



CHAPTER 2: LAUNCHING SMART FACTS

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CHAPTER 2: Launching SMART FACTS

Chapter 2 provides SMART FACTS “housekeeping” information. To successfully access the SMART FACTS web-site and use all of its features, you will need to ensure the compatibility of your computer and its settings, have a username and password, maintain accurate SMP contact information, allow pop-ups, and download a reports viewing software called *Crystal Reports*. To ensure confidentiality, you will also need to log off the SMART FACTS web-site when you finish your work.

Computer Compatibility

SMART FACTS can be launched from any computer that meets ALL of these requirements:

- ◆ Has an Internet connection.
- ◆ Has the *Internet Explorer* browser, version 6.0 or higher (SMART FACTS may not be compatible with other browsers, such as *Firefox*).
- ◆ Is NOT a Macintosh. If you ONLY have access to a Macintosh computer, contact *Social Solutions* technical support (see chapter 1) to see if accommodations can be made.

The first time you use SMART FACTS from a given computer, you will need to complete the following when prompted:

- ◆ Allow “pop-ups” from the SMART FACTS site.
- ◆ Run Active X Controls in order to view all necessary screens. The process is usually simple and can be completed by following the on-line prompts.
- ◆ Conduct a one-time download of “crystal reports” viewing software. Again, follow the on-line prompts. If you have trouble, your agency may have security rules that will require you to get clearance from your IT department before downloading this software.
- ◆ If you have problems with pop-ups, Active X Controls, or Crystal Reports viewer, you can access *Social Solutions* on-line guidance by clicking on *Support* from the bottom right corner of your screen (you must already be logged on to SMART FACTS to access this link). OR, you can refer to the “Troubleshooting Crystal Reports” document in the Appendix of this manual. OR, you can contact *Social Solutions* directly by phone or e-mail (see Chapter 1).

Logging On

1. Use this internet address to reach the log on page: www.smartfacts.org
2. Enter your Username and Password (If you don't have one, see "NOTE" box below).



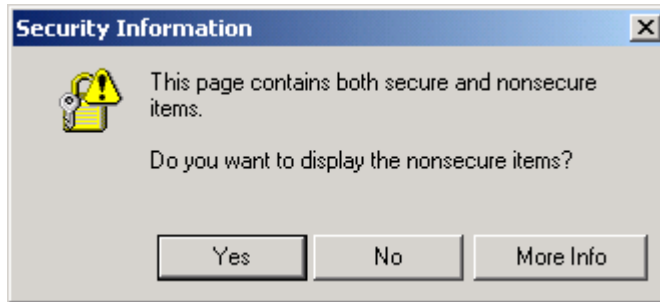
It's OK that the browser address changes when you reach the log in page.

You **ARE** in SMART FACTS.

NOTE: Each SMP Director/Coordinator is a site administrator and should provide other SMP staff with usernames and passwords. SMP staff Site administrators can also restrict access to certain SMART FACTS features, such as reports, for example. If you are a new SMP Director/Coordinator and don't know your username or password, contact *Social Solutions* (see chapter 1).

3. Choose your SMP location from the **Select Your Site** drop down menu. To access the drop down menu (and all drop down menus within SMART FACTS), click on the triangular arrow on the right side of the data entry field.

- Once your site is selected, click on the green arrow beside **Go**.
- If this box appears next, click on **Yes**.



