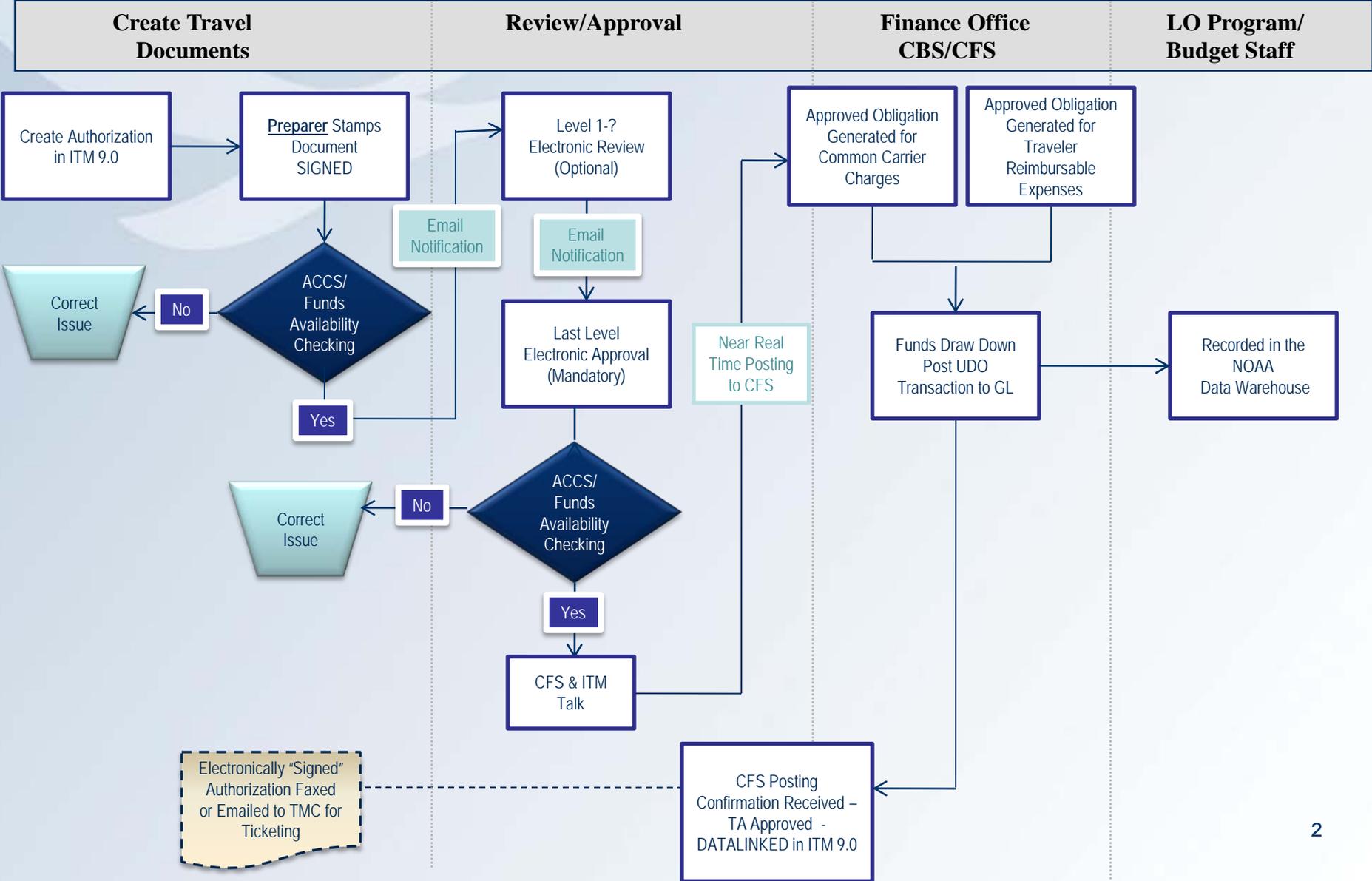


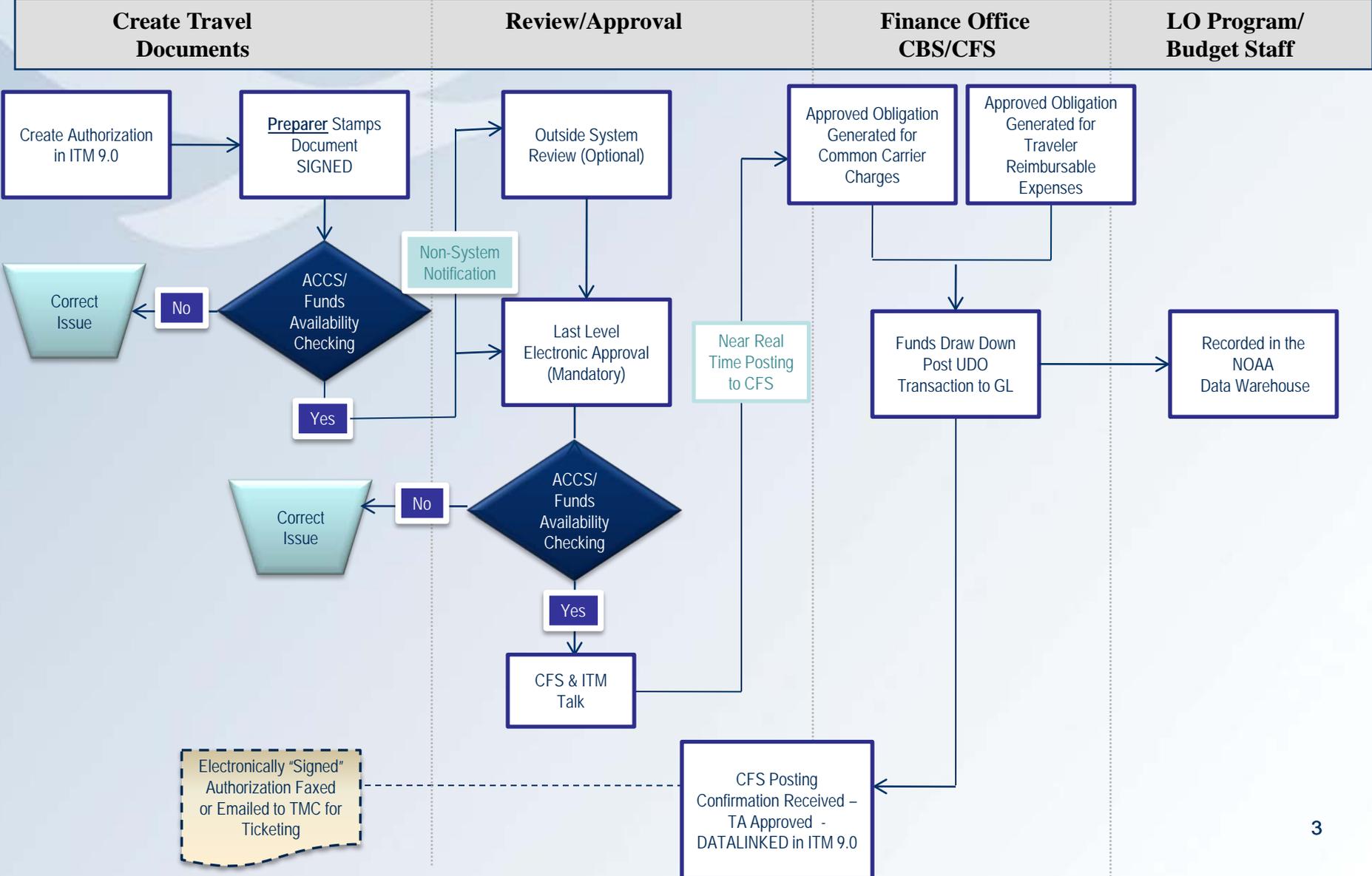
Routing Administration in Travel Manager 9.0

