

STATEWIDE MANAGEMENT, ACCOUNTING AND REPORTING TOOL

Training Guide – Travel & Expenses Workflow Maintenance Supervisor Setup

State of Kansas

Travel & Expenses – Workflow Maintenance Supervisor Setup Training Guide

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Workflow Maintenance Supervisor Setup

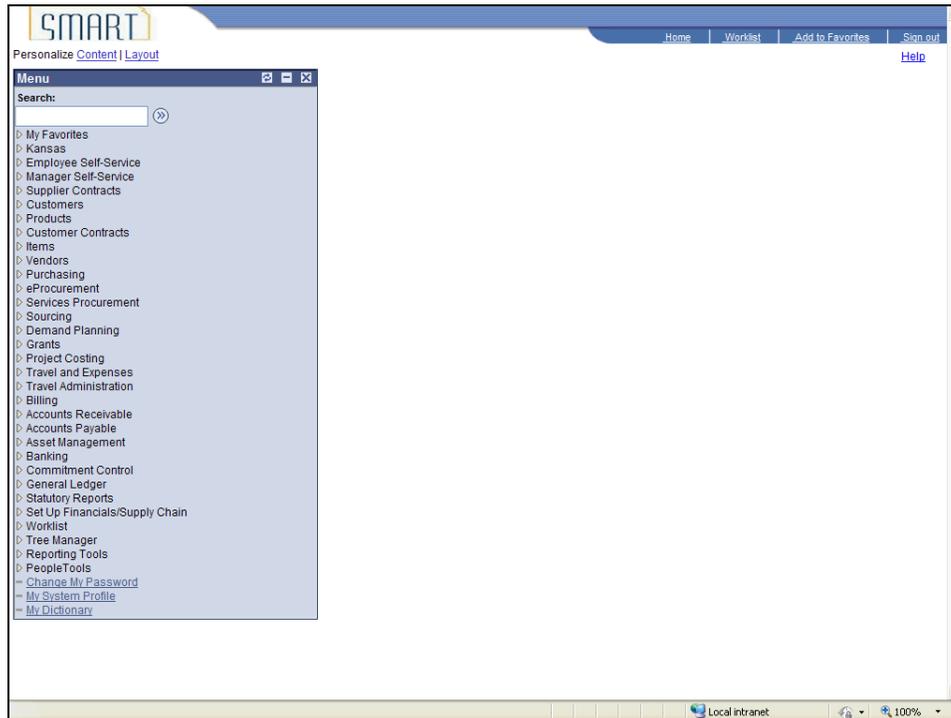
Procedure

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

Step	Action
1.	<p>The TE Maintainer will set up a new supervisor for an employee if either:</p> <ul style="list-style-type: none">• The supervisor noted in SMART is not the person who approves Travel & Expenses transactions for the employee, or• SMART has no information in the supervisor fields for the employee. (In the instance no supervisor shows in SHaRP, none will show in SMART, either.)
2.	<p>Before beginning the process of updating an employee's supervisor, you must know both:</p> <ul style="list-style-type: none">• The employee's State of Kansas ID Number, and• The State of Kansas ID Number for the supervisor to whom the employee's Travel & Expenses approvals will be routed. <p>Once you have all the information you need, you will go to the Travel & Expenses module.</p>

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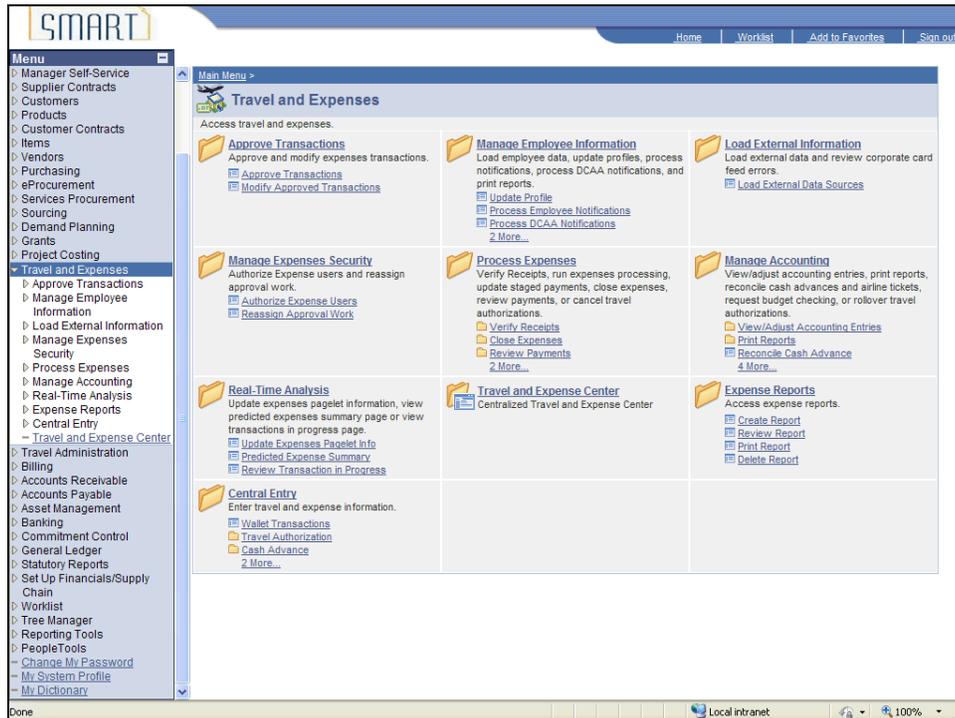
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Step	Action
3.	From the home page, click on the Travel and Expenses link in the Menu. Click the Travel and Expenses link. Travel and Expenses

