Introduction to eMARS 3.11

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Introduction to eMARS 3.11

1 – Orientation

The newest version of Advantage Financial, eMARS 3.11, was implemented on July 5, 2018. This course will focus on how to navigate through the newest version of eMARS.

Learning Objectives

At the conclusion of this session, you will be able to:

- Understand enhancements to the User Interface
- Locate Documents and Tables
- Locate and sort records on Tables
- Navigate and understand the enhancements to documents
- Utilize new navigation techniques

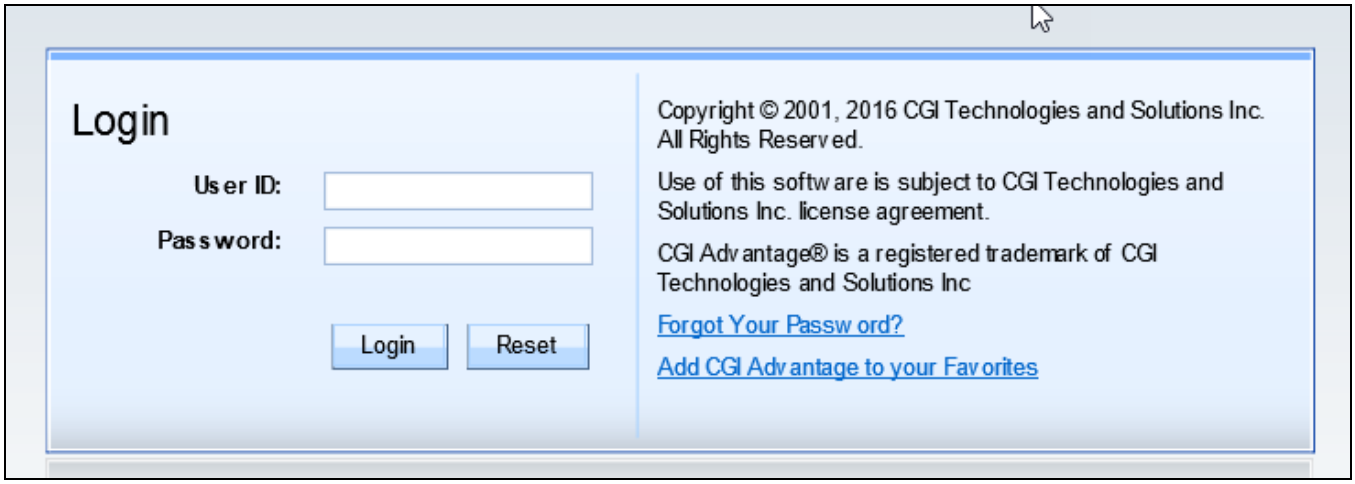
Changes and Improvements – Mostly the Same

Users will not notice major changes to the eMARS data. Data as of July 5, 2018 will be in eMARS 3.11. Historical document and table records will exist in eMARS 3.10. Basic Navigation is mostly unchanged. There may be some new functionality that will be covered in other training courses.

- Same color scheme, more contrast
- Same Larger font
- Same Collapsible Navigation Bar
- Same Document and Table navigation
- Jump To – still available
- Vendor Transaction History Table- still available

Logging In

Users will access eMARS 3.11 via a new URL, https://emars311.ky.gov with their same User ID and password.

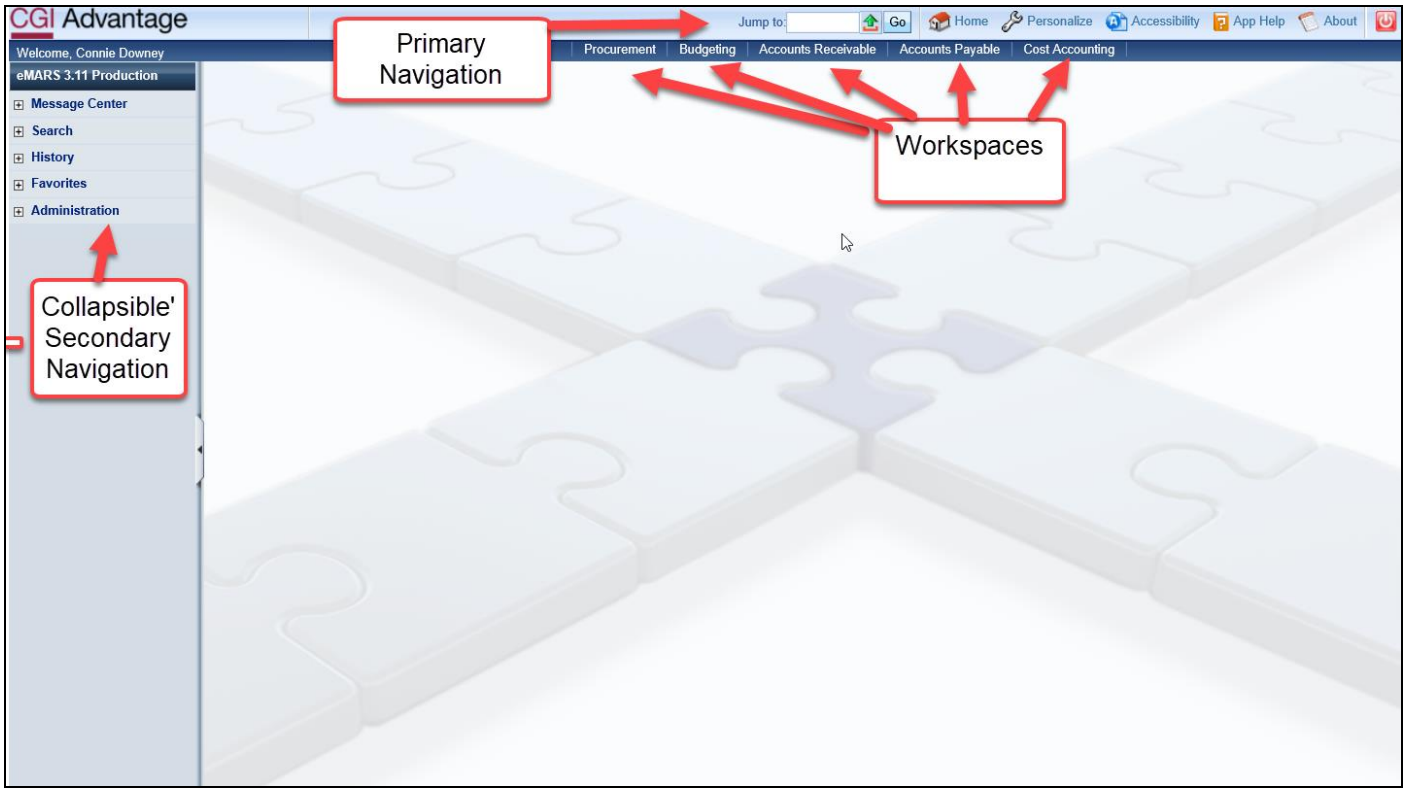


NOTE: Once the User is successfully logged into eMARS, they can set up the criteria questions to enable themselves to reset their own eMARS passwords. The instructions are under the eMARS "How To Tips" section.

https://finance.ky.gov/services/statewideacct/Pages/eMARS-3.10-Materials-and-Tutorials.aspx

2 – Basic Navigation

Users will find little change in primary and secondary navigation. Current page codes, document codes, favorites will all remain the same. Workspaces may change some depending on new functionality utilized by functional area.



Primary Navigation

The Primary Navigation bar is always visible and includes useful tools like the *Jump To* feature, *Home* link and *Log Out* button.

Jump To

The *Jump To* feature allows users "jump" or "leaf" to other pages without having to abandon the current document or page. Other notable points include:

- Must know the exact Page Code or use pick list to locate page
- Context Sensitive – will transition to data on "target" page based upon data on "source" page
  - Example: Fund Table opens to fund present on document
- Leafing history retains last 5 pages
  - *Back* link will navigate to the previous page/leaf

- Neither data or position within document or page is lost

- Auto-Transition to Budget Lines – in most circumstances, the *Jump To* will transition to the specific budget line on the budget inquiry page provided all required chart of account elements are present

Home

The *Home* link will navigate the user back to the opening home page from within any document or page. Please be aware that the source document or page will no longer be visible after clicking the *Home* link. However, these can be retrieved from *History*.

Personalize

The *Personalize* option provides the ability to organize Favorites.

Accessibility

Advantage Financial contains built-in accessibility features to support the Federal Governments Section 508 requirements.

App Help

The *App Help* link opens a help page where users can locate information regarding all functional areas. Please note this information is not Kentucky specific.

About

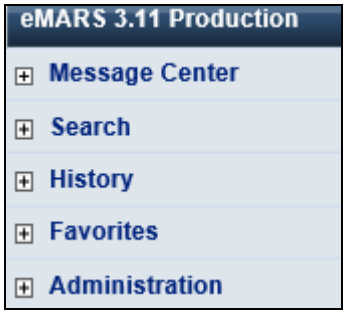
The About links provides AMS Advantage Financial Application Version Number. Upon go live Kentucky's application version number will be 3.9.0.0.

Log Out

The Log Out button will properly log the user out of the application.

Secondary Navigation

The Secondary Navigation panel allows users to navigate to multiple areas of eMARS, including Worklists, Table/Pages, Documents, and Broadcasts.



Message Center

The *Message Center* allows users to reach Worklists for document approval and retrieve printable PDFs (Forms) of documents. Forms are discusses in the Other Features section of this manual.

Search

The *Search* area contains Page Search, Document Catalog and link to infoAdvantage.

