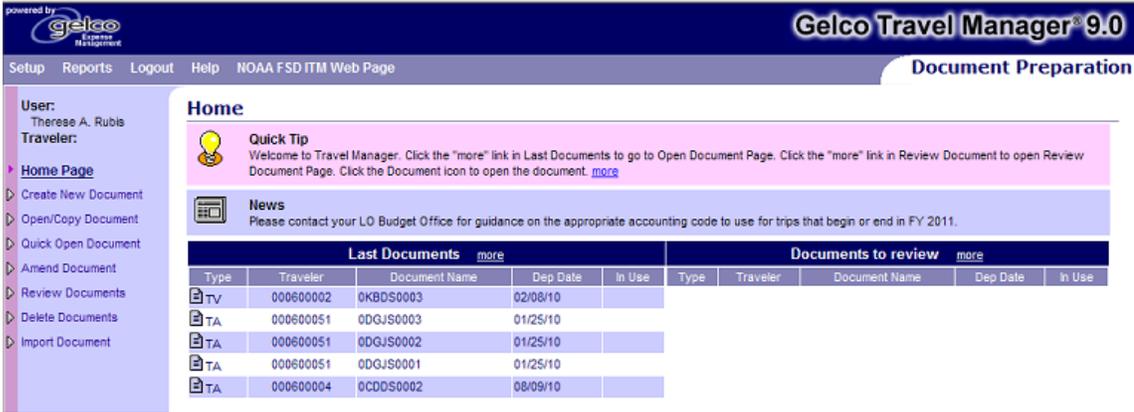


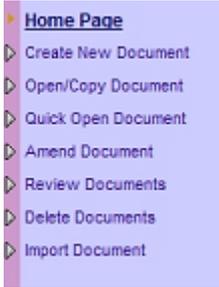
Exercise #1a: Navigation Basics

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

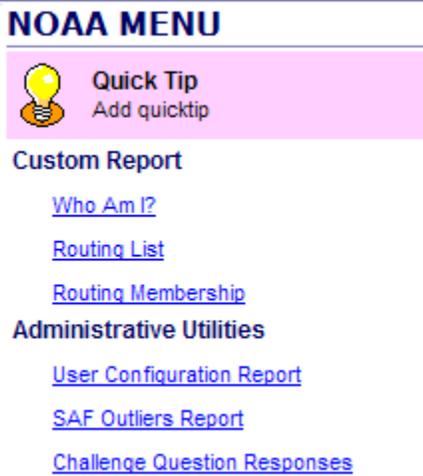
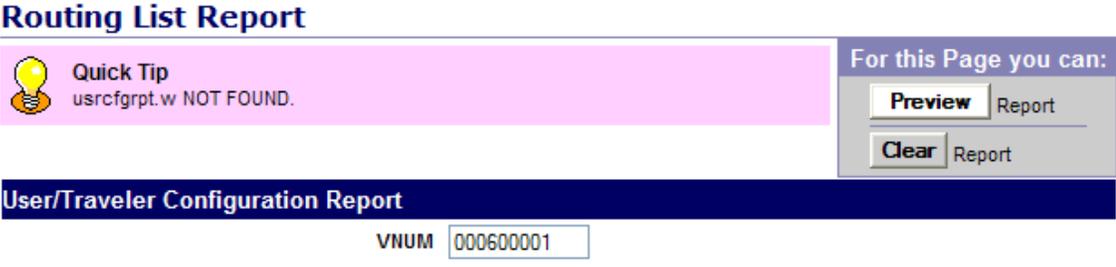
Instructions: Execute the following steps:

