



STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL

Training Guide – Travel & Expenses Setting Up Proxies

State of Kansas

Travel & Expenses – Setting Up Proxies Training Guide

Statewide Management, Accounting and Reporting Tool

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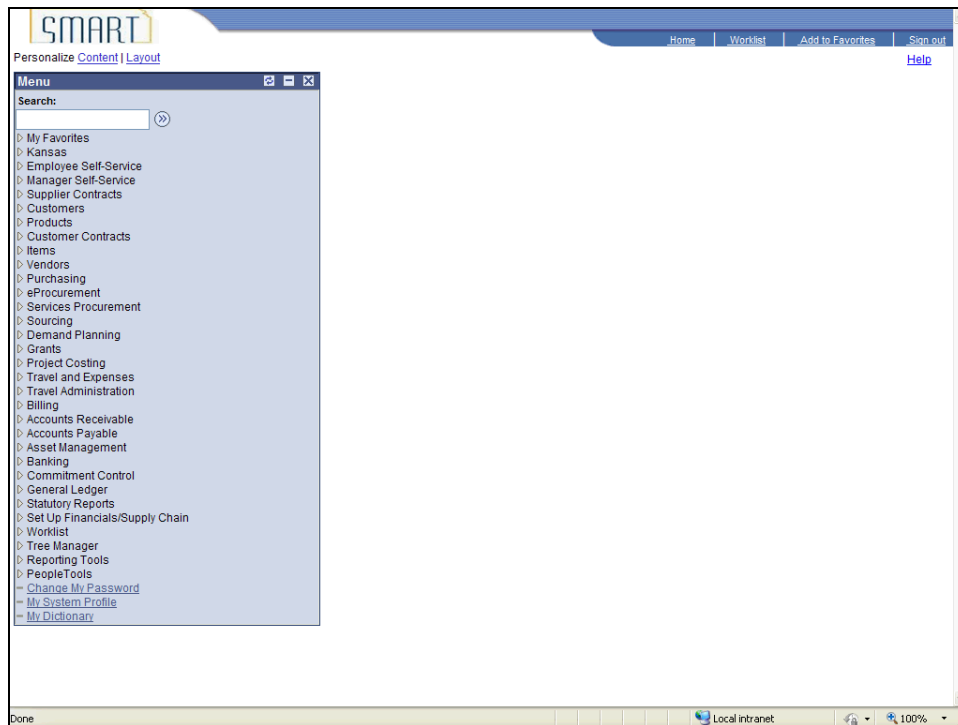
Travel & Expenses

Setting Up Proxies

Procedure

A "proxy" is a SMART user who is able to enter expense transactions on behalf of an employee. You may need to set up a proxy for an employee when he or she is a new traveler, when that employee's previous proxy leaves the agency, or any time an employee needs to have access allowing him or her to perform actions such as deleting expense reports or cancelling travel authorizations for an employee.