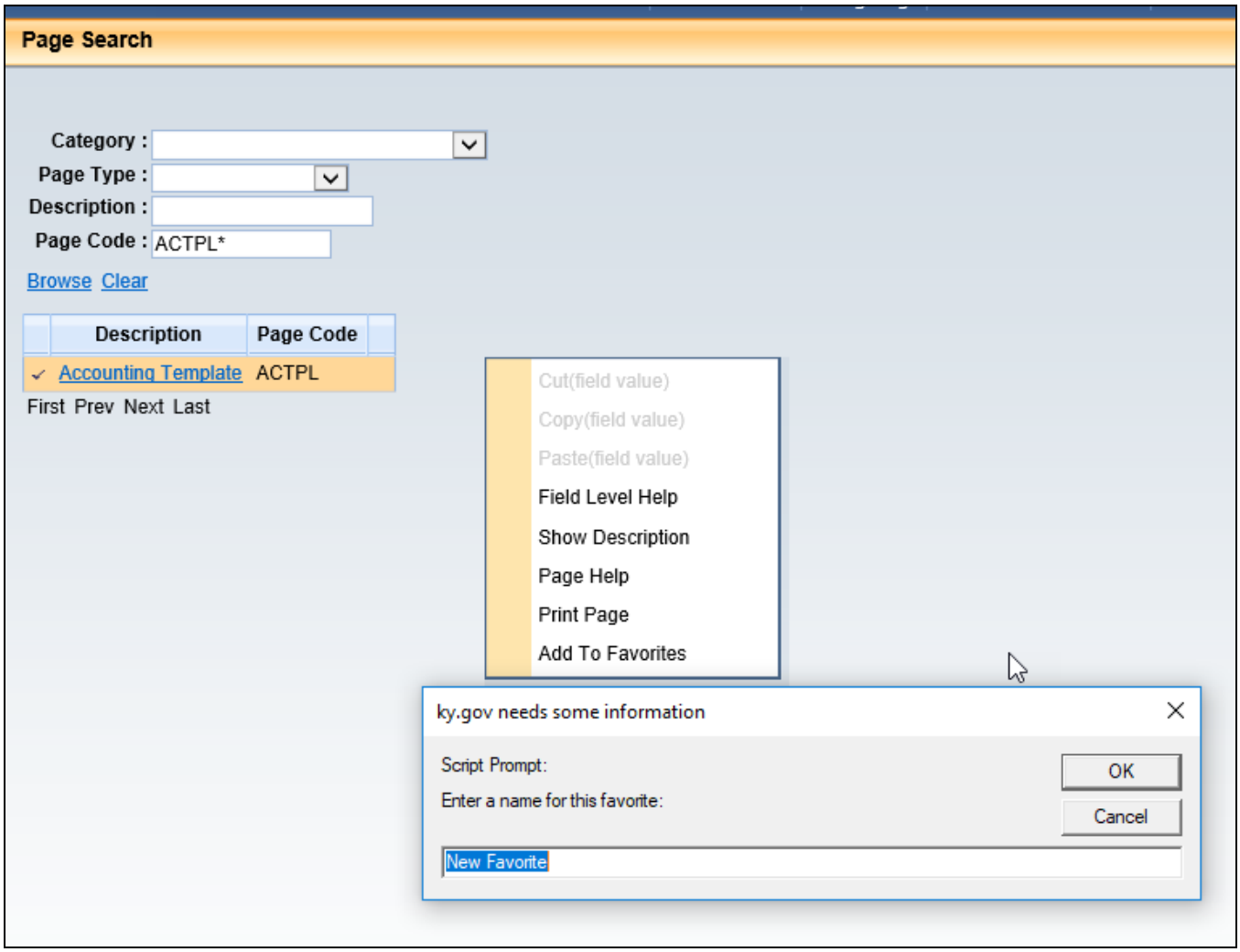
History

The *History* area contains a log of documents and tables/pages opened while working in eMARS.

Favorites

The *Favorites* area allows users to set frequently used tables/pages for easy access. To set a Favorite:

- Open the table/page you want to add.
- Right mouse click on the table/page
- Select *Add to Favorites*
- Name your “favorite”

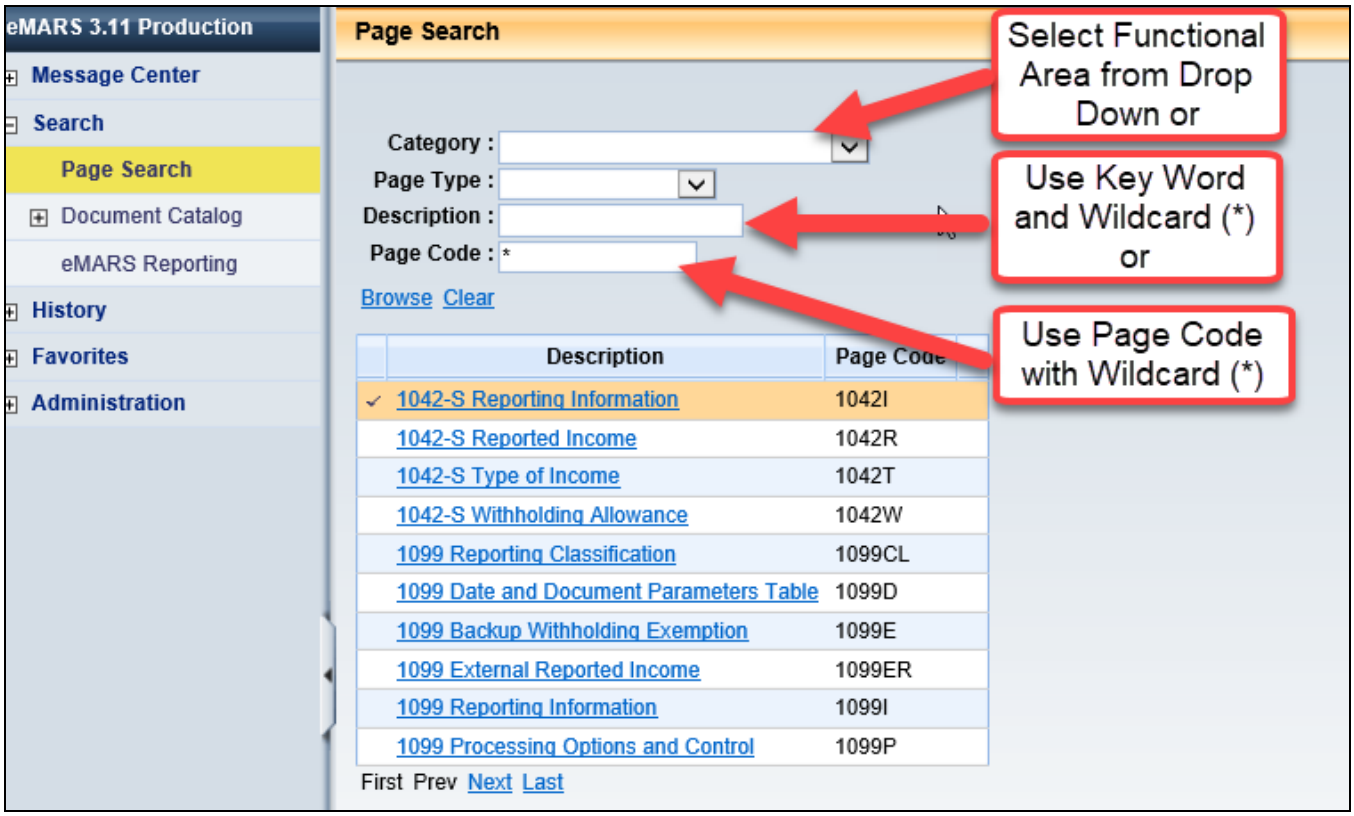


Administration

The Administration area provides the ability to manage your eMARS password. Please note that users will be automatically prompted to change their password every 90 days. Passwords must be between 8-16, alpha-numeric characters, contain at least one lower-case letter and one of the following special characters (period **.** at sign **@** pound sign **#** dollar sign **$** percent sign **%** hyphen **-**). Users must choose passwords that have not been used in the last 2 years.

3 – Table/Page Navigation

Tables/Pages are accessed through the *Page Search* within the *Search* area of *Secondary Navigation*. Users may enter the exact Page Code if known or use the Category and/or Description to search.