*FY 2011
November
V 1.0*

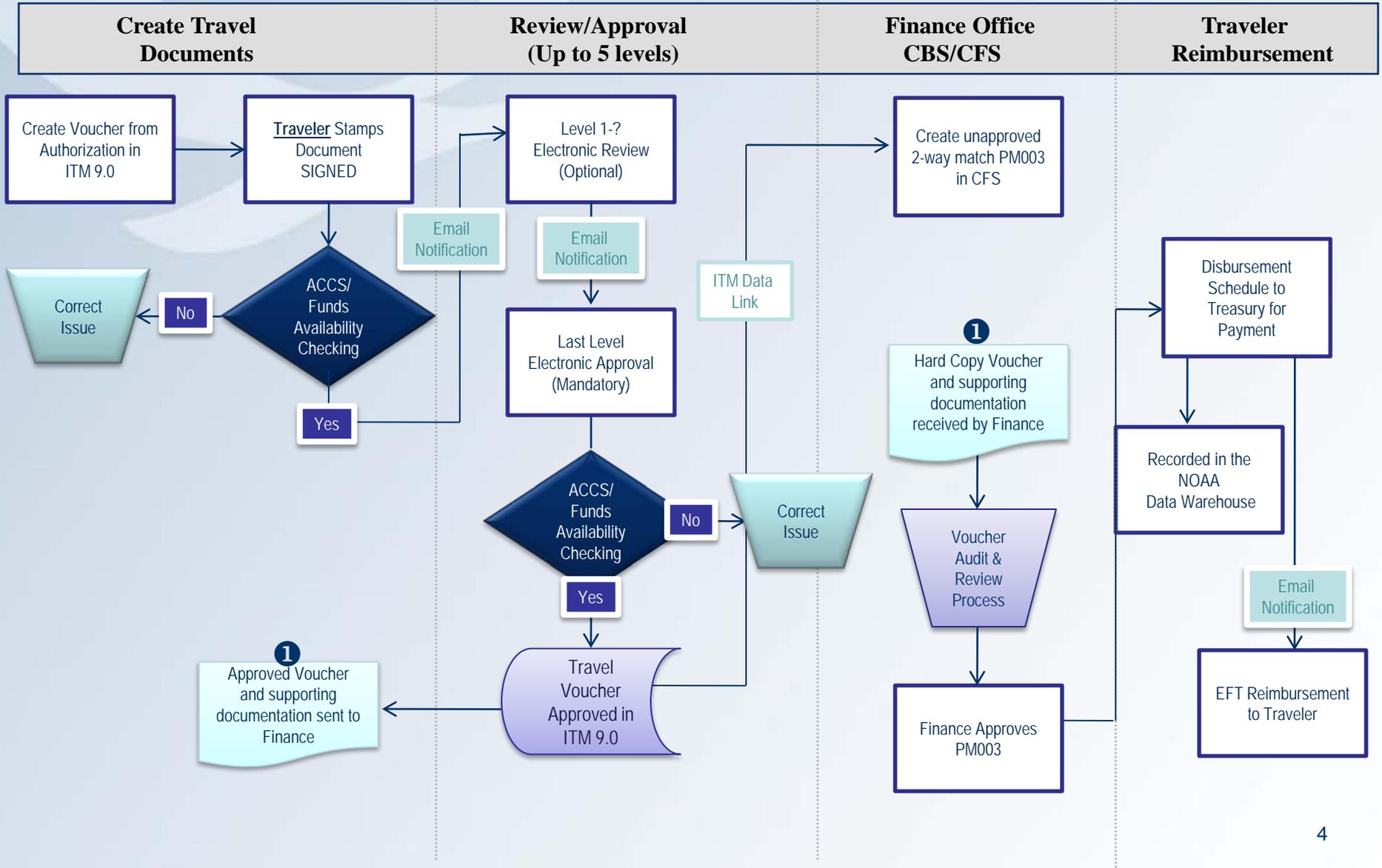
ITM 9.0 Process – Travel Authorization NOAA & BIS Employees



