

## ***Demonstration #2a: Cancelling an Authorization***

**Objectives:**

- Cancelling a travel authorization

**Notes:**

*This demonstration covers how to cancel an authorization. An amendment is used to cancel an authorization only when it has a status code of DATA LINK and when no expenses have been occurred. Once an authorization has been cancelled, it is “locked” and cannot be changed. The authorization number cannot be reused. Before cancelling an authorization, refer to the table below to determine if the authorization meets the specified criteria.*

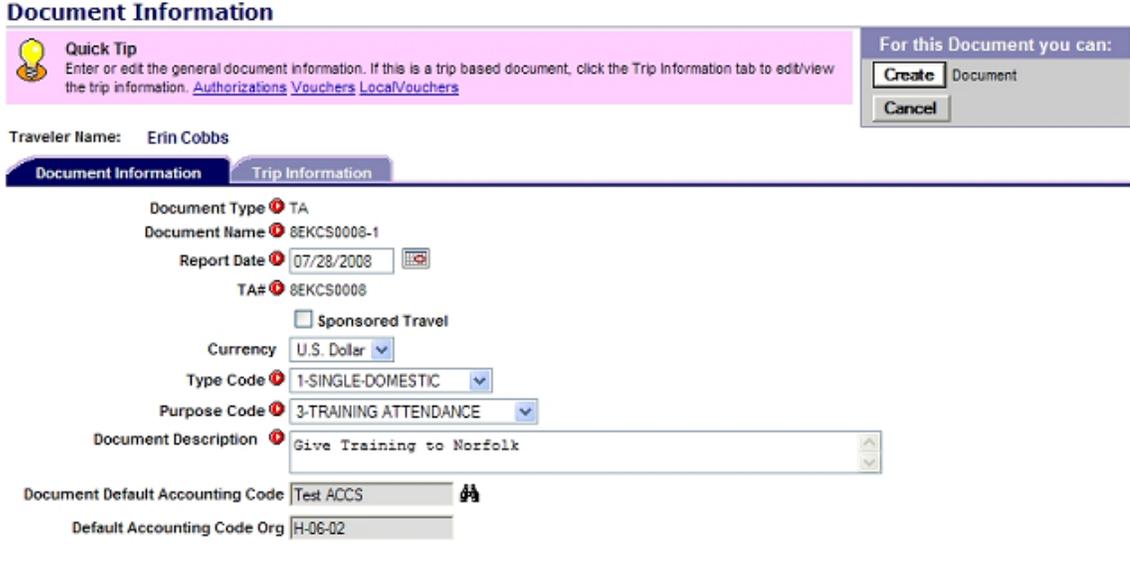
<b>Status of DATA LINK?</b>	<b>Transaction Fee?</b>	<b>Action</b>
NO	YES	<b>ADJUST</b> the travel authorization (TA) to reduce the document down to the Transaction Fee. Then electronically sign and approve the TA.
YES	YES	Create an <b>AMENDMENT</b> to reduce the TA down to the Transaction Fee. Then electronically sign and approve the amendment.
NO	NO	Delete the original authorization from ITM, or if your office wants to keep a record of all TAs regardless of whether the trip was taken or not, then electronically sign and approve the TA. Once the TA has been stamped “DATA LINK”, create an amendment to cancel the TA.
YES	NO	Create an <b>AMENDMENT</b> to cancel the authorization

**Instructions:** Execute the following steps:

The training class you were supposed to give in Norfolk, VA on Sept 23<sup>rd</sup> has been cancelled. You must go in and cancel the authorization that you created for this trip.

