SMART Basic Navigation

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This set of tip sheets focuses on the elements required for navigation and data entry.

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SMART Basic Navigation

**Menus/Toolbars**

1. **Menus:** The SMART Main Menu tree appears on the far left column of the screen. The first level menu items are left-most aligned and may include: Home, Agency, among others (depending on the user’s level of access).

2. **Sub-Menus:** Once the user has selected a First Level function, using the First Level Menu selection (i.e., Client List), the menu expands to display the Second Level Sub-Menus. The Sub-Menus allow the user to navigate to specific screens without having to use next and back keys. The Sub-Menus can be identified by a small triangle to the right of the label (pointing to the right). The triangle points down when the Sub-Menu is displayed. To choose a menu item, place your mouse over the item and single click the item.

3. **Toolbar Icons:**
   - The User Identity and Context Identify the User (individual logged into SMART), the Locations (Agency/Facility the user is logged into), and the client/participant’s record opened to be worked on.
   - The Generate Report icon allows the user to print a formatted record of the module being used.
   - **Logout** allows the user to log out of the application.
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**Navigation Buttons/Table Actions**

1. **Navigation Buttons:** The Go button is used to initiate a query (i.e., Clicking Go form the Client List screen will generate a list of clients at the agency).
   - **Cancel, Save, Finish, ← →** allows the user to move through a SMART module (i.e. Client Profile), where Cancel cancels your transaction and no work is saved; Save saves your work, but you remain on the same screen; Finish saves your work and returns you to the original screen; the left arrow takes you to the previous screen; and the right arrow advances you to the next screen in the module.

2. **Table Actions & Hyperlinks:** Table actions allows the user to create, edit or delete information.
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Controls

1. **Textbox**: Textboxes are designed to allow the user to manually enter data into SMART. Some text fields have specific formats which must be used for example.
   - DOB/Date of birth- mm/dd/yyyy
   - SSN: 345-78-0987
   - Phone Number: 301-405-4870

2. **Scrolling Textbox**: Scrolling textboxes are used to capture notes, comments, and descriptions. A scrolling textbox allows the user to enter at least 500 characters. Some boxes do not have any character limit.

3. **Dropdown Box**: A drop-down box is used where more than one entry may be selected from a list of values. Some may scroll.

4. **Mover Box**: A mover box is used where more than one entry may be selected from a list of values. Some may scroll.

Text boxes allow you to manually enter information.

The Mover Box has two arrows. The top arrow is used to move information from the left box to the right box after the selection has been made. The bottom arrow is used to move selected items from the left box to the right box.
1. **System Fields**: Dark yellow fields are system required fields and the record cannot be saved. The dark yellow fields must be completed in order to move from screen to screen.

2. **Reporting Fields**: A Light or pale yellow field represents data sets that are required to meet state and/or agency requirements.

3. **Incomplete System Required Fields**: Incomplete system (dark yellow) fields will generate a warning message, and will indicate which field is missing data by changing the field from dark yellow to peach.

4. **Incomplete State/Agency Required Fields**: Any information missing from a pale yellow field, will show up on the client/participant Activity List as ‘In Progress’ and on court reports as ‘Missing Data’.

![Image showing SMART Basic Navigation Conventions](image.png)
Basic Navigation

*Navigation Shortcuts*

1. **Tab Key (Keyboard):** moves the user from field to field.

2. **Control Key (Keyboard):** Holding down the control key while selecting multiple options in the mover boxes allows the user to select and move more than one option in a mover box.

3. **Shift Key (Keyboard):** Holding down the shift key while selecting options in a mover box will allow the user to choose multiple sequential options.

4. **Helpful Hints:** Moving your mouse over a field will generate additional information about the data collected for the field.

5. **Sort:** a user can sort list items, such as those on the Activity List or Episode List by clicking on the column header. For example if the user clicks on the Date column on the Activity List, it will sort the list of activities by date.