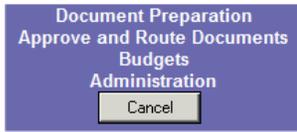
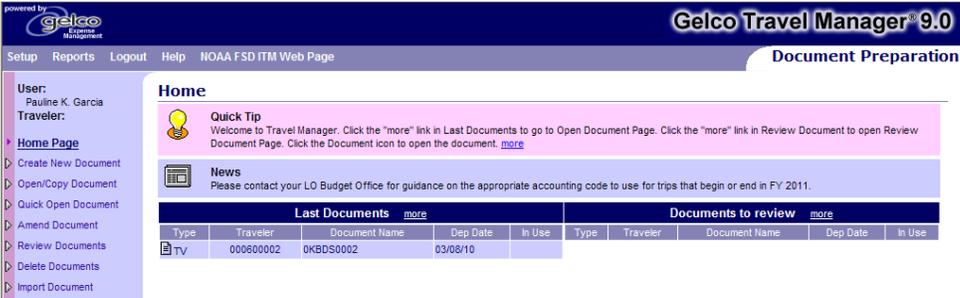
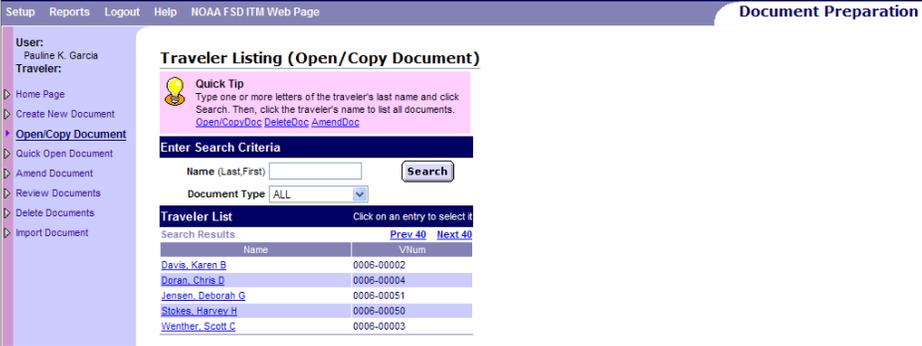


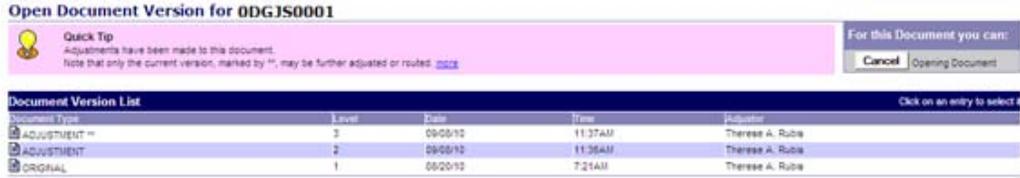
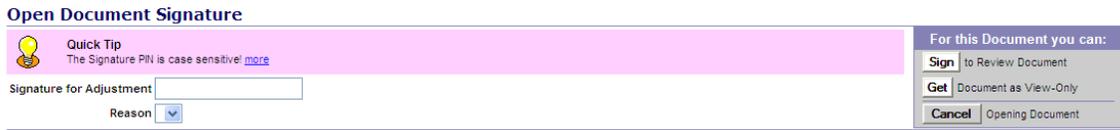
Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
1a	<ul style="list-style-type: none"> ➤ Open Internet Explorer ➤ Go to the following URL: https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w
1b	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;"> <ul style="list-style-type: none"> ➤ Enter your Username & Password on the Login Page </div> <div style="flex: 2;">  </div> </div>
1c	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;"> <ul style="list-style-type: none"> ➤ Click on Document Preparation </div> <div style="flex: 2;">  </div> </div> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p>Note:</p> <ul style="list-style-type: none"> ✓ If you press ENTER after entering your Username and Password, the system will automatically go into the Document Preparation module. ✓ If this is the first time logging into the system, you may be prompted to change your Password and/or enter a Signature Pin. ✓ NOAA does not use the Approve and Route Documents module in ITM. All approvals are done from the Document Preparation module. </div>
2	<p>The Home screen appears.</p> 

Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Up to five (5) documents will show in the Review area on the Home screen.</i> ✓ <i>The oldest documents will appear first.</i> ✓ <i>Excepted Traveler documents will not route electronically.</i>
3a	<p>From the Home screen:</p> <ul style="list-style-type: none"> ➤ Click on Open/Copy Document link in the <i>Document Toolbar</i>
3b	<p>The Traveler Listing (Open/Copy Document) screen appears</p>  <p>➤ Click on the traveler's name in the listing</p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Approvers must be assigned to the group in their profile in order to view the excepted traveler's document. If not assigned, they will only see their name in the listing, if they have travel documents.</i> ✓ <i>The traveler listing will only list those travelers in the group that have travel documents.</i> ✓ <i>Searches can be done by traveler's last name and document type.</i>

Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
3c	<p>The traveler's documents will appear on the right side of the screen.</p>  <p>The screenshot shows the 'Document Preparation' interface. On the left is a navigation menu with options like 'Home Page', 'Create New Document', 'Open/Copy Document', 'Quick Open Document', 'Amend Document', 'Review Documents', 'Delete Documents', and 'Import Document'. The main area is split into two panels. The left panel, 'Traveler Listing (Open/Copy Document)', includes a 'Quick Tip' about searching by last name, a search criteria form with fields for 'Name (Last,First)', 'Document Type' (set to 'ALL'), and a 'Search' button. Below is a 'Traveler List' table with columns for Name and VNum, listing travelers like Davis, Karen B; Doran, Chris D; Jensen, Deborah G; Stokes, Harvey H; and Wenther, Scott C. The right panel, 'Document Search (Open/Copy Document)', shows a 'Document List' for traveler Deborah Jensen with a table containing columns for Type, Document Name, Dep Date, Status, and In Use. A document with Type 'TA' and Document Name '0DGJS0001' is listed with a status of 'SIGNED' and a departure date of '01/25/10'. An open document icon is visible next to this entry.</p> <p>➤ Click on the open document icon () of the document you wish to approve</p>
4a	<p>If there have been revisions to the travel document, the Open Document Version screen appears.</p> <p>➤ Click on the most recent adjustment/amendment found at the top using the open document icon (). The most recent version will also have a double asterisk beside it.</p>  <p>The screenshot shows the 'Open Document Version for 0DGJS0001' screen. It features a 'Quick Tip' stating that adjustments have been made and only the current version (marked with **) can be further adjusted. Below is a 'Document Version List' table with columns for Document Type, Level, Date, Time, and Adjuster. The table shows three entries: 'ADJUSTMENT **' (Level 3, Date 09/09/10, Time 11:37AM, Adjuster Therese A. Rubie), 'ADJUSTMENT' (Level 2, Date 09/09/10, Time 11:36AM, Adjuster Therese A. Rubie), and 'ORIGINAL' (Level 1, Date 09/09/10, Time 7:21AM, Adjuster Therese A. Rubie). The most recent adjustment is marked with double asterisks.</p> <p>➤ Go to Step 4b</p>
4b	<p>If there have been no revisions to the travel document or after clicking on the most recent adjustment/amendment the Open Document Signature screen appears.</p>  <p>The screenshot shows the 'Open Document Signature' screen. It includes a 'Quick Tip' stating that the Signature PIN is case sensitive. There is a text input field for 'Signature for Adjustment' and a dropdown menu for 'Reason'. On the right side, there are buttons for 'Sign (to Review Document)', 'Get Document as View-Only', and 'Cancel Opening Document'.</p> <p>➤ Enter Signature PIN</p> <p>➤ Click Sign (to Review Document) button</p>

