## *Exercise #1: Logging into Travel Manager (Document Preparation)*

*Objectives:*

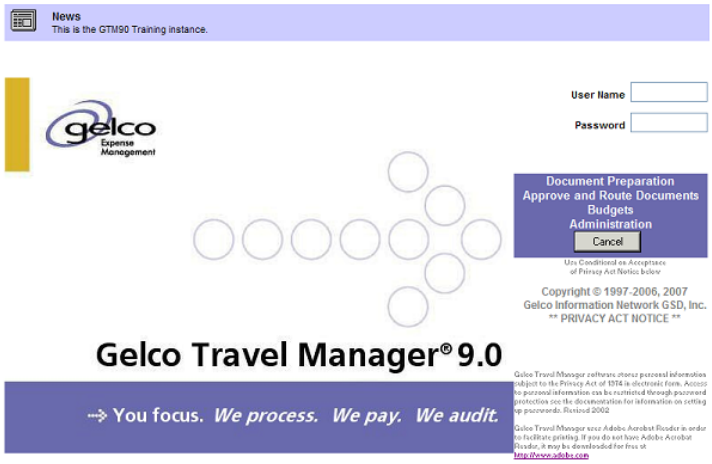
- Successfully login to Travel Manager

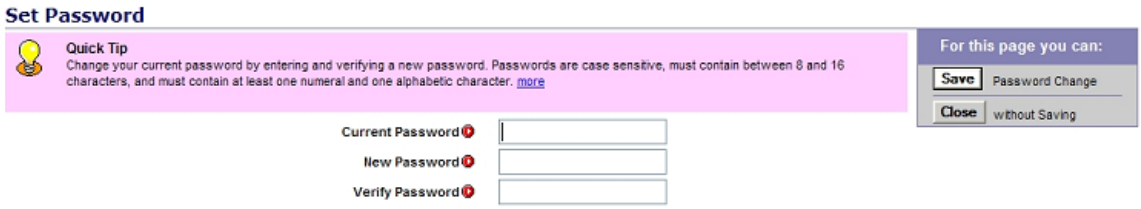
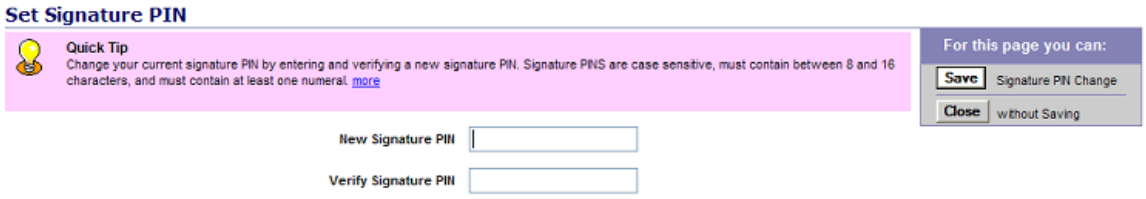
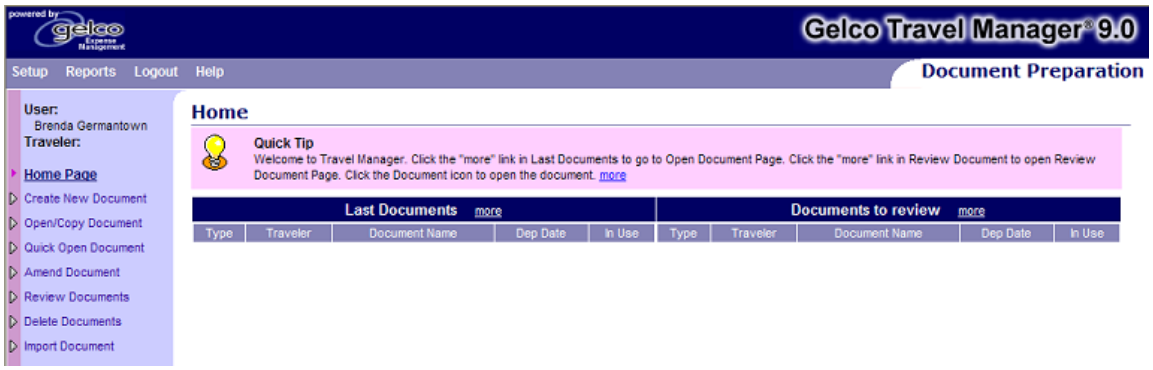
***Notes:*** *When logging into Travel Manager for the first time, the Travel Manager default password must be used. Contact NOAA Client Services Help Desk for the default password. Passwords and electronic signatures are case sensitive. Passwords must be changed every 60 days.*

Instructions: Execute the following steps:

All users require a user ID/password and an electronic signature in order to electronically stamp and/or route travel documents.

