Brief Session on

School Maintenance Automated Rapport Terminal (SMART) System

22 September 2014

23 September 2014

25 September 2014

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1 SYSTEM OVERVIEW

1.1 FEATURES HIGHLIGHTS

The following is the general main functionality features of SMART system.

As to improve the collaboration and automation of business processes related to major repairs (MR) and emergency repairs (ER) handled by various EDB sections and schools, the implementation of School Maintenance Automated Rapport Terminal (SMART) system has been initiated. Areas of improvements as well as demands and challenges brought by the SMART system have been identified and categorized into the following items:

- Handling MR and ER requests from school users
- Request handling and approval
- Security control
- System administration
- Operation expenses
- (a) Business Impact to School Users

Improvements	Submission of MR and ER applications by schools can be done online.	
	• Approval to the applications of schools can be performed online.	
	• School users can check the latest status online instead of through telecommunication with REO. (ref. section 2.3 of this manual)	
•	• Automation of the business processes eliminates manual efforts as well as paper usage during transmission, thus, increasing efficiency and being environmentally friendly respectively.	

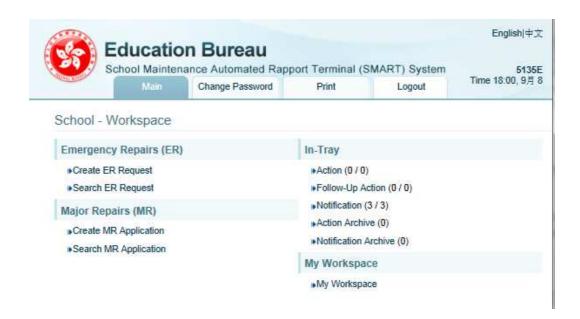
1.2 GENERAL OPERATION STEPS USING WITH SMART

(a) Accessing SMART system via common browsers Below is the URL for accessing SMART: http://smartschool.edb.gov.hk/

For required SMART system login account, school users will receive the required login information by mails from SPM Section to the school; User can follow up with the SMART support email account (Email: smartsupport@edb.gov.hk) or SMART support hotline (3163 0040).

(b) Common functions/features in SMART – System Menu

Different functions assigned to different SMART system users :



After user login the system will re-direct user to system main menu, and user can find the assigned SMART functions under different sub menus in the left hand side of the main menu, e.g. Search ER Request, etc. User can click on these functions for performing required operation.

There are 2 submenus arranged in right hand side of the main menu, which are In-Tray and My Workspace :

For In-Tray:

i.) Action

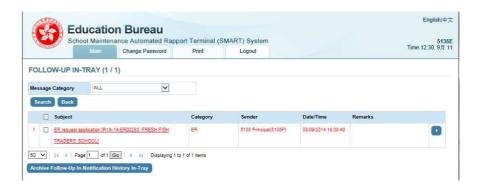


The ACTION IN-TRAY showing work flow actions sent to the user from previous action actor, user is required to click into action to follow up / response the action in order to complete the task in the work flow.

For the numbers (in blanket) beside ACTION IN-TRAY, it indicating the total numbers of actions in the right, while total number of unread actions in the left, e.g. if showing (2 / 3), it indicating total 3 outstanding actions need user to follow up and there are 2 new actions that user has not yet read.

After response to action, the corresponding actions will be deleted from this in-tray and moved to another tray - Action Archive (refer to below)

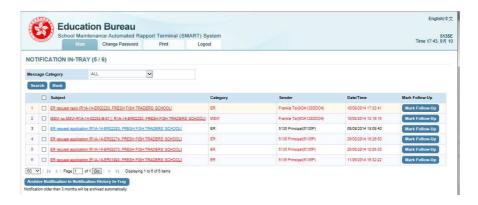
ii.) Follow-Up



This tray storing notifications ever sent to user (these notifications were sent to user via NOTIFICATION IN-TRAY) and user find follow up action required for these notification, refer to below for Notification.

User can archive the follow-up notification(s) (press [Archive Follow-up In Notification History In-Tray] button) and they will be moved to another tray – Notification Archive.

iii.) Notification

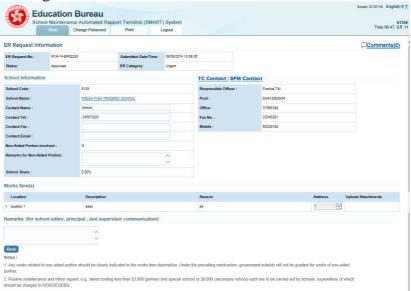


For some operations / processes, notification message will be sent to related users,

e.g. above is screen capture of Notification In-Tray for school editor:

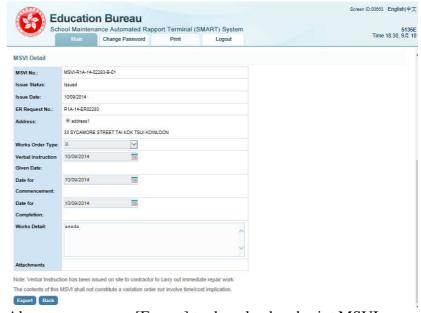
1.) The 3rd notification record was sent to school editor to notify ER request application being sent to TC by school Principal (for school code 5135), for ER request application R1A-14-ER02283

User can read the submitted ER request information by clicking on the notification :



2.) The 2nd notification record sent to school users to notify MSVI created for ER request

School user can read the issued *Maintenance Surveyor's Verbal Instruction* (MSVI) information by clicking on the notification:



Also user can press [Export] to download and print MSVI:



As there might be many notifications, user can select some notification (Press [Mark Follow-Up] button) which need to follow up later, save a copy (move) to another tray - Follow-Up Action.

