

STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL

Training Guide – Travel & Expenses

Updating Fiscal Approvers

State of Kansas

Travel & Expenses – Updating Fiscal Approvers Training Guide

Statewide Management, Accounting and Reporting Tool

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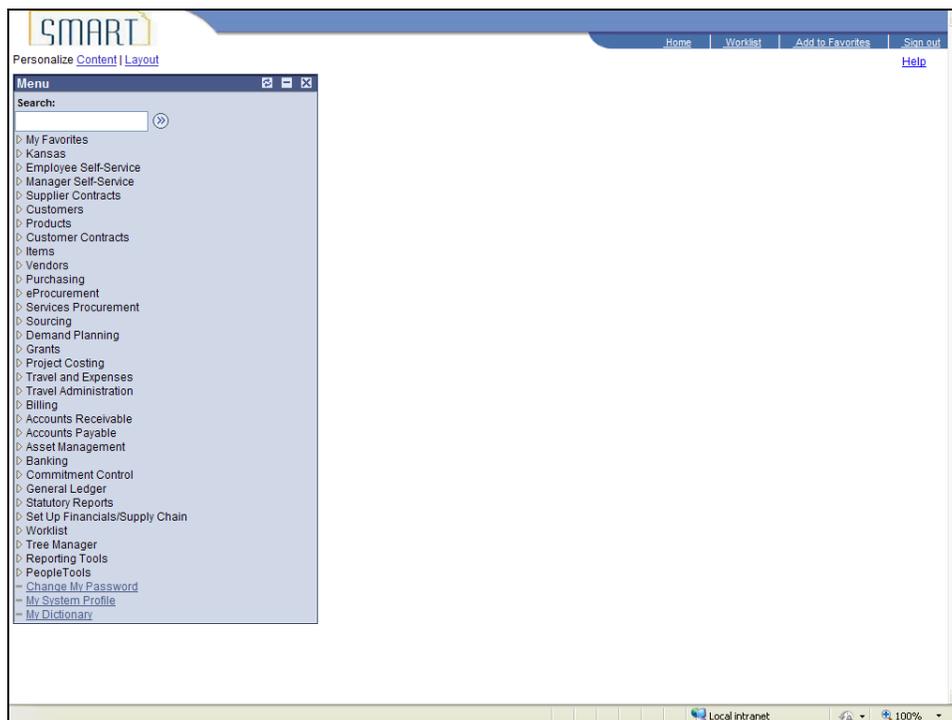
Travel & Expenses

Updating Fiscal 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 "**Prepayment Auditors.**"

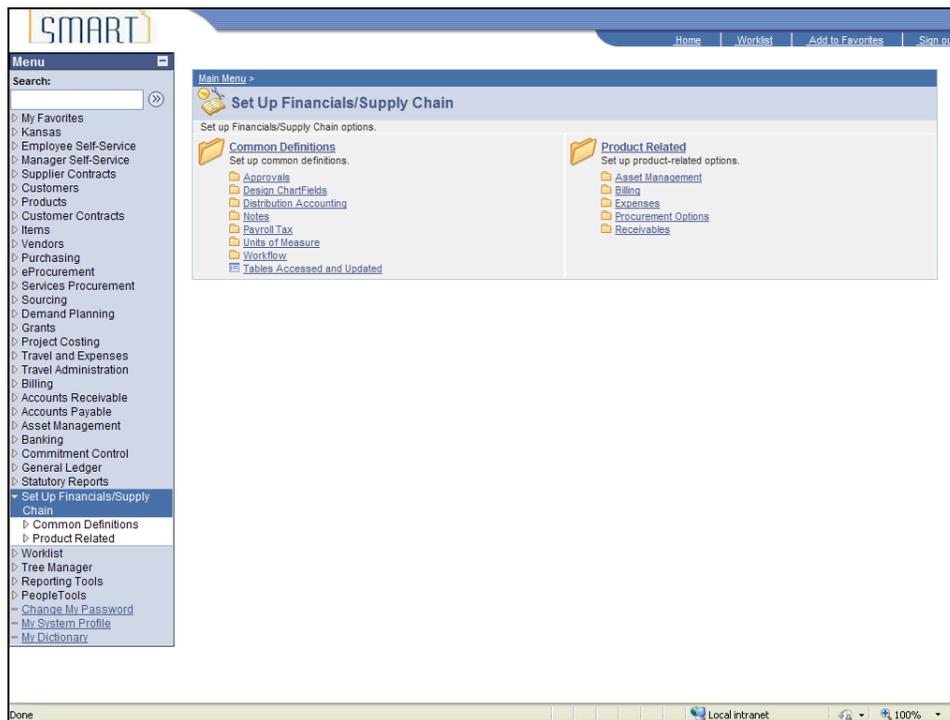
Step	Action
1.	<p>Before updating the fiscal approvers, you must know both:</p> <ul style="list-style-type: none">• The User ID for the employee(s) to become Fiscal Office approvers, and• The Department ID's for which those individuals will have approval Authority.



