the past. The Toolbar remains in view even when scrolling down a page. If you do not see the Toolbar on a Smart Doc page, click the "HOME" link at the top of the page and re-navigate to the Smart Doc.
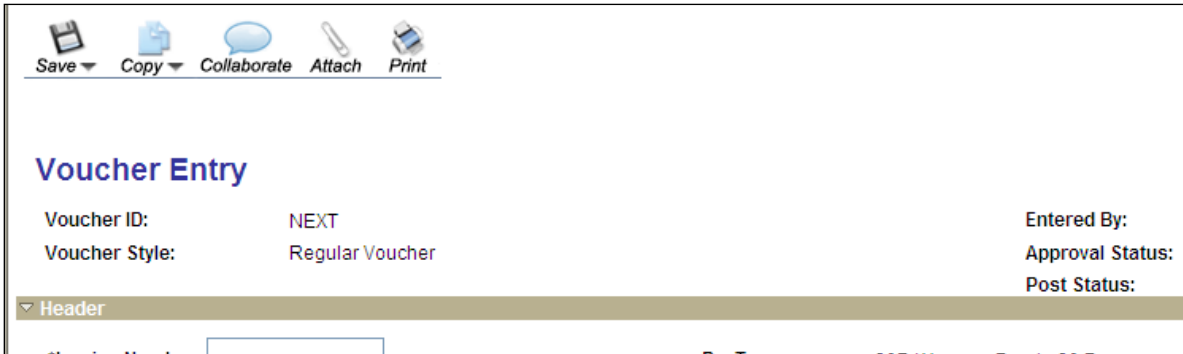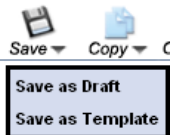

