

SMART

Science Management Action and Record Tracking

Usage Guide

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What is SMART?

- SMART is a web based action and item tracking system.
- SMART can be used to track many different types of data.
- The data is categorized by activities. Each category contains multiple data elements known as items.

What is a Category?

- A category is a group of related items.
- Each category has at least one item associated with it. An item type provides the ability to further categorize the item.
- Everyone should have rights to see at least one category.
- Rights to add, edit and view items in a category can be restricted. If some items are not being displayed, user rights may be restricted.
- Two more categories can be associated with each other. When this occurs, one category is considered the master category and the others are sub categories. Each item in a sub category must be associated with an item in the master category.

What is an Item?

- An item is a single record within a category.
- Each item must be associated with a only category.
- The rights to a specific item in a category may be limited.
- Rights to add, edit, schedule, assign, delete, resolve and close an item can be restricted. If you are attempting to perform an action and do not see the appropriate link or field, the right to perform that action has been limited.

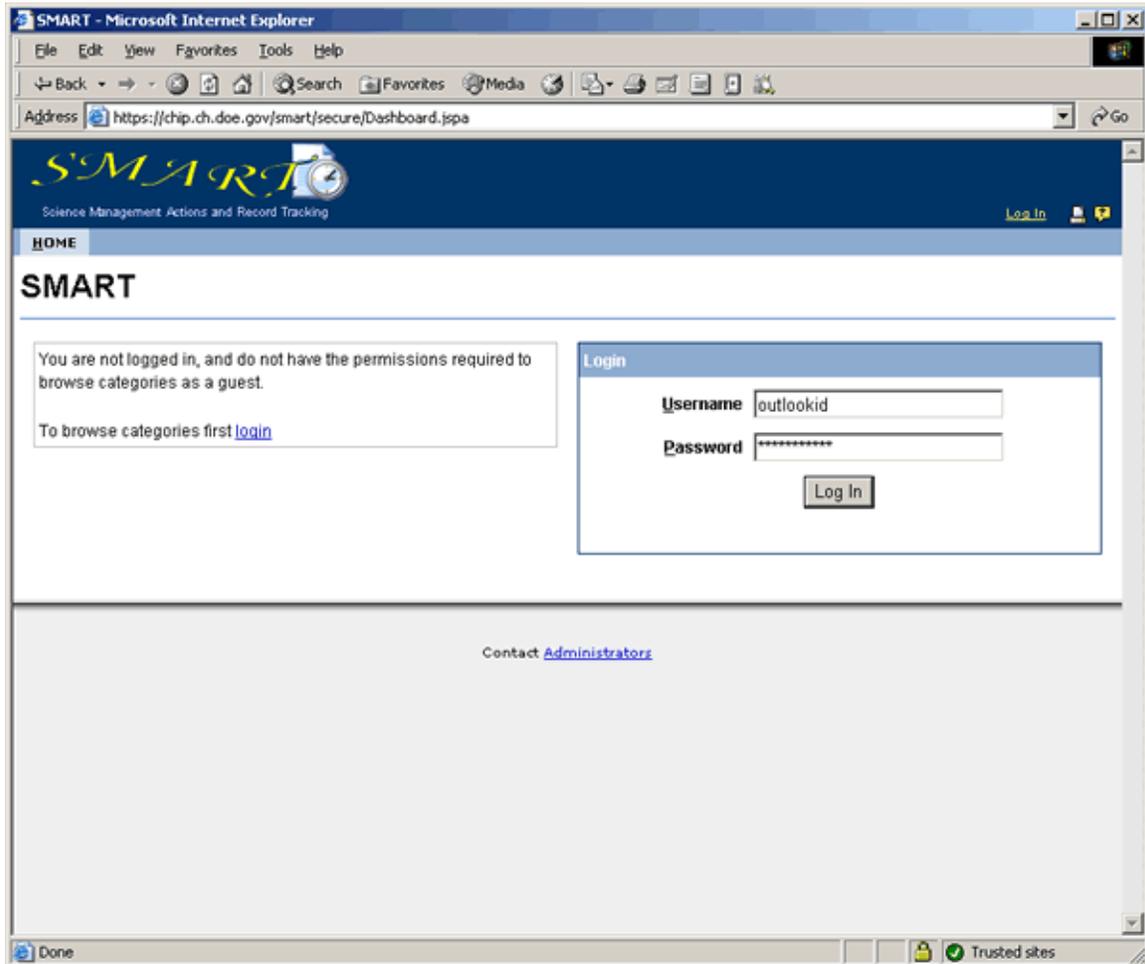
Master - Sub Item relationship

- Some category groups provide a master - sub item relationship. In this relationship a master item contains high level information and the sub items contain detailed information.
- A master item can have 0, 1, or many sub-items associated with it.
- Each sub-item must be associated with only one master item.

Accessing SMART

Access the SMART system from the following web address:

<https://chip.ch.doe.gov/smart>



Enter your Outlook username and your Outlook password to log into the system.

Browsing a Category

To browse a project, click on the name of the project on the home page or click on the browse project link in the menu bar.

SMART - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

Address <https://chip.ch.doe.gov/smart/secure/Dashboard.jspa> Go

SMART
Science Management Actions and Record Tracking

User: Christine Pellini [Filters](#) | [Profile](#) | [Log Out](#)

[HOME](#) **[BROWSE CATEGORY](#)** [FIND ITEMS](#) [CREATE NEW ITEM](#) QUICK SEARCH:

SMART

[Configure your Dashboard](#)

Category: **Sample Project (SP)**

Lead: [Smart Admin](#)
Reports: [Open Items](#) |

Filter Items:

- ALL	- Resolved recently
- Outstanding	- Added recently
- No Area	- Updated recently
- Assigned to me	- Most important
- Reported by me	

Saved Filters: [\(Create New | Manage Filters\)](#)
You have no saved filters at the moment. [Create new filters.](#)

Open Items: **Assigned To Me** (Displaying 3 of 3)

<input type="checkbox"/>	SST-2 This also needs to be completed
<input type="checkbox"/>	SST-1 Task Needs Done
<input type="checkbox"/>	SP-3 Test 3

Open Items: **In Progress** (Displaying 1 of 1)

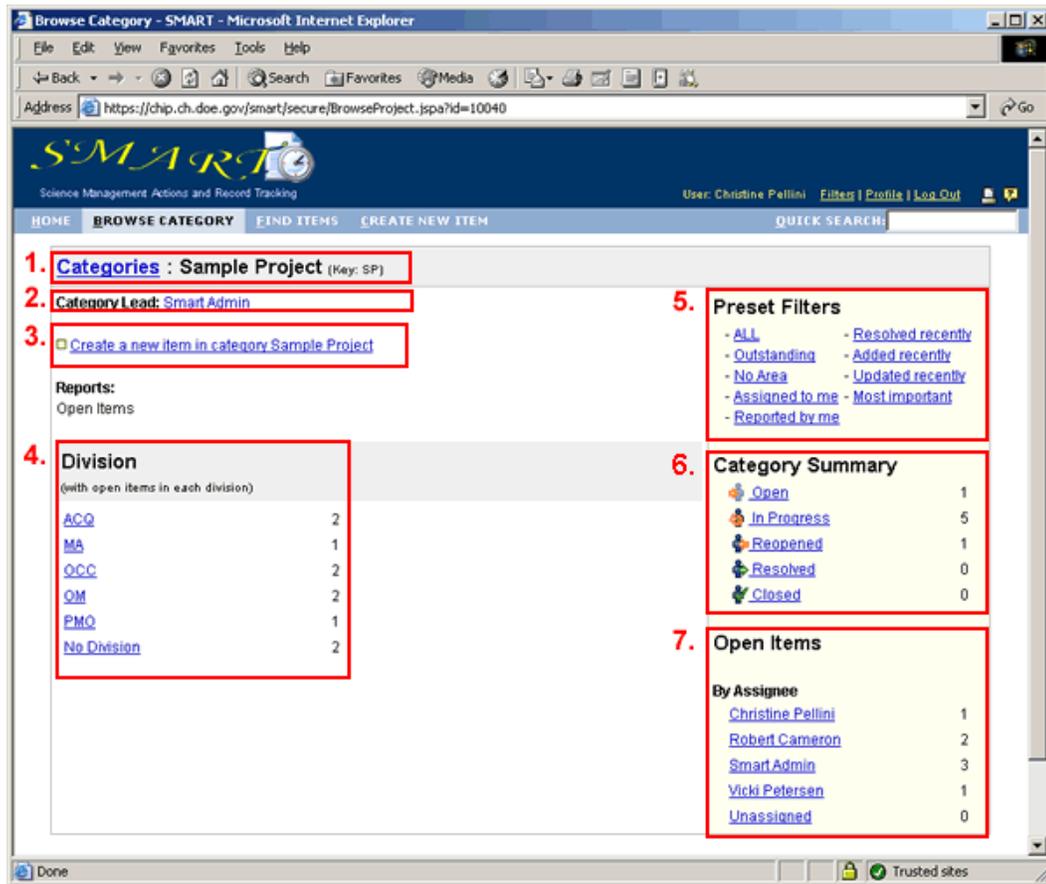
<input type="checkbox"/>	SP-3 Test 3
--------------------------	-----------------------------

[Reported Items](#) | [Watches](#)

Contact [Administrators](#)