Or if nothing need to follow up, user can archive the notification (press [Archive Notification In Notification History In-Tray] button) and they will be moved to another tray – Notification Archive.

For the numbers (in blanket) beside NOTIFICATION IN-TRAY, it indicating the total numbers of notifications in the right, while total number of unread notifications in the left, e.g. if showing (5 / 6), it indicating total 6 notifications in this tray, and there is 5 new notification user not yet read.

iv.) Action Archive

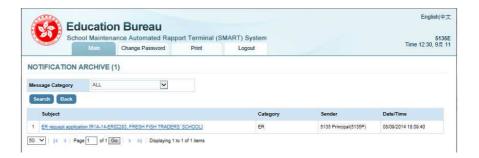


This tray storing actions ever follow up (these actions were sent to user to follow up via ACTION IN-TRAY).

User can check the action history via this tray.

The number (in blanket) beside Action Archive, e.g. (4) indicating the total number of actions history keeping in this archive.

v.) Notification Archive



This tray storing notifications ever sent to user (these notifications were sent to user via NOTIFICATION IN-TRAY).

User can check the notification history via this tray.

For My Workspace:

i.) My Workspace

For keeping user work in progress (draft), current system will save draft in My Workspace for below processes :

- ER request
- MR Application

The system will save the draft in My Workspace when user press [Save as Draft] button (if any) or user leaving the page during editing.

For example of the case, refer to section <u>Prepare ER Request by School Editor</u> and section <u>Prepare MR Application by School Editor</u>.

(c) Common functions/features in SMART – Login session and timeout

Setup of timeout is a government general requirement for government IT systems. For SMART, after user login, and if remain idle, the system will count down timeout for a period of 2 hours,

When reaching 5 minutes before timeout, SMART system will pop up a message - "The session will timeout in 5 minutes, do you continue working?", to alert user, user can choose either below response action for the message:

- i.) OK
 The timeout counter will be reset
- ii.) Cancel
 Session will be timeout immediately, user need to login again in order to access SMART.

When reaching timeout without response from user, Session will be timeout immediately, user need to login again in order to access SMART.

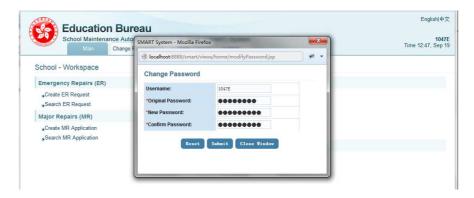
(d) Change Password

User can change password as shown as the following steps:

i.) After login SMART, click Change Password tab

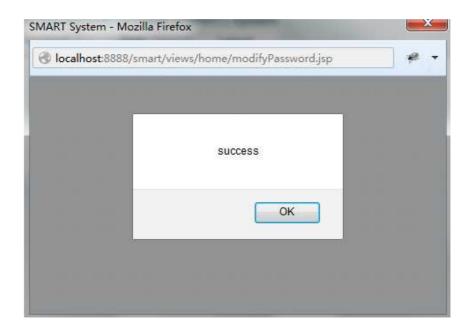


ii.) System will pop up the Change Password window



User should input the Original Password, and then input the New Password and retype the new password in Confirm Password to double confirm.

iii.) Press [Submit] to proceed the change of password



If system prompts "success" message, this indicates password changed successfully.

1.3 FUNCTIONS ASSIGNED TO USERS IN SMART

There are controls in system which control the access of functions by different users. The following is major main menu for school user group: For usage of functions, refer to section System Operation.

(a) For User Group: SCHOOL – Editor, Principal, Supervisor e.g. 5135E, 5135P, 5135S

4 major functions available to School Users are:

Create ER Request Search ER Request Create MR Application Search MR Application

There are school editor, school principal, and school supervisor user roles for each school, granted with similar set of functions.



2 TRAINING MATERIAL – SYSTEM OPERATION

Below are details of system operations. When there are related operations/functions (e.g. precedence functions/flow), they will be stated in the corresponding individual functions.

2.1 SCHOOL FUNCTION – ER REQUEST

SMART system provides an online web form for School to create ER Request

2.1.1 Prepare ER Request by School Editor

- i.) Login as **School Editor**
- ii.) On main menu, click on Create ER Request
- iii.) Input at least all fields with asterisk*
- iv.) If a repair work involves non-aided portion, please select **Non-Aided Portion Involved**. By selecting this option, it indicates school shall bear the part of repair cost.
- v.) Press icon to add any works items which require repair. You can specify multiple repair work in a single ER Request.

For each works item, user should at least provide below information:

- Location
- Description
- Reason
- Address

If more than 1 address, user should select the correct address indicator for the works item.

Please Note: for each ER request, user should include items for 1 address only.

- vi.) Press icon to remove any works items.
- vii.) Please upload any image (JPEG) / PDF of the damage items. The file size of each image (JPEG) / PDF shall not be larger than 10MB.

And, please note:

- For each works item, SMART limits school user to upload NOT more than 3 image files
 - Error message "Sorry! The largest number to upload for every item is 3!" will be pop up if user trying to press to upload more than 3 image files;
- If user have to upload more than 3 images, work around is that user can include the images in a PDF file for upload
- viii.) Press [Next] to go to confirmation page.