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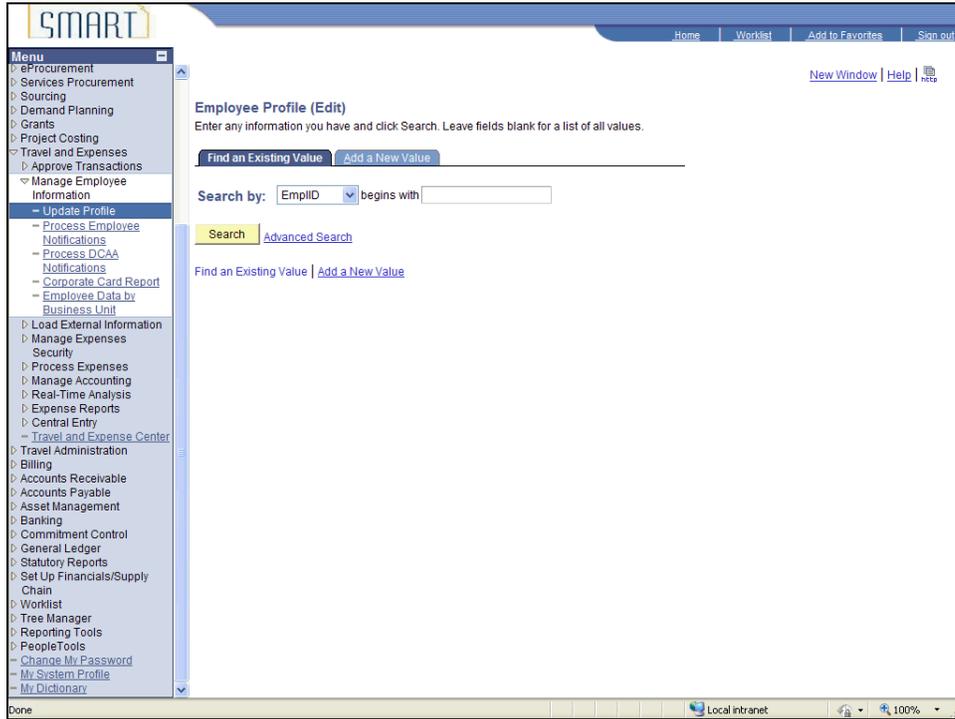
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Step	Action
4.	<p>SMART opens the Travel and Expenses menu.</p> <p>Click the Manage Employee Information link.</p> <p><u>Manage Employee Information</u></p>
5.	<p>SMART opens the Manage Employee Information menu.</p> <p>Click the Update Profile link.</p> <p><u>Update Profile</u></p>
6.	<p>SMART opens the Employee Profile (Edit) page. Be certain the "Find an Existing Value" tab is highlighted.</p>