Trusted sites

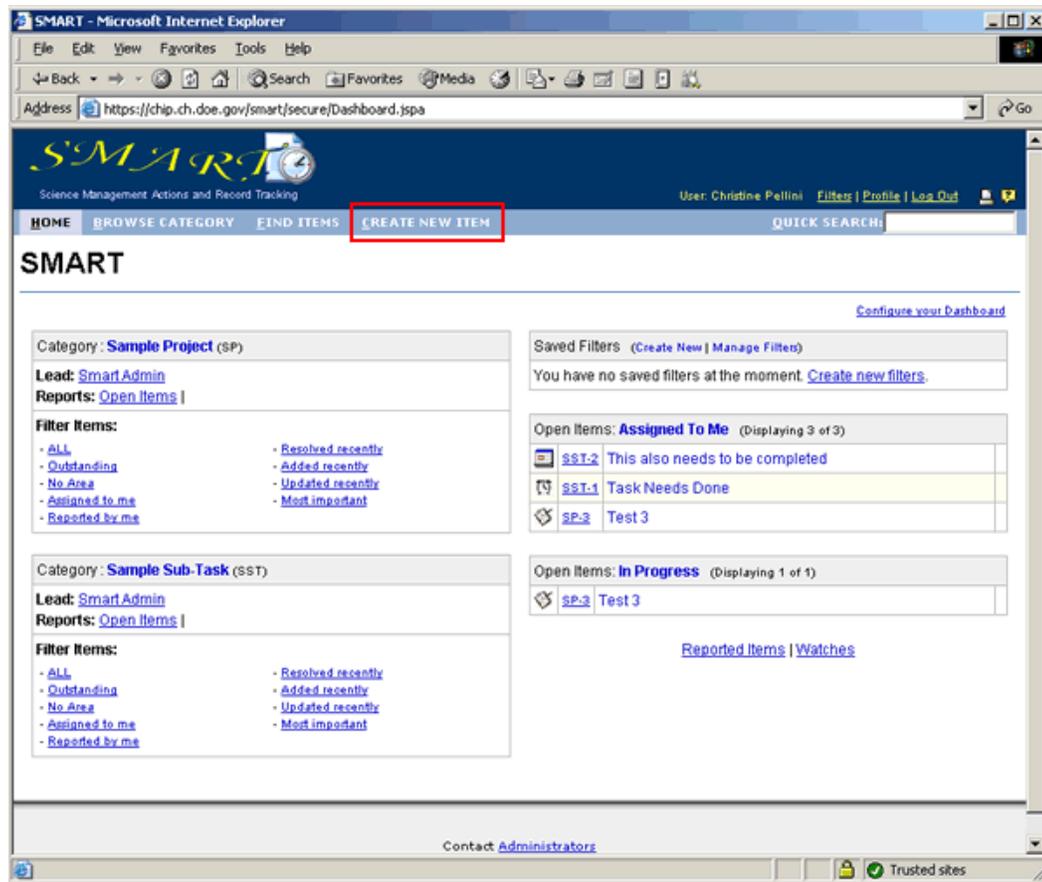
The main page for the project provides a number of services. Each service is described below.



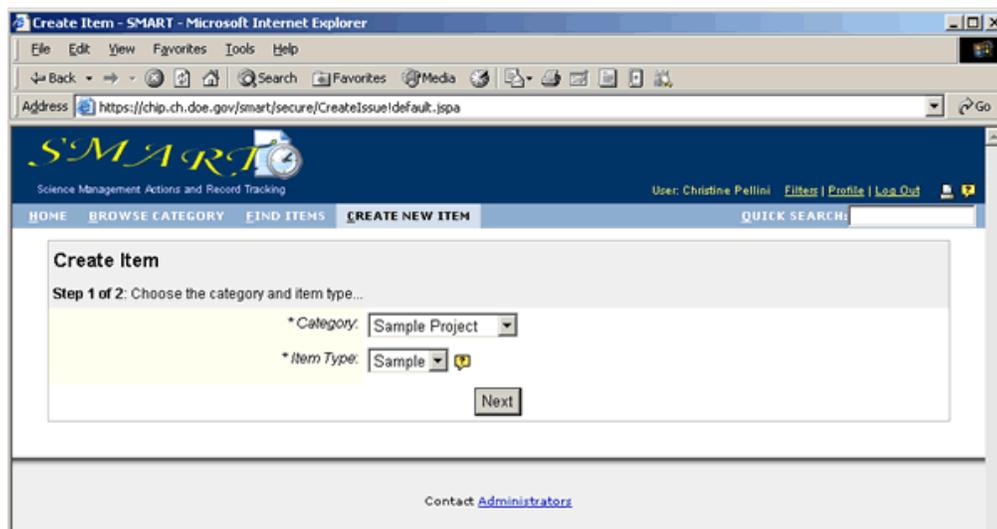
1. Category Name	Identifies the category that is currently being browsed.
2. Category Lead	Identifies the lead person for this category and provide a link to send this person an email message.
3. Create New Item	Provides a link to create a new item that is associated with the current category. For more information on creating a new item see the creating a new item section.
4. Division / Area Listing	Provides an overview of the number of open items associated with each division or area. If a division/area is clicked, a list of the items will appear. This example shows item open for a division; however, a category may have both divisions and areas.
5. Preset Filters	Provides links to a group of predefined filters (queries). Clicking on one of the links will display a listing of all items that match the specified criteria.
6. Category Summary	Provides an overview of the number of items associated with each status. If a status is clicked, a list of the items with that status will appear.
7. Open Items	Provides an overview of all open items sorted by person that they are currently assigned to. If an assignee is clicked, a list of items assigned to that person will appear.

Creating a New Item

To create a new item click on "Create New Item"



Choose Category that the item will be added to and the Item type. Click Next



The entry screen will appear and the form fields will need to be entered. Note that the fields that are displayed will differ based on the category and item type that is item being created.

Create Item
Step 2 of 2: Enter the details of the item...

Category: Sample Project
Item Type: Sample

* Summary:

Due Date:

Assign To: - Automatic -

Division:
ACQ
CR
MA
OCC

Item Received From:

Description:

Contact [Administrators](#)

When entering a new item the following field types may exist:

1. Text Field - Allows for any text entry with a limit of 255 characters
2. Drop Down List - Provides a predetermined list of values from which one can be chosen.
3. Select List - Provides a predetermined list of values from which multiple items can be chosen by holding down the shift key.
4. Date Field - Allows a date to be entered. The calendar next to the field may be used to select a date or a date may be enter in the format of MM/DD/YYYY.
5. Text Area - Allows for an unlimited amount of text to be entered.

Note that required fields are marked with an asterisk.

Adding a Sub-Item

Adding a Sub-Item is similar to create a new master item. To create a new sub-item you can click "Create New Item" as shown above or click Add a Sub-Item inside of the master item.

The screenshot shows the SMART web application interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://chip.ch.doe.gov/smart/browse/SP-3>. The page title is "[#SP-3] Test 3 - SMART - Microsoft Internet Explorer". The SMART logo is visible at the top left, with the tagline "Science Management Actions and Record Tracking". The user is identified as "User: Christine Pellini" with links for "History", "Filters", "Profile", and "Log Out". The navigation menu includes "HOME", "BROWSE CATEGORY", "FIND ITEMS", "CREATE NEW ITEM", and "QUICK SEARCH:". The main content area displays details for "Test 3", including its creation and update dates, category ("Sample Project"), and division ("ACQ"). The "ACQ Groups" section shows "ACQ - SPD" and "Item Received From" is "hq". The "Description" field contains the text "testing". Below the description are links for "All", "Comments", and "Change History". The "Operations" section on the left lists various actions, with "Add a Sub-Item to this Activity" highlighted by a red rectangular box. Other operations include "Assign", "Attach file", "Attach picture", "Comment", "Delete", "Edit", "Set a Reminder", and "Send an E-Mail". The status of the item is "In Progress" and the assignee/reporter is "Christine Pellini".

In addition to choosing the category and item type a master item must be specified when creating a sub-item.

Viewing an Item

When viewing an item, the screen will look similar to the one below. The information that has been entered will be displayed on the right hand side. Note that fields that are not filled in will not be displayed. Any comments that have been added to this item will be displayed on the lower right hand side of the page.

The screenshot shows a Microsoft Internet Explorer browser window displaying the SMART! web application. The address bar shows the URL: <https://chip.ch.doe.gov/smart/browse/SP-4>. The page title is "[#SP-4] Welcome to SMART! - SMART - Microsoft Internet Explorer".

The SMART! logo is at the top left, with the tagline "Science Management Actions and Record Tracking". The user is identified as "User: Christine Pellini" with links for "History", "Filters", "Profile", and "Log Out".

The navigation menu includes: HOME, BROWSE CATEGORY, FIND ITEMS, CREATE NEW ITEM, and QUICK SEARCH: [input field].

