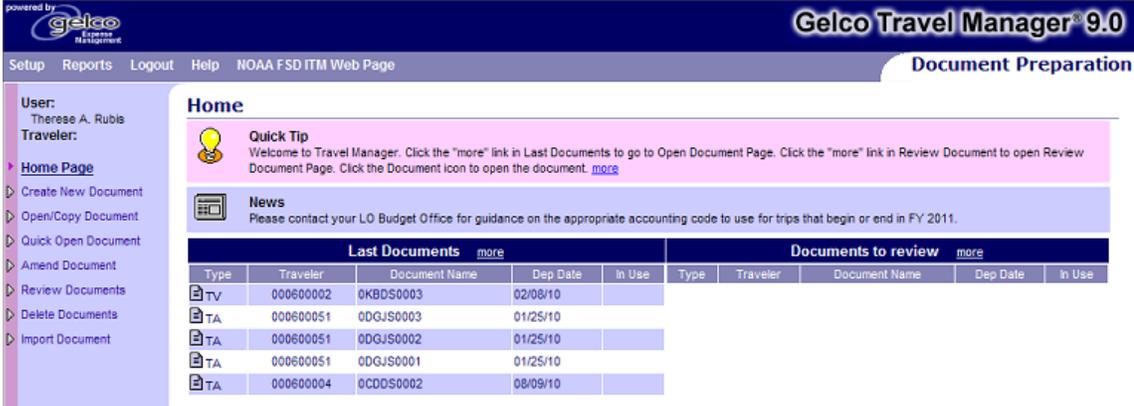


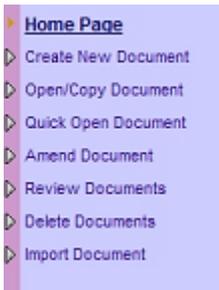
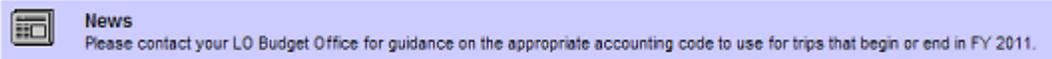
**Exercise #1a: Navigation Basics**

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

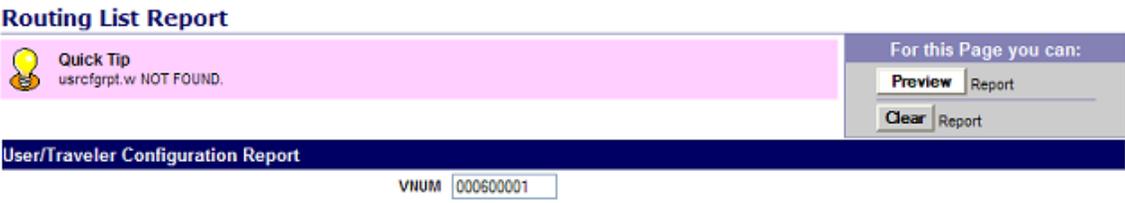
**Instructions:** Execute the following steps:

