

**State of Kansas**

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# SMART Security Handbook

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Sunflower Project  
Kansas Financial Management System

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**February 26, 2020**

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## Revision History

• Version	• Description of Revision	• Page # in This Version
• June 17, 2019	<ul style="list-style-type: none"> <li>Removed all reference to Control Groups in AP, which have been decommissioned</li> <li>Removed references to overriding AP Match Errors, which will be removed from agency use on 7/1/2019</li> </ul>	• Various
• April 17, 2019	<ul style="list-style-type: none"> <li>Removed “View payment information” from the Central Setoff Maintainer role</li> <li>Added “Update voucher setoff status” to the Central Setoff Maintainer role</li> </ul>	• 22
• April 5, 2019	<ul style="list-style-type: none"> <li>Added “(Regular and Single Payment only)” to the Agency AP Processor Limited role</li> </ul>	• 20
• February 28, 2019	<ul style="list-style-type: none"> <li>Removed “...and revenue refunds for the Department of Revenue” from the Agency AP Processor Limited (KAP_Agy_AP_ProcSSR_Lmtd) role. KDOR should request the Agency AP Processor role for this purpose.</li> </ul>	• 20
• February 12, 2018	<ul style="list-style-type: none"> <li>Added more detail to voucher Origin section</li> </ul>	• 17
• November 29, 2016	<ul style="list-style-type: none"> <li>Corrected spelling from “Requestor” to “Requester” to be consistent with PeopleSoft online pages</li> </ul>	• Various
• October 16, 2016	<ul style="list-style-type: none"> <li>Removed Data Warehouse roles until new BI Analytics tool is available to users</li> </ul>	• 57
• September 6, 2016	<ul style="list-style-type: none"> <li>Added Central Supplier Contract Viewer role</li> </ul>	• 54
• December 31, 2015	<ul style="list-style-type: none"> <li>Added technical role names beneath each User Role to align with the security role report the SMART Security Team provides upon request. For example:  <b>Agency Asset Processor (KAM_Agy_Asset_Processor)</b></li> </ul>	• Various



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<ul style="list-style-type: none"> <li>Version</li> </ul>	<ul style="list-style-type: none"> <li>Description of Revision</li> </ul>	<ul style="list-style-type: none"> <li>Page # in This Version</li> </ul>
<ul style="list-style-type: none"> <li>October 14, 2015</li> </ul>	<ul style="list-style-type: none"> <li>Added the following roles due to 9.2 upgrade:               <ul style="list-style-type: none"> <li>Central Voucher Workflow Administrator</li> <li>Agency Customer Contracts Separate Billing/Revenue Maintainer</li> <li>Central Customer Contracts Separate Billing/Revenue Maintainer</li> <li>Central Requisition Workflow Administrator</li> <li>External Supplier User</li> <li>External Supplier Administrator</li> <li>Internal Supplier Administrator</li> <li>Central PO Service Desk</li> <li>Central T&amp;E Workflow Administrator</li> <li>Agency Chartfield Approver</li> <li>Central Chartfield Approver</li> <li>Central Journal Workflow Administrator</li> <li>Central Chartfield Request Workflow Administrator</li> <li>Agency Grants Portal Administrator</li> <li>Central Event Workflow Administrator</li> <li>Event Bidder</li> <li>Event Supplier</li> <li>Event Guest</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>22</li> <li>26</li> <li>34</li> <li>39</li> <li>42</li> <li>43</li> <li>44</li> <li>55</li> <li>56</li> </ul>
<ul style="list-style-type: none"> <li>January 23, 2015</li> </ul>	<ul style="list-style-type: none"> <li>Removed "KDWPT" from Project Costing "Agency Custom Projects Maintainer" role. This role can be requested by any agency.</li> </ul>	<ul style="list-style-type: none"> <li>39</li> </ul>
<ul style="list-style-type: none"> <li>January 7, 2014</li> </ul>	<ul style="list-style-type: none"> <li>Updated to remove references to "Instructor Led Training" as it is no longer offered</li> <li>Updated to reflect name change from "SMART Help Desk" to "Kansas Service Desk"</li> <li>Updated to reflect name change from "Division of Accounts and Reports" to "Office of Systems Management"</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
<ul style="list-style-type: none"> <li>May 24, 2011</li> </ul>	<ul style="list-style-type: none"> <li>Updated 2.2 Complete Required Training</li> <li>Updated 2.3 Receive Notification of Security Activation</li> </ul>	<ul style="list-style-type: none"> <li>6</li> <li>6</li> </ul>



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<ul style="list-style-type: none"> <li>November 1, 2010</li> </ul>	<ul style="list-style-type: none"> <li>“Instructor Led Training” is added to each role where required</li> <li>Sections are cross referenced to Form row number</li> <li>Fields that are required are so indicated “(Required)”</li> <li>Clarification that Only <u>ONE</u> Form may be attached to a Request/Ticket.</li> <li>Explanation for missing User ID</li> <li>Field Name changed to “Inactivate User”</li> <li>Clarification of “Agency Requester” and “Agency Purchasing Approver” limitations</li> <li>Information regarding Kansas Buyer actions for absentee</li> <li>Deleted Kansas P-Card Administrator</li> </ul>	<ul style="list-style-type: none"> <li>5</li> <li>8</li> <li>9</li> <li>44</li> <li>46</li> <li>46</li> </ul>
<ul style="list-style-type: none"> <li>June 30, 2010</li> </ul>	<ul style="list-style-type: none"> <li>Updated the Agency AP Approver role. Agency will still do the set up if it’s in Set A and/or Set B. But, OSM will have to set up the approver at the Fiscal Office level.</li> <li>Updated the Agency T&amp;E Approver role. Agency will still do the set up if it’s in Set A and/or Set B. But, OSM will have to set up the approver at the Fiscal Office level.</li> <li>Updated 2.2 Complete Required Training</li> </ul>	<ul style="list-style-type: none"> <li>15</li> <li>21</li> <li>6</li> </ul>
<ul style="list-style-type: none"> <li>June 23, 2010</li> </ul>	<ul style="list-style-type: none"> <li>Original Draft</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>



## 1.0 Introduction to Agency Security

The purpose of this document is to describe the process by which agencies can change their employees' access to the Statewide Management, Accounting and Reporting Tool (SMART). This document describes the Security Request Process and contains instructions for completing the SMART Security Access Form.

The Security Request Process allows you to update individual user security. Refer to the SMART *Web* website ([www.smartweb.ks.gov](http://www.smartweb.ks.gov)) or the Kansas Service Desk for information on other changes such as creating a new origin code, updating Department IDs, or configuring your agency for an additional SMART module.

## 2.0 Security Request Process

The Security Request Process allows agencies to define SMART security access for new SMART users, change security access for existing SMART users, and delete users. This section of the Agency Security Handbook outlines the SMART security access process and describes agency responsibilities in the process.

### 2.1 Submit a SMART Access Form

The Agency SMART Security Liaison is responsible for submitting SMART Security Access Forms on behalf of the agency's users. As a security measure, SMART Security Access Forms will only be accepted when submitted by your agency's designated SMART Security Liaison. The agency Chief Financial Officer (or agency designee) may contact the Kansas Service Desk to update your agency's designated SMART Security Liaison.

All SMART Security Access Forms are subject to approval by the Department of Administration, Office of Systems Management (OSM). In order to be approved, forms must meet the following requirements:

- Forms must be filled out completely and accurately
- Forms must be submitted by the agency's designated SMART Security Liaison
- Forms must be attached to a new Kansas Service Desk incident logged online (<http://www.smartweb.ks.gov/kansas-service-desk/service-desk-detail>). Select the category "Security" and the subcategory "New, or Changed Security". Create a separate incident for each form

- Forms must reference only one user ID. To update multiple users, a separate form is required for each user profile being updated. **Only ONE Form may be attached to a Request/Ticket.**

Failure to follow these requirements will delay processing of the SMART Security Access Forms and may cause the request to be denied.

## 2.2 Complete Required Training

Before access can be granted, the user is required to complete all required online SMART training and On-the-Job Training, as defined by the user's home agency. **IMPORTANT:** It is the agency's responsibility to make sure the user has completed all required training before security is requested.

## 2.3 Receive Notification of Security Activation

When processing is completed, OSM will notify the agency by closing the Service Desk incident. This sends an automatic notification to the Agency Security Liaison who opened the incident request.

## 2.4 Complete Agency Setup

In some instances, agencies have additional setup to complete before the user is ready to access SMART. In these instances, the notification from OSM will describe the additional setup to be completed. This setup should be completed before the user logs in to SMART for the first time.

## 2.5 Call Kansas Service Desk to Receive Password

The Agency SMART Security Liaison is responsible for notifying users that the SMART Security Access Form has been processed. The new user will have to call the Kansas Service Desk to be authenticated and given an initial password. Upon logging into the system for the first time, the user will be prompted to change this password. SMART logons of any users who fail to login for 90 days or more will become locked. They will have to call the Kansas Service Desk for a password reset. The Kansas Service Desk number is 785-368-8000.

## 3.0 SMART Security Access Form

This section will be a step-by-step guide of how to fill out the Security Access Form.

### 3.1 User Information (Form Row No. 14)

Field Name	Field Description
Name	Provide the user's name who needs the security access.
Email	Provide the user's email who needs the security access.