Item Details

- Key: [SP-4](#)
- Type: Sample
- Status: In Progress
- Assignee: [Robert Cameron](#)
- Reporter: [Robert Cameron](#)

Available Workflow Actions

- [Resolve Item](#)

Operations

- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item ([to me](#))
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- Watching:**
You are not watching this item.
[Watch it](#) to be notified of changes

Welcome to SMART!
Created: 07/12/04 01:58 PM Updated: 07/12/04 02:00 PM Due: 09/28/04

Category: [Sample Project](#)

Division: [OM](#)

Sub-Items

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

Item Received From: Example Person

Description
Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

Switching between master and sub items

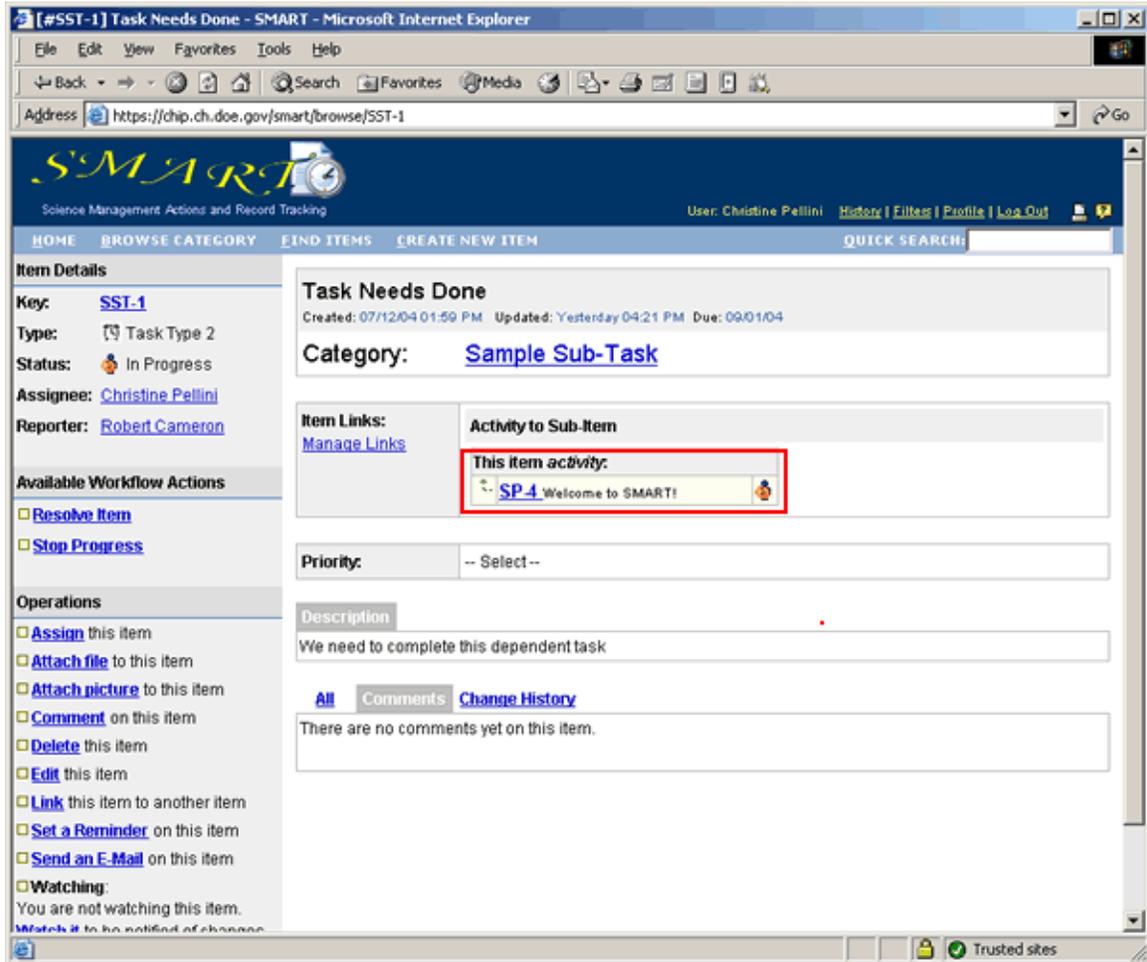
Given the relationship between master and sub items, a link to each sub item is displayed in the within the master record. To view the details of the sub-item click on the key field for the desired sub item.

The screenshot shows the SMART! web application interface. The main content area displays the details for a master item with Key 'SP-4'. The 'Sub-Items' section is highlighted with a red border and contains the following table:

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

The 'SST-1' key field in the first row of the table is highlighted with a red box. The interface also shows navigation tabs (HOME, BROWSE CATEGORY, FIND ITEMS, CREATE NEW ITEM), a search bar, and various workflow actions on the left side.

To return to the master item, click on the name of the item in the Links section.



Viewing the History of an Item

This application provides a complete history of all changes that have been made to an item. The old value, the new value, the person that made the change and the date and time of the change are all recorded. To view the history of an item, click "Change History".

The screenshot shows the SMART application interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://chp.ch.doe.gov/smart/browse/SST-1?page=history>. The page title is "[#SST-1] Task Needs Done - SMART - Microsoft Internet Explorer".

The main content area displays the details for the task "Task Needs Done". The key is "SST-1", the type is "Task Type 2", the status is "In Progress", the assignee is "Christine Pellini", and the reporter is "Robert Cameron". The task was created on 07/12/04 at 01:59 PM, updated yesterday at 04:21 PM, and is due on 09/01/04. The category is "Sample Sub-Task".

Under "Available Workflow Actions", there are options for "Resolve Item" and "Stop Progress". Under "Operations", there are various actions like "Assign", "Attach file", "Attach picture", "Comment", "Delete", "Edit", "Link", "Set a Reminder", and "Send an E-Mail".

The "Change History" section is highlighted with a red box. It shows two changes:

Change by	Original Value	New Value
Robert Cameron [07/12/04 01:59 PM]		This issue activity SP-4 [SP-4]
Christine Pellini [07/29/04 04:21 PM]	status: Open [1]	In Progress [3]

Editing an Item

An item can be edited by clicking on the "Edit" link on the left hand side of the page when viewing an item.

The screenshot shows a Microsoft Internet Explorer browser window displaying the SMART! web application. The address bar shows the URL: <https://chip.ch.doe.gov/smart/browse/SP-4>. The page title is "[#SP-4] Welcome to SMART! - SMART - Microsoft Internet Explorer".

The main content area displays the following information:

- Welcome to SMART!**
- Created: 07/12/04 01:58 PM Updated: 07/12/04 02:00 PM Due: 09/28/04
- Category:** [Sample Project](#)
- Division:** [OM](#)

Sub-Items

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

Item Received From: Example Person

Description: Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

Item Details

Key: [SP-4](#)

Type: Sample

Status: In Progress

Assignee: [Robert Cameron](#)

Reporter: [Robert Cameron](#)

Available Workflow Actions

- [Resolve Item](#)

Operations

- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item [\(to me\)](#)
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- Watching:**
You are not watching this item.
[Watch it](#) to be notified of changes

The screen below will allow all fields values of an item to be changed. Once the editing is completed, a comment regarding the changes may be added, but is not required. Click "Update" to process the changes.

Edit Item

Use this form to edit the fields of this item. You can optionally add a comment at the same time explaining your changes.

* Summary:

Due Date:

Assign To:

Division:

OM Groups:

Item Received From:

Description:

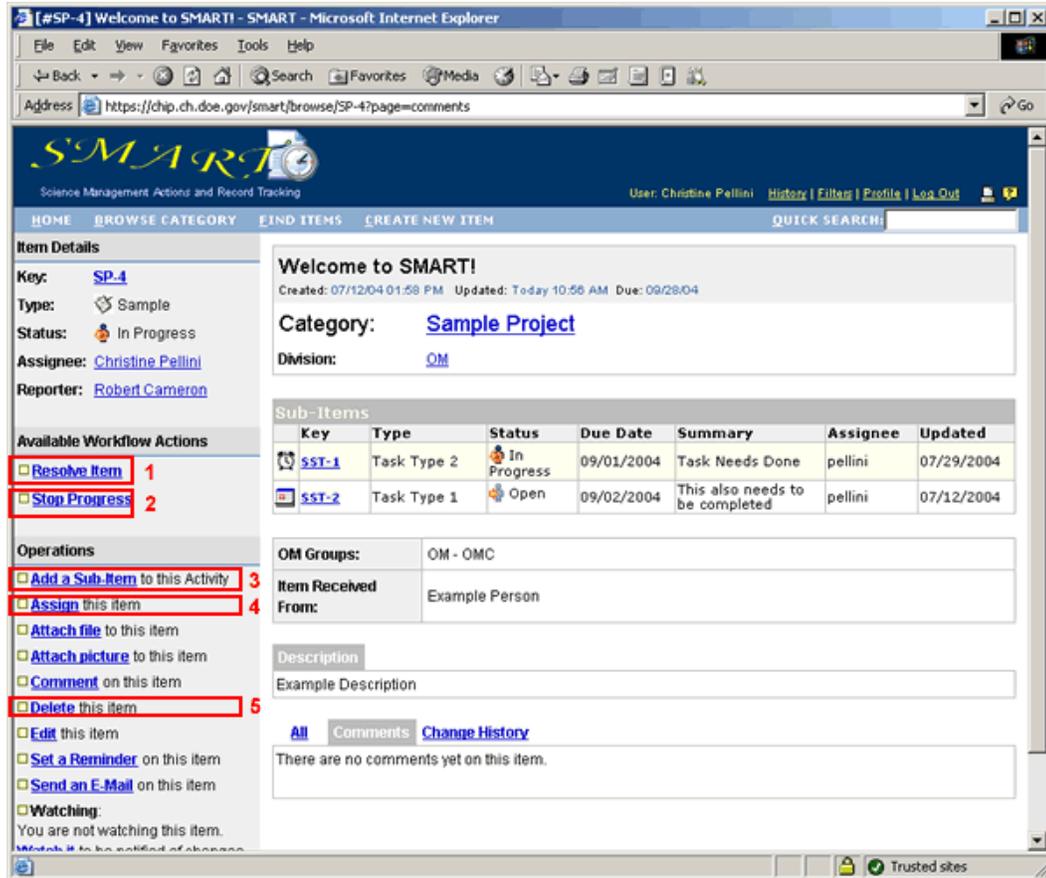
Comment: (an optional comment describing this update)