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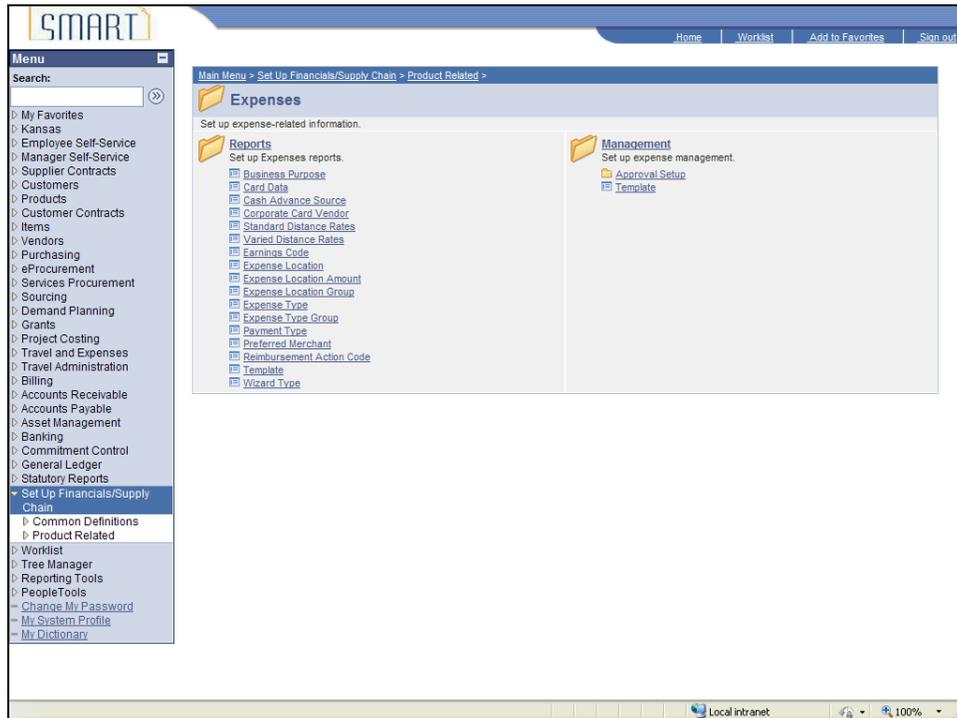
Step	Action
2.	You may need to scroll down to find the Set Up Financials/ Supply Chain link, where you will name the Fiscal Office approver. Click the right scrollbar.
3.	Click the Set Up Financials/Supply Chain link. Set Up Financials/Supply Chain



Step	Action
4.	SMART opens the Set Up Financials/Supply Chain menu. Click the Product Related link. Product Related
5.	SMART opens the Product Related menu. Click the Expenses link. Expenses