<b>Step</b>	<b>Action</b>
1	From the <b>Home</b> page: <ul style="list-style-type: none"> <li>➤ Click <b>Amend Document</b> from the <b>Document Toolbar</b></li> </ul>

Step	Action																						
2	<p>The <b>Traveler Listing/Document Search (Amendment)</b> will appear.</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="305 369 776 800"> <p><b>Traveler Listing (Amendment)</b></p> <p> <b>Quick Tip</b> Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents. <a href="#">Open/Copy Doc</a> <a href="#">Delete Doc</a> <a href="#">Amend Doc</a></p> <p><b>Enter Search Criteria</b></p> <p>Name (Last,First) <input type="text"/> <input type="button" value="Search"/></p> <p>Document Type <input type="text" value="ALL"/></p> <p><b>Traveler List</b> <span>Click on an entry to select it</span></p> <p>Search Results <span style="float: right;"><a href="#">Prev 40</a> <a href="#">Next 40</a></span></p> <table border="1"> <thead> <tr> <th>Name</th> <th>VNum</th> </tr> </thead> <tbody> <tr><td><a href="#">Cobbs, Erin</a></td><td>0000-65065</td></tr> <tr><td><a href="#">Germantown, Brenda</a></td><td>9900-00010</td></tr> <tr><td><a href="#">Germantown, Erin</a></td><td>9900-00008</td></tr> <tr><td><a href="#">Germantown, Jean</a></td><td>9900-00006</td></tr> <tr><td><a href="#">Germantown, Louis</a></td><td>9900-00025</td></tr> </tbody> </table> </div> <div data-bbox="824 369 1414 510"> <p><b>Document Search (Amendment)</b></p> <p><b>Document List</b> <span>Click on an entry to select it</span></p> <p>Traveler: Erin Cobbs</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Document Name</th> <th>Dep Date</th> <th>Status</th> <th>In Use</th> </tr> </thead> <tbody> <tr> <td></td> <td>8EKCS0008</td> <td>09/22/08</td> <td>COMPLETED</td> <td></td> </tr> </tbody> </table> </div> </div> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ For individual users (travelers), only their name will show on the Traveler's List and only if they have <b>DATALINKED</b> documents.</li> <li>✓ For Training purposes, documents with the status of <b>COMPLETED</b> will show.</li> </ul>	Name	VNum	<a href="#">Cobbs, Erin</a>	0000-65065	<a href="#">Germantown, Brenda</a>	9900-00010	<a href="#">Germantown, Erin</a>	9900-00008	<a href="#">Germantown, Jean</a>	9900-00006	<a href="#">Germantown, Louis</a>	9900-00025	Type	Document Name	Dep Date	Status	In Use		8EKCS0008	09/22/08	COMPLETED	
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2a	<ul style="list-style-type: none"> <li>➤ Click on the <b>Name</b> to bring up their documents</li> <li>➤ Click the <b>Amend</b>  icon of the document you wish to amend</li> </ul>																						
3	<p>The <b>Amendment</b> page appears.</p> <div data-bbox="293 1272 1422 1577"> <p><b>Amendment</b></p> <p> <b>Quick Tip</b> The amendment name is system generated. Enter the information below and click the Create button to amend the selected document. <a href="#">more</a></p> <p>Document to Amend <input type="text" value="8EKCS0008"/></p> <p>Comments <input type="text"/></p> <p>Signature PIN <input type="text"/></p> <p>Reason <input type="text"/></p> <p style="text-align: right;"><b>For this Document you can:</b> <input type="button" value="Create"/> New Amendment <input type="button" value="Cancel"/></p> </div> <ul style="list-style-type: none"> <li>➤ Enter <b>Class was cancelled – Need to cancel TA [TA#]</b> in the <b>Comments</b> field</li> <li>➤ Enter <b>Signature PIN</b></li> <li>➤ Click <b>Create</b> (<b>New Amendment</b>) button</li> </ul>																						

Step	Action
4	<p>The <i>Document Information</i> page appears.</p>  <p>➤ Click <b>Create</b> (<i>Document</i>) button</p>
<p><b>Note:</b> The system automatically appends the original document number with a dash number (i.e. -1, -2, -3, etc.)</p>	