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Field Name	Field Description
Employee ID	Provide the user's employee ID who needs the security access.
UserID	<p><b>(Required)</b> If the User exists in SHARP or SMART, provide their user ID which will be updated.</p> <p>If an existing employee needs to add an additional user ID, leave this field blank, and select New Hire/New User as the Request Type.</p>
User Type	Select the checkbox that corresponds with the user who needs security access.
Non State Employee Reason	<p>If the user is a non state employee, you will specify the reason they need access to SMART. Also, if the user is a non state employee, specify what role they are. (Ex. Contractor, Auditor, etc.)</p> <p><b>NOTE:</b> All non-state employee access to SMART will be subject to approval by OSM.</p>
Business Unit(s)	<p>List all Business Units the user needs access/updates in or enter 'ALL' for statewide.</p> <p><b>IMPORTANT:</b> The changes in this form will apply to all Business Units associated with this user profile. To create different access in different Business Units, submit another form to request a new user profile.</p>
Multiple Business Unit Reason	<p>If the user needs security access to multiple Business Units, you will need to specify the reason they need access to these respective Business Units.</p> <p><b>NOTE:</b> This is subject to approval from the listed agencies, as well as OSM.</p>

## 3.2 Requesting Agency Information (Form Row No. 24)

Field Name	Field Description
Agency Name	Provide the name of the agency. This should be the agency that is filling out the form.
Security Liaison	Provide the Agency's Security Liaison's name here.



### 3.3 SHARP Information (Form Row No. 29)

This information will be used to help match the new user with an existing user ID, if one exists.

Field Name	Field Description
User already has a SHARP user ID (enter SHARP user ID above)	The SMART access being requested in this form will be added to the existing user ID.
SHARP access is being requested	The SMART access being requested in this form and the new SHARP access will be added to the same user ID.  A separate form will be used for SHARP access.
Not a SHARP user	The SMART access being requested in this form will not be combined with any SHARP access.

### 3.4 Request Type (Form Row No. 38)

This information will be used to determine how your request will be processed.

Field Name	Field Description
New Hire/New User	A new user profile will be created with the information provided in this form.
Current User has SMART Access but no User ID	Select if applicable to explain missing User ID
Transfer/Job Change/Rehire	All existing security settings will be removed and replaced with the information provided in this form. You may only select this option if a user profile exists. <b>(USER ID REQUIRED)</b>
Update Existing User	All existing security settings will be maintained, and the changes identified in this form will also be applied. You may only select this option if a user profile exists.
Inactivate User	All security will be removed and the user will be deleted. No additional information is needed below this section of the form.  <b>Note:</b> It is the responsibility of the agency to remove access for people who leave the agency.



Field Name	Field Description
Reactivate User	When a user has not logged into SMART in 90 days, their account will be locked and a SMART Security Access Form will have to be submitted to the Kansas Service Desk to request the user be reactivated. All existing security settings will be retained upon reactivation.

### 3.5 User Role and Preferences Selection

In this section, you will select Add or Remove from the drop down next to the roles to be updated for this user. Where applicable and indicated on the form, workflow, setting and configuration items must be completed for this user.

#### 3.5.1 Asset Management - Agency Roles (Form Row No. 56)

User Role	Users have the ability to:
<b>Agency Asset Processor</b> <b>(KAM_Agy_Asset_Processor)</b>	<ul style="list-style-type: none"> <li>• Enter and update an asset</li> <li>• Enter Capital Leases and Operating Leases</li> <li>• View asset information including basic information, acquisition details, cost/book information, and depreciation information</li> <li>• Establish, view, and update Parent/Child relationships</li> <li>• Copy assets</li> <li>• Print an asset</li> <li>• View and process asset information that originated in the Accounts Payable, Purchasing, and Project Costing modules</li> <li>• Consolidate and unitize asset information that originated in the Accounts Payable and Purchasing modules</li> <li>• Review Transaction Loader Process</li> <li>• Run Transaction Loader Process (AMIF1000)</li> <li>• Establish property asset relationships</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<p><b>Agency Depreciation Processor</b> (KAM_Agy_Depreciation_Processor)</p>	<ul style="list-style-type: none"> <li>• Run and view depreciation only for their agency</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by users who need access to the following agency-specific books:</p> <ul style="list-style-type: none"> <li>• DISC – DISC Book</li> <li>• DFM – Div of Facilities Mgmt Book</li> <li>• LOTTERY – Kansas Lottery Book</li> <li>• DBHS – SRS Health Services Book</li> <li>• KSDE – Department of Education Book</li> <li>• KCI – Correctional Industries Book</li> <li>• KPERS – KPERS Book</li> <li>• KDOL – Department of Labor Book</li> </ul>
<p><b>Kansas Assets Viewer</b> (KAM_KS_Assets_Viewer)</p>	<ul style="list-style-type: none"> <li>• View all physical and financial asset data</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency Adjuster, Transfer, Retirement Processor</b> (KAM_Agy_Adjr_Trfr_Ret_Prcr)</p>	<ul style="list-style-type: none"> <li>• Adjust asset cost information</li> <li>• Perform cost addition</li> <li>• Perform IntraUnit transfer</li> <li>• Perform asset recategorizations</li> <li>• Retire an asset</li> <li>• Process a Disposal Worksheet</li> <li>• Reinstate assets</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<b>Agency Configuration Maintainer</b> <b>(KAM_Agy_Config_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Update and maintain Agency configuration values               <ul style="list-style-type: none"> <li>• Standard Warranty and Warranty Templates</li> <li>• Maintenance Types</li> <li>• Financing Codes</li> <li>• Insurance Types</li> <li>• User-Defined Attributes</li> <li>• Area ID's</li> </ul> </li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Asset Maintainer</b> <b>(KAM_Agy_Asset_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Add and update asset insurance, maintenance, warranties, meter readings, and repairs</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>

### 3.5.2 Asset Management - Central Roles (Form Row No. 63)

User Role	Users have the ability to:
<b>Central Configuration Maintainer</b> <b>(KAM_Cen_Config_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Update and maintain Central configuration value:               <ul style="list-style-type: none"> <li>• Asset books</li> <li>• Asset profiles</li> <li>• Accounting entry templates</li> <li>• Asset category</li> <li>• Asset subtypes</li> <li>• Area IDs</li> </ul> </li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central Month-end Processor (KAM_Cen_Month_End_Processor)</b>	<ul style="list-style-type: none"> <li>• Process month-end transactions:               <ul style="list-style-type: none"> <li>• Close accounting periods</li> <li>• View asset journals</li> <li>• View financial entries</li> <li>• Process depreciation</li> <li>• Create accounting entries</li> <li>• Manage depreciation process log</li> <li>• Open review transactions</li> <li>• Adjust accumulated depreciation</li> <li>• View depreciation</li> <li>• Change/delete pending transactions</li> </ul> </li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central Asset Processor (KAM_Cen_Asset_Processor)</b>	<ul style="list-style-type: none"> <li>• Access all pages available to the Agency Asset Processor role with correction mode</li> <li>• Perform all functions available to the Agency Asset Processor and Agency Adjustment, Transfer, and Retirement Processor</li> <li>• Perform InterUnit transfer</li> <li>• Has edit ability on the interface tables</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central AM Batch Processor (KAM_Cen_Batch_Processor)</b>	<ul style="list-style-type: none"> <li>• Run batch processes on ad hoc basis</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas Assets Viewer</li> <li>• Kansas GL Viewer</li> </ul>



### 3.5.3 Accounts Payable – Agency Roles (Form Row No. 69)

User Role	Users have the ability to:
<p><b>Agency AP Processor</b> (KAP_Agy_AP_Processor)</p>	<ul style="list-style-type: none"> <li>• Create and update vouchers</li> <li>• View vouchers</li> <li>• Run matching for vouchers</li> <li>• Run budget check</li> <li>• View budget check exceptions</li> </ul> <p>Users with this role must also have the following role: Kansas GL Viewer</p> <p>Users with the role also require these additional settings listed below:</p>
	<p><b><i>Process Template Vouchers</i></b></p> <p>Selecting Yes gives the user the ability to process template vouchers.</p> <p>Provides user the authority to create template vouchers. Template vouchers are used to improve data entry efficiency if you receive multiple similar invoices from the same vendor.</p>
	<p><b><i>Process Reversal Vouchers</i></b></p> <p>Selecting Yes gives the user the ability to process reversal vouchers.</p> <p>Provides user the authority to create reversal vouchers. Reversal vouchers allow you to back out incorrect vouchers that have or have not been posted as well as restore the encumbrance and reduce the PO.</p>
	<p><b><i>Change Voucher Due Date</i></b></p> <p>Selecting Yes gives the user the ability to change the voucher due date.</p> <p>Provides the user the authority to manually schedule a payment by overriding the calculated voucher due date.</p>



User Role	Users have the ability to:
	<p><b><i>Process Journal Vouchers</i></b></p> <p>Selecting Yes gives the user the ability to process journal vouchers.</p> <p>Provides user the authority to create journal vouchers. Journal vouchers are used to adjust accounting entries for vouchers that have been posted and paid and for vouchers whose payments have also been posted.</p> <hr/> <p><b><i>Change Accounting Date</i></b></p> <p>Selecting Yes gives the user the ability to change the accounting date.</p> <p>Provides user the authority to override the default accounting date.</p> <hr/> <p><b><i>Record Manual Payments</i></b></p> <p>Selecting Yes gives the user the ability to record manual payments.</p> <p>Provides user the authority to record manual payments. When you create a manual payment, you create a voucher in SMART, but apply it to a payment made outside of SMART rather than creating a payment in SMART. An example of a manual payment is petty cash payment.</p> <hr/> <p><b><i>Process Single Payment Vouchers</i></b></p> <p>Selecting Yes gives the user the ability to process single payment vouchers.</p> <p>Provides user the authority to create single payment vouchers. Single payment vouchers are used to make a payment to a one-time vendor without having to add them to the Vendor Master List.</p>



