

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

[Provide Feedback](#)


KFS 5.3.1 Standalone (Oracle9i)

Logged in User: gpolzer@colostate.edu Impersonating User: sleaming@colostate.edu

* required field

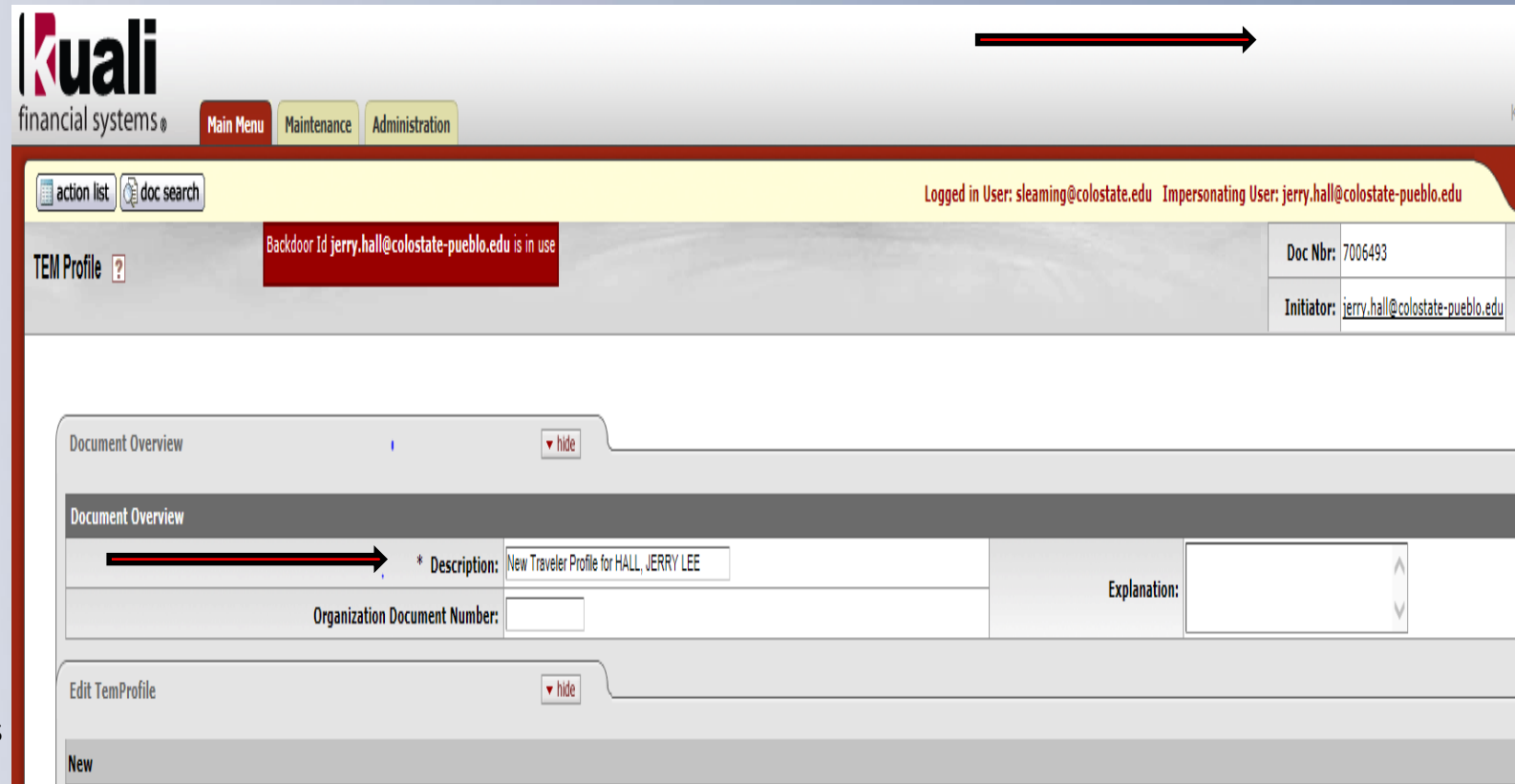
KIM Principal Name:	<input type="text"/>	<input type="button" value="🔍"/>
AR Customer Id:	<input type="text"/>	<input type="button" value="🔍"/>
First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Traveler Type Code:	<input type="text"/>	<input type="button" value="▼"/>
Primary Department Code:	<input type="text"/>	
Chart Code:	<input type="text"/>	<input type="button" value="▼"/> <input type="button" value="🔍"/>
Account Number:	<input type="text"/>	<input type="button" value="🔍"/>
Return Only my Travelers?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both	
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>		

