

Training Guide – Travel & Expenses Setting Up Proxies

State of Kansas

Table of Contents

| Travel & Expenses | 1 |
|--------------------|---|
| Setting Up Proxies | 1 |

Travel & Expenses – Setting Up Proxies Training Guide

Statewide Management, Accounting and Reporting Tool

Travel & Expenses

Setting Up Proxies

Procedure

A "proxy" is a SMART user who is able to enter expense transactions on behalf of an employee. You may need to set up a proxy for an employee when he or she is a new traveler, when that employee's previous proxy leaves the agency, or any time an employee needs to have access allowing him or her to perform actions such as deleting expense reports or cancelling travel authorizations for an employee.

| Step | Action |
|------|--|
| 1. | Before you begin this process, you must know: |
| | The Employee ID number of the person to whom you will add one or more proxies, and |
| | The User ID's of the proxy or proxies you will add. |

| SMART | | lome <u>Worklist</u> | Add to Favorites | Sign ou |
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| Personalize Content Layout | | | | Help |
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| D Vendors | | | | |
| D Purchasing | | | | |
| ▷ eProcurement | | | | |
| Services Procurement | | | | |
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| ▷ Demand Planning | | | | |
| D Grants | | | | |
| Project Costing | | | | |
| Travel and Expenses | | | | |
| D Travel Administration | | | | |
| D Billing | | | | |
| D Accounts Receivable | | | | |
| D Asset Management | | | | |
| D Banking | | | | |
| Commitment Control | | | | |
| General Ledger | | | | |
| Statutory Reports | | | | |
| Set Up Financials/Supply Chain | | | | |
| D Worklist | | | | |
| D Tree Manager | | | | |
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Travel & Expenses – Setting Up Proxies Training Guide

Statewide Management, Accounting and Reporting Tool

| Step | Action |
|------|---|
| 2. | Begin from the SMART home page. |
| | Click the Travel and Expenses link. Travel and Expenses |



| Step | Action |
|------|--|
| 3. | SMART opens the Travel and Expenses menu. |
| | Click the Manage Expenses Security link. |
| | Manage Expenses Security |
| 4. | SMART opens the Manage Expenses Security menu. |
| | Click the Authorize Expense Users link. |
| | Authorize Expense Users |

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| | | <u>Home</u> | <u>Worklist</u> | Add to Favorites Sign out |
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| Customers | | | | and the second s |
| Products | | | | New Window Help Help |
| D Customer Contracts | | | | |
| D Items | Authorize Users | | | |
| Vendors | Enter any information you have and click Search Leave fields blank for a list of all values | | | |
| Purchasing | Enter any mormation you have and click ocardin. Ecore notes shark for a list of all values. | | | |
| ▷ eProcurement | | | | |
| Services Procurement | Find an Existing Value Add a New Value | | | |
| ▷ Sourcing | | | | |
| Demand Planning | Search by: EmpliD v begins with | | | |
| ▷ Grants | Search by. Linking Bogins min | | | |
| ▷ Project Costing | | | | |
| Travel and Expenses | Search Advanced Search | | | |
| Approve Transactions | | | | |
| Manage Employee | | | | |
| Information | Find an Existing Value Add a New Value | | | |
| ▷ Load External Information | | | | |
| | | | | |
| Security | | | | |
| = Authorize Expense Lisers | | | | |
| - Reasonign Approval Work | | | | |
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| - Travel and Expanse Center | | | | |
| Travel Administration | | | | |
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| D Statutory Reports | | | | |
| Statutory Reports | | | | |
| Chain | | | | |
| D Worklist | | | | |
| D Tree Manager | | | | |
| ▷ Reporting Tools | | | | |
| ▷ PeopleTools | | | | |
| - Change My Password | | | | |
| - My System Profile | | | | |
| - My Dictionary | | | | |
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| Step | Action |
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| 5. | SMART opens the Authorize Users page. (Be certain the "Find an Existing Value" tab is highlighted.) |
| | Click in the begins with field. |

Travel & Expenses – Setting Up Proxies Training Guide

Statewide Management, Accounting and Reporting Tool



| Step | Action |
|------|--|
| 6. | Key in the Employee ID number of the person to whose profile you are adding one or more proxies. |
| | Enter the desired information into the begins with field. For this simulation, enter "K0000220283". |
| 7. | Click the Search button. |

