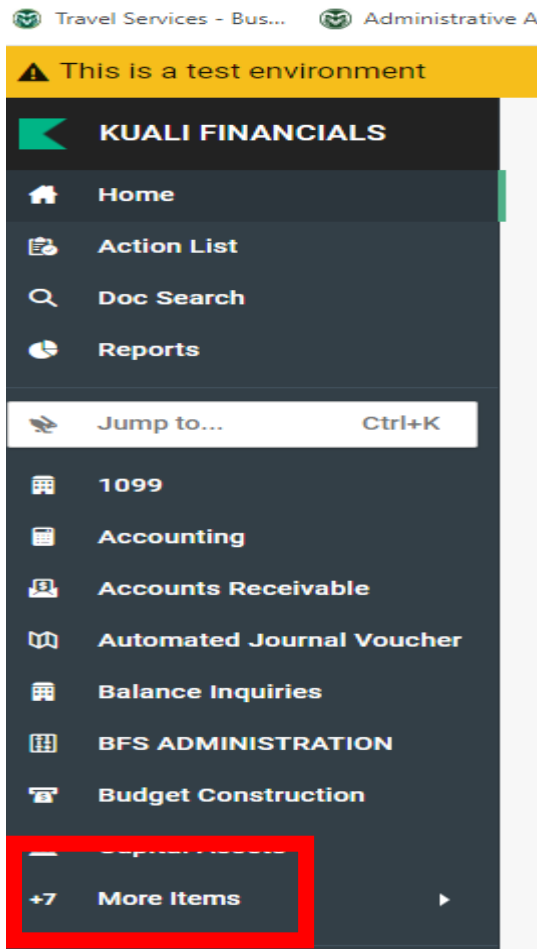**Adding Travel Arranger to TEM Profiles**
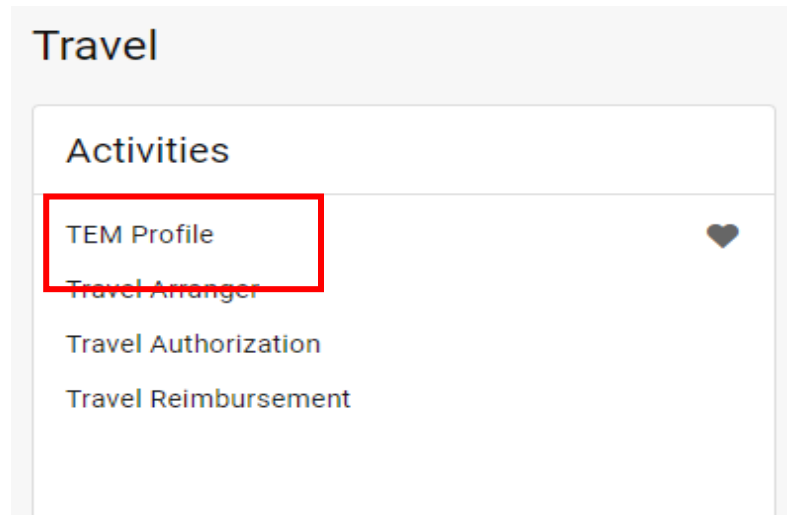
Once a travel arranger has submitted the Kuali Access form, they are automatically given travel arranger access.

In order to create travel documents, the travel arranger must add themselves to their departmental travelers TEM profiles.

Under Kuali Financial, click on More Items and then on Travel.

Click on TEM Profile

The TEM Profile Lookup will open

Type the traveler's first name with the * wild card and then type the traveler's last name with the * wild card.

Click Search and then click edit

If the traveler is in your department, the TEM Profile will load

Under Document Overview and in the Description box, type <u>Add Travel Arranger</u>

Scroll down to Arrangers and under New Arranger Information is where you will add yourself.