- **User IDs** consists of the first three characters of the last name and the last four numbers of the vendor number
- **Passwords** must be at least twelve characters long and include:
  - One Numeric Value
  - One Upper Case Value
  - One Lower Case Value
  - One Special Character Value
- **Electronic Signatures** must be at least eight characters long and include at least one numeric value

| Step | Action |
|---|---|
| 1a | Open a Internet Explorer window<br>Point your browser to: https://itmv9-training.rdc.noaa.gov/cgi-bin/90iti/docprep/login.w |
| 1b | If the Web Security Page appears, click **Continue** |
| 2 | ➢ Enter ***User Name*** and ***Password*** assigned for training purposes<br>➢ Click **Document Preparation**<br>  <br><br>***Note:*** *At the top of the login page is a NEWS feature. Please read and note any information as this is used to communicate key information to users.* |

| Step | Action |
|---|---|
| 3 | If prompted, "***New User – please enter a password now***," click OK |
| 4 | On the **Set Password** screen:<br><br>➢ In the ***Current Password*** field enter the ***Password*** assigned for training purposes<br>➢ In the ***New Password*** field enter the new ***Password*** assigned for training purposes<br>➢ In the ***Verify Password*** field enter the new ***Password*** assigned for training purposes<br>➢ Click Save Password Change<br><br>  |
| 5 | On the **Set Signature** screen:<br><br>➢ In the ***New Signature PIN*** field enter the ***Signature PIN*** assigned for training purposes<br>➢ In the ***Verify Signature PIN*** field enter the ***Signature PIN*** assigned for training purposes<br>➢ Click Save Signature PIN Change<br><br>  |
| 6 | The **Home** screen appears<br><br>  |

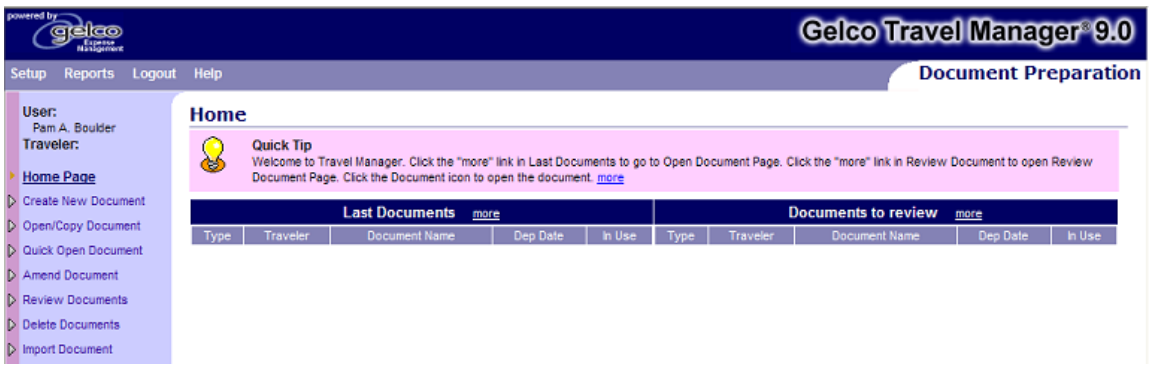
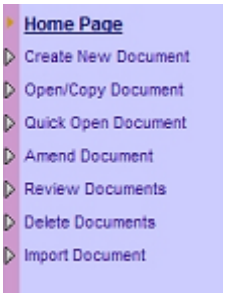
## *Exercise #1a: Navigation Basics*

*Objectives:*

- Understand the terminology used in Travel Manager
- Navigate in the system using the different menus

Instructions: Execute the following steps:

You have just logged into Travel Manager for the first time. Let's go over some basics so you will be able to navigate the system.

| Step | Action |
|---|---|
| 1 | Upon first logging in you will come to the ***Home*** screen.   |
| 1a | At the top of the ***Home*** screen are the Gelco Logos. |
| 1b | Underneath the logos on the right side is the "module" you are in, which happens to be Document Preparation. |
| 1c | On the same line as the module, but on the left is your **Menu Toolbar**. These options listed will change depending upon what screen you are on. |
| 1d | Down the left side of the screen is the **Document Toolbar**. These options listed will change if you are in a document OR depending upon what screen you are on.   |

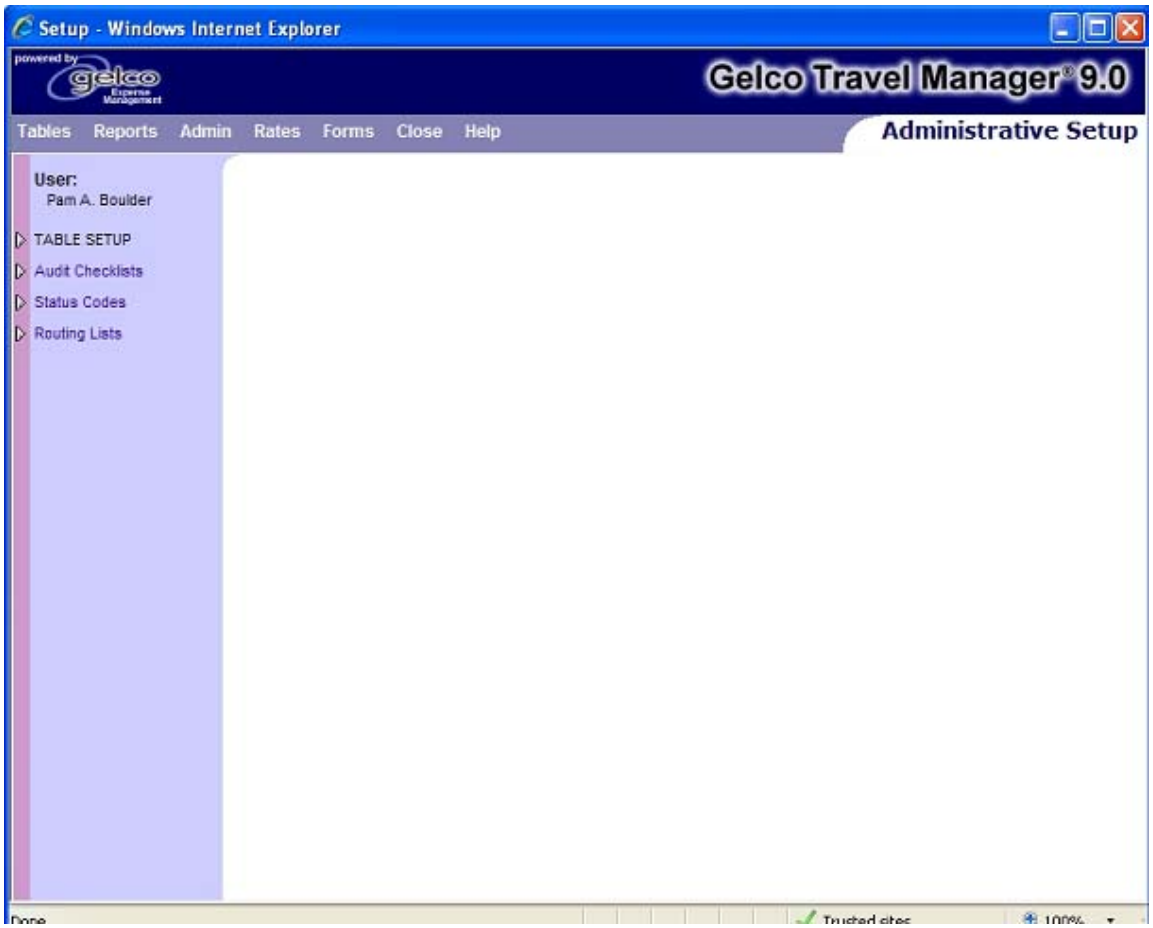
| Step | Action |
|---|---|
| 1e | In the upper left corner to the right of the Document Toolbar is the **Screen** name. In this case we are on the ***Home*** screen.<br><br>Home |
| 1f | Underneath the screen name are **Quick Tips**. Most of these are standard Travel Manager tips about the software; however, some of the tips are specific to NOAA.<br><br>**Quick Tip**<br>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. more |
| 1g | Underneath the quick tips are two sections. The left column is the **Last Documents**. This area will display the last five documents that you modified. If a document has been DATALINKED in the system, it will no longer appear here. By clicking the **More** link, it will take you to the ***Traveler Listing (Open/Copy Document)*** screen. Allowing you to search by a traveler and document type.<br><br>The right column is the **Documents to Review**. This area will display the five oldest documents in your review queue. By clicking the **More** link, it will take you to the ***Review Document*** screen, where it will list all documents awaiting review by you. It will also expand the information about the documents than what was shown on the ***Home*** screen.<br><br>**Last Documents** more<br>**Documents to review** more |

