Travel & Expense Management System (TEM)

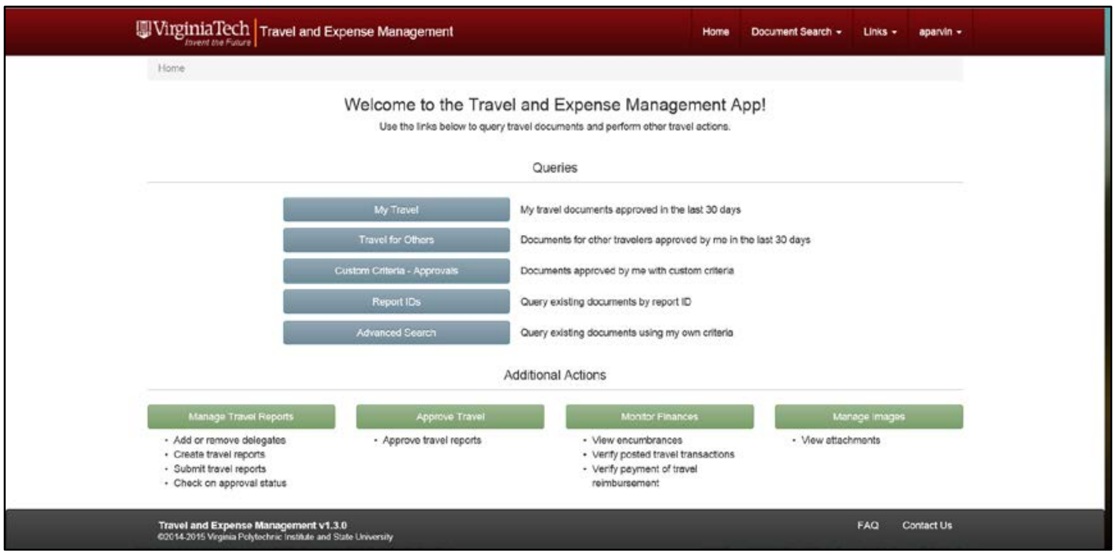
Intro and Initial User Set up

New system for electronically processing **Travel Approvals (TA)** and **Travel Reimbursements (TR)**. This system will electronically route documents for approvals and encumber funds when TAs are submitted.

The ISE procedures will remain the same. Nicole, Teresa & Angie will still enter the information necessary to initiate the TAs and to process the TRs. Travelers and their supervisors will review and approve the information entered.

To access TEM:

> Log into **Hokie SPA** (under quick links on VT homepage) using PID and CAS password,
> Select **Hokie Team,**
> Select **TEM Application**, this will take you to the TEM home screen (below),



When accessing TEM for the first time, travelers need to:

1. <u>Check their profile</u> to assure their <u>current address</u> is reflected correctly.
   > From the home screen, select **Manage Travel Reports** (green box in lower left),
   > Click on the **Profile** tab (upper left),
   > If address requires updating, click on the corresponding "**pencil**" icon (upper right) to display other addresses that the university has associated with you,
   > **Click** on the appropriate address, and
   > Click **Select** (bottom right).

   If your correct address is not reflected, you will need to get this added to Banner (see Nicole).

2. <u>Confirm delegates</u> so that your TA and TR documents can be initiated by the ISE staff.
   All ISE travelers should have 3 delegates - <u>Teresa Coalson</u>, <u>Nicole Conner</u>, and <u>Angie Parvin</u>.
   If you do not, use the following to add a delegate(s) as necessary:
   > From the home screen, select **Manage Travel Reports** (green box in lower left),
   > Click on the **Profile** tab (upper left),
   > Click on the **Assign Delegate** tab (upper left),
   > Click on the **Add Delegate** button (bottom right),

- > Click on the arrow to expand **Advanced Search**,
- > Click on the arrow to expand **Select Attribute**,
- > Select **Last Name**, and type the last name of the employee,
- > Select **Go**,
- > From the generated search list, click on the individual you wish to add,
- > Click on **Select**,
- > Click on **Save**.

3. Assure <u>email notifications</u> is activated so you receive notification of documents requiring your approval.
   - > From the home screen, select **Approve Travel** (green box in lower left),
   - > From the "User Profile" box (upper left), select **User Information**,
   - > Click on the **Notifications** link (center),
   - > Assure that "Activity Notifications" <u>and</u> "Deadline Notifications" both indicate "Yes". If not, change to "Yes" and click **Save User Profile**.

4. For supervisors, <u>a Proxy</u>, or back up approver, can be set up.
   - > From the home screen, select **Approve Travel** (green box in lower left),
   - > From the "User Profile" box (upper left), select **User Information**,
   - > In the "My Roles" box in the center of the screen, select the **Add Proxy** link (right side),
   - > Click on the drop down arrow on the User line, and begin typing the PID for the person you wish to indicate as your proxy,
   - > Click on the correct **PID** to select,
   - > Indicate the **Effective From** date and time,
   - > Indicate the **Effective To** date and time,
   - > Select **Non-Confidential**,
   - > Click **Save**.

<u>Approver Training</u>

A 15 minute training session is available online and can be accessed from the Controller's website at: www.co.vt.edu. Select **Training Opportunities** from the menu on the left, then under Accounts Payable / Travel, select "**Banner Travel and Expense Management, Part II: Approver Guide**."

<u>Approver Quick Guide</u>

An approver guide can be accessed from the Controller's website at: www.co.vt.edu. Select **Training Manuals** from the menu on the left, then under Accounts Payable / Travel, select "**TEM Approver Quick Guide**."