SMART

Statewide Management, Accounting and Reporting Tool

Training Guide – Travel & Expenses

Updating Department Approvers

State of Kansas

Travel & Expenses – Updating Department Approvers
Training Guide
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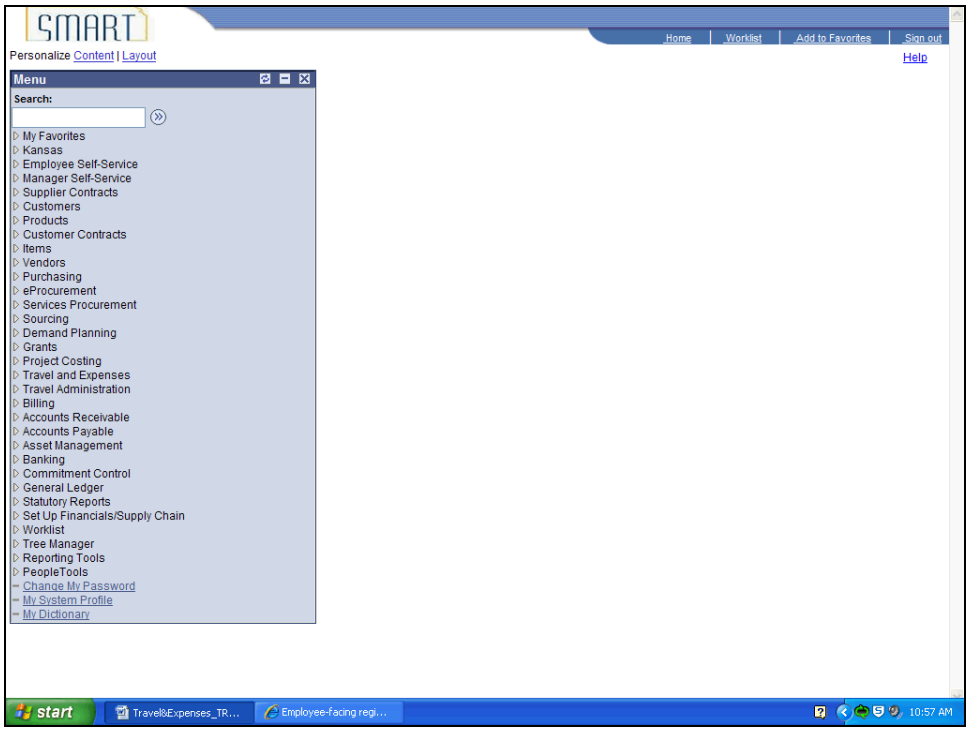
Updating Department Approvers

Procedure

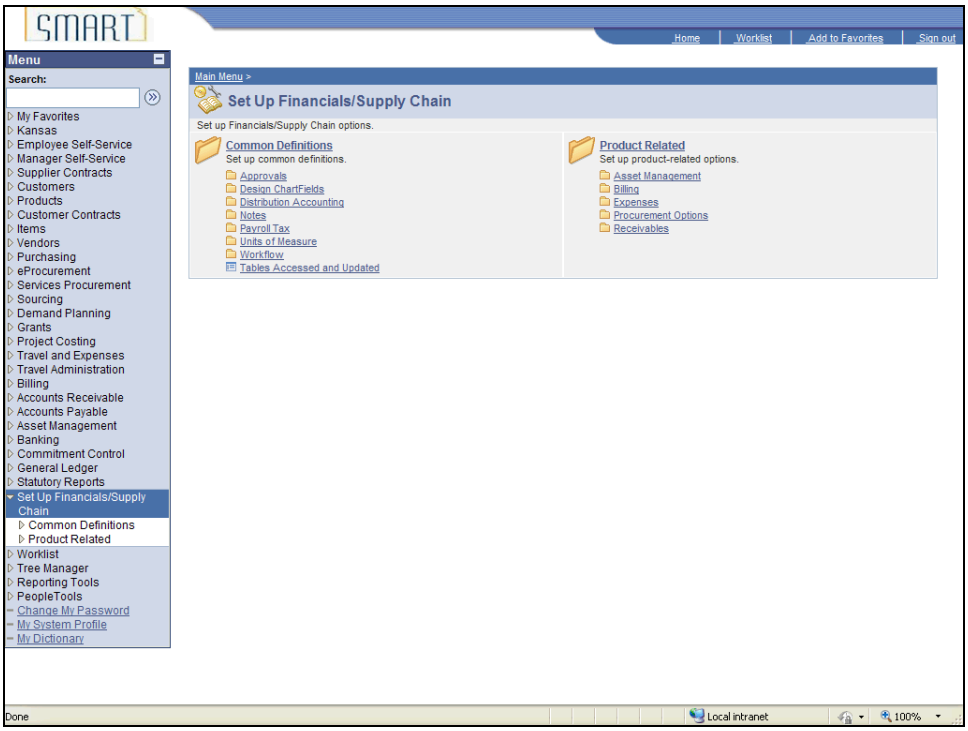
"Workflow Maintenance," as it pertains to SMART Travel & Expenses (T&E), is the process of setting up and keeping your agency's approval structure current. On occasion, changes in business processes or employee changes necessitate an agency add or remove the persons designated to approve travel expenses for other staff members. SMART refers to these department approvers as "Expense Managers."

