Training Guide – Travel & Expenses
Updating Fiscal Approvers

State of Kansas
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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.”

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<th>Step</th>
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<tr>
<td>1.</td>
<td>Before updating the fiscal approvers, you must know both:</td>
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<tr>
<td></td>
<td>• The User ID for the employee(s) to become Fiscal Office approvers, and</td>
</tr>
<tr>
<td></td>
<td>• The Department ID’s for which those individuals will have approval Authority.</td>
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Step | Action
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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.

![SMART Menu](image)

Step | Action
--- | ---
4. | SMART opens the **Set Up Financials/Supply Chain** menu. Click the **Product Related** link.
5. | SMART opens the **Product Related** menu. Click the **Expenses** link.
### Step 6

**Action**

SMART opens the **Expenses** menu.

Click the **Management** link.

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<td>6.</td>
<td>SMART opens the <strong>Expenses</strong> menu. Click the <strong>Management</strong> link.</td>
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<td>Step</td>
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<td>------</td>
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<tr>
<td>7.</td>
<td>SMART opens the <strong>Management</strong> menu. Click the <strong>Approval Setup</strong> link.</td>
</tr>
<tr>
<td>8.</td>
<td>SMART opens the <strong>Approval Setup</strong> menu. Click the <strong>Approver Assignment</strong> link.</td>
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</table>
### Step 9

**Action**

SMART opens the **Approver Assignment** page.

Click in the **GL Business Unit** field.

![Appraiser Assignment Page](image-url)
Step 10. You will use the **GL Business Unit** field to enter the 5-digit number of the agency you are adding a new approver for.

Enter the desired information into the **GL Business Unit** field. For this simulation, enter "17300".
### Step 11
Next, you will identify the approval rights you are about to grant for this agency.

Click the **Look up Approver Profile** button.

### Step 12
SMART uses the term "**Prepay Auditor**" for the agency's Fiscal Office Approvers.

Click the **PREPAY AUDITOR** link.
Step 13. 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.

Click the **Search** button.
Step | Action
--- | ---
14. | SMART opens the **Approver Assignments** page.

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).

For this simulation, we will add an approver.

Click the **Add a new row at row 1** button.

15. | 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.

For this simulation, you already know the correct User ID for the new **Fiscal Approver**, it is "**DA00JXD**".

Click in the **User Id** field.

16. | Enter the desired information into the **User Id** field. For this simulation, enter "**DA00JXD**".
### Step 17
Next, enter the range of Department ID's this person is allowed to approve transactions for.

**Action:**
- Click the *Department From* button.

### Step 18
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.

For this simulation, select the 1730000000 link.

**Action:**
- Click the **1730000000** link.

### Step 19
SMART returns you to the *Approver Assignments* page. Notice that the *Department From* field begins with the number you just selected.

You will close the range by using the "Department To" field.

**Action:**
- Click the *Department To* button.
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.

Click the **Show next rows** button.
### Step 21

You may need to scroll down the page to see the last of the **Department** numbers.

Click the scrollbar.
Step | Action
--- | ---
22. | Select the Department number for DFM Admin-Director's Office.

Click the 1732596010 link.

1732596010
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| 23.  | Before you leave the record, make sure you click the **Save** button to save the changes you have just made.  
|      | **Click the **Save** button.** |
| 24.  | **CONGRATULATIONS!**  
|      | You successfully added a new **Fiscal Approver** to this agency.  
|      | **End of Procedure.** |