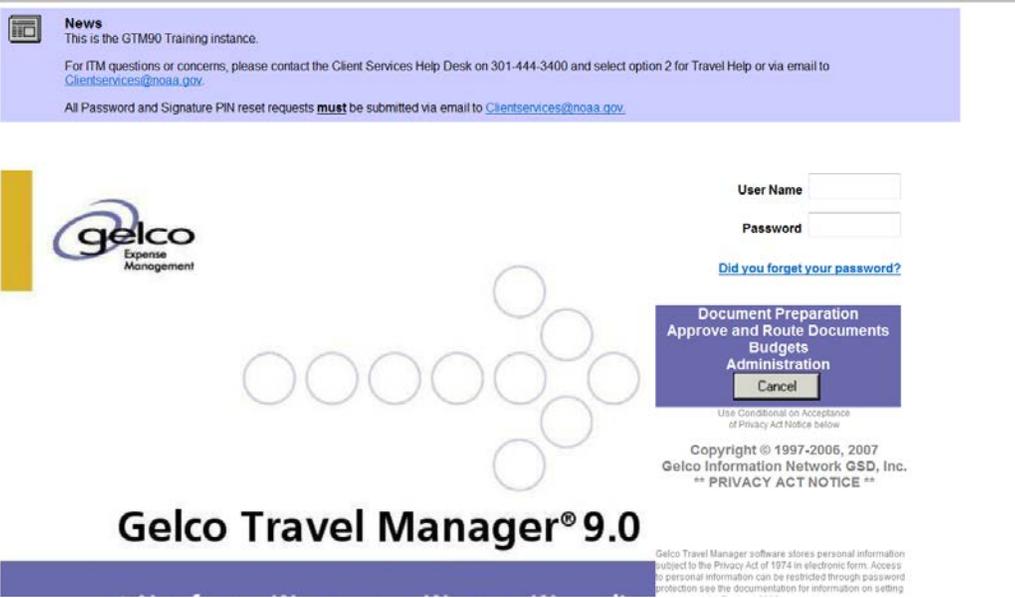
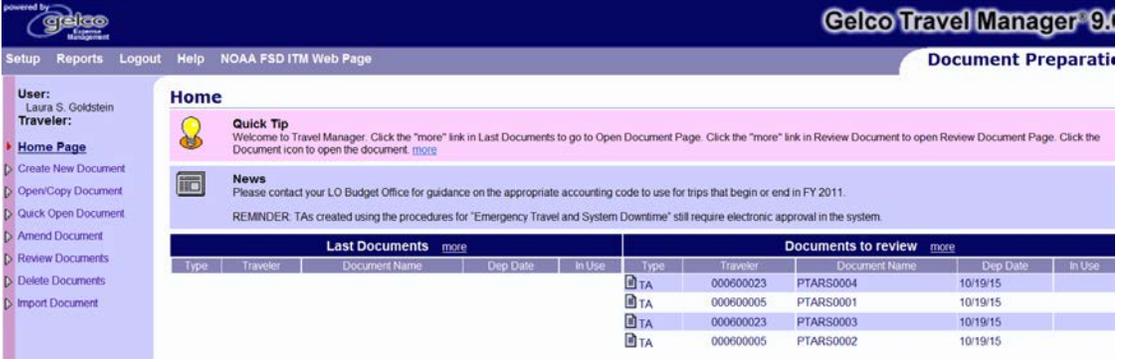


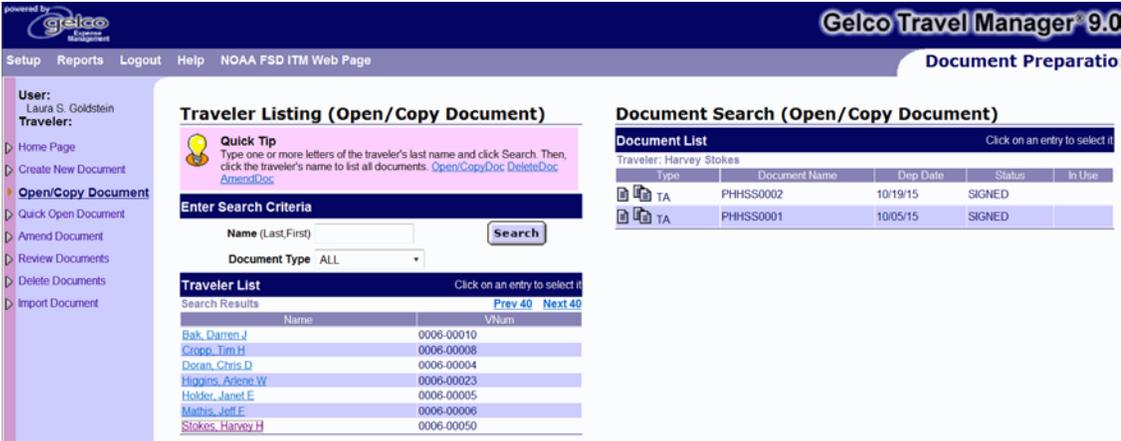
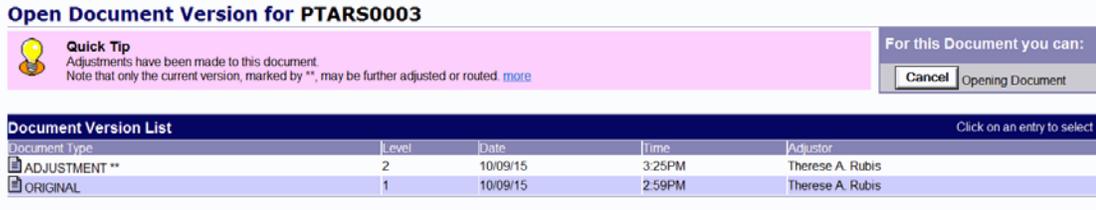
## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
1a	<ul style="list-style-type: none"> <li>➤ Open Internet Explorer</li> <li>➤ Go to the URL for Travel Manager</li> </ul>
1b	<ul style="list-style-type: none"> <li>➤ Enter your <b>Username</b> &amp; <b>Password</b> on the <b>Login Page</b></li> <li>➤ Click on <b>Document Preparation</b></li> </ul> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  <p><b>News</b> This is the GTM90 Training instance. For ITM questions or concerns, please contact the Client Services Help Desk on 301-444-3400 and select option 2 for Travel Help or via email to <a href="mailto:Clientservices@noaa.gov">Clientservices@noaa.gov</a>. All Password and Signature PIN reset requests <b>must</b> be submitted via email to <a href="mailto:Clientservices@noaa.gov">Clientservices@noaa.gov</a>.</p> <p><b>gelco</b> Expense Management</p> <p>User Name <input type="text"/> Password <input type="password"/> <a href="#">Did you forget your password?</a></p> <p><b>Document Preparation</b> Approve and Route Documents Budgets Administration <input type="button" value="Cancel"/></p> <p>Use Conditional on Acceptance of Privacy Act Notice below Copyright © 1997-2006, 2007 Gelco Information Network GSD, Inc. ** PRIVACY ACT NOTICE **</p> <p style="text-align: center;"><b>Gelco Travel Manager® 9.0</b></p> <p><small>Gelco Travel Manager software stores personal information subject to the Privacy Act of 1974 in electronic form. Access to personal information can be restricted through password protection. For information on setting...