Generally, an agency's T&E Maintainer or T&E Workflow Maintainer will update these roles.

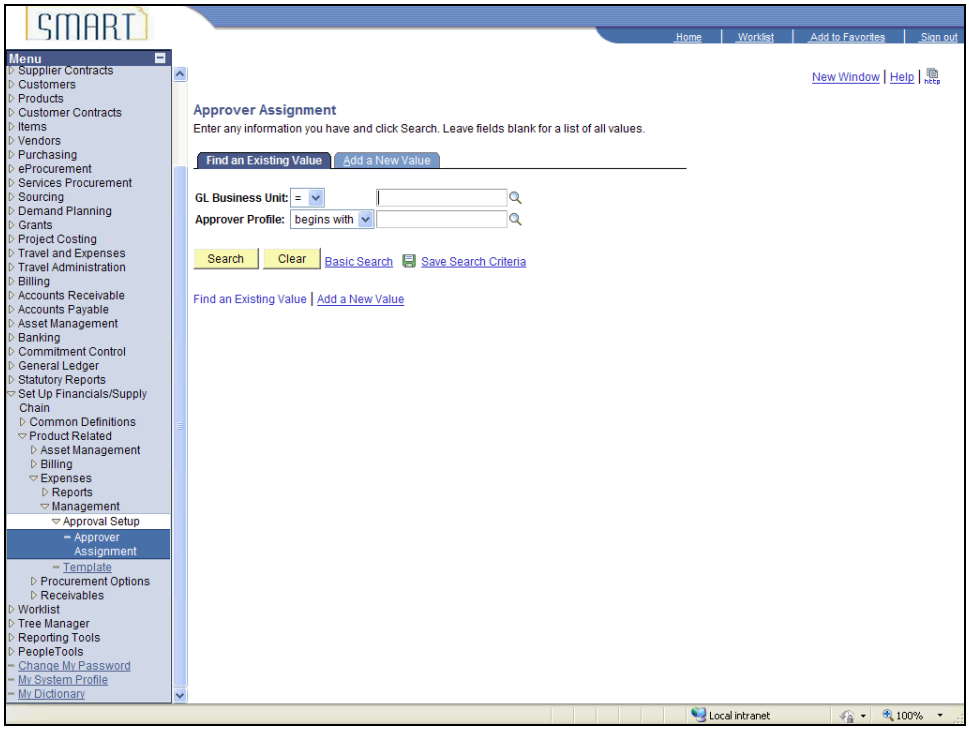
Step	Action
1.	Before updating the department approvers, you must know: • The User ID for the employee(s) to add as approvers for your department, and • The departments for which those individuals will approve.



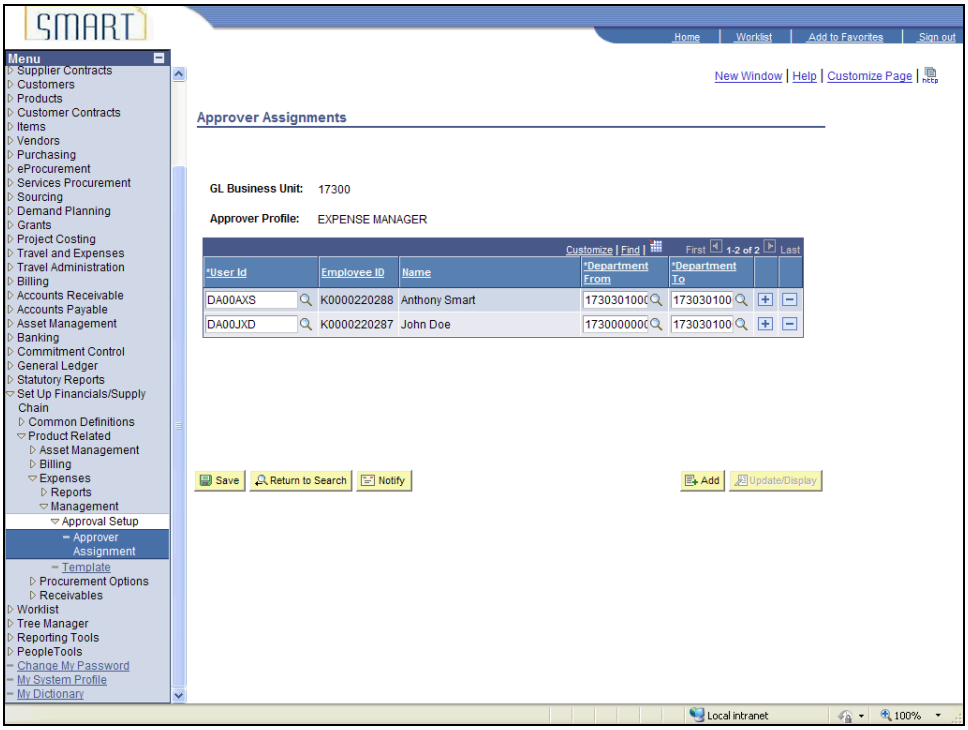
Step	Action
2.	You will process department approvers from the Set Up Financials/ Supply Chain link pages. You may need to scroll down on the page to find the link. Click the scrollbar.
3.	Click the **Set Up Financials/Supply Chain** link. Set Up Financials/Supply Chain