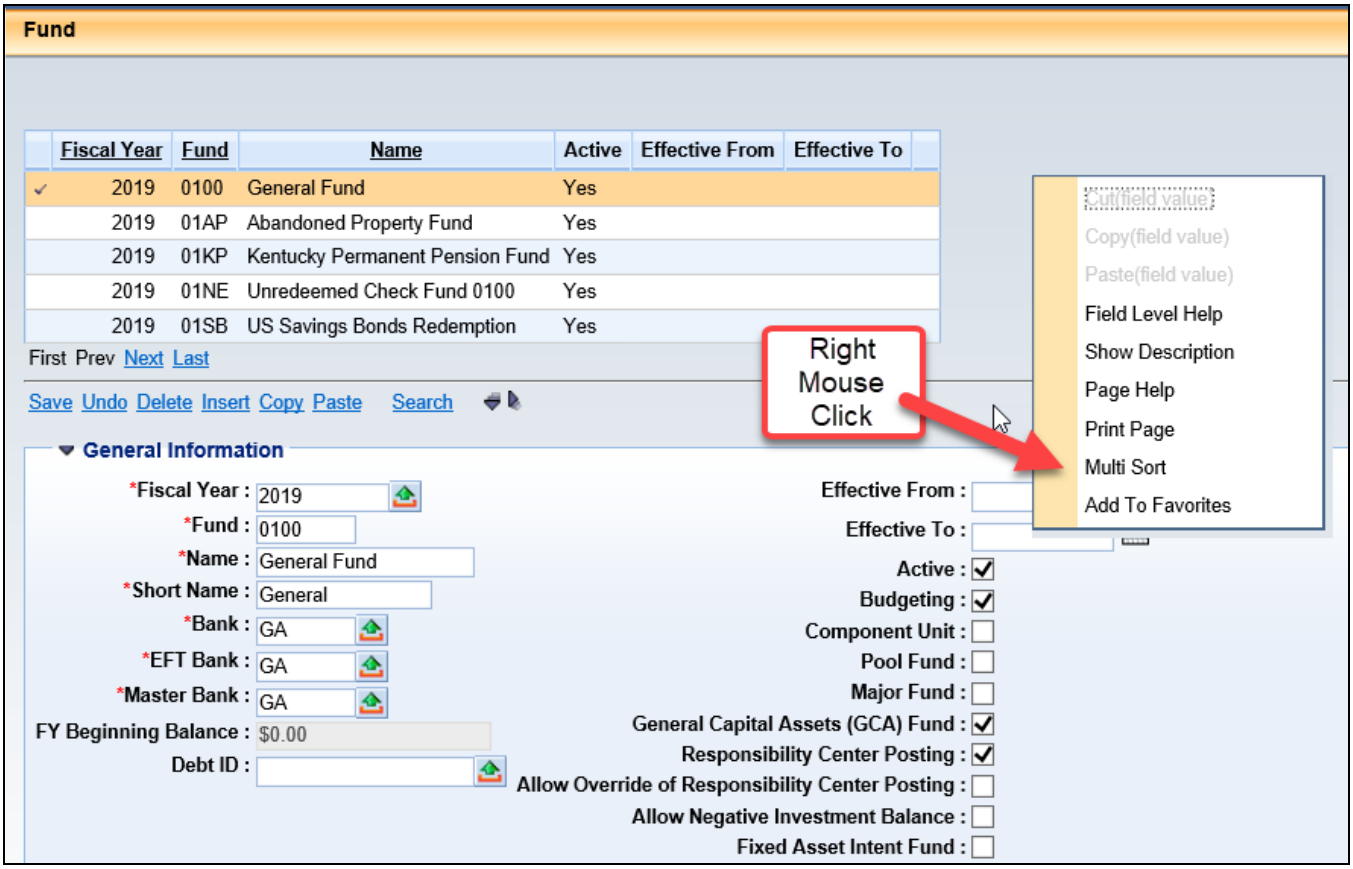


Multi-Sort

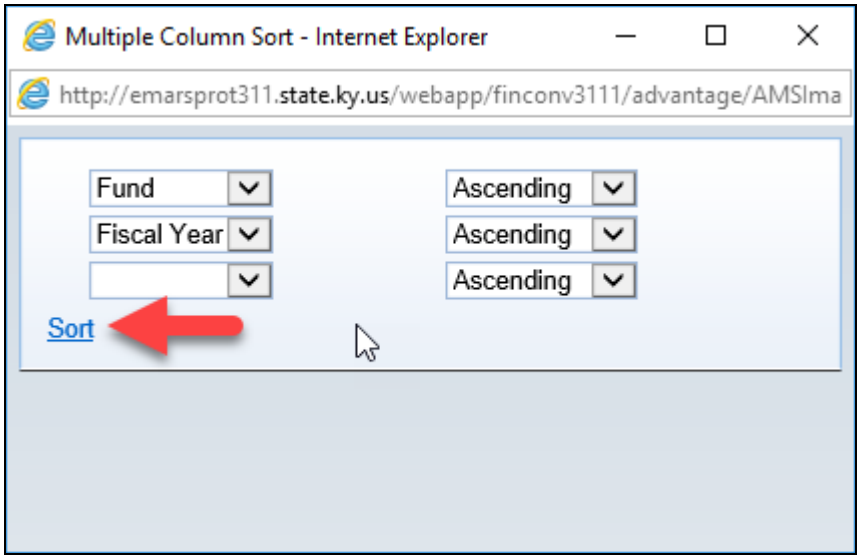
eMARS 3.11 tables have a multi-sort feature that provides sort options on multiple fields.

Notable points:

- Sortable fields are underlined
- Default sort is in column order
- Right-mouse click to select *Multi-Sort* option

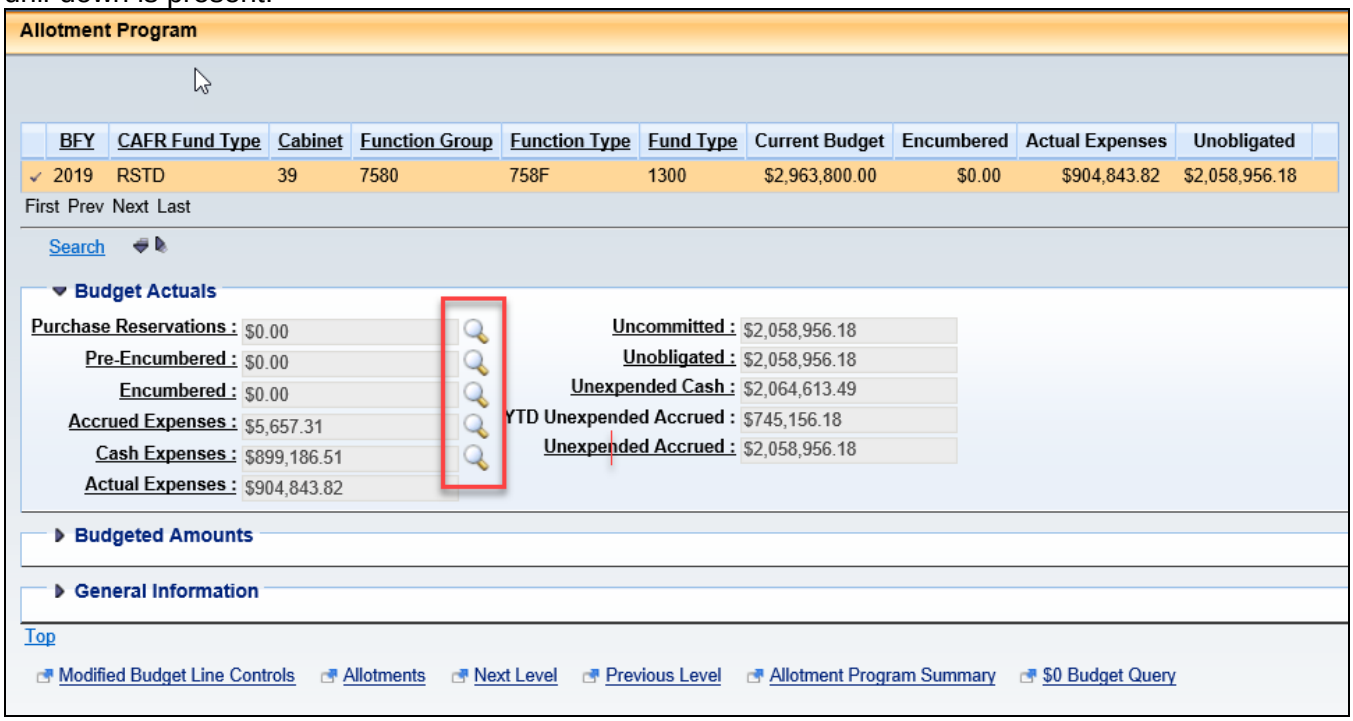


The multi-sort selection window appears. Select the new sort order and click Sort

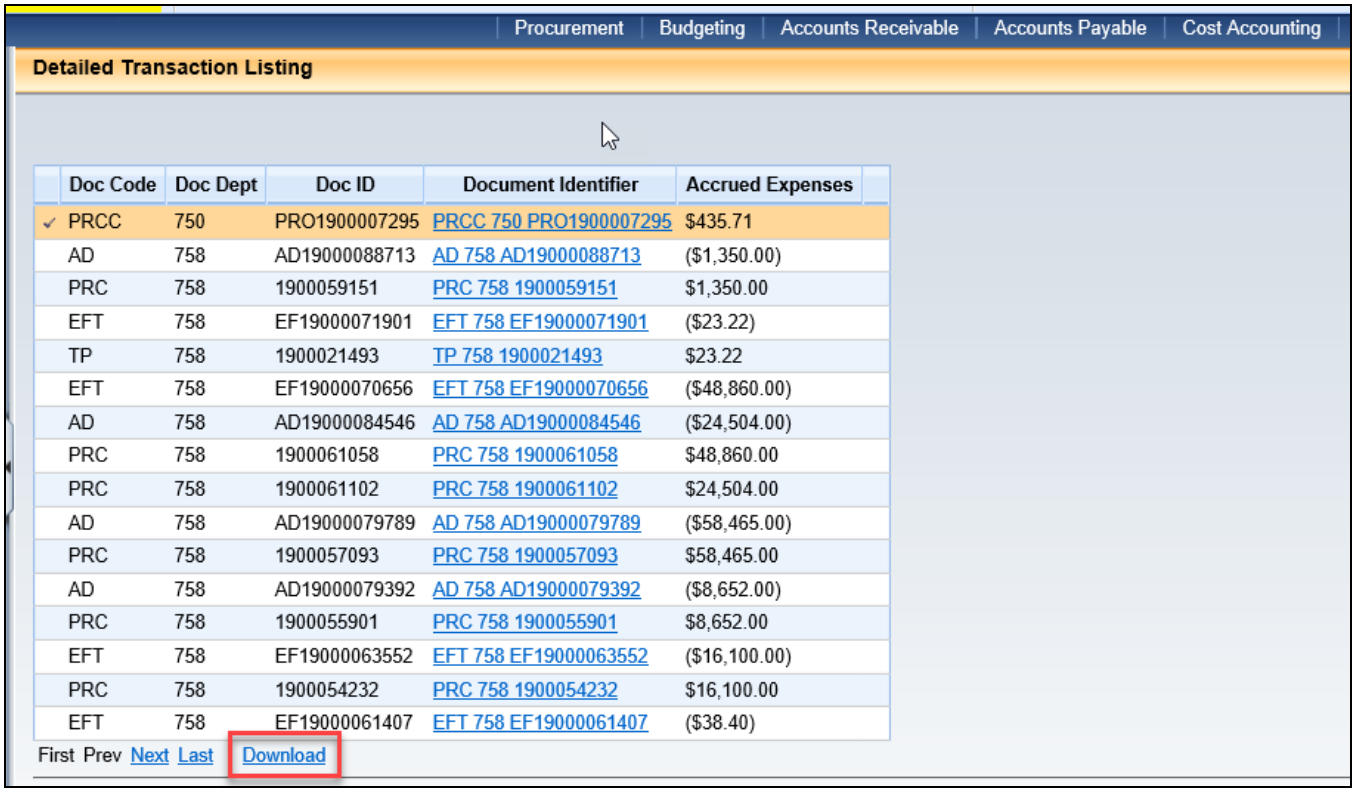


Drill Down and Export Functionality

Drill-down options are available on cash and budget inquiry tables. A *Magnifying Glass* is visible where drill-down is present.



When the *Magnifying Glass* is selected, a Detailed Transactions window opens with a listing of documents that makeup the corresponding value. The list is sorted by the most recent document to the oldest document.