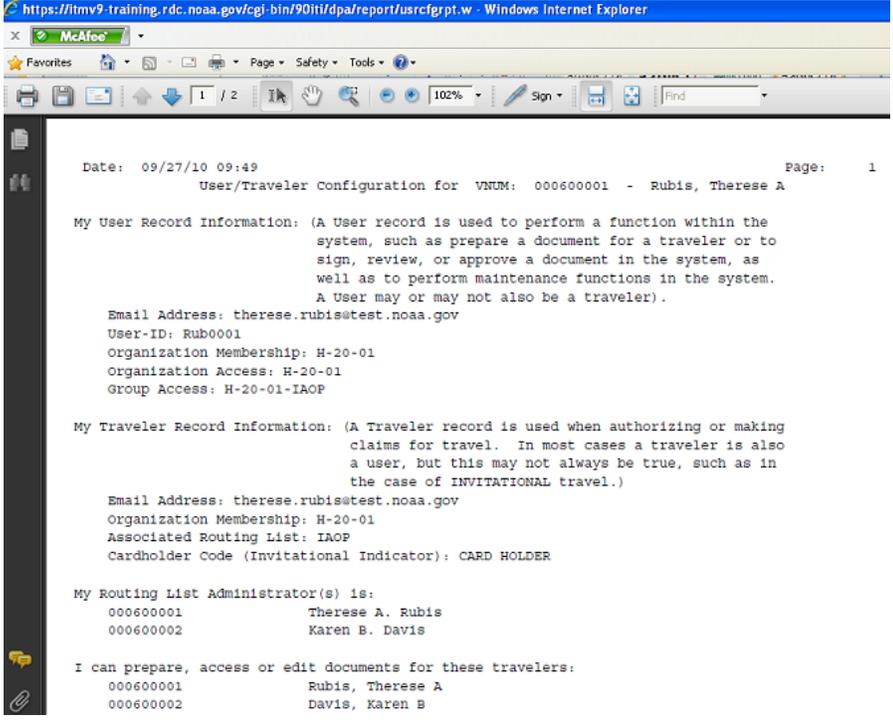
You have just logged into Travel Manager for the first time. Let’s go over some basics so you will be able to navigate the system.

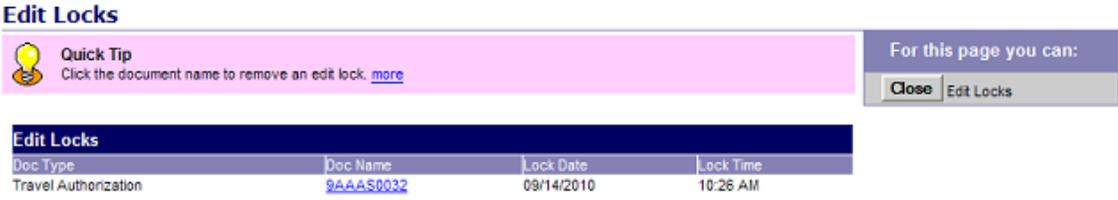
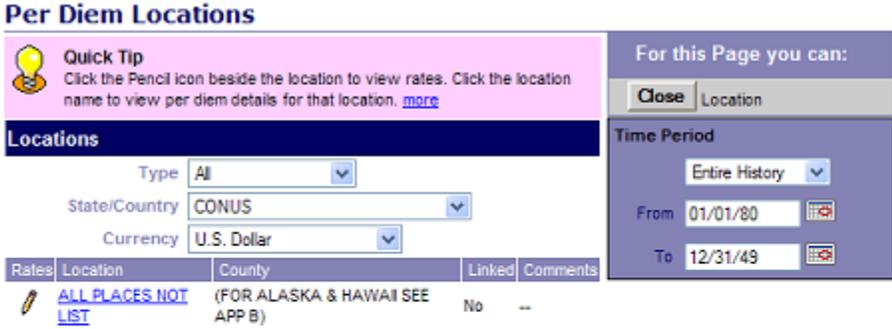
Step	Action
1	<p>Upon first logging in you will come to the <i>Home</i> screen.</p> 
1a	<p>At the top of the <i>Home</i> screen are the Gelco Logos.</p> 
1b	<p>Underneath the logos on the right side is the “module” you are in, which happens to be Document Preparation.</p> 
1c	<p>On the same line as the module, but on the left is your <b>Menu Toolbar</b>. 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 <b>Document Toolbar</b>. 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 <b>Screen</b> name. In this case we are on the <i>Home</i> screen.</p> <p><u>Home</u></p>																																																																							
1f	<p>Underneath the screen name are <b>Quick Tips</b>. Most of these are standard Travel Manager tips about the software; however, some of the tips are specific to NOAA.</p>  <p>Along with the Quick Tips is the <b>News</b> area. Things that are important for the user(s) to know will appear here.</p> 																																																																							
1g	<p>Underneath the quick tips/news are two sections. The left column is the <b>Last Documents</b>. 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 <b>More</b> 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 <b>Documents to Review</b>. This area will display the five oldest documents in your review queue. By clicking the <b>More</b> 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="285 1629 1416 