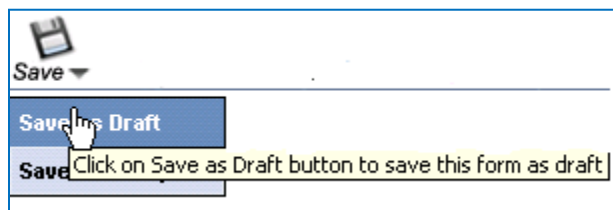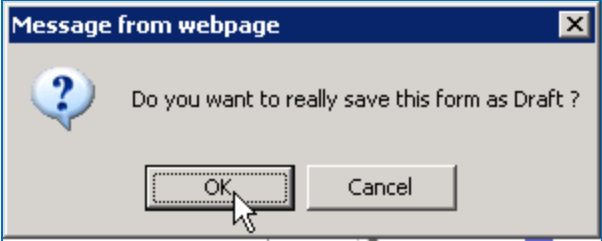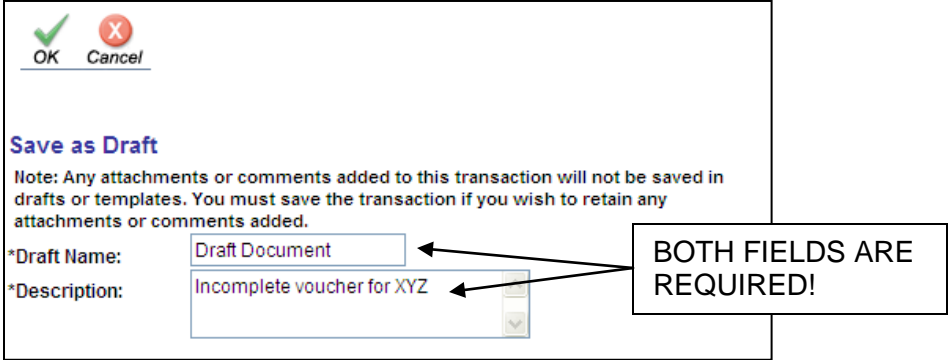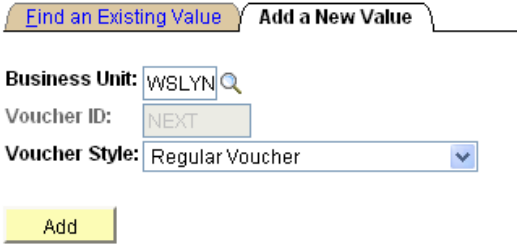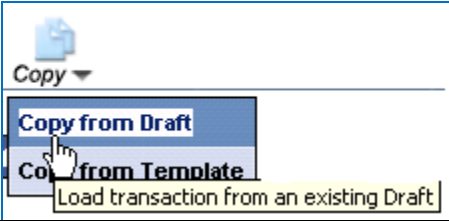| SAVE	
	Clicking the Save icon will save the data to the database exactly in the manner of the Save button at the bottom of a page. On all Smart Doc pages **_the Save icon on the toolbar replaces the Save button_** at the bottom of the screen. To save, just click on the icon.
Save as Draft/Copy from Draft	
	Save as Draft allows you to save the Smart Doc without entering data into all required fields. Save as Draft allows you to 'Save for Later' and does not save to delivered PeopleSoft tables. You can then come back later and 'Copy from Draft' to load the data so you can complete the entry. **_You can only 'Save as Draft' before you save the transaction to the PeopleSoft system. A complete document with a document ID cannot be saved as a draft._** **Comments and attachments WILL be saved with a draft, but the appearance of the icon will not change until the document is saved with a document ID.**
1. Enter any data you want to populate. You do not have to enter all required information to "Save as Draft".	**TIP:** Leave one or more required data elements blank if you are going to save a document as a draft or template. You will not be able to accidentally save it with a document ID.
2. Hover over the Save icon and select the action 'Save as Draft' from the drop down list.	
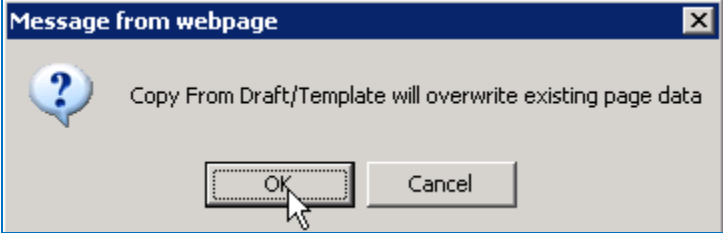
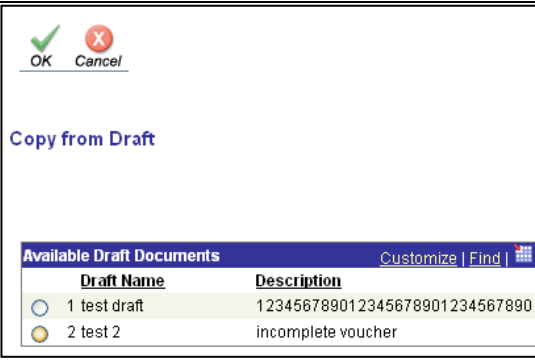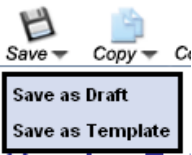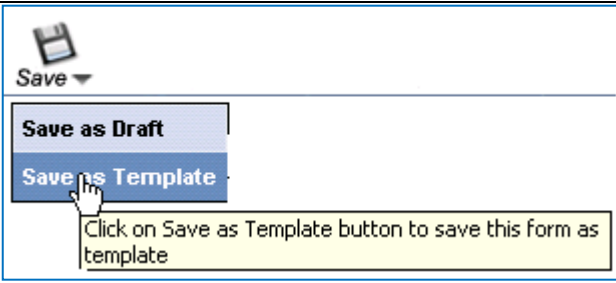|		
3. A confirmation message will appear. Click OK to continue.	**Message from webpage** ✕ ❓ Do you want to really save this form as Draft ? [OK] [Cancel]	
4. Give the draft a convenient name and description for easy retrieval (the Description field is only 30 characters long). Drafts are user specific. No one else can see your drafts.	✓ ❌ OK Cancel **Save as Draft** Note: Any attachments or comments added to this transaction will not be saved in drafts or templates. You must save the transaction if you wish to retain any attachments or comments added. *Draft Name: Draft Document *Description: Incomplete voucher for XYZ	BOTH FIELDS ARE REQUIRED!
5. A confirmation message will appear over the Toolbar that your draft saved successfully. A document ID **_will not_** be generated. The Smart Doc can now be closed if you wish.	**Draft : Draft Document Saved Successfully**	
6. When you are ready to continue working on the document you will perform an 'Add' action for the desired component.	<u>Find an Existing Value</u> \ **Add a New Value** **Business Unit:** WSLYN 🔍 **Voucher ID:** NEXT **Voucher Style:** Regular Voucher ⌄ [Add]	
7. To retrieve your saved draft, hover over the Copy Icon and choose 'Copy from Draft'.	📄 Copy ▾ **Copy from Draft** Co🖑from Template Load transaction from an existing Draft	
8. Click OK on the confirmation. When you copy in a draft it will overwrite any information that may have already been entered.	**Message from webpage** ✕ ❓ Copy From Draft/Template will overwrite existing page data [OK] [Cancel]	