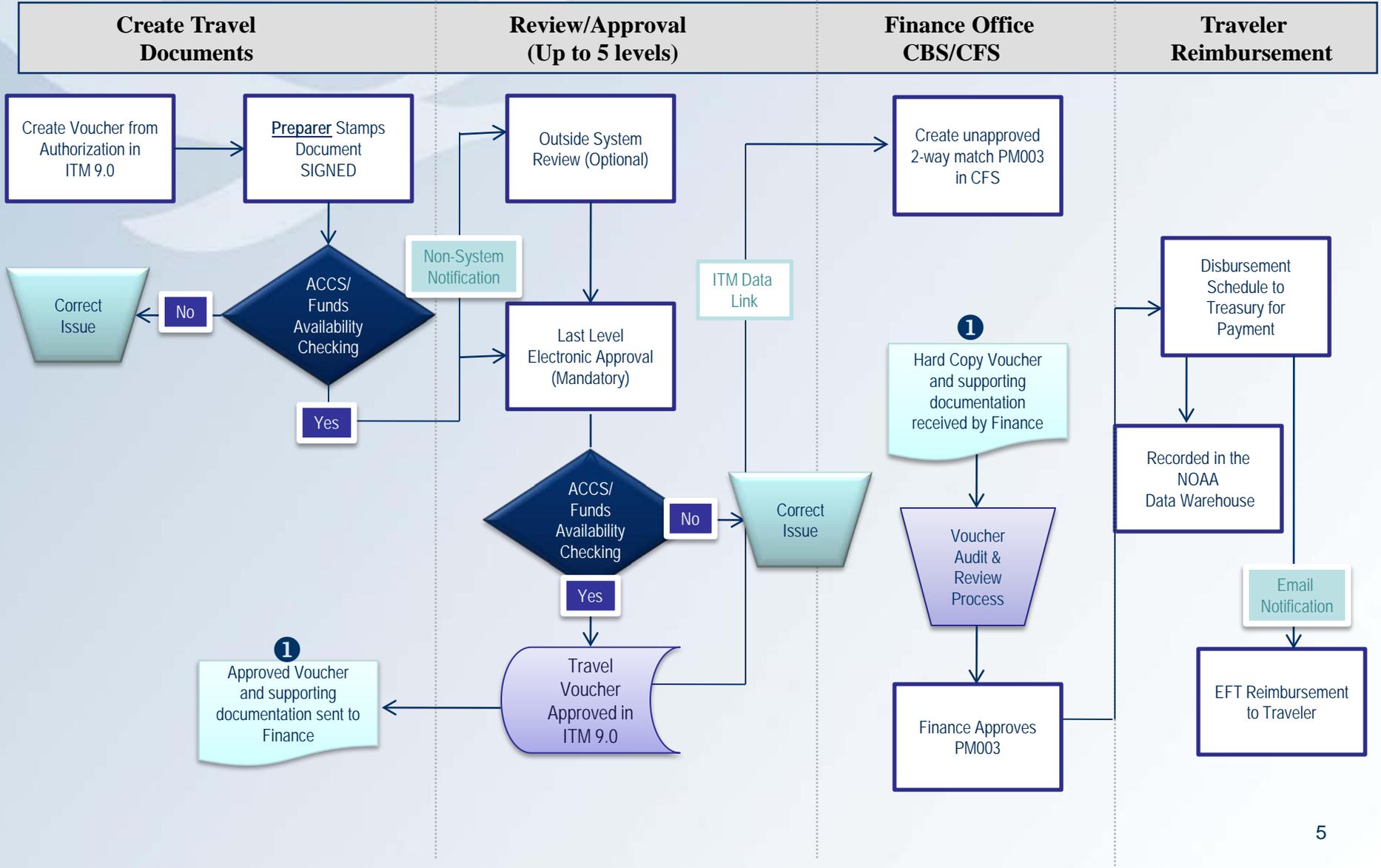
ITM 9.0 Process – Travel Authorization Excepted Travelers



