TEM Profile
-step by step-

• First step in initiating travel

• Located on Main Menu
  • Lookup and Maintenance
  • 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
  • Before a travel arranger can create TEM Profiles or travel documents for a traveler, they first must create their own TEM Profile.
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
TEM Profile - step by step -

- TEM Profile for ALL Kuali Users
- Edit TemProfile Tab

  - Document automatically pulls information from Kuali
    - Traveler Type
    - Frist, 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
      - Must enter in an account number, the account number can be changed at any time in the TA, TR, or the TEM Profile

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TEM Profile
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• 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
    • Once added make sure to click add

• Payment Method
  • Automatic – do not update

• Arrangers Tab
  • Arranger Principal Name
    • 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
    • One and only one Arranger must be primary
    • Once added, make sure to click add
TEM Profile -step by step-

- Email Notifications
  - Any box that is checked will send you an email based on that information
  - Checked boxes will override email preferences already set for Traveler in action list

- Administrator – Credit Card
  - DO NOT FILL OUT THIS SECTION

- Once document is complete hit submit
- If document isn’t complete, click save and you can return at any point to document
  - It can be retrieved in your action list
TEM Profile: CSU Employee – created by Travel Arranger -step by step-

- All designated Dept. Travel Arrangers can set up TEM Profiles for Dept. travelers

- 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

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

- Search using numerous criteria
- 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
TEM Profile: CSU Employee – created by Travel Arranger -step by step-

- **Create New From KIM**
  - Current CSU Employee

- **Create New Profile**
  - Same Process as New Profile

- **Edit Profile**
  - Enter New Information on right side of the document only
TEM Profile: Non CSU Employee
-step by step-

• **Create New From Customer**
  • Non-Employee (Including Students)
• Non-Employee **must** be set up as existing customer in Kuali
• Must fill out the **A/R Customer Form**
• When it is complete, will receive email it is created.
• After you receive email, In TEM Profile Lookup, click “create new from customer”
TEM Profile
-step by step-

- Choose create new profile for non-employees with no existing profile
- Follow the same process as New Profile
- If they already exist, select edit profile for non-employees with existing profile

All Searchable Fields