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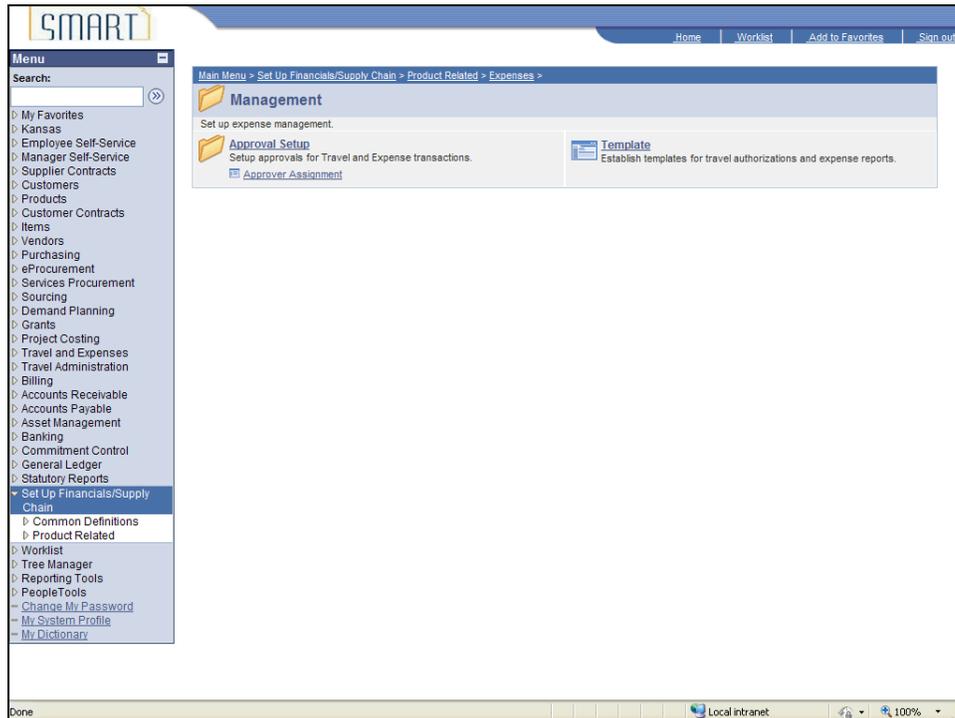
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Step	Action
6.	SMART opens the Expenses menu. Click the Management link. Management

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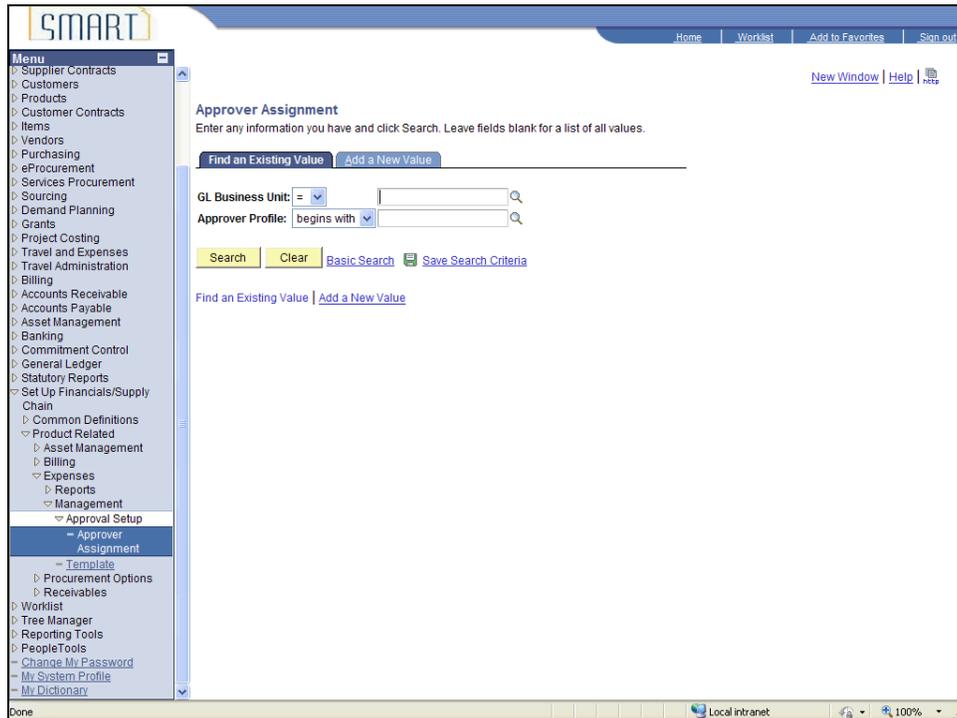
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Step	Action
7.	<p>SMART opens the Management menu.</p> <p>Click the Approval Setup link.</p> <p>Approval Setup</p>
8.	<p>SMART opens the Approval Setup menu.</p> <p>Click the Approver Assignment link.</p> <p>Approver Assignment</p>

