

Travel & Expense Management System (TEM)

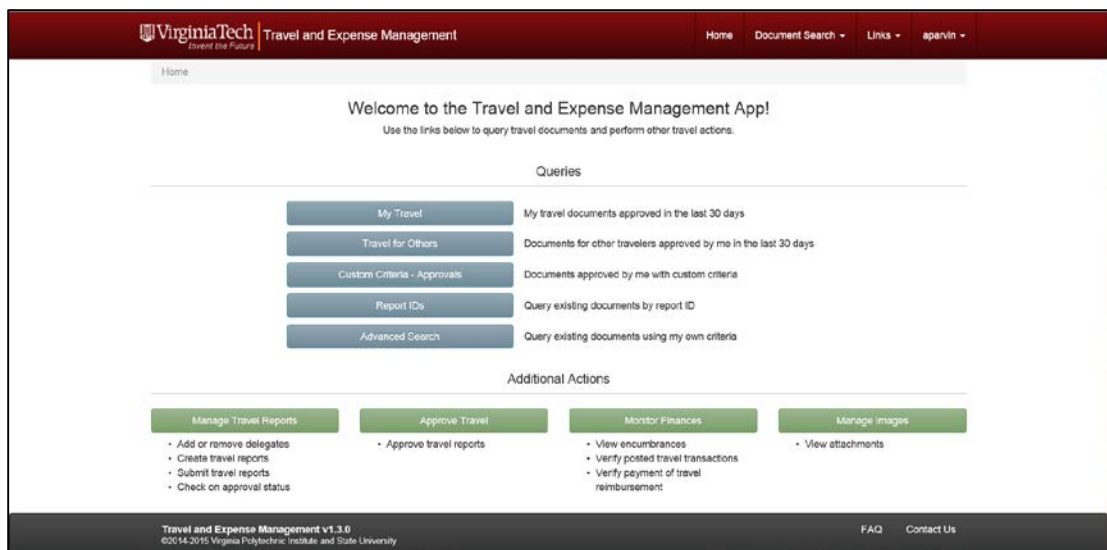
Intro and Initial User Set up

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. Check their profile to assure their current address 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. Confirm delegates so that your TA and TR documents can be initiated by the ISE staff. All ISE travelers should have 3 delegates - Teresa Coalson, Nicole Conner, and Angie Parvin. 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 email notifications 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” and “Deadline Notifications” both indicate “Yes”. If not, change to “Yes” and click **Save User Profile**.
4. For supervisors, a Proxy, 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**.

Approver Training

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.”**

Approver Quick Guide

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.”**

The screenshot shows the Virginia Tech Controller's Office website. The header includes the Virginia Tech logo and the text "Controller's Office". Below the header, there is a navigation menu on the left and a main content area. The main content area is titled "Training Opportunities" and lists several training sessions. The first session is "Banner Travel and Expense Management, Part II: Approver Guide", which is highlighted in yellow. This session provides a quick guide for authorized approvers to review and approve travel requests processed in the TEM system. Other sessions listed include "Banner Travel and Expense Management, Part I: Traveler Basics", "Banner Travel and Expense Management, Part III: Moving and Relocation Guide", "Banner Travel and Expense Management, Part IV: VTF Split Funding Guide", "Banner Finance Querying for Accounts Payable", "Travel Procedures", and "Department Reconciliations".

Description	Last Updated
Banner Travel and Expense Management, Part I: Traveler Basics Provides an overview of the Banner TEM application for travelers and delegates, including preparation of travel authorizations and travel reimbursements. (Online Training)	12/23/2014
Banner Travel and Expense Management, Part II: Approver Guide Provides a quick guide for authorized approvers to review and approve travel requests processed in the TEM system. (Online Training)	03/31/2015
Banner Travel and Expense Management, Part III: Moving and Relocation Guide Provides a quick guide for processing moving and relocation requests in the TEM system. (Online Training)	05/14/2014
Banner Travel and Expense Management, Part IV: VTF Split Funding Guide Provides a quick guide for VTF Split Funding in the TEM system. (Online Training)	05/14/2014
Banner Finance Querying for Accounts Payable The Banner Finance Accounts Payable Query class instructs the user to use Banner Finance Accounts Payable Query forms to retrieve information related to payment processing and check schedules. (Instructor Led Training)	11/19/2013
Travel Procedures The Travel Procedures program acquaints the participants with university travel procedures. (Instructor Led Training)	08/29/2013
General Accounting	
Description	Last Updated
Banner Finance Navigation The Banner Finance Navigation class provides basic instruction of navigation technique, explanation of menus, review of the parts of a form, and basic queries. (Online Training in Scholar) For information to set up the Scholar site, click here .	12/13/2010
Department Reconciliations The Department Reconciliation training provides an overview of procedures to reconcile	01/15/2013