Please note:

- After user clicks [Next] but not going to click [Confirm] to submit the ER request, the system will automatically save the editing draft ER request to My Workspace when user leaving the page during editing.
- But if user leave the editing page before clicking [Next], the editing draft ER request will NOT be saved.
- ix.) Press [Confirm].
- x.) Press [Ok] to proceed.
- xi.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. ER Request shall be sent to **School Principal** for review.

Example:

- *i.*) Login as **5057E**
- ii.) On main menu, click on Create ER Request
- iii.) Input at least all fields with asterisk*

 Please note that SMART system supports Chinese characters for most text fields, e.g. Item Location, Description, Reason, Remarks.
- iv.) If a repair work involves non-aided portion, please select Non-Aided Portion Involved. By selecting this option, it indicates school shall bear the part of repair cost.
- v.) Press icon to add any works items which require repair. You can specify multiple repair work in a single ER Request.

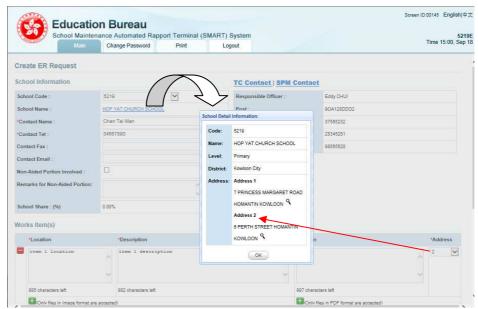
For each works item, user should at least provide below information:

- Location
- Description
- Reason
- Address

If more than 1 address, user should select the correct address indicator for the works item;

Important note: for each ER request, user should include items for 1 address only.

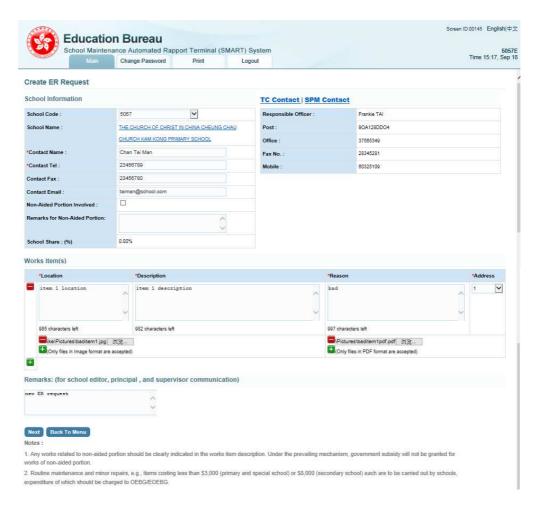
e.g.



User can find the corresponding address for an address indicator via link at School Name as shown at above.

- vi.) Press icon to remove any works items.
- vii.) Please upload any image (JPEG) / PDF of the work items. The file size of each image (JPEG) / PDF shall not be larger than 10MB.

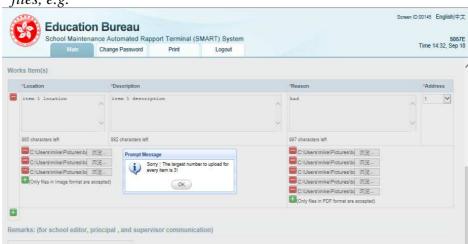
 User can upload in image format (JPEG) or PDF format for the works item.



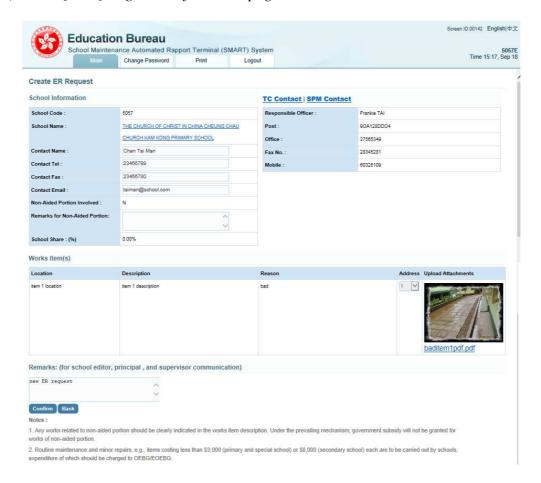
And, please note:

- for each works item, SMART limits school user to upload NOT more than 3 image files

Error message "Sorry! The largest number to upload for every item is 3!" will be pop up if user trying to press to upload more than 3 image files, e.g.



- If user have to upload more than 3 images, work around is that user can include the images in a PDF file for upload

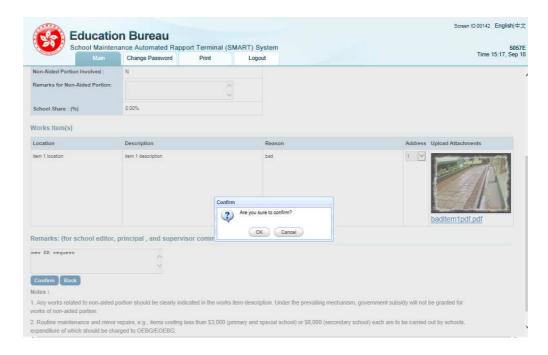


viii.) Press [Next] to go to confirmation page.

Please note:

- after user clicks [Next] but not going to click [Confirm] to submit the ER request, the system will automatically save the editing draft ER request to My Workspace when user leaving the page during editing.
- But if user leave the editing page before clicking [Next], the editing draft ER request will NOT be saved.

ix.) Press [Confirm].



- x.) Press [Ok] to proceed.
- xi.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok].

