



SMART Insight

General User Guide

Introduction

Welcome to the user guide.

About this Guide

This comprehensive guide is designed to assist in the use of the administration tools and demonstrate where the other modules may link into administrative features. The software is explained using unambiguous language and a 'screenshot' format for ease of understanding and relevancy. The manual is divided into several sections ranging from accessing the SMART system and managing user accounts to changing the text of system notification emails.

System Requirements

To run any of the SMART Global Solutions web products an Internet connection is required and the use of a compatible web browser is recommended. The speed of the Internet connection will have a large impact on the performance of the SMART system so the faster the connection the better the experience will be. Currently the system has been tested and is functional in all major browsers; however, it is recommended that Microsoft Internet Explorer is used as this has been found to offer the best performance. It is highly recommended that the latest version of Internet Explorer is used and this can be obtained from the official Microsoft website.

Screen Resolution

SMART Insight has been designed to work in all screen resolutions. For best viewing performance a minimum resolution of 1024 x 768 pixels is recommended.

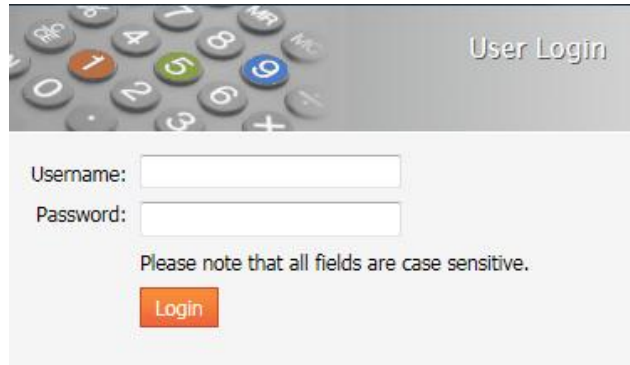
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Section 1 – Accessing the SMART System

The SMART system can be accessed from any computer or mobile device with a web connection through the web address provided by SMART Global Solutions.

Upon entering the web address the login page will be displayed:



Enter the Username and Password combination provided by your system administrator and click the Login button.

Note: The Username and Password fields are case sensitive.

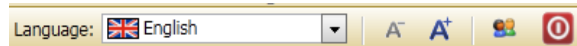
After logging in successfully the Dashboard, which offers a quick summary of the system data and provides quick links to a user’s current actions and tasks, will be displayed.



Section 2 – User Profile and Preferences

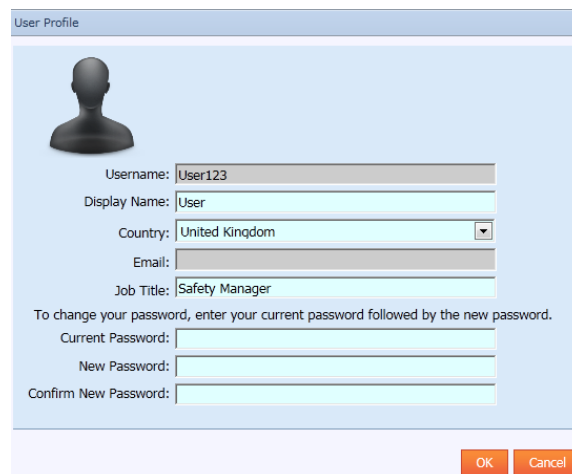
On the right of the main toolbar are a range of options to control user preferences and make adjustments to a user's preferences.

The default language for the system can be changed using the language drop down list which will include all of the languages that have been setup by the company operating the system. Next to this are options to increase or decrease the text size of all text on the website. The final two icons allow a user to adjust their profile and logout of the system. It is recommended that whenever a user finishes using the system they click on the logout button before closing the web browser to ensure their session is securely closed.



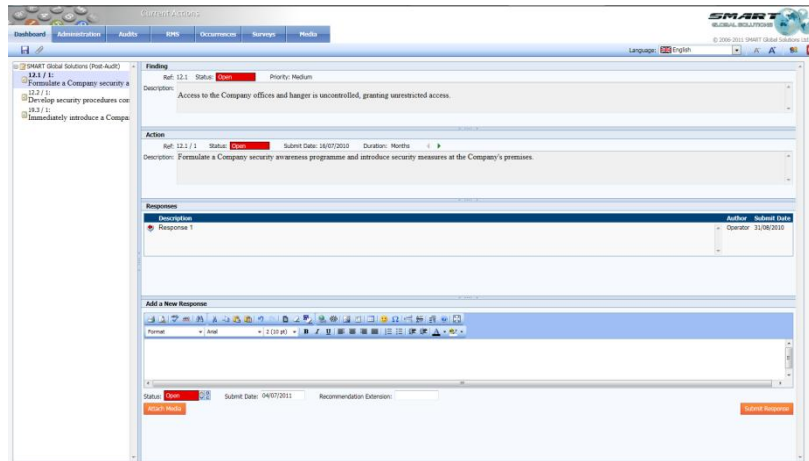
Clicking the 'User Profile' icon opens the popup window shown below which allows customisation of various aspects of an account's details. All fields with a green background are editable and can be updated by entering the new desired text and clicking on the OK button.

To update a password the current password must be entered first, followed by the new password. If the current password is incorrect, the new passwords do not match or the password change has not worked for some reason the system will provide further instruction. The password fields should be left blank if they are not required during this update to the user's profile.

A 'User Profile' popup window with a light blue header and a white body. It features a grey silhouette of a person's head and shoulders. Below the silhouette are several input fields: 'Username:' with 'User123', 'Display Name:' with 'User', 'Country:' with a dropdown menu showing 'United Kingdom', 'Email:', and 'Job Title:' with 'Safety Manager'. Below these is a section for password changes with the instruction: 'To change your password, enter your current password followed by the new password.' This section contains three fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom right of the window are two orange buttons labeled 'OK' and 'Cancel'.