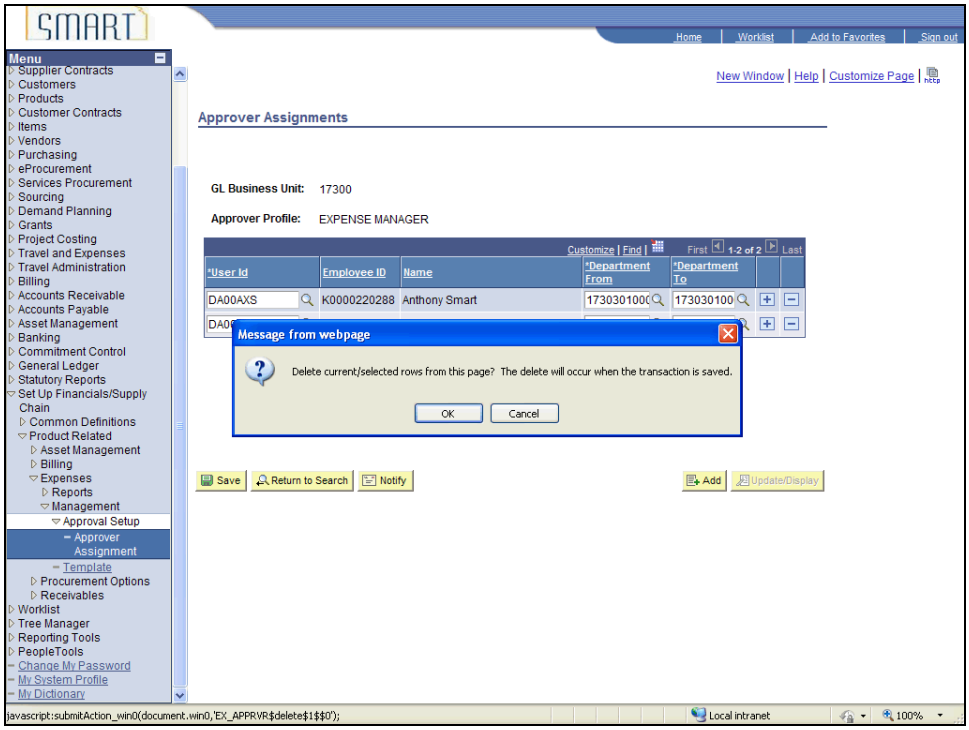
Step	Action
4.	Click the **Product Related** link. Product Related
5.	Click the **Expenses** link. Expenses
6.	Click the **Management** link. Management
7.	Click the **Approver Assignment** link. Approver Assignment



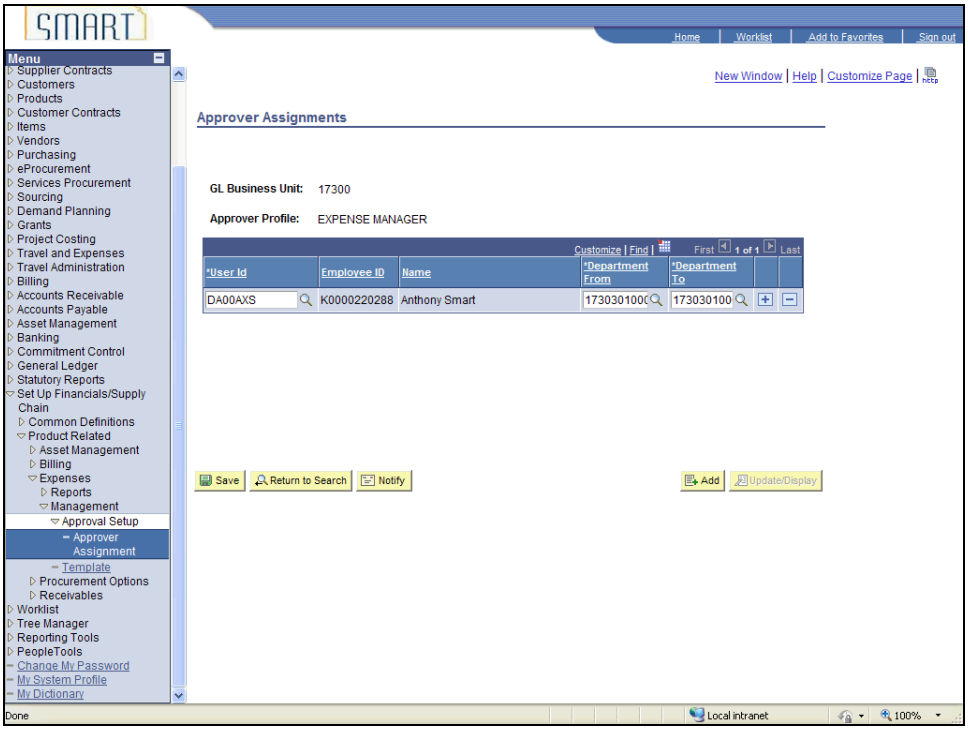
Step	Action
8.	Enter the desired information into the **GL Business Unit** field. For this simulation, enter "**17300**".
9.	Click the **Look up Approver Profile** button.
10.	Click the **EXPENSE MANAGER** link. EXPENSE MANAGER