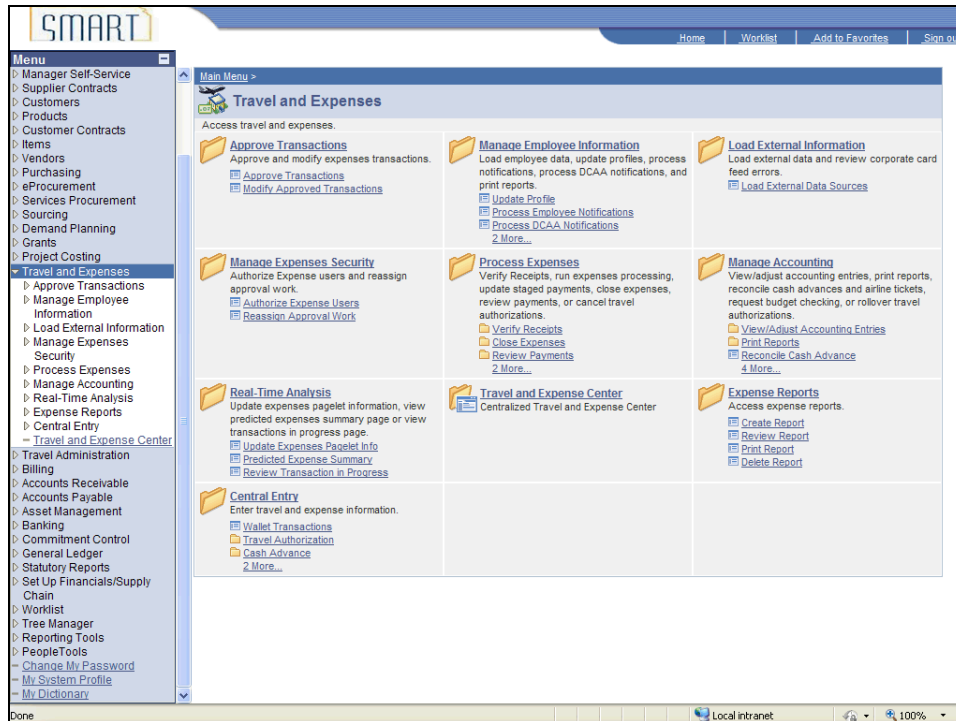
Step	Action
1.	<p>Before you begin this process, you must know:</p> <ul style="list-style-type: none">• The Employee ID number of the person to whom you will add one or more proxies, and• The User ID's of the proxy or proxies you will add.



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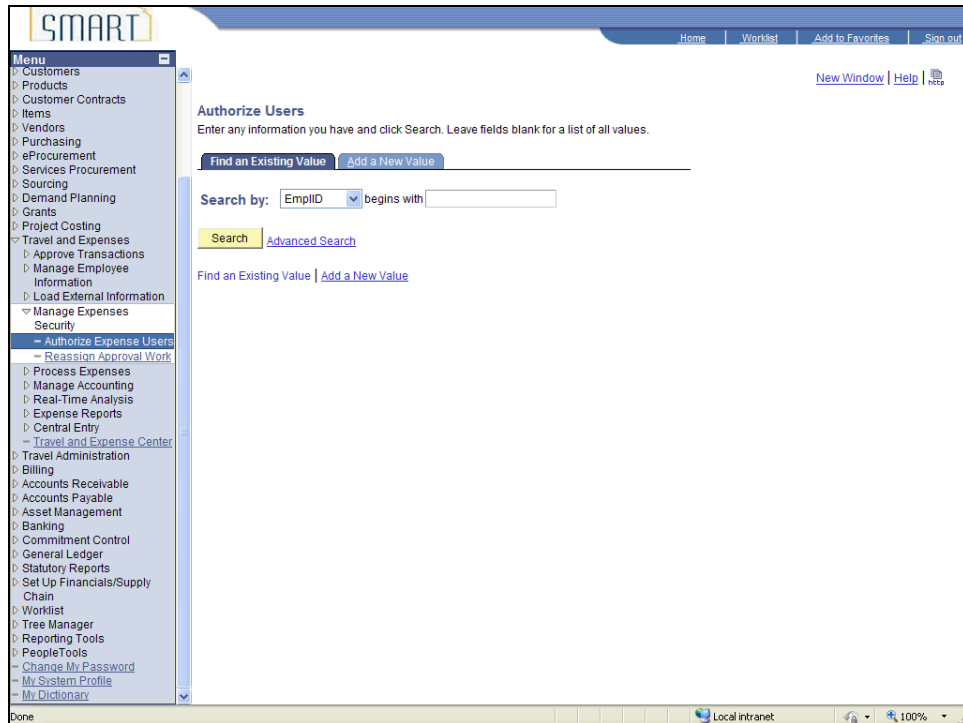
Step	Action
2.	<p>Begin from the SMART home page.</p> <p>Click the Travel and Expenses link.</p> <p>Travel and Expenses</p>



