Training Guide – Travel & Expenses
Default ChartField Values

State of Kansas
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel &amp; Expenses</td>
<td>1</td>
</tr>
<tr>
<td>Default ChartField Values</td>
<td>1</td>
</tr>
</tbody>
</table>
Travel & Expenses

Default ChartField Values

Procedure

An agency Travel and Expenses Maintainer sometimes will need to update certain elements of an employee’s profile. One such element is the ChartField funding string values that describe which program funds pay for the employee's travel and expenses.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The TE Maintainer will update an employee's default ChartField values if the employee's fund, budget unit, or program changes. <strong>IMPORTANT:</strong> For an employee to receive Cash Advances, default ChartField values must exist in that employee's profile.</td>
</tr>
</tbody>
</table>
| 2.   | Before beginning the process, the **TE Maintainer** must know:  
  • The State of Kansas Employee ID Number of the employee whose ChartField values you are adjusting, and  
  • The correct ChartField values you want to change the default to, including: Fund, Budget Unit, Program, and Department. |
Step 3. From SMART’s home page, click the Travel and Expenses link.
Step 4. SMART opens the **Travel and Expenses** Main Menu page.

Click the **Manage Employee Information** link.

Step 5. SMART opens the **Manage Employee** Information menu.

Click the **Update Profile** link.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>SMART opens the <strong>Employee Profile (Edit)</strong> page. Make sure the <strong>Search by:</strong> drop-down menu is set to &quot;<strong>EmplID</strong>&quot;. In this simulation, the <strong>Search by:</strong> option is correct. <strong>Click in the begins with field.</strong></td>
</tr>
<tr>
<td>7.</td>
<td>Enter the State of Kansas Employee ID Number for the employee default profile you will adjust. Enter the desired information into the <strong>begins with</strong> field. For this simulation, enter &quot;<strong>K0000220288</strong>&quot;.</td>
</tr>
<tr>
<td>8.</td>
<td>Click the <strong>Search</strong> button.</td>
</tr>
</tbody>
</table>
9. SMART opens the Employee Information page, Employee Data tab (first tab at top left of page).

Click the Organizational Data tab.

10. SMART opens the Organizational Data Tab. This displays the employee's expense processing profile. If this is the employee's default profile, the "Default Profile" box will be checked.

**NOTE:** An employee may have more than one profile. Make sure the GL Unit is the correct agency profile you are wanting to pay the employee from and the "Default Profile" box is checked. If the "Default Profile" box is not checked for the correct GL Unit, payment will be made from the incorrect funding.

11. On this page, also confirm that the Employee Status shows "Active" and that the values in GL Unit and Department fields are correct.
Step 12. Review the ChartField Values in the "Default ChartField Values" section. Make changes to any that do not reflect the correct Fund, Budget Unit, Program, or Department. Remember: These values must be populated if the employee is to receive cash advances for travel.

In this simulation, the GL Unit is correct, but there is no information provided for Fund, Budget Unit, or Program. You will enter values for those ChartField strings.

Click the Look Up Fund button.
Step | Action |
--- | --- |
13. | SMART opens the **Look Up Fund** page. This page will show the various Funds available for this GL Unit (17300, in this case). Find the fund that should be assigned to this employee on this list. (You may need to use the scroll bar or the arrows at the top of the Search Results to see more funds.) For this simulation, assume the employee's default ChartField Fund Value should be the State General Fund (Fund 1000). The link in the **Fund Code** column will populate that field on the employee's profile, once you select it. Click the **1000** link. |
14. | Click the **Look Up Bud Unit** button. |
15. | Click the **0500** link. |
16. | Click the **Look Up Program** button. |
### Step 17
Click the 01031 link.

### Step 18
The **Department** field is on the far right-hand side of the Default ChartField Values section. It may be off-screen, in which case you will need to scroll to the right to see it.

### Step 19
The **Department** field functions in the same fashion as the **Fund**, **Budget Unit**, and **Program** fields. The **Department** field populates or changes the department value listed in the HR information section.

Click the **Look Up Dept** button.

### Step 20
Select the **Department** code from the menu.

Click the 1733010000 link.

### Step 21
Next, save the default ChartField default values you entered.

Click the **Save** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Before leaving this employee’s profile, double-check to be certain the &quot;Default Profile&quot; box is checked. If a &quot;Default Profile&quot; box is not selected, payment will not be processed for the employee.</td>
</tr>
</tbody>
</table>
| 23.  | Congratulations!  
You have successfully updated the Default ChartField Values. **End of Procedure.** |