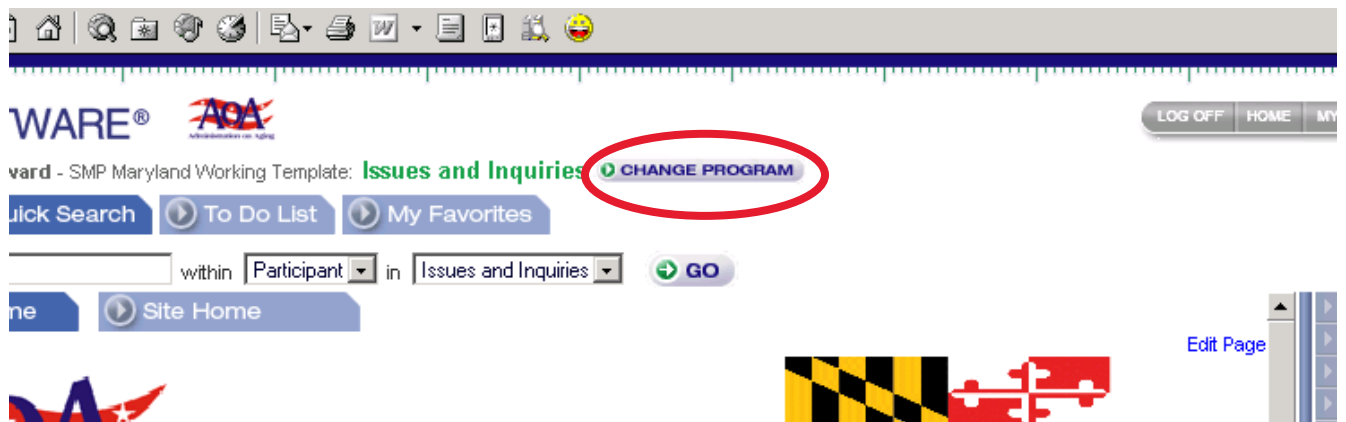
Selecting a Program

You must select the appropriate Program from the **Change Program** list of choices before you begin your work. There are three choices:

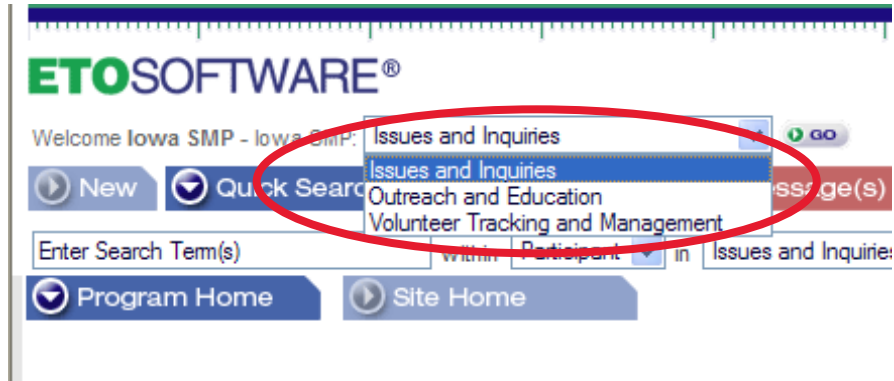
- **Issues and Inquiries**
- **Outreach and Education**
- **Volunteer Tracking and Management**

To Change the program:

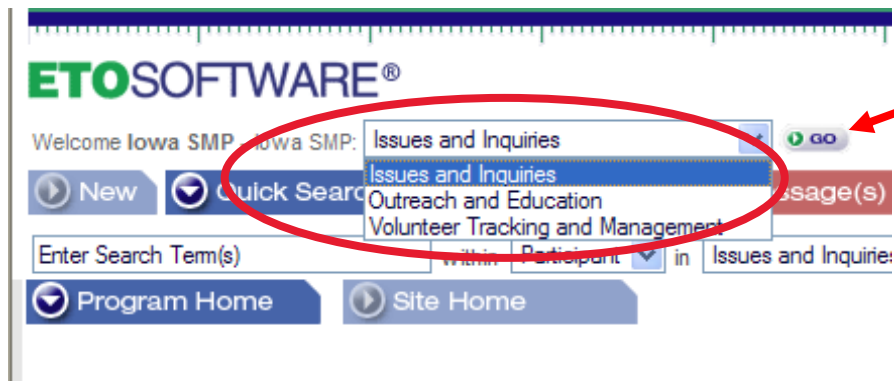
- Begin by clicking on the **Change Program** button (circled).



2. Select either **Issues and Inquiries**, **Outreach and Education**, or **Volunteer Tracking and Management** from the list. The subsequent chapters of this manual explain these programs in detail.



3. When you have made your selection, it will be highlighted in blue (*Issues and Inquiries* in the example below). Click on **Go**.