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5	<p>Click on <b>Document Status</b> in the <i>Document Toolbar</i> the <i>Status</i> page appears.</p> <p><b>Status for 8EKCS0008-1</b></p> <p> <b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> <p>For this Document you can:  <input type="button" value="Stamp"/> and Submit Document  <input type="button" value="Adjustments"/> Go To Adjustments  <input type="button" value="Back"/> <input type="button" value="Continue"/></p> <p>Status to Apply: <input type="text" value="SIGNED"/> <input type="button" value="v"/>  Signature PIN: <input type="text"/>  Reason: <input type="text" value="v"/>  Remarks: <input type="text"/></p> <p><b>Document Routing</b> <span style="float: right;">This is the routing path the current document will take once routed</span></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td>Erin Cobbs</td> <td>SIGNED</td> <td>0</td> </tr> </tbody> </table> <p><b>Document History</b> <span style="float: right;">This is the status history for this document</span></p> <table border="1"> <thead> <tr> <th>Date/Time</th> <th>Status</th> <th>Name</th> <th>Remarks</th> <th>Reason Desc</th> </tr> </thead> <tbody> <tr> <td>07/28/08 1:04PM</td> <td>CREATED</td> <td>Erin Cobbs</td> <td></td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>➤ Select <b>CANCELLED</b> from the <b>Status to Apply</b> drop-down list</li> <li>➤ Enter <b>Signature PIN</b></li> <li>➤ Enter <b>Remarks</b></li> <li>➤ Click <input type="button" value="Stamp"/> (<i>and Submit Document</i>) button</li> </ul> <p><b>Note:</b> The Production system will then do a funds availability check. This is the process where ITM 9.0 goes to CFS to de-obligate the funds.</p>	Name	Status	Level	Erin Cobbs	SIGNED	0	Date/Time	Status	Name	Remarks	Reason Desc	07/28/08 1:04PM	CREATED	Erin Cobbs																
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6	<p>If everything passes the funds check, the system will return to the <i>Home</i> page where the following message will appear.</p> <p><b>Home</b></p> <p> <b>Quick Tip</b> Welcome to Travel Manager. Click the "more" link in Last Documents to go to Open Document Page. Click the "more" link in Review Document to open Review Document Page. Click the Document icon to open the document. <a href="#">more</a></p> <table border="1"> <thead> <tr> <th colspan="5">Last Documents <a href="#">more</a></th> <th colspan="5">Documents to review <a href="#">more</a></th> </tr> <tr> <th>Type</th> <th>Traveler</th> <th>Document Name</th> <th>Dep Date</th> <th>In Use</th> <th>Type</th> <th>Traveler</th> <th>Document Name</th> <th>Dep Date</th> <th>In Use</th> </tr> </thead> <tbody> <tr> <td> TV</td> <td>990000006</td> <td>STRVS0000</td> <td>08/23/08</td> <td>*</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Messages:</p> <ul style="list-style-type: none"> <li>• Email has been sent to:erin.cobbs@noaa.gov</li> </ul>	Last Documents <a href="#">more</a>					Documents to review <a href="#">more</a>					Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use	TV	990000006	STRVS0000	08/23/08	*					
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7	<p>The person associated to the document will receive an email message:</p> <div data-bbox="289 348 1425 491" style="border: 1px solid #ccc; background-color: #f9f9f9; padding: 5px;"> <p><b>Subject: Travel Manager Correspondence</b>  <b>From:</b> <a href="mailto:Erin.Cobbs@noaa.gov">Erin.Cobbs@noaa.gov</a>  <b>Date:</b> 1:10 PM  <b>To:</b> <a href="mailto:Erin.Cobbs@noaa.gov">Erin.Cobbs@noaa.gov</a></p> </div> <p><a href="mailto:erin.cobbs@noaa.gov">erin.cobbs@noaa.gov</a></p> <p>You have a Travel Manager document that has been cancelled.</p>																																			