9. Select the desired Draft by clicking the radio button next to the draft you wish to select. Click OK to copy all of the information into the current document.	OK Cancel **Copy from Draft** **Available Draft Documents** Customize | Find | **Draft Name** **Description** ○ 1 test draft 12345678901234567890123457890 ○ 2 test 2 incomplete voucher
10. A confirmation message will appear that the document has loaded.	**Draft : Draft Document Loaded Successfully**
11. All of the data will be copied back to the document. You can now continue to enter the required information and do a regular Save. You can also 'Save as Draft' as many times as you want by following the above steps again.	<u>**IMPORTANT NOTE**</u>: Once you copy from a draft it will no longer be available to copy. ***You can only copy a draft once.*** If you want to copy the data multiple times use the Save as Template functionality.

Save as Draft/Copy from Draft

Save ▼ Copy ▼ C **Save as Draft** **Save as Template**	Just like 'Save as Draft', 'Save as Template' permits the Smart Doc to be saved without entering data into all required fields. Unlike drafts, templates can be copied as many times as you need. Templates are perfect for recurring transactions where you don't want to enter the same data over and over again. The steps are exactly the same as for 'Save as Draft' functionality, except choose Template instead of Draft when prompted. ***As with the 'Save as Draft' functionality, you can only 'Save as Template' before saving the transaction to WFS. Please take note that dates may also be saved with templates. When copying from a template you will usually need to change the date. Comments and attachments WILL be saved with a draft, but the appearance of the icon will not change until the document is saved with a document ID. IF YOU INCLUDE AN INVOICE NUMBER ON A TEMPLATE, BUT SURE TO CHANGE IT AFTER COPYING. DUPLICATE INVOICE NUMBERS FOR THE SAME VENDOR WILL CREATE AN ERROR!***
Enter the data on the Smart Doc you wish to retain for the template. Hover over the SAVE icon and choose 'Save as Template' from the list.	Save ▼ **Save as Draft** **Save as Template** Click on Save as Template button to save this form as template

Give the template a name and description so you can easily retrieve it. All templates are saved as "private" templates, meaning that only the person who saved it can retrieve it. The description field is only 30 characters.	**OK** **Cancel** **Save as Template** Note: Any attachments or comments added to this transaction will not be saved in drafts or templates. You must save the transaction if you wish to retain any attachments or comments added. Template Type: Private Template *Template Name: Fisher Equip ← **BOTH FIELDS ARE REQUIRED!** *Description: Fisher Equip with default SK
A confirmation will appear that the template was saved	**Template : Fisher Equip Saved Successfully**
To retrieve the template use the 'Add' action for the Smart Doc	<u>Find an Existing Value</u> **Add a New Value** Business Unit: WSLYN Voucher ID: NEXT Voucher Style: Regular Voucher Add
Hover over the 'Copy' icon on the Toolbar and choose the Copy from Template action.	Copy ▼ **Copy from Draft** **Copy from Template** Load transaction from an existing Template
In the template window click the 'Search' button to retrieve a list of all available templates.	**OK** **Cancel** **Copy from Template** Search OperatorID: Template Name: Template Type: Search ← Click "Search" to retrieve template list.