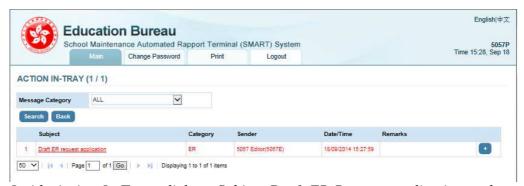
Then the request action will be sent to School Principal for review, refer to section <u>Submit ER Request by School Principal</u>.

2.1.2 Submit ER Request by School Principal

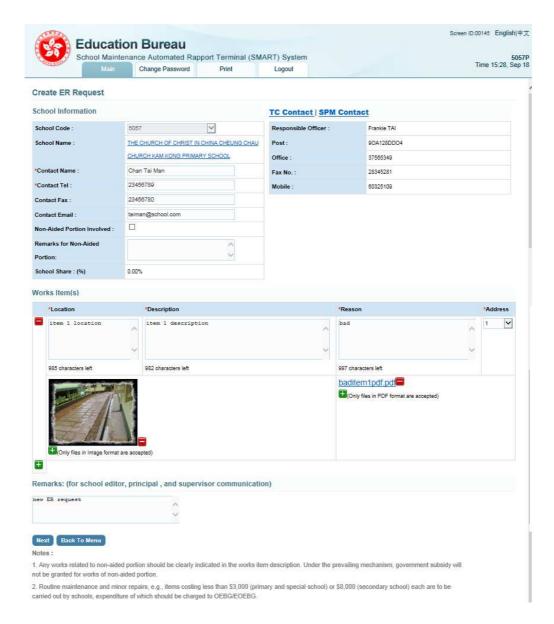
- i.) Login as **School Principal**
- ii.) On main menu, click on <u>Action</u> and go to **Action In-Tray**. (There are 2 numbers (in blanket) next to <u>Action</u>. i.e. (1/10) indicates, there are 10 tasks awaiting for your action. And out of 10 only, 1 of them is unread.)
- iii.) Inside **Action In-Tray**, click on Subject <u>Draft ER Request application</u> and go to ER Request detail. You can also see **Sender** and **Submitted Date/Time** of this particular ER Request.
- iv.) Inside the ER Request detail page, you shall read the information inputted by School Editor. School **Principal** can add/edit/remove any information if needed.
- v.) Press [Next] to go to confirmation page.
- vi.) Press [Confirm] to submit the ER Request for further process. Or Press [Reject] to return the ER Request to School Editor for amendment. For rejection case, **School Editor** shall receive a notification. And he/she shall found the rejected ER Request at My Workspace.
- vii.) Press [Ok] to proceed.
- viii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. ER Request shall be sent to district duty officer (term consultant) for further actions.

Example:

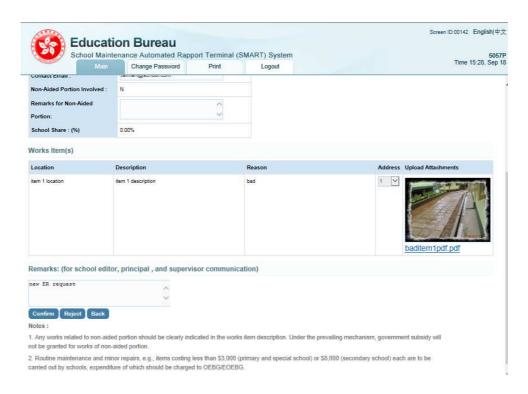
- *i.*) Login as **5057P**
- ii.) On main menu, click on Action and go to Action In-Tray. (There are 2 numbers (in blanket) next to Action. i.e. (1/10) indicates, there are 10 tasks awaiting for your action. And out of 10, only 1 of them is unread.)



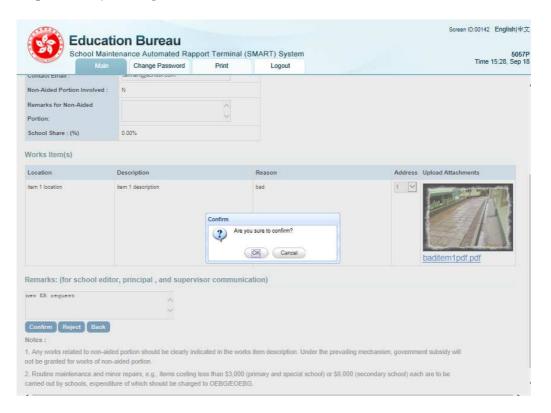
- iii.) Inside Action In-Tray, click on Subject Draft ER Request application and go to ER Request detail. You can also see Sender and Submitted Date/Time of this particular ER Request.
- iv.) Inside the ER Request detail page, you shall read the information inputted by School Editor. School **Principal** can add/edit/remove any information if needed.



v.) Press [Next] to go to confirmation page.

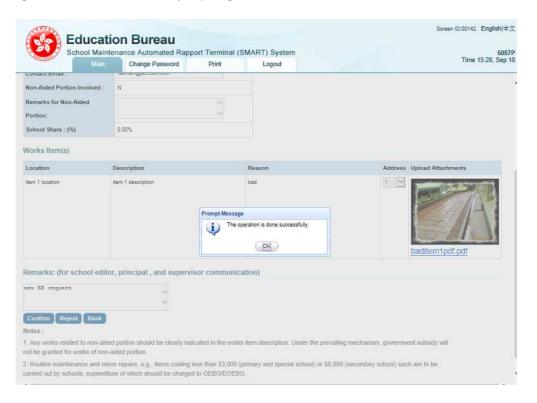


vi.) Press [Confirm] to submit the ER Request for EDB process. Or Press [Reject] to return the ER Request to School Editor for amendment. For rejection case, School Editor shall receive a notification. And he/she shall find the rejected ER Request at My Workspace.



vii.) Press [Ok] to proceed.

viii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok].



