

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 Main Page**
 - Travel => TEM Profile

The screenshot displays the Kualu Financials web application interface. The browser address bar shows the URL: <https://ktmg.is.colostate.edu/ktf-tmg/webapp/dashboard/travel>. The page header includes the Kualu Financials logo, a navigation menu with 'Action List', 'Doc Search', and 'Terr', and a 'Back Door ID' field. A yellow banner at the top indicates 'This is a test environment'. The main content area is divided into three columns: 'Travel', 'REFERENCE', and 'ADMINISTRATION'. The 'Travel' column contains a sub-menu with 'ACTIVITIES', 'REFERENCE', and 'ADMINISTRATION'. The 'ACTIVITIES' sub-menu is expanded, showing 'TEM Profile', 'Travel Arranger', 'Travel Authorization', and 'Travel Reimbursement'. The 'REFERENCE' column contains 'TEM TRAINING'. The 'ADMINISTRATION' column lists various settings such as 'Accommodation Type', 'Advance Payment Reason', 'Agency Service Fee', 'Airfare Source', 'Class Of Service', 'Contact Relation Type', 'Credit Card Agency', 'Expense Type Object Code', 'Entertainment Purpose', 'Expense Type', 'Job Classification', and 'Mileage Rate'. The left sidebar navigation menu includes 'HOME', 'Jump to... Ctrl+K', 'ACCOUNTING', 'ACCOUNTS RECEIVABLE', 'AUTOMATED JOURNAL VOUCHER', 'BALANCE INQUIRIES', 'BUDGET CONSTRUCTION', 'CAPITAL ASSETS', 'CHART OF ACCOUNTS', 'PRE-DISBURSEMENT', 'PROCUREMENT & ACCOUNTS PAYABLE', 'SYSTEM', 'TRAVEL', 'VENDOR', 'HELP', and 'ABOUT'. The 'TRAVEL' menu item is highlighted with a yellow circle, and the 'TEM Profile' option in the 'ACTIVITIES' sub-menu is highlighted with a red circle.

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 long have the option to “create my profile”, but you can search by your first and last name to make an necessary edits to your profile

https://ktrng.is.colostate.edu/kfs-trng/kr/lookup.do?methodToCall=start&businessObjectClassName=org.kuali.kfs.module.tem.businessobject.TemProfile&docFormKey=60080808&hideReturnLink=true&returnLocation=https://ktrng.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 displays the Kuali Financials interface. At the top, the browser address bar shows the URL: <https://ktrng.is.colostate.edu/kfs/trng/kr/maintenance.do?businessObjectClassName=org.kuali.kfs.module.tem.businessobject.TemProfile&overrideKey=principalId&refreshCaller=principalId%3A%3A83620&principalId=83620&method1>. 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', and 'Terri'. Below the banner, a status bar shows 'Doc Nbr: 20940249', 'Initiator: ajglaze@colostate.edu', 'Status: INITIATED', and 'Created: 01:45 PM 11/08/2019'. The main content area is titled 'TEM Profile' and features an 'OVERVIEW' section. A red arrow points to the '* Description' field, which contains the text 'New Traveler Profile for Benker, Amanda'. Another red arrow points to the 'Doc Nbr' field in the status bar. Below the description field is the 'Organization Document Number' field. The interface also includes 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 buttons for 'Submit', 'Save', 'Close', and 'Cancel'.

TEM Profile

-step by step-

- **TEM Profile for ALL Kuali Users**
- **Edit TemProfile Tab**
- Document automatically pulls information from Kuali
 - Traveler Type
 - First, Last Name, Middle Initial
 - Employee ID, Dept. Code
 - CSU 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**

The screenshot shows the Kuali Financials interface for editing a TEM Profile. The user is impersonating 'ajglaze@colostate.edu'. The form contains the following fields:

- Traveler Type Code: Employee
- Last Update:
- Updated By:
- First Name: AMANDA
- Middle Name: J. [REDACTED]
- Last Name: BENKER
- Employee ID: 831 [REDACTED]
- Primary Department Code: CO-6003
- Driver's License Number: [REDACTED]
- Driver's License State: [REDACTED]
- Driver's License Expiration Date: [REDACTED]
- Motor Vehicle Record Check:
- * Date Of Birth: [REDACTED]
- * Citizenship: [REDACTED]
- * Non Resident Alien: Yes No
- * Gender: Male Female
- Default Accounting
 - * Chart Code: CO - Colorado State University
 - Account Number: [REDACTED] (indicated by a red arrow)
 - Sub-Account Number: [REDACTED]

Buttons at the bottom: Submit, Save, Close, Cancel.

TEM Profile

-step by step-

- **TEM Profile for ALL Quali 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: 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, all with unchecked checkboxes:

- Travel Authorization (TA) FINAL:
- Travel Authorization (TA) Status Change:
- Travel Expense Report (TR, ENT, RELO) FINAL:
- Travel Expense Report (TR, ENT, RELO) Status Change:

Below this is the 'ADMINISTRATOR' section, also highlighted with a red circle. It is titled 'NEW CORPORATE CREDIT CARD AND EXTERNAL AGENCY ACCOUNTS'. The form includes the following fields:

- * CREDIT CARD OR AGENCY NAME:
- * Account Number:
- Expiration Date:
- Effective Date:
- Note:
- * Active:

A green 'ADD' button is located below the 'Active' checkbox. Below the form, the 'Profile Status' section displays:

- KIM Principal Id: 83620
- AR Customer Id:
- * Active:

At the bottom of the page, there is a 'NOTES AND ATTACHMENTS (0)' section and a row of buttons: 'Submit', 'Save', 'Close', and 'Cancel'.