Step	Action
3.	<p>SMART opens the Travel and Expenses menu.</p> <p>Click the Manage Expenses Security link.</p> <p>Manage Expenses Security</p>
4.	<p>SMART opens the Manage Expenses Security menu.</p> <p>Click the Authorize Expense Users link.</p> <p>Authorize Expense Users</p>

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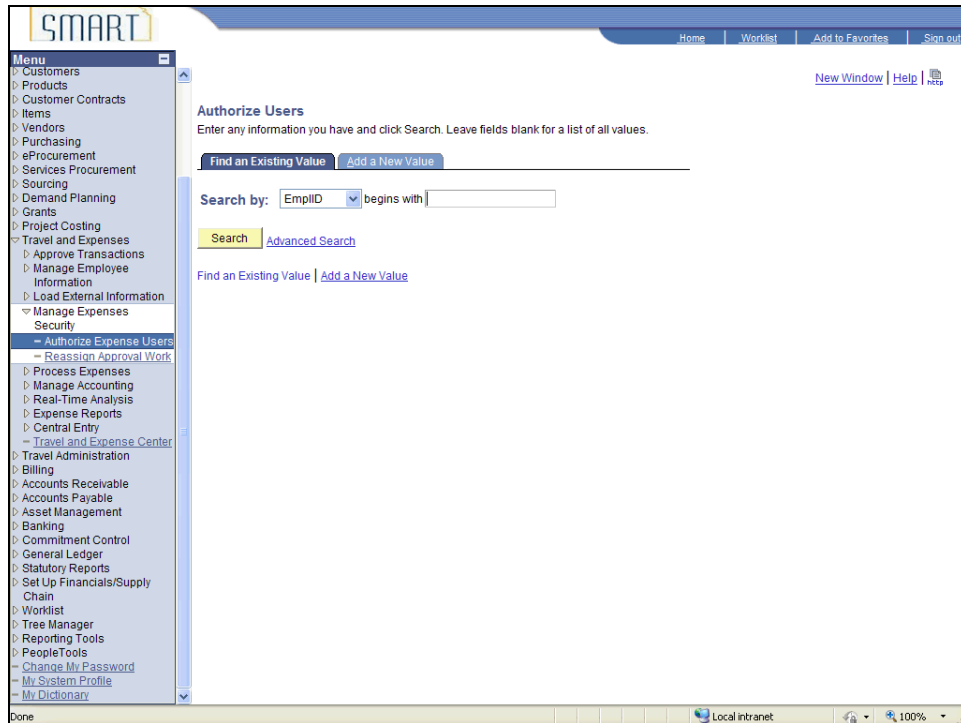
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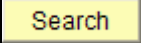


Step	Action
5.	<p>SMART opens the Authorize Users page. (Be certain the "Find an Existing Value" tab is highlighted.)</p> <p>Click in the begins with field.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div>