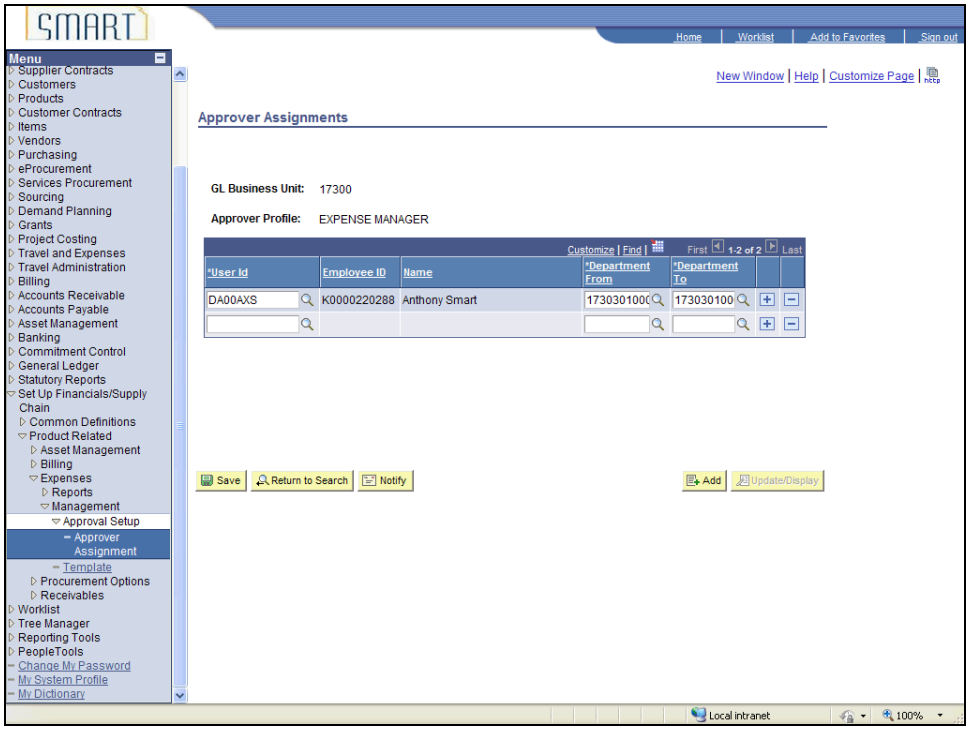
Step	Action
11.	SMART opens the Approver Assignments page for department approvers ("Expense Managers") for this agency. From this page, you can add new department approvers, delete them and update department ranges. Make sure all department ranges are covered. If an expense report is created and there is no approver listed for the department on the report, the report will error out. For this simulation, assume that the second approver on this list is no longer with the agency. You will remove this person from the list of approvers. Click the **Delete Row** button.



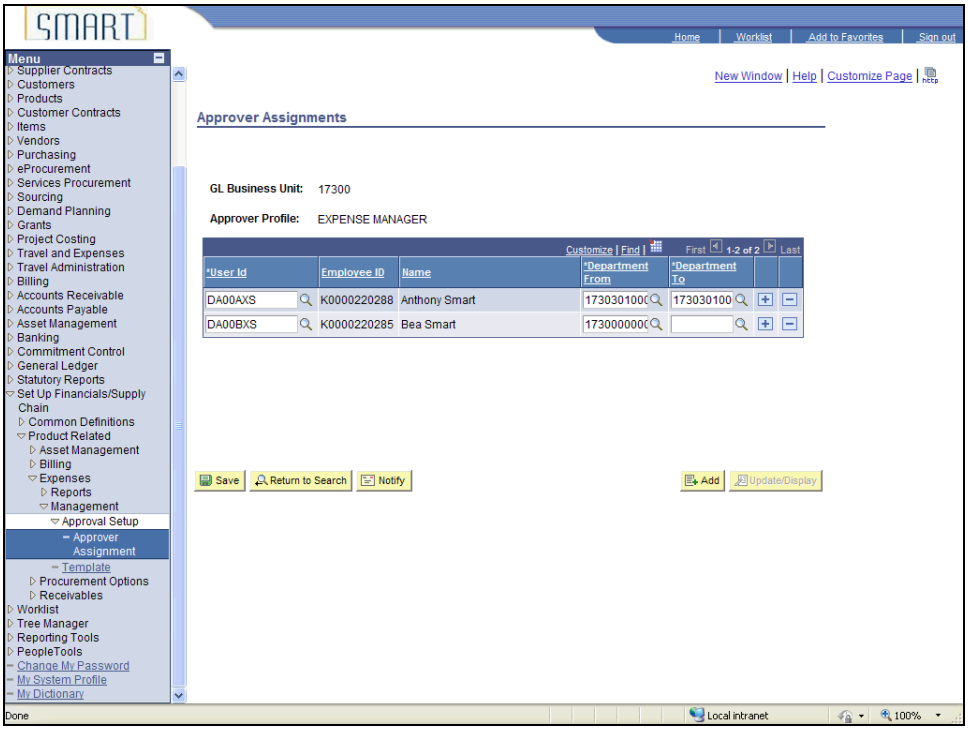
Step	Action
12.	Click the **OK** button. OK