Update comment:

Comment Viewable By:

Additional Editing Functions

When viewing an option many additional editing options are available. The additional functionality is described below:



<p>1. Resolve, Close, Reopen Item</p>	<p>Allows change of the status of an item to Resolved, Closed, or Reopened. The label of this functionality will change based on the current status. For example, if the current status is resolved, the label would read Close Item. See Resolving an Issue for more information.</p>
<p>2. Start, Stop Progress</p>	<p>Allows a change of the status to an item. Start Progress will change the status to In Progress. Stop Progress will change the status to Open. The label of this functionality will change based on the current status.</p>
<p>3. Add a Sub-Item</p>	<p>Allows the addition of a new Sub-Item which will automatically be associated with this master record. See Creating a New Item for more information</p>
<p>4. Assign</p>	<p>Allows the person identified as the assignee to be changed. See Assigning an Item for more information.</p>
<p>5. Delete</p>	<p>Allows an item to be deleted. It will be permanently removed from the database.</p>

Adding a Comment

SMART provides the ability to add comments to an individual item. To add a comment, click "Comment" on the left -hand side of the page when viewing an item.

The screenshot shows the SMART web application interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://chip.ch.doe.gov/smart/browse/SP-4>. The page title is "[#SP-4] Welcome to SMARTI - SMART - Microsoft Internet Explorer".

The main content area displays the following information:

- Welcome to SMART!**
Created: 07/12/04 01:58 PM Updated: Today 11:15 AM Due: 09/28/04
- Category:** [Sample Project](#)
- Division:** [OM](#)

Sub-Items

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

Item Received From: Example Person

Description: Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

Item Details

Key: [SP-4](#)

Type: Sample

Status: In Progress

Assignee: [Christine Pellini](#)

Reporter: [Robert Cameron](#)

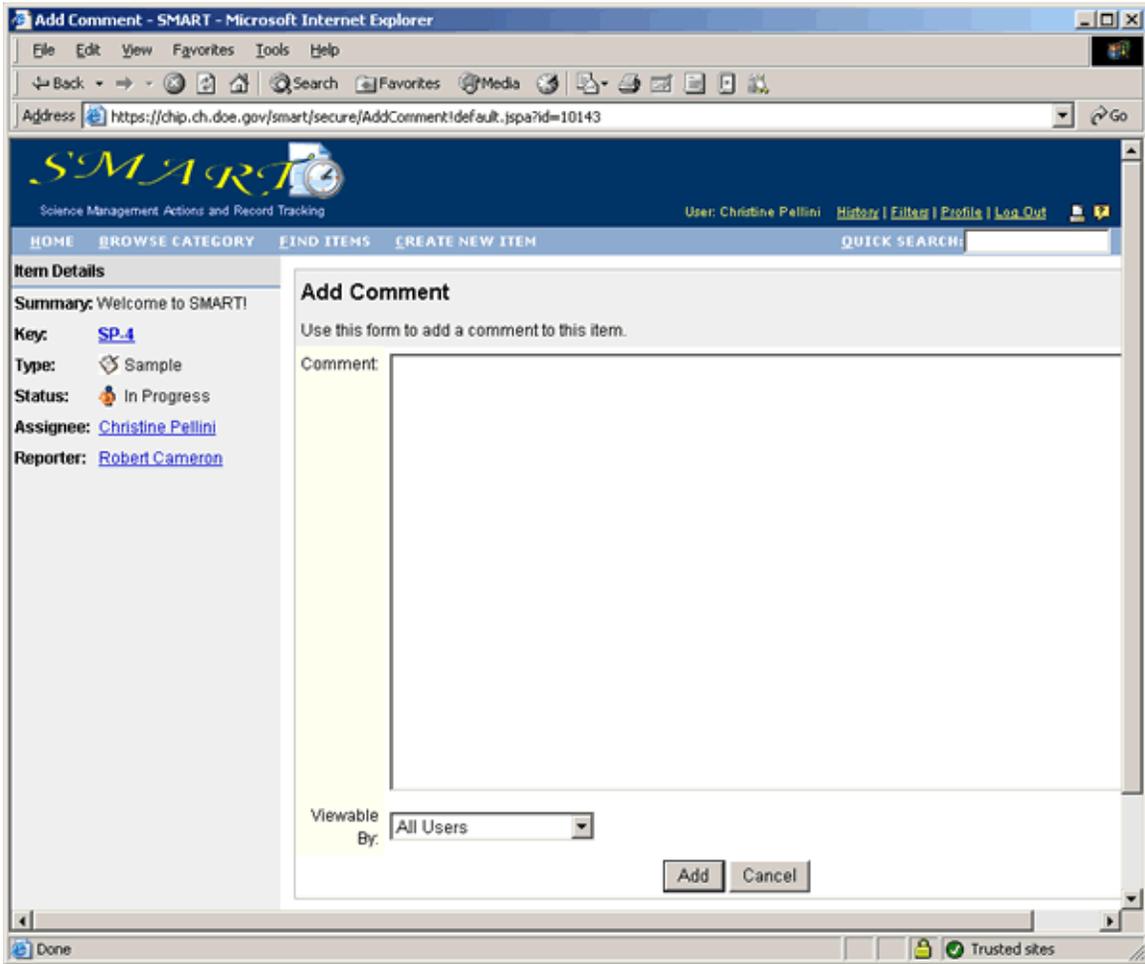
Available Workflow Actions

- [Resolve Item](#)
- [Stop Progress](#)

Operations

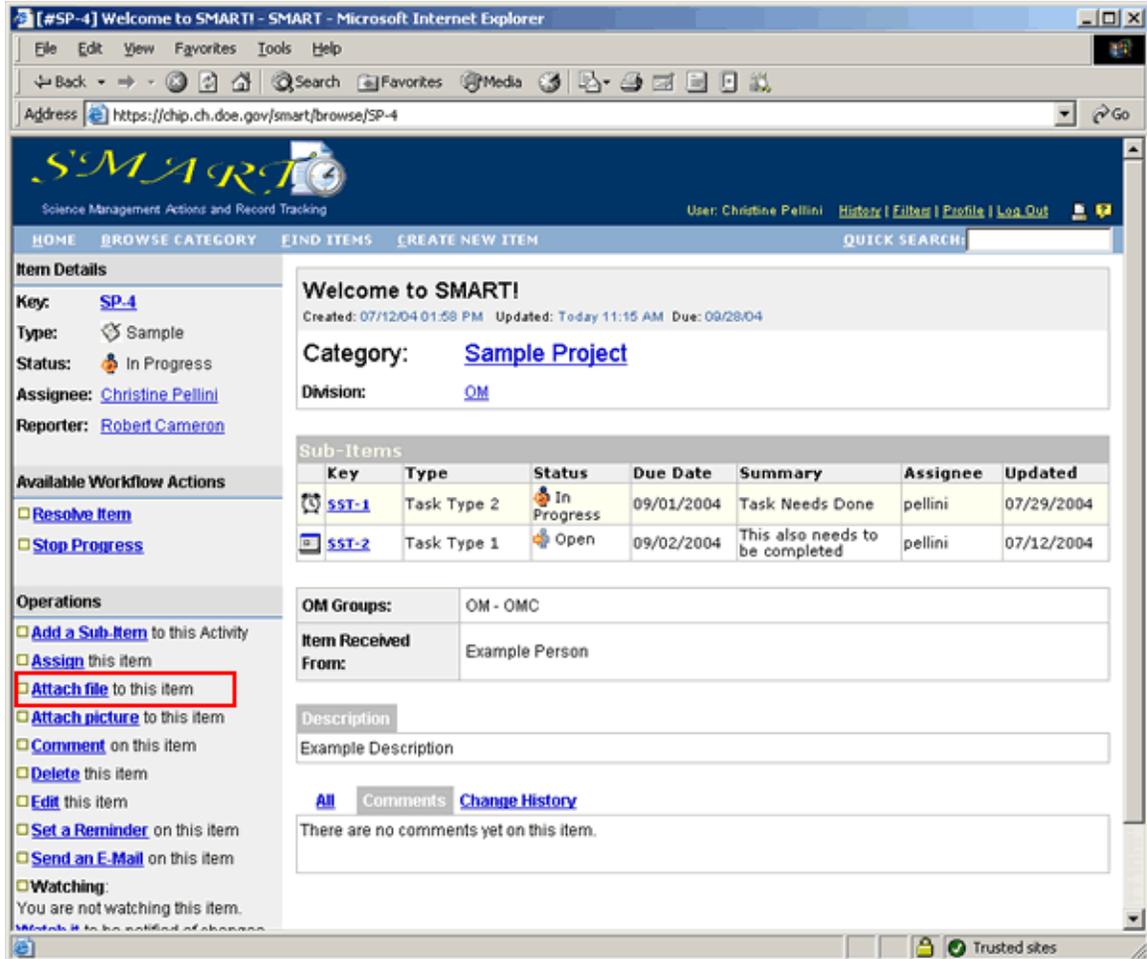
- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- Watching:**
You are not watching this item.