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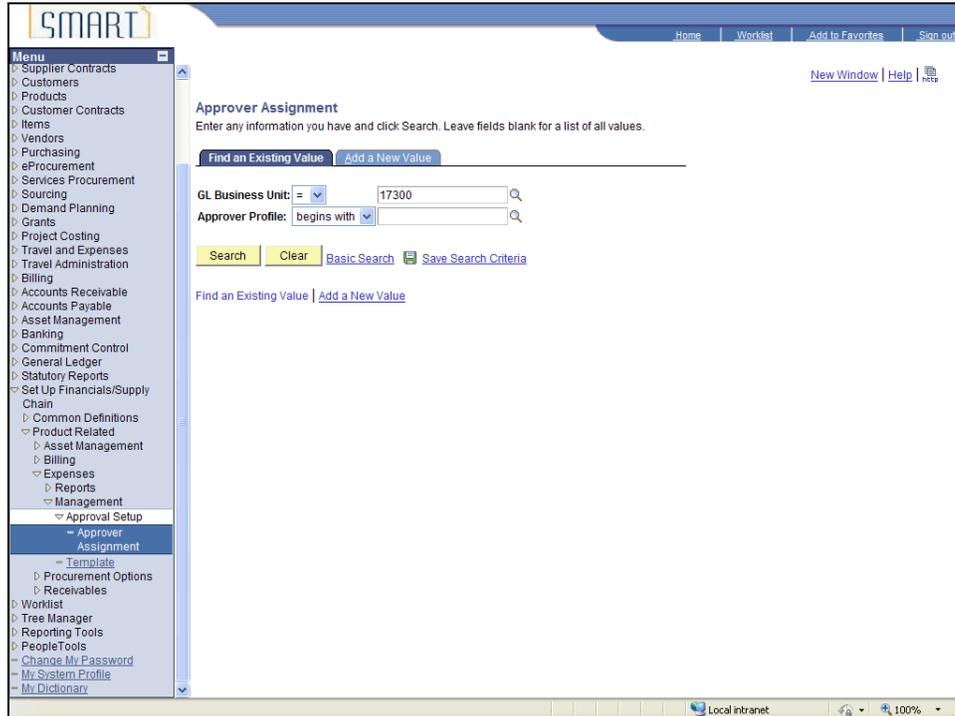
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Step	Action
9.	SMART opens the Approver Assignment page. Click in the GL Business Unit field. <input data-bbox="337 1199 618 1241" type="text"/>

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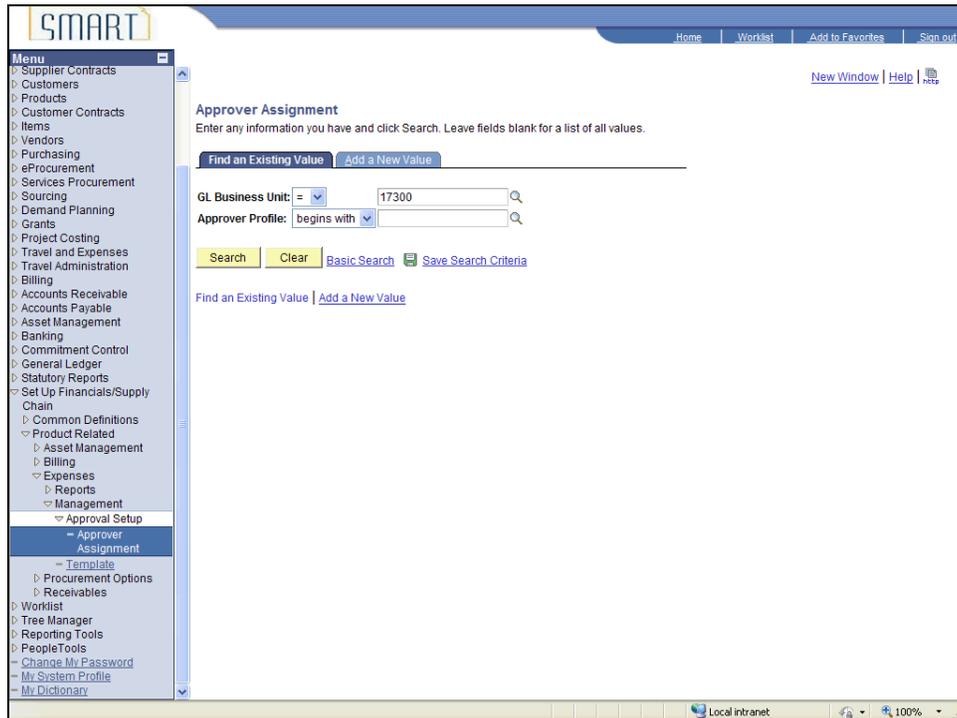
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Step	Action
10.	<p>You will use the GL Business Unit field to enter the 5-digit number of the agency you are adding a new approver for.</p> <p>Enter the desired information into the GL Business Unit field. For this simulation, enter "17300".</p>

