

# Kuali TEM Module

- Part 1: Introduction to TEM



# Overview

- TEM Introduction
- TEM Travel Documents
- Route Log (Approval Process)
- Travel Examples
  - TEM Profile
  - Travel Reimbursement (TR)



## TEM Definition

Travel

Entertainment

Moving

\*\*\*Focus currently is on the Travel portion of the module



# Benefits of the TEM Module

## Electronic Workflow

- Reduces amount of paper consumed
- Eliminates need for physical signatures
- Documents can be approved from any where with an internet connection
- Enables individuals to better track travel documents (route log)
- No paperwork lost in transit



# Benefits of the TEM Module

## Financially Integrated

- Capability to enter account information and object codes directly into Kuali
- Ability to have accounts encumber future travel expenses
- Currency conversion helps with International travel currency calculations
- Assigns accounts to travel documents by information retained in the traveler's TEM Profile



## TEM Travel Documents

- **TEM Profile**
- **Travel Arranger**
- **Travel Authorization (TA)**
- **Travel Reimbursement (TR)**



## Traveler Profile in the Quali TEM Module

- A TEM Profile will need to be completed for every traveler prior to travel documents being created
  - Once created it does not have to be created again
- Collects needed information about the traveler (name, emergency contact, default account information, etc.)
- Travel Arrangers (individuals who prepare travel documents for a traveler) can be added to a traveler's TEM profile
- Traveler's profile information will pull automatically into travel documents
- Once submitted the TEM Profile document is final



# TEM Profile

## Traveler Profile in the Kualu TEM Module

- Current Process has the Traveler Information section on the TRAF. This information is entered every time the TRAF is completed.
- New Process only requires TEM Profile to be created once, and is pulled into travel documents via the Traveler lookup

Traveler:
Title:
Department/program:



# TEM Profile

- TEM Profiles can be created one of 3 ways
  - Traveler may create their own profile: “Create My Profile”
    - Once traveler’s profile is created this will no longer appear
  - Travel Arranger may create profile for employees: “Create New from KIM”
    - Travel Arranger has to have access to the traveler’s department or traveler to have this option
  - Travel Arranger may create profile for non-employees: “Create New From Customer”



# TEM Profile

TEM Profile Lookup 

[create my profile](#) [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"/> 
Primary Department Code:	<input type="text"/>
Chart Code:	<input type="text"/>  
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](#)



# TEM Arranger

To have the ability to create travel documents for all travelers within one or more departments:

- Complete the TEM Arranger Application form located at <http://www.csupueblo.edu/Purchasing/TravelInformation/Pages/default.aspx>
  - Send completed forms to Sarah Lowell
  - After form processes you will have access to travel for non-employees
  - Please note that if an employee assignment ends with a department, TEM access will no longer be available to employee.

BUSINESS AND FINANCIAL SERVICES  
TEM Arranger Application



TEM APPLICATION FOR: NEW ACCESS  ADDITIONAL ACCESS  DELETE ACCESS

USER NAME (Last, First, Middle)		PID #:	E-ACCOUNT:	TODAY'S DATE
DEPT. NO.	DEPT. NAME		E-MAIL ADDRESS	
CAMPUS MAIL ADDRESS			PHONE NUMBER	

**TEM Arranger Access Requested for:**

Examples: Dept Nbr/Unit: P300 Dept Nbr/Unit: P045

Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:
Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:
Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:
Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:
Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:
Dept Nbr/Unit:	Dept Nbr/Unit:	Dept Nbr/Unit:

I understand that the data contained in KFS is confidential. The access I am requesting is for my use in performing my job duties & responsibilities. I agree that my username & password will not be shared and I am responsible for any accesses logged against my username. In using my username & password, I will follow the policies & procedures of the University. I will not use another person's username and password. If I terminate employment with the University or my department, I will notify Business and Financial Services. Upon completion of the form, send to : Accounts Payable Room #211, Administration Building.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

Print or Type Name of Director or Dept. Head \_\_\_\_\_

Director or Dept. Head \_\_\_\_\_ Date \_\_\_\_\_

Print or Type Name of Dean or VP Authority \_\_\_\_\_

Dean or VP Authority Signature \_\_\_\_\_ Date \_\_\_\_\_

# TEM Arranger

## Travel Arranger

- Benefits of Travel Arranger:
  - Allows Travel Arrangers to process travel across departments
  - Allows department personnel to process travel when designated travel arrangers are out of the office
  - One Travel Arranger can save a travel document, and another travel arranger can open it and complete the document
- A Travel Arranger may be added to a TEM profile one of 2 ways:
  - **TEM profile create/edit:** this is the most efficient method for updating a profile, and is final once submitted.
  - **Travel Arranger document:** this method requires a routing (approval) process that requires approval from traveler, thus is slower. Only use Travel Arranger documents when you do not have access to create/edit a TEM profile.



# TEM Profile and Travel Arranger Examples

- **You have been asked to set up your TEM profile. Try completing this within the training environment.**
  - Use the step by step guides provided to complete this (p.1-6)
  
- **You have been asked to set up a TEM profile for a traveler in your department. Try completing this within the training environment.**
  - Use the step by step guides provided to complete this (p.7-10)



# Routing: TEM Profile vs. Travel Arranger Documents

## TEM Profile Document

- TEM Profile create/edits will finalize automatically in the system. No need to wait! If you set up a profile for a traveler, they will receive an FYI in their Action List stating their travel profile has been set up

## Travel Arranger Document

- Travel Arranger documents will route to a traveler for approval. Document is final after approved by traveler. When the document is final the individual requesting travel arranger access will have access to the traveler's TEM profile.