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User Role	Users have the ability to:
	<p><b>Process Regular Vouchers</b></p> <p>Selecting Yes gives the user the ability to process regular vouchers.</p> <p>Provides user the authority to create regular vouchers. Regular vouchers are the standard voucher type.</p> <hr/> <p><b>Process Adjustment Vouchers</b></p> <p>Selecting Yes gives the user the ability to create adjustment vouchers.</p> <p>Adjustment vouchers are one of six available voucher types. They are used to adjust existing non-purchase order vouchers or to relate two vouchers to each other.</p> <hr/> <p><b>Origin (Required)</b></p> <p>This three-digit origin code determines the workflow path for vouchers entered by the user. Each user ID can only have one origin code.</p> <p>Most SMART users should use a default origin of 'ONL' (online voucher). Certain agencies may have other origins beginning with 'O' to accomplish specific voucher workflow routing. <b>No user should have a default origin beginning with 'I'.</b></p> <p>You may only enter an existing origin. If you want to set up a new origin, you will need to contact the Kansas Service Desk.</p>
<p><b>Agency AP Supervisor</b> (KAP_Agy_AP_Supervisor)</p>	<ul style="list-style-type: none"> <li>• Post and unpost vouchers</li> <li>• Close vouchers</li> <li>• Delete vouchers</li> <li>• Place and release payment hold status</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Agency AP Approver</b> <b>(KAP_Agy_AP_Approver)</b>	<ul style="list-style-type: none"> <li>View, approve, and deny vouchers in Workflow.</li> </ul> <p>Set A and/or Set B - Once Agency AP Approver is set up, the Agency AP Workflow Maintainer must place the approver in the appropriate workflow step (Set A and/or Set B) and origin.</p> <p>Fiscal Office – The Agency AP Approver is set up for Fiscal Office by OSM.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Agency AP Processor</li> <li>Kansas GL Viewer</li> </ul>
<b>Agency Vendor Processor</b> <b>(KAP_Agy_Vendor_Processor)</b>	<ul style="list-style-type: none"> <li>Create vendor</li> <li>Maintain vendor conversations (used to record conversations with vendors when resolving disputes)</li> <li>Search for a vendor</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency AP Workflow Maintainer</b> <b>(KAP_Agy_AP_WF_Maintainer)</b>	<ul style="list-style-type: none"> <li>Maintain voucher workflow</li> <li>Maintain voucher workflow errors</li> <li>Maintain voucher approval assignments</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Kansas AP Viewer</b> <b>(KAP_KS_AP_Viewer)</b>	<ul style="list-style-type: none"> <li>View vouchers and payments</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency AP Interfund Processor</b> <b>(KAP_Interfund_Processor)</b>	<ul style="list-style-type: none"> <li>Create and update interfund vouchers</li> <li>View interfund vouchers</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency AP Interfund Approver</b> <b>(KAP_Interfund_Approver)</b>	<ul style="list-style-type: none"> <li>Approve interfund vouchers</li> <li>View interfund vouchers</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<p><b>Agency AP Maintainer</b> (KAP_Agy_AP_Maintainer)</p>	<ul style="list-style-type: none"> <li>• Manage the matching process</li> <li>• Run budget checking</li> <li>• Manage budget check exceptions</li> <li>• Correct voucher build errors</li> <li>• Post a voucher</li> <li>• Monitor errors (posting, budget checking, matching)</li> <li>• Generate AP journals</li> <li>• Run match/error reports, check budget error reports, and maintain tables</li> <li>• Add and maintain Set A and Set B approvers</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Kansas Vendor Viewer</b> (KAP_KS_Vendor_Viewer)</p>	<ul style="list-style-type: none"> <li>• View vendor name, address, withholding, and bank information</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency TR Revenue Viewer KDOR</b> (KAP_AGY_TR_REVENUE_VIEWER)</p>	<ul style="list-style-type: none"> <li>• View Dept. of Revenue checks generated outside of SMART on the external transaction pages</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>• Kansas Department of Revenue</li> </ul>
<p><b>Agency AP Processor Limited</b> (KAP_Agy_AP_Procssr_Lmtd)</p>	<ul style="list-style-type: none"> <li>• Create and update vouchers (Regular and Single Payment only)</li> <li>• View vouchers</li> <li>• Run budget check</li> <li>• View budget check exceptions</li> </ul> <p>Users with this role can process vouchers associated with Imprest/Petty Cash accounts.</p> <p>Note: User mapped to this role must be associated with an Imprest/Petty Cash account.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Agency AP Processor Additional Voucher Fields (KAP_AGY_AP_PROCESS_ADVCHR_FLDS)</b>	Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Treasurer (TR) Payroll Viewer SHARP Core (KAP_AGY_TR_PAYROLL_VIEWER)</b>	<ul style="list-style-type: none"> <li>• View payroll checks only on the external transaction pages</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> This role may only be selected by employees of the following: <ul style="list-style-type: none"> <li>• Core SHARP users</li> </ul>

### 3.5.4 Accounts Payable – Central Roles (Form Row No. 100)

User Role	Users have the ability to:
<b>Central Paycycle Processor (KAP_Cen_PayCycle_Processor)</b>	<ul style="list-style-type: none"> <li>• Create/update paycycle selection criteria</li> <li>• Run paycycle manager</li> <li>• Process express payment</li> <li>• View and correct paycycle errors</li> <li>• Place and release payment hold</li> <li>• Process expense payments</li> <li>• Cancel payments</li> <li>• Post payments</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central AP Maintainer (KAP_Cen_AP_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Run voucher build</li> <li>• Manage voucher build errors</li> <li>• Maintain voucher errors</li> <li>• Establish control group</li> <li>• Update control group status</li> <li>• Delete control group</li> <li>• Post control group-Ability to setup and maintain control groups</li> <li>• Manage the matching process</li> <li>• Run budget checking</li> <li>• Manage budget check exceptions</li> <li>• Generate journals</li> <li>• Run match/error reports, check budget error reports, and maintain tables</li> <li>• Add and maintain Set A and Set B approvers</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central AP Auditor (KAP_CEN_AP_AUDITOR)</b>	<ul style="list-style-type: none"> <li>• Run AP financial reports</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central AP Approver – Delegated Audit Team, Office of the Chief Financial Officer (KAP_CEN_AP_A_R_APPR)</b>	<ul style="list-style-type: none"> <li>• View, approve, and deny vouchers</li> <li>• Approve, View, and deny vouchers (unlimited authority)</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central AP Workflow Maintainer (KAP_Cen_AP_WF_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Maintain voucher workflow</li> <li>• Maintain voucher workflow errors</li> <li>• Maintain voucher approval assignments</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central 1099 Processor</b> <b>(KAP_Cen_1099_Processor)</b>	<ul style="list-style-type: none"> <li>• Post withholdings</li> <li>• Adjust withholding vouchers/payments</li> <li>• Adjust vendor withholding information</li> <li>• Print/reprint 1099s</li> <li>• Process and adjust 1099s</li> <li>• Maintain tables</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Vendor Approver</b> <b>(KAP_Cen_Ven_Approver)</b>	<ul style="list-style-type: none"> <li>• Approve vendors</li> <li>• Place a vendor on hold</li> <li>• Release vendor hold</li> <li>• Create/update vendor Information</li> <li>• Inactivate a vendor</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central SetOff Maintainer</b> <b>(KAP_Setoff_AP_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Update voucher setoff status</li> <li>• View voucher information</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central AP Batch Processor</b> <b>(KAP_CEN_AP_BATCH)</b>	<ul style="list-style-type: none"> <li>• Run batch processes on ad hoc basis</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Payment Maintainer</b> <b>(KAP_Cen_Payment_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Post payments</li> <li>• Cancel payments</li> <li>• Escheat payments</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Voucher Workflow Administrator</b> <b>(KAP_CEN_WF92_VCHR)</b>	<ul style="list-style-type: none"> <li>• Re-route vouchers stuck in workflow</li> </ul> <p>This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team AP analysts</p>



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User Role	Users have the ability to:
<b>Central TR Processor (KAP_CEN_TR_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Run INF47 (Inbound Redeemed Checks Interface)</li> <li>• Create/update bank statements online</li> <li>• View bank statements</li> <li>• Run Automatic Reconciliation Process</li> <li>• Use Semi-Manual Reconciliation</li> <li>• View payment information (SMART issued payments)</li> <li>• View exceptions resulting from run of Automatic Reconciliation online</li> <li>• Run all designated TR Reports</li> <li>• Create/update external transactions (External System issued checks)</li> <li>• Escheat SMART issued checks</li> <li>• Escheat External transactions</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central TR Supervisor (KAP_CEN_TR_SUPERVISOR)</b>	<ul style="list-style-type: none"> <li>• View bank statements online</li> <li>• Run all designed TR reports</li> <li>• View external transactions online</li> <li>• View payments online (SMART issued checks)</li> <li>• Run INF47 (Inbound Redeemed Checks Interface)</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central TR Viewer (KAP_CEN_TR_VIEWER)</b>	<ul style="list-style-type: none"> <li>• View bank statements online</li> <li>• Run all designed TR reports</li> <li>• View external transactions online</li> <li>• View payments online (SMART issued checks)</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>