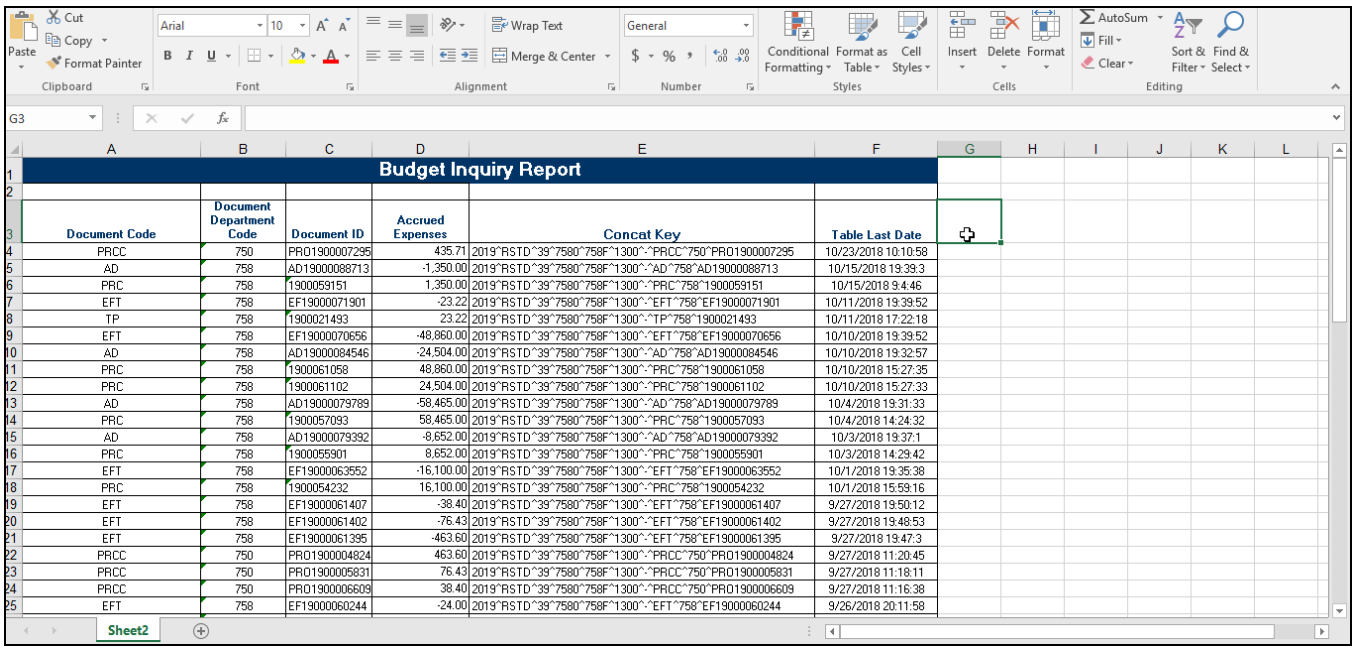
Procurement | Budgeting | Accounts Receivable | Accounts Payable | Cost Accounting

Detailed Transaction Listing

Doc Code	Doc Dept	Doc ID	Document Identifier	Accrued Expenses
✓ PRCC	750	PRO1900007295	PRCC 750 PRO1900007295	$435.71
AD	758	AD19000088713	AD 758 AD19000088713	($1,350.00)
PRC	758	1900059151	PRC 758 1900059151	$1,350.00
EFT	758	EF19000071901	EFT 758 EF19000071901	($23.22)
TP	758	1900021493	TP 758 1900021493	$23.22
EFT	758	EF19000070656	EFT 758 EF19000070656	($48,860.00)
AD	758	AD19000084546	AD 758 AD19000084546	($24,504.00)
PRC	758	1900061058	PRC 758 1900061058	$48,860.00
PRC	758	1900061102	PRC 758 1900061102	$24,504.00
AD	758	AD19000079789	AD 758 AD19000079789	($58,465.00)
PRC	758	1900057093	PRC 758 1900057093	$58,465.00
AD	758	AD19000079392	AD 758 AD19000079392	($8,652.00)
PRC	758	1900055901	PRC 758 1900055901	$8,652.00
EFT	758	EF19000063552	EFT 758 EF19000063552	($16,100.00)
PRC	758	1900054232	PRC 758 1900054232	$16,100.00
EFT	758	EF19000061407	EFT 758 EF19000061407	($38.40)

First Prev Next Last Download

Selected tables/pages have a *Download* link available which exports the drill-down or search results into MS Excel. Simply click the link and the search results open in MS Excel.



Budget Inquiry Report

Document Code	Document Department Code	Document ID	Accrued Expenses	Concat Key	Table Last Date
PRCC	750	PRO1900007295	435.71	2019^RSTD^39^7580^758F^1300^-^PRCC^750^PRO1900007295	10/23/2018 10:10:58
AD	758	AD19000088713	-1,350.00	2019^RSTD^39^7580^758F^1300^-^AD^758^AD19000088713	10/15/2018 19:39:3
PRC	758	1900059151	1,350.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900059151	10/15/2018 9:4:46
EFT	758	EF19000071901	-23.22	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000071901	10/11/2018 19:39:52
TP	758	1900021493	23.22	2019^RSTD^39^7580^758F^1300^-^TP^758^1900021493	10/11/2018 17:22:18
EFT	758	EF19000070656	-48,860.00	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000070656	10/10/2018 19:39:52
AD	758	AD19000084546	-24,504.00	2019^RSTD^39^7580^758F^1300^-^AD^758^AD19000084546	10/10/2018 19:32:57
PRC	758	1900061058	48,860.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900061058	10/10/2018 15:27:35
PRC	758	1900061102	24,504.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900061102	10/10/2018 15:27:33
AD	758	AD19000079789	-58,465.00	2019^RSTD^39^7580^758F^1300^-^AD^758^AD19000079789	10/4/2018 19:31:33
PRC	758	1900057093	58,465.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900057093	10/4/2018 14:24:32
AD	758	AD19000079392	-8,652.00	2019^RSTD^39^7580^758F^1300^-^AD^758^AD19000079392	10/3/2018 19:37:1
PRC	758	1900055901	8,652.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900055901	10/3/2018 14:29:42
EFT	758	EF19000063552	-16,100.00	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000063552	10/1/2018 19:35:38
PRC	758	1900054232	16,100.00	2019^RSTD^39^7580^758F^1300^-^PRC^758^1900054232	10/1/2018 15:59:16
EFT	758	EF19000061407	-38.40	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000061407	9/27/2018 19:50:12
EFT	758	EF19000061402	-76.43	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000061402	9/27/2018 19:48:53
EFT	758	EF19000061395	-463.60	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000061395	9/27/2018 19:47:3
PRCC	750	PRO1900004824	463.60	2019^RSTD^39^7580^758F^1300^-^PRCC^750^PRO1900004824	9/27/2018 11:20:45
PRCC	750	PRO1900005831	76.43	2019^RSTD^39^7580^758F^1300^-^PRCC^750^PRO1900005831	9/27/2018 11:18:11
PRCC	750	PRO1900006609	38.40	2019^RSTD^39^7580^758F^1300^-^PRCC^750^PRO1900006609	9/27/2018 11:16:38
EFT	758	EF19000060244	-24.00	2019^RSTD^39^7580^758F^1300^-^EFT^758^EF19000060244	9/26/2018 20:11:58

Sheet2

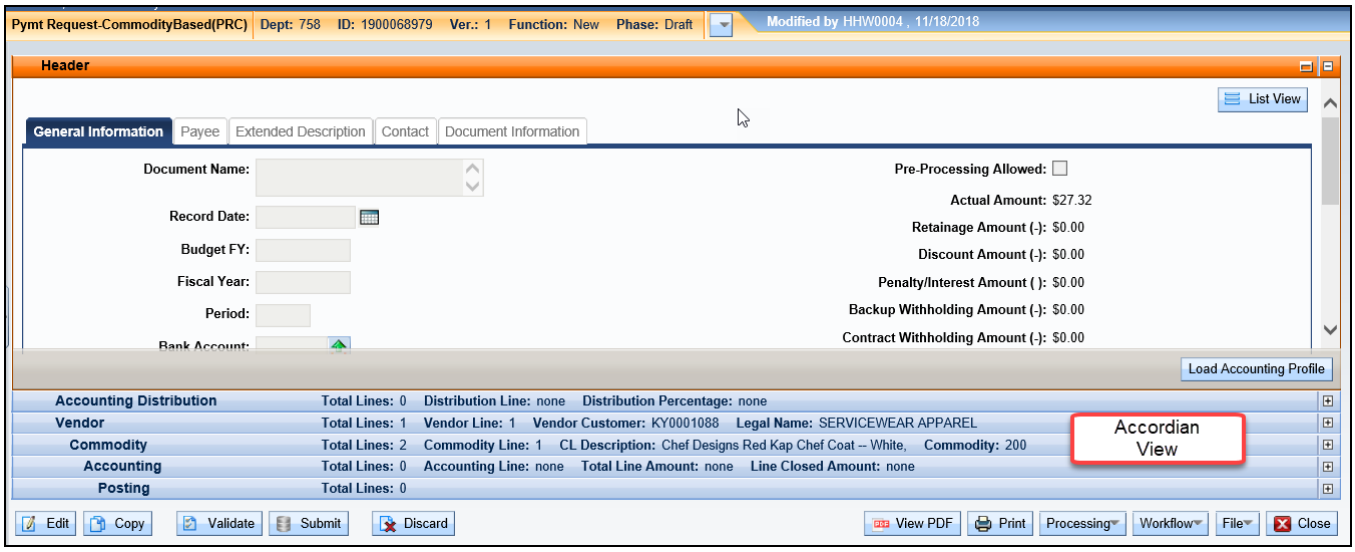
4 – Document Navigation

Documents are located via the Document Catalog. Document navigation within eMARS 3.11 gives users options and permits a larger work space for document entry.

Accordion View vs. Document Navigator

The *Accordion View* was the new option for navigation in the previous version and is still present in 3.11.

All documents will open to the Accordion View. However, the *Document Navigator* is still accessible from within the document itself.