1822"> <thead> <tr> <th colspan="5">Last Documents <a href="#">more</a></th> <th colspan="5">Documents to review <a href="#">more</a></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>000085065</td> <td>9EKCS0040</td> <td>08/08/09</td> <td></td> <td> TA</td> <td>000085065</td> <td>8EKRS0009-1</td> <td>07/21/08</td> <td></td> </tr> <tr> <td> TA</td> <td>000000006</td> <td>9ED3F0169</td> <td>08/14/09</td> <td></td> <td> TA</td> <td>000085065</td> <td>9AAAS0032</td> <td>10/02/09</td> <td></td> </tr> <tr> <td> TV</td> <td>000085065</td> <td>8EKCS0009</td> <td>09/16/08</td> <td>*</td> <td> TV</td> <td>000085065</td> <td>8EKCS0009</td> <td>09/16/08</td> <td>*</td> </tr> <tr> <td> TA</td> <td>000085065</td> <td>9AAAS0032</td> <td>10/02/09</td> <td></td> <td> TA</td> <td>000000006</td> <td>9ED3F0169</td> <td>08/14/09</td> <td></td> </tr> <tr> <td> TA</td> <td>000085065</td> <td>8EKC0001</td> <td>03/24/08</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Last Documents <a href="#">more</a>					Documents to review <a href="#">more</a>					Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use	TA	000085065	9EKCS0040	08/08/09		TA	000085065	8EKRS0009-1	07/21/08		TA	000000006	9ED3F0169	08/14/09		TA	000085065	9AAAS0032	10/02/09		TV	000085065	8EKCS0009	09/16/08	*	TV	000085065	8EKCS0009	09/16/08	*	TA	000085065	9AAAS0032	10/02/09		TA	000000006	9ED3F0169	08/14/09		TA	000085065	8EKC0001	03/24/08						
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Step	Action
2	<p>From the Menu Toolbar click on <b>Setup</b>. A new window will open up for the module <b>Administrative Setup</b>.</p> 
3	<p>Click on <b>Reports</b> in the Menu Toolbar, the document toolbar options change.</p> 