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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



The screenshot shows the Kuali financial systems interface. At the top left is the Kuali logo and 'financial systems' text. Navigation tabs include 'Main Menu', 'Maintenance', and 'Administration'. A yellow banner at the top right shows 'Logged in User: sleaming@colostate.edu' and 'Impersonating User: jerry.hall@colostate-pueblo.edu'. A red warning box states 'Backdoor Id jerry.hall@colostate-pueblo.edu is in use'. The 'TEM Profile' tab is active, displaying a 'Document Overview' section with a 'Description' field containing 'New Traveler Profile for HALL, JERRY LEE'. Below this are fields for 'Organization Document Number' and 'Explanation'. A 'hide' button is visible next to the 'Document Overview' section. Below the overview is an 'Edit TemProfile' section with a 'New' button.





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

Edit TemProfile hide

New

TEM Profile

Traveler Type Code:	Employee
Last Update:	
Updated By:	
First Name:	JERRY
Middle Name:	LEE
Last Name:	HALL
Employee ID:	PID075868
Primary Department Code:	PB-P314
Driver's License Number:	
Driver's License State:	<input type="text"/>
Driver's License Expiration Date:	<input type="text"/>
Motor Vehicle Record Check:	<input type="checkbox"/>
* Date Of Birth:	<input type="text"/>
* Citizenship:	<input type="text"/>
* Non Resident Alien:	<input type="radio"/> Yes <input type="radio"/> No
* Gender:	<input type="radio"/> Male <input type="radio"/> Female

Default Accounting

* Chart Code:	PB - CSU Pueblo <input type="text"/>
Account Number:	<input type="text"/>
Sub-Account Number:	<input type="text"/>
Project Code:	<input type="text"/>

Address

Street Address Line1:	2200 BONFORTE BLVD
Street Address Line2:	
City Name:	PUEBLO
State:	CO
Zip Code:	81001
Country:	United States

Contact Info

Phone Number:	719-549-2149
Email:	JERRY.HALL@CSUPUEBLO.EDU

Emergency Contacts hide

New Emergency Contacts

* Contact Relation Type Code:	<input type="text"/>
* Contact Name:	<input type="text"/>
Contact Phone Number:	<input type="text"/>
Email Address:	<input type="text"/>



- **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

Emergency Contacts ▼ hide

New Emergency Contacts

* Contact Relation Type Code:

* Contact Name:

Contact Phone Number:

Email Address:

▼ hide Emergency Contacts (John Doe)

* Contact Relation Type Code: Spouse

* Contact Name: John Doe

Contact Phone Number: 719-555-5555

Email Address:

Payment Method ▼ hide

New

ACH Sign Up:

ACH Transaction Type:

Arrangers ▼ hide

New Arranger Information

* Principal Name:

Allow to initiate TA document:

Allow to initiate TR/RELO/ENT document:

Primary:

Active:

▼ hide Arranger Information (leanne.martinez@colostate-pueblo.edu)

* Principal Name: leanne.martinez@colostate-pueblo.edu

Allow to initiate TA document:

Allow to initiate TR/RELO/ENT document:

Primary:

Active:

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

▼ hide

Email Notification Preferences

New	Travel Authorization (TA) FINAL: <input type="checkbox"/>
	Travel Authorization (TA) Status Change: <input type="checkbox"/>
	Travel Expense Report (TR, ENT, RELO) FINAL: <input type="checkbox"/>
	Travel Expense Report (TR, ENT, RELO) Status Change: <input type="checkbox"/>

