Training Guide – Travel & Expenses Reassigning Approvals

State of Kansas

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Travel & Expenses

Reassigning Approvals

Procedure

SMART allows Travel and Expenses approvers or administrators to reassign transactions to be approved between the queues of various approvers. This might be done when an approver is on leave and has no defined alternate approver, for example, or when a report routed incorrectly, or even if the approver wants another manager to review and approve the traveler's request. This action prevents the item from remaining indefinitely in a person's work list without being approved.

Step	Action
1.	Keep in mind when considering reassigning work to another approver: • The transaction must either be pending or held in the approver's queue. • The person reassigning the approval delegates his or her ability to review and approve or disapprove the request to the new reviewer. • The person who receives the transaction must have approval roles for approving it; otherwise, it will be assigned instead to the SMART team as an error. • If the transaction is reassigned to an approver who has already approved it, SMART will automatically approve it. • If the person receiving the transaction is already one of the regular approvers, that person will receive it only once.
2.	Before beginning the reassignment process, be certain you know this information: • The User IDs (not the Employee IDs) of both the person from whose queue the transactions will be reassigned, and the person to whom the transactions will be reassigned. • Confirm that the person to whom the transaction will be assigned has the needed permissions; otherwise the transactions will error out of the agency's queue and go to the SMART team for research.
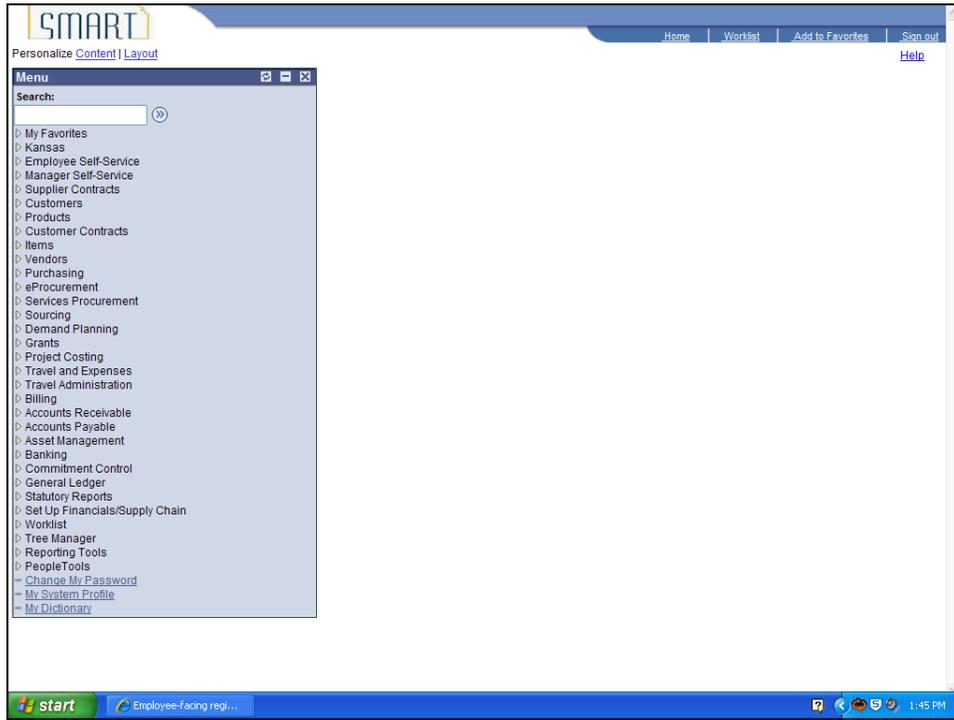
Step	Action
3.	Start from the SMART home page. Click the **Travel and Expenses** link. Travel and Expenses
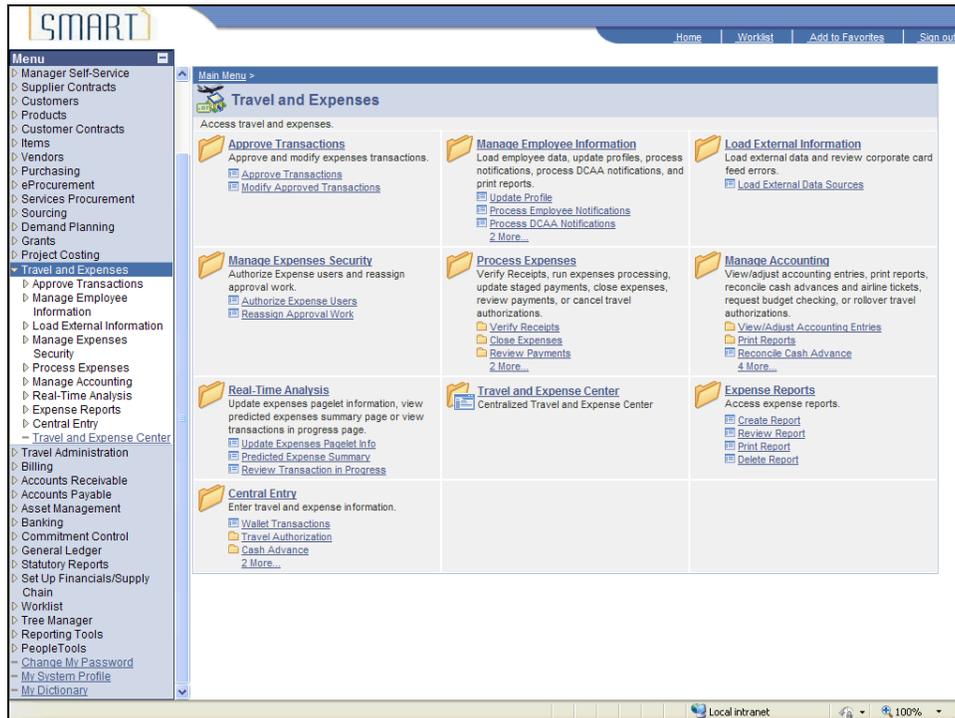
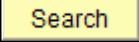| Step	Action
4.	SMART opens the **Travel and Expenses** menu. Click the **Manage Expenses Security** link. Manage Expenses Security
5.	SMART opens the **Manage Expenses Security** menu. Click the **Reassign Approval Work** link. Reassign Approval Work