</small></p> </div> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>✓ <i>If you press ENTER after entering your Username and Password, the system will automatically go into the Document Preparation module.</i></li> <li>✓ <i>If this is the first time logging into the system, you may be prompted to change your Password and/or enter a Signature Pin.</i></li> <li>✓ <i>NOAA does not use the Approve and Route Documents module in ITM. All approvals are done from the Document Preparation module.</i></li> </ul> </div>

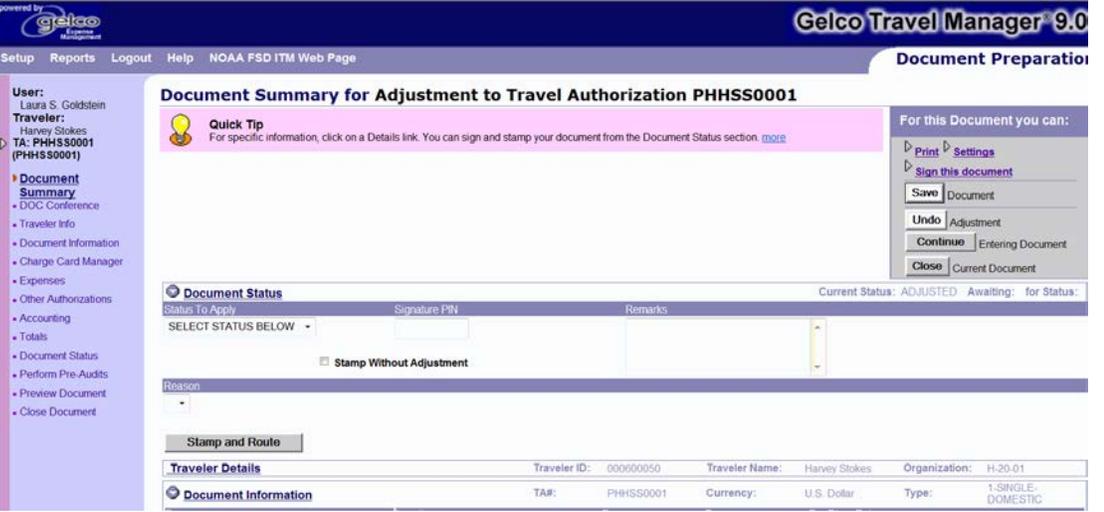
## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
2	<p>The <b>Home</b> screen appears.</p>  <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ <i>Up to five (5) documents will show in the Review area on the Home screen.</i></li> <li>✓ <i>The oldest documents will appear first.</i></li> <li>✓ <i>Excepted Traveler documents will not route electronically.</i></li> <li>✓ <i>Reviewing/Approving Officials must have the same group access as Group Administrators in order to review/approve excepted travelers.</i></li> </ul>
3a	<p>From the <b>Home</b> screen:</p> <ul style="list-style-type: none"> <li>➤ Click on <b>Open/Copy Document</b> link in the <i>Document Toolbar</i></li> </ul>
3b	<p>The <b>Traveler Listing (Open/Copy Document)</b> screen appears</p>  <ul style="list-style-type: none"> <li>➤ Click on the traveler's name in the listing</li> </ul>

## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
	<p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ <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></li> <li>✓ <i>The traveler listing will only list those travelers in the group that have travel documents.</i></li> <li>✓ <i>Searches can be done by traveler's last name and document type.</i></li> </ul>
3c	<p>The traveler's documents will appear on the right side of the screen.</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 <b>Open Document Version</b> 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>➤ Go to Step 4b</p>

## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
4b	<p>If there have been no revisions to the travel document or after clicking on the most recent adjustment/amendment the <b>Open Document Signature</b> screen appears.</p>  <p>➤ Enter Signature PIN ➤ Click <b>Sign (to Review Document)</b> button</p> <p><b>Notes:</b></p> <p>✓ To open a document in <b>View Only</b> mode, do not enter your Signature PIN, and click the <b>Get (Document as View Only)</b> button.</p>
5	<p>The <b>Document Summary</b> screen appears</p>  <p><b>Notes:</b></p> <p>✓ To back out of an adjustment without taking any action (i.e. making changes or applying a signature stamp), you <b>MUST</b> click the <b>Undo (Adjustment)</b> 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>

## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action
6	Once the document has been reviewed and is ready to be stamped it can be done one of two ways. From the <b>Document Summary</b> screen follow step 6a. From the <b>Document Status</b> screen follow step 6b.