Then the request action will be forwarded to district duty officer (term consultant) for further processing.

2.2 SCHOOL FUNCTION – MR APPLICATION

SMART system provides an online web form for School to create MR Application. Only aided school shall submit MR Application via SMART system.

School unable to submit MR Application, if

- MR Application has already been submitted in the current MR Cycle. Each school is allowed to submit 1 MR Application per MR Cycle.
- MR Application period has not yet begun. School will be invited to submit the
 applications on annual basis and you may consult your SSDO if deemed
 necessary.
- MR Application period has passed.

2.2.1 Prepare MR Application by School Editor

- i.) Login as School Editor
- ii.) On main menu, click on Create MR Application
- iii.) Input at least all fields with asterisk*
- iv.) If a repair work involves non-aided portion, please select **Non-Aided Portion Involved**. By selecting this option, it indicates school shall bear the part of repair cost.
- v.) Press icon to add any works items which require repair. You can specify multiple repair work in a single MR Application.

For each works item, user should at least provide below information:

- Location
- Description
- Reason
- Address

If more than 1 address, user should select the correct address indicator for the works item.

- vi.) Press icon to remove any works items.
- vii.) Please upload any image (JPEG)/PDF of the work items. The file size of each image (JPEG)/PDF shall not be larger than 10MB.

And, please note:

- For each works item, SMART limits school user to upload NOT more than 3 image files
 - Error message "Sorry! The largest number to upload for every item is 3!" will be pop up if user trying to press to upload more than 3 image files;
- If user have to upload more than 3 images, work around is that user can include the images in a PDF file for upload

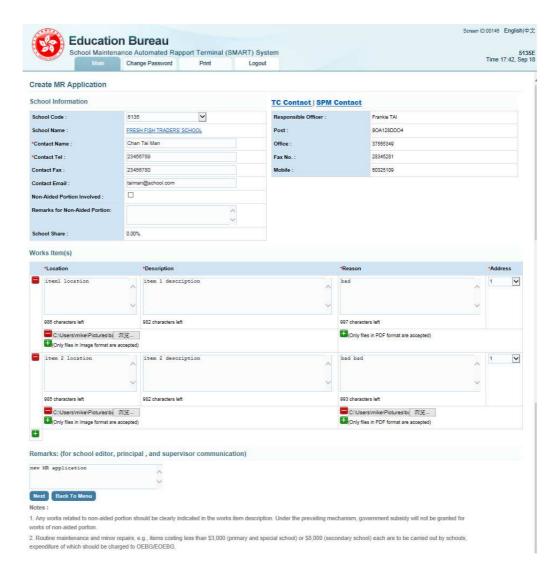
viii.) Press [Next] to go to confirmation page.

Please note:

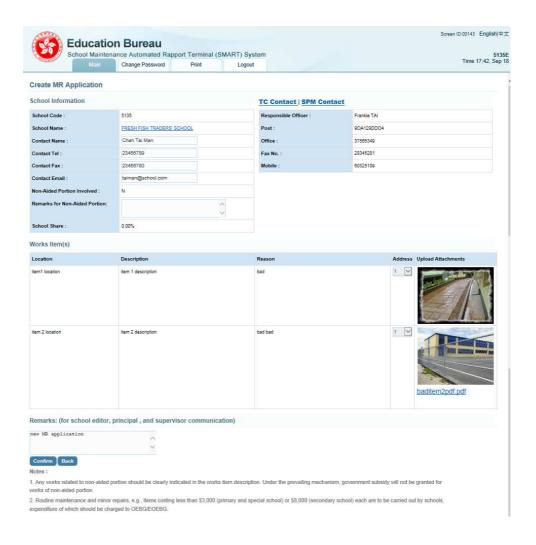
- After user clicks [Next] but not going to click [Confirm] to submit the MR application, the system will automatically save the editing draft MR application to My Workspace when user leaving the page during editing.
- But if user leaves the editing page before clicking [Next], the editing draft MR application will NOT be saved.
- ix.) Press [Confirm].
- x.) Press [Ok] to proceed.
- xi.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. MR Application shall be sent to **School Principal** for approval.

Example:

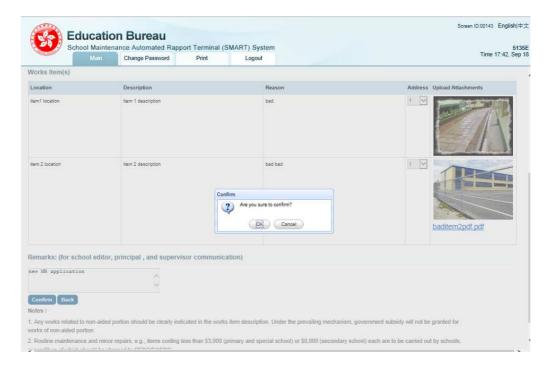
- *i.*) Login as **5135E**
- ii.) On main menu, click on Create MR Application
- iii.) Input at least all fields with asterisk*
 Please note user can input Chinese to text fields, e.g. Item Location, Description, Reason, Remarks.
- iv.) If a repair work involves non-aided portion, please select Non-Aided Portion Involved. By selecting this option, it indicates school shall bear the part of repair cost.
- v.) Press icon to add any works items which require repair. You can specify multiple repair work in a single MR Application.
- vi.) Press icon to remove any works items.
- vii.) Please upload any image (JPEG) / PDF of the work items. The file size of each image (JPEG) / PDF shall not be larger than 10MB.



viii.) Press [Next] to go to confirmation page.



ix.) Press [Confirm].



x.) Press [Ok] to proceed.



xi.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok].