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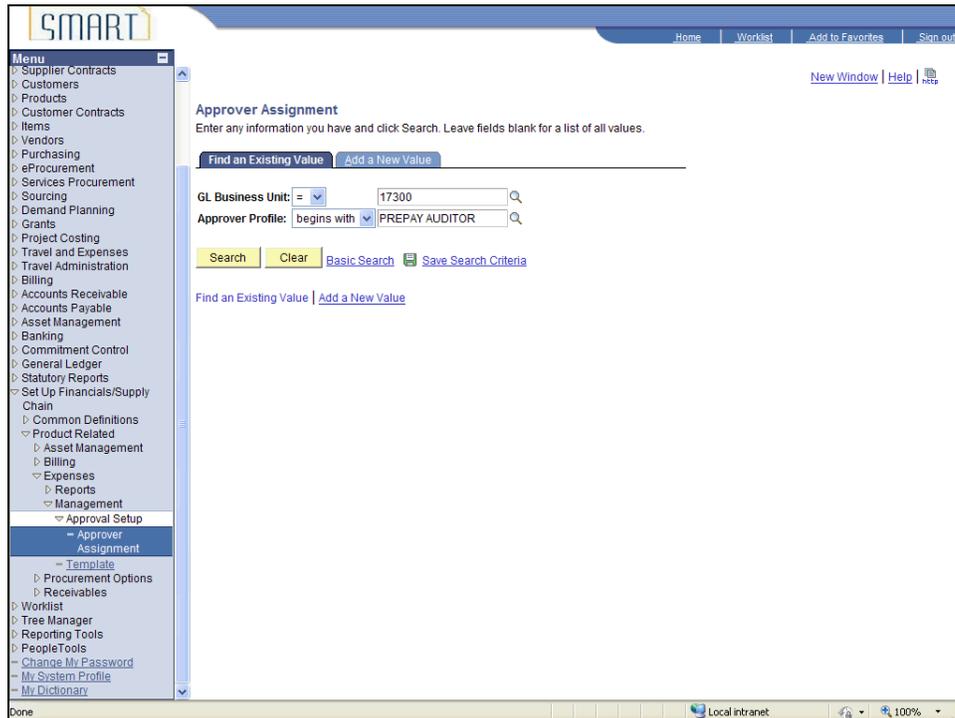
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Step	Action
11.	<p>Next, you will identify the approval rights you are about to grant for this agency.</p> <p>Click the Look up Approver Profile button.</p> 
12.	<p>SMART uses the term "Prepay Auditor" for the agency's Fiscal Office Approvers.</p> <p>Click the PREPAY AUDITOR link.</p> <p>PREPAY AUDITOR</p>