6a	<p>From the <b>Document Summary</b> screen do the following:</p> <ul style="list-style-type: none"> <li>➤ Make sure the status to apply says REVIEWED or APPROVED, depending on your role.</li> <li>➤ Type in your <b>Signature PIN</b></li> <li>➤ Enter Remarks (if any)</li> <li>➤ Check the checkbox (if no adjustments have been made to the document – see note below)</li> <li>➤ Click on the <b>Stamp and Route</b> button</li> <li>➤ Go to Step 7</li> </ul> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>✓ <i>The Stamp and Route button is toward the bottom of the Document Status section.</i></li> <li>✓ <i>If you type your Signature PIN and press ENTER that will only save the adjustment not stamp the document.</i></li> <li>✓ <i>Not checking the checkbox will leave the adjusted status in the history of the document even though there wasn't an adjustment.</i></li> <li>✓ <i>Reviewers/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 they 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></li> </ul>

## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

Step	Action																										
6b	<p>To stamp a document from the <b>Document Summary</b> screen do the following:</p> <p>Click on the <b>Document Status</b> link from either the header section in the Document Summary or from the <i>Menu Toolbar</i></p> <div style="display: flex; justify-content: space-around; margin-top: 10px;">   </div>																										
6b1	<p>The <b>Document Status</b> screen appears.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p><b>Status for PHSS0001</b></p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 60%;"> <p><b>Quick Tip</b> The Signature PIN is case sensitive! <a href="#">more</a></p> <p>Status to Apply: <span>SELECT STATUS BELOW</span> ▾</p> <p>Signature PIN: <input type="text"/></p> <p>Reason: ▾</p> <p>Remarks: <input type="text"/></p> </div> <div style="width: 35%; border: 1px solid #ccc; padding: 5px;"> <p>Stamp Document Without Adjustment</p> </div> </div> <div style="margin-top: 10px; border: 1px solid #ccc; padding: 5px;"> <p><b>For this Document you can:</b></p> <p><input type="button" value="Stamp"/> and Submit Document</p> <p><input type="button" value="Adjustments"/> <input type="button" value="Go To Adjustments"/></p> <p><input type="button" value="Back"/> <input type="button" value="Continue"/></p> </div> </div> <div style="margin-top: 10px;"> <p><b>Document Routing</b> <span style="float: right;">This is the routing path the current document will take once route</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <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><b>Document History</b> <span style="float: right;">This is the status history for this docume</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Date/Time</th> <th>Status</th> <th>Name</th> <th>Remarks</th> <th>Reason Desc</th> </tr> </thead> <tbody> <tr> <td>11/09/15 11:41AM</td> <td>CREATED</td> <td>Therese A. Rubis</td> <td> </td> <td> </td> </tr> <tr> <td>11/09/15 11:45AM</td> <td>SIGNED</td> <td>Therese A. Rubis</td> <td> </td> <td> </td> </tr> <tr> <td>11/09/15 11:55AM</td> <td>ADJUSTED</td> <td>Laura S. Goldstein</td> <td> </td> <td> </td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> <li>➤ Make sure the status to apply says REVIEWED/APPROVED</li> <li>➤ Type in your <b>Signature PIN</b></li> <li>➤ Enter Remarks (if any)</li> <li>➤ Check the checkbox (if no adjustments have been made to the document – see note below)</li> <li>➤ Click the <b>Stamp (and Submit Document)</b> button</li> </ul>	Name	Status	Level				Date/Time	Status	Name	Remarks	Reason Desc	11/09/15 11:41AM	CREATED	Therese A. Rubis			11/09/15 11:45AM	SIGNED	Therese A. Rubis			11/09/15 11:55AM	ADJUSTED	Laura S. Goldstein		