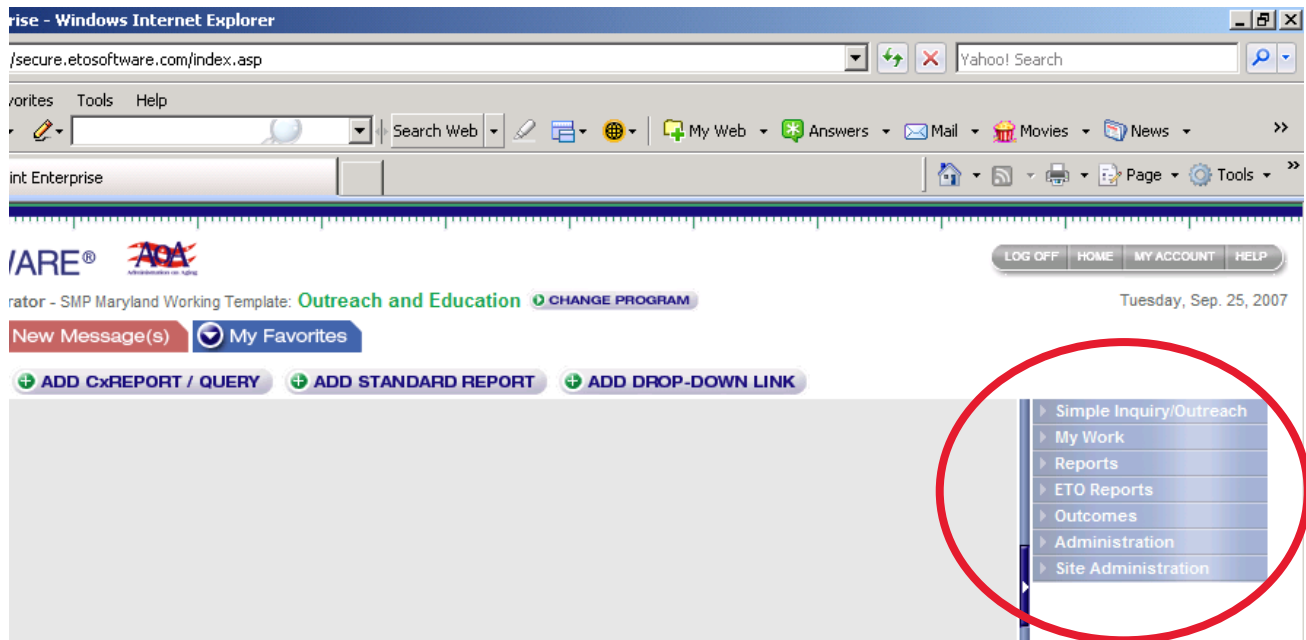


Updating SMP Contact Information

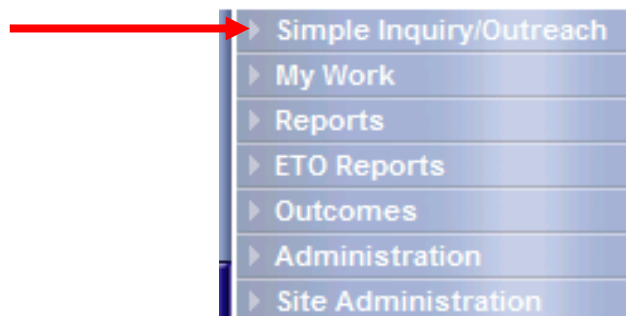
IT IS VERY IMPORTANT to enter the contact information for your SMP into SMART FACTS. This information populates letters, forms, and reports throughout the system. The instructions below explain how to update and enter your SMP contact information. It is also very important that each SMP have ONLY ONE SMP Contact Information entry within SMART FACTS. Usually SMP Contact Information will have already been entered in SMART FACTS and will simply need to be updated periodically.

1. Make sure you are in the **Outreach and Education** Program of SMART FACTS.
2. If you are not, click on **Change Program**.

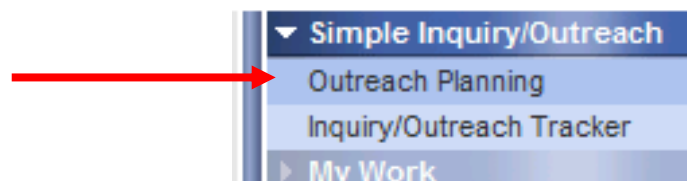
3. Select **Outreach and Education**.
4. On the right side of the page is a menu of options which will be referred to throughout this manual as the **navigation bar** (circled below).