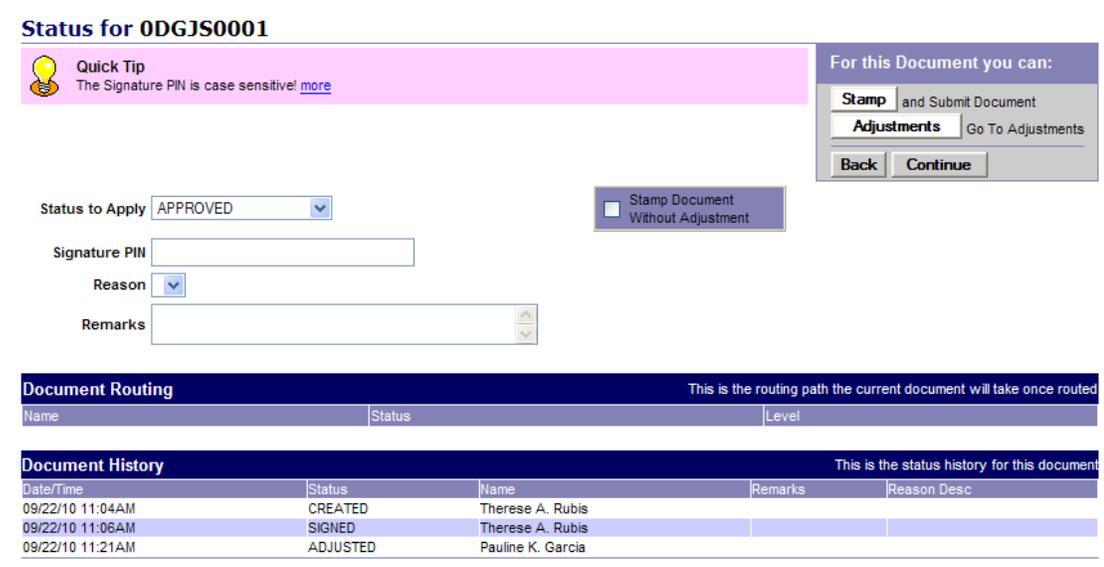
Approving Excepted Travelers' Documents in ITM 9.0

Step	Action																										
	<p>Notes:</p> <p>✓ To open a document in View Only mode, do not enter your Signature PIN, and click the Get (Document as View Only) button.</p>																										
5	<p>The Document Summary screen appears</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>Document Summary for Adjustment to Travel Authorization ODGJS0001</p> <div style="display: flex; justify-content: space-between;"> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p>Quick Tip For specific information, click on a Details link. You can sign and stamp your document from the Document Status section. more</p> </div> <div style="border: 1px solid #ccc; padding: 5px; background-color: #e0e0e0;"> <p>For this Document you can:</p> <p>▶ Print ▶ Settings</p> <p>▶ Sign this document</p> <hr/> <p>Save Document</p> <hr/> <p>Undo Adjustment</p> <hr/> <p>Continue Entering Document</p> <hr/> <p>Close Current Document</p> </div> </div> <div style="margin-top: 10px;"> <p>Document Status Current Status: ADJUSTED Awaiting: for Status:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Status To Apply</th> <th>Signature PIN</th> <th>Remarks</th> </tr> <tr> <td>APPROVED ▼</td> <td><input type="text"/></td> <td><div style="border: 1px solid #ccc; height: 40px;"></div></td> </tr> </table> <p style="text-align: center;"><input type="checkbox"/> Stamp Without Adjustment</p> <p>Reason ▼</p> <p style="text-align: center;">Stamp and Route</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">Traveler Details</th> <td>Traveler ID: 000600051</td> <td>Traveler Name: Deborah Jensen</td> <td>Organization: H-20-01</td> </tr> <tr> <th colspan="2">Document Information</th> <td>TA#: 0DGJS0001</td> <td>Currency: U.S. Dollar</td> <td>Type: 1-SINGLE-DOMESTIC</td> </tr> <tr> <th>Purpose</th> <th>Location</th> <th>From</th> <th>To</th> <th>Per Diem Rates</th> </tr> <tr> <td>1-SITE VISIT</td> <td>DALLAS, TX</td> <td>01/25/10</td> <td>01/29/10</td> <td>122.00 / 71.00 (01/01/10-03/31/10)</td> </tr> </table> </div> </div>	Status To Apply	Signature PIN	Remarks	APPROVED ▼	<input type="text"/>	<div style="border: 1px solid #ccc; height: 40px;"></div>	Traveler Details		Traveler ID: 000600051	Traveler Name: Deborah Jensen	Organization: H-20-01	Document Information		TA#: 0DGJS0001	Currency: U.S. Dollar	Type: 1-SINGLE-DOMESTIC	Purpose	Location	From	To	Per Diem Rates	1-SITE VISIT	DALLAS, TX	01/25/10	01/29/10	122.00 / 71.00 (01/01/10-03/31/10)
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Purpose	Location	From	To	Per Diem Rates																							
1-SITE VISIT	DALLAS, TX	01/25/10	01/29/10	122.00 / 71.00 (01/01/10-03/31/10)																							
	<p>Notes:</p> <p>✓ To back out of an adjustment without taking any action (ie: making changes or applying a signature stamp), you MUST click the Undo (Adjustment) button in the upper right hand corner. Simply closing the document will still create an adjustment status, even if no action was taken.</p>																										
5a	<p>The travel document can be reviewed from this screen. If more details are needed, like accounting string, the heading of each section may be clicked to go to that specific area or an option listed on the left in the <i>Document Toolbar</i>.</p>																										
6	<p>Once the document has been reviewed and is ready to be stamped it can be done one of two ways. From the Document Summary screen follow step 6a. From the Document Status screen follow step 6b.</p>																										

Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
6a	<p>From the Document Summary screen do the following:</p> <ul style="list-style-type: none"> ➤ Make sure the status to apply says APPROVED ➤ Type in your Signature PIN ➤ Enter Remarks (if any) ➤ Check the checkbox (if no adjustments have been made to the document – see note below) ➤ Click on the Stamp and Route button ➤ Go to Step 7 <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The Stamp and Route button is toward the bottom of the Document Status section.</i> ✓ <i>If you type your Signature PIN and press ENTER that will only save the adjustment not stamp the document.</i> ✓ <i>Not checking the checkbox will leave the adjusted status in the history of the document even though there wasn't an adjustment.</i> ✓ <i>Approvers have the ability to make changes to a document, however, the original preparer will not be automatically notified of any changes made. Therefore, it is suggested that Approvers return documents to the preparer to make any necessary changes, so that one person is in control of the document from start to finish. To do so, a Reviewer or Approver may change the status to RETURNED, if a change needs to be made. If that is done, REMARKS need to be entered stating what changes need to take place on the document.</i>
6b	<p>To stamp a document from the Document Summary screen do the following:</p> <p>Click on the Document Status link from either the header section in the Document Summary or from the <i>Menu Toolbar</i></p> <div style="margin-top: 10px;"> </div>

Approving Excepted Travelers' Documents in ITM 9.0

Step	Action																										
6b1	<p>The Document Status screen appears.</p>  <p>Status for 0DGJS0001</p> <p>Quick Tip The Signature PIN is case sensitive! more</p> <p>For this Document you can: Stamp and Submit Document Adjustments Go To Adjustments Back Continue</p> <p>Status to Apply: APPROVED <input type="checkbox"/> Stamp Document Without Adjustment</p> <p>Signature PIN: <input type="text"/></p> <p>Reason: <input type="text"/></p> <p>Remarks: <input type="text"/></p> <p>Document Routing This is the routing path the current document will take once routed</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Status</th> <th>Level</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>Document History This is the status history for this document</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>09/22/10 11:04AM</td> <td>CREATED</td> <td>Therese A. Rubis</td> <td> </td> <td> </td> </tr> <tr> <td>09/22/10 11:06AM</td> <td>SIGNED</td> <td>Therese A. Rubis</td> <td> </td> <td> </td> </tr> <tr> <td>09/22/10 11:21AM</td> <td>ADJUSTED</td> <td>Pauline K. Garcia</td> <td> </td> <td> </td> </tr> </tbody> </table> <ul style="list-style-type: none"> ➤ Make sure the status to apply says APPROVED ➤ Type in your Signature PIN ➤ Enter Remarks (if any) ➤ Check the checkbox (if no adjustments have been made to the document – see note below) ➤ Click the Stamp (and Submit Document) button <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The Document Status screen will show the Document Routing associated to the document as well as the Document History.</i> ✓ <i>Not checking the checkbox will leave the adjusted status in the history of the document even though there wasn't an adjustment.</i> ✓ <i>Approvers have the ability to make changes to a document, however, the original preparer will not be automatically notified of any changes made. Therefore, it is suggested that Approvers return documents to the preparer to make any necessary changes, so that one person is in control of the document from start to finish. To do so, a Reviewer or Approver may change the status to RETURNED, if a change needs to be made. If that is done, REMARKS need to be entered stating what changes need to take place on the document.</i> 	Name	Status	Level				Date/Time	Status	Name	Remarks	Reason Desc	09/22/10 11:04AM	CREATED	Therese A. Rubis			09/22/10 11:06AM	SIGNED	Therese A. Rubis			09/22/10 11:21AM	ADJUSTED	Pauline K. Garcia		
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Approving Excepted Travelers' Documents in ITM 9.0