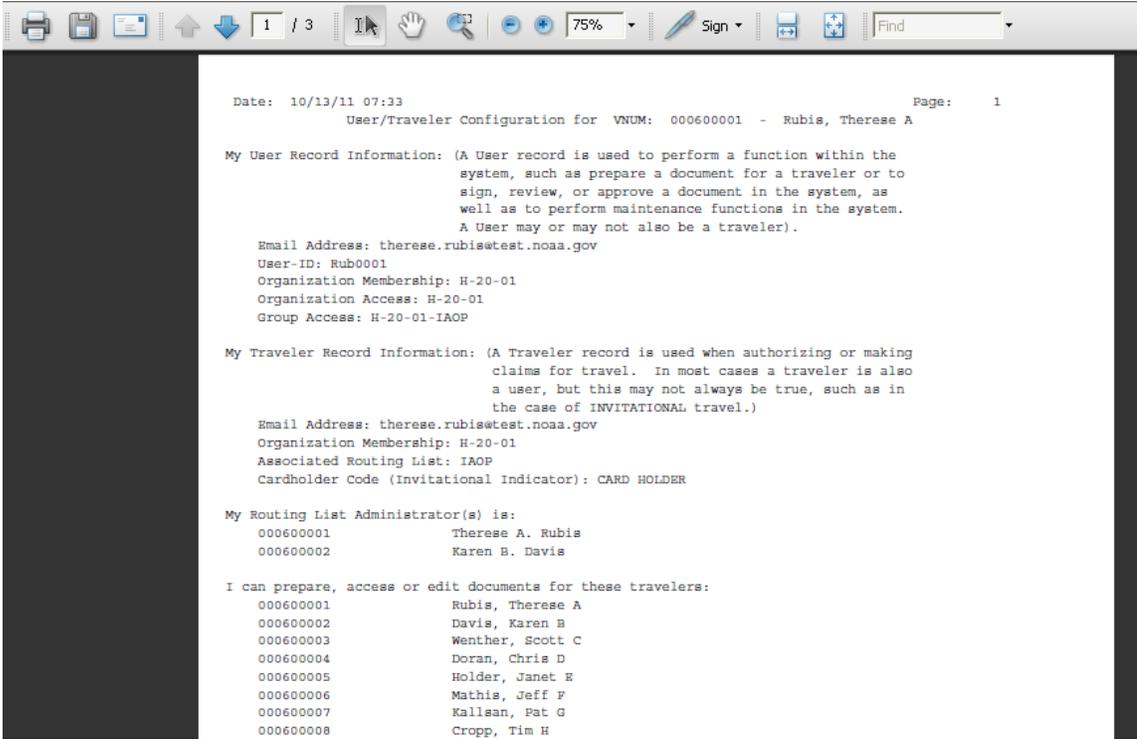
You have just logged into Travel Manager for the first time. Let’s go over some basics so you will be able to navigate the system.

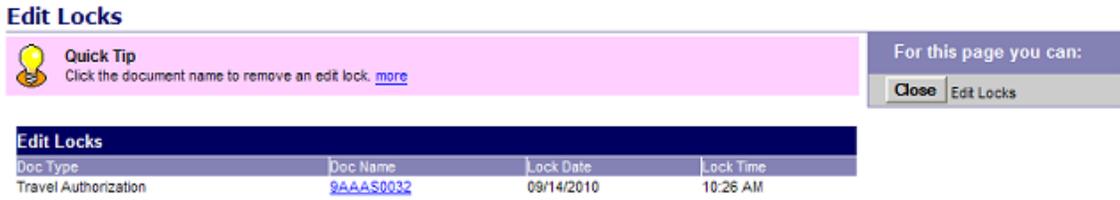
Step	Action
1	<p>Upon first logging in you will come to the <i>Home</i> screen.</p> 
1a	<p>At the top of the <i>Home</i> screen are the Gelco Logos.</p> 
1b	<p>Underneath the logos on the right side is the “module” you are in, which happens to be Document Preparation.</p> 
1c	<p>On the same line as the module, but on the left is your Menu Toolbar. These options listed will change depending upon what screen you are on.</p> 