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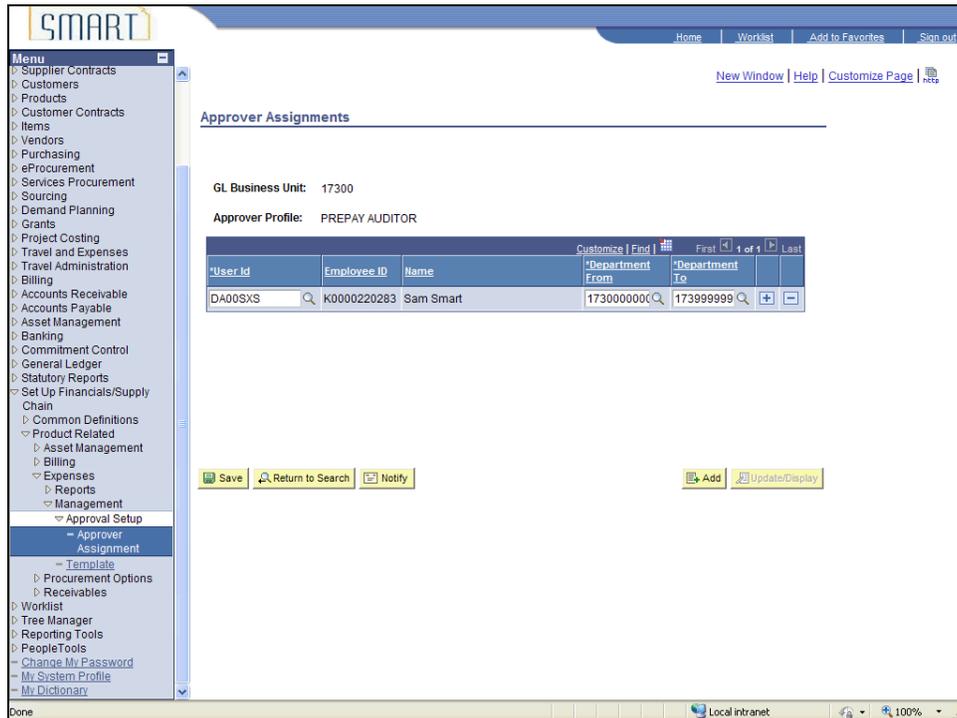
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Step	Action
13.	<p>SMART populates the Approver Profile field with the title "Prepay Auditor." Now you will go to the page that lists all of the people who perform this role for this agency.</p> <p>Click the Search button.</p> <div data-bbox="305 1234 443 1283" style="border: 1px solid black; padding: 2px; display: inline-block;"> <p style="margin: 0;">Search</p> </div>

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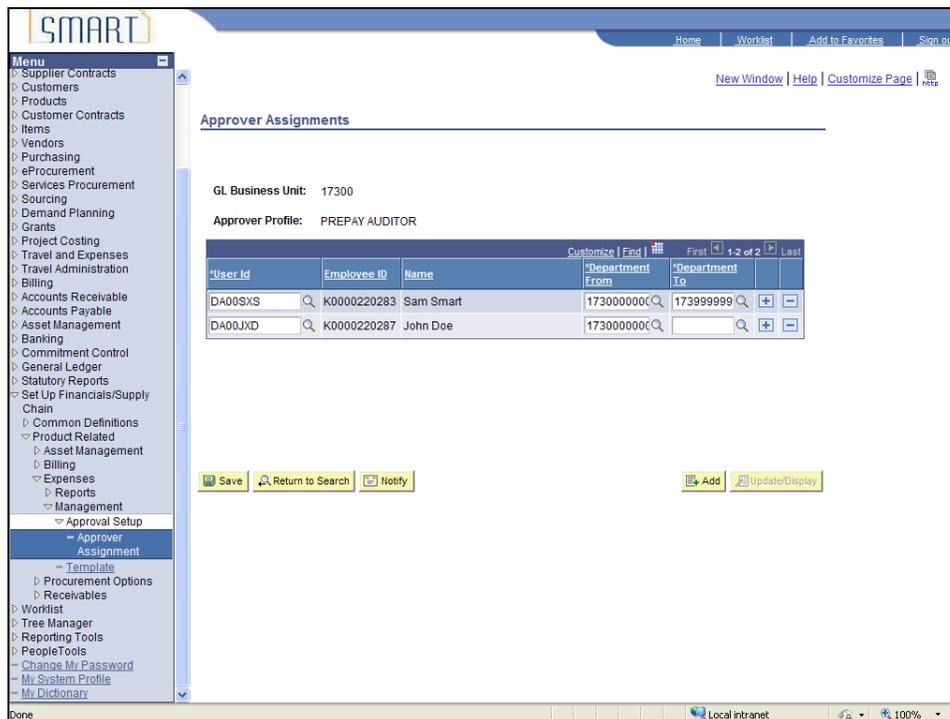