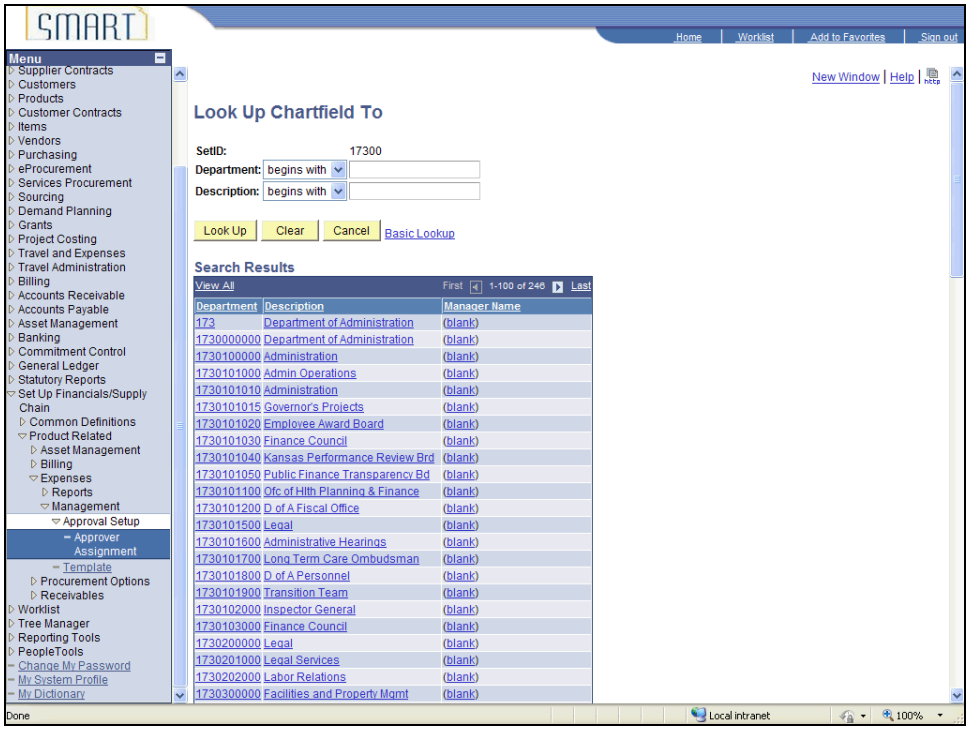
Step	Action
13.	Click the **Add a Row** button.



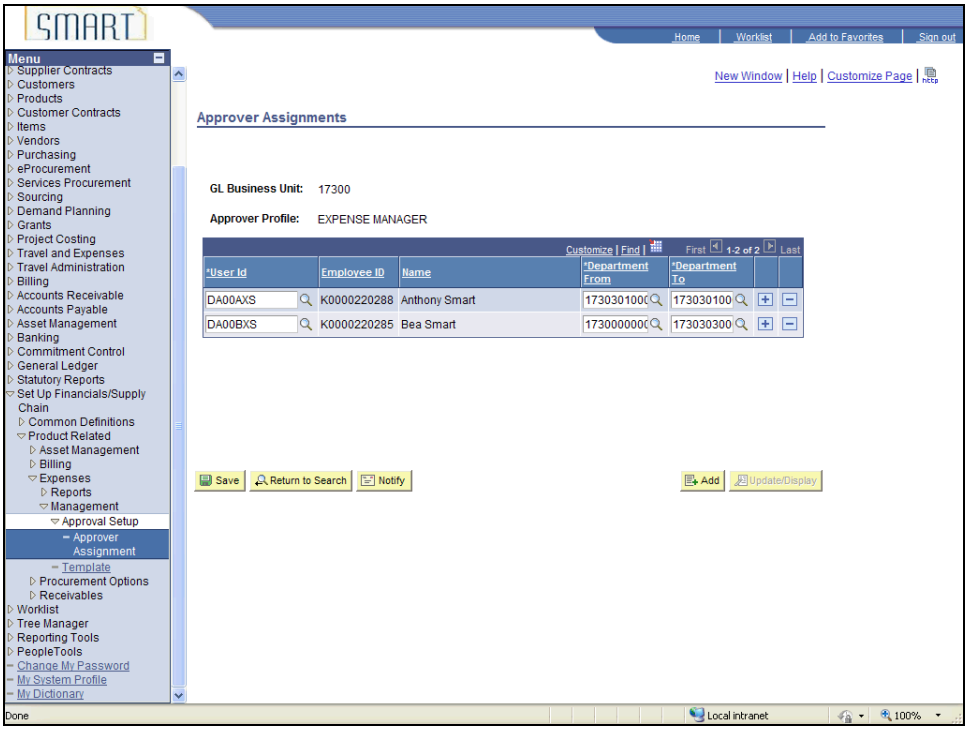
Step	Action
14.	Enter the desired information into the **User Id** field. For this simulation, enter "**DA00BXS**".
15.	Next, you will indicate the department id's within your agency for which this employee will approve. Click the **Department Look Up** button.
16.	Approvers' permissions allow them to review and approve transactions for a range of units within the department. Begin with the first 10-digit department code in the range; in this simulation, start with 1730000000. **NOTE:** The approver will also need to have the corresponding security roles. Being added as an Expense Manager alone does not give the ability to approve. Click the **1730000000** link. 1730000000