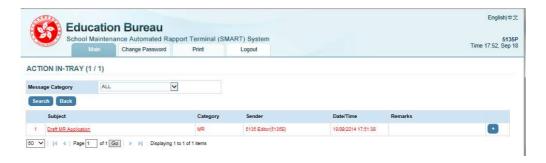
Then an action will be sent to School Principal for approval, refer to section <u>Approve</u> MR Application by School Principal.

2.2.2 Approve MR Application by School Principal

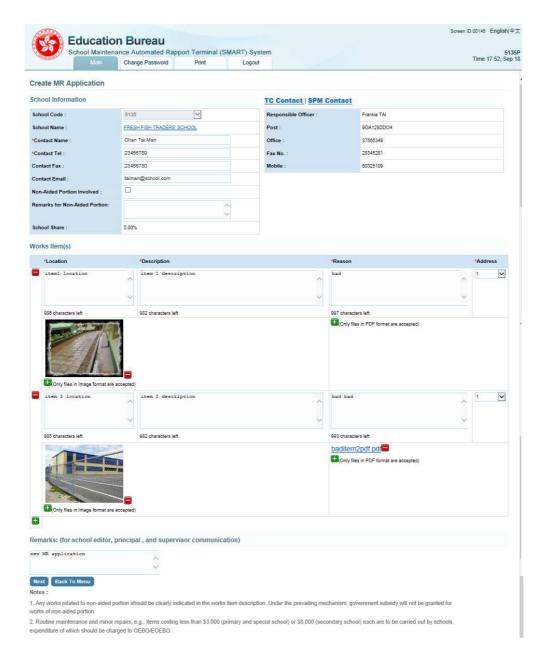
- i.) Login as **School Principal**
- ii.) On main menu, click on Action and go to Action In-Tray.
- iii.) Inside **Action In-Tray**, click on Subject <u>Draft MR Application</u> and go to MR Application detail.
- iv.) Inside the MR Application detail page, you shall read the information inputted by School Editor. School **Principal** can add/edit/remove any information if needed.
- v.) Press [Next] to go to confirmation page.
- vi.) Press [Confirm] to submit the MR Application to **School Supervisor** for review. Or Press [Reject] to return the MR Application to School Editor for amendment.
- vii.) A message prompted "Are you sure to confirm?", Press [Ok] to confirm and proceed.
- viii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. MR Application shall be sent to **School Supervisor** for review.

Example:

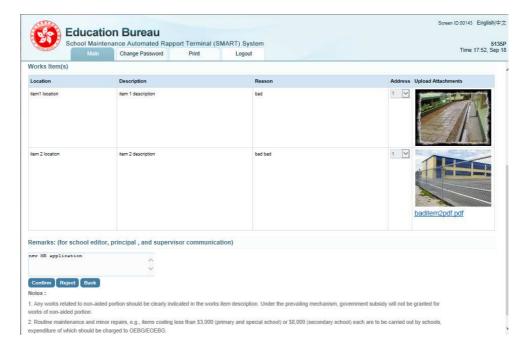
- *i.)* Login as **5135P**
- ii.) On main menu, click on Action and go to Action In-Tray.



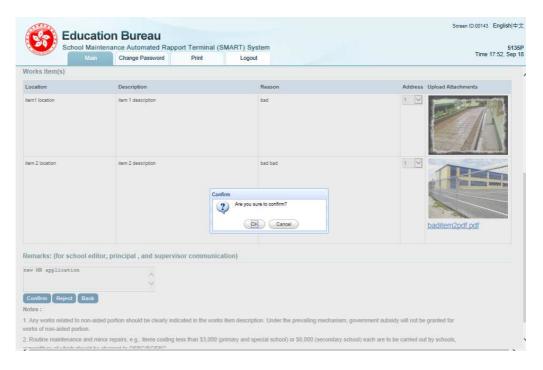
- iii.) Inside Action In-Tray, click on Subject <u>Draft MR Application</u> and go to MR Application detail.
- iv.) Inside the MR Application detail page, you shall read the information inputted by School Editor. School **Principal** can add/edit/remove any information if needed.



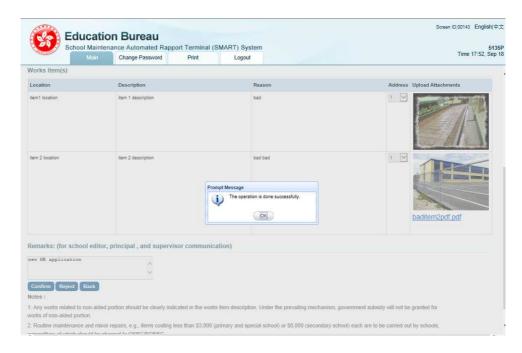
v.) Press [Next] to go to confirmation page.



vi.) Press [Confirm] to submit the MR Application to **School Supervisor** for review. Or Press [Reject] to return the MR Application to School Editor for amendment.



vii.) A message prompted "Are you sure to confirm?", Press [Ok] to confirm and proceed.



viii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. MR Application shall be sent to School Supervisor for review.

Then an Action message will be sent to School Supervisor for review, refer to section <u>Submit MR Application by School Supervisor</u>.

