

Extras #6: Electronic Routing Overview

Electronic routing is the way in which documents systematically move through the system for review/approval signatures for employees. It should mimic the process in which hard copy documentation would route through an individual's organization for signatures. It comes with the added benefits for employees such as:

- ITM Pre-audit validations
- E-mail notifications to:
 - Reviewing/Approving Officials for documents awaiting their review/approval
 - Traveler when voucher is approved and now paid
 - Traveler, Preparer and Approver when documents are being audited
- ACCS and Funds Validation
- Near real-time posting and confirmation of obligated funds within CFS

In order for electronic routing to work, a traveler must have a routing list assigned to their Traveler Profile record. Routing lists determine when and to whom to route a traveler's document for review and/or approval signatures.

It is the responsibility of the traveler's Routing Administrator to ensure the routing list is setup appropriately and assigned to each employee traveler within their organization. Routing lists should **never** be on an Excepted Traveler's profile (*i.e. Invitational/Bargaining Unit*)

Once routing is assigned to an employee traveler, anytime a document is created and electronically stamped SIGNED, the routing process will electronically route documents to officials based on the traveler's routing list.

Certain conditions on the travel document can cause a traveler's document to route outside the "normal" process for additional and/or higher levels of review/approvals. This method is referred to as "conditional routing" (*i.e. Foreign Travel*).

If Conditional Routing is applicable and appropriately setup in the traveler's routing list, nothing additional is required at the time the document is electronically stamped SIGNED. Based on the information contained within the document, such as Per Diem location(s), Expenses, Trip Purpose, etc., the system will handle the: Who, What, When, Where and Why as it relates to routing the document.

For NOAA/BIS Employees, the Group Administrator creating the travel authorization must stamp the travel authorization with the status of SIGNED to initiate the routing process once the document is ready for review/approval. This is done using the **Document Status** screen. Once the document is stamped with the status of "SIGNED" and passes all Pre-Audit and CFS validations, the preparer will return to the **Home** screen and the email(s) of the person(s) that are the first level of review and/or approval in the routing list will appear.

Regardless of whether a Group Administrator created the NOAA/BIS Employee's travel voucher, the **Traveler** is responsible for stamping the travel voucher with the status of "SIGNED" to initiate the routing process.

The Group Administrator is responsible for stamping of the travel vouchers with the status of “SIGNED” in the system for Excepted NWSEO Bargaining Unit Employees and Invitational Travelers. These travel documents will not route electronically through the system to the Reviewing/Approving Official because these individuals are not assigned a routing list. These excepted travelers **must sign a hard copy travel voucher** BEFORE the Group Administrator stamps the document in the system. Once the document is stamped with the status of “SIGNED”, the Group Administrator must “manually” (i.e. phone, person, or email) inform the Approving Official the document is ready for their review/approval.

After the document has been stamped with the status of “SIGNED” the **Document Status** screen will then show the current routing for that document as well as the history of what has been done to the document.

User: Therese A. Rubis
Traveler: Karen Davis
TA: 0KADS0001 (0KADS0001)

- Document Summary
- DOC Conference
- Traveler Info
- Document Information
- Charge Card Manager
- Expenses
- Other Authorizations
- Accounting
- Totals
- Document Status**
- Perform Pre-Audits
- Preview Document
- Close Document

Status for 0KADS0001 (View Only)

Quick Tip
 The Signature PIN is case sensitive! [more](#)

For this Document you can:

Document Routing			This is the routing path the current document will take once routed	
Name	Status	Level		
Laura S. Goldstein	REVIEWED	1		
Jon O. Striver	REVIEWED	1		
Pauline K. Garcia	APPROVED	6		
Parke L. Brown	APPROVED	6		

Document History					This is the status history for this document	
Date/Time	Status	Name	Remarks	Reason Desc		
10/26/10 9:17AM	CREATED	Therese A. Rubis				
10/26/10 9:19AM	SIGNED	Therese A. Rubis				

User: Therese A. Rubis
Traveler: Scott Wenher
TA: 0SAWF0001 (0SAWF0001)

- Document Summary
- DOC Conference
- Traveler Info
- Document Information
- Charge Card Manager
- Expenses
- Other Authorizations
- Accounting
- Totals
- Document Status**
- Perform Pre-Audits
- Preview Document
- Close Document

Status for 0SAWF0001 (View Only)

Quick Tip
 The Signature PIN is casesensitive! [more](#)

For this Document you can:

Document Routing			This is the routing path the current document will take once routed	
Name	Status	Level		
Laura S. Goldstein	REVIEWED	1		
Jon O. Striver	REVIEWED	1		
Pauline K. Garcia	REVIEWED	3		
Parke L. Brown	REVIEWED	3		
Evangeline Falan	REVIEWED	4		
William D. Graham	REVIEWED	4		
Chasity Donaldson	PROCESSED	5		
Rachael Wivell	PROCESSED	5		
Betsy P. Durant	APPROVED	6		
Mike M. Papadakis	APPROVED	6		

Document History					This is the status history for this document	
Date/Time	Status	Name	Remarks	Reason Desc		
10/26/10 9:20AM	CREATED	Therese A. Rubis				
10/26/10 9:23AM	SIGNED	Therese A. Rubis				