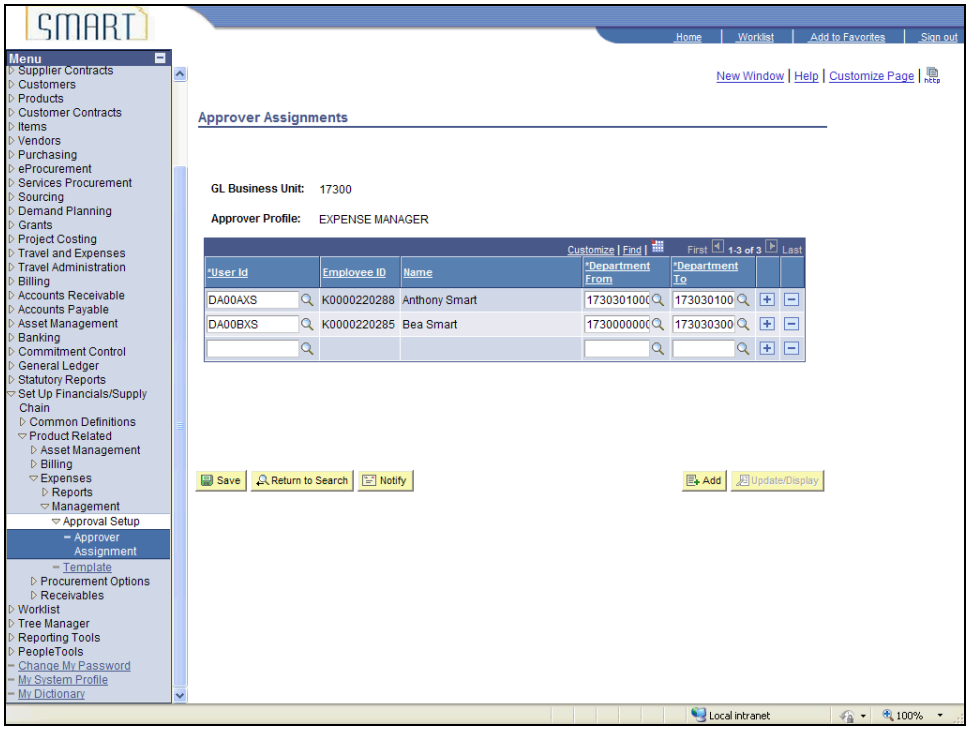
Step	Action
17.	SMART returns to the Approver Assignments page, with the code you just selected displayed in the Department From field. Now, you will enter the final unit in the range in the Department To field. Click the **Department To Look Up** button.



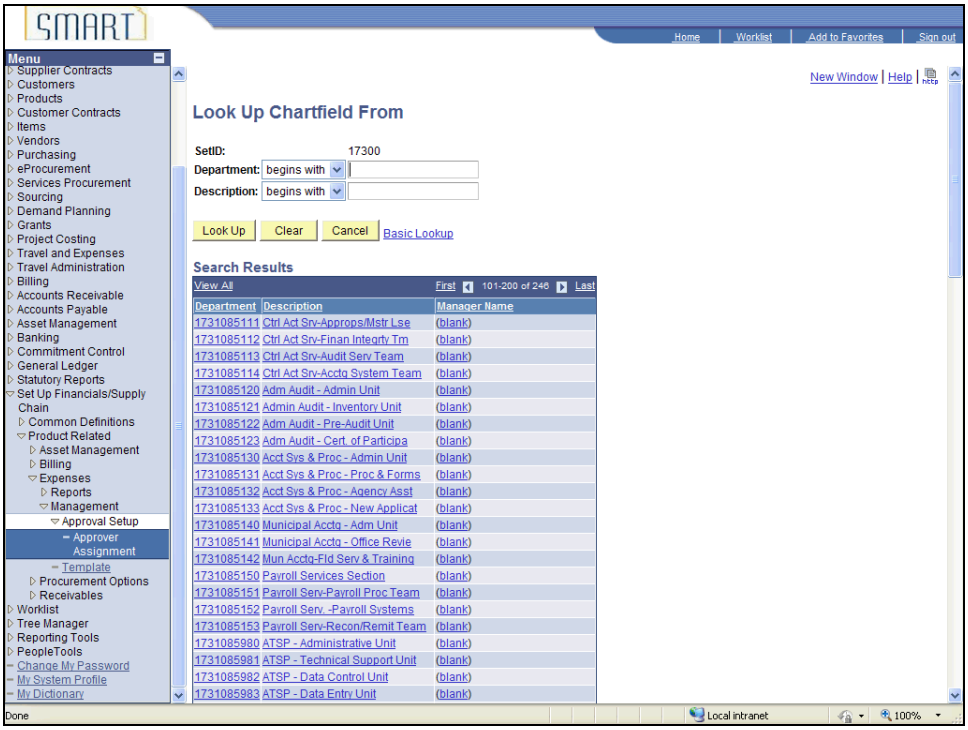
Step	Action
18.	Next, select the last unit in the range the approver will be allowed to review. In this case, it will be Facilities and Property Mgmt; by selecting this unit, you will allow the approver to review transactions for any unit in the Department of Administration from 1730000000 to 1730300000. Click the **1730300000** link. 1730300000