5. Select **Simple Inquiry/Outreach** from the navigation bar.



6. Select the **Outreach Planning** sub-topic.



7. The following screen will appear.

In the example below, the **SMP Contact Info** has already been entered. This is evident because a name and date appears in the **"Date Completed (staff)"** column.

To make changes, click on **Update**.



If no SMP Contact Info appears, skip to the *Entering New SMP Contact Info* section later in this chapter.

Assessment Name	Assessment Identifier	Date Completed (staff)	REVIEW	UPDATE	REPORT	PRINT	DELETE
1. SMP Contact Info	--	11/30/2006 (Maisie Howard)	REVIEW	UPDATE	REPORT	PRINT	DELETE
2. Statewide Outreach Plan	--	12/21/2006 (Maisie Howard)	REVIEW	UPDATE	REPORT	PRINT	DELETE

8. The following screen will appear. Make changes as needed to your SMP contact information in the fields provided. Notice that the name requested is the name of the person who is primarily responsible for managing complex issues (complaints).

SMP Contact Info

Section A.

A-1. SMP Contact Person (Responsible for Complaints Management):

A-2. SMP Organization:

A-3. SMP Site Name (e.g. Iowa SMP):

A-4. Address:

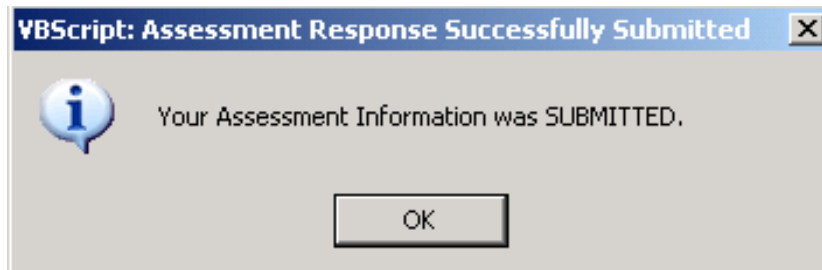
A-5. Apt/Suite Number:

A-6. City:

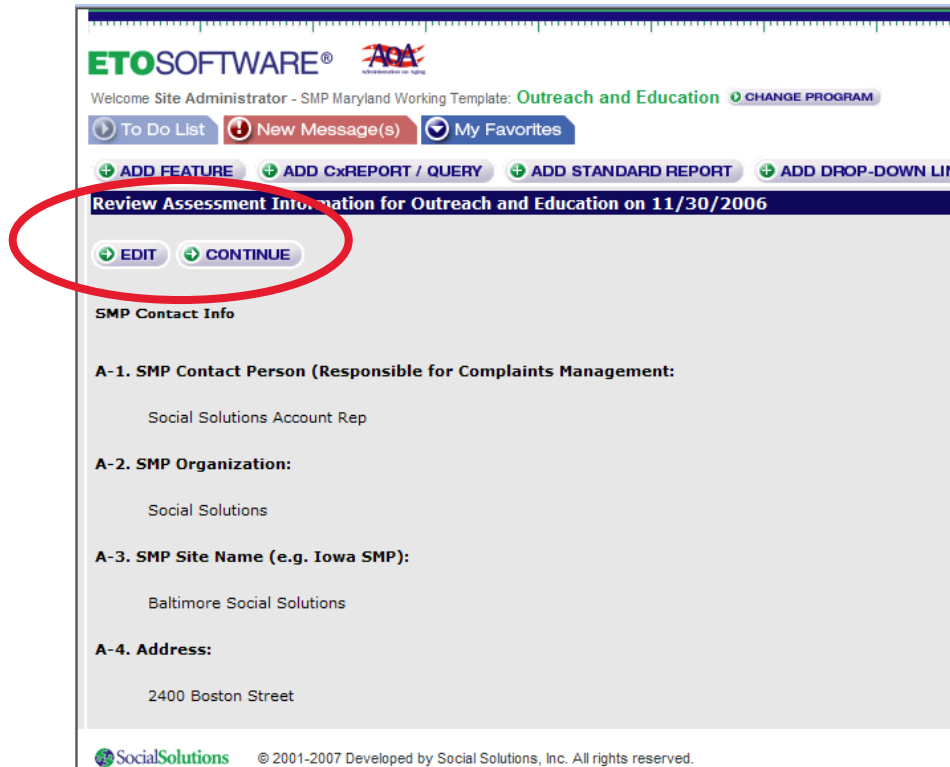
- Use the Scroll Bar to access remaining fields and continue updating SMP contact information.