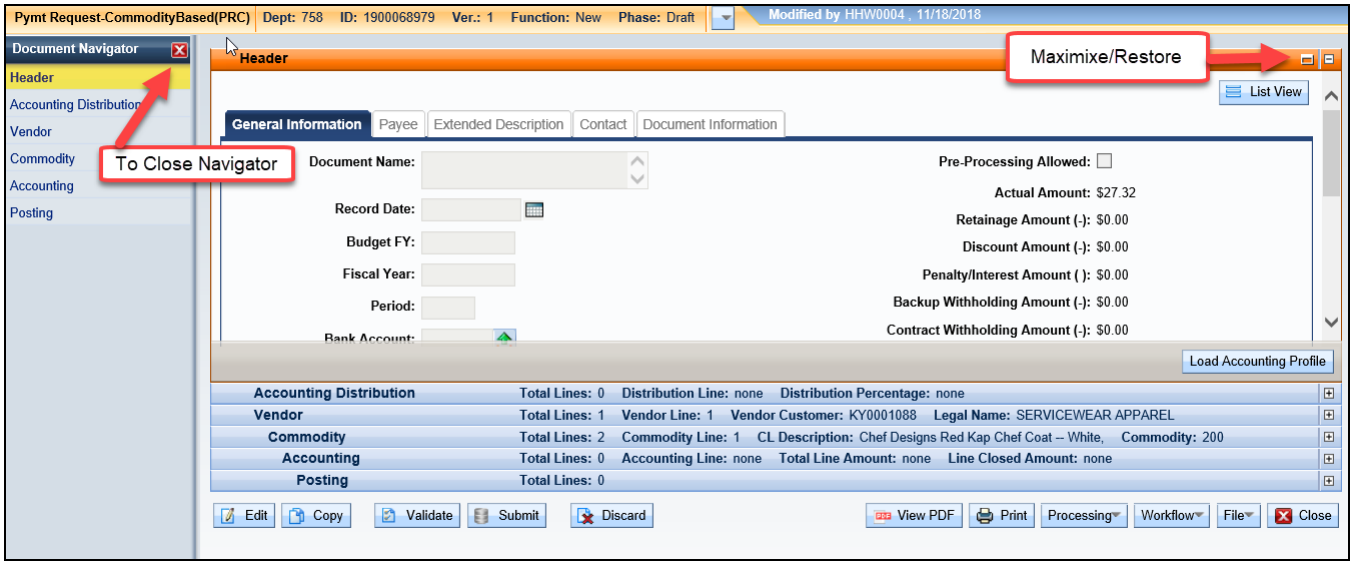


Notable point regarding the Accordion View:

- Accordion (section) is expandable via the sign
  - Documents will open with the Header expanded
- Accordion provides high level detail regarding the section
- Indentions represent Parent/Child relationship

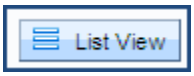
For users who prefer to navigate using the *Document Navigator*, simply open the navigator using the arrow visible from the far left side of the window.

The navigator will open with the same sections as shown via the accordions. Please note that the accordions do not disappear and can still be used for navigation purposes. The Document Navigator can be closed via the red X. The Maximize/Restore icon can be used to maximize each section in order to provide the most work space for data entry.

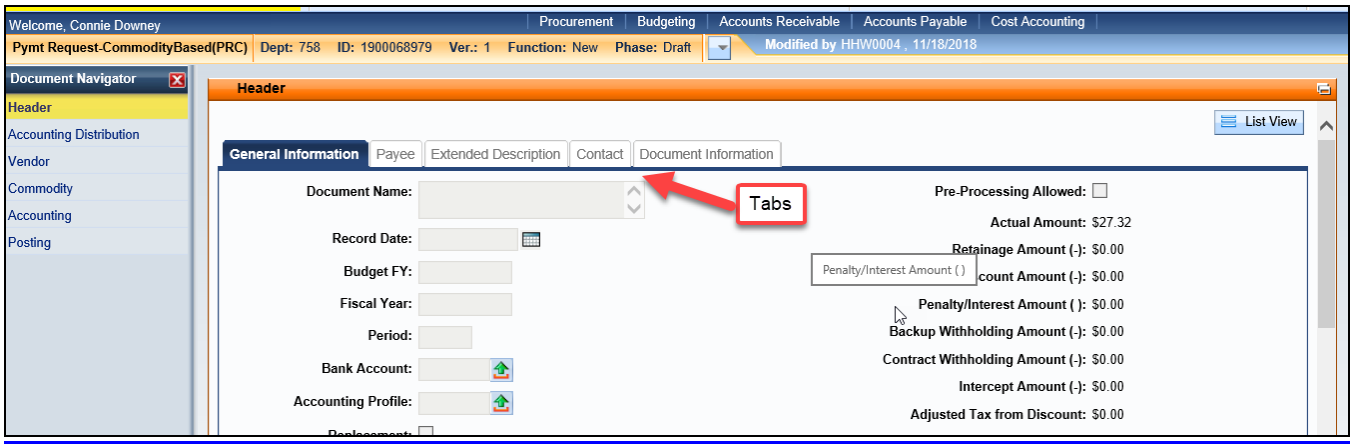


Tab View vs. List View

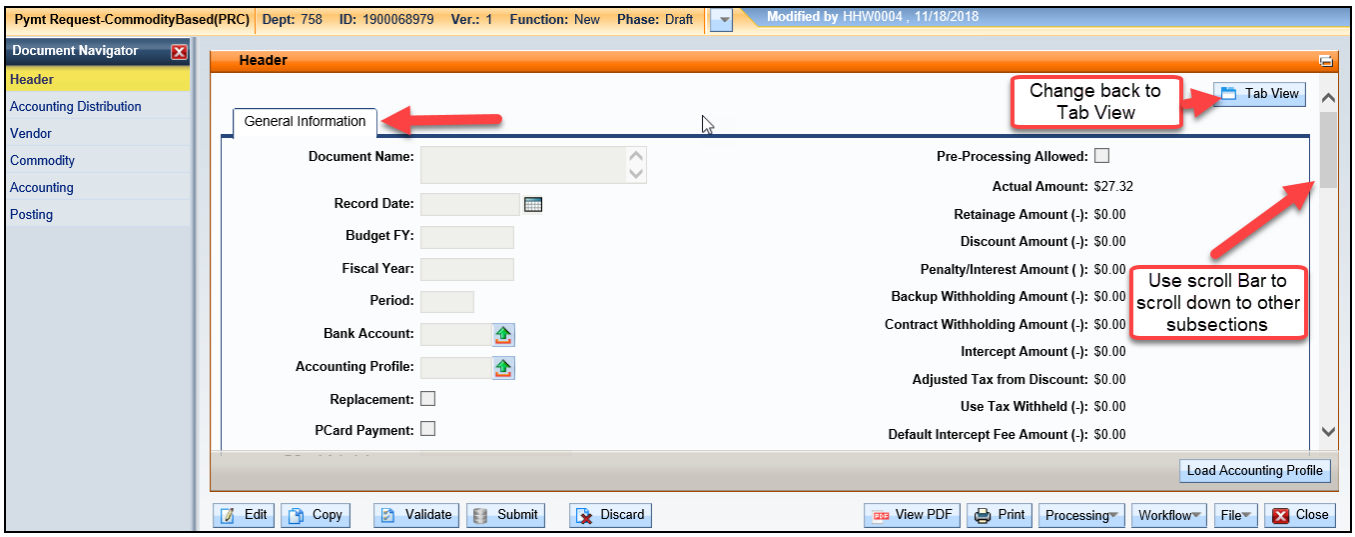
Another navigational option is to move between document sub-sections using either the *Tab View* or *List View*. Each document will open up using the *Tab View*. Users can open the *List View* by clicking the *List View* button in the top right corner of the documents.



Tab View

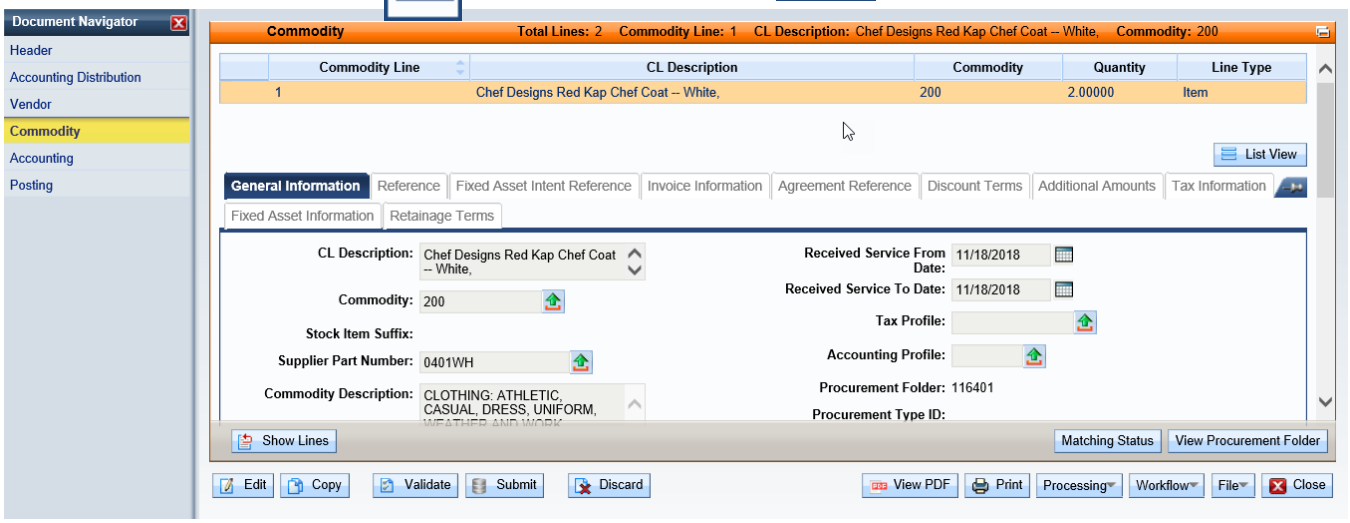


List View



Details or No Details

Using the *Details* option is another good way to maximize your screen viewing as it only shows one line of information at a time within each section. This option is good for multi-line documents. Use the "push-pin" to open *Details*. Then Use the "eye" to expand the details.