▼ hide

Administrator

New Corporate Credit Card and External Agency Accounts

* Credit Card Or Agency Name:	<input type="text"/>
* Account Number:	<input type="text"/>
Expiration Date:	<input type="text"/>
Effective Date:	<input type="text"/>
Note:	<div style="border: 1px solid #ccc; height: 40px;"></div>
* Active:	<input checked="" type="checkbox"/>

Profile Status

KIM Principal Id:	44050
AR Customer Id:	<input type="text"/>
* Active:	<input checked="" type="checkbox"/>

Notes and Attachments (0) ▶ show

Ad Hoc Recipients ▶ show

Route Log ▶ show

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

[Provide Feedback](#)

KFS 5.3.1 Standalone (Oracle9i)


Logged in User: gpolzer@colostate.edu Impersonating User: jriba@colostate.edu Login Logout

create new from kim create new from customer

* required field

KIM Principal Name:	<input type="text"/>
AR Customer Id:	<input type="text"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Traveler Type Code:	<input type="text" value="v"/>
Primary Department Code:	<input type="text"/>
Chart Code:	<input type="text" value="v"/> <input type="text" value="q"/>
Account Number:	<input type="text"/>
Return Only my Travelers?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both

search clear cancel



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


KFS 5.3.1 Standalone (Oracle9i)

Logged in User: gpolzer@colostate.edu Impersonating User: jriba@colostate.edu

* required field

KIM Principal Name:	<input type="text"/>	<input type="button" value="🔍"/>
AR Customer Id:	<input type="text"/>	<input type="button" value="🔍"/>
First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Traveler Type Code:	<input type="text"/>	<input type="button" value="▼"/>
Primary Department Code:	<input type="text"/>	
Chart Code:	<input type="text"/>	<input type="button" value="▼"/> <input type="button" value="🔍"/>
Account Number:	<input type="text"/>	<input type="button" value="🔍"/>
Return Only my Travelers?:	<input type="radio"/> Yes	<input type="radio"/> No <input checked="" type="radio"/> Both
Active:	<input checked="" type="radio"/> Yes	<input type="radio"/> No <input type="radio"/> Both

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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

All Searchable Fields

Principal Name:	<input type="text"/>
Principal Id:	200*
Employee Id:	<input type="text"/>
Entity Id:	<input type="text"/>
First Name:	<input type="text"/>
Middle Name:	<input type="text"/>
Last Name:	hall
Email Address:	<input type="text"/>
Phone Number:	<input type="text"/>
Employee Status Code:	<input type="text"/>
Employee Type Code:	<input type="text"/>
Primary Department Code:	<input type="text"/>
Campus Code:	<input type="text"/>
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
<input type="button" value="search"/> <input type="button" value="clear"/>	

3 items retrieved, displaying all items.

Actions	Principal Name	Principal Id	Employee Id	Entity Id	First Name	Middle Name	Last Name	Email Address	Phone Number
create new profile	cindy.hall@colostate-pueblo.edu	2001650	PID075804	44812	CINDY	K	HALL	cindy.hall@csupueblo.edu	719-549-2147
create new profile	jerry.hall@colostate-pueblo.edu	2001651	PID075868	44813	JERRY	LEE	HALL	jerry.hall@csupueblo.edu	719-549-2149
create new profile	justin.hall@colostate-pueblo.edu	2001652	PID061686	44814	JUSTIN	RICHARD	HALL	justin.hall@csupueblo.edu	719-549-2100

Export options: [CSV](#) | [spreadsheet](#) | [XML](#)





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

Document Overview

Document Overview

* Description:

Organization Document Number:

Explanation:

Edit TemProfile hide

Old	New
TEM Profile	TEM Profile
Traveler Type Code: Employee	Traveler Type Code: Employee
Last Update: 01/19/2016	Last Update: 01/19/2016
Updated By: epillsbu@colostate.edu	Updated By: epillsbu@colostate.edu
First Name: JOHN	First Name: JOHN
Middle Name: DEREK	Middle Name: DEREK
Last Name: LOPEZ	Last Name: LOPEZ
Employee ID: PID081021	Employee ID: PID081021
Primary Department Code: PB-P506	Primary Department Code: PB-P506
Driver's License Number:	Driver's License Number: <input type="text"/>
Driver's License State:	Driver's License State: <input type="text"/>
Driver's License Expiration Date:	Driver's License Expiration Date: <input type="text"/>
Motor Vehicle Record Check: No	Motor Vehicle Record Check: <input type="checkbox"/>
Date Of Birth: 01/01/1900	* Date Of Birth: 01/01/1900
Citizenship: United States	* Citizenship: United States
Non Resident Alien: No	* Non Resident Alien: <input type="radio"/> Yes <input checked="" type="radio"/> No
Gender: Male	* Gender: <input checked="" type="radio"/> Male <input type="radio"/> Female
Default Accounting	Default Accounting
Chart Code: PB - CSU Pueblo	* Chart Code: PB - CSU Pueblo
Account Number: 1310498	Account Number: 1310498
Sub-Account Number:	Sub-Account Number: <input type="text"/>
Project Code:	Project Code: <input type="text"/>
Address	Address
Street Address Line1: 2200 BONFORTE BLVD	Street Address Line1: 2200 BONFORTE BLVD
Street Address Line2:	Street Address Line2:
City Name: PUEBLO	City Name: PUEBLO
State: CO	State: CO
Zip Code: 81001	Zip Code: 81001
Country: United States	Country: United States
Contact Info	Contact Info
Phone Number: 719-549-2535	Phone Number: 719-549-2535
Email: DEREK.LOPEZ@CSUPUEBLO.EDU	Email: DEREK.LOPEZ@CSUPUEBLO.EDU
Emergency Contacts	Emergency Contacts
New Emergency Contacts	* Contact Relation Type Code: <input type="text"/>

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 Kualu
 - 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”

KFS 5.3.1 Standalone (Oracle9i)

Logged in User: gpolzer@colostate.edu Impersonating User: jriba@colostate.edu Login Logout

* required field

KIM Principal Name:	<input type="text"/>	<input type="button" value="🔍"/>
AR Customer Id:	<input type="text"/>	<input type="button" value="🔍"/>
First Name:	<input type="text"/>	
Last Name:	<input type="text"/>	
Traveler Type Code:	<input type="text"/>	<input type="button" value="v"/>
Primary Department Code:	<input type="text"/>	
Chart Code:	<input type="text"/>	<input type="button" value="v"/> <input type="button" value="🔍"/>
Account Number:	<input type="text"/>	<input type="button" value="🔍"/>
Return Only my Travelers?:	<input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Both	
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	
<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>		

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

All
Searchable
Fields

Customer Number:	<input type="text"/>
Customer Name:	<input type="text" value="RECRUIT"/>
Customer Phone Number:	<input type="text"/>
Customer Tax Number:	<input type="text"/>
Customer Tax Number Type Code:	<input type="radio"/> FEIN <input type="radio"/> SSN <input checked="" type="radio"/> NONE
Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Address Name:	<input type="text"/>
Street Address Line1:	<input type="text"/>
Street Address Line2:	<input type="text"/>
City Name:	<input type="text"/>
State:	<input type="text" value="v"/>
Zip Code:	<input type="text"/>
International Province:	<input type="text"/>
Customer Email Address:	<input type="text"/>

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	WM2079	11	WOMENS SOCCER RECRUIT		*****		Yes	WOMENS SOCCER RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
create new profile	MM2081	11	MENS GOLF RECRUIT		*****		Yes	MENS GOLF RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
edit profile	SM2086	11	SOFTBALL RECRUIT		*****		Yes	SOFTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU
edit profile	FO02077	11	FOOTBALL RECRUIT		*****		Yes	FOOTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523-0120		BRANDON.BAILEY@COLOSTATE.EDU