Step	Action
3a	<p>Click on <b>Custom Reports</b> 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 <b>Preview</b> 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"> <li>• User Record Information</li> <li>• Travel Record Information</li> <li>• Routing List Administrator(s)</li> <li>• If a Group Administrator the individuals you can prepare documents for</li> <li>• The other people that can access documents within the group</li> <li>• Routing List information</li> <li>• If Review/Approver, which routing lists you are listed on</li> </ul>
4	<p>Click on <b>Admin</b> 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>	

Step	Action
4a	<p>When clicking on <b>Remove Edit Locks</b>, 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 <b>Rates</b> 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> 
5a	<p>Clicking on <b>Per Diem Locations</b> 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="289 394 1230 871" style="border: 1px solid black; padding: 5px;"> <p><b>Per Diem Locations</b></p> <div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p><b>Quick Tip</b>                      Click the Pencil icon beside the location to view rates. Click the location name to view per diem details for that location. <a href="#">more</a></p> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p><b>Locations</b></p> <p>Type: <input type="text" value="All"/></p> <p>State/Country: <input type="text" value="COLORADO"/></p> <p>Currency: <input type="text" value="U.S. Dollar"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Rates</th> <th>Location</th> <th>County</th> <th>Linked</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td><a href="#">ADAMS COUNTY</a></td> <td>DENVER</td> <td>Yes</td> <td>--</td> </tr> <tr> <td></td> <td><a href="#">ARAPAHOE COUNTY</a></td> <td>ARAPAHOE</td> <td>No</td> <td>same as Denver</td> </tr> <tr> <td></td> <td><a href="#">ARAPAHOE COUNTY</a></td> <td>ARAPAHOE</td> <td>No</td> <td>Receives Denver rate.</td> </tr> <tr> <td></td> <td><a href="#">ARAPAHOE COUNTY</a></td> <td>ARAPAHOE</td> <td>Yes</td> <td>--</td> </tr> </tbody> </table> </div> <div style="width: 35%; border: 1px solid #ccc; padding: 5px;"> <p><b>For this Page you can:</b></p> <p><input type="button" value="Close"/> <input type="text" value="Location"/></p> <p><b>Time Period</b></p> <p>Entire History <input type="text" value=""/></p> <p>From: <input type="text" value="01/01/80"/> <input type="button" value="Calendar"/></p> <p>To: <input type="text" value="12/31/49"/> <input type="button" value="Calendar"/></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		<a href="#">ADAMS COUNTY</a>	DENVER	Yes	--		<a href="#">ARAPAHOE COUNTY</a>	ARAPAHOE	No	same as Denver		<a href="#">ARAPAHOE COUNTY</a>	ARAPAHOE	No	Receives Denver rate.		<a href="#">ARAPAHOE COUNTY</a>	ARAPAHOE	Yes	--
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5c	<p>Click the <b>View Rates</b>  icon in order to populate in the lower half of the screen the rates for that location.</p> <table border="1" data-bbox="289 373 1117 489"> <tr> <td></td> <td>DENVER</td> <td>DENVER</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>DENVER NAVAL &amp; MC RES CTR</td> <td>DENVER</td> <td>Yes</td> <td>--</td> </tr> <tr> <td></td> <td>DOUGLAS COUNTY</td> <td>DOUGLAS</td> <td>No</td> <td>--</td> </tr> </table> <table border="1" data-bbox="289 514 1382 688"> <thead> <tr> <th colspan="8">Rates for DENVER, COLORADO</th> </tr> <tr> <th>Lodging</th> <th>M &amp; 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></td> <td>158.00</td> <td>66.00</td> <td>10/01/09</td> <td>12/31/49</td> <td>01/01</td> <td>12/31</td> <td>USD --</td> </tr> <tr> <td></td> <td>149.00</td> <td>49.00</td> <td>10/01/08</td> <td>09/30/09</td> <td>01/01</td> <td>12/31</td> <td>USD --</td> </tr> <tr> <td></td> <td>140.00</td> <td>49.00</td> <td>10/01/07</td> <td>09/30/08</td> <td>01/01</td> <td>12/31</td> <td>USD --</td> </tr> <tr> <td></td> <td>127.00</td> <td>49.00</td> <td>10/01/06</td> <td>09/30/07</td> <td>01/01</td> <td>12/31</td> <td>USD --</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="289 947 1369 1115"> <thead> <tr> <th colspan="8">Rates for BOULDER, COLORADO</th> </tr> <tr> <th>Lodging</th> <th>M &amp; 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></td> <td>103.00</td> <td>61.00</td> <td>10/01/09</td> <td>12/31/49</td> <td>11/01</td> <td>04/30</td> <td>USD --</td> </tr> <tr> <td></td> <td>124.00</td> <td>61.00</td> <td>10/01/09</td> <td>12/31/49</td> <td>10/01</td> <td>10/31</td> <td>USD --</td> </tr> <tr> <td></td> <td>124.00</td> <td>61.00</td> <td>10/01/09</td> <td>12/31/49</td> <td>05/01</td> <td>09/30</td> <td>USD --</td> </tr> </tbody> </table>		DENVER	DENVER	No	--		DENVER NAVAL & MC RES CTR	DENVER	Yes	--		DOUGLAS COUNTY	DOUGLAS	No	--	Rates for DENVER, COLORADO								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment		158.00	66.00	10/01/09	12/31/49	01/01	12/31	USD --		149.00	49.00	10/01/08	09/30/09	01/01	12/31	USD --		140.00	49.00	10/01/07	09/30/08	01/01	12/31	USD --		127.00	49.00	10/01/06	09/30/07	01/01	12/31	USD --	Rates for BOULDER, COLORADO								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment		103.00	61.00	10/01/09	12/31/49	11/01	04/30	USD --		124.00	61.00	10/01/09	12/31/49	10/01	10/31	USD --		124.00	61.00	10/01/09	12/31/49	05/01	09/30	USD --
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6	<p>To close out the setup, click the red “X” in the upper right hand corner or click <b>Close</b> 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>																																																																																																							