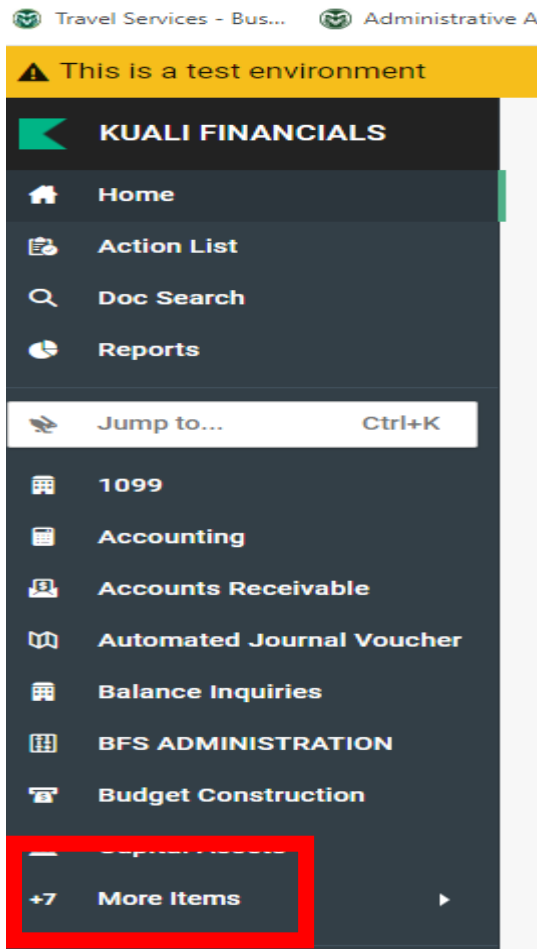


Adding Travel Arranger to TEM Profiles

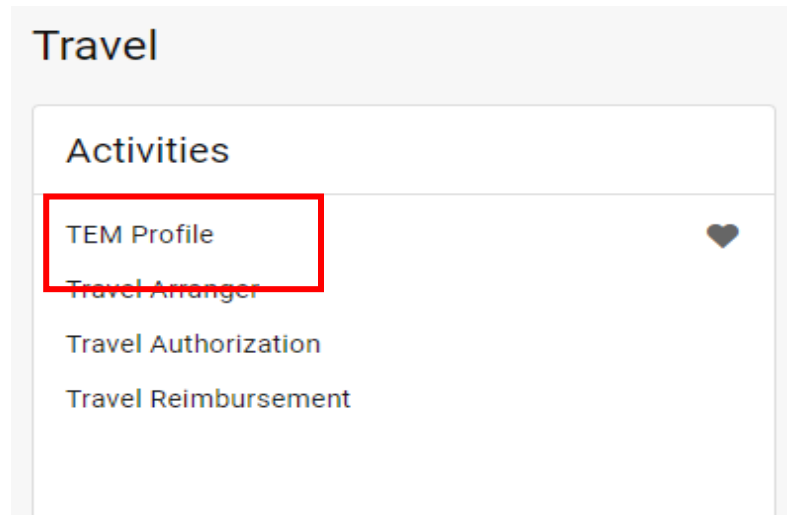
Once a travel arranger has submitted the Kualu Access form, they are automatically given travel arranger access.

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

Under Kualu Financials, click on More Items and then on Travel.



Click on TEM Profile



The TEM Profile Lookup will open

TEM Profile Lookup ? Create min

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

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

TEM Profile Lookup ? Create r

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

Click Search and then click edit

TEM Profile Lookup ?

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 Results 1-1 of 1

Actions	Profile Id	KIM Principal Name	AR Customer Id	First Name	Last Name	Street Address Line1	City Name	State	Zip Code	Country	Email	Phone Number	Active
<input type="button" value="edit"/>	1318	chrieku5@colostate.edu		CHRISTOPHER	DEMINT	6003 CAMPUS DELIVERY	FORT COLLINS	CO	80523-6003	US	CHRIS.DEMINT@COLOSTATE.EDU	970-491-2291	Yes

Export options: CSV | spreadsheet | XML

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

TEM Profile Initiator: tbedan@colostate.edu Created: 03:35 PM 05/29/2024

[EXPAND ALL](#) [COLLAPSE ALL](#)

DOCUMENT OVERVIEW ^

OVERVIEW

* Description : Explanation :

Organization Document Number :

EDIT TEMPROFILE ^

	PREVIOUS	PROPOSED
	TEM Profile	TEM Profile
Traveler Type Code:	Employee	Employee
Last Update:	06/29/2016	06/29/2016
Updated By:	chrisku5@colostate.edu	chrisku5@colostate.edu
First Name:	CHRISTOPHER	CHRISTOPHER
...