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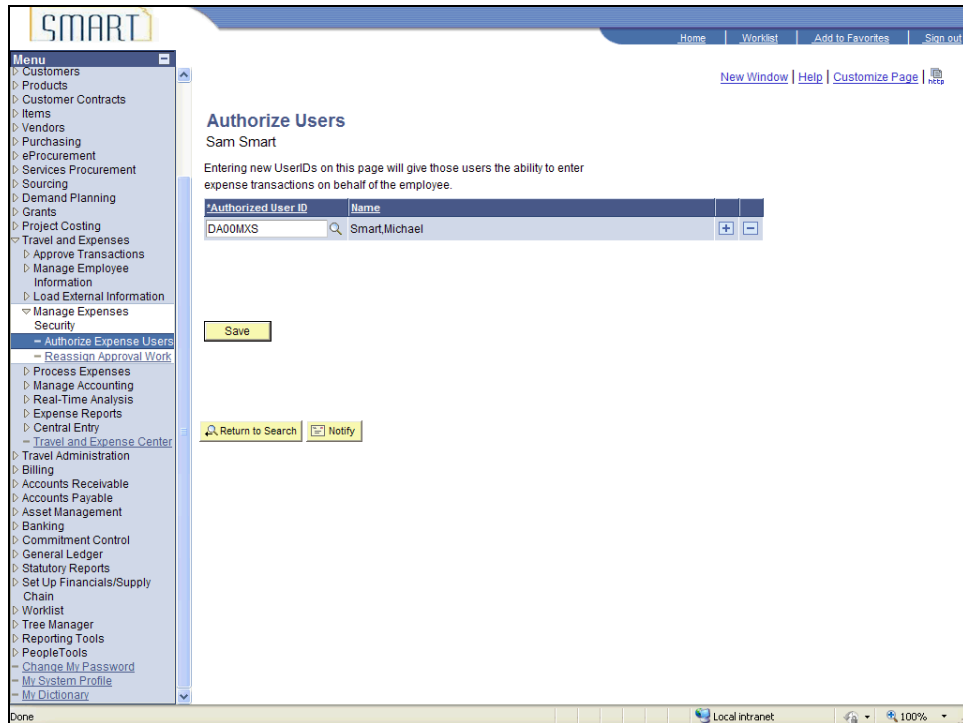
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Step	Action
6.	<p>Key in the Employee ID number of the person to whose profile you are adding one or more proxies.</p> <p>Enter the desired information into the begins with field. For this simulation, enter "K0000220283".</p>
7.	<p>Click the Search button.</p> 

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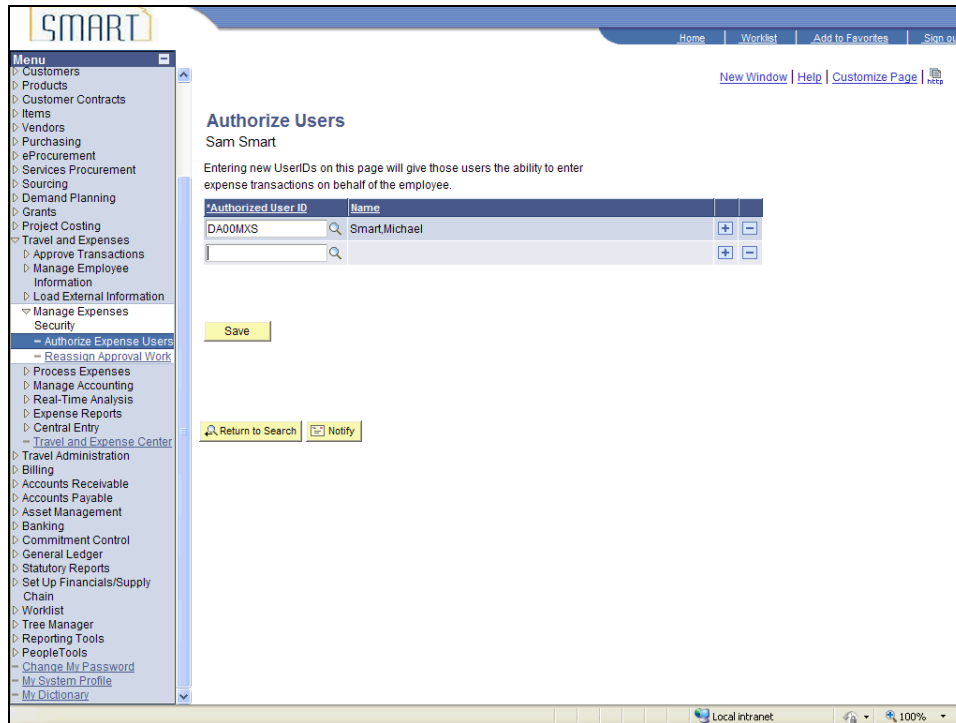
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Step	Action
8.	<p>SMART opens the Authorize Users page. Double-check that the page names the right employee--in this case, Sam Smart. Michael Smart is currently set up as a proxy. Add Bea Smart as a proxy also.</p> <p>Begin by adding a row to enter the proxy.</p> <p>Click the Add a new row button.</p> 