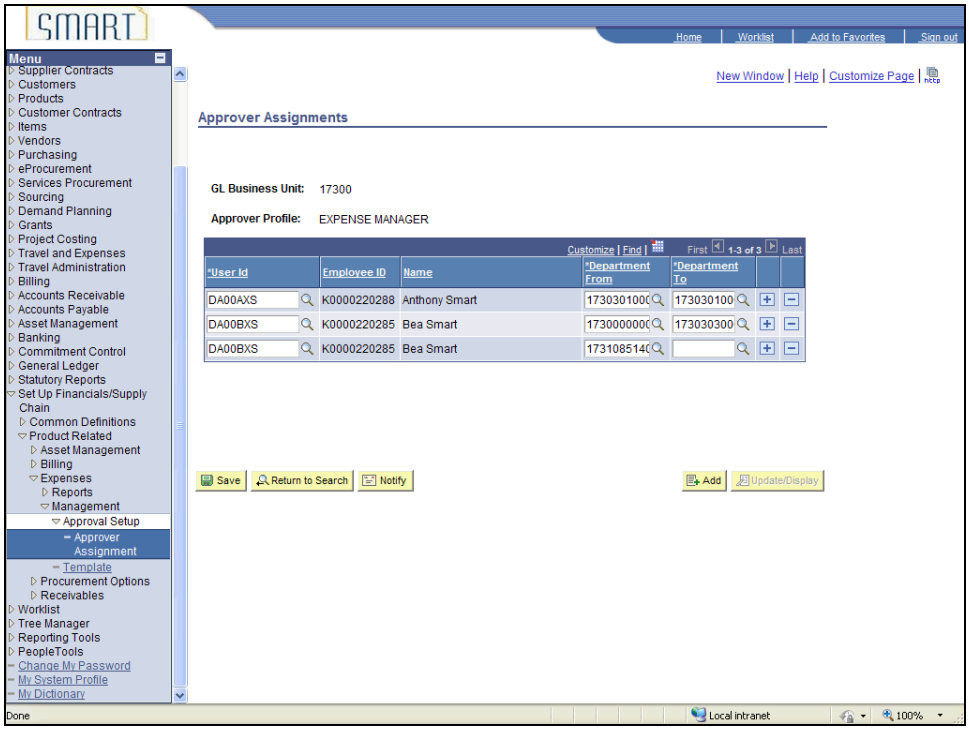
Step	Action
19.	SMART returns to Approver Assignments with the range of department id's the new approver is authorized to approve. If there is a second range for the same approver, you must repeat the process. Click the **Add a Row** button.



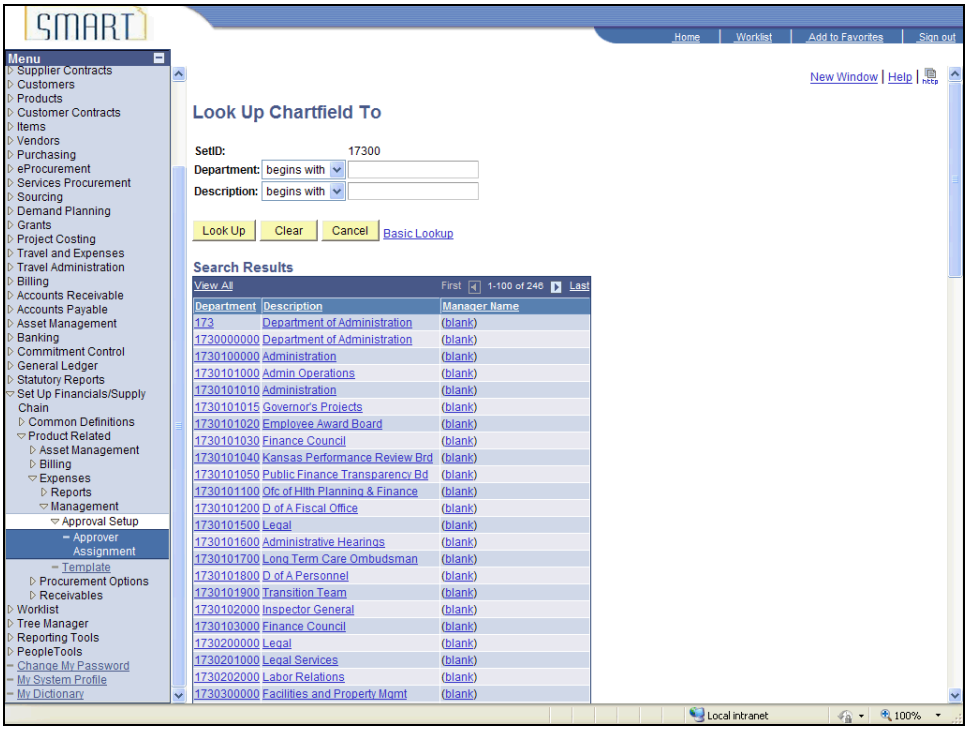
Step	Action
20.	You could enter another approver entirely, if you need. For this simulation, however, add a new range of departments for the approver you just entered. Enter the desired information into the **User Id** field. For this simulation, enter "**DA00BXS**".
21.	Click the **Department From Look Up** button.
22.	Click the **Show next rows (Alt+.)** button.



