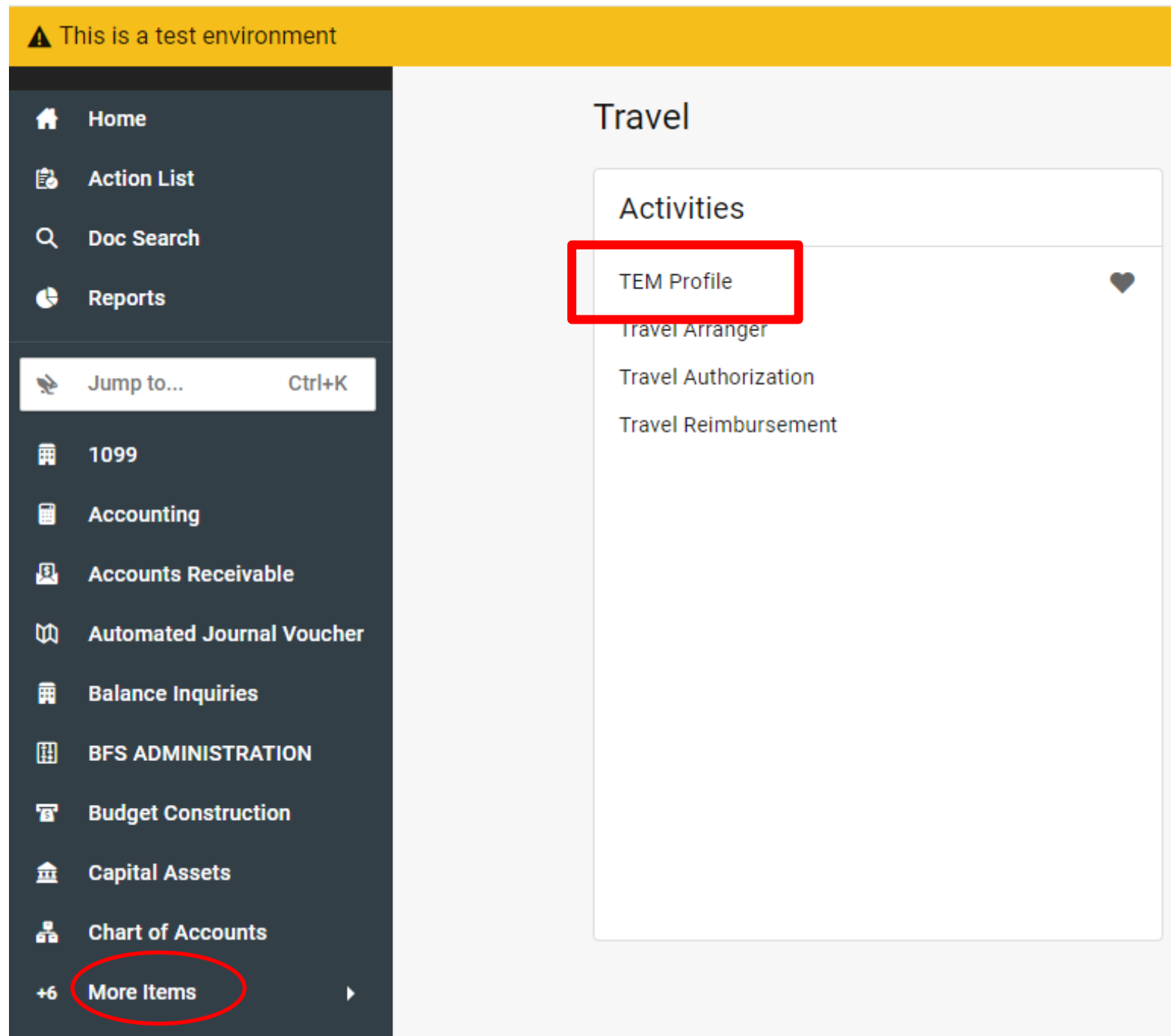


TEM Profile

-step by step-

- **First step in initiating travel**
 - Arranger and traveler must have the TEM Profile created before any travel documents can be created
- **Located on the More Items**
 - Travel => TEM Profile



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
 - 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

https://ktmg.is.colostate.edu/kfs-tmg/kr/lookup.do?methodToCall=start&businessObjectClassName=org.kuali.kfs.module.tem.businessobject.TemProfile&docFormKey=60080808&hideReturnLink=true&returnLocation=https://ktmg.is.c