When "Comment" is clicked, the following screen will appear. Once the comment has been entered, click "Add".



Attaching a File

SMART provides the ability to attach files to an item. To attach a file, click "Attach file".



The screenshot shows the SMART web application interface in Microsoft Internet Explorer. The browser address bar shows the URL: <https://chp.ch.doe.gov/smart/browse/SP-4>. The page title is "#SP-4 Welcome to SMARTI - SMART - Microsoft Internet Explorer".

The SMART logo is displayed at the top, with the tagline "Science Management Actions and Record Tracking". The user is identified as "User: Christine Pellini" with links for "History", "Filters", "Profile", and "Log Out".

The navigation menu includes: HOME, BROWSE CATEGORY, FIND ITEMS, CREATE NEW ITEM, and QUICK SEARCH.

Item Details:

- Key: [SP-4](#)
- Type: Sample
- Status: In Progress
- Assignee: [Christine Pellini](#)
- Reporter: [Robert Cameron](#)

Available Workflow Actions:

- [Resolve Item](#)
- [Stop Progress](#)

Operations:

- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- Watching:**
You are not watching this item.

Welcome to SMART!

Created: 07/12/04 01:58 PM Updated: Today 11:15 AM Due: 09/28/04

Category: [Sample Project](#)

Division: [OM](#)

Sub-Items:

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

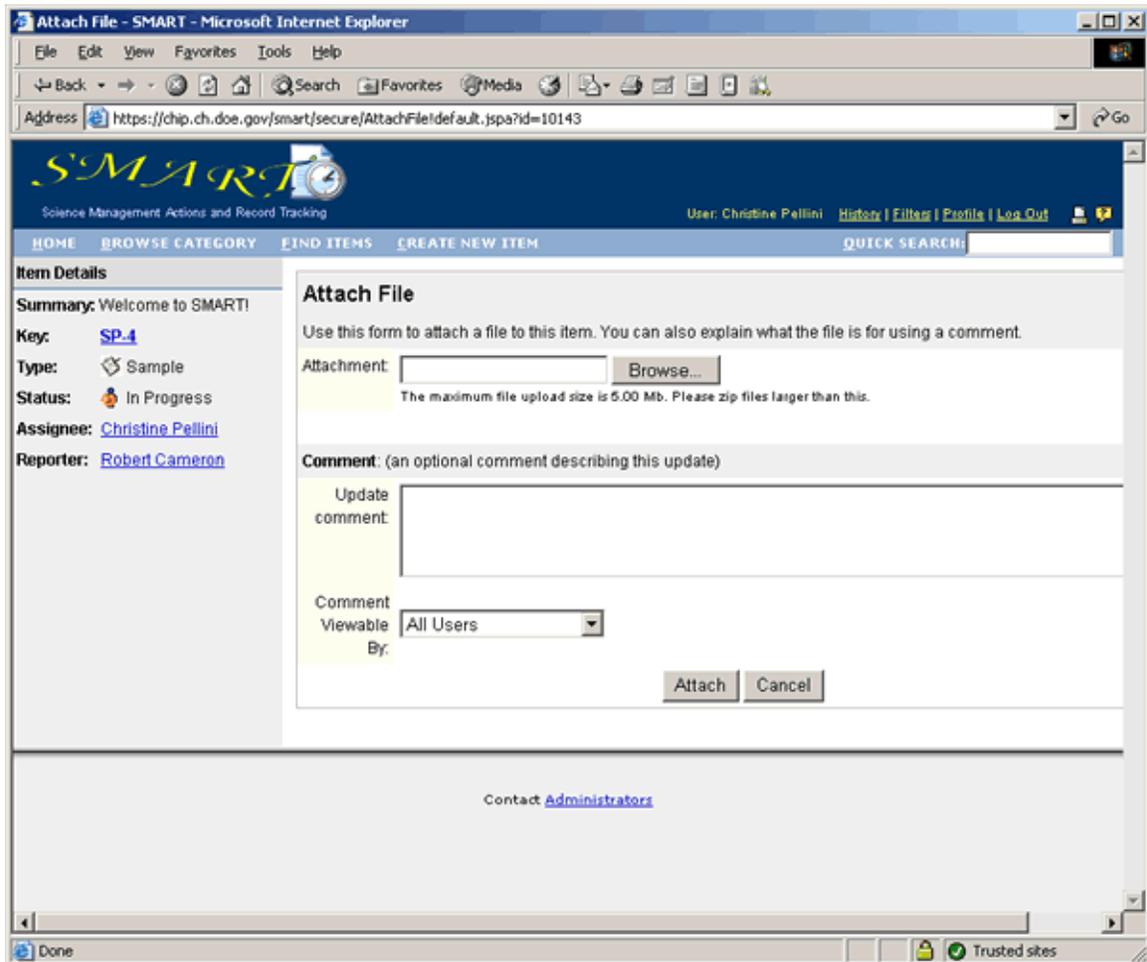
Item Received From: Example Person

Description: Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

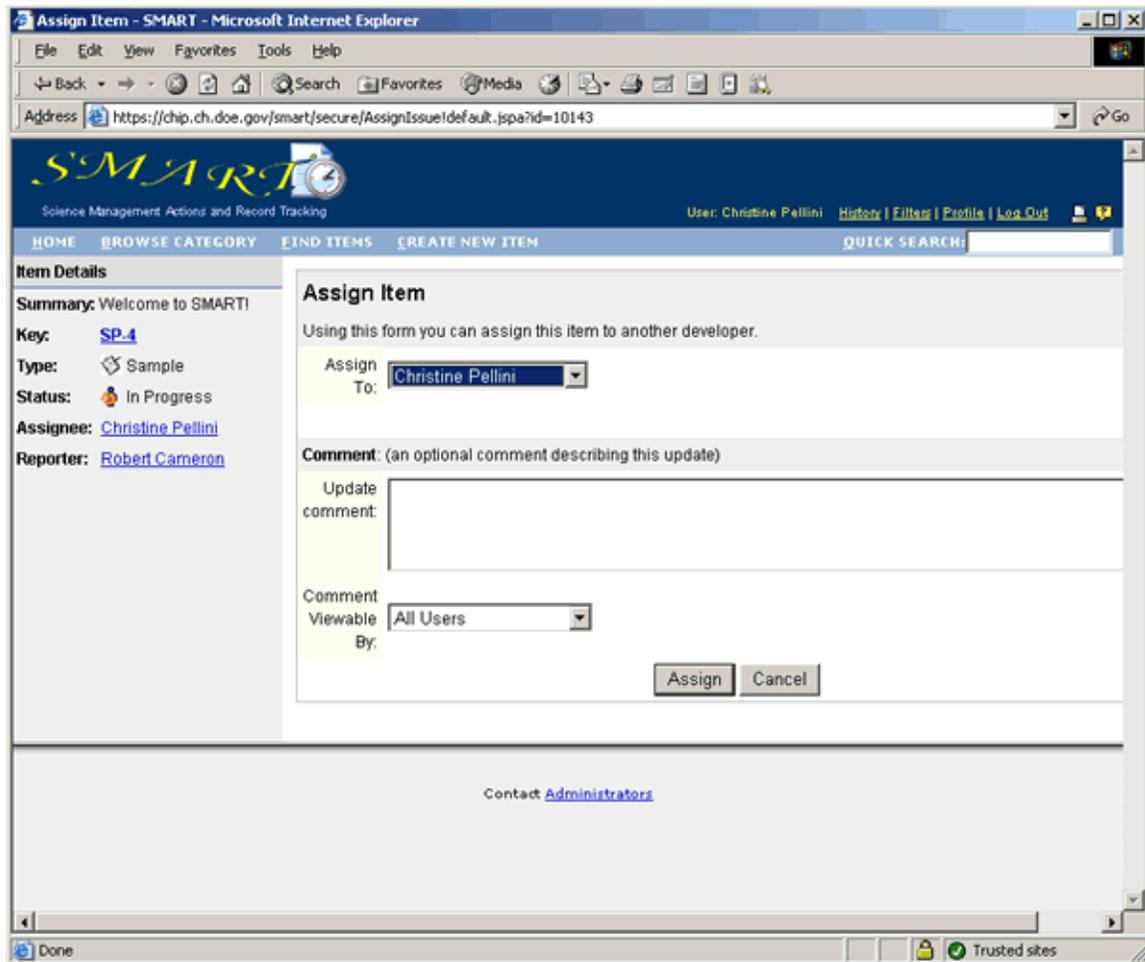
When "Attach file" is clicked, the following screen will appear. To select a file click the Browse button. A windows file selection box will open. Navigate to the file, select it and click open.



Note that the file size is limited to 5 MB per file. There is not a limit to the number of files that can be attached.

Assigning an Item

When clicking "Assign" the following screen will appear. The new assignee must be specified.