## TEM Profile

TEM Profile	
Traveler Type Code:	Employee
Last Update:	02/05/2016
Updated By:	epillsbu@colostate.edu
First Name:	ERIN
Middle Name:	PILLSBURY
Last Name:	MERCURIO
Employee ID:	827873264
Primary Department Code:	CO-6003
Driver's License Number:	
Driver's License State:	
Driver's License Expiration Date:	
Motor Vehicle Record Check:	No
Date Of Birth:	01/01/1900
Citizenship:	United States
Non Resident Alien:	No
Gender:	Female
Default Accounting	
Chart Code:	CO - Colorado State University
Account Number:	1356620
Sub-Account Number:	
Project Code:	
Address	
Street Address Line1:	6003 CAMPUS DELIVERY
Street Address Line2:	
City Name:	FORT COLLINS
State:	CO
Zip Code:	80523
International Postal Code:	
Country:	United States
Contact Info	
Phone Number:	970-491-6752
Email:	ERIN.MERCURIO@COLOSTATE.EDU

## Travel Arranger Document

Document Overview	
* Description:	<input type="text"/>
Organization Document Number:	<input type="text"/>
Explanation: <input type="text"/>	
Traveler Section	
Traveler	
Traveler Lookup: <input type="text"/>	
Edit Request	
Edit Request	
Notification to resign from arranger:	<input type="checkbox"/>
Request to become an arranger:	Please delegate authority to initiate the travel authorization for your trip. <input type="checkbox"/>
	Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip. <input type="checkbox"/>
	Primary Arranger <input type="checkbox"/>
Ad Hoc Recipients	
Ad Hoc Recipients <input type="button" value="show"/>	
Route Log	
Route Log <input type="button" value="show"/>	

# Travel Authorization (TA)

- Travel Authorization (TA) documents are completed prior to a trip taking place. TA documents include the name of traveler, estimated travel dates and estimated costs.
  - Current Process: The TRAF is completed
- Travel Authorization documents are required for:
  - In State Travel that includes Ghost Card purchases
  - Out of State Travel
  - International Travel
  - All Travel Advances
  - All No Cost trips (note you cannot submit a \$0.00 trip, you will need to recognize a Travel Authorization for \$0.01)
- Travel Authorization documents are NOT required for:
  - General In State Travel (cannot include Ghost Card Purchases or Travel Advances)



# Travel Reimbursement (TR)

## Travel Reimbursement (TR)

- Travel Reimbursement (TR) documents are completed after a trip has taken place and receipts have been received.
  - Current Process: Travel Reimbursement Sheet is completed
  
- The TR document can be created by:
  - Pulling a Finalized Travel Authorization (TA) in Quali and creating a “new reimbursement” off of that TA document
  - By clicking on the Travel Reimbursement (TR) document in the system. This can only be done for general In State Travel (cannot include Ghost Card Purchases or Travel Advances)



## Let's practice preparing an In State Travel Reimbursement

### – Complete TR Example #1 of Example Handout

- In-State travel does not require a Travel Authorization (TA) unless there is Ghostcard airfare or a travel advance
- **Do not submit the document yet!** Lets “save” the document and look at the route log



# Did you look at the route log?

## TR Document for In-State Travel w/ no airfare or advance

- Travel Arranger prepares document and the general system routing includes:
  - Routes to traveler for approval
  - Routes to Fiscal Officer for approval
  - Routes to Travel Department for processing (the Travel Department it routes to automatically is Fort Collins)
  
- Ad hoc Groups
  - TRAV-Pxxx will need to be ad hoc in the ad hoc group section for department approval
  - Pueblo Travel will need to be ad hoc in the ad hoc group section for department approval

Ad Hoc Recipients ▼ hide

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Ad Hoc Recipients

Person Requests:

* Action Requested	* Person	Actions
APPROVE ▼	<input type="text"/> 🔍	<input type="button" value="add"/>

Ad Hoc Group Requests:

* Action Requested	* Namespace Code	* Name	Actions
APPROVE ▼	<input type="text"/>	<input type="text"/> 🔍	<input type="button" value="add"/>
APPROVE ▼	KFS-TEM	TRAV-P300 🔍	<input type="button" value="delete"/>
APPROVE ▼	KR-WKFLW	Pueblo Travel 🔍	<input type="button" value="delete"/>

## TRAV-Pxxx Approvers

### TRAV-Pxxx: Departmental travel approver

- TRAV-Pxxx will need to approve the travel document
  - Pxxx is the department the traveler resides in
  - i.e. if the traveler is in the purchasing department it is TRAV-P304
  
- To add an TRAV-Pxxx approval:
  - Attach an email approval under the notes/attachments section of document or
  - “Ad hoc” approve the TRAV-Pxxx. This only needs to be done one time for each trip (either on the TA or on the TR), unless the traveler is also the fiscal officer



Questions?