Travel Services - Business a... KFS - Lookup

File Edit View Favorites Tools Help

kuali | Financials

Action List DocSearch Terri

This is a test environment Back Door ID Login

TEM Profile Lookup

create my profile create new from kim create new from customer

KIM Principal Name: AR Customer Id:

First Name: Last Name:

Traveler Type Code: Primary Department Code:

Chart Code: Account Number:

Return Only my Travelers?: Active:

Yes No Both Yes No Both

Search Clear Cancel

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
- Asterisks denote required field entered by user
 - 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 autopopulated

The screenshot shows a web browser window displaying the Kuali Financials interface. The browser address bar shows a URL from colostate.edu. The page header includes the Kuali logo and 'Financials' text. A yellow banner at the top indicates 'This is a test environment' and 'Impersonating ajglaze@colostate.edu'. On the right, there are links for 'Action List', 'Doc Search', 'Login', and 'Logout'. Below the banner, the document title is 'TEM Profile'. To the right of the title, a red arrow points to the document number 'Doc Nbr: 20940249'. Other details include 'Initiator: ajglaze@colostate.edu', 'Status: INITIATED', and 'Created: 01:45 PM 11/08/2019'. There are 'EXPAND ALL' and 'COLLAPSE ALL' buttons. The main content area is titled 'DOCUMENT OVERVIEW' and contains an 'OVERVIEW' section. A red arrow points to the '* Description:' field, which contains the text 'New Traveler Profile for Benker, Amanda'. To its right is an 'Explanation:' field. Below these is an 'Organization Document Number:' field. Further down, there are sections for 'EDIT TEMPROFILE', 'EMERGENCY CONTACTS', 'PAYMENT METHOD', and 'ARRANGERS'. At the bottom, there is a 'NEW ARRANGER INFORMATION' section with a '* PRINCIPAL NAME:' field and a search icon. At the very bottom, there are 'Submit', 'Save', 'Close', and 'Cancel' buttons.

TEM Profile

-step by step-

- **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
 - Traveler can assign arranger by clicking the magnifying glass next to Principal Name
 - To give access to create TA and TR must check the boxes
 - **Do Not** check Primary box, should be left blank on all TEM Profiles
 - Once added, make sure to click add

EMERGENCY CONTACTS

NEW EMERGENCY CONTACTS

* Contact Relation Type Code: Spouse

* Contact Name: John Doe

Contact Phone Number: 970-555-5555

Email Address:

ADD

PAYMENT METHOD

ACH Sign Up:

ACH Transaction Type:

ARRANGERS

NEW ARRANGER INFORMATION

* PRINCIPAL NAME:

Allow to initiate TA document:

Allow to initiate TR/RELO/ENT document:

Primary:

Active:

ADD

ARRANGERS

NEW ARRANGER INFORMATION

* PRINCIPAL NAME: ajglaze@colostate.edu

Allow to initiate TA document:

Allow to initiate TR/RELO/ENT document:

Primary:

Active:

ADD

TEM Profile -step by step-

- Email Notifications
 - Any box that is checked will send you 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

The screenshot displays the TEM Profile system interface. At the top, the 'EMAIL NOTIFICATION PREFERENCES' section is highlighted with a red box. It contains a 'NEW' button and four notification options, each with an unchecked checkbox: 'Travel Authorization (TA) FINAL', 'Travel Authorization (TA) Status Change', 'Travel Expense Report (TR, ENT, RELO) FINAL', and 'Travel Expense Report (TR, ENT, RELO) Status Change'. Below this, the 'ADMINISTRATOR' section is circled in red. It is titled 'NEW CORPORATE CREDIT CARD AND EXTERNAL AGENCY ACCOUNTS' and includes a form for adding a credit card. The form fields are: '* CREDIT CARD OR AGENCY NAME:' (with a dropdown icon), '* Account Number:' (text input), 'Expiration Date:' (calendar icon), and 'Effective Date:' (calendar icon). A 'Note:' text area is also present. The '* Active:' checkbox is checked. A green 'ADD' button is located below the form. At the bottom right, the 'Profile Status' section shows 'KIM Principal Id: 83620', 'AR Customer Id:', and '* Active:' checked. At the very bottom, there are buttons for 'Submit', 'Save', 'Close', and 'Cancel', and a 'NOTES AND ATTACHMENTS (0)' section.