### 3.5.5 Accounts Payable - Imprest/Petty Cash Accounts (Form Row No. 112)

Field Name	Field Description
<b>Bank Name</b>	<ul style="list-style-type: none"> <li>• Enter the bank name associated to the user ID</li> </ul>
<b>Account Number</b>	<ul style="list-style-type: none"> <li>• Enter the account number associated to the bank name</li> </ul>



Field Name	Field Description
Account Description	<ul style="list-style-type: none"> <li>Enter the account description associated to the bank name.</li> </ul>

### 3.5.6 Travel and Expense – Agency Roles (Form Row No. 126)

User Role	Users have the ability to:
<b>Agency T&amp;E Approver</b> <b>(KAP_Agy_T_E_Approver)</b>	<ul style="list-style-type: none"> <li>Approve travel &amp; expense reports</li> <li>Deny travel &amp; expense reports</li> <li>Modify travel &amp; expense reports</li> </ul> <p>Supervisor and/or Department - Once Agency T&amp;E Approver is set up, the agency Agency T&amp;E Workflow Maintainer must place the approver in the appropriate workflow step (Supervisor and/or Department Fiscal Office)..</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency Expense Processor</b> <b>(KAP_Agy_Expense_Processor)</b>	<ul style="list-style-type: none"> <li>Create and update travel &amp; expense reports</li> <li>Print travel &amp; expense reports</li> <li>Update user defaults</li> <li>View travel &amp; expense reports</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency T&amp;E Maintainer</b> <b>(KAP_Agy_T_E_Maintainer)</b>	<ul style="list-style-type: none"> <li>View payments</li> <li>Stage and unstage payments</li> <li>Close expenses</li> <li>Mark travel &amp; expense reports for closure</li> <li>Transfer expenses payments to paycycle</li> <li>Cancel travel authorizations</li> <li>View and adjust accounting entries</li> <li>Run budget checking</li> <li>View budget exceptions</li> <li>Process employee notifications</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<b>Agency Expense Proxy (KAP_Agy_Expense_Proxy)</b>	<ul style="list-style-type: none"> <li>• Create and update travel &amp; expense reports</li> <li>• Create and update travel &amp; expense reports as a proxy</li> <li>• Print travel &amp; expense reports</li> <li>• Update employee defaults</li> <li>• View travel &amp; expense reports</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency T&amp;E Workflow Maintainer (KAP_Agy_T_E_WF_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Maintain expense workflow</li> <li>• Maintain expense workflow errors</li> <li>• Maintain expense approval assignments</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>

### 3.5.7 Travel and Expense – Central Roles (Form Row No. 135)

User Role	Users have the ability to:
<b>Central T&amp;E Maintainer (KAP_Cen_T_E_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Manage employee data</li> <li>• Maintain travel &amp; expense workflow</li> <li>• View payments</li> <li>• Stage/unstage payments</li> <li>• Close expenses</li> <li>• Post/close/cancel liabilities</li> <li>• Transfer expenses payments to paycycle</li> <li>• Cancel travel authorizations</li> <li>• View/adjust accounting entries</li> <li>• Process budget checking</li> <li>• View budget exceptions</li> <li>• Process employee notifications</li> <li>• Define expense system</li> <li>• Update paid statuses</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central T&amp;E Workflow Maintainer</b> <b>(KAP_Cen_T_E_WF_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Maintain expense workflow</li> <li>• Maintain expense workflow errors</li> <li>• Maintain expense approval assignments</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central T&amp;E Approver</b> <b>(KAP_CEN_TE_APPR)</b>	<ul style="list-style-type: none"> <li>• Approve travel &amp; expense reports</li> <li>• Deny travel &amp; expense reports</li> <li>• Modify travel &amp; expense reports</li> </ul> <p>This user is part of a pool of approvers within Accounts &amp; Reports. This user approves or denies expense reports and cash advances and has final approval for:</p> <ul style="list-style-type: none"> <li>• Cash Advances more than \$5,000</li> <li>• Expense Reports more than \$5,000</li> <li>• Expense Reports that have been matched against the SetOff debtor file</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central T&amp;E Workflow Administrator</b> <b>(KAP_CEN_WF92_EX)</b>	<ul style="list-style-type: none"> <li>• Re-route expense reports stuck in workflow</li> <li>• This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team EX analysts</li> </ul>

### 3.5.8 Accounts Receivable – Agency Roles (Form Row No. 141)

User Role	Users have the ability to:
<b>Agency Customer Creator</b> <b>(KAR_Agy_Customer_Creator)</b>	<ul style="list-style-type: none"> <li>• Create, update customers and customer contact information</li> <li>• Create and update interfund contact information</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<p><b>Agency Pending Item Processor (KAR_Agy_Item_Processor)</b></p>	<ul style="list-style-type: none"> <li>• Create and update Pending Items, credit, and debit memos</li> <li>• Review online and external pending items</li> <li>• Change pending group action for online and external items</li> <li>• Create and update maintenance and transfer worksheets</li> <li>• Create Aging Summary by Business Unit report</li> <li>• Review Unit History</li> <li>• Correct posting errors for online and external pending items, worksheets, and transfers</li> <li>• Unpost online, external, maintenance, and transfer groups</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency AR Administrator (KAR_Agy_Admin)</b></p>	<ul style="list-style-type: none"> <li>• Approve deposits</li> <li>• Create and update customer and customer contact information</li> <li>• Modify accounting entries for direct journal deposits</li> <li>• View all information on customer accounts</li> <li>• Generate customer statements, dunning letters, and follow-up letters</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Deposit Processor</li> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency Billing Processor (KAR_Agy_Billing_Processor)</b></p>	<ul style="list-style-type: none"> <li>• Create pro formas</li> <li>• Generate installment and recurring bills</li> <li>• Create consolidated headers and attach/detach invoices</li> <li>• Enter bills online using Standard or Express Billing and correct minor billing interface errors</li> <li>• Research bills, adjust bills, preprint bills, and copy bills</li> <li>• Run bill status change to update the status of bills</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Agency Deposit Processor</b> <b>(KAR_Agy_Deposit_Processor)</b>	<ul style="list-style-type: none"> <li>• Enter and update deposits</li> <li>• View item activity from a payment and item activity summary on customer account</li> <li>• Create payment worksheets</li> <li>• Correct interfaced deposits</li> <li>• Create accounting entries for direct journal deposits</li> <li>• Review payments</li> <li>• View and update customer conversations on a customer account</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency AR Maintainer</b> <b>(KAR_Agy_Maintainer)</b>	<ul style="list-style-type: none"> <li>• View pending items, and payment information</li> <li>• View all information on customer account</li> <li>• Generate customer statements, dunning letters, and follow-up letters</li> <li>• Enter and maintain customer conversation on customer account</li> <li>• Create and update maintenance and transfer worksheets</li> <li>• Correct posting errors for items, payments, and worksheets</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Billing Configurator</b> <b>(KAR_Agy_Billing_Configurator)</b>	<ul style="list-style-type: none"> <li>• Maintain agency-configured values for Billing such as bill types, charge codes, distribution codes, and bill inquiry phone for invoices</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency AR Interfund Processor</b> <b>(KAR_Agy_Interfund_Processor)</b>	<ul style="list-style-type: none"> <li>• Create the deposit side of Interfunds</li> <li>• View interfund payments and deposit information</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas AR Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Agency AR Configurator</b> <b>(KAR_Agy_Configurator)</b>	<ul style="list-style-type: none"> <li>• Setup and maintain agency configuration values such as:               <ul style="list-style-type: none"> <li>• Reason codes</li> <li>• Dunning methods</li> <li>• Speedcharts</li> <li>• Standard notes</li> <li>• Note types</li> <li>• AR Specialist</li> </ul> </li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Billing Administrator</b> <b>(KAR_Agy_Billing_Admin)</b>	<ul style="list-style-type: none"> <li>• Enter and maintain bills</li> <li>• Finalize and Print consolidated and non-consolidated invoices</li> <li>• Enter and maintain customer and customer contact information</li> <li>• Review and update billing interface transactions</li> <li>• Correct billing accounting errors</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Billing Processor</li> <li>• Kansas GL Viewer</li> </ul>
<b>Agency AR Interfund Approver</b> <b>(KAR_Agy_Interfund_Approver)</b>	<ul style="list-style-type: none"> <li>• Approve the deposit side of Interfunds</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Interfund Processor</li> <li>• Kansas AR Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas AR Viewer</b> <b>(KAR_KS_Viewer)</b>	<ul style="list-style-type: none"> <li>• View pending items, deposits, worksheets, and customer accounts</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas Billing Viewer</b> <b>(KAR_KS_Billing_Viewer)</b>	<ul style="list-style-type: none"> <li>• View all billing and interface transactions</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Agency Refund Processor SRS</b> <b>(KAR_Agy_Refund_Processor)</b>	<ul style="list-style-type: none"> <li>Process refunds</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>Kansas Department of Social &amp; Rehabilitation Services</li> </ul>

