Colorado State University PUEBLO

TEM Profile
-step by step-

- **First step in initiating travel**
  - Arranger and traveler must have their TEM Profile created before any travel documents can be created

- **Located on Main Menu**

  - Lookup and Maintenance

  - Travel => TEM Profile

Lookup and Maintenance

Capital Asset Builder

- Pre-Asset Tagging

Capital Asset Management

- Asset
- Asset Fabrication
- Asset Global (Add)
- Asset Location Global
- Asset Payment
- Asset Retirement Global

Chart of Accounts

- Account
- Account Global
- Account Delegate
- Account Delegate Global
- Account Delegate Model
- Account Delegate Global From Model
- Object Code
- Object Code Global
- Organization
- Project Code
- Sub-Account
- Sub-Object Code
- Sub-Object Code Global

Financial Processing

- Disbursement Voucher Travel Company

Travel

- TEM Profile

Vendor

- Vendor
- Vendor Contracts

TEM Profile
-step by step-

- **TEM Profile for ALL Kuali Users**

- All Kuali users have an option to setup their own TEM Profile

- Once in TEM Profile Lookup screen, click "create my profile" tab in upper right hand corner

  - Before a travel arranger can create TEM Profiles or travel documents for a traveler, they first must create their own TEM Profile.

  - Once your TEM Profile is created you will no longer have the option to "create my profile", but you can search by your first and last name to make any necessary edits to your profile

TEM Profile
-step by step-

- **TEM Profile for ALL Kuali Users**

- **Document Overview Tab**

- Document number and description automatically generated

- Explanation and Org. Doc Number fields appear same as in other Kuali documents

- Description
  - For new TEM Profiles the description automatically populates
  - For edits to TEM Profiles something must be entered by the user or the document will not submit as this isn't auto-populated

TEM Profile
-step by step-

- **TEM Profile for ALL Kuali Users**

- **Edit Tem Profile Tab**

- Document automatically pulls information from Kuali
  - Traveler Type (employee vs non employee)
  - First, Last Name, Middle Initial
  - Employee ID, Dept. Code
  - CSU-Pueblo Address and Contact Info

- Asterisks denote required field entered by user
  - DOB
    - Employee Default to 01/01/1900
    - Student Default to 01/01/1915
  - Citizenship
  - Resident Status, Gender
  - Accounting Chart Code (CO, BG, GC, PB)
  - Must enter in an account number, the account number can be changed at any time in the TA, TR, or the TEM Profile

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- **TEM Profile for ALL Kuali Users**
  - Asterisks denote required field entered by user

- **Emergency Profile Tab**
  - Emergency contact relation and name
    - Must enter phone number even though there is not an asterisk
    - Once entered make sure to click add
    - Emergency Contacts cannot be deleted, but the information can be changed to another individual

- **Payment Method**
  - Automatic – do not update

- **Arrangers Tab**
  - Arranger Principal Name
    - Arranger is able to create travel on behalf of the traveler
    - Initiator can assign arranger by clicking the magnifying glass next to Principal Name
    - To give access to create TA and TR must check the boxes
    - One and only one Arranger must/can be primary
    - Once entered, make sure to click add

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TEM Profile
-step by step-

- Email Notifications
  - Any box that is checked will send the traveler an email based on that information
  - We recommend if traveler does not want this information to not check the boxes as this creates a lot of emails
  - If the traveler has not updated their action list preferences they will automatically receive emails when they have travel documents that need their approval
- Administrator – Credit Card
  - DO NOT FILL OUT THIS SECTION
- Once document is complete hit submit
  - Once submitted, document is final
- If document isn't complete, click save and you can return at any point to document
  - It can be retrieved in your action list

EMPLOYEES:

- All designated Dept. Travel Arrangers can set up TEM Profiles for Dept. travelers

- Recommend dept. has two arrangers for backup purposes

- Once in TEM Profile Lookup screen, click "create new from kim" for current CSU-Pueblo employees
    - If you do not have this option, you are not set up as an arranger
    - To get this access fill out the TEM Arranger Application

NON-EMPLOYEES:

- Dept. travel arrangers fill out the A/R Customer Form so the non-employee can be added to the system to create their profile
    - See slide 11 for guide

EMPLOYEES:

- Once in TEM Profile Lookup screen, click "create new from kim" for current CSU-Pueblo employees
  - If you do not have this option, you are not set up as an arranger for anyone
  - To get this access fill out the TEM Arranger Application

- By clicking "create new from KIM" it takes you to the "TEM Profile from KIM Person Lookup" screen shown on the next slide
  - KIM-Kuali Identity Management

EMPLOYEES:

- Search for an employee using the numerous criteria shown to the right

- Create New Profile under Actions means the TEM Profile has not been created and you have access to create it

- Edit Profile under actions means the TEM Profile has been created, and you have access to edit it at any point

- If under actions is blank, it means you do not have access to the traveler

  - To get this access fill out the TEM Arranger Application

- By clicking "create new profile" you will follow the process on pages 3-6

EMPLOYEES:

- By clicking "edit" on the previous slide it takes you to the screen on the right

- The left side of the document is the old information, and the right side is the new information you are entering

  - The old information is populated on the new side, but the editable fields can be changed
  - Once the document is saved or submitted yellow asterisks will be displayed next to the information that was updated

TEM Profile: Non CSU-Pueblo Employee
-step by step-

NON-EMPLOYEE

- Create New From Customer
  - Non-Employee (Including Students)
- Non-Employee **must** be set up as existing customer in Kuali
  - To set up you must fill out the [A/R Customer Form](#)
- When form is complete, the department contact on the form will receive email saying it has been created
- When you receive the email, in TEM Profile Lookup, click "create new from customer"

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TEM Profile

-step by step-

- Choose create new profile for non-employees with no existing profile
- Follow the same Process as New Profile (pages 3-6)
- If they already exists, select edit profile for non-employees with existing profile

* required field

	Customer Number:	
	Customer Name:	*RECRUIT*
	Customer Phone Number:	
	Customer Tax Number:	
	Customer Tax Number Type Code:	○ FEIN ○ SSN ● NONE
	Active:	● Yes ○ No ○ Both
	Address Name:	
	Street Address Line1:	
	Street Address Line2:	
	City Name:	
	State:	[▼]
	Zip Code:	
	International Province:	
	Customer Email Address:	

All Searchable Fields

[search] [clear]

11 items retrieved, displaying all items.

Actions	Customer Number	Customer Type Code	Customer Name	Customer Phone Number	Customer Tax Number	Customer Tax Number Type Code	Active	Address Name	Street Address Line1	Street Address Line2	City Name	State	Zip Code	International Province	Customer Email Address
create new profile	WOM2079	11	WOMENS SOCCER RECRUIT		*********		Yes	WOMENS SOCCER RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
create new profile	MEN2081	11	MENS GOLF RECRUIT		*********		Yes	MENS GOLF RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
edit profile	SOF2086	11	SOFTBALL RECRUIT		*********		Yes	SOFTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
edit profile	FOO2077	11	FOOTBALL RECRUIT		*********		Yes	FOOTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU

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