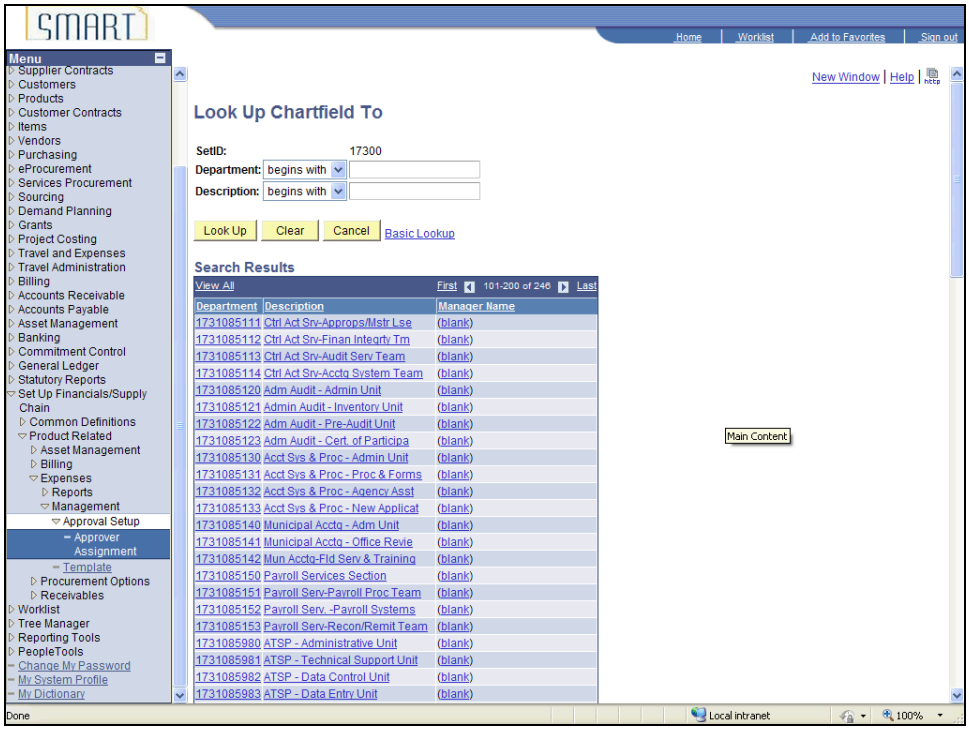
Step	Action
23.	For this simulation, assume this approver's next range of departments to approve begins with the Municipal Acctg - Adm Unit. Click the **1731085140** link. 1731085140



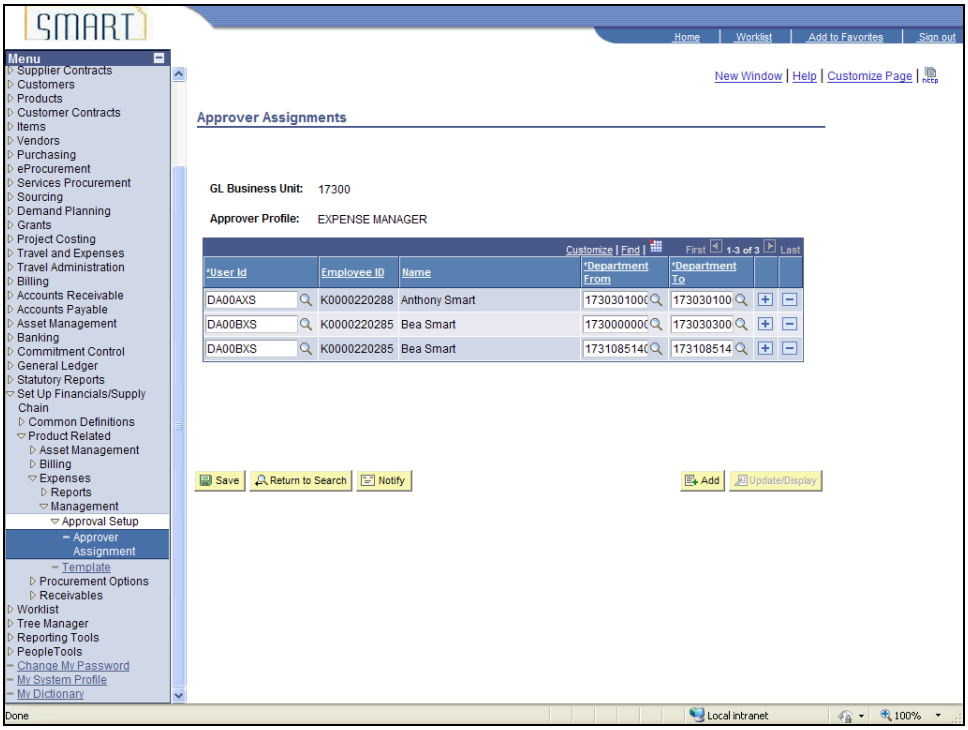
Step	Action
24.	SMART returns you again to the Approver Assignments page. Click the **Department To Look Up** button.



Step	Action
25.	Click the **Show next rows** button.



Step	Action
26.	Select the last unit for which this approver will review transactions. In this instance, assume it is for Municipal Acctg - Office Revie. Click the **1731085141** link. 1731085141



Step	Action
27.	Once you have entered all the new approvers and their department ranges, save this information. Click the **Save** button. Save
28.	**CONGRATULATIONS!** You have successfully updated department approvers. **End of Procedure.**