Step	Action
14.	<p>SMART opens the Approver Assignments page.</p> <p>On the far right of the rows, there are a "+" button and a "-" button. The "+" button is used to add a row (add an Approver). The "-" button is used to delete a row (remove an Approver).</p> <p>For this simulation, we will add an approver.</p> <p>Click the Add a new row at row 1 button.</p> 
15.	<p>SMART creates a new line to allow you to assign another user to the Prepay Auditor profile. If needed, you can use the look-up icon (magnifying glass) to the right of the field.</p> <p>For this simulation, you already know the correct User ID for the new Fiscal Approver, it is "DA00JXD".</p> <p>Click in the User Id field.</p> <input data-bbox="337 1688 537 1730" type="text"/>
16.	<p>Enter the desired information into the User Id field. For this simulation, enter "DA00JXD".</p>

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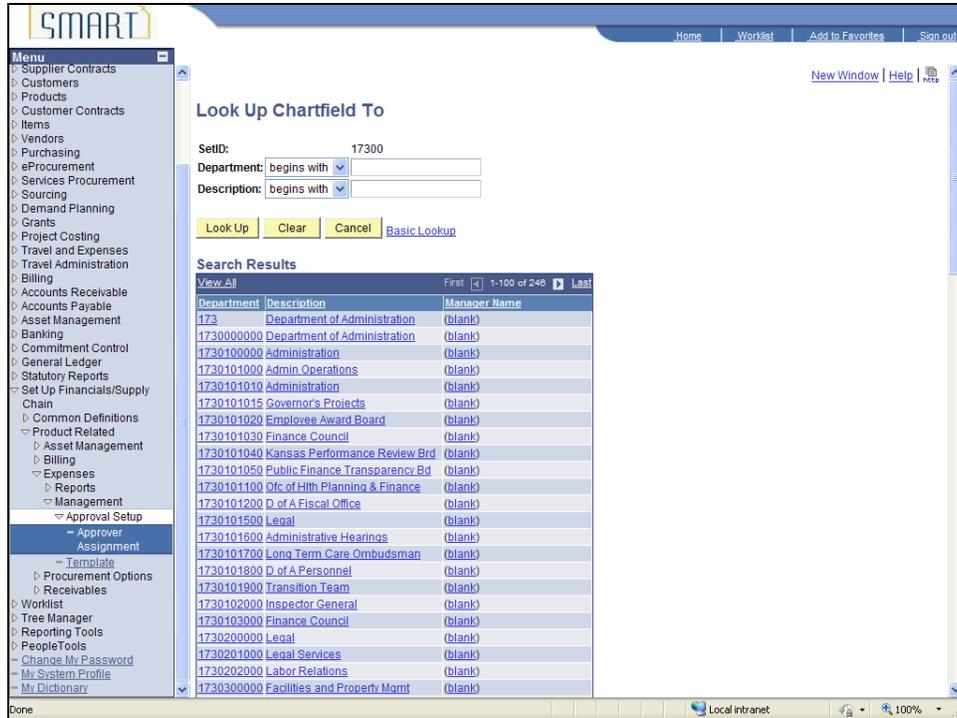
Step	Action
17.	<p>Next, enter the range of Department ID's this person is allowed to approve transactions for.</p> <p>Click the *Department From button.</p> 
18.	<p>Most often, the employee will be allowed to approve transactions throughout the entire agency. Begin by selecting the lowest 10-digit Department Number for this agency.</p> <p>For this simulation, select the 1730000000 link.</p> <p>Click the 1730000000 link.</p> 



Step	Action
19.	<p>SMART returns you to the Approver Assignments page. Notice that the Department From field begins with the number you just selected.</p> <p>You will close the range by using the "Department To" field.</p> <p>Click the *Department To button.</p> 

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Step	Action
20.	<p>You want to allow the new approver to approve through Department 1732596010: DFM Admin - Director's Office. You will need to select this department number in the range. Because there are more than 100 of these, you will need to go to the next page.</p> <p>Click the Show next rows button.</p> 

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SMART

Home | Worklist | Add to Favorites | Sign out

New Window | Help |

Look Up Chartfield To

SetID: 17300

Department: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View All First 101-200 of 246 Last

