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Smart Journal Entry

Introduction

Smart Journal is a tool that facilitates the cash transfer process for those activities that are allowed to transfer cash. It looks very similar to a journal entry that has been limited to only allow a few accounts and configured to check for available cash of the activity that is transferring out. Access to the tool is limited to organizational approvers and only those activity numbers in which the organizational approver has access will be allowed to transfer i.e. a user will not be allowed to transfer cash from an activity number in which they are not approvers.

Benefits

It reduces data-entry errors and labor costs by eliminating the need for double entry into the units’ software and PantherSoft.

Navigation

1. Follow this navigation: **Main Menu>Smart Solutions>Smart Documents>Smart Journal**
2. Click on the **“Add a New Value”** tab
3. Click **“Add”** button
4. All fields with an asterisk (*) are required fields.
5. Fill in a description for the journal in the Reason/Description box.
6. Enter the Activity Nbr that is transferring out the cash on the Speedtype Key field on line 1. Only one activity transferring out is allowed per entry. You may also search for an activity by using the magnifying glass.
   **Note:** Only a list of activity numbers in which you are allowed to approve will populate in the list.

7. Select an Account by clicking on the magnifying glass. Only two accounts are available for selection.
8. Once you select the Account for the activity making the transfer it will automatically populate the account for the receiving activity in line 2.

9. In Line 2 you will select the receiving departments by typing the Activity Nbr on the Speedtype key field or by searching for a Activity Nbr by clicking on the magnifying glass.

10. Type the amount to be transferred per activity number as revenue (credit). Also if you need to add lines click on the plus sign and enter a number on the Lines to add field.

11. Click “Save”. You will receive a Journal ID.
12. Click **“OK”**

You have successfully completed a Smart Journal!
Smart ERP Gadgets

Submit: The submit button allows a user to save and submit the smart journal entry. There is no save for later available in the smart journal tool. Once the smart journal is saved it will populate a Journal Id number. The journal ID entry becomes read only once submitted, thus cannot be modified on this page.

Collaborate: button allows a user to comment on the smart journal entry. It is meant to increase collaboration between the activity making the cash transfer and the activity receiving cash the transfer.

Copy: The copy button allows a user to retrieve a previously saved template.

Loading a Template

1. To retrieve a template from the Smart Journal page, a user must hover around the copy button and click on the copy from template. Then a user must select the template they would like to use and click on the OK button.
2. Once a user is selected, any templates saved under that Panther ID will prompt. Select the desired template.

In this case, under that template's name there are two templates available.

3. Select the desired template and click “OK”.

### Copy from Template

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Description</th>
<th>Template Type</th>
<th>Created By</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARTA Online</td>
<td></td>
<td>Shared Template</td>
<td>Davis, Britton M</td>
</tr>
<tr>
<td>COB_SHARED</td>
<td></td>
<td>Shared Template</td>
<td>Rodriguez, Roberto</td>
</tr>
</tbody>
</table>
4. The selected template will now be loaded and ready for you to continue completing it.

**NOTE:** Only Expense Managers are able to create Smart Journals. Therefore, once the journal is saved and a Journal ID is created, it’s automatically approved (there’s no workflow). The controller’s office posts by the next business day.