TEM Profile: CSU Employee – created by Travel Arranger – -step by step-

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 employees
 - If you do not have this option, you are not set up as a travel arranger

NON-EMPLOYEES:

- Dept. travel arrangers fill out the [TEM Arranger Form](#) for permission and access to create traveler’s profile and travel on behalf of the traveler
 - See slide 11 for guide

The screenshot shows the 'TEM Profile Lookup' interface. At the top right, there are three buttons: 'create my profile', 'create new from kim', and 'create new from customer'. A red arrow points to the 'create new from kim' button, which is also circled in green. Below the buttons are several input fields:

- KIM Principal Name: [text input]
- AR Customer Id: [text input]
- First Name: [text input]
- Last Name: [text input]
- Traveler Type Code: [dropdown menu]
- Primary Department Code: [text input]
- Chart Code: [dropdown menu]
- Account Number: [text input]
- Return Only my Travelers?: Yes No Both
- Active: Yes No Both

At the bottom of the form are three buttons: 'Search', 'Clear', and 'Cancel'.

TEM Profile: CSU Employee – created by Travel Arranger -step by step-

- Once in TEM Profile Lookup screen, click “create new from kim” for current CSU employees
 - If you do not have this option, you are not set up as a travel arranger.
- By clicking “create new from KIM” it takes you to the “TEM Profile from KIM Person Lookup” screen shown on slide 9.

create my profile create new from kim create new from customer

KIM Principal Name:

AR Customer Id:

First Name:

Last Name:

Traveler Type Code:

Primary Department Code:

Chart Code:

Account Number:

Return Only my Travelers?: Yes No Both

Active: Yes No Both

TEM Profile: CSU Employee – created by Travel Arranger -step by step-

- Search an for 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
- By clicking “create new profile” will take you will follow the process on slides 3-6

TEM Profile From Kim Person Lookup

All
Searchable
Fields

Principal Name:

Principal Id:

Employee Id:

Entity Id:

First Name:

Middle Name:

Last Name:

Email Address:

Phone Number:

Employee Status Code:

Employee Type Code:

Primary Department Code:

Campus Code:

Active:

Yes No Both

Search

Clear

Cancel

[edit profile](#)

capsmith@colostate.edu

1213

822520287

9975

Charles

AP

Sm

[create new profile](#)

cwsmith@colostate.edu

10672

823215324

9976

Charles

W

Sm

[create new](#)

TEM Profile: CSU Employee – created by Travel Arranger -step by step-

- 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

EDIT TEMPROFILE ✱

	PREVIOUS	PROPOSED
	TEM Profile	TEM Profile
Traveler Type Code:	Employee	Employee
Last Update:	03/29/2016	11/11/2019 ✱
Updated By:	chrish@colostate.edu	tbedan@colostate.edu ✱
First Name:	ADAM	ADAM
Middle Name:	S	S
Last Name:	SMITH	SMITH
Employee ID:	824456095	824456095
Primary Department Code:	CO-6023	CO-6023
Driver's License Number:	*****	*****
Driver's License State:	*****	*****
Driver's License Expiration Date:	*****	*****
Motor Vehicle Record Check:	No	No
Date Of Birth:	*****	*****
Citizenship:	United States	United States
Non Resident Alien:	No	No
Gender:	*****	*****
	Default Accounting	Default Accounting
Chart Code:	CO - Colorado State University	CO - Colorado State University

TEM Profile: Non CSU 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 an FYI in their action list.
- When you receive the FYI, in TEM Profile Lookup, click “create new from customer”

The screenshot shows the 'TEM Profile Lookup' form. At the top right, there are three buttons: 'create new from kim', 'create new from customer', and 'create new from customer'. A red arrow points from the 'create new from kim' button to the 'create new from customer' button. A green circle highlights the 'create new from customer' button. The form contains the following fields:

KIM Principal Name:	AR Customer Id:
<input type="text"/>	<input type="text"/>
First Name:	Last Name:
<input type="text"/>	<input type="text"/>
Traveler Type Code:	Primary Department Code:
<input type="text"/>	<input type="text"/>
Chart Code:	Account Number:
<input type="text"/>	<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

At the bottom of the form, there are three buttons: Search, Clear, and Cancel.

TEM Profile

-step by step-

- Choose "create new profile" for non-employees without an existing profile
- Follow the same Process as New Profile (slides 3-6)
- If they already exists, select edit profile for non-employees with existing profile

Tem Profile From Customer Lookup

All
Searchable
Fields

Customer Number:

Customer Name:

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:

International Postal Code:

Customer Email Address:

Search Results

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
edit profile	JAC2008	11	JACK KOOLEN		*****		Yes	JACK KOOLEN	APT BLDG 47 EAST CAMPUS USTC	KIMZHA 96