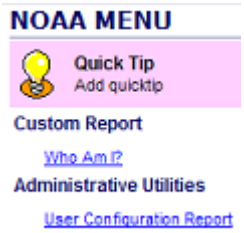
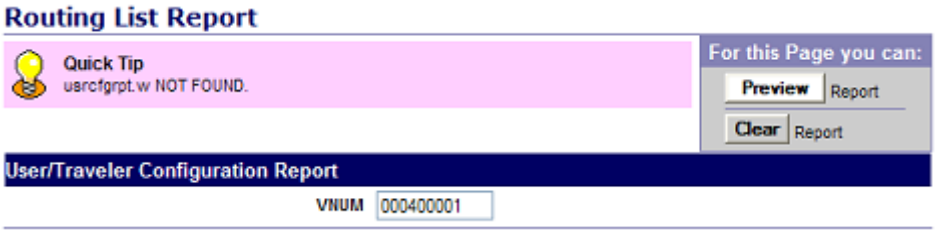
**Last Documents** more

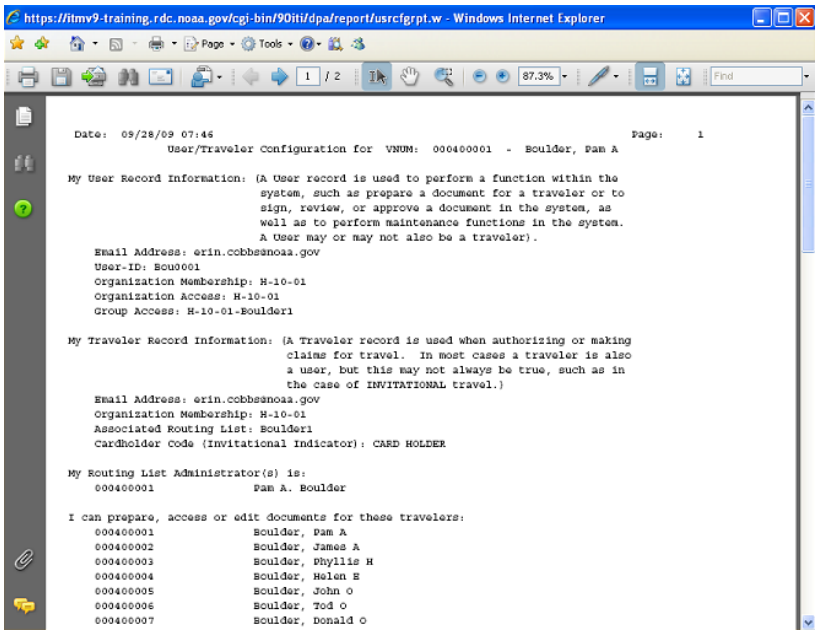
| Type | Traveler | Document Name | Dep Date | In Use |
|---|---|---|---|---|
| TA | 000065065 | 9EKCS0040 | 08/08/09 | |
| TA | 000000006 | 9ED3F0169 | 08/14/09 | |
| TV | 000065065 | 8EKCS0009 | 09/16/08 | * |
| TA | 000065065 | 9AAAS0032 | 10/02/09 | |
| TA | 000065065 | 8EKC0001 | 03/24/08 | |