- When you are done, click on **Submit** (NOT *Save Draft*).

- The following message will appear. Click on **OK**.



12. You will be given a chance to review your work by reading the summary that appears. You can also select **Edit** or **Continue**.



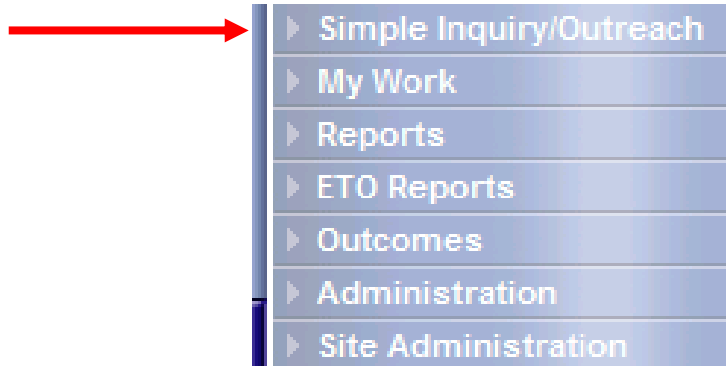
- A. Choosing **Edit** will take you back to step #7 on the previous page.
- B. Choosing **Continue** will take you back to the screen shown in step #6.
- C. If you are satisfied with your data entry, continue to other areas of SMART FACTS or log off.

Entering New SMP Contact Information

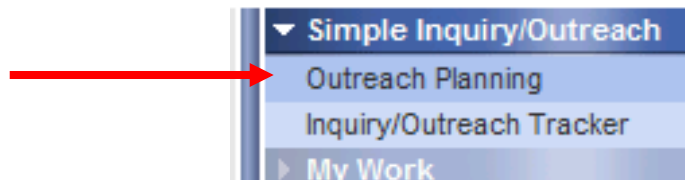
SMP Contact Information is used to populate letters in SMART FACTS, such as the Complex Issues referral cover letter. Remember also that only ONE entry can be made. It is not necessary to have all SMP staff or branch offices entered into this area of SMART FACTS. If SMP Contact Information has never been entered into SMART FACTS, do the following:

1. Make sure you are in the **Outreach and Education** Program of SMART FACTS.
2. If you are not, click on **Change Program**.
3. Select **Outreach and Education**.

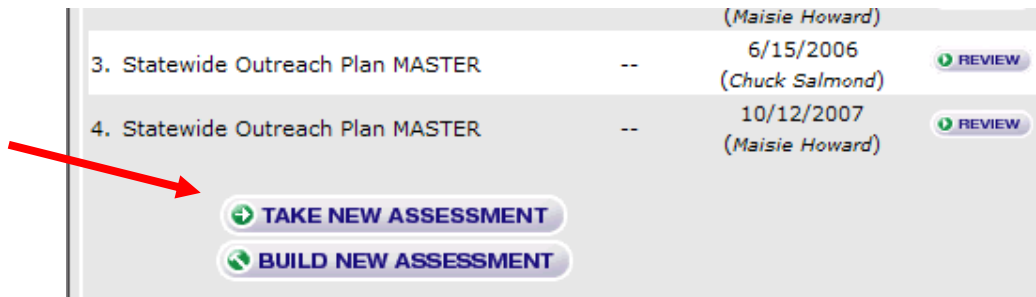
4. From the right side navigation bar, select **Simple Inquiry/Outreach**.