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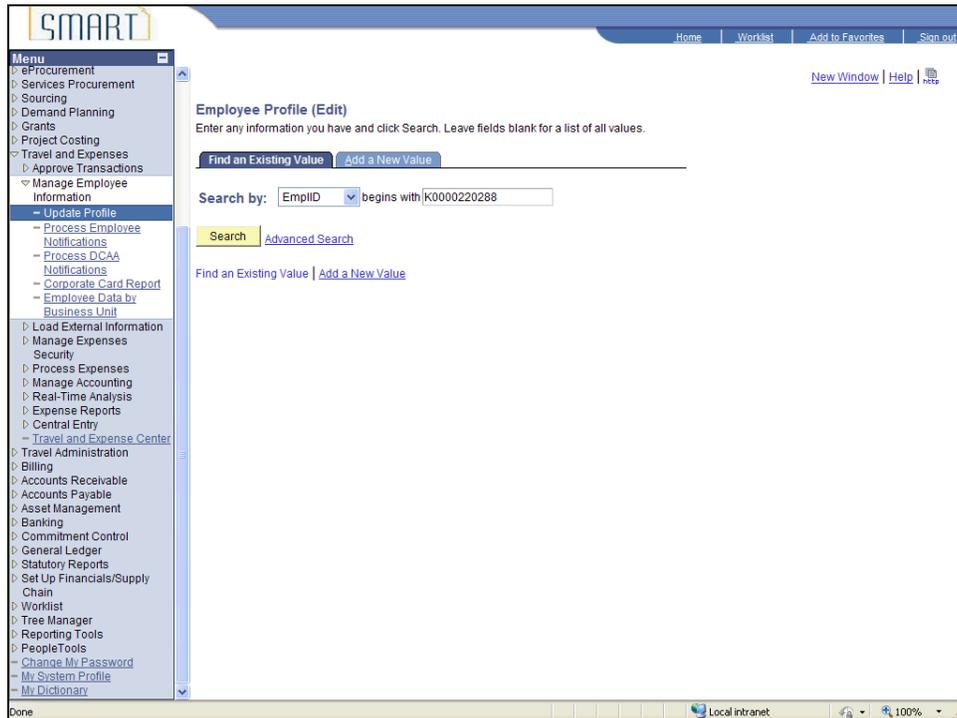
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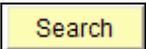


Step	Action
7.	<p>The State of Kansas Employee ID Number for the person whose profile you are updating goes in the "begins with" field.</p> <p>Click in the begins with field.</p> <div data-bbox="305 1234 586 1276" style="border: 1px solid black; width: 173px; height: 20px; margin-left: 10px;"></div>
8.	<p>Enter the desired information into the begins with field. For this simulation, enter "K0000220288".</p>

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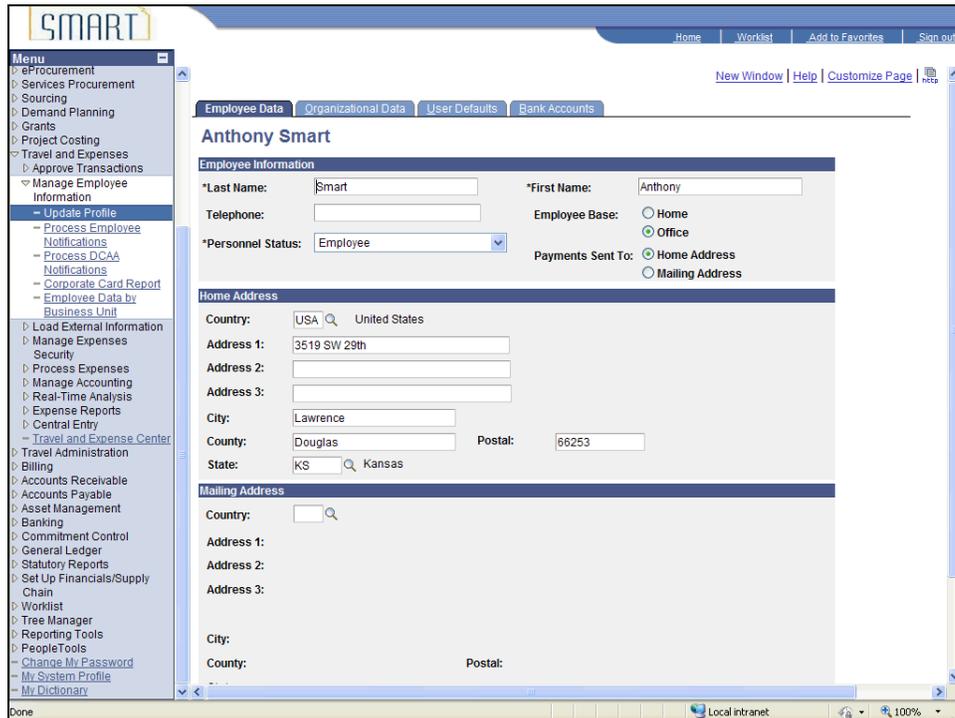
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Step	Action
9.	Click the Search button. 