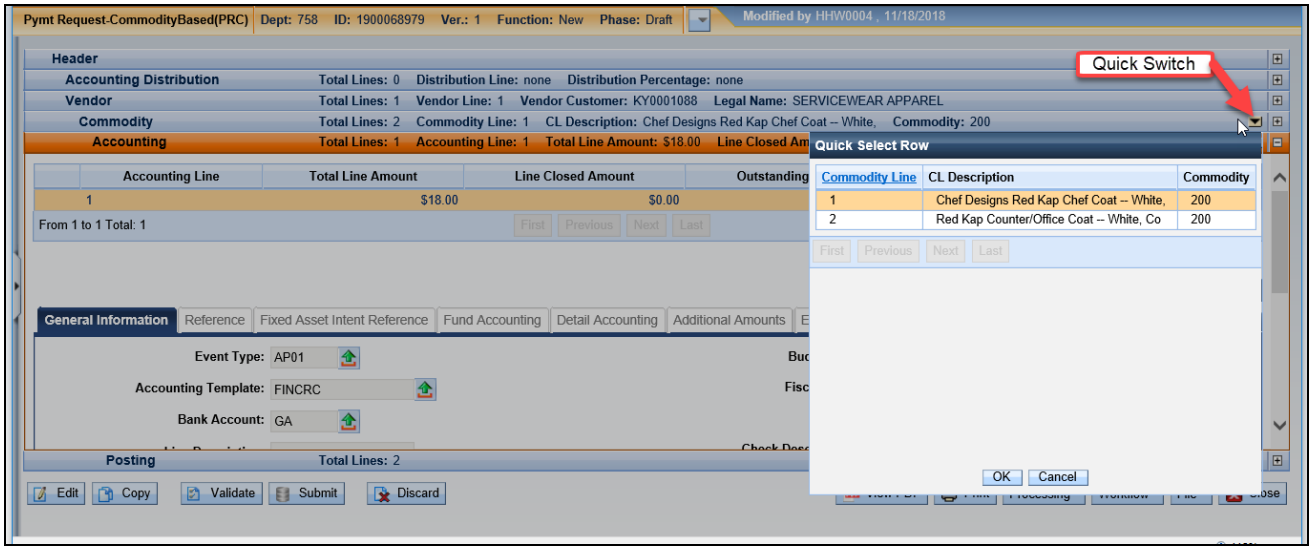


Select the "push-pin" again to view all lines

Other Document Features

Quick Switch

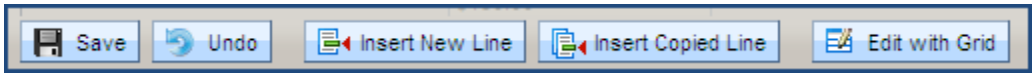
The *Quick Switch* feature allows users to move at the "child" level between "parents". For example, while within the Accounting section for commodity line 1, the *Quick Switch* feature can be used to switch to commodity line 2 while still within the Accounting section.



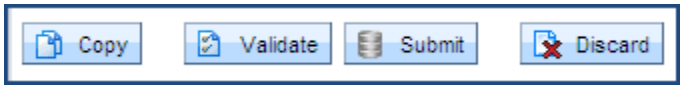
Buttons

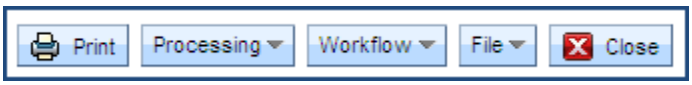
Display buttons will vary based on the document status, accordion and the details setting.

Accordion specific buttons include:



Document buttons are always in view and include:





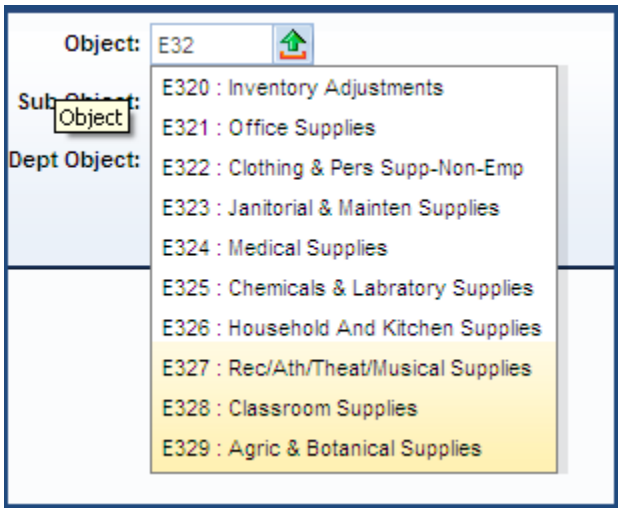
Users will find common functions currently used are now in the form of buttons rather than links and may be in different locations on the document.

Pick Lists

Users will find many more "pick lists" available on documents. "Pick-lists" are represented by a green arrow icon. Clicking on the icon will open up the respective reference table. "Pick-lists" are available throughout each document and now available for every chart of account element.

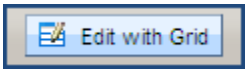
Type Ahead

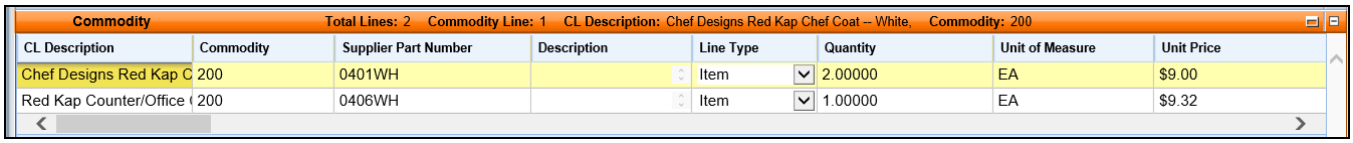
The Type Ahead feature is available on most fields. It provides letter by letter filtering on selected fields. For instance, when searching for an object code, type in the Object field "E32" and Type Ahead will filter the object table for all entries beginning with "E32".



Edit With Grid

The Edit With Grid feature provides a "spreadsheet view" from within a particular document section as to provide easy data entry particularly for multi-line documents.

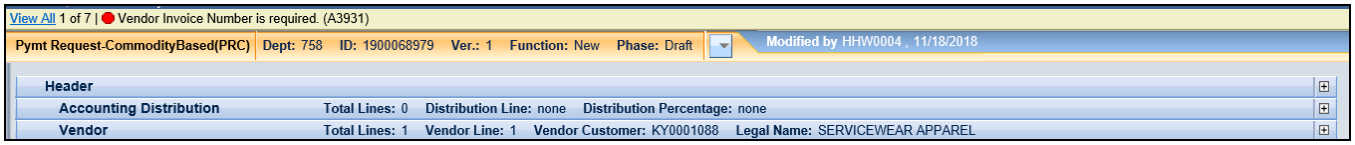




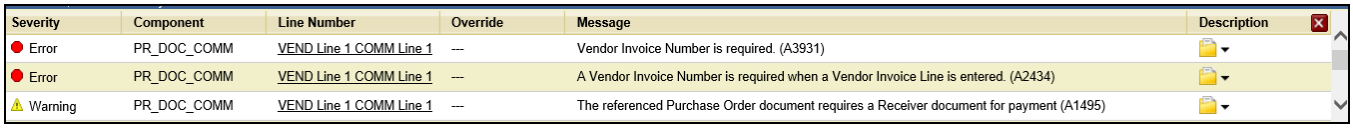
Use the Tab key to move from field to field.

Document Errors

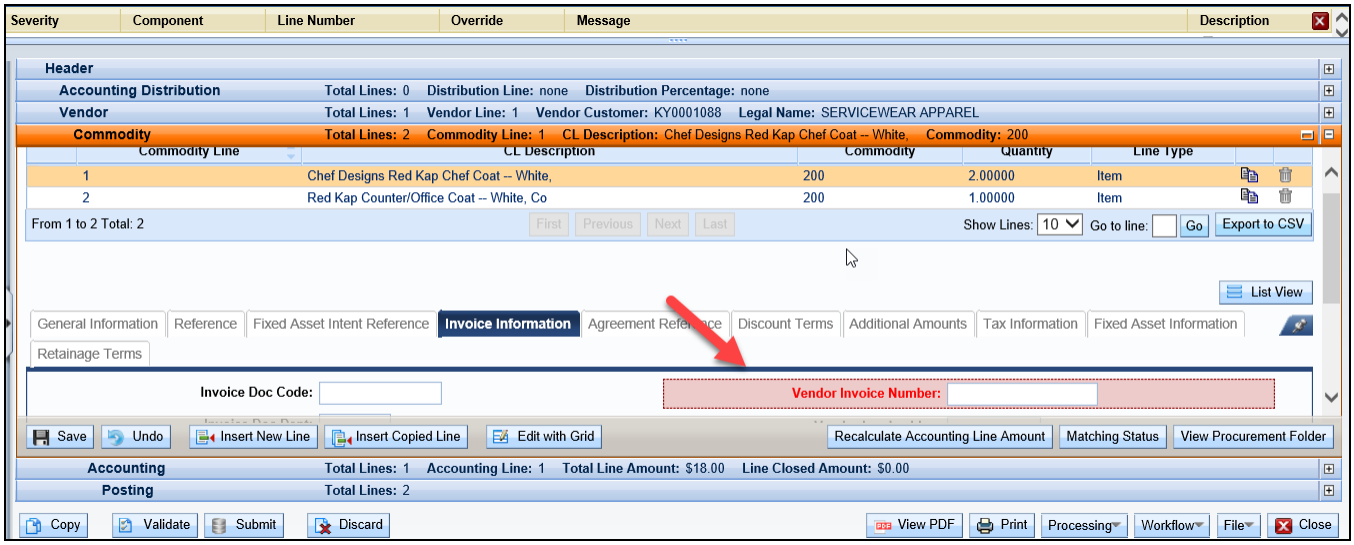
Document errors appear at the top of the document once it is validated. The error bar defaults to one line and shows the errors with the highest priority first (Severe, Error, Overridible, Warning, Information).



The error bar can be expanded by selecting *View All*, but it no longer opens a separate window.