### 3.5.9 Accounts Receivable – Central Roles (Form Row No. 153)

User Role	Users have the ability to:
<b>Central Approver – Delegated Audit Team, Office of the Chief Financial Officer</b> <b>(KAR_Cen_Accts_Rpts_Approver)</b>	<ul style="list-style-type: none"> <li>Approve deposit adjustments</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Agency Deposit Processor</li> <li>Kansas GL Viewer</li> </ul>
<b>Central Approver – Treasurer</b> <b>(KAR_Cen_Appr_Treasurer)</b>	<ul style="list-style-type: none"> <li>Approve deposits, not related to adjustments or interfunds, for the Treasurer</li> <li>Enter and maintain Merchant ID's</li> <li>Perform daily release of revenue</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Agency Deposit Processor</li> <li>Kansas GL Viewer</li> </ul>
<b>Central AR Configurator</b> <b>(KAR_Cen_Configurator)</b>	<ul style="list-style-type: none"> <li>Create and maintain centrally controlled accounts receivable configuration values</li> <li>Correct history for effective dated rows</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Central Billing Configurator</b> <b>(KAR_Cen_Billing_Configurator)</b>	<ul style="list-style-type: none"> <li>Create and maintain centrally controlled billing configuration values</li> <li>Correct history for effective dated rows</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<b>Central AR Batch Processor</b> <b>(KAR_CEN_BATCH_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Run batch processes on ad hoc basis</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>

### 3.5.10 General Ledger – Agency Roles (Form Row No. 159)

User Role	Users have the ability to:
<b>Kansas GL Approver – Level 1</b> <b>(KGL_AGY_GL_APPROVER_L1)</b>	<ul style="list-style-type: none"> <li>• Create, copy, and approve online journals</li> <li>• Define and create standard journals</li> <li>• View standard journals</li> <li>• Import spreadsheet journals</li> <li>• Edit journals</li> <li>• Budget check journals</li> </ul> <p>This user is part of the first pool of agency approvers. This user approves or denies journal vouchers and does not have final approval authority.</p> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas GL Processor</li> </ul>
<b>Kansas GL Processor</b> <b>(KGL_KS_GL_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Create online journals</li> <li>• Copy journals</li> <li>• Define and create standard journals</li> <li>• View standard journals</li> <li>• Import spreadsheet journals</li> <li>• Edit journals</li> <li>• Budget check journals</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Budget Processor</b> <b>(KGL_AGY_BUDGET_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Maintain agency budgets from IBARS</li> <li>• Enter agency budget journals</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<p><b>Kansas GL Approver – Level 2 (KGL_AGY_GL_APPROVER_L2)</b></p>	<ul style="list-style-type: none"> <li>• Create, copy, and approve online journals</li> <li>• Define and create standard journals</li> <li>• View standard journals</li> <li>• Import spreadsheet journals</li> <li>• Edit journals</li> <li>• Budget check journals</li> </ul> <p>This user is part of the second pool of agency approvers. This user approves or denies journal vouchers and does not have final approval authority.</p> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas GL Processor</li> </ul>
<p><b>Kansas Reporting Ledger Approver (KGL_KS_REPORTING_LEDGER_AP)</b></p>	<ul style="list-style-type: none"> <li>• Post journals</li> <li>• Run open period update and open period mass update for reporting ledgers</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas Reporting Ledger Processor</li> </ul> <p>This role may only be selected by employees of CAFR agencies:</p> <ul style="list-style-type: none"> <li>• Department of Administration</li> <li>• Kansas Department of Transportation</li> <li>• Kansas Public Employees Retirement System</li> <li>• Kansas Lottery</li> </ul>
<p><b>Agency Budget Approver (KGL_AGY_BUDGET_APPROVER)</b></p>	<ul style="list-style-type: none"> <li>• Maintain agency budgets from IBARS</li> <li>• Enter agency budget journals</li> <li>• Approve, post, and delete agency-level budget journals</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>Users with this role should NOT also have the Agency Budget Processor role.</p>



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User Role	Users have the ability to:
<b>Kansas GL Approver – Level 3 (KGL_AGY_GL_APPROVER_L3)</b>	<ul style="list-style-type: none"> <li>• Create, copy, and approve online journals</li> <li>• Define and create standard journals</li> <li>• View standard journals</li> <li>• Import spreadsheet journals</li> <li>• Edit journals</li> <li>• Budget check journals</li> </ul> <p>This user is part of the third pool of agency approvers. This user approves or denies journal vouchers and has final approval authority.</p> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas GL Processor</li> </ul>
<b>Agency ChartField Maintainer (KGL_AGY_CHARTFLD_MAINTAINER)</b>	<ul style="list-style-type: none"> <li>• Update ChartField1 (Agency Use)</li> <li>• Update Class Field (Service Location)</li> <li>• Run ChartField1 (Agency Use) crystal report</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas GL Viewer (KGL_KS_GL_VIEWER)</b>	<ul style="list-style-type: none"> <li>• Run GL reports and inquiries</li> <li>• View Budgets Overview, Activity Log, Ledger Activity Log, and budget check exceptions</li> </ul>
<b>Kansas Reporting Ledger Processor (KGL_KS_RPRTING_LDGR_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Create online journals</li> <li>• Copy journals</li> <li>• Define and create standard journals</li> <li>• View standard journals</li> <li>• Import spreadsheet journals</li> <li>• Edit journals</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of CAFR agencies:</p> <ul style="list-style-type: none"> <li>• Department of Administration</li> <li>• Kansas Department of Transportation</li> <li>• Kansas Public Employees Retirement System</li> <li>• Kansas Lottery</li> </ul>



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User Role	Users have the ability to:
<b>Agency Restricted ChartField Maintainer KDOT &amp; KDHE</b> <b>(KGL_AGY_RESTRICTED_CHRTFLD_MAI)</b>	<ul style="list-style-type: none"> <li>• Create and update ChartField values and status for ChartField 2</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>• Kansas Department of Transportation</li> <li>• Kansas Department of Health and Environment</li> </ul>
<b>Agency Combination Edit Maintainer KDWP</b> <b>(KGL_AGY_COMBO_EDIT_MAINT)</b>	<ul style="list-style-type: none"> <li>• Maintain agency-specific combination edits</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>• Kansas Department of Wildlife, Parks &amp; Tourism</li> </ul>
<b>Agency Tree Manager</b> <b>(KPC_Agy_Tree_Manager)</b>	<ul style="list-style-type: none"> <li>• Create and update trees in Tree Manager – applies to trees in the Project Costing and General Ledger modules in SMART</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Allocations Processor</b> <b>(KGL_AGY_ALLOCATIONS_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Request/run allocation process</li> <li>• Run allocation configuration reports</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by users of the following agencies:</p> <ul style="list-style-type: none"> <li>• Department of Labor</li> <li>• Department on Aging</li> <li>• Kansas Department of Health and Environment</li> </ul>
<b>Agency Chartfield Approver</b> <b>(KGL_AGY_92_CHRTFLD_APPROVER1)</b>	<ul style="list-style-type: none"> <li>• Creates and approves agency requests for new chartfield values</li> </ul>