The screenshot shows a web browser window titled "Assign Item - SMART - Microsoft Internet Explorer". The address bar shows the URL: <https://chip.ch.doe.gov/smart/secure/AssignIssue/default.jspx?id=10143>. The page header includes the SMART logo and navigation links: HOME, BROWSE CATEGORY, FIND ITEMS, CREATE NEW ITEM, and QUICK SEARCH. The user is identified as "User: Christine Pellini" with links for History, Filters, Profile, and Log Out. The main content area is titled "Assign Item" and contains the following form fields:

- Summary:** Welcome to SMART!
- Key:** [SP-4](#)
- Type:** Sample
- Status:** In Progress
- Assignee:** [Christine Pellini](#)
- Reporter:** [Robert Cameron](#)

The "Assign Item" form itself includes:

- A heading: "Assign Item"
- A sub-heading: "Using this form you can assign this item to another developer."
- An "Assign To:" dropdown menu with "Christine Pellini" selected.
- A "Comment:" section with a text area for "Update comment:" and a "Comment Viewable By:" dropdown menu set to "All Users".
- Buttons for "Assign" and "Cancel".

At the bottom of the page, there is a link to "Contact Administrators".

Choose an Assign To Person and add a comment (optional) and Click Assign. To exit with out saving, click Cancel.

Resolving and Closing an Item

Once the Resolve Item or Close Item function has been pressed, the following screen will appear.

The screenshot shows a web browser window titled "Resolve Item - SMART - Microsoft Internet Explorer". The address bar shows the URL: <https://chip.ch.doe.gov/smart/secure/ResolveIssue!default.jspa?id=10143&action=1>. The SMART logo is visible at the top left, with the tagline "Science Management Actions and Record Tracking". The user is identified as "Christine Pellini" with links for "History", "Filter", "Profile", and "Log Out". The navigation menu includes "HOME", "BROWSE CATEGORY", "FIND ITEMS", "CREATE NEW ITEM", and a "QUICK SEARCH" field.

The main content area is titled "Resolve Item" and contains the following fields and options:

- Resolution:** A dropdown menu currently set to "Cancelled".
- Areas:** A text input field containing "None". Below it, a note says "(Select the areas that this item is actually fixed in)."
- Assign To:** A dropdown menu currently set to "Christine Pellini".
- Comment:** A section titled "(an optional comment describing this update)" containing a text area for "Update comment".
- Comment Viewable By:** A dropdown menu currently set to "All Users".

At the bottom of the form are three buttons: "Resolve", "Resolve and Close", and "Cancel".

Choose a Resolution, an Area (optional), an Assign To person (person that completed the work) and add a comment (optional). Click Resolve or Resolve and Close.

Sending an Email

SMART provides the ability to send an email message containing a link to an item to others that have the ability to see that item. To send an email message, click "Send an Email"

Item Details

Key: [SP-4](#)

Type: Sample

Status: In Progress

Assignee: [Christine Pellini](#)

Reporter: [Robert Cameron](#)

Available Workflow Actions

- [Resolve Item](#)
- [Stop Progress](#)

Operations

- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- [Watching](#): You are not watching this item. [Watch #](#) to be notified of changes.

Sub-Items

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

Item Received From: Example Person

Description

Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

When "Send an Email" is clicked, the following screen will appear. Select the recipient(s). To select multiple people, hold down the Ctrl key and click the desired names. The subject can be changed and a message may be added. Once Send is pressed, the email message is sent immediately. A copy of the message will be sent to the person sending the message.

SMART Send E-Mail - Microsoft Internet Explorer

E-Mail Notification

From: **To:**
Angela.Harvey@ch.doe.gov
Anibel.Taboas@ch.doe.gov
Barbara.Shelby@ch.doe.gov
Beverly.Wilson@ch.doe.gov
Carson.Neely@ch.doe.gov

Link To:

Message Information

Subject:

Message:

Setting a Reminder

SMART provides the ability to set a reminder based on the due date of an item. To add a reminder click "Set a Reminder". Note that a reminder cannot be set for an item that does not have a due date specified.

The screenshot shows the SMART web application interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: <https://chip.ch.doe.gov/smart/browse/SP-4>. The page title is "[#SP-4] Welcome to SMART! - SMART - Microsoft Internet Explorer".

The main content area displays the following information:

- Welcome to SMART!**
Created: 07/12/04 01:58 PM Updated: Today 01:39 PM Due: 09/28/04
- Category:** [Sample Project](#)
- Division:** [OM](#)

Sub-Items

Key	Type	Status	Due Date	Summary	Assignee	Updated
SST-1	Task Type 2	In Progress	09/01/2004	Task Needs Done	pellini	07/29/2004
SST-2	Task Type 1	Open	09/02/2004	This also needs to be completed	pellini	07/12/2004

OM Groups: OM - OMC

Item Received From: Example Person

Description: Example Description

[All](#) [Comments](#) [Change History](#)

There are no comments yet on this item.

Item Details:

- Key:** [SP-4](#)
- Type:** Sample
- Status:** In Progress
- Assignee:** [Christine Pellini](#)
- Reporter:** [Robert Cameron](#)

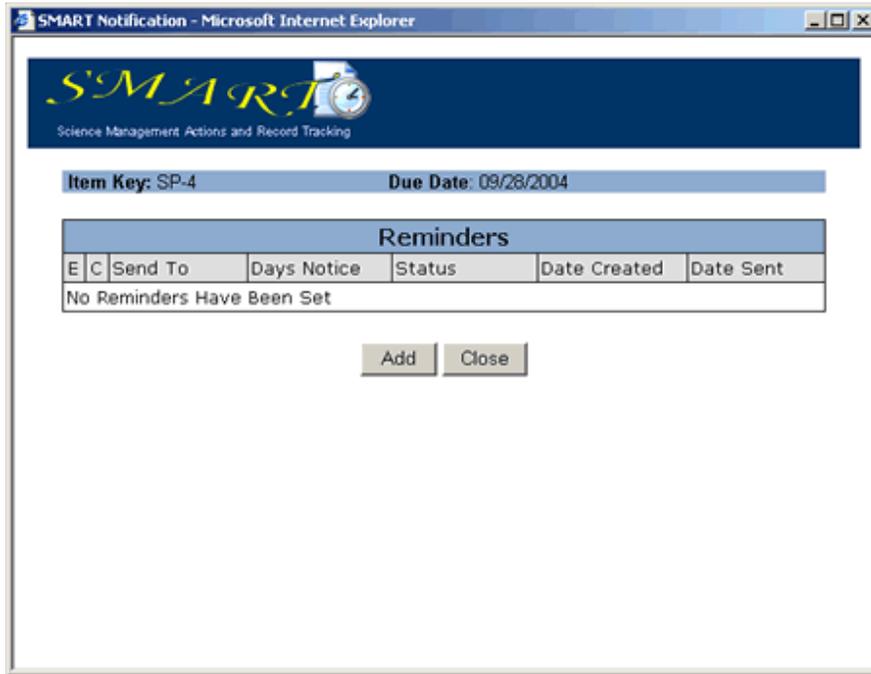
Available Workflow Actions:

- [Resolve Item](#)
- [Stop Progress](#)

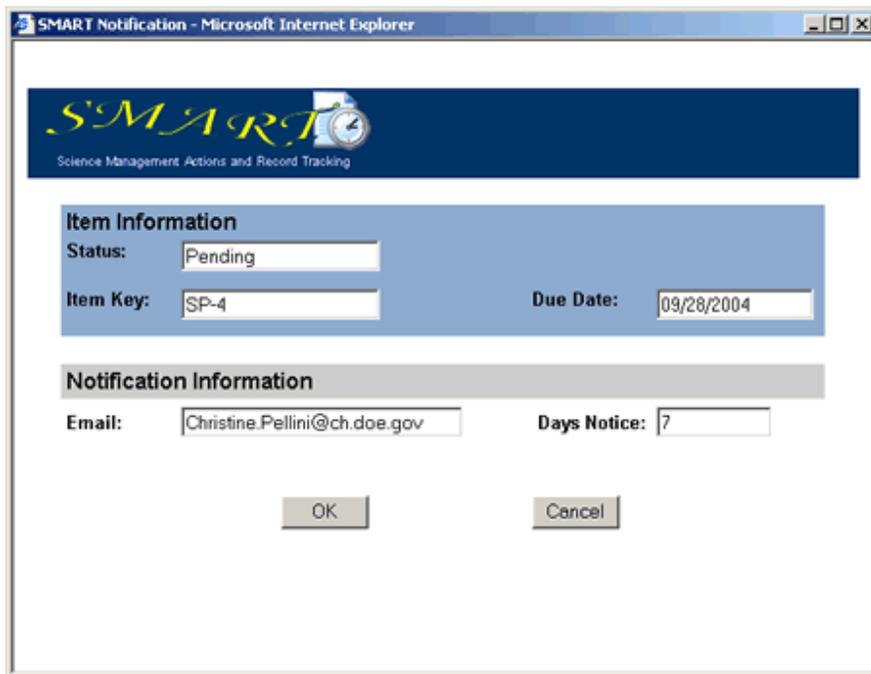
Operations:

- [Add a Sub-Item](#) to this Activity
- [Assign](#) this item
- [Attach file](#) to this item
- [Attach picture](#) to this item
- [Comment](#) on this item
- [Delete](#) this item
- [Edit](#) this item
- [Set a Reminder](#) on this item
- [Send an E-Mail](#) on this item
- Watching:**
You are not watching this item.
[Watch](#) to be notified of changes

When "Set a Reminder" is clicked the following screen will appear. If previous reminders have been set, they will be displayed. To add a new reminder click Add.