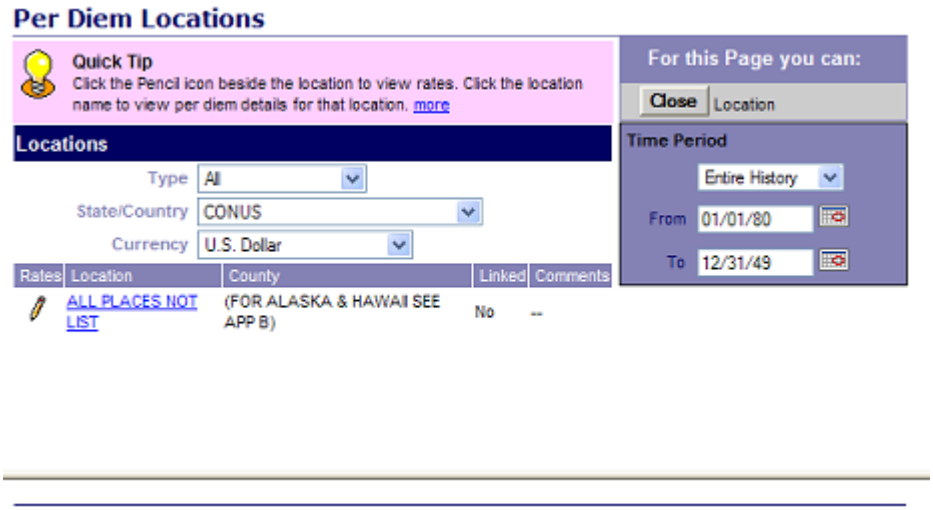
**Documents to review** more

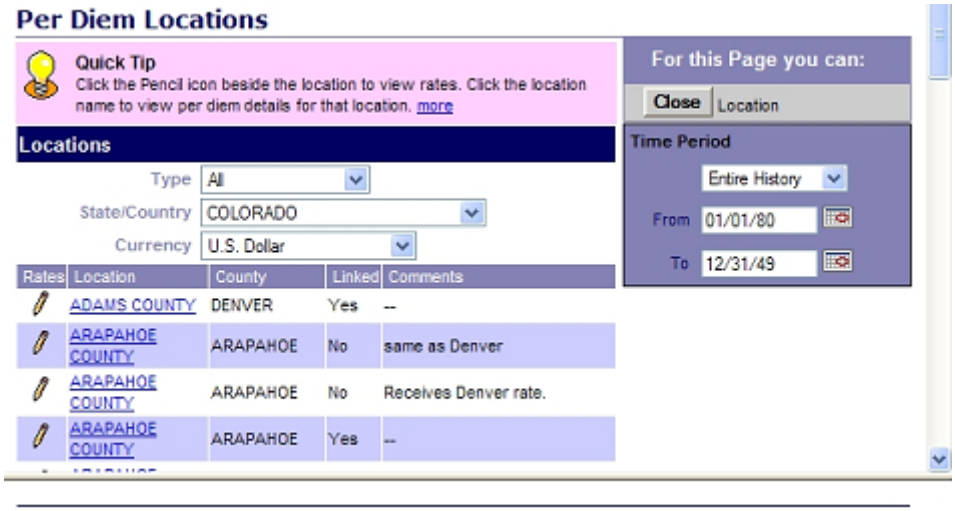
| Type | Traveler | Document Name | Dep Date | In Use |
|---|---|---|---|---|
| TA | 000065065 | 8EKRS0009-1 | 07/21/08 | |
| TA | 000065065 | 9AAAS0032 | 10/02/09 | |
| TV | 000065065 | 8EKCS0009 | 09/16/08 | * |
| TA | 000000006 | 9ED3F0169 | 08/14/09 | |

| Step | Action |
|---|---|
| 2 | From the Menu Toolbar click on **Setup**. A new window will open up for the module **Administrative Setup**.<br>  <br> |
| 3 | Click on **Reports** in the Menu Toolbar, the document toolbar options change.<br> <br> |