## 3.5.11 General Ledger – Central Roles (Form Row No. 173)

User Role	Users have the ability to:
<p><b>Central Budget Processor</b> (KGL_CEN_BUDGET_APPROVER)</p>	<ul style="list-style-type: none"> <li>• Enter/update online budget journals</li> <li>• Enter/update online transfer budget journals</li> <li>• Enter spreadsheet budget journals</li> <li>• Import budget journals</li> <li>• Mass delete budget journals</li> <li>• View the following:               <ul style="list-style-type: none"> <li>• Expense Variance</li> <li>• Operating Budget Variance</li> <li>• Gross Margin</li> <li>• Project Revenue Variance</li> <li>• Budget Alert</li> <li>• Expiring Objects</li> <li>• Lapsing of Appropriation</li> <li>• Actuals vs. Budgeted</li> </ul> </li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Central Closing Manager</b> (KGL_CEN_CLOSING_MANAGER)</p>	<ul style="list-style-type: none"> <li>• Create/update budget period sets</li> <li>• Create/update commitment control closing rules</li> <li>• Create, update, and validate commitment control closing sets.</li> <li>• Validate the closing run control</li> <li>• Process the budget close and view calculation log report</li> <li>• View closing status and run Closing Status Report</li> <li>• Undo budget close</li> <li>• Create and update Actuals closing rules</li> <li>• Process fiscal year end close process</li> <li>• Undo fiscal year end close process</li> <li>• Run Closing Trial Balance report</li> <li>• Run consolidations processes</li> <li>• Load reconciliation data and run reconciliation processes</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<p><b>Central GL Auditor</b> (KGL_CEN_GL_AUDITOR)</p>	<ul style="list-style-type: none"> <li>• Post journals</li> <li>• Run monitor background processes (journal unlock)</li> <li>• View journals for coding errors, appropriateness, and policy compliance.</li> <li>• Approve journals</li> </ul> <p>This user is part of a pool of approvers within Accounts &amp; Reports. This user has final approval for all journal vouchers.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Approver</li> </ul>
<p><b>Central Budget Approver</b> (KGL_CEN_BUDGET_APPROVER)</p>	<ul style="list-style-type: none"> <li>• Enter/update online budget journals</li> <li>• Enter/update online transfer budget journals</li> <li>• Enter spreadsheet budget journals</li> <li>• Import budget journals</li> <li>• Mass delete budget journals</li> <li>• View the following:               <ul style="list-style-type: none"> <li>• Expense Variance</li> <li>• Operating Budget Variance</li> <li>• Gross Margin</li> <li>• Project Revenue Variance</li> <li>• Budget Alert</li> <li>• Expiring Objects</li> <li>• Lapsing of Appropriation</li> <li>• Actuals vs. Budgeted</li> </ul> </li> <li>• Post budget journals</li> <li>• Unpost budget journals</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central GL Systems Administrator (KGL_CEN_GL_SYSTEMS_ADMIN)</b>	<ul style="list-style-type: none"> <li>• Create/update accounting entry definitions</li> <li>• Create/update journal generator templates</li> <li>• Create/update entry event journals</li> <li>• Create/update ledger templates</li> <li>• Create/update detail ledgers</li> <li>• Create/update ledger groups</li> <li>• Create/update ledger codes</li> <li>• Import ledger from flat files</li> <li>• Export ledger data</li> <li>• Create/update ledger file formats</li> <li>• Run Template report</li> <li>• Run Detail Ledger and Ledger Codes report</li> <li>• Create/update ledger sets for summary ledgers</li> <li>• Maintain setup tables related to GL and Commitment Control</li> <li>• Define user preferences</li> <li>• Run monitor background processes (journal unlock)</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central GL Maintainer (KGL_CEN_GL_MAINTAINER)</b>	<ul style="list-style-type: none"> <li>• Create/update ledger templates</li> <li>• Create/update detail ledgers and ledger groups</li> <li>• Create/update ledger codes</li> <li>• Import ledger from flat files</li> <li>• Create/update ledger file formats</li> <li>• Create/update ledger sets for summary ledgers</li> <li>• Define, build, and view summary ledgers</li> <li>• Build ledger cubes</li> <li>• Run open period update and open periods mass update</li> <li>• Create budget period calendars, business calendars, and detail calendars</li> <li>• Create schedules</li> <li>• Create summary budget period calendars and summary calendars</li> <li>• Create/update TimeSpans</li> <li>• Create/update currency codes</li> <li>• Access Design ChartFields&gt;Configuration pages (e.g. ChartField Configurator, Attributes)</li> <li>• Run ChartField audits</li> <li>• Create/update account types and SpeedTypes</li> <li>• Set up and validate combination editing</li> <li>• Create/update ChartField Value Sets</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Budget Date Maintainer (KGL_CEN_BUDGET_DATE_MAINTAINER)</b>	<ul style="list-style-type: none"> <li>• Override budget date</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central KK Systems Administrator (KGL_CEN_KK_SYS_ADM)</b>	<ul style="list-style-type: none"> <li>• Create/update Control Budget Definition</li> <li>• Create/update Associated Budgets</li> <li>• Mark journals for override</li> <li>• Maintain setup tables related to GL and Commitment Control</li> <li>• Display Only Access:               <ul style="list-style-type: none"> <li>• Create/Update Journal Entries</li> </ul> </li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central GL Batch Processor</b> <b>(KGL_CEN_BATCH_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>• Run batch processes on ad hoc basis</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Allocations Manager</b> <b>(KGL_CEN_ALLOCATIONS_MANAGER)</b>	<ul style="list-style-type: none"> <li>• Create/update allocation steps</li> <li>• Create/update allocation groups</li> <li>• Rename/copy/delete allocation steps</li> <li>• Request allocations process</li> <li>• Run Allocation Step and Allocation Group reports</li> <li>• Run Allocation Calculation Log report</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Average Daily Balance Manager</b> <b>(KGL_CEN_AVG_DAILY_BAL_MGR)</b>	<ul style="list-style-type: none"> <li>• Post journals</li> <li>• Configure ADB Definition</li> <li>• Process ADB request</li> <li>• Run ADB Definition report and ADB calculation report</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Chartfield Approver</b> <b>(KGL_CEN_92_CHRTFLD_APPROVER1)</b>	<ul style="list-style-type: none"> <li>• Review and approves agency requests for new chartfield values</li> </ul>
<b>Central Journal Workflow Administrator</b> <b>(KGL_CEN_WF92_JRNL)</b>	<ul style="list-style-type: none"> <li>• Re-route journals stuck in workflow</li> </ul> <p>This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team GL analysts</p>
<b>Central Chartfield Request Workflow Administrator</b> <b>(KGL_CEN_WF92_CHRTFLDAPPR)</b>	<ul style="list-style-type: none"> <li>• Re-route chartfield requests stuck in workflow</li> </ul> <p>This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team GL analysts</p>



## 3.5.12 Project Costing – Agency Roles (Form Row No. 185)

User Role	Users have the ability to:
<b>Agency Projects Manager</b> (KPC_Agy_Projects_Manager)	<ul style="list-style-type: none"> <li>• Create projects</li> <li>• Enter, view, and analyze projects</li> </ul> Users with this role must also have the following roles: <ul style="list-style-type: none"> <li>• Kansas Grants Viewer</li> <li>• Kansas Customer Contracts Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Projects/Grants Reporter</b> (KPC_Agy_Proj_Grant_Reporter)	<ul style="list-style-type: none"> <li>• Run reports in Project Costing, Grants Management, and Customer Contracts (PC/GM/CA)</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas Projects Viewer</b> (KPC_KS_Projects_Viewer)	<ul style="list-style-type: none"> <li>• View all projects</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Projects Maintainer</b> (KPC_Agy_Projects_Maintainer)	<ul style="list-style-type: none"> <li>• Maintain configurations to agency-maintained projects tables</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Custom Projects Maintainer</b> (KPC_Agy_Cstm_Proj_Maintainer)	<ul style="list-style-type: none"> <li>• Access and update pages to relate:               <ul style="list-style-type: none"> <li>• Source Type/Category</li> <li>• Category/Subcategory</li> </ul> </li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Tree Manager</b> (KPC_Agy_Tree_Manager)	<ul style="list-style-type: none"> <li>• Create and update trees in Tree Manager – applies to trees in the Project Costing and General Ledger modules in SMART</li> </ul> Users with this role must also have the following role: <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



### 3.5.13 Project Costing – Central Roles (Form Row No. 192)

User Role	Users have the ability to:
<b>Central Projects Processor (KPC_Cen_Projects_Processor)</b>	<ul style="list-style-type: none"> <li>• Create projects in the system for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central PC Batch Processor (KPC_Cen_Batch_Processor)</b>	<ul style="list-style-type: none"> <li>• Has access to run all Grants, Customer Contracts and Project Costing processes.</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Tree Manager (KPC_Cen_Tree_Manager)</b>	<ul style="list-style-type: none"> <li>• Create and update trees in Tree Manager for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Projects Maintainer (KPC_Cen_Projects_Maintainer)</b>	<ul style="list-style-type: none"> <li>• Perform projects configuration for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Central Projects/Grants Reporter (KPC_Cen_Proj_Grant_Reporter)</b>	<ul style="list-style-type: none"> <li>• Run custom and delivered reports in Project Costing, Grants Management, and Customer Contracts (PC/GM/CA) for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>

### 3.5.14 Grants – Agency Roles (Form Row No. 198)

User Role	Users have the ability to:
<b>Agency Grants Manager (KPC_Agy_Grants_Manager)</b>	<ul style="list-style-type: none"> <li>• Create proposals and awards</li> <li>• Create and manage grants</li> <li>• Close grants</li> <li>• Analyzes proposals and awards</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Projects Viewer</li> <li>• Kansas Customer Contracts Viewer</li> <li>• Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
	<p><b>Grants eligible for Workflow</b></p> <ul style="list-style-type: none"> <li>• Selecting Yes allows the user to be placed into Grants Workflow.</li> <li>• Only applicable if your agency is configured for Grants Workflow. Enabling Grants Workflow requires agency wide configuration. To request this configuration for your agency you must submit an agency request form. Grants Workflow will not be active until additional configuration is complete.</li> </ul>
<p><b>Kansas Grants Viewer (KPC_KS_Grants_Viewer)</b></p>	<ul style="list-style-type: none"> <li>• View all grants proposals and grant awards</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency Grants Approver (KPC_Agency_Grants_Approver)</b></p>	<ul style="list-style-type: none"> <li>• Approve proposals</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Kansas Grants Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency Grants Maintainer (KPC_Agy_Grants_Maintainer)</b></p>	<ul style="list-style-type: none"> <li>• Maintain configurations to agency-maintained grants tables</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<p><b>Agency Grants Portal Administrator (KS_AGY_GRANTS_PORTAL_ADMIN)</b></p>	<ul style="list-style-type: none"> <li>• View the Grants Portal pages</li> </ul>

### 3.5.15 Grants – Central Roles (Form Row No. 208)

User Role	Users have the ability to:
<p><b>Central Grants Processor (KPC_Cen_Grants_Processor)</b></p>	<ul style="list-style-type: none"> <li>• Create proposals and awards in the system for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<b>Central Grants Maintainer</b> <b>(KPC_Cen_Grants_Maintainer)</b>	<ul style="list-style-type: none"> <li>Perform grants configuration for all Business Units</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>