Department	Description	Manager Name
1731085111	Ctrl Act Srv-Approps/Mstr Lse	(blank)
1731085112	Ctrl Act Srv-Finan Inteqrv Tm	(blank)
1731085113	Ctrl Act Srv-Audit Serv Team	(blank)
1731085114	Ctrl Act Srv-Accto System Team	(blank)
1731085120	Adm Audit - Admin Unit	(blank)
1731085121	Admin Audit - Inventory Unit	(blank)
1731085122	Adm Audit - Pre-Audit Unit	(blank)
1731085123	Adm Audit - Cert. of Participa	(blank)
1731085130	Acct Sys & Proc - Admin Unit	(blank)
1731085131	Acct Sys & Proc - Proc & Forms	(blank)
1731085132	Acct Sys & Proc - Agency Asst	(blank)
1731085133	Acct Sys & Proc - New Applicat	(blank)
1731085140	Municipal Accto - Adm Unit	(blank)
1731085141	Municipal Accto - Office Revie	(blank)
1731085142	Mun Accto-Elid Serv & Training	(blank)
1731085150	Payroll Services Section	(blank)
1731085151	Payroll Serv-Payroll Proc Team	(blank)
1731085152	Payroll Serv - Payroll Systems	(blank)
1731085153	Payroll Serv-Recon/Remit Team	(blank)
1731085980	ATSP - Administrative Unit	(blank)
1731085981	ATSP - Technical Support Unit	(blank)
1731085982	ATSP - Data Control Unit	(blank)
1731085983	ATSP - Data Entry Unit	(blank)

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Step	Action
21.	You may need to scroll down the page to see the last of the Department numbers. Click the scrollbar.

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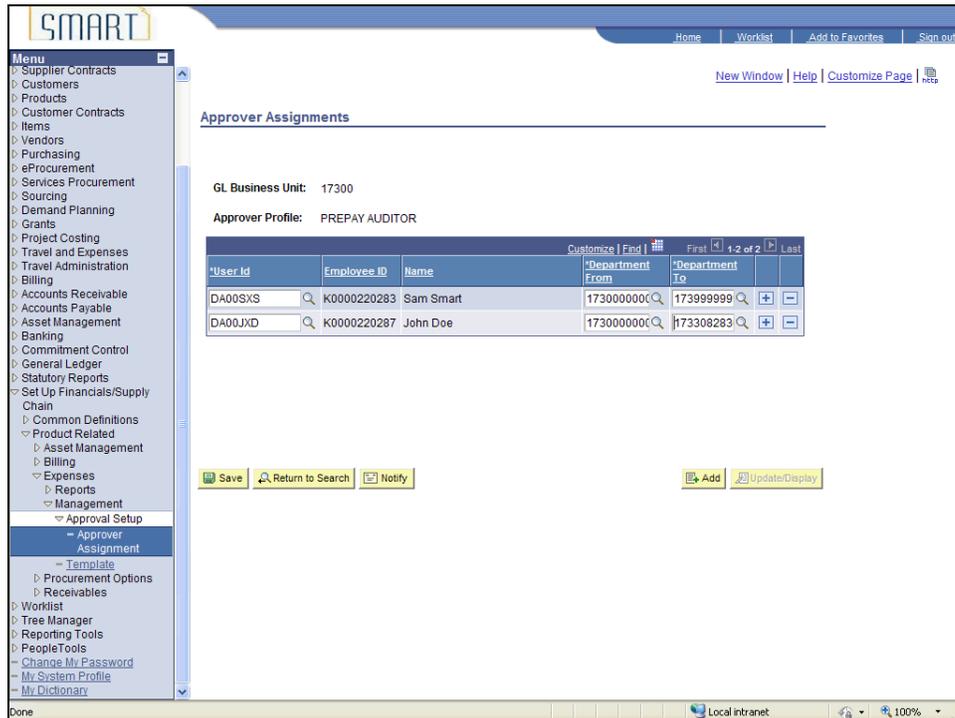
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Step	Action
22.	<p>Select the Department number for DFM Admin-Director's Office.</p> <p>Click the 1732596010 link.</p> <p>1732596010</p>

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Step	Action
23.	<p>Before you leave the record, make sure you click the Save button to save the changes you have just made.</p> <p>Click the Save button.</p> 
24.	<p>CONGRATULATIONS!</p> <p>You successfully added a new Fiscal Approver to this agency. End of Procedure.</p>