Step	Action																																								
7	<p>The Pre-Audit Results screen appears</p> <div style="border: 1px solid black; padding: 5px;"> <p>Pre-Audit Results for ODGJS0001</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p> Quick Tip Click the Magnifying Glass icon to view detail comments for each audit process. more</p> <p>Document Name: ODGJS0001 Type: TA Traveler: Jensen, Deborah Status: PASS</p> </div> <div style="width: 35%; border: 1px solid gray; padding: 2px;"> <p>For this Document you can:</p> <p>Continue Stamping the Document Cancel Pre-Audit Results</p> </div> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr style="background-color: #002060; color: white;"> <th colspan="3">Pre-Audit Results</th> </tr> <tr style="background-color: #4a69bd; color: white;"> <th style="width: 60%;">Audit Process</th> <th style="width: 20%;">Status</th> <th style="width: 20%;">Comments</th> </tr> </thead> <tbody> <tr><td> ACCOUNT VALIDATION</td><td>PASS</td><td></td></tr> <tr><td> AMENDMENTS</td><td>PASS</td><td></td></tr> <tr><td> AMOUNT PAID TO TRAVELER</td><td>PASS</td><td></td></tr> <tr><td> APPROVAL BY TRAVELER</td><td>PASS</td><td></td></tr> <tr><td> DOC CONFERENCE VALIDATION</td><td>PASS</td><td></td></tr> <tr><td> DOC FY END PROCESSING</td><td>PASS</td><td></td></tr> <tr><td> DOC MILEAGE VALIDATION</td><td>PASS</td><td></td></tr> <tr><td> DOC PRIOR YEAR PROCESSING</td><td>PASS</td><td></td></tr> <tr><td> UNIQUE TA NUMBER</td><td>PASS</td><td></td></tr> <tr><td> VALIDATE VNUM</td><td>PASS</td><td></td></tr> </tbody> </table> <p style="margin-top: 10px;">➤ If the document status has PASS, click Continue (<i>Stamping the Document</i>) button ➤ If the document status has FAILED, click Cancel (<i>Pre-Audit Results</i>). Fix the error, re-stamp the document.</p> </div>	Pre-Audit Results			Audit Process	Status	Comments	ACCOUNT VALIDATION	PASS		AMENDMENTS	PASS		AMOUNT PAID TO TRAVELER	PASS		APPROVAL BY TRAVELER	PASS		DOC CONFERENCE VALIDATION	PASS		DOC FY END PROCESSING	PASS		DOC MILEAGE VALIDATION	PASS		DOC PRIOR YEAR PROCESSING	PASS		UNIQUE TA NUMBER	PASS		VALIDATE VNUM	PASS					
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8	A blank screen may appear while Travel Manager is sending information to the Core Financial System (CFS). Please DO NOT close the browser. Wait until the Home screen appears.																																								
9	<p>Approvers will see the following on their Home screen:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Home</p> <div style="background-color: #fce4ec; padding: 5px; margin-bottom: 5px;"> <p> Quick Tip 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</p> </div> <div style="background-color: #e1bee7; padding: 5px; margin-bottom: 5px;"> <p> News Please contact your LO Budget Office for guidance on the appropriate accounting code to use for trips that begin or end in FY 2011.</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <thead> <tr style="background-color: #002060; color: white;"> <th colspan="5">Last Documents more</th> <th colspan="5">Documents to review more</th> </tr> <tr style="background-color: #4a69bd; color: white;"> <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></td> <td>00960051</td> <td>ODGJS0001</td> <td>01/25/10</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td>00960002</td> <td>OKBDS0002</td> <td>03/05/10</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"> Email has been sent to therese.rubis@test.noaa.gov <p style="font-size: small; margin-top: 10px;">CBA OBLIGATION #00191674 Organization ID:142002 TRAVELER PO#00191673</p> </div>	Last Documents more					Documents to review more					Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use		00960051	ODGJS0001	01/25/10								00960002	OKBDS0002	03/05/10						
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10	Another document may be APPROVED or Travel Manager may be closed out by clicking on the Logout link in the <i>Menu Toolbar</i> .																																								