Under Document Overview and in the Description box, type Add Travel Arranger

DOCUMENT OVERVIEW

OVERVIEW

* Description :

Organization Document Number :

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

ARRANGERS

NEW ARRANGER INFORMATION

* PRINCIPAL NAME:	<input type="text"/>
Allow to initiate TA document:	<input type="checkbox"/>
Allow to initiate TR/RELO/ENT document:	<input type="checkbox"/>
Primary:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>
<input type="button" value="ADD"/>	

Next to Principal Name, click on the magnifying glass

* PRINCIPAL NAME:	<input type="text"/>
Allow to initiate TA document:	<input type="checkbox"/>
Allow to initiate TR/RELO/ENT document:	<input type="checkbox"/>
Primary:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>
<input type="button" value="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:	<input type="text"/>	Principal ID:	<input type="text"/>
Entity ID:	<input type="text"/>	First Name:	<input type="text" value="terri*"/>
Middle Name:	<input type="text"/>	Last Name:	<input type="text" value="bedan*"/>
Email Address:	<input type="text"/>	Employee ID:	<input type="text"/>
Primary Department Code:	<input type="text"/>	Active:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both

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.

ARRANGERS ✨

NEW ARRANGER INFORMATION ✨

* PRINCIPAL NAME:	tbedan@colostate.edu ✨ 🔍
Allow to initiate TA document:	<input checked="" type="checkbox"/>
Allow to initiate TR/RELO/ENT document:	<input checked="" type="checkbox"/>
Primary:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>

[ADD](#)

Your information should look like this

ARRANGER INFORMATION (TBEDAN@COLOSTATE.EDU) ✨ [Hide](#)

PREVIOUS		PROPOSED	
Principal Name:		* Principal Name:	tbedan@colostate.edu ✨ 🔍 ✨
Allow to initiate TA document:	No	Allow to initiate TA document:	<input checked="" type="checkbox"/> ✨
Allow to initiate TR/RELO/ENT document:	No	Allow to initiate TR/RELO/ENT document:	<input checked="" type="checkbox"/> ✨
Primary:	No	Primary:	<input type="checkbox"/>
Active:	Yes	Active:	<input checked="" type="checkbox"/>

[DELETE](#)

Scroll down and click Submit

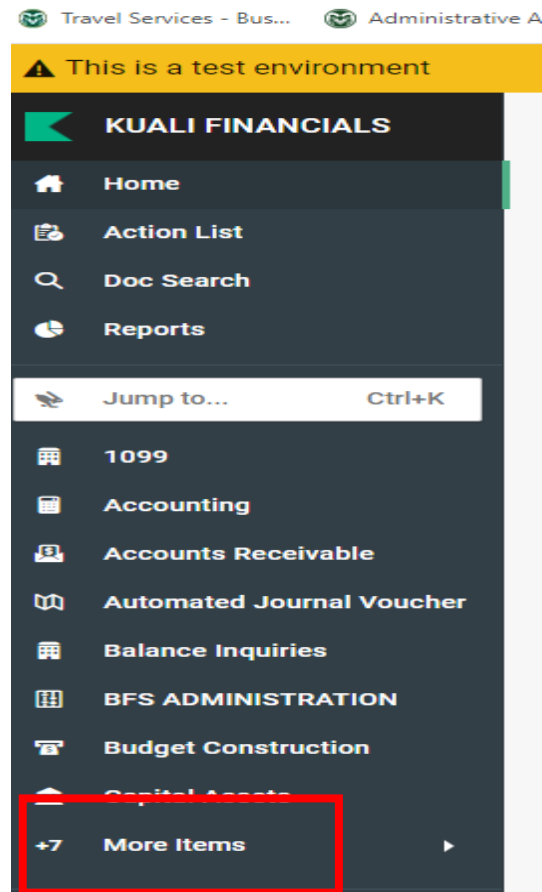
Once the Status changes from ENROUTE to FINAL, you can create travel documents for your departmental travelers.

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 Kualu Financial, click on More Items and then on Travel.



Click on Travel Arranger

Travel

Activities

- TEM Profile 
- Travel Arranger** 
- Travel Authorization 
- Travel Reimbursement 

Under Document Overview and in the Description box, type Request to Become Arranger

Travel Arranger

DOCUMENT OVERVIEW

OVERVIEW

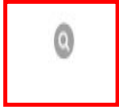
* Description :

Organization Document Number :

Under Traveler Section and next to Traveler Lookup, click on the magnifying glass


TRAVELER SECTION


TRAVELER

Traveler Lookup: 

The TEM Profile Lookup will open


TEM Profile Lookup ? Create min

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

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

TEM Profile Lookup ? Create r

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

The TEM Profile Lookup Screen will load. Click return value

TEM Profile Lookup ?

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 Results


Return Value	Profile Id	KIM Principal Name	AR Customer Id	First Name	Last Name	Street Address Line1	City Name	State	Zip Code	Country
return value	13185	chrisku5@colostate.edu		CHRISTOPHER	DEMINT	6003 CAMPUS DELIVERY	FORT COLLINS	CO	80523-6003	US

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 :	<input type="checkbox"/>
Request to become an arranger:	<input checked="" type="checkbox"/> Please delegate authority to initiate the travel authorization for your trip. <input checked="" type="checkbox"/> Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip. <input type="checkbox"/> 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		
<input type="button" value="Show"/>	Action IN ACTION LIST APPROVE	Requested Of 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.