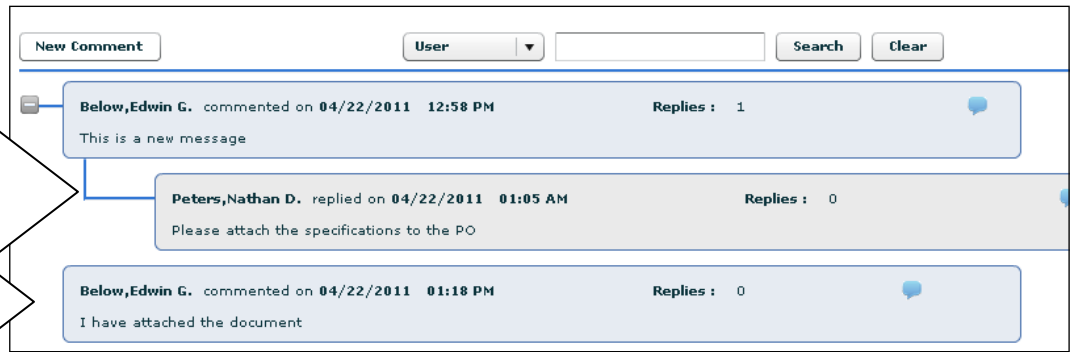|	
Select the template by clicking the radio button next to the template name and clicking 'OK' (in the example, "WB Mason template was selected) Click radio button to select template	OperatorID: 🔍 Template Name: 🔍 Template Type: [▼] Search **Available Template Documents** Customize | Find | 📅 First ◀ Template Name Description Template Type Created By ○ 1 adult ed draft t Private Template Below,Edwin G. ○ 2 Fisher Sci Fisher Sci with smartkey Private Template Below,Edwin G. ◉ 3 WB Mason WB Mason template w. SK Private Template Below,Edwin G. ○ 4 Monthly Adult Ed Monthly paymnt to Midltwn AdEd Private Template Below,Edwin G.
After the confirmation appears the Smart Doc can be completed and saved.	**Template : WB Mason Loaded Successfully** IMPORTANT NOTE: **If a date or invoice number was copied from the template, update it with the correct date and/or a different invoice number.**
COLLABORATE	
Collaborate	Collaborate is the new method of creating and saving comments regarding a specific Smart Doc. Use Collaborate for your use to keep notes regarding the Smart Doc or for messages to any approvers **EXCEPT AP.** *Do not use Collaborate for messages to AP; use the comment field on the screen.*
After clicking the Collaborate icon, type the message in any font, size or color you wish. *The 'Submit' button must be clicked to save the comment.*	**New Comment** Verdana [▼] 10 [▼] **B** *I* U ■ http:// This is a test message Click "Submit" after typing comment. Submit Cancel
After clicking 'Submit' the comment will appear at the top of the Collaborate screen.	✓ OK [New Comment] [User ▼] [Search] [Clear] Below,Edwin G. Commented on 04/21/2011 3:45 PM Replies : 0 This is a test message
Click OK to save the comment and return to the Smart Doc. A confirmation will display.	✓ OK
On the Smart Doc screen, click Save. The icon will change appearance.	Collaborate Appearance with no comment. Collaborate Appearance when a comment is present (if a comment is saved with a draft or template document, the appearance will not change until the full document is saved with a document ID).

While the document is still pending the comment can be edited or deleted. After submitting the document another user can reply to the original comment.	**Edit Comment** **Delete Comment** **IMPORTANT NOTE**: <u>**A comment cannot be edited or deleted after the document has been submitted to workflow.**</u>
Another user or an approver can 'Reply' to a comment or create a new comment. A 'Reply' is graphically linked to the original comment.	Click here for a new comment Click here to reply to a comment New Comment User ▼ [ ] Search Clear Below,Edwin G. commented on 04/22/2011 12:54 PM Replies : 0 test collaborate

New Comment   User ▼ [ ] Search Clear

Below,Edwin G. commented on 04/22/2011 12:58 PM   Replies : 1
This is a new message

Reply Comment →   Peters,Nathan D. replied on 04/22/2011 01:05 AM   Replies : 0
Please attach the specifications to the PO