### 3.5.16 Contracts Agency Roles (Form Row No. 212)

User Role	Users have the ability to:
<b>Agency Customer Contracts Manager</b> <b>(KPC_Agy_Cust_Contrct_Manager)</b>	<ul style="list-style-type: none"> <li>Create and maintain customer contracts</li> <li>Enter, view, and analyze customer contracts</li> <li>Manage customer contracts, revenue, and billing</li> <li>Process prepaid amounts</li> <li>Work with billing and revenue recognition plans</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>Kansas Grants Viewer</li> <li>Kansas Projects Viewer</li> <li>Kansas GL Viewer</li> </ul>
<b>Agency Customer Contracts Maintainer</b> <b>(KPC_Agy_Cust_Cntrct_Maintainer)</b>	<ul style="list-style-type: none"> <li>Maintain configurations to agency-maintained customer contracts tables</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Kansas Customer Contracts Viewer</b> <b>(KPC_KS_Cust_Contrct_Viewer)</b>	<ul style="list-style-type: none"> <li>View reimbursable customer contracts</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Kansas GL Viewer</li> </ul>
<b>Agency Customer Contracts Separate Billing/Revenue Maintainer</b> <b>(KPC_AGY_CUST_CNTRCT_SEP_BILREV)</b>	<ul style="list-style-type: none"> <li>Mark customer contracts so that billing and revenue can be processed separately, possibly at different times and/or rates</li> </ul> <p>No users should be given this role at this time</p>



## 3.5.17 Contracts Central Roles (Form Row No. 217)

User Role	Users have the ability to:
<b>Central Customer Contracts Processor</b> (KPC_Cen_Cust_Cntrct_Process)	<ul style="list-style-type: none"><li>• Create contracts in the system for all Business Units</li></ul> Users with this role must also have the following role: <ul style="list-style-type: none"><li>• Kansas GL Viewer</li></ul>
<b>Central Customer Contracts Maintainer</b> (KPC_Cen_Cust_Cntrct_Maintainer)	<ul style="list-style-type: none"><li>• Perform contracts configuration for all Business Units</li></ul> Users with this role must also have the following role: <ul style="list-style-type: none"><li>• Kansas GL Viewer</li></ul>
<b>Central Customer Contracts Separate Billing/Revenue Maintainer</b> (KPC_CEN_CUST_CNTRCT_SEP_BILREV)	<ul style="list-style-type: none"><li>• Mark customer contracts so that billing and revenue can be processed separately, possibly at different times and/or rates</li></ul> Users with this role must also have the following: <ul style="list-style-type: none"><li>• Central Customer Contracts Processor</li></ul>



### 3.5.18 Purchasing – Agency Roles (Form Row No. 221)

User Role	Users have the ability to:
<p><b>Agency Requester</b> (No technical role name)</p>	<p>This role provides no access to functions in SMART. Employees must have this role to be selected as a Requester on a requisition.</p> <p>Requisitions will be sent back to the Requester if denied by an approver.</p> <p>Users with the role also require these additional settings by the agency listed below:</p>
	<p><b>Department ID, Fund, Budget Unit, Program, Account (ALL 4 REQUIRED)</b></p> <p>Default ChartFields populated on the requisition. One ChartField string per user. The following ChartFields are required:</p> <ul style="list-style-type: none"> <li>• Department ID</li> <li>• Fund</li> <li>• Budget Unit</li> <li>• Program</li> </ul> <p>The following ChartField is optional: Account</p>
	<p><b>Project, Activity, Source Type, Category, Subcategory</b></p> <p>This is an optional ChartField string based on usage of Project Costing module. Default ChartFields populated on the requisitions. These ChartFields are used to capture grant and project transactions. One ChartField string per user.</p>
	<p><b>Service Location, Agency Use</b></p> <p>Optional ChartFields. One ChartField string per user. Default ChartFields populated on the requisition. These ChartFields are used to capture location and fulfill agency-specific reporting requirements.</p>



# SMART Security Handbook



User Role	Users have the ability to:
	<p><b>“Ship to” Location Code (Required)</b></p> <p>Default “Ship To” location code populated on the requisition. Default “Ship To” location is required.</p>
	<p><b>Phone Number (Required)</b></p> <p>The phone number of the Requester/Buyer associated with the user. Default phone number is required.</p>
	<p><b>Fax Number (Required)</b></p> <p>The fax number of the Requester/Buyer associated with the user. Default fax number is required.</p>
	<p><b>Approver’s Name, Approver’s User ID</b> (Cannot be the User (applicant) this request pertains)</p> <p>The name and user ID of the user who will approve the requisitions.</p>



User Role	Users have the ability to:
<p><b>Agency Purchasing Approver (KPO_Agy_Purchasing_Approver)</b></p>	<ul style="list-style-type: none"> <li>• Edit and approve requisitions</li> </ul> <p>If final approver, must have the Kansas Buyer role. Also, if final approver, enter applicant name and user id under approver. <b>(Cannot be Agency Requester)</b></p> <p>Any Requisitioner can select any Requester for their Purchase Requisitions. If a Requisitioner selects a Requester that is set up as their own approver, the requisition will automatically be approved and will require no further review before being sourced to a Purchase Order. Automatic approval is NOT limited to requisitions created by the Requester; consequently, Requester's cannot be their own approvers.</p> <p>If the Requester has someone else that approves their requisitions, then the Requester could be an approver for other Requesters.</p> <p>If the applicant needs the Approver role to approve requisitions in the absence of another Approver, check the box and provide the Name and User ID of the person this applicant will be approving for. <u>The "List the users whose requisitions you will approve:" may <b>ONLY</b> be left blank if this information provided. Note: (Cannot be Agency Requester)</u></p> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>



User Role	Users have the ability to:
<p><b>Kansas Buyer (KPO_KS_Buyer)</b></p>	<ul style="list-style-type: none"> <li>• Update and approve POs from auto-sourced requisitions</li> <li>• View purchase order status and historical data</li> <li>• Create and dispatch Return To Vendors (RTVs: process of recording items sent back to a vendor)</li> </ul> <p>If user also has the final approver role, validates that requisitions contain the necessary elements, such as Contract ID and Vendor ID before the transaction becomes a PO or Bid event.</p> <p>Users with the role also require these additional settings by the agency:</p> <ul style="list-style-type: none"> <li>• “Ship to” Location Code <b>(Required)</b></li> <li>• Phone Number <b>(Required)</b></li> <li>• Fax Number <b>(Required)</b></li> </ul> <p>Users with the role also require these additional settings:</p> <ul style="list-style-type: none"> <li>• Manager's Name <b>(Required)</b></li> <li>• Manager's ID <b>(Required)</b></li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
	<p><b>“Ship to” Location Code (Required)</b></p> <p>Default “Ship To” location code populated on the requisition. Default “Ship To” location is required.</p>
	<p><b>Phone Number (Required)</b></p> <p>The phone number of the Requester/Buyer associated with the user. Default phone number is required.</p>
	<p><b>Fax Number (Required)</b></p> <p>The fax number of the Requester/Buyer associated with the user. Default fax number is required.</p>



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User Role	Users have the ability to:
	<p><b>Manager's Name, Manager's ID (Required)</b></p> <p>The name and user ID of the manager associated with this user.</p> <p>This relationship allows the Manager to view information about all Buyers that report to them such as:</p> <ul style="list-style-type: none"> <li>• PO Contract Spend</li> <li>• PO Spend by PO Date</li> <li>• Spend by Category</li> <li>• Spend by Vendor</li> <li>• Total Schedule Spend</li> </ul> <p>Additionally, this relationship configures which Buyer's transactional information the Manager can view on their PO dashboard.</p> <p>List the Buyers within your agency that are authorized to (enter "yes" if applicable) Update or Cancel or Close POs in your (applicant) absence</p>
<p><b>Agency Requisitioner (KPO_Agy_Requisitioner)</b></p>	<ul style="list-style-type: none"> <li>• Create, edit, and manage requisitions</li> <li>• Use item selection methods and special requests</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul> <p><b>Default Buyer's Name, Default Buyer's User ID (BOTH Required)</b></p> <p>The name and user ID of the default buyer populated on the requisition.</p>
<p><b>Agency Buying Administrator (KPO_Agy_Buying_Administrator)</b></p>	<ul style="list-style-type: none"> <li>• Close agency POs</li> <li>• View purchase order status and historical data</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Kansas Ad-Hoc Requester</b> <b>(KPO_KS_Ad_Hoc_Requestor)</b>	<ul style="list-style-type: none"> <li>• Send requisitions to Ad-Hoc Approvers in workflow including Central Office of Procurement and Contracts Approvers</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul> <p><b>AND</b> one of the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Requisitioner</li> <li>• Agency Purchasing Approver</li> <li>• Kansas Ad Hoc Approver</li> </ul>
<b>Agency Receiver</b> <b>(KPO_Agy_Receiver)</b>	<ul style="list-style-type: none"> <li>• Create and adjust the status of receipts</li> <li>• Create and dispatch Return To Vendors (RTVs: process of recording items sent back to a vendor)</li> <li>• Enter comments, activities, asset tags and asset ID's on receipts</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas Ad-Hoc Approver</b> <b>(KPO_KS_Ad_Hoc_Approver)</b>	<ul style="list-style-type: none"> <li>• Approve requisitions from Ad-Hoc workflow</li> </ul> <p>This user approves or denies requisitions that were routed to them for Ad-Hoc approval. This user does not have permission to edit the requisition.</p> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Contract Processor</b> <b>(KPO_Agy_Contract_Processor)</b>	<ul style="list-style-type: none"> <li>• Enters transactional contract data</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Agency Requisition Administrator</b> <b>(KPO_Agy_Req_Administrator)</b>	<ul style="list-style-type: none"> <li>• Manage and close agency requisitions</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Kansas Super Buyer KDOT</b> <b>(KPO_KS_Super_Buyer)</b>	<ul style="list-style-type: none"> <li>• Create and edit POs</li> <li>• View purchase order status and historical data</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas Buyer</li> <li>• Kansas GL Viewer</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>• Kansas Department of Transportation</li> </ul>
<b>Kansas RFX Processor KDOT</b> <b>(KPO_KS_RFX_Processor)</b>	<ul style="list-style-type: none"> <li>• Create, award, and update bid events (bidding and negotiation process)</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas Super Buyer KDOT</li> <li>• Kansas GL Viewer</li> <li>• Central Contract Processor</li> </ul> <p>This role may only be selected by employees of the following agencies:</p> <ul style="list-style-type: none"> <li>• Kansas Department of Transportation</li> </ul>
<b>Agency Purchasing Viewer</b> <b>(KPO_Agy_Purchasing_Viewer)</b>	<ul style="list-style-type: none"> <li>• View requisitions, purchase orders, contracts, receipts, and RTVs</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> </ul>
<b>Agency P-Card Holder</b> <b>(KPO_Agy_P-Card_Holder)</b>	<p>This role by itself provides no access to functions in SMART.</p> <p>Any changes to your agency's P-Cards must also be processed through the Office of Procurement and Contracts.</p> <ul style="list-style-type: none"> <li>• Allows the P-Card to be used on requisitions and purchase orders</li> <li>• May reconcile transactions if user has another role that provides access to SMART</li> </ul>