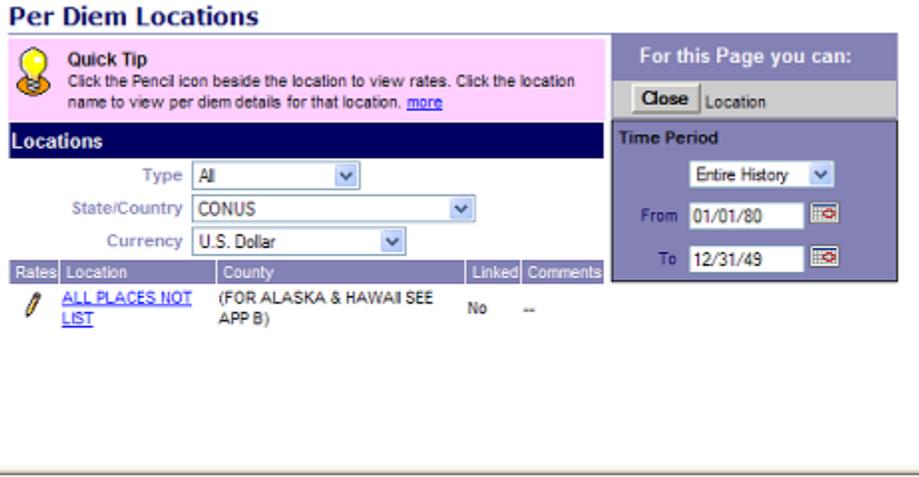
Step	Action																																																																							
1d	<p>Down the left side of the screen is the Document Toolbar. These options listed will change if you are in a document OR depending upon what screen you are on.</p>																																																																							
1e	<p>In the upper left corner to the right of the Document Toolbar is the Screen name. In this case we are on the <i>Home</i> screen.</p> <p></p>																																																																							
1f	<p>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.</p> <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> <p>Along with the Quick Tips is the News area. Things that are important for the user(s) to know will appear here.</p> <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>																																																																							
1g	<p>Underneath the quick tips/news 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 <i>Traveler Listing (Open/Copy Document)</i> screen. Allowing you to search by a traveler and document type.</p> <p>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 <i>Review Document</i> 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 <i>Home</i> screen.</p> <table border="1" data-bbox="289 1656 1419 1850"> <thead> <tr> <th colspan="5">Last Documents more</th> <th colspan="5">Documents to review more</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> TA</td> <td>000600010</td> <td>1DABS0001</td> <td>06/21/11</td> <td></td> <td> TA</td> <td>000600004</td> <td>1SAFS0100</td> <td>09/26/11</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>2SAFS0001</td> <td>10/12/11</td> <td></td> <td> TA</td> <td>000600004</td> <td>2SAFS0001</td> <td>10/12/11</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>1SAFS0100</td> <td>09/26/11</td> <td></td> <td> TA</td> <td>000600004</td> <td>0SAFS0001</td> <td>09/26/10</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>0SAFS0001</td> <td>09/26/10</td> <td></td> <td> TA</td> <td>000600008</td> <td>0NCAS0001</td> <td>05/17/10</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>0SAFS0002</td> <td>10/12/10</td> <td></td> <td> TA</td> <td>000600004</td> <td>0SAFS0002</td> <td>10/12/10</td> <td></td> </tr> </tbody> </table>		Last Documents more					Documents to review more					Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use	 TA	000600010	1DABS0001	06/21/11		 TA	000600004	1SAFS0100	09/26/11		 TA	000600004	2SAFS0001	10/12/11		 TA	000600004	2SAFS0001	10/12/11		 TA	000600004	1SAFS0100	09/26/11		 TA	000600004	0SAFS0001	09/26/10		 TA	000600004	0SAFS0001	09/26/10		 TA	000600008	0NCAS0001	05/17/10		 TA	000600004	0SAFS0002	10/12/10		 TA	000600004	0SAFS0002	10/12/10	
Last Documents more					Documents to review more																																																																			
Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use																																																															
 TA	000600010	1DABS0001	06/21/11		 TA	000600004	1SAFS0100	09/26/11																																																																
 TA	000600004	2SAFS0001	10/12/11		 TA	000600004	2SAFS0001	10/12/11																																																																
 TA	000600004	1SAFS0100	09/26/11		 TA	000600004	0SAFS0001	09/26/10																																																																
 TA	000600004	0SAFS0001	09/26/10		 TA	000600008	0NCAS0001	05/17/10																																																																
 TA	000600004	0SAFS0002	10/12/10		 TA	000600004	0SAFS0002	10/12/10																																																																

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

Step	Action
3a	<p>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. Below is a screenshot of a Group/Routing Administrator's options.</p>  <p>The report which will help users is the <i>User Configuration Report</i>. Clicking on that report link will bring up the following screen:</p>  <p>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.</p>

Step	Action
3b	<p>Clicking on the Preview Report button, will bring up a new window.</p>  <p>This report lists the basic information about the user. It includes:</p> <ul style="list-style-type: none"> • User Record Information • Travel Record Information • Routing List Administrator(s) • If a Group Administrator the individuals you can prepare documents for • The other people that can access documents within the group • Routing List information • If Review/Approver, which routing lists you are listed on

Step	Action	
4	<p>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.</p> <p>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.</p>	
4a	<p>When clicking on Remove Edit Locks, the following screen will appear:</p>  <p>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.</p>	
5	<p>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.</p>	

Step	Action
5a	<p>Clicking on Per Diem Locations brings up the following screen:</p>  <p>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, including those locations that may no longer be active.</p>