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Step	Action
10.	<p>SMART opens the employee profile to the Employee Data Tab. There are a series of tabs across the top of the page. To change the supervisor's information, you will go to the Organizational Data Tab.</p> <p>Click the Organizational Data tab.</p> <p>Organizational Data</p>

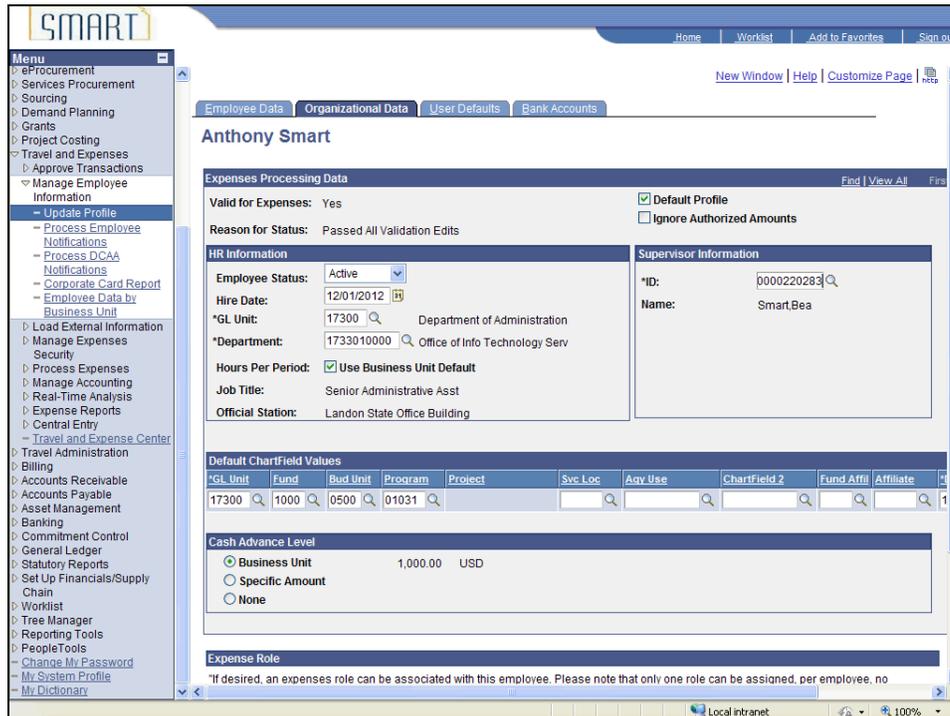
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Step	Action
11.	<p>You will update the employee's supervisor in the "Supervisor Information" box. Most often, this box will be pre-populated by information from SHARP. Changes occurring in SHARP often cause this information to also change in SMART. Manually entering the supervisor's Employee ID number here, though, will leave the information here until it is changed again from this page, even if the employee's supervisor changes in SHARP.</p> <p>Click in the Supervisor Information *ID field.</p> <p><input type="text" value="K000022028"/></p>
12.	<p>Type the State of Kansas Employee ID Number for the person serving as the employee's supervisor.</p> <p>Enter the desired information into the ID field. For this simulation, enter "K0000220283".</p>

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Step	Action
13.	To enter the supervisor ID you just typed, you must save this information to SMART. Click the Right scrollbar.

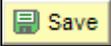
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The screenshot displays the SMART system's 'Update Profile' interface. On the left is a navigation menu with categories like Procurement, Grants, and Travel and Expenses. The main area shows the following details:

- Valid for Expenses:** Yes
- Reason for Status:** Passed All Validation Edits
- HR Information:** Employee Status (Active), Hire Date (12/01/2012), *GL Unit (17300), *Department (1733010000), Hours Per Period (Use Business Unit Default), Job Title (Senior Administrative Asst), Official Station (Landon State Office Building).
- Supervisor Information:** *ID (K00002202E), Name (Smart.Sam).
- Default ChartField Values:** A table with columns for *GL Unit, Fund, Bud Unit, Program, Project, Svc Loc, Acq Use, ChartField.2, Fund Affil, and Affiliate.
- Cash Advance Level:** Radio buttons for Business Unit (selected), Specific Amount, and None.
- Expense Role:** A dropdown menu set to 'Employee'.

At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify', along with a breadcrumb trail: 'Employee Data | Organizational Data | User Defaults | Bank Accounts'.

Step	Action
14.	Click the Save button. 
15.	IMPORTANT: As a rule of thumb, a supervisor entered into SMART following this process will stay in SMART until updated again. However, it is highly recommended to check the employee's profile to make certain the supervisor setting is correct before creating an expense report.
16.	FANTASTIC! You have now completed the process for updating a supervisor in SMART. End of Procedure.