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 an arranger for anyone
 - To get this access fill out the [TEM Arranger Application](#)

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

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:

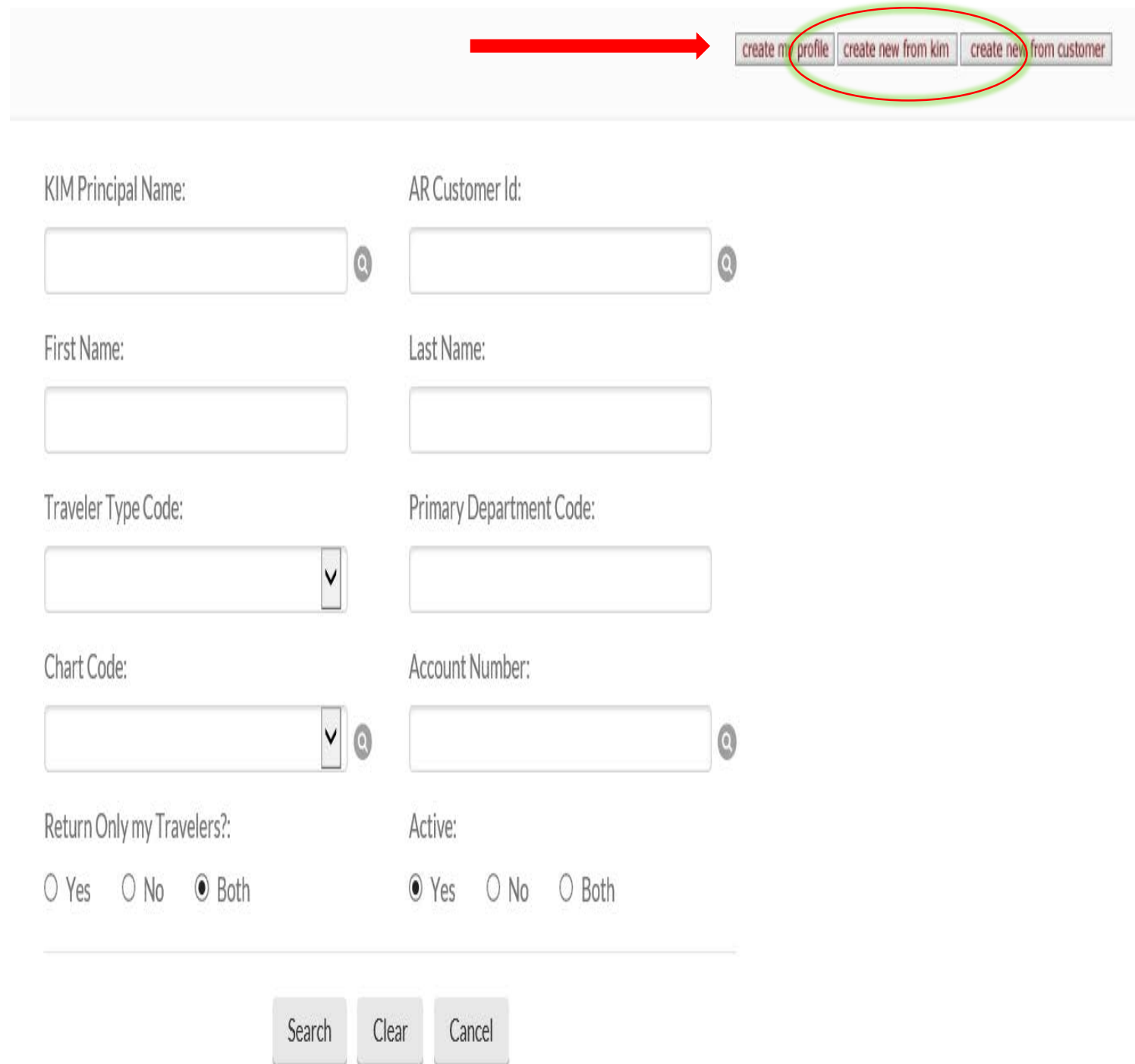
Return Only my Travelers?: Yes No Both

Active: Yes No Both

Search Clear 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 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 slide 9.



The screenshot shows the TEM Profile Lookup screen. 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 red. Below the buttons, there are several input fields and dropdown menus:

- 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 screen, there are three buttons: "Search", "Clear", and "Cancel".

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
 - To get this access fill out the [TEM Arranger Application](#)
- 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: | <input type="text"/> | Principal Id: | <input type="text"/> |
| Employee Id: | <input type="text"/> | Entity Id: | <input type="text"/> |
| First Name: | <input type="text"/> | Middle Name: | <input type="text"/> |
| Last Name: | <input type="text" value="smith*"/> | 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 |

| | | | | | | | |
|------------------------------------|------------------------|-------|-----------|------|---------|----|----|
| edit profile | capsmith@colostate.edu | 1213 | 822520287 | 9975 | Charles | AP | Sm |
| create new profile | cywsmith@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 email saying it has been created
- When you receive the email, in TEM Profile Lookup, click “create new from customer”

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?: Yes No Both Active: Yes No Both

Search Clear Cancel

TEM Profile

-step by step-

- Choose create new profile for non-employees with no 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 Phone Number:

Customer Tax Number Type Code:
 FEIN SSN NONE

Address Name:

Street Address Line2:

State:

International Province:

Customer Email Address:

Customer Name:

Customer Tax Number:

Active:
 Yes No Both

Street Address Line1:

City Name:

Zip Code:

International Postal Code:

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 |