2.2.3 Submit MR Application by School Supervisor

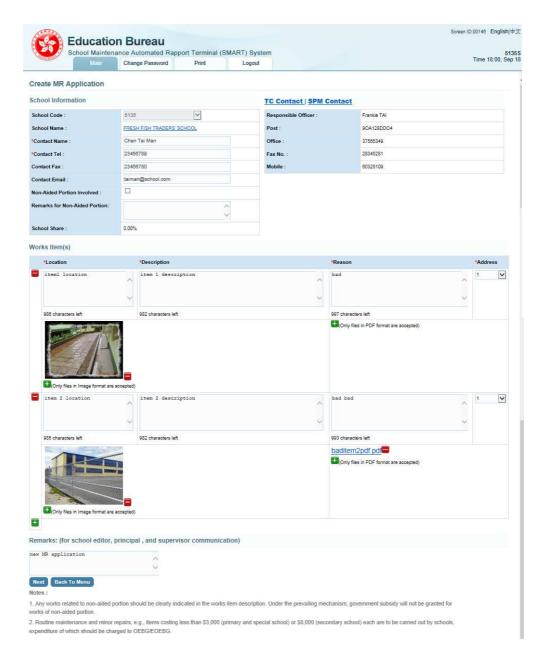
- i.) Login as School Supervisor
- ii.) On main menu, click on Action and go to Action In-Tray.
- iii.) Inside **Action In-Tray**, click on Subject <u>Draft MR Application</u> and go to MR Application detail.
- iv.) Inside the MR Application detail page, you shall read the information submitted from School **Principal**. School Supervisor can add/edit/remove any information if needed.
- v.) Press [Next] to go to confirmation page.
- vi.) Press [Confirm] to submit the MR Application for EDB process. Or Press [Reject] to return the MR Application to School **Principal** for amendment. For rejection case, **School Principal** shall receive an Action. And he/she shall found the rejected MR Application at <u>Action In-Tray</u>.
- vii.) A message prompted "Are you sure to confirm?", press [Ok] to confirm and proceed.
- viii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok]. MR Application action will be sent to EDB(SSDO) for further processing.

Example:

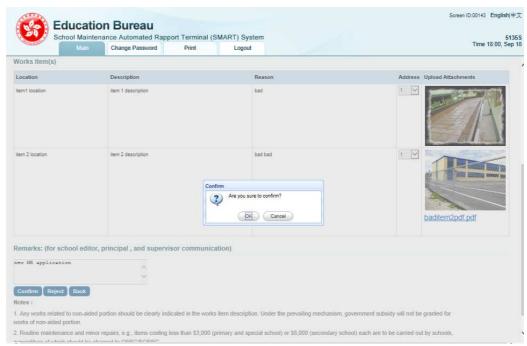
- *i.*) Login as **5135S**
- ii.) On main menu, click on Action and go to Action In-Tray.Refer to previous step in section <u>Approve MR Application by School Principal</u>.



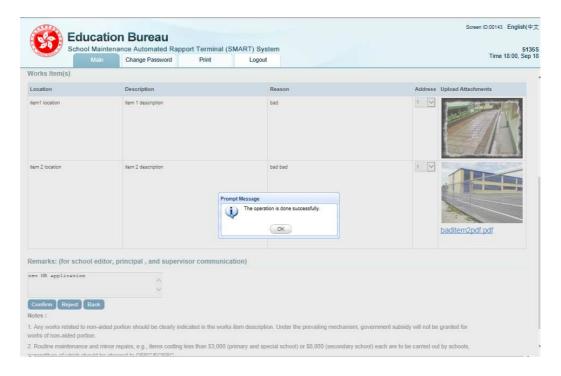
iii.) Click into the action which will be forwarded to Create MR Application page.



- iv.) Press [Next] to go to confirmation page.
- v.) Press [Confirm] to submit the MR Application for EDB process. Or Press [Reject] to return the MR Application to School **Principal** for amendment. For rejection case, **School Principal** shall receive an Action. And he/she shall found the rejected MR Application at <u>Action In-Tray</u>.



vi.) A message prompted "Are you sure to confirm?", press [Ok] to confirm and proceed.



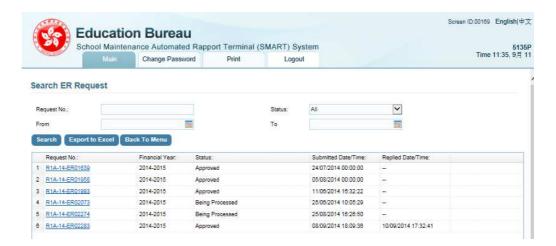
vii.) If the process is successfully completed, the system will prompt message "The operation is done successfully.", press [Ok].

Then the MR Application action will be sent to EDB (SSDO) for further process.

2.3 SEARCH FUNCTION

2.3.1 Search ER Request

- i.) Login SMART.
- ii.) On main menu, click on <u>Search ER Request</u> to go to Search ER Request page.
- iii.) Input search criteria, and press [Search] button. And SMART shall return an ER request list.