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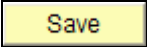
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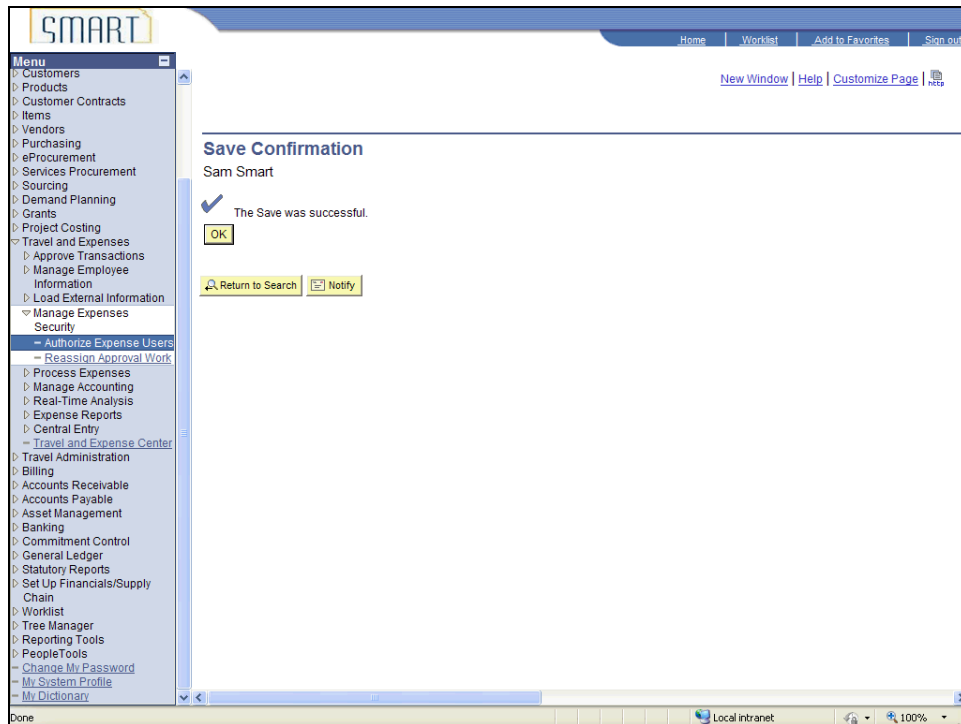



Step	Action
9.	<p>SMART adds a new row. This is where you will enter the User ID of the proxy.</p> <p>Click in the Authorized User ID field.</p> <input type="text"/>
10.	<p>Enter the desired information into the Authorized User ID field. For this simulation, enter "DA00BXS".</p>
11.	<p>SMART will allow the user to enter an Employee ID on the Authorize Users page, but entering an Employee ID will not grant proxy access. Make sure to add User ID's.</p> <p>Some employee's have multiple User ID's - make sure to select the User ID that has the appropriate security roles attached to it.</p> <p>For example, if Michael Smart had multiple User ID's (DA00MXS and DA01MXS), the DA01MXS profile may be for entering Petty Cash and Imprest vouchers. Entering DA01MXS on the Authorize Users page would cause workflow to error out since the DA01MXS User ID does not have the T & E Approver security role attached.</p> <p>IMPORTANT: The User ID entered on the Authorize Users page must be the User ID the Approver logs into the SMART system with to approve T & E transactions.</p>

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Step	Action
12.	<p>Once you enter this information, save it.</p> <p>Click the Save button.</p> 



Step	Action
13.	<p>SMART lets you know that it saved the information you entered.</p> <p>Click the OK button.</p> 
14.	<p>SMART returns you to the Authorize Users page and displays the new proxy you just entered. If needed, you can repeat the steps of clicking on the "+" button and entering new User ID's for all the proxies you need to enter for the employee.</p> <p>End of Procedure.</p>