ARRANGERS

NEW ARRANGER INFORMATION

* PRINCIPAL NAME:	🔍
Allow to initiate TA document:	☐
Allow to initiate TR/RELO/ENT document:	☐
Primary:	☐
Active:	☑
	ADD

Next to Principal Name, click on the magnifying glass

* PRINCIPAL NAME:	🔍
Allow to initiate TA document:	☐
Allow to initiate TR/RELO/ENT document:	☐
Primary:	☐
Active:	☑
	ADD

The Person Lookup screen will open. Type your first name followed by the *, then type your last name followed by the * and click Search

This is a test environment

Person Lookup ⓘ

Principal Name:	Principal ID:
Entity ID:	First Name:
	terri*
Middle Name:	Last Name:
	bedan*
Email Address:	Employee ID:
Primary Department Code:	Active:
	⦿ Yes ◯ No ◯ Both

Search   Reset Form   Cancel

Click return value

Search Results

Return Value	Principal ID	Principal Name	Name	Entity ID	Campus Code	Primary Department Code
return value	822636417	tbedan@colostate.edu	Bedan, Terri L	4697	MC	CO-6003

Export options: CSV | spreadsheet | XML

When you return to the TEM Profile screen, check the Allow to initiate TA document and the Allow to initiate TR/RELO/ENT document boxes. Click the ADD button. **DO NOT** check the Primary box.

Your information should look like this


Scroll down and click Submit

Once the Status changes from ENROUTE to FINAL, you can create travel documents for your departmental travelers.

Doc Nbr : 35839199
Initiator : tbedan@colostate.edu
Status : ENROUTE
Created : 03:35 PM 05/29/2024

Doc Nbr : 35839199
Initiator : tbedan@colostate.edu
Status : FINAL
Created : 03:35 PM 05/29/2024

Adding Travel Arranger to TEM Profiles Using the Travel Arranger Function

At times, it may be necessary to create travel documents for travelers in another department.

Under Kuali Financial, click on More Items and then on Travel.
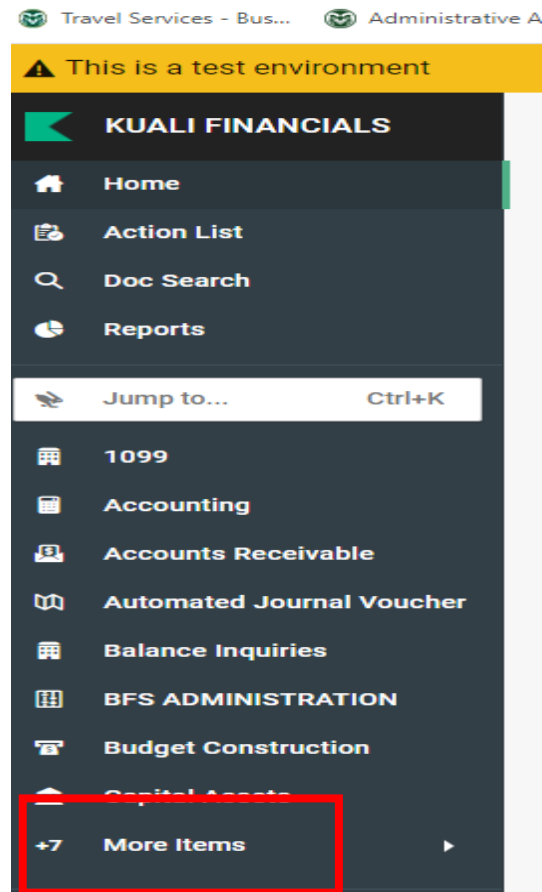
Click on Travel Arranger

Under Document Overview and in the Description box, type Request to Become Arranger
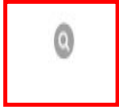
Under Traveler Section and next to Traveler Lookup, click on the magnifying glass

The TEM Profile Lookup will open

Type traveler's first name with the * wild card and then type the traveler's last name with the * wild card. Click Search

The TEM Profile Lookup Screen will load. Click return value

Under Edit Request and next to Request to become an arranger, check the Please delegate authority to initiate the travel authorization for your trip and Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip boxes. **DO NOT** check the Primary Arranger box.

EDIT REQUEST

EDIT REQUEST

Notification to resign from arranger :

☐

Request to become an arranger:

Please delegate authority to initiate the travel authorization for your trip. ☑

Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip. ☑

Primary Arranger ☐

Scroll down and click Submit

The Route Log shows that the request is waiting for the traveler to approve the request. We highly recommend contacting the traveler to let them know this is waiting for their approval

ACTIONS TAKEN

	Action	Taken By	For Delegator
	COMPLETED	Torrez, Patricia Lynn	

PENDING ACTION REQUESTS

	Action	Requested Of
Show	**IN ACTION LIST APPROVE**	DeMint, Christopher James ⬈ Impersonate

Once the traveler approves your request, the document will change from Enroute to Final and you'll be able to create travel documents for travelers that are not in your department.