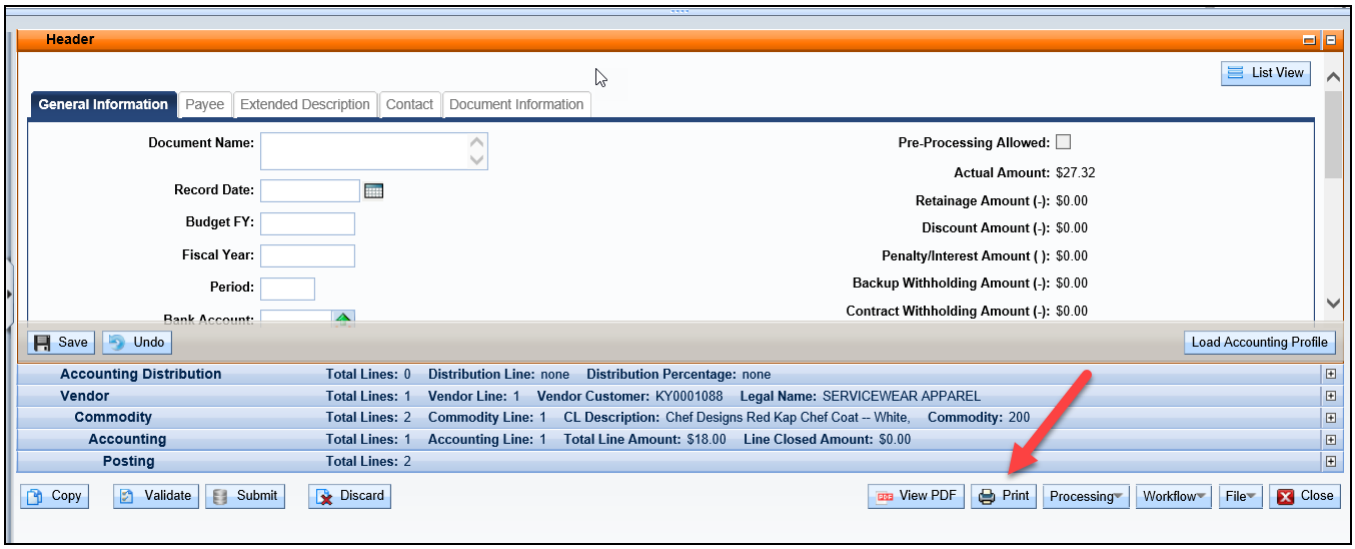


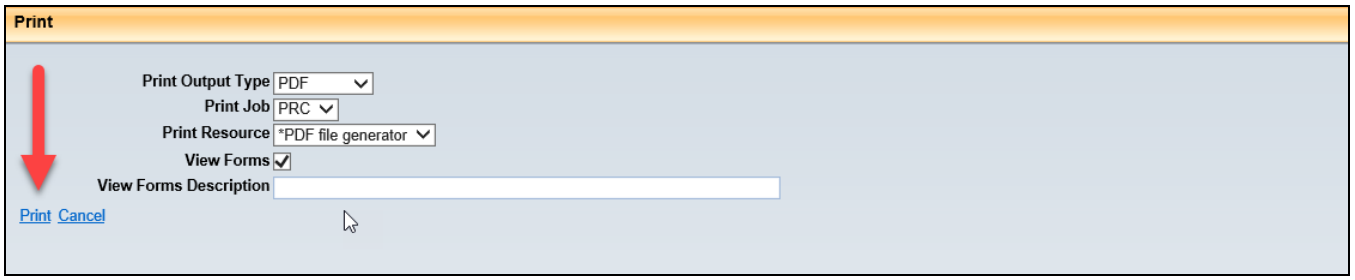
Selecting the location link will navigate to the problem area of the document.

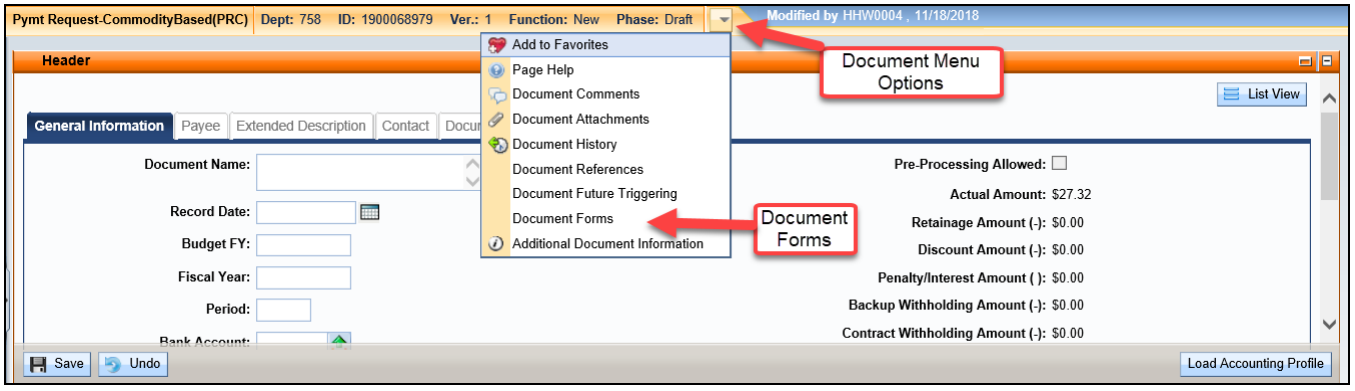


Printing

The Print button located on each document will generate a PDF within Document Forms provided a print form exists for the document.

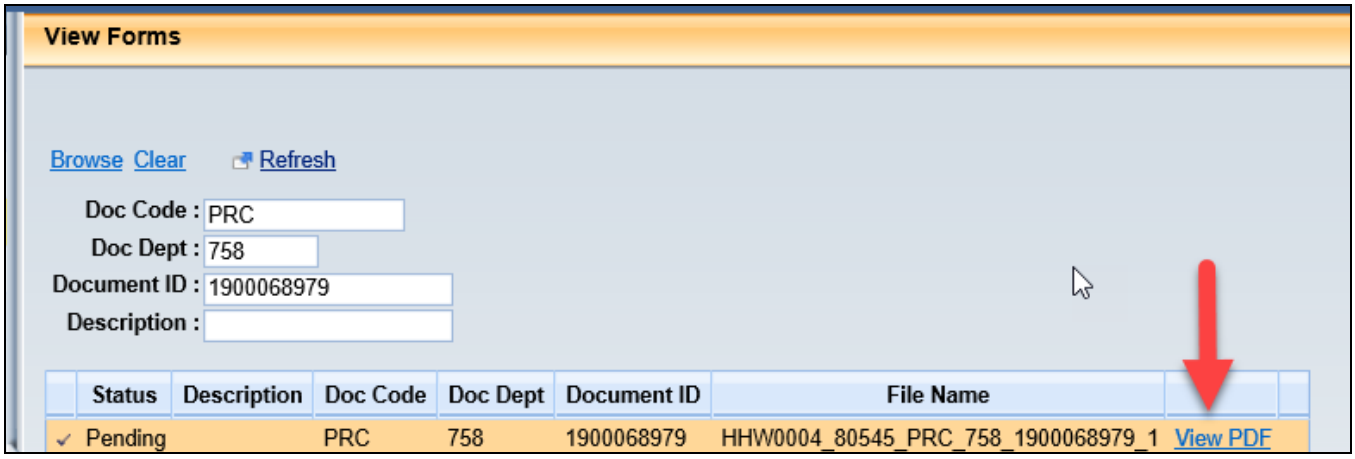






The PDF is found in Document Forms located within the document menu options.

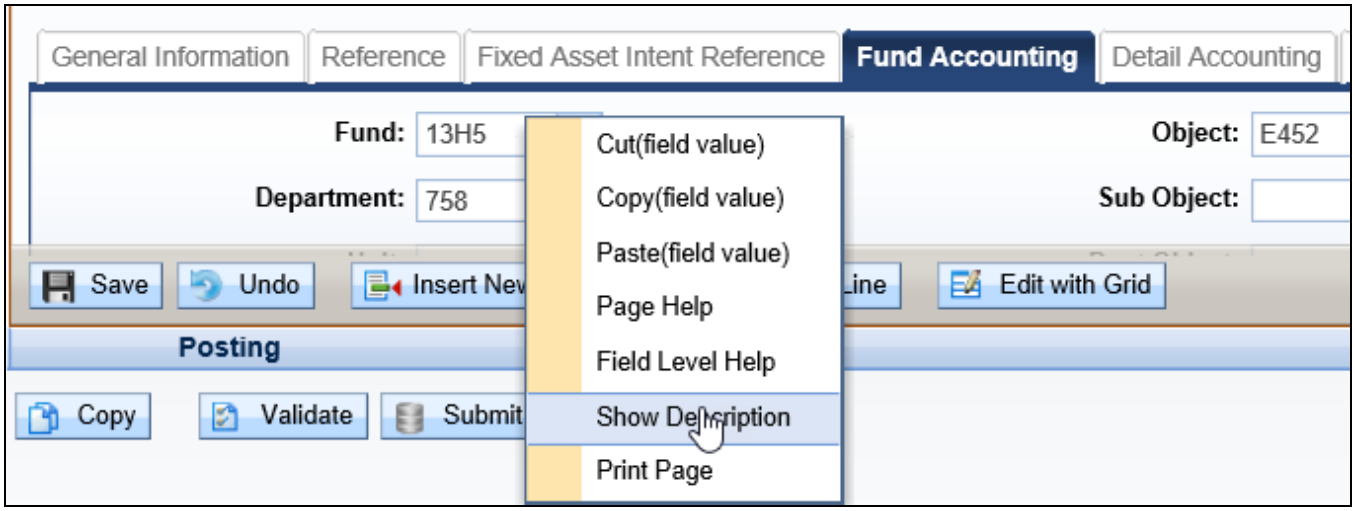
Open the PDF by clicking on *View PDF*.