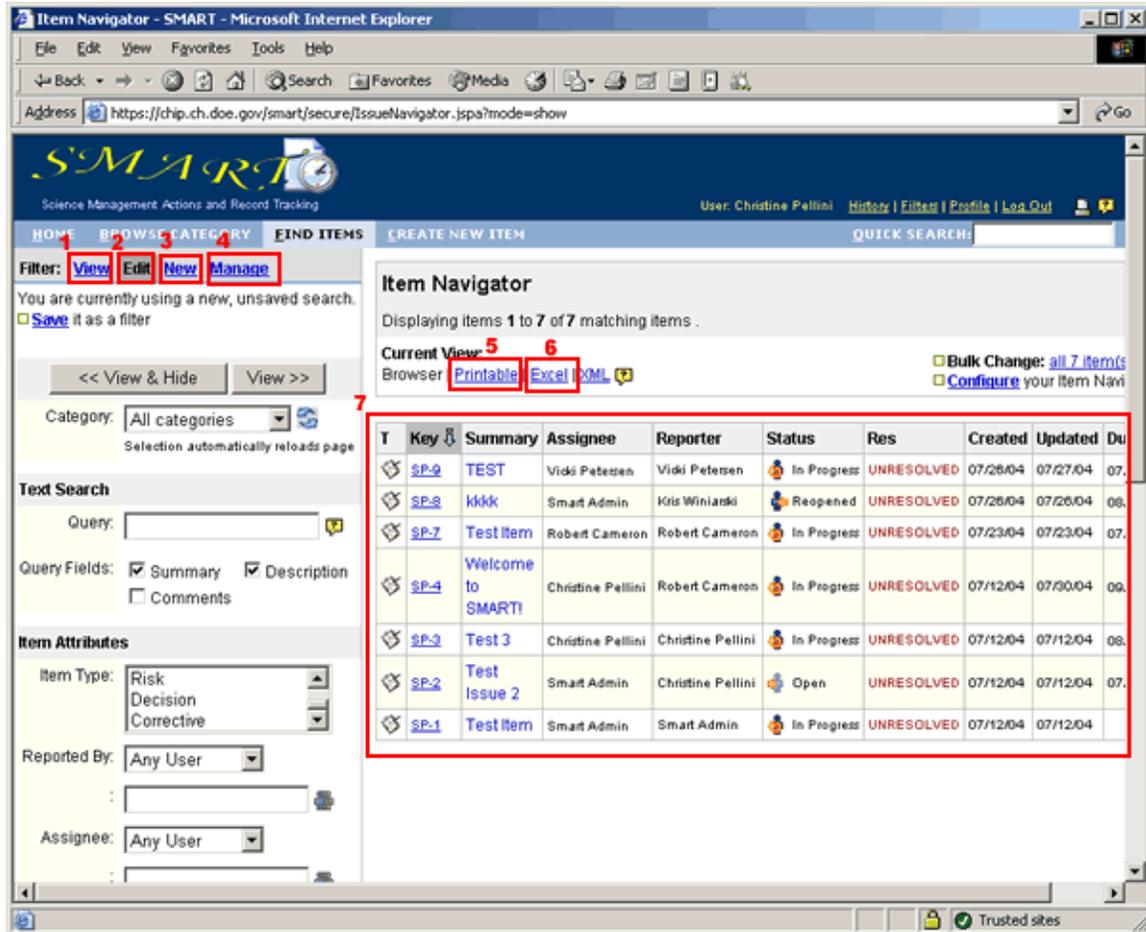


When "Add" is clicked the following screen will appear. By default, the email address enter will be the person that is currently logged in and the Days Notice is 7; both can be changed. The Days Notice indicates the number of days before the due date that the message will be sent. Once complete, click OK and the reminder will be saved.



Navigating Search Results

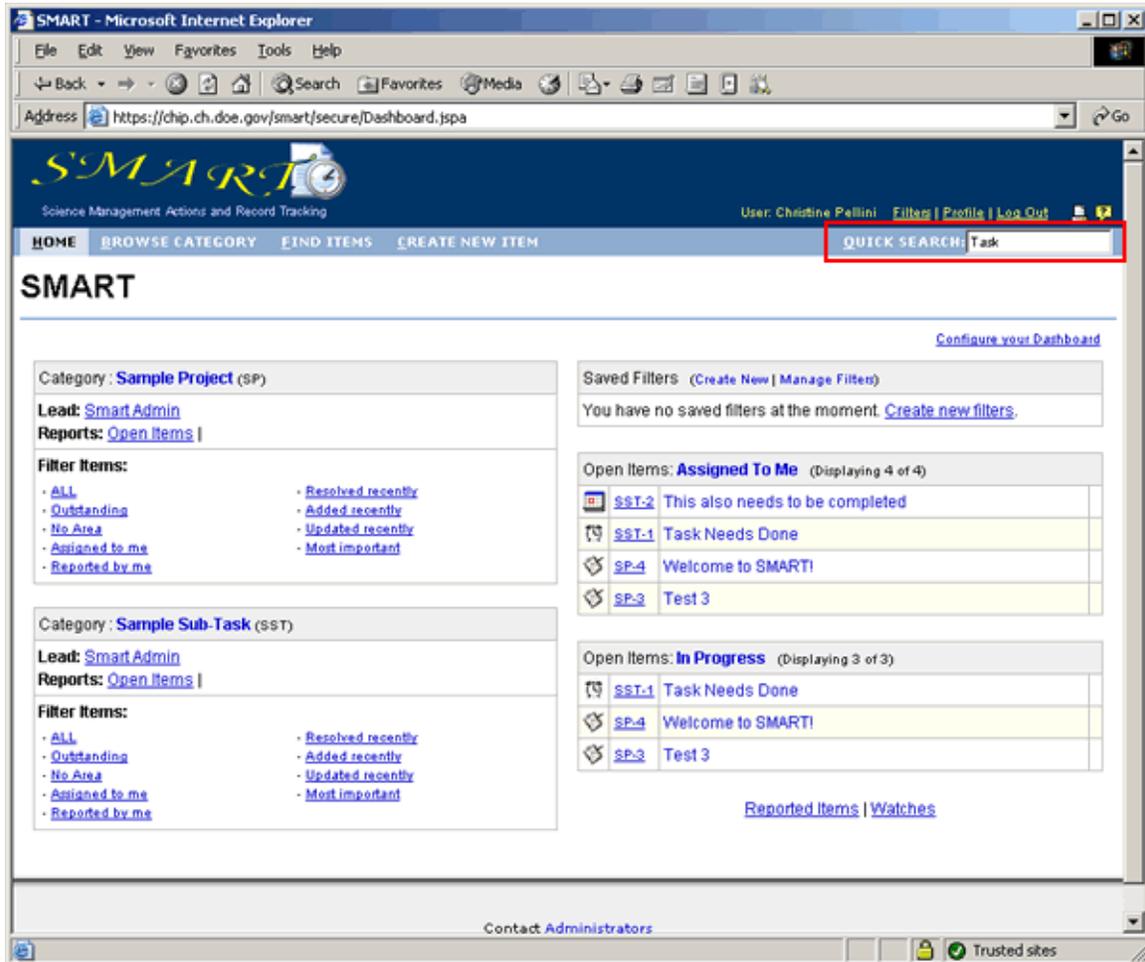
When any search or preset filter is executed, the following screen will appear. This screen contains a number of different options.



1. View	Allows you to view the results of a defined filter
2. Edit	Allows you to view and edit the criteria in the currently displayed filter. A filter can be edited following the same rules for creating a new filter.
3. New	Allows you to create a new blank filter. See creating a custom filter for more information
4. Manage	Allows you to run, delete and change the filters that have been saved.
5. Printable	Changes the view of the page to be more printer friendly. It removes the page headings
6. Excel	Opens and displays the filtered data in an Excel spreadsheet which will allow the data to be saved and analyzed.
7. Navigator Grid	Presents the results of filter in a grid format. The results can be sorted by clicking on the title of the column. When the column name is clicked once, the results will be sorted in descending order, clicking twice will sort the results in ascending order

Using Quick Search

Quick Search is a feature that allows a search to be performed from any screen in the application. To perform a quick search, enter an item key, word or phrase into the Quick Search box located in the upper right hand corner and press the Enter key.



Three different types of searches occur within Quick Search

- If an item key is entered and the item exists, you will be directed to the viewing page for that item.
- If the name of an item type is entered, all items with that item type will be displayed.
- Otherwise, the application will search the summary and description field and for the specified word or phrase and return all items

Creating a Custom Search

To create a new custom search, click on "Find Items".