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7	<p>The <b>Pre-Audit Results</b> screen appears</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p><b>Pre-Audit Results for PHHSS0001</b></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 60%;"> <p> <b>Quick Tip</b> Click the Magnifying Glass icon to view detail comments for each audit process. <a href="#">more</a></p> <p><b>Document Name:</b> PHHSS0001 <b>Type:</b> TA <b>Traveler:</b> Stokes, Harvey <b>Status:</b> PASS</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #003366; color: white;"> <th colspan="3">Pre-Audit Results</th> </tr> <tr style="background-color: #cccccc;"> <th style="width: 70%;">Audit Process</th> <th style="width: 15%;">Status</th> <th style="width: 15%;">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 Amend to \$0</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 PAA AD-HOC EXPENSES</td><td>PASS</td><td></td></tr> <tr><td> DOC PAA DOCUMENT NAME</td><td>PASS</td><td></td></tr> <tr><td> DOC PAA FOREIGN HOTEL TAX</td><td>PASS</td><td></td></tr> <tr><td> DOC PAA LAUNDRY CONUS</td><td>PASS</td><td></td></tr> <tr><td> DOC PAA LAUNDRY FOREIGN</td><td>PASS</td><td></td></tr> </tbody> </table> </div> <div style="width: 35%; border: 1px solid #ccc; padding: 2px;"> <p style="text-align: center; background-color: #003366; color: white; margin: 0;">For this Document you can:</p> <div style="display: flex; justify-content: space-between; margin: 2px;"> <div style="border: 1px solid #ccc; padding: 2px; width: 45%; text-align: center;">Continue</div> <div style="margin: 0 5px;">Stamping the Document</div> </div> <div style="display: flex; justify-content: space-between; margin: 2px;"> <div style="border: 1px solid #ccc; padding: 2px; width: 45%; text-align: center;">Cancel</div> <div style="margin: 0 5px;">Pre-Audit Results</div> </div> </div> </div> </div>	Pre-Audit Results			Audit Process	Status	Comments	 ACCOUNT VALIDATION	PASS		 AMENDMENTS	PASS		 AMOUNT PAID TO TRAVELER	PASS		 APPROVAL BY TRAVELER	PASS		 DOC Amend to \$0	PASS		 DOC CONFERENCE VALIDATION	PASS		 DOC FY END PROCESSING	PASS		 DOC MILEAGE VALIDATION	PASS		 DOC PAA AD-HOC EXPENSES	PASS		 DOC PAA DOCUMENT NAME	PASS		 DOC PAA FOREIGN HOTEL TAX	PASS		 DOC PAA LAUNDRY CONUS	PASS		 DOC PAA LAUNDRY FOREIGN	PASS	
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## Reviewing/Approving Excepted Travelers' Documents in ITM 9.0

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9	<p>Approvers will see the following on their <b>Home</b> screen:</p> <p><b>Home</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p> <b>Quick Tip</b>  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. <a href="#">more</a></p> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p> <b>News</b>  Please contact your LO Budget Office for guidance on the appropriate accounting code to use for trips that begin or end in FY 2011.  REMINDER: TAs created using the procedures for "Emergency Travel and System Downtime" still require electronic approval in the system.</p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <thead> <tr style="background-color: #003366; color: white;"> <th colspan="5" style="text-align: left;">Last Documents <a href="#">more</a></th> <th colspan="5" style="text-align: left;">Documents to review <a href="#">more</a></th> </tr> <tr style="background-color: #003366; 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> TA</td> <td>000600050</td> <td>PHISS0001</td> <td>10/05/15</td> <td></td> <td> TA</td> <td>000600023</td> <td>PTARS0004</td> <td>10/19/15</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td> TA</td> <td>000600005</td> <td>PTARS0001</td> <td>10/19/15</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td> TA</td> <td>000600023</td> <td>PTARS0003</td> <td>10/19/15</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td> TA</td> <td>000600005</td> <td>PTARS0002</td> <td>10/19/15</td> <td></td> </tr> </tbody> </table> <p>Messages  *Email has been sent to <a href="mailto:therese.rubis@noaa.gov">therese.rubis@noaa.gov</a></p> <p>CBA OBLIGATION #:00191674 Organization ID:142002 TRAVELER PO#:00191673</p>	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	000600050	PHISS0001	10/05/15		 TA	000600023	PTARS0004	10/19/15							 TA	000600005	PTARS0001	10/19/15							 TA	000600023	PTARS0003	10/19/15							 TA	000600005	PTARS0002	10/19/15	
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