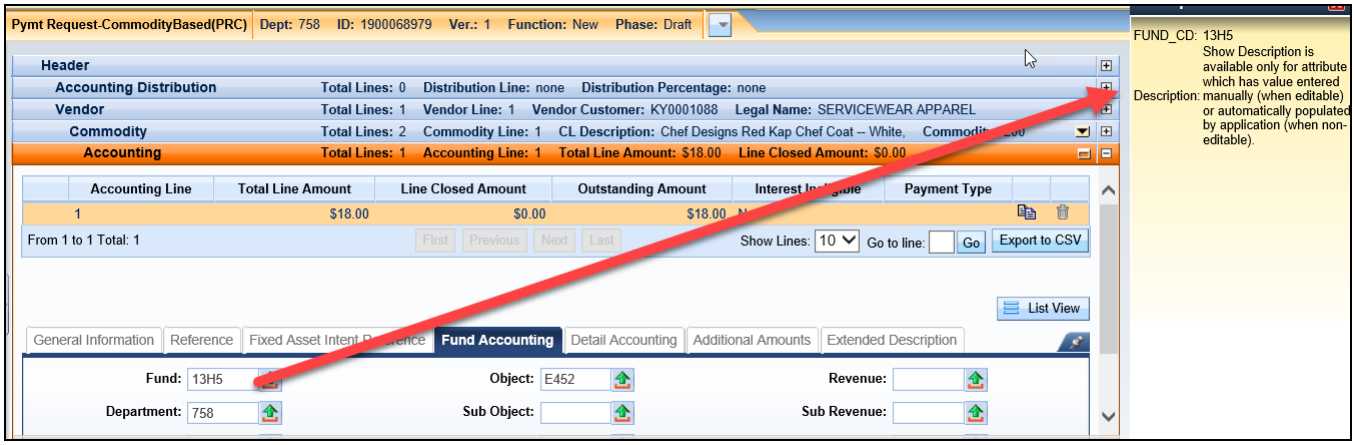
5 – Other Features

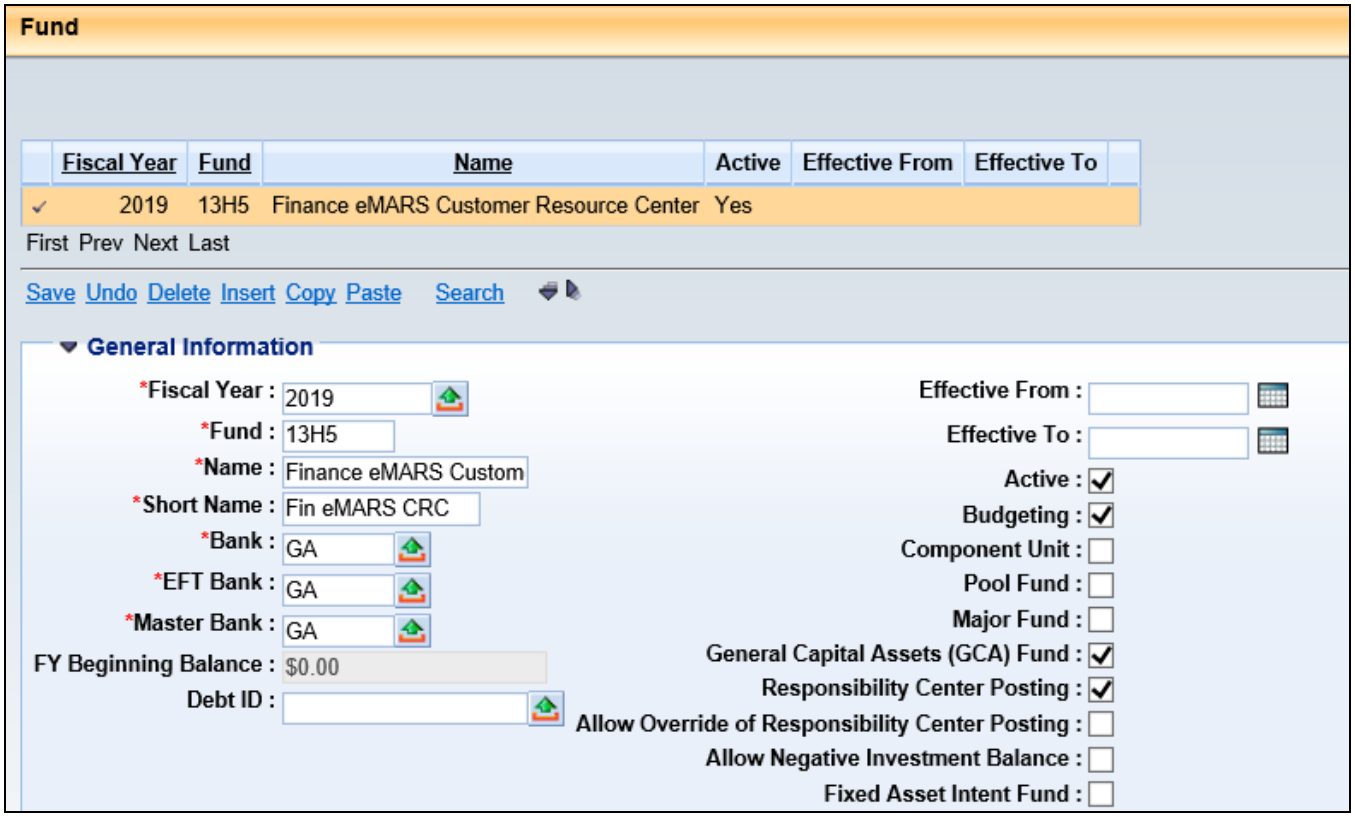
Show Description/Show Details

Select Show Description via right mouse click in any field with a populated value. A description of that value will appear.



Select *Show Details* from within the ”Description for” box and the related reference table will open to the exact value.

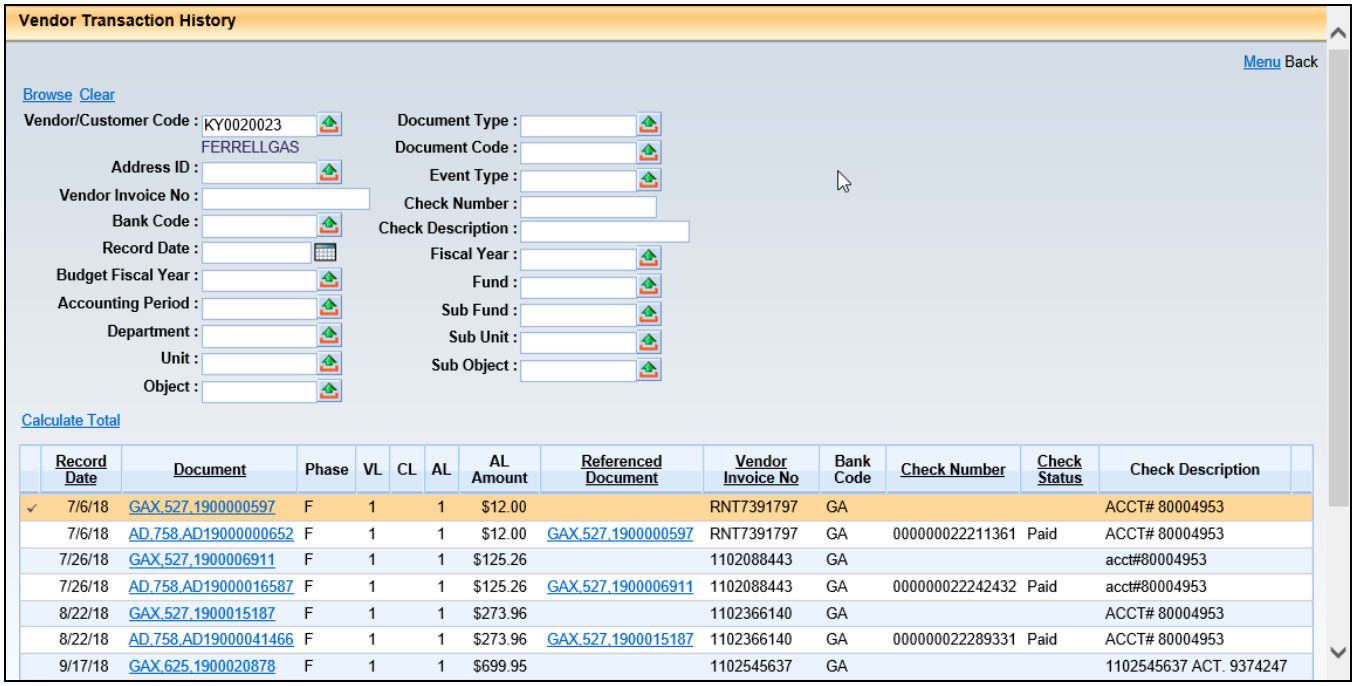




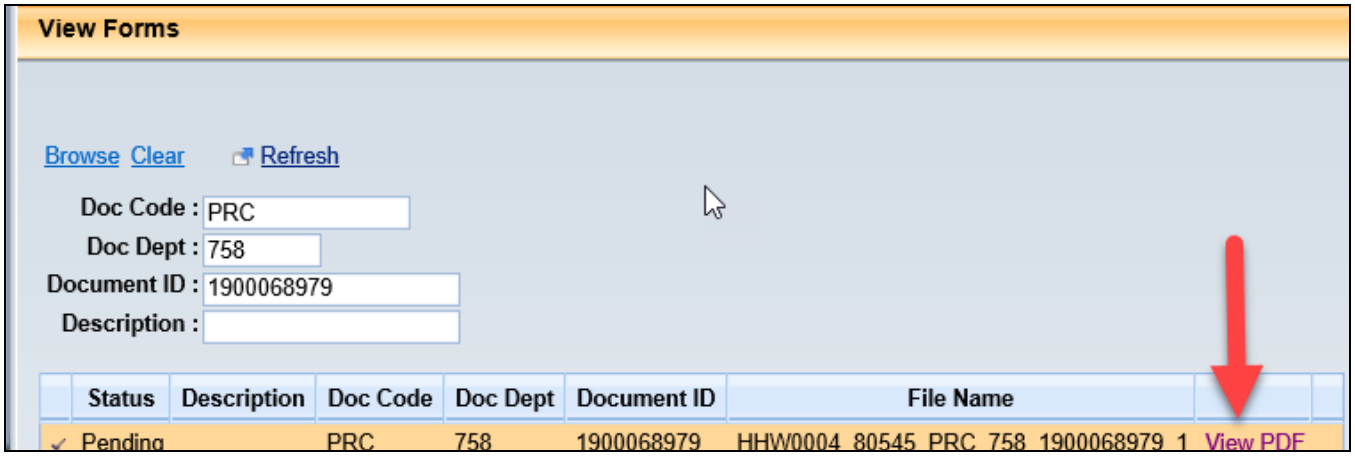
Vendor Transaction History

The Vendor Transaction History (VTH) table provides multiple ways to search vendor transactions. Notable points include:

- Multiple searchable fields
  - Narrow search as much as possible
- Links to other useful tables available
- Displays both accrued and cash expenditures
- Document links will open the document provided the user has security
- "Download" link available



Record Date	Document	Phase	VL	CL	AL	AL Amount	Referenced Document	Vendor Invoice No	Bank Code	Check Number	Check Status	Check Description
7/6/18	GAX,527,1900000597	F	1		1	$12.00		RNT7391797	GA			ACCT# 80004953
7/6/18	AD,758,AD19000000652	F	1		1	$12.00	GAX,527,1900000597	RNT7391797	GA	000000022211361	Paid	ACCT# 80004953
7/26/18	GAX,527,1900006911	F	1		1	$125.26		1102088443	GA			acct#80004953
7/26/18	AD,758,AD19000016587	F	1		1	$125.26	GAX,527,1900006911	1102088443	GA	000000022242432	Paid	acct#80004953
8/22/18	GAX,527,1900015187	F	1		1	$273.96		1102366140	GA			ACCT# 80004953
8/22/18	AD,758,AD19000041466	F	1		1	$273.96	GAX,527,1900015187	1102366140	GA	000000022289331	Paid	ACCT# 80004953
9/17/18	GAX,625,1900020878	F	1		1	$699.95		1102545637	GA			1102545637 ACT. 9374247

Forms

The Forms area from within the Message Center provides the ability to print a document form without having to open the document. Simply search for the Document ID within the Forms area and the PDF link is provided.