Step	Action
6.	Enter the desired information into the **begins with** field. For this simulation, enter "**DA00SXS**".
7.	Click the **Search** button.
8.	SMART opens the **Reassign Work** page. Here, you will identify the transactions that will be reassigned as well as the person to whom they will be reassigned to. Start by identifying the person to whom the transactions will be reassigned. You will need to enter that person's User ID into the **Reassign Work To** field.
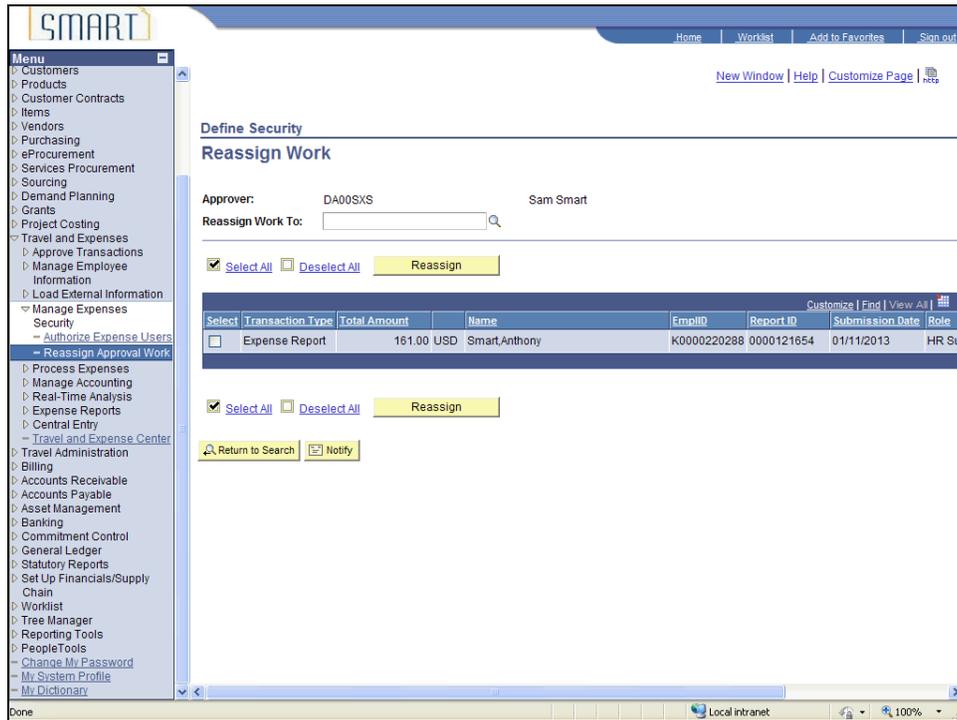
Step	Action
9.	Enter the desired information into the **Reassign Work To** field. For this simulation, enter "**DA00JXD**".
10.	For each transaction to be reassigned, you must check the "Select" box to the left of the transactions. In this case, there is only one travel authorization to be reassigned. Click the **Select** checkbox.
11.	Select the "Reassign" button to transfer the transactions to the new reviewer's queue. Click the **Reassign** button. Reassign
12.	**AWESOME!** SMART removes the transaction from the current approver's queue, and reassigns it to the queue of the person you designated. You have just reassigned a transaction to another person. **End of Procedure.**