Exercise #5a: Blanket Travel Authorization

Objectives:

- Create a blanket travel authorization

Notes:

This exercise covers how to create an authorization for one quarter.

According to the NOAA Travel Handbook, section 301-2.1(j), a blanket travel authorization is issued to pre-approve multiple trips which cannot be scheduled in advance. Blanket travel authorizations should be limited to repetitive operational travel; should include a specific purpose that would apply to all trips made under the blanket travel authorizations; should be limited as to duration and places to be visited; and cannot be used for conferences, meetings, seminars, etc.

The NOAA Travel Handbook, section 301-2.5 requires a higher level of authorization for blanket travel authorizations.

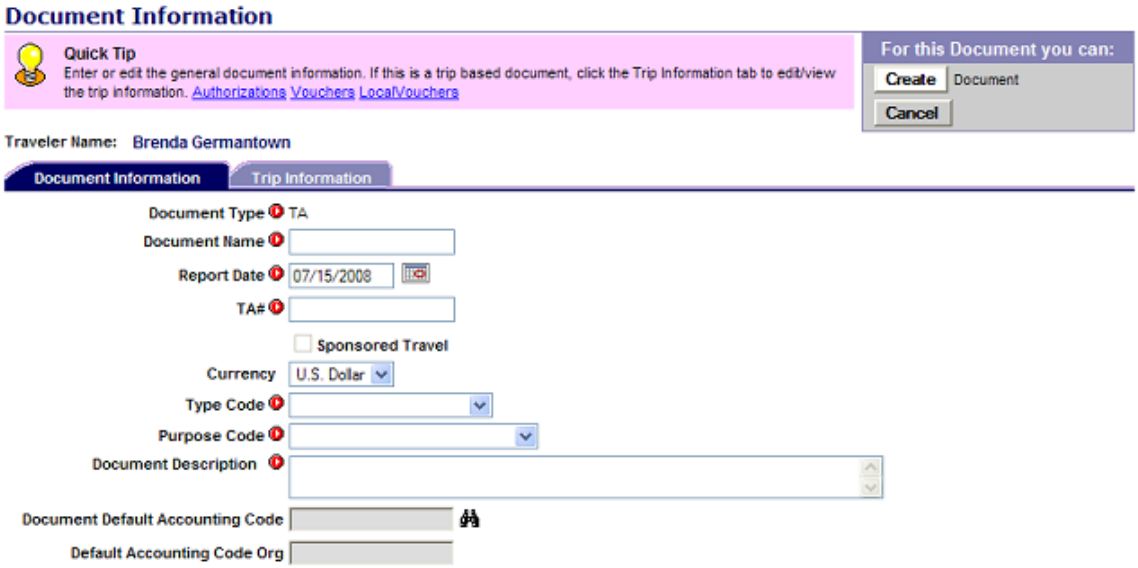
The NOAA Travel Handbook, section 301-2.16 states blanket authorizations are not used for obligating travel funds. Therefore all blanket travel authorizations are for zero ($0) dollar amounts only. Integrated Travel Manager edits will prevent users from vouchering against a blanket authorization.

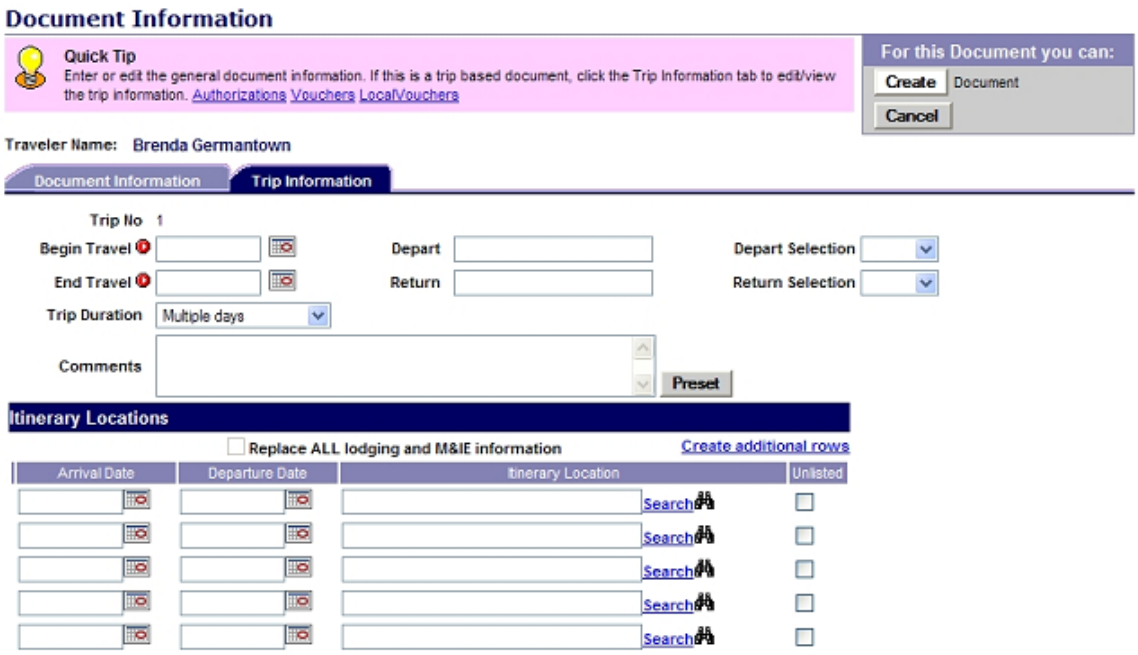
Trip authorizations are used to estimate the cost of each trip taken under a blanket authorization. Vouchers are prepared against the trip authorizations.

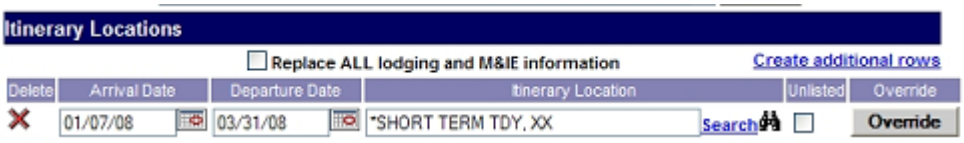
Instructions: Execute the following steps:

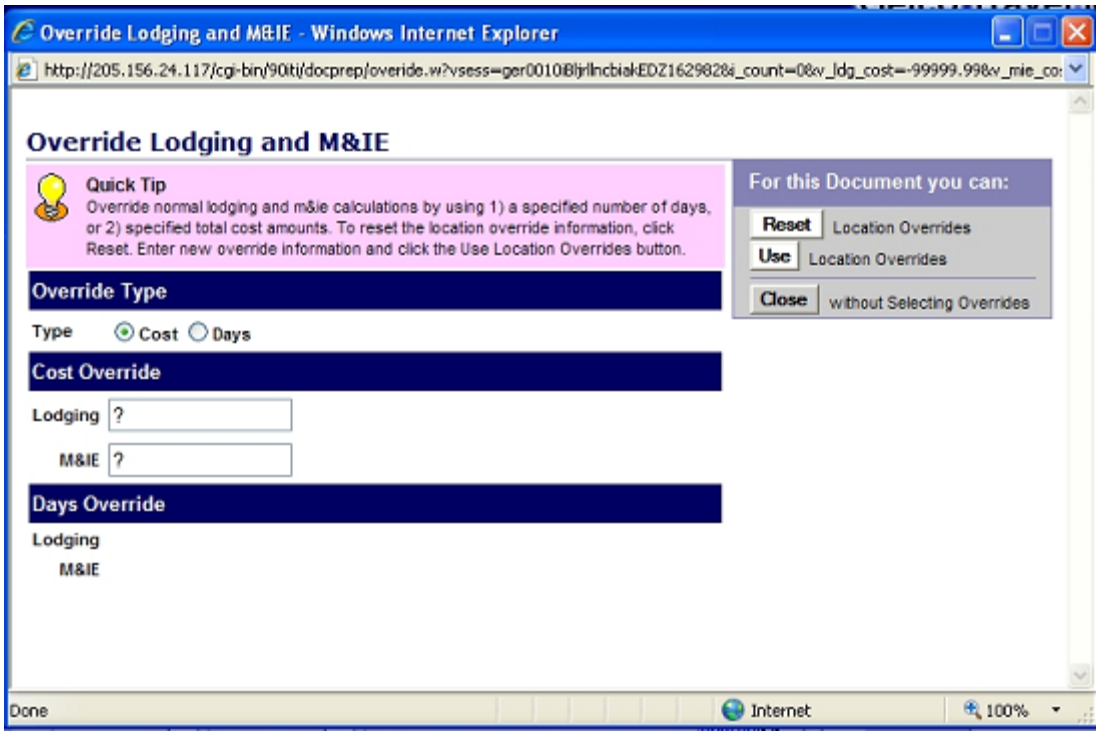
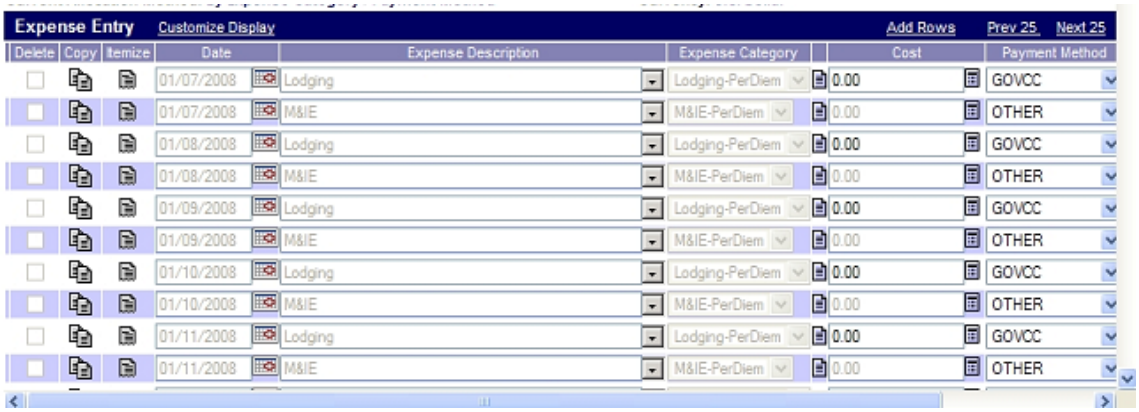
You have been asked to do site visits throughout Virginia in the second quarter of the current Fiscal Year (Jan 1-Mar 31)

Step	Action
1	From the ***Home*** page: ➢ Click Create New Document from the ***Document Toolbar***
2	The ***New Document Page*** appears. For a traveler, the information for the Vendor Number and Traveler name will automatically fill in. ➢ Click on the **Document Type** drop-down listing and select ***TA*** ➢ Click the Create *(this Document)* button

Step	Action
	Note: *For a group administrator, the last name of the traveler can be added and then click the Lookup icon. A new window would appear with the traveler's names and Vendor numbers. By clicking on the Vendor number, the traveler information would then be entered back on the New Document page.*
3	The ***Document Information*** page appears with the ***Document Information*** tab highlighted and fields displaying.  Enter the following information: ➢ **Document Name** = ***YFMLB0050*** ➢ **TA#** = ***YFMLB0050*** ➢ **Type Code** = ***1-BLANKET-DOMESTIC*** ➢ **Purpose Code** = ***9-OTHER (See Below)*** ➢ **Document Description** = ***Blanket Travel Authorization to various locations in Virginia during the 2nd quarter***

Step	Action
	Note: *For training purposes the Document Name & TA# fields equals the following information:* ***Y****=Current Fiscal Year (i.e., 8)* ***F****=Training First Name Initial* ***M****=Training Middle Name Initial* ***L****=Training Last Name Initial* ***S****=Single Domestic/****F****=Single Foreign/****L****=Local/****B****=Blanket* *####=4-digit sequential number* *NOAA Travel Regulations (NTR), sections 301-2.1(n)(p)(q) explains about the Production travel authorization numbers.*
3a	Click on the ***Trip Information*** tab.  Enter the following information in the top part of the screen: ➢ **Begin Travel** = ***01/01/08*** ➢ **Depart** = ***RES*** ➢ **End Travel** = ***03/31/08*** ➢ **Return** = ***RES***

Step	Action
3b	The values selected in the Begin & End Travel dates will automatically populate in the ***Itinerary Location*** area. The Arrival and Departure dates must be filled in prior to filling in the Itinerary Location. To enter the location: ➢ Type in the field the name or partial name and click **Search** This will bring up a drop-down listing of possible matches below the field. OR ➢ Click the **Lookup** icon This will open a new window that allows to search by country or state which will then based off that selection, populate another drop-down list for the cities for that selection. ➢ Select the one you want ***CONUS, *SHORT TERM TDY*** ➢ Click the Use *(Location)* button The field will then be populated with the selection.  ➢ Click the Override button

Step	Action
3c	The ***Override Lodging and M&IE*** page appears  ➢ Enter ***0 (zero)*** in the **Lodging** field ➢ Enter ***0 (zero)*** in the **M&IE** field ➢ Click Use *(Location Overrides)* button ➢ Click the Create *(Document)* button
4	Click on Expenses in the ***Document Toolbar*** to bring up the ***Edit/Enter Expenses*** page  ➢ Verify there are no expense costs listed ➢ Make changes where necessary

Step	Action
5	Click on Accounting in the ***Document Toolbar*** to open up the ***Available Accounting Code*** page. ➢ Verify the correct ACCS is assigned ➢ Make changes where necessary
6	Click on Totals in the ***Document Toolbar*** to open up the ***Total Details*** page ➢ Verify there are no expense costs listed
7	Click on Preview Document in the ***Document Toolbar*** to have a new window open with the print preview of your travel document.
8	Click on Document Status in the ***Document Toolbar*** to open up the ***Status*** page. The page will default with ***Signed*** in the **Status to Apply** field. ➢ Enter your ***Signature PIN*** ➢ Enter your ***Remarks*** ➢ Click the Stamp *(and Submit Document)* button The document will then be routed to the first level of the electronic approval process and you will be taken back to the ***Home*** page.
9	From the ***Home*** page click on the **Open Document** icon which will take you to the ***Open Document Signature*** page. ➢ Enter your ***Signature PIN*** ➢ Click the Sign *(to Review Document)* button The ***Document Summary*** page appears. ➢ Change the status to **Complete** ➢ Enter your ***Signature PIN*** ➢ Enter your ***Remarks*** ➢ Check the checkbox ***Stamp Without Adjustment*** ➢ Click the Stamp and Route button.
	Note: *For training purposes ONLY – the routing/approval/DATALINK process is not done. To be able to create a voucher from authorization, the status must be set to "Complete."*