

## Abbreviated Instructions for Routing Administration in ITM 9.0

| Step | Action   | Results  |
|------|--|--|
| 1a   | <ul style="list-style-type: none"> <li>➤ Open Internet Explorer</li> <li>➤ Go to the following URL:<br/><a href="https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w">https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w</a></li> </ul> | The <b>ITM 9.0 Login</b> screen appears  |
| 1b   | From the <b>ITM 9.0 Login</b> screen: <ul style="list-style-type: none"> <li>➤ Enter your <b>Username</b> &amp; <b>Password</b></li> </ul>   | <i><b>Note:</b> If you press ENTER after entering your Username and Password, the system will automatically go into the Document Preparation module. You will then need to log out of the system and try again or open a new window/tab.</i>   |
| 1c   | Click on <b>Administration</b>   | The system will take you to the <b>Administrative Setup</b> screen   |
| 2    | From the <b>Menu Toolbar</b> <ul style="list-style-type: none"> <li>➤ Click on <b>EPA</b></li> </ul>   | This will change the left menu options found on the <b>Navigation Tree</b>   |
| 3    | From the <b>Navigation Tree</b> <ul style="list-style-type: none"> <li>➤ Click on <b>Routing</b></li> <li>➤ Click on <b>Routing Lists</b></li> </ul>   | This will expand the options found under Routing on the <b>Navigation Tree</b> and after selecting routing list will open up the <b>Routing Lists</b> screen which is broken into two sections.  |
| 4    | Click on the <b>Add (Routing List)</b> button found in the upper right corner to create a new routing list   | The <b>Routing Details</b> area appears with blank fields.   |
| 5    | In the <b>Routing Details</b> area: <ul style="list-style-type: none"> <li>➤ Enter <b>Routing List Name</b></li> <li>➤ Enter <b>Organization</b></li> <li>➤ Click <b>Save</b></li> </ul>   | <i><b>Notes:</b><br/>           The routing list name can only be 8 characters long.<br/><br/>           The Organization can be typed in, copied/pasted, or the lookup icon can be utilized.<br/><br/>           The screen will refresh and show the newly added routing list at the top of the listing.</i> |
| 6    | From the <b>Navigation Tree</b> <ul style="list-style-type: none"> <li>➤ Click on <b>Signatures in Routing List</b></li> </ul>   | The <b>Signatures in Routing List</b> screen appears   |

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| 6a   | <p>In the <b>Search Criteria</b> area:</p> <ul style="list-style-type: none"> <li>➤ Enter <b>Routing List Name</b></li> <li>➤ Click <b>Search</b></li> </ul> <p>Any list(s) that has the criteria entered will appear below.</p> <ul style="list-style-type: none"> <li>➤ Click on the <b>Routing List Name</b></li> </ul>   | The <b>Signatures in Routing List (NAME)</b> screen appears   |
| 7    | Click the <b>Add (Signature)</b> button in the upper right corner to add the reviewer(s)/approver(s) to the routing list   | The <b>Signatures Details</b> screen appears  |
| 7a   | <p>Fill out following fields:</p> <ul style="list-style-type: none"> <li>➤ <b>Document Type</b></li> <li>➤ <b>Signature Name</b></li> <li>➤ <b>Status</b></li> <li>➤ <b>Process Name</b></li> <li>➤ <b>Level</b></li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>➤ We suggest using ALL, unless different people will be reviewing different <b>DOCUMENT TYPES</b>.</li> <li>➤ If you use one <b>DOCUMENT TYPE (TA)</b>, you must use them all (TA, TV, RELCAIM, LV)</li> <li>➤ A Routing Administrator is not limited to just their ITM Org Code in order to add <b>SIGNATURES</b> to the list.</li> <li>➤ A Routing Administrator can search using Organization, First Name, Vendor Number or a combination of the three to look up someone's <b>SIGNATURE</b>.</li> <li>➤ Only use the three <b>STATUSES</b> listed to the right.</li> <li>➤ If you use <b>PROCESS NAME</b>, you must use all three. (NONDELEGATED, DELEGATED, REDELEGATED)</li> <li>➤ NTO FOREIGN is ONLY for the NOAA Travel Office</li> <li>➤ The default <b>LEVEL</b> is zero (0). Zero should NEVER be used in your routing list. The lowest level should always be one (1).</li> <li>➤ There is no limit to the number of levels to a routing list.</li> </ul> | <p><u>Document Type:</u><br/>ALL<br/>LV<br/>RECLAIM<br/>TA<br/>TV</p> <p><u>Status:</u><br/>APPROVED<br/>REVIEWED<br/>PROCESSED</p> <p><u>Process Name:</u><br/>DOC NONDELEGATED<br/>DOC DELEGATED<br/>DOC REDELEGATED<br/>NTO FOREIGN<br/>"BLANK"</p> <p><u>Level:</u><br/>1-?</p> |

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| 7b   | Once all fields have been entered, click <b>Save (Signature Updates)</b> button   | The <b>Signatures in Routing List (NAME)</b> screen appears with the new information added.   |
| 8    | Repeat the steps <b>7 through 7b</b> to add all of the reviewers/approvers to the routing list.   |   |
| 9    | To add travelers to the routing list, click on <b>Maintain (Travelers)</b> button.  | The <b>Add Travelers to Routing List (NAME)</b> screen appears.   |
| 10   | <p>Select the person to be associated to this list:</p> <ul style="list-style-type: none"> <li>➤ Check the checkbox next to the name of the traveler</li> <li>➤ Click <b>Add (Travelers)</b> button</li> </ul> <p>Repeat to add all travelers to the Routing List</p> | <p>The screen will refresh showing the specific routing list assignment for those selected travelers.</p> <p><b>Notes:</b><br/> <i>All travelers will be listed. This includes employees, invitational travelers, bargaining unit employees, and reviewers/approvers in the same ITM Organization Code.</i></p> <p><b><u>DO NOT</u></b> select any invitational or NWSEO (NWS) bargaining unit employee.</p> <p><i>Verify the person does not already have a Routing List associated to them in the far right column. If they do, contact the Routing Administrator of that list to find out why the traveler is associated to their list and if they can be moved.</i></p> <p><i>Reviewers/Approvers, within the same ITM Org Code, associated to the Routing List will not have a checkbox next to their name. This is because they are not to review/approve their own documents.</i></p> <p><i>Only forty (40) individuals will be shown per screen. Use the search capability to look up a traveler by Last Name or Vendor Number.</i></p> |
| 11   | <p>When finished:</p> <ul style="list-style-type: none"> <li>➤ Click <b>Logout</b> in the <i>Menu Toolbar</i>.</li> </ul>   |   |