New Comment →   Below,Edwin G. commented on 04/22/2011 01:18 PM   Replies : 0
I have attached the document
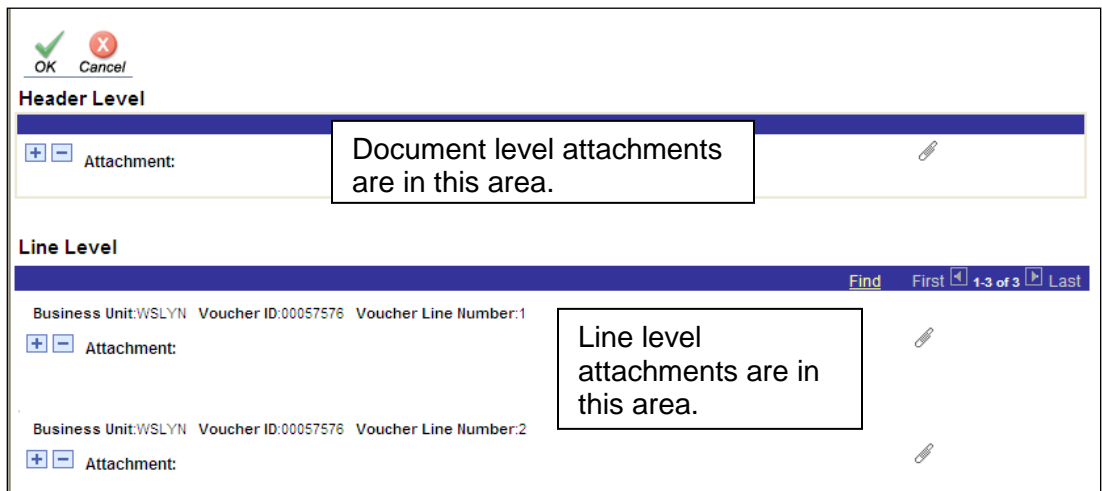
ATTACH

Attach	The Attach function allows documents to be saved at the header level (for the entire document) or at the line level. ***The Toolbar Attach function replaces the Attachment section on all the Smart Docs.*** Attachments from historic documents can now be found by clicking the Toolbar Attach icon. **Please limit attachment names to 50 Characters.**
After clicking Attach, a window will appear for attaching documents as shown. Attachments can be made at the header or line level, or both. Attachments cannot be made at the distribution line level.	OK Cancel **Header Level** [+][−] Attachment: Document level attachments are in this area. **Line Level** Find First ◄ 1-3 of 3 ► Last Business Unit:WSLYN Voucher ID:00057576 Voucher Line Number:1 [+][−] Attachment: Line level attachments are in this area. Business Unit:WSLYN Voucher ID:00057576 Voucher Line Number:2 [+][−] Attachment:
	Click to view attachment

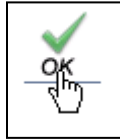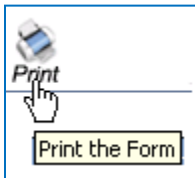|	
Click the "paper" icon to view an attachment. Click the "paperclip" icon to add an attachment. Multiple attachments can be made using the "+".	**Business Unit**:WSLYN **Voucher ID**:00057576 **Voucher Line Number**:1 [+] [-] **Attachment:** Voucher_55232.docx **Uploaded By** - EBELOW **Time** - April.21.2011 03:28 PM **Business Unit**:WSLYN **Voucher ID**:00057576 **Voucher Line Number**:2 [+] [-] **Attachment:** Click to add an attachment
Click "OK" at the top of the attachment screen to save and return to the Smart Doc.	OK
After returning to the Smart Doc, click SAVE. The icon will change appearance to give a visual clue that there is at least one attachment.	*Attach* Appearance when there is no attachment. *Attach* Appearance when attachments are present (if an attachment is saved with a draft or template document, the appearance will not change until the full document is saved with a document ID).
PRINT	
Print Print the Form	The Print icon prints the document in the same manner as the PRINT button at the bottom of the page. Just click Print and a PDF of the document will open in a new window.