8	<p>If you click on <a href="#">Open/Copy Document</a> and click on your name, you should see a listing where the status shows CANCELLED.</p> <div style="display: flex; justify-content: space-between;"> <div data-bbox="298 982 786 1507" style="width: 48%;"> <p><b>Traveler Listing (Open/Copy Document)</b></p> <div data-bbox="298 1016 773 1108" style="background-color: #fce4ec; padding: 5px;"> <p><b>Quick Tip</b>  Type one or more letters of the traveler's last name and click Search. Then, click the traveler's name to list all documents.  <a href="#">Open/CopyDoc</a> <a href="#">DeleteDoc</a> <a href="#">AmendDoc</a></p> </div> <div data-bbox="298 1117 773 1213" style="background-color: #3f51b5; color: white; padding: 5px;"> <p><b>Enter Search Criteria</b></p> <p>Name (Last,First) <input type="text"/> <input type="button" value="Search"/></p> <p>Document Type <input type="text" value="ALL"/></p> </div> <div data-bbox="298 1222 773 1507" style="background-color: #3f51b5; color: white; padding: 5px;"> <p><b>Traveler List</b> <span style="float: right;">Click on an entry to select it</span></p> <p>Search Results <span style="float: right;"><a href="#">Prev 40</a> <a href="#">Next 40</a></span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">VNum</th> </tr> </thead> <tbody> <tr><td><a href="#">Barth, Brenda</a></td><td>0000-13422</td></tr> <tr><td><a href="#">Cobbs, Erin</a></td><td>0000-85085</td></tr> <tr><td><a href="#">Curtis, Cynthia</a></td><td>0000-00008</td></tr> <tr><td><a href="#">Germantown, Bill</a></td><td>9900-00021</td></tr> <tr><td><a href="#">Germantown, Brenda</a></td><td>9900-00010</td></tr> <tr><td><a href="#">Germantown, Erin</a></td><td>9900-00008</td></tr> <tr><td><a href="#">Germantown, Jean</a></td><td>9900-00006</td></tr> <tr><td><a href="#">Germantown, Louis</a></td><td>9900-00025</td></tr> <tr><td><a href="#">Help Desk, CBS</a></td><td>9000-00099</td></tr> </tbody> </table> </div> </div> <div data-bbox="824 982 1419 1159" style="width: 48%;"> <p><b>Document Search (Open/Copy Document)</b></p> <div data-bbox="824 1016 1419 1159" style="background-color: #3f51b5; color: white; padding: 5px;"> <p><b>Document List</b> <span style="float: right;">Click on an entry to select it</span></p> <p>Traveler: Erin Cobbs</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Type</th> <th style="text-align: left;">Document Name</th> <th style="text-align: left;">Dep Date</th> <th style="text-align: left;">Status</th> <th style="text-align: left;">In Use</th> </tr> </thead> <tbody> <tr> <td> TA</td> <td>8EKCS0008-1</td> <td>09/22/08</td> <td>CANCELLED</td> <td></td> </tr> <tr> <td> TA</td> <td>20080725a</td> <td>06/01/08</td> <td>ADJUSTED</td> <td></td> </tr> </tbody> </table> </div> </div> </div>	Name	VNum	<a href="#">Barth, Brenda</a>	0000-13422	<a href="#">Cobbs, Erin</a>	0000-85085	<a href="#">Curtis, Cynthia</a>	0000-00008	<a href="#">Germantown, Bill</a>	9900-00021	<a href="#">Germantown, Brenda</a>	9900-00010	<a href="#">Germantown, Erin</a>	9900-00008	<a href="#">Germantown, Jean</a>	9900-00006	<a href="#">Germantown, Louis</a>	9900-00025	<a href="#">Help Desk, CBS</a>	9000-00099	Type	Document Name	Dep Date	Status	In Use	TA	8EKCS0008-1	09/22/08	CANCELLED		TA	20080725a	06/01/08	ADJUSTED	
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