Training Guide – Travel & Expenses
Workflow Maintenance Supervisor Setup

State of Kansas
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Travel & Expenses

Workflow Maintenance Supervisor Setup

Procedure

An agency Travel & Expenses Maintainer sometimes will need to setup an employee's supervisor as part of the employee's profile.

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| 1.   | The TE Maintainer will set up a new supervisor for an employee if either:  
|      | • The supervisor noted in SMART is not the person who approves Travel & Expenses transactions for the employee, or  
|      | • SMART has no information in the supervisor fields for the employee. (In the instance no supervisor shows in SHaRP, none will show in SMART, either.)  
| 2.   | Before beginning the process of updating an employee’s supervisor, you must know both:  
|      | • The employee’s State of Kansas ID Number, and  
|      | • The State of Kansas ID Number for the supervisor to whom the employee’s Travel & Expenses approvals will be routed.  
<p>|      | Once you have all the information you need, you will go to the Travel &amp; Expenses module. |</p>
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<tr>
<td>3.</td>
<td>From the home page, click on the <strong>Travel and Expenses</strong> link in the Menu.</td>
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<td></td>
<td>Click the <strong>Travel and Expenses</strong> link.</td>
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<td>Step</td>
<td>Action</td>
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<td>4.</td>
<td>SMART opens the Travel and Expenses menu. Click the Manage Employee Information link.</td>
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<td>5.</td>
<td>SMART opens the Manage Employee Information menu. Click the Update Profile link.</td>
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<td>6.</td>
<td>SMART opens the Employee Profile (Edit) page. Be certain the “Find an Existing Value” tab is highlighted.</td>
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<tr>
<td>7.</td>
<td>The State of Kansas Employee ID Number for the person whose profile you are updating goes in the <strong>begins with</strong> field. Click in the <strong>begins with</strong> field.</td>
</tr>
<tr>
<td>8.</td>
<td>Enter the desired information into the <strong>begins with</strong> field. For this simulation, enter <strong>&quot;K0000220288&quot;</strong>.</td>
</tr>
</tbody>
</table>
9. Click the **Search** button.
Step 10. SMART opens the employee profile to the **Employee Data Tab**. There are a series of tabs across the top of the page. To change the supervisor's information, you will go to the **Organizational Data Tab**.

Click the **Organizational Data** tab.
### Step 11.
You will update the employee’s supervisor in the "**Supervisor Information**" box. Most often, this box will be pre-populated by information from SHARP. Changes occurring in SHARP often cause this information to also change in SMART. Manually entering the supervisor's Employee ID number here, though, will leave the information here until it is changed again from this page, even if the employee’s supervisor changes in SHARP.

**Click in the Supervisor Information *ID field.**

![Screen shot of Supervisor Information field](image)

### Step 12.
Type the **State of Kansas Employee ID Number** for the person serving as the employee’s supervisor.

**Enter the desired information into the ID field. For this simulation, enter "**K0000220283**."**

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**Date Created: 01/24/2013**
Step | Action
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13. | To enter the supervisor ID you just typed, you must save this information to SMART. Click the **Right** scrollbar.
### Step 14
Click the **Save** button.

![Save Button](image)

### Step 15
**IMPORTANT**: As a rule of thumb, a supervisor entered into SMART following this process will stay in SMART until updated again.

However, it is highly recommended to check the employee’s profile to make certain the supervisor setting is correct before creating an expense report.

### Step 16
**FANTASTIC!**
You have now completed the process for updating a supervisor in SMART.

*End of Procedure.*