SMART - Microsoft Internet Explorer

Address: <https://chip.ch.doe.gov/smart/secure/Dashboard.jspa>

SMART
Science Management Actions and Record Tracking

User: Christine Pellini [Filter](#) | [Profile](#) | [Log Out](#)

HOME | BROWSE CATEGORY | **FIND ITEMS** | CREATE NEW ITEM | QUICK SEARCH:

SMART

[dashboard.config](#)

Category: **Sample Project (SP)**

Lead: [Smart Admin](#)

Reports: [Open Items](#) |

Filter Items:

- [ALL](#)
- [Outstanding](#)
- [No Area](#)
- [Assigned to me](#)
- [Reported by me](#)
- [Resolved recently](#)
- [Added recently](#)
- [Updated recently](#)
- [Most important](#)

Category: **Sample Sub-Task (SST)**

Lead: [Smart Admin](#)

Reports: [Open Items](#) |

Filter Items:

- [ALL](#)
- [Outstanding](#)
- [No Area](#)
- [Assigned to me](#)
- [Reported by me](#)
- [Resolved recently](#)
- [Added recently](#)
- [Updated recently](#)
- [Most important](#)

Saved Filters [\(Create New | Manage Filters\)](#)

You have no saved filters at the moment. [Create new filters.](#)

Open Items: **Assigned To Me** (Displaying 4 of 4)

<input type="checkbox"/>	SST-2	This also needs to be completed
<input type="checkbox"/>	SST-1	Task Needs Done
<input type="checkbox"/>	SP-4	Welcome to SMART!
<input type="checkbox"/>	SP-3	Test 3

Open Items: **In Progress** (Displaying 3 of 3)

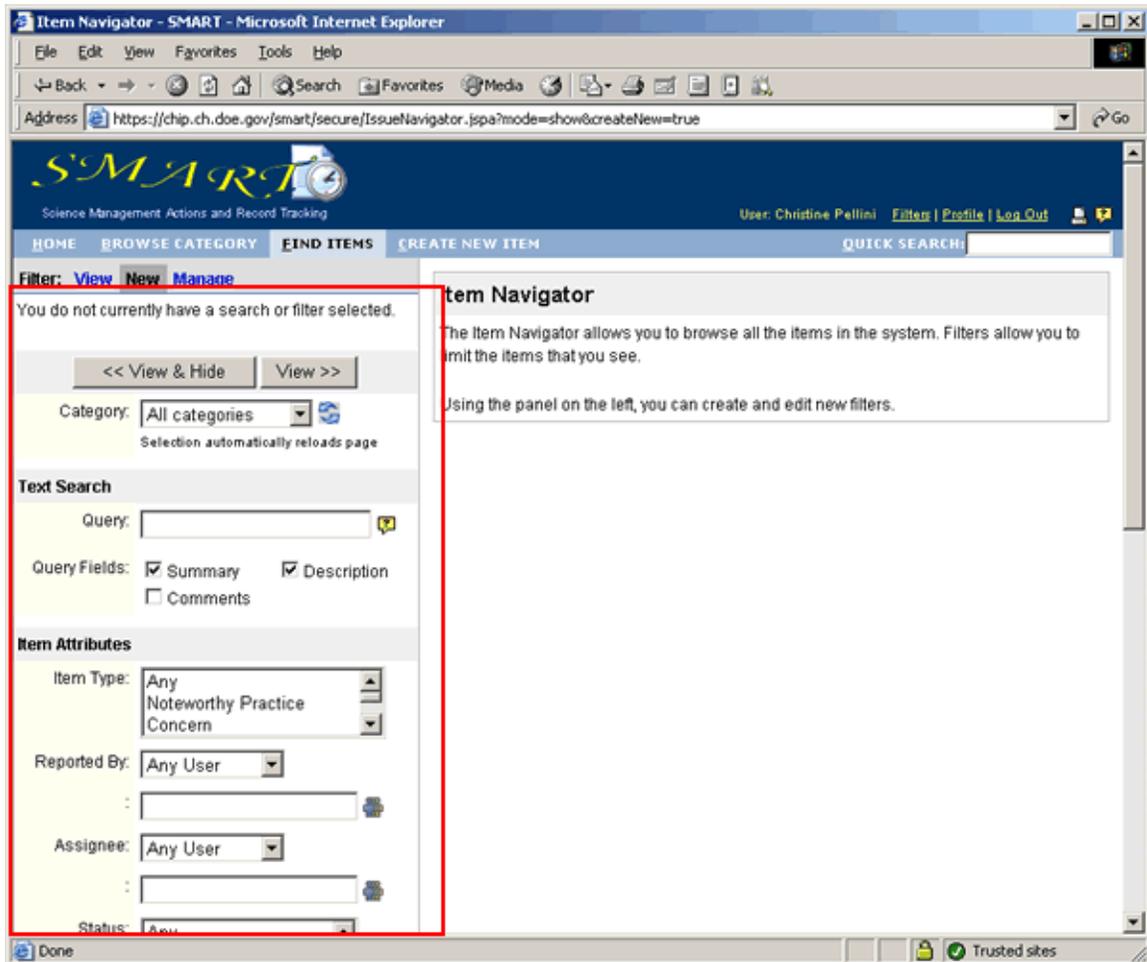
<input type="checkbox"/>	SST-1	Task Needs Done
<input type="checkbox"/>	SP-4	Welcome to SMART!
<input type="checkbox"/>	SP-3	Test 3

[Reported Items](#) | [Watches](#)

[Contact Administrators](#)

Trusted sites

When "Find Items" is clicked the following screen will appear. You will then be able to fill out the desired fields located on the left-hand side of the page.



The fields located on the left-hand side allow a specific category and values for different item attributes to be specified. The attributes include the item type, the assignee, the status, the due date and a text search of the summary and description. If a specific project and item type are chosen, the associated custom fields can be searched.

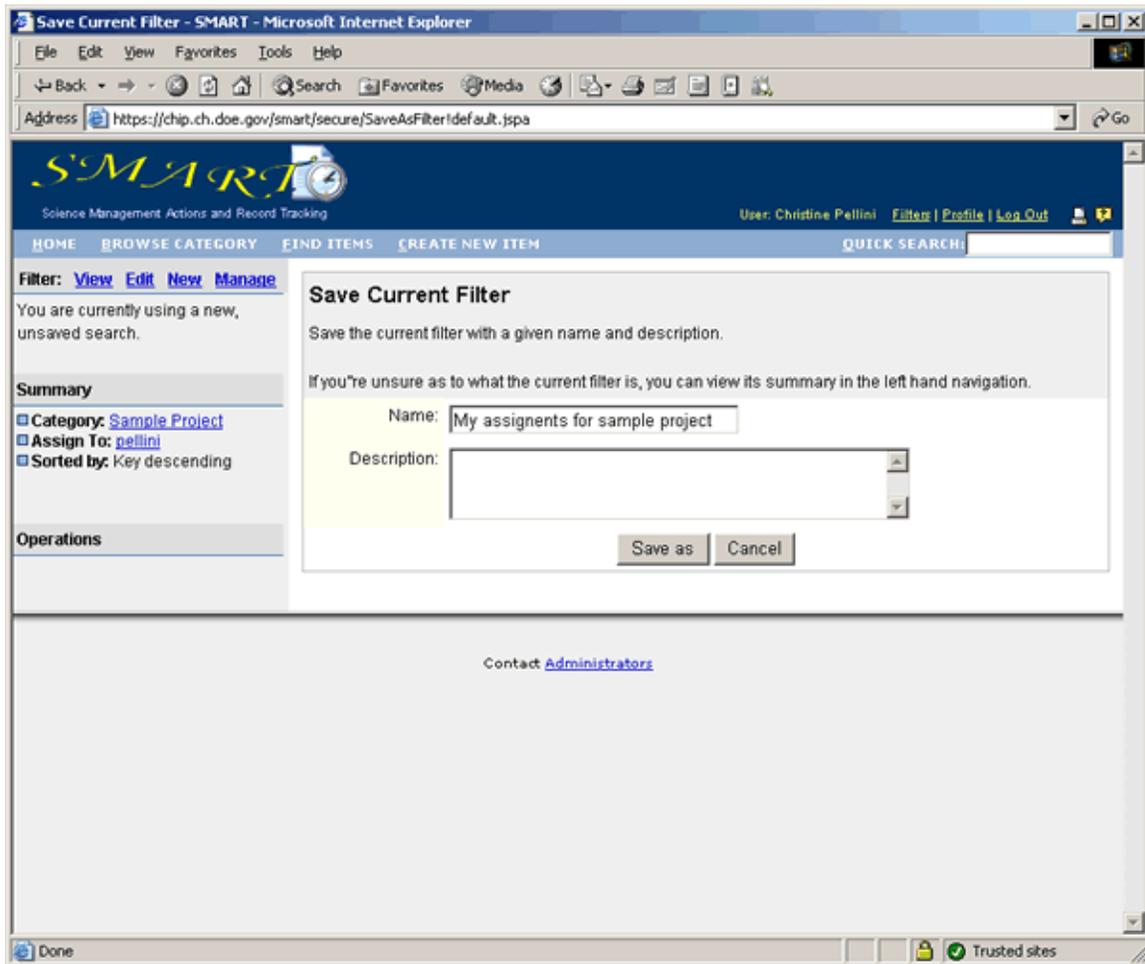
Once the fields are specified, click the View button and the results will be displayed.

Saving Search Criteria

Once a search has been executed, it can be saved. To save a filter, click the Save button located on the left-hand side of the screen.

T	Key	Summary	Assignee	Reporter	Status	Res	Created	Updated
	SP-4	Welcome to SMART!	Christine Pellini	Robert Cameron	In Progress	UNRESOLVED	07/12/04	07/30/04
	SP-3	Test 3	Christine Pellini	Christine Pellini	In Progress	UNRESOLVED	07/12/04	07/12/04

When "Save" is clicked the following screen will appear. Enter a name and a description (optional) for the filter and click Save As.



To access a saved filter, click "Manage" located on the left-hand side.