| SMART | | Home | Worklist Add to F | avorites Sign out |
|--|--|--------------------|-------------------------|-------------------|
| Menu Customers Products Customer Contracts | | | New Window Help Cus | tomize Page 📑 |
| Items Vendors Purchasing Percurement | uthorize Users am Smart | | | |
| Services Procurement Sourcing Demand Planning | tering new UserIDs on this page will give those users the bense transactions on behalf of the employee. | e ability to enter | | |
| Grants Project Costing Travel and Expenses Approve Transactions | A00MXS Q Smart,Michael | | + - | |
| Manage Employee Information Load External Information | | | | |
| Manage Expenses Security Authorize Expense Users Reassign Approval Work | Save | | | |
| Process Expenses Manage Accounting Real-Time Analysis | | | | |
| Expense Reports Central Entry <u>Travel and Expense Center</u> Travel Administration | Return to Search | | | |
| ▷ Billing ▷ Accounts Receivable ▷ Accounts Payable | | | | |
| Asset Management Banking Commitment Control General Ledger | | | | |
| Statutory Reports Set Up Financials/Supply Chain | | | | |
| ▷ Worklist ▷ Tree Manager ▷ Reporting Tools ▷ PeopleTools | | | | |
| <u>Change My Password</u> <u>My System Profile</u> <u>My Dictionary</u> | | | | |
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| Step | Action |
|------|---|
| 8. | SMART opens the Authorize Users page. Double-check that the page names the right employeein this case, Sam Smart. Michael Smart is currently set up as a proxy. Add Bea Smart as a proxy also. |
| | Begin by adding a row to enter the proxy. |
| | Click the Add a new row button. |

| SMART | | | | 1 | 1 | 1 00 |
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| Menu | ^ | | <u>Home</u> | New Window | Help Customize | Sign ou Page 🛄 |
| Customer Contracts Items Vendors | | Authorize Users | | | | |
| Purchasing Procurement Services Procurement Sourcing | | Safri Strian Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee. | | | | |
| Demand Planning Grants Project Costing Transland Fragments | | Authorized User ID Name DA00MXS Q Smart,Michael | | Ŧ. | | |
| Approve Transactions Manage Employee Information | | Q | | • | | |
| Load External Information Anage Expenses Security Authorize Expense Users | | Save | | | | |
| Reassign Approval Work Process Expenses Manage Accounting Real Time Analysis | | | | | | |
| Central Entry Travel and Expense Center | Ξ | Return to Search | | | | |
| Accounts Receivable Accounts Payable | | | | | | |
| Asset Management Banking Commitment Control General Ledger | | | | | | |
| Statutory Reports Set Up Financials/Supply Chain Worklist | | | | | | |
| Tree Manager Reporting Tools PeopleTools | | | | | | |
| <u>Change My Password</u> <u>My System Profile</u> <u>My Dictionary</u> | ~ | | | | | |

| Step | Action |
|------|--|
| 9. | SMART adds a new row. This is where you will enter the User ID of the proxy. |
| | Click in the Authorized User ID field. |
| 10. | Enter the desired information into the Authorized User ID field. For this simulation, enter "DA00BXS". |
| 11. | SMART will allow the user to enter an Employee ID on the Authorize Users page, but entering an Employee ID will not grant proxy access. Make sure to add User ID's. |
| | Some employee's have multiple User ID's - make sure to select the User ID that has the appropriate security roles attached to it. |
| | For example, if Michael Smart had multiple User ID's (DA00MXS and DA01MXS), the DA01MXS profile may be for entering Petty Cash and Imprest vouchers. Entering DA01MXS on the Authorize Users page would cause workflow to error out since the DA01MXS User ID does not have the T & E Approver security role attached. |
| | IMPORTANT : The User ID entered on the Authorize Users page must be the User ID the Approver logs into the SMART system with to approve T & E transactions. |

| Step | Action |
|------|---|
| 12. | Once you enter this information, save it. |
| | Click the Save button. |

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| Menu 🗖 | |
| D Customers | New Window Help Customize Page |
| D Products | |
| D Customer Contracts | |
| D Items | |
| ▷ vendors | |
| D Purchasing | Save Confirmation |
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| ▷ Grants | * The Save was successful. |
| Project Costing | OK |
| Travel and Expenses | |
| D Approve Transactions | |
| D Manage Employee | |
| Information | Return to Search E Notify |
| D Load External Information | |
| Manage Expenses | |
| Security | |
| Authorize Expense Users | |
| Reassign Approval Work | |
| Process Expenses | |
| D Manage Accounting | |
| Real-Time Analysis | |
| Expense Reports | |
| Central Entry | |
| Travel and Expense Center | |
| D Travel Administration | |
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| Set Up Financials/Supply | |
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| Reporting Tools | |
| PeopleTools | |
| <u>Change My Password</u> | |
| My System Profile | |
| - <u>My Dictionary</u> | |
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| Step | Action |
|------|---|
| 13. | SMART lets you know that it saved the information you entered. Click the OK button. |
| 14. | SMART returns you to the Authorize Users page and displays the new proxy you just entered. If needed, you can repeat the steps of clicking on the "+" button and entering new User ID's for all the proxies you need to enter for the employee. End of Procedure. |