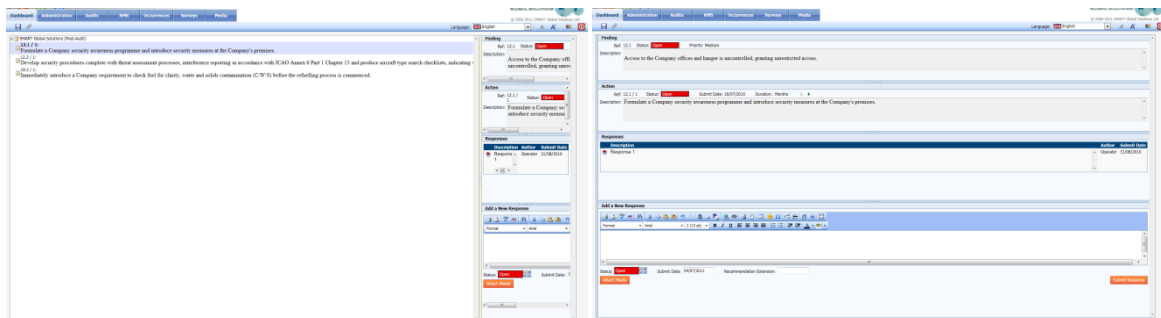
Section 3 – Responding to Actions

The easiest way to respond to action items is via the Current Actions page which is accessible via either the My Actions link from quick links on Dashboard or under the Dashboard menu option.



The Current Actions page is divided into two distinct sections: the tree-view on the left where the desired action can be selected and the main panel on the right where the action is reviewed and updated.

The balance of how much space each of these takes up can be adjusted by dragging the divider to the left or right. Below you can see the panel fully to the left and right to show the contrast between the available views.



Alongside the option to drag the divider, there are two small arrow buttons that minimise the section in whichever direction it clicked.

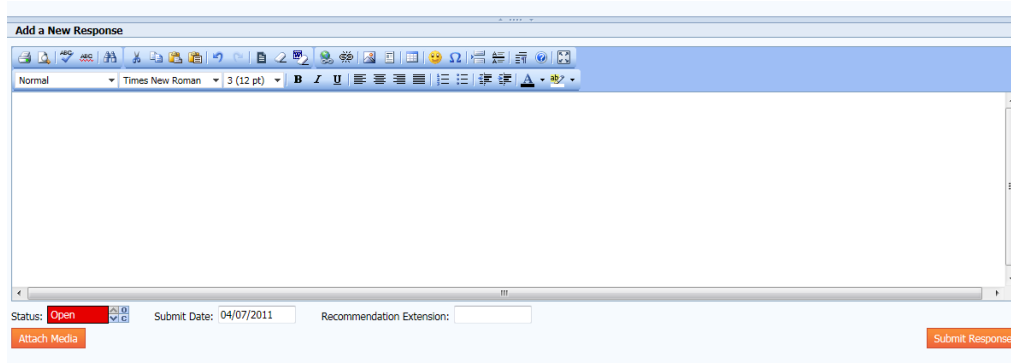


The main panel is divided into: Finding, Action, Responses and Add a New Response which allows all of the information relating to the action to be reviewed before a response is written. Again the size of these sections can be adjusted by dragging the dividers. Within the Finding and Action panels there are Status bars which show the percentage open / closed the finding / action is. It is possible that the bars will have different percentages if there is more than one action for a given finding.

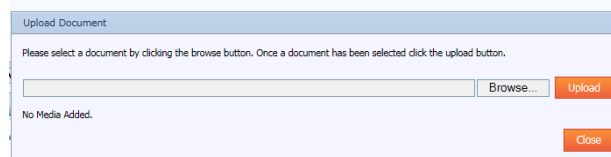
SMART Insight

The responses panel shows all responses from both sides and these are differentiated by the direction and colour of the arrow at the start of the response. A red arrow indicates the responsible party has responded while a green arrow indicates the action owner has responded.

The Add a New Response panel allows the response to be written and submitted to the system. The response field works in a similar manner to a word processor with the toolbar appearing above a multi-line text box. Clicking on the icon at the end of the first row of the toolbar opens a full screen text editor if the user wishes to make a longer response.



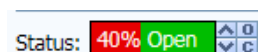
Below the text box are options to adjust the status of the action item (action owner only), attach media and submit the response. Attaching media to an action can be done by clicking either the Attach Media button below the text box or by clicking on the paper clip in the top toolbar.



Clicking either of these will open the popup window shown above. To attach media, simply click on the Browse button, select the desired media to upload and then click the Upload button. Once all necessary media has been uploaded, click the Close button to dismiss the window.



Action item owners will also have the option to adjust the status of the action item using the status control which can be set to fully open / closed using the O / C buttons, or incremented by ten percent margins using the up and down arrows. Below is an example of a status bar that has been incremented.






The final option available to action owners is the option to grant an extension to the action item and this can be achieved by changing the date in the Recommendation Extension field.

When the response has been finalised click either Submit Response or the save icon to confirm the response.

Appendix 1 – Troubleshooting

Problem / FAQ	Solution
Forgotten user login credentials.	Email support@smartglobalsolutions.com and a support representative will be able to retrieve your login details for you.
No actions data is present	This will mean that all actions are currently being followed up by the other party and no action is currently required by the user.

Appendix 2 – Icon Guide

Icon	Meaning
	Save
	Media (No attachment)
	Media (Attachment present)