

Training Guide – Travel & Expenses Reassigning Approvals

State of Kansas

Table of Contents

Travel & Expenses	1
Reassigning Approvals	.1

Travel & Expenses – Reassigning Approvals Training Guide

Statewide Management, Accounting and Reporting Tool

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.

ersonalize Content Layout		
Menu 🛛 🗖 🗮 🗶		
Search		
Concern.		
(W)		
My Favorites		
Kansas		
Employee Self-Service		
Manager Self-Service		
> Supplier Contracts		
Customers		
Products		
Customer Contracts		
Vendere		
Purchaging		
Procurament		
Services Procurement		
Sourcing		
Demand Planning		
Grants		
Project Costing		
Travel and Expenses		
Travel Administration		
Billing		
Accounts Receivable		
Accounts Payable		
Asset Management		
Banking		
Commitment Control		
General Ledger		
> Statutory Reports		
> Set Up Financials/Supply Chain		
Worklist		
ree Manager		
Reporting Loois		
People Loois		
Mis Quarterer Das Fila		
My System Prome		
- HIV LUCTODOD		

Step	Action
3.	Start from the SMART home page. Click the Travel and Expenses link. Travel and Expenses

Travel & Expenses – Reassigning Approvals Training Guide

Statewide Management, Accounting and Reporting Tool



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

CUUDT								
SIIIHKL			Home	Worklist	Add	o Favori	es <u>s</u>	iqn out
Menu =								
D Customers	^				New	Windo	v Help J	
▷ Products								ccp
D Customer Contracts		Peassign Work						
D liems								
Vehicles		Enter any information you have and click Search. Leave fields blank for a list of all values.						
Procurement								
Services Procurement		Find an Existing Value						
Sourcing								
▷ Demand Planning		Search by: User ID v begins with						
▷ Grants								
Project Costing		Case Sensitive						
Travel and Expenses								
D Approve Transactions		Search Advanced Search						
Manage Employee								
Information								
Manage Expenses								
 Manage Expenses Security 								
- Authorize Expense Lisers								
= Reassign Approval Work								
N Process Expenses	<u>`</u>							
D Manage Accounting								
Real-Time Analysis								
Expense Reports								
Central Entry								
- Travel and Expense Center	<u>r</u> []							
Travel Administration								
▷ Billing								
Accounts Receivable								
Accounts Fayable								
b Banking								
Danking Commitment Control								
General Ledger								
Statutory Reports								
Set Up Financials/Supply								
Chain								
▷ Worklist								
Iree Manager								
D Reporting Tools								
- Change My Password								
- My System Profile								
- My Dictionary	~							
Dana			6	and internet		0.	A 10001	-
vone			LC	ical intrañet		P.0. T	~ 100%	

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.

COODT	
SILIHEL	Home Worklist Add to Eavorites Sinn out
Menu	
D Products	New Window Help Customize Page 👯
Customer Contracts	
▷ Items	
Vendors	Define Security
▷ Purchasing	
▷ eProcurement R	Reassign work
Services Procurement	
Demand Planning	
D Grants	pprover: DA005XS Sam Smart
▷ Project Costing Red	teassign Work To:
D Approve Transactions	
D Manage Employee	Select All Deselect All Reassign
Information	
D Load External Information	Customize Find View All
 Manage Expenses Security 	Select Transaction Type Total Amount Name EmpliD Report ID Submission Date Role
- Authorize Expense Users	
- Reassign Approval Work	Expense Report 161.00 OSD Smart, Antrony R0000220288 0000121654 01/11/2013 PR Su
▷ Process Expenses	
Manage Accounting	
▷ Real-Time Analysis	
Expense Reports	Select All Deselect All Reassign
D Central Entry	
Travel and Expense Center	Return to Search
> Billing	
Accounts Receivable	
Accounts Payable	
Asset Management	
D Banking	
D Commitment Control	
D General Ledger	
D Statutory Reports D Set Up Financials/Supply	
Chain	
▷ Worklist	
Tree Manager	
Reporting Tools	
▷ PeopleTools	
- <u>Unange my PassWord</u>	
- My Dictionary	
Dana	
Done	😼 Local intranet 🦷 👻 100% 👻

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.	Click the "Reassign" button to transfer the transactions to the new reviewer's queue.
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.