The Status showing the current status of the ER request, below are list of status:

- Awaiting Principal's Approval:

After school editor submitted ER request and before school principal review and submit

- Rejected by Principal:

ER request rejected by school principal

- Being Processed:

After school submitted ER request and being processed by consultant

- Approved :

ER request approved

- Not Recommended :

ER request not recommended by consultant

- Cancelled:

ER request cancelled

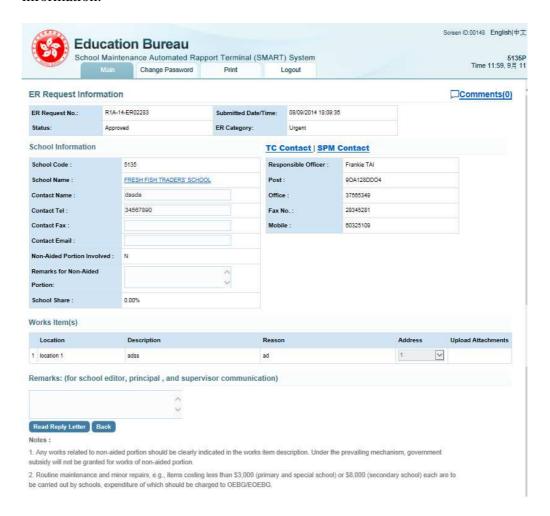
Combined :

ER request has been combined with another ER request which would be processed as the master.

- Completed :

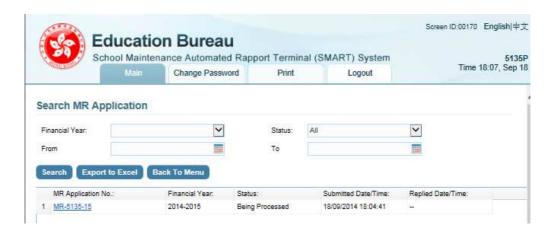
ER request completed

iv.) Click on one of the request and go to ER Request Information page for detail information.



2.3.2 Search MR Application

- i.) Login SMART.
- ii.) On main menu, click on <u>Search MR Application</u> to go to Search MR Application page.
- iii.) Input search criteria, and press [Search] button. And SMART shall return a MR application list.



The Status showing the current status of the MR application, below are list of status:

- Awaiting Principal's Approval:

After school editor submitted MR application and before school principal review and submit

- Rejected by Principal:

MR application rejected by school principal

- Awaiting Supervisor's Approval :

After school principal submitted MR application and before school supervisor review and submit

- Rejected by Supervisor :

MR application rejected by school supervisor

- Rejected by SSDO:

MR application rejected by SSDO

- Being Processed :

After school submitted MR application and being processed by SSDO

- Disapproved:

MR application disapproved

- Approved:

MR application approved

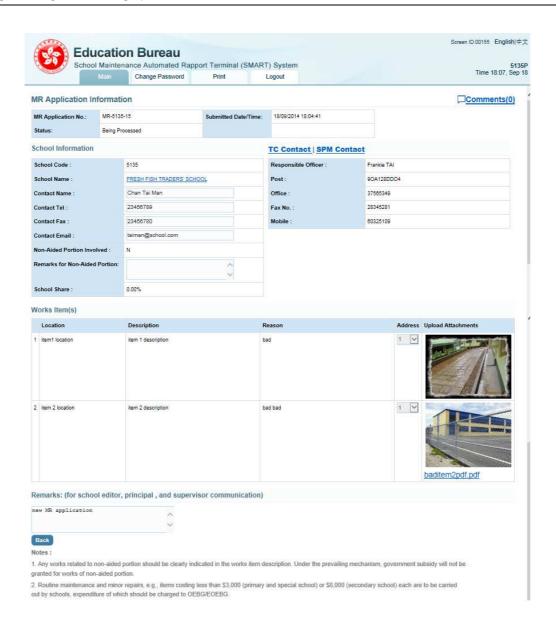
- Cancelled:

MR application cancelled

- Completed:

MR application completed

iv.) Click on one of the application and go to MR Application Information page.



3 SUPPORT AND TROUBLESHOOTING

3.1 SUPPORT HOTLINE AND EMAIL

In case if user cannot access the system or having any other problems while using the system, they are advised to contact SMART support team either via hotline 3163 0040 or email smartsupport@edb.gov.hk.

Operating hours for the hotline is:

• 9am ~ 12:45pm & 1:45pm ~ 6pm; Monday ~ Friday (except Public Holiday)

3.2 BUSINESS CONTINGENCY ARRANGEMENT

Should SMART support team determines/concludes the inaccessibility cannot be recovered shortly for whatever reasons, SMART support team will then advise user to submit request form to district duty officer (term consultant) via fax (using the forms mentioned below) as business contingency arrangement.

3.3 REQUEST FORMS FOR CONTINGENCY ARRANGEMENT

Request forms for contingency arrangement can be downloaded from the website of EDB at the following URLs.

- Request Form for Emergency Repairs (ER) in Non-estate Aided Schools (ENGLISH)
 http://www.edb.gov.hk/attachment/en/sch-admin/sch-premises-info/sch-premises-maintenance/ER%20form_NE_%20%20(E)_MTC.pdf
- Request Form for Emergency Repairs (ER) in Non-estate Aided Schools (TRADITIONAL CHINESE)
 http://www.edb.gov.hk/attachment/tc/sch-admin/sch-premises-info/sch-premises-maintenance/ER%20form_NE_%20%20(C)_MTC.pdf
- Request Form for Emergency Repairs (ER) in Estate Aided Schools (ENGLISH)
 http://www.edb.gov.hk/attachment/en/sch-admin/sch-premises-info/sch-premises-maintenance/ER_Form_E_e_MTC-April2014.pdf
- Request Form for Emergency Repairs (ER) in Estate Aided Schools (TRADITIONAL CHINESE)
 http://www.edb.gov.hk/attachment/tc/sch-admin/sch-premises-info/sch-premises-maintenance/ER_Form_E_tc_MTC-April2014.pdf