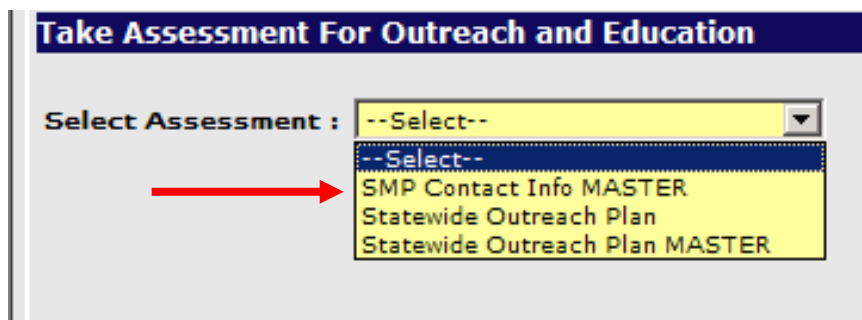
5. Select the **Outreach Planning** sub-topic.



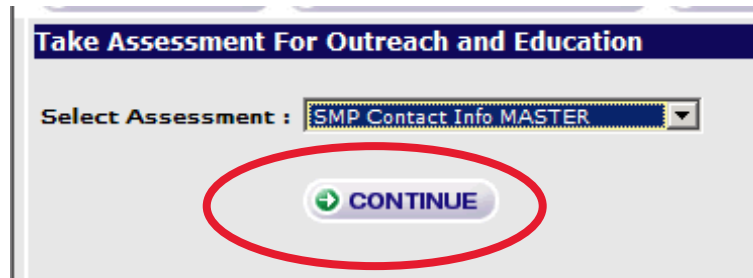
6. Click on **Take New Assessment**.



7. Select **SMP Contact Info MASTER**.



8. Click on **Continue**

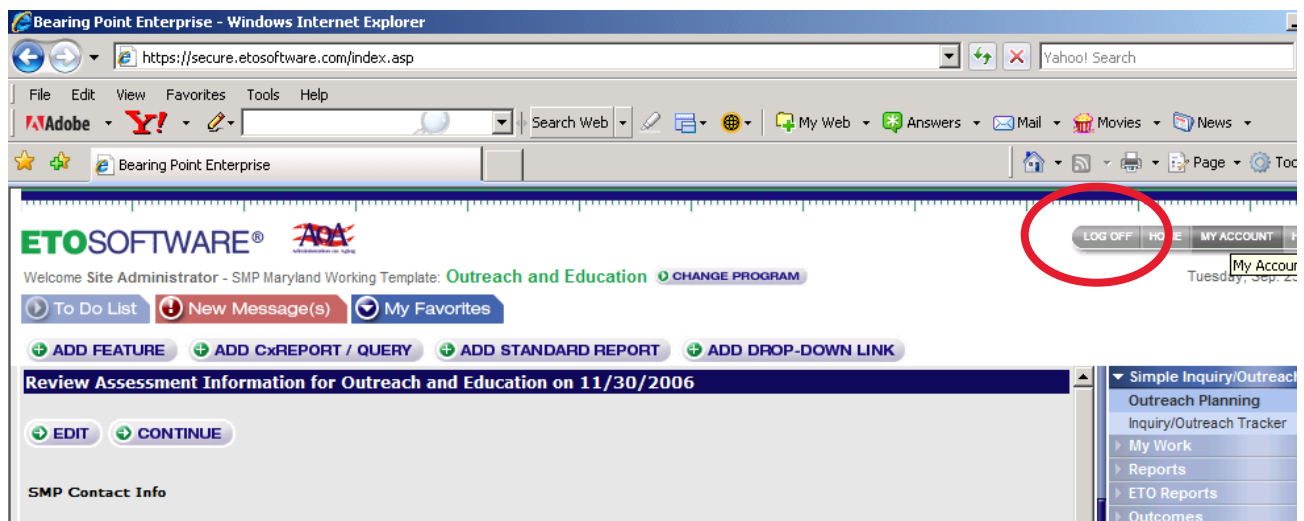


9. Complete the necessary fields as explained in the *Updating SMP Contact Information* section of this chapter.

Logging Off SMART FACTS

When you are through with your work, remember to **Log Off** the system. This protects the confidentiality of your data and reduces the burden on the software. The **Log Off** button is available from nearly every screen in SMART FACTS. It is not available when reports are open; if that is the case, you must first close the report to log off SMART FACTS.

1. Click on **Log Off** in the upper right corner of the screen.



2. A dialogue box will appear, giving you a chance to change your mind.
3. Click on **OK** to log off.