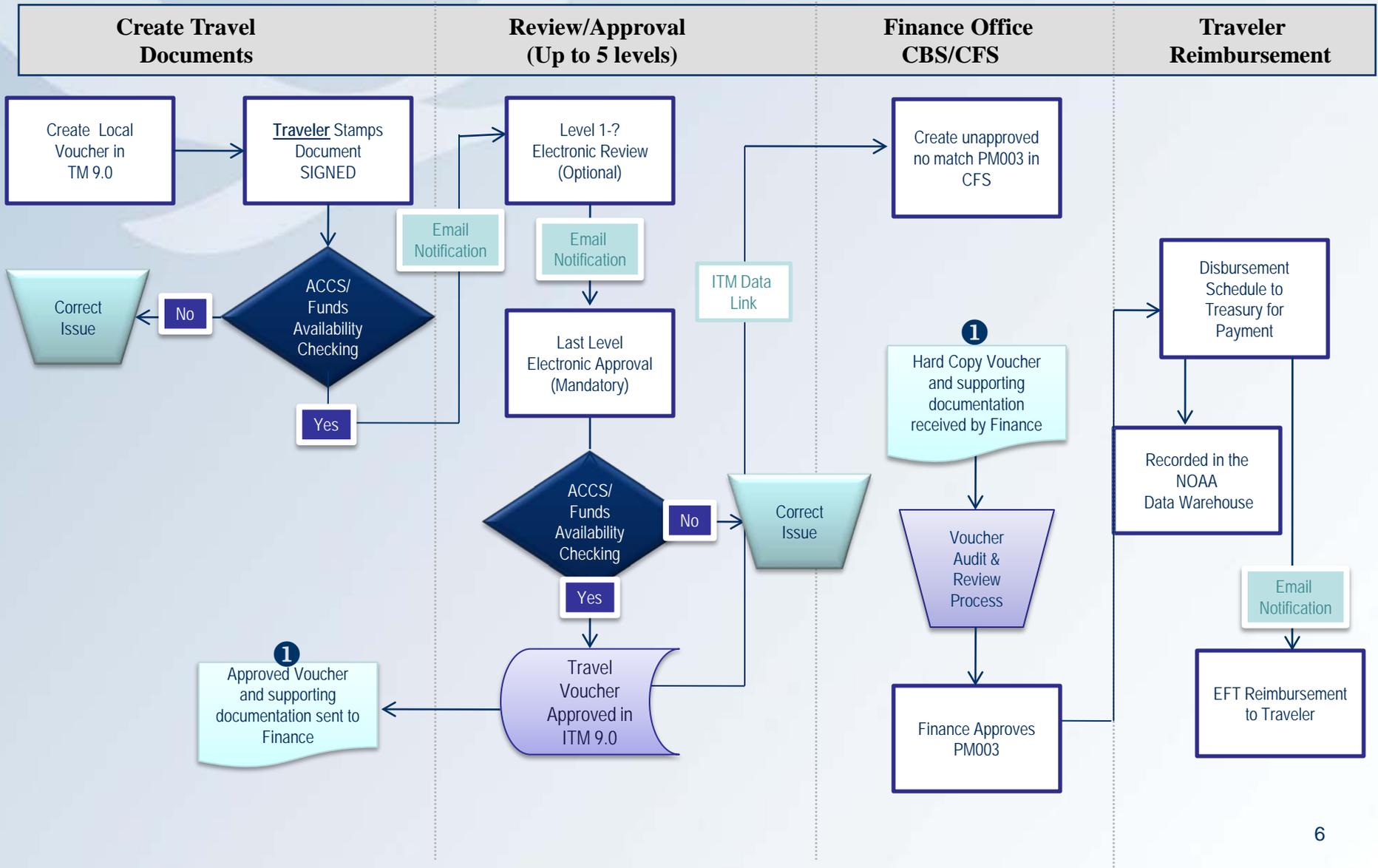
ITM 9.0 Process – Travel Voucher (2-way match) NOAA & BIS Employees



ITM 9.0 Process – Travel Voucher (2-way match) Excepted Travelers



ITM 9.0 Process – Local Voucher (No Match) NOAA & BIS Employees



Electronic Routing – Things to Remember

- **Electronic Routing capability for NOAA & BIS wide**
 - Authorization approvals occurring electronically as of November 16, 2009
 - Voucher approvals are occurring by electronic routing in addition to signed paper documents
 - *Paper Reduction process currently underway*
 - *Hard Copy document still official document of record*
 - Electronic Routing is linked with email applications so that messages are automatically sent to reviewing/approving officials notifying them there are travel documents awaiting approval
 - *For Employees only*
 - Electronic Routing does not apply