Step	Action																														
5b	<p>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.</p> <div data-bbox="289 428 1422 1003" style="border: 1px solid black; padding: 10px;"> <h3 style="margin: 0;">Per Diem Locations</h3> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 60%;"> <div style="background-color: #fce4ec; padding: 5px; margin-bottom: 10px;"> <p>Quick Tip Click the Pencil icon beside the location to view rates. Click the location name to view per diem details for that location. more</p> </div> <div style="background-color: #3b4a8c; color: white; padding: 5px; margin-bottom: 10px;"> Locations </div> <div style="margin-bottom: 10px;"> <p>Type: <input type="text" value="All"/></p> <p>State/Country: <input type="text" value="MASSACHUSETTS"/></p> <p>Currency: <input type="text" value="U.S. Dollar"/></p> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Rates</th> <th style="width: 30%;">Location</th> <th style="width: 20%;">County</th> <th style="width: 10%;">Linked</th> <th style="width: 35%;">Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td>ANDOVER</td> <td>ESSEX</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BARNES MAP AGS</td> <td>HAMPDEN</td> <td>Yes</td> <td>--</td> </tr> <tr> <td></td> <td>BARNES MAP AGS</td> <td>HAMPDEN</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BOSTON</td> <td>SUFFOLK</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BOSTON NAVY RECRUITING DIST</td> <td>SUFFOLK</td> <td>Yes</td> <td>--</td> </tr> </tbody> </table> </div> <div style="width: 35%; background-color: #3b4a8c; color: white; padding: 5px;"> <p>For this Page you can:</p> <p><input type="button" value="Close"/> Location</p> <hr/> <p>Time Period</p> <p>Entire History <input type="text" value=""/></p> <p>From: <input type="text" value="01/01/80"/> </p> <p>To: <input type="text" value="12/31/49"/> </p> </div> </div> </div> <p>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.</p>	Rates	Location	County	Linked	Comments		ANDOVER	ESSEX	No	--		BARNES MAP AGS	HAMPDEN	Yes	--		BARNES MAP AGS	HAMPDEN	No	--		BOSTON	SUFFOLK	No	--		BOSTON NAVY RECRUITING DIST	SUFFOLK	Yes	--
Rates	Location	County	Linked	Comments																											
	ANDOVER	ESSEX	No	--																											
	BARNES MAP AGS	HAMPDEN	Yes	--																											
	BARNES MAP AGS	HAMPDEN	No	--																											
	BOSTON	SUFFOLK	No	--																											
	BOSTON NAVY RECRUITING DIST	SUFFOLK	Yes	--																											

Step	Action																																																																																																
5c	<p>Click the View Rates  icon in order to populate in the lower half of the screen the rates for that location.</p> <table border="1" data-bbox="289 405 1424 558"> <thead> <tr> <th colspan="8">Rates for ANDOVER, MASSACHUSETTS</th> </tr> <tr> <th>Lodging</th> <th>M & IE</th> <th>Eff Date</th> <th>Expdate</th> <th>Snl St</th> <th>Snl End</th> <th>Currency</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td> 83.00</td> <td>56.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 88.00</td> <td>56.00</td> <td>10/01/09</td> <td>09/30/10</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 90.00</td> <td>59.00</td> <td>10/01/08</td> <td>09/30/09</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> </tbody> </table> <p>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:</p> <table border="1" data-bbox="289 814 1424 1035"> <thead> <tr> <th colspan="8">Rates for BOSTON, MASSACHUSETTS</th> </tr> <tr> <th>Lodging</th> <th>M & IE</th> <th>Eff Date</th> <th>Expdate</th> <th>Snl St</th> <th>Snl End</th> <th>Currency</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td> 154.00</td> <td>71.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>11/01</td> <td>03/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 206.00</td> <td>71.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>10/01</td> <td>10/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 206.00</td> <td>71.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>09/01</td> <td>09/30</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 171.00</td> <td>71.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>07/01</td> <td>08/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 190.00</td> <td>71.00</td> <td>10/01/10</td> <td>12/31/49</td> <td>04/01</td> <td>06/30</td> <td>USD</td> <td>--</td> </tr> </tbody> </table>	Rates for ANDOVER, MASSACHUSETTS								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment	 83.00	56.00	10/01/10	12/31/49	01/01	12/31	USD	--	 88.00	56.00	10/01/09	09/30/10	01/01	12/31	USD	--	 90.00	59.00	10/01/08	09/30/09	01/01	12/31	USD	--	Rates for BOSTON, MASSACHUSETTS								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment	 154.00	71.00	10/01/10	12/31/49	11/01	03/31	USD	--	 206.00	71.00	10/01/10	12/31/49	10/01	10/31	USD	--	 206.00	71.00	10/01/10	12/31/49	09/01	09/30	USD	--	 171.00	71.00	10/01/10	12/31/49	07/01	08/31	USD	--	 190.00	71.00	10/01/10	12/31/49	04/01	06/30	USD	--
Rates for ANDOVER, MASSACHUSETTS																																																																																																	
Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment																																																																																										
 83.00	56.00	10/01/10	12/31/49	01/01	12/31	USD	--																																																																																										
 88.00	56.00	10/01/09	09/30/10	01/01	12/31	USD	--																																																																																										
 90.00	59.00	10/01/08	09/30/09	01/01	12/31	USD	--																																																																																										
Rates for BOSTON, MASSACHUSETTS																																																																																																	
Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment																																																																																										
 154.00	71.00	10/01/10	12/31/49	11/01	03/31	USD	--																																																																																										
 206.00	71.00	10/01/10	12/31/49	10/01	10/31	USD	--																																																																																										
 206.00	71.00	10/01/10	12/31/49	09/01	09/30	USD	--																																																																																										
 171.00	71.00	10/01/10	12/31/49	07/01	08/31	USD	--																																																																																										
 190.00	71.00	10/01/10	12/31/49	04/01	06/30	USD	--																																																																																										
6	<p>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.</p>																																																																																																