

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
- <u>Sub-Account</u>
- <u>Sub-Object Code</u>
- Sub-Object Code Global

Financial Processing

- Disbursement Voucher Travel Company
- Travel
- <u>TEM Profile</u>
- Vendor
- <u>Vendor</u>
- Vendor Contracts





- 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

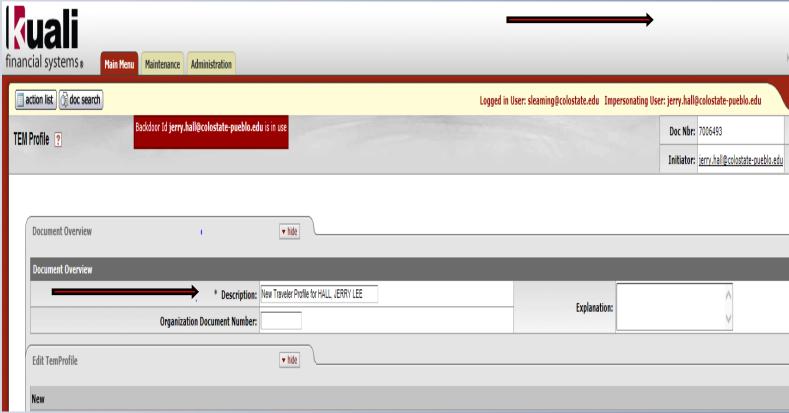
	Provide Feedback
	KFS 5.3.1 Standalone (Oracle9i)
	Logged in User: gpolzer@colostate.edu Impersonating User: sleaming@colostate.edu
	* required field
KIM Principal Name:	©
AR Customer Id:	
First Name:	
Last Name:	
Traveler Type Code:	V
Primary Department Code:	
Chart Code:	
Account Number:	
Return Only my Travelers?:	Ves No 🖲 Both
Active:	Yes ○ No ○ Both
search cle	ar cancel

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- 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 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:	v
	Driver's License Expiration Date:	
	Motor Vehicle Record Check:	
	* Date Of Birth:	
	* Citizenship:	×
	* Non Resident Alien:	○ Yes ○ No
	* Gender:	🔿 Male 🔿 Female
Default Accounting		
	* Chart Code:	PB - CSU Pueblo 🔽 🔍
	Account Number:	<u> </u>
	Sub-Account Number:	
	Project Code:	
Address		
	Street Address Line1:	2200 BONFORTE BLVD
	Street Address Line2:	
	City Name:	PUEBLO
	State:	co
	Zip Code:	
	Country:	United States
Contact Info		
	Phone Number:	719-549-2149
	Email:	JERRY.HALL@CSUPUEBLO.EDU
Emergency Contacts	▼ hide	
New Emergency Contacts	to the sector of	
	* Contact Relation Type Code: * Contact Name:	
	Contact Phone Number:	
	Email Address:	



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	L	
New Emergency Contacts		
	* Contact Relation Type Code:	✓
	* Contact Name:	
	Contact Phone Number:	
	Email Address:	
	а	dd
▼ hide Emergency Contacts (John Doe)		
	* Contact Relation Type Code:	Spouse 🗸
	* Contact Name:	John Doe
	Contact Phone Number:	719-555-5555
	Email Address:	
	de	lete
Payment Method v hide	(
New		
	ACH Sign Up:	
	ACH Transaction Type:	
Arrangers vide		
-		
New Arranger Information		
	* Principal Name:	8
	Allow to initiate TA document:	
	Allow to initiate TR/RELO/ENT document:	
	Primary:	
	Active:	<u>v</u>
	а	dd
▼ hide Arranger Information (leeanne.martinez@colostate-pueblo.edu)		
	* Principal Name:	leeanne.martinez@colostate-pueblo.edu 🛇
	Allow to initiate TA document:	
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	Primary:	
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		lete

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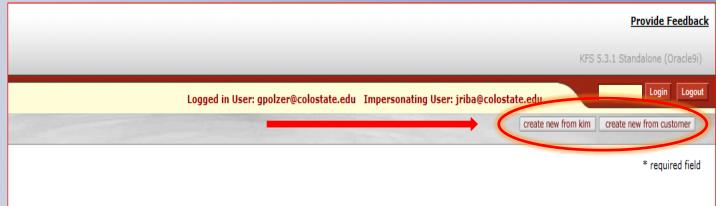


- Email Notifications
 - Any box that is checked will send the traveler an email based on that information
 - We recommend if traveler does not want this information to not check the boxes as this creates a lot of emails
 - If the traveler has not updated their action list preferences they will automatically 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

Email Notification Preferences	▼ hide
New	
	Travel Authorization (TA) FINAL:
	Travel Authorization (TA) Status Change:
	Travel Expense Report (TR, ENT, RELO) FINAL:
	Travel Expense Report (TR, ENT, RELO) Status Change:
Administrator	▼ hide
New Corporate Credit Card and External Agency Accounts	* Credit Card Or Agency Name:
	* Account Number:
	Expiration Date:
	Effective Date:
	Note:
	Ψ
	* Active: 🔽
	add
Profile Status	
	KIM Principal Id: 44050 AR Customer Id:
	* Active:
Notes and Attachments (0)	• show
Ad Hoc Recipients	▶ show
Route Log	▶ show







- 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 <u>TEM Arranger Application</u>

NON-EMPLOYEES:

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

KIM Principal Name:	۹
AR Customer Id:	
First Name:	
Last Name:	
Traveler Type Code:	
Primary Department Code:	
Chart Code:	
Account Number:	<u>()</u>
Return Only my Travelers?:	O Yes O No 🖲 Both
Active:	
search cle	ar cancel





- 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 <u>TEM Arranger Application</u>
- 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

KIM Principal Name:	
AR Customer Id:	<u> </u>
First Name:	
Last Name:	
Traveler Type Code:	
Primary Department Code:	
Chart Code:	
Account Number:	
Return Only my Travelers?:	◯ Yes ◯ No ◉ Both
Active:	
search cle	ar cancel

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- 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 <u>TEM Arranger Application</u>
- By clicking "create new profile" you will follow the process on pages 3-6

Rain Menu Maintenance Administration		
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	Principal Id:	200*
	Employee Id:	
All	Entity Id:	
All	First Name:	
Searchable —	Middle Name: Last Name:	hall
	Email Address:	
Fields	Phone Number:	
	Employee Status Code:	
	Employee Type Code:	
	Primary Department Code:	
	Campus Code:	
	Active:	● Yes ○ No ○ Both
	search	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
ſ	create new profile	cindy.hall@colostate-pueblo.edu	2001650	PID075804	44812	CINDY	к	HALL	cindy.hall@csupueblo.edu	719-549-2147
l	create new profile	jerry.hall@colostate-pueblo.edu	2001651	PID075868	44813	JERRY	LEE	HALL	jerry.hall@csupueblo.edu	719-549-2149
1	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





- 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

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Country: United States Country: United States Contact Info Contact Info Phone Number: 719-549-2535 Email: DEREK.LOPEZ@CSUPUEBLO.EDU	State:	CO				State: C	0	
Contact Info Contact Info Phone Number: 719-549-2535 Email: DEREK.LOPEZ@CSUPUEBLO.EDU	Zip Code:	81001				Zip Code: 8	1001	
Phone Number: 719-549-2535 Phone Number: 719-549-2535 Email: DEREK.LOPEZ@CSUPUEBLO.EDU Email: DEREK.LOPEZ@CSUPUEBLO.EDU	Country:	United States				Country: U	nited States	
Email: DEREK.LOPEZ@CSUPUEBLO.EDU Email: DEREK.LOPEZ@CSUPUEBLO.EDU	Contact Info		(Contact Info				
	Phone Number:	719-549-2535			Phon	ne Number: 7	19-549-2535	
Emergency Contacts	Email:	DEREK.LOPEZ@CSUPUEBLO.EDU				Email: D	EREK.LOPEZ@CSUPUEBLO.EDU	
	Emergency Contacts	▼ hide						_
New Emergency Contacts	New Emergency Contacts							
* Contact Relation Type Code:		*	Contact Relation Type Code:	V				



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 <u>A/R Customer</u> <u>Form</u>
- 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 5.5.1 Standalone (Oraclesi)
	Logged in User: gpolzer@colostate.edu	Impersonating User: jriba@colostate.edu	Login Logout
		create n	ew from kice create new from customer
			* required field
KIM Principal Name:	<u> </u>		
AR Customer Id:	<u> </u>		
First Name:			
Last Name:			
Traveler Type Code:	V		
Primary Department Code:			
Chart Code:	✓ (9)		
Account Number:	9		
Return Only my Travelers?:	O Yes O No 🖲 Both		
Active:	● Yes ○ No ○ Both		
search cle	ear cancel		

Collection (or all of the collection)



- Choose create new profile for nonemployees 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

	Customer Number:				
	Customer Name:				
	Customer Phone Number:				
	Customer Tax Number:				
	Customer Tax Number Type Code:	○ FEIN ○ SSN			
All	Active:	● Yes ○ No ○ Both			
Searchable —	Address Name:				
	Street Address Line1:				
Fields	Street Address Line2:				
	City Name:				
	State:				
	Zip Code:				
	International Province:				
	Customer Email Address:				
search clear					

* required field

11 items retrieved, displaying all items.

Tem Profile From Customer Lookup 🔋

Actions	<u>Customer</u> <u>Number</u>	Customer Type Code	<u>Customer Name</u>	<u>Customer Phone</u> <u>Number</u>	<u>Customer Tax</u> <u>Number</u>	<u>Customer Tax Number</u> <u>Type Code</u>	<u>Active</u>	Address Name	Street Address Line1	<u>Street Address</u> <u>Line2</u>	<u>City Name</u>	<u>State</u>	<u>Zip Code</u>	International Province	<u>Customer Email Address</u>
<u>create new</u> profile	V OM2079	11	WOMENS SOCCER RECRUIT		********		Yes	WOMENS SOCCER RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523- 0120		BRANDON.BAILEY@COLOSTATE.EDU
<u>create new</u> profile	M N2081	11	MENS GOLF RECRUIT		********		Yes	MENS GOLF RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523- 0120		BRANDON.BAILEY@COLOSTATE.EDU
<u>edit profile</u>	S0F2086	11	SOFTBALL RECRUIT		********		Yes	SOFTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523- 0120		BRANDON.BAILEY@COLOSTATE.EDU
edit profile	F002077	11	FOOTBALL RECRUIT		******		Yes	FOOTBALL RECRUIT	0120 CAMPUS DELIVERY		CSU CAMPUS	CO	80523- 0120		BRANDON.BAILEY@COLOSTATE.EDU