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User Role	Users have the ability to:
<b>Agency P-Card Approver (KPO_Agy_P-Card_Approver)</b>	<ul style="list-style-type: none"> <li>• Approve the P-Card transactions in SMART</li> </ul> <p>Any changes to your agency's P-Cards must also be processed through the Office of Procurement and Contracts.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas AP Viewer</li> <li>• Agency Purchasing Viewer</li> </ul> <p>User with this role cannot have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency P-Card Reconciler</li> <li>• Agency P-Card Reconciler/Approver</li> </ul>
<b>Agency P-Card Reconciler (KPO_Agy_P-Card_Reconciler)</b>	<ul style="list-style-type: none"> <li>• Reconcile the P-Card transactions in SMART</li> </ul> <p>Any changes to your agency's P-Cards must also be processed through the Office of Procurement and Contracts.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas AP Viewer</li> <li>• Agency Purchasing Viewer</li> </ul> <p>User with this role cannot have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency P-Card Approver</li> <li>• Agency P-Card Reconciler/Approver</li> </ul>
<b>Agency P-Card Reconciler/Approver (KPO_AGY_P-CARD_RECON_APPROVER)</b> <b>*Cannot also have P-Card Reconciler or Approver role</b>	<ul style="list-style-type: none"> <li>• Reconcile and approve the transactions for the P-Card</li> </ul> <p>Any changes to your agency's P-Cards must also be processed through the Office of Procurement and Contracts.</p> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas AP Viewer</li> <li>• Agency Purchasing Viewer</li> </ul> <p>User with this role cannot have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency P-Card Approver</li> <li>• Agency P-Card Reconciler</li> </ul>



User Role	Users have the ability to:
<b>Agency P-Card Admin</b> <b>(KPO_AGY_P-CARD_ADMIN)</b>	<ul style="list-style-type: none"> <li>• Perform administrative duties associated with P-Cards in SMART</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas AP Viewer</li> <li>• Agency Purchasing Viewer</li> </ul>

### 3.5.19 Purchasing – Central Roles (Form Row No. 285)

User Role	Users have the ability to:
<b>Central RFX Clerical</b> <b>(KPO_Cen_RFX_Clerical)</b>	<ul style="list-style-type: none"> <li>• Enter bid responses and register and maintain bidders</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central Items Administrator</b> <b>(KPO_Cen_Items_Administrator)</b>	<ul style="list-style-type: none"> <li>• Add/update Item Master</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas Super Buyer</b> <b>(KPO_KS_Super_Buyer)</b>	<ul style="list-style-type: none"> <li>• Create and edit POs</li> <li>• View purchase order status and historical data</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas Buyer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central P-Card Administrator</b> <b>(KPO_Cen_P-Card_Admin)</b>	<ul style="list-style-type: none"> <li>• Add and update Card Holder profile</li> <li>• Assign Card Holder proxies</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>• Kansas GL Viewer</li> <li>• Kansas AP Viewer</li> <li>• Agency Purchasing Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central Purchasing Administrator (KPO_Cen_Purchasing_Admin)</b>	<ul style="list-style-type: none"> <li>• Maintain setup tables related to Purchasing, excluding the Items Table Master</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Kansas RFX Processor (KPO_KS_RFX_Processor)</b>	<ul style="list-style-type: none"> <li>• Create, award, and update bid events (bidding and negotiation process)</li> </ul> <p>Users with this role must also have the following roles:</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas Super Buyer</li> <li>• Kansas GL Viewer</li> <li>• Central Contract Processor</li> </ul>
<b>Central Purchasing Approver (KPO_Cen_Purch_Approver)</b>	<ul style="list-style-type: none"> <li>• Approve requisitions to route to Office of Procurement and Contracts Buyer</li> </ul> <p>This is a pool of approvers that will route requisitions via ad hoc approval to the correct Office of Procurement and Contracts Buyer.</p> <p>Users with this role will also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central Contract Administrator (KPO_Cen_Contract_Admin)</b>	<ul style="list-style-type: none"> <li>• Maintain Supplier Contract configuration</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>
<b>Central Contract Processor (KPO_Cen_Contract_Processor)</b>	<ul style="list-style-type: none"> <li>• Enters transactional contract data</li> <li>• Create contract documents</li> <li>• Sets up collaboration</li> <li>• Performs contract maintenance</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>• Agency Purchasing Viewer</li> <li>• Kansas GL Viewer</li> </ul>



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User Role	Users have the ability to:
<b>Central Contract Viewer</b> <b>(KPO_Cen_SCM_Viewer)</b>	<ul style="list-style-type: none"> <li>Views supplier contract information</li> </ul> <p>Users with this role must also have the following role:</p> <ul style="list-style-type: none"> <li>Central AP Approver - Delegated Audit</li> </ul>
<b>Central Division of Budget Approver</b> <b>(KPO_Cen_DivOfBudget_Approver)</b>	<ul style="list-style-type: none"> <li>Approve requisitions within commodity workflow</li> </ul> <p>This is a pool of approvers that will approve or deny vehicle purchases.</p> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>Agency Purchasing Viewer</li> <li>Kansas GL Viewer</li> </ul>
<b>Central PO Batch Processor</b> <b>(KPO_CEN_BATCH_PROCESSOR)</b>	<ul style="list-style-type: none"> <li>Run batch processes on ad hoc basis</li> </ul> <p>Users with this role must also have the following role.</p> <ul style="list-style-type: none"> <li>Agency Purchasing Viewer</li> <li>Kansas GL Viewer</li> </ul>
<b>Central Requisition Workflow Administrator</b> <b>(KPO_CEN_WF92_REQ)</b>	<ul style="list-style-type: none"> <li>Re-route requisitions stuck in workflow</li> </ul> <p>This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team PO analysts</p>
<b>Central Event Workflow Administrator</b> <b>(KPO_CEN_WF92_BID)</b>	<ul style="list-style-type: none"> <li>Re-route Strategic Sourcing events stuck in workflow</li> </ul> <p>This role should only be assigned to SMART Security Team members and SMART Processing and Systems Team PO analysts</p>
<b>Central PO Service Desk</b> <b>(KPO_Service_Desk)</b>	<ul style="list-style-type: none"> <li>Change Budget Date values</li> <li>Close requisitions</li> <li>Close/re-open purchase orders</li> <li>Review purchasing and related voucher information</li> </ul>
<b>Event Bidder</b> <b>(KPO_92_Event_Bidder)</b>	<ul style="list-style-type: none"> <li>Participate in bid events</li> <li>Review event award information</li> </ul> <p>This role is for bidders who have not previously done business with State of Kansas</p>



User Role	Users have the ability to:
<b>Event Supplier (KPO_92_Event_Supplier)</b>	<ul style="list-style-type: none"> <li>• Participate in bid events</li> <li>• Review event award information</li> </ul> <p>This role is for suppliers who have done business with State of Kansas</p>
<b>Event Guest (KPO_92_Event_Guest)</b>	<ul style="list-style-type: none"> <li>• Default role for Guest users who have not yet registered as bidders</li> </ul>

### 3.5.20 eSupplier Roles (Form Row No. 297)

User Role	Users have the ability to:
<b>External Supplier User</b>	<ul style="list-style-type: none"> <li>• View supplier purchase order, payment, receipt and invoice information</li> </ul> <p>This role should only be assigned to external suppliers and will not appear on the Security Access Form</p>
<b>External Supplier Administrator</b>	<ul style="list-style-type: none"> <li>• Maintain supplier contact information</li> <li>• Maintain supplier category codes</li> <li>• Add new External Supplier Users</li> </ul> <p>This role should only be assigned to external suppliers and will not appear on the Security Access Form</p>
<b>Internal Supplier Administrator</b>	<ul style="list-style-type: none"> <li>• Maintain supplier information</li> <li>• Create and maintain supplier access</li> </ul> <p>This role should only be assigned to Central Vendor Maintenance Team members and SMART Processing and Systems Team PO analysts</p>

### 3.5.21 Security Liaison Roles (Form Row No. 301)

User Role	Users have the ability to:
<b>Agency Security Contact</b>	<ul style="list-style-type: none"> <li>• Run custom KS_SEC_ROLE_BY_USERID query that provides a list of all agency SMART users and their current security roles</li> </ul>