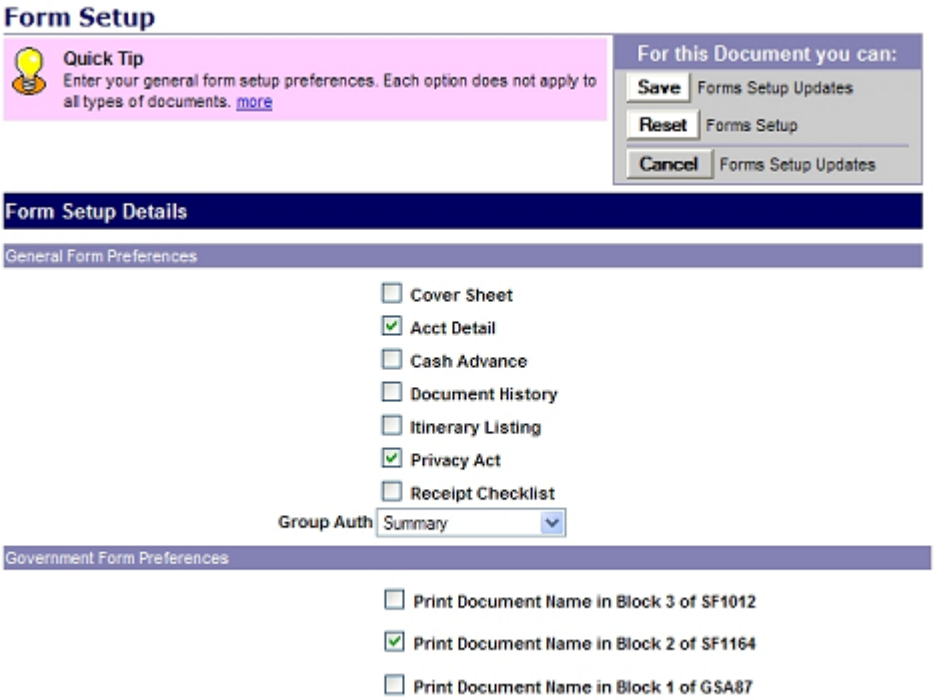
| Step | Action |
|---|---|
| 3a | Click on **Custom Reports** will bring up a screen listing a few different reports. The reports listed will depend on your role within the system.<br>  <br><br>The report which will help users is the ***User Configuration Report***. Clicking on that report link will bring up the following screen:<br>  <br><br>For any user, the VNUM field will populate with their vendor number. Only Routing Administrators have the capability to look up any users within their ITM organization. |

| Step | Action | |
|---|---|---|
| 3b | Clicking on the Preview Report button, will bring up a new window.<br>  <br>Date: 09/28/09 07:46 Page: 1<br>User/Traveler Configuration for VNUM: 000400001 - Boulder, Pam A<br>My User Record Information: (A User record is used to perform a function within the system, such as prepare a document for a traveler or to sign, review, or approve a document in the system, as well as to perform maintenance functions in the system. A User may or may not also be a traveler).<br>Email Address: erin.cobbs@noaa.gov<br>User-ID: Bou0001<br>Organization Membership: H-10-01<br>Organization Access: H-10-01<br>Group Access: H-10-01-Boulder1<br>My Traveler Record Information: (A Traveler record is used when authorizing or making claims for travel. In most cases a traveler is also a user, but this may not always be true, such as in the case of INVITATIONAL travel.)<br>Email Address: erin.cobbs@noaa.gov<br>Organization Membership: H-10-01<br>Associated Routing List: Boulder1<br>Cardholder Code (Invitational Indicator): CARD HOLDER<br>My Routing List Administrator(s) is:<br>000400001 Pam A. Boulder<br>I can prepare, access or edit documents for these travelers:<br>000400001 Boulder, Pam A<br>000400002 Boulder, James A<br>000400003 Boulder, Phyllis H<br>000400004 Boulder, Helen E<br>000400005 Boulder, John O<br>000400006 Boulder, Tod O<br>000400007 Boulder, Donald O<br>This report lists the basic information about the user. It includes:<br>• User Record Information<br>• Travel Record Information<br>• Routing List Administrator(s)<br>• If Group Administrator the individuals you can prepare documents for<br>• The other people that can access documents within the group<br>• Routing List information<br>• If Review/Approver, which routing lists you are listed on | |
| 4 | Click on **Admin** in the Menu Toolbar, the document toolbar options change. These options allow a user to change their password, reset their signature and remove edit locks.<br><br>It will also allow an approving official to delegate their approving authority, should they be out of the office and no backups have been designated in the routing list. | |

| Step | Action |
|---|---|
| 4a | When clicking on **Remove Edit Locks**, the following screen will appear:<br> <br><br>If you inadvertently closed out the document incorrectly or "edit locked" the document so no one else can edit it, the document will appear here. The only thing that needs to be done at that point is to click the Document Name to remove the edit lock. You can not remove an edit lock on a document that another user did. You would have to contact NOAA Client Services Help Desk to have them remove the edit lock. |
| 5 | Click on **Rates** in the Menu Toolbar, the document toolbar options change. These options allow a user to lookup per diem location rates without having to create a new document.<br> <br> |
| 5a | Clicking on **Per Diem Locations** brings up the following screen:<br>  <br><br>Users have the ability by using the drop-down listings to select the state/country in order to find the rates for the specific location. They also have the ability to the right to specify a specific time period. If nothing is put in the Time Period, the system will bring back all rates for that location. |

| Step | Action |
|---|---|
| 5b | Once a State/Country has been selected, a user will need to click or tab outside of that drop-down listing in order for the screen to refresh with all of the locations listed in the per diem tables.<br>  <br><br>This screen is a split screen, so the scrollbar will need to be utilized to scroll through the locations. The top part not only shows the location, but the county the location is in. |

| Step | Action |
|---|---|
| 5c | Click the ***View Rates*** icon in order to populate in the lower half of the screen the rates for that location.<br><br>BOULDER — BOULDER AND BROOMFIELD — No — --<br>BRECKENRIDGE — SUMMIT — No — --<br>BROOMFIELD — BOULDER AND BROOMFIELD — Yes — --<br>BUCKLEY AFB — DENVER — Yes — --<br><br>**Rates for BOULDER, COLORADO**<br>Lodging / M & IE / Eff Date / Expdate / Snl St / Snl End / Currency / Comment<br>105.00 / 54.00 / 10/01/08 / 12/31/49 / 01/01 / 12/31 / USD / --<br>98.00 / 54.00 / 10/01/07 / 09/30/08 / 01/01 / 12/31 / USD / --<br>93.00 / 54.00 / 10/01/06 / 09/30/07 / 01/01 / 12/31 / USD / --<br>90.00 / 54.00 / 10/01/05 / 09/30/06 / 01/01 / 12/31 / USD / --<br>87.00 / 47.00 / 10/01/04 / 09/30/05 / 01/01 / 12/31 / USD / --<br><br>If no dates were put in the Time Period section on the top part of the screen all rates starting with the most current will be listed. Users need to be aware of the Effective and Expiration Date fields. If there are multiple effective and expiration dates with the same information populated, it is a good indication that this means this location has seasonal rates:<br><br>**Rates for BOSTON, MASSACHUSETTS**<br>Lodging / M & IE / Eff Date / Expdate / Snl St / Snl End / Currency / Comment<br>203.00 / 64.00 / 10/01/08 / 12/31/49 / 11/01 / 08/31 / USD / --<br>256.00 / 64.00 / 10/01/08 / 12/31/49 / 10/01 / 10/31 / USD / --<br>256.00 / 64.00 / 10/01/08 / 12/31/49 / 09/01 / 09/30 / USD / -- |
| 6 | Click on **Forms** in the Menu Toolbar, the document toolbar options change. There are no real document toolbar options for this area.<br><br>FORM SETUP |

| Step | Action |
|---|---|
| 6a | This screen allows a user to choose what other things they wish to appear with their printed form.<br>  <br><br>Most of the ones checked are system defaults. You should not be making any changes to any that are system defaults. |
| 7 | To close out the setup, click the red “X” in the upper right hand corner or click Close on the Menu Toolbar. If clicking on the red “X”, please only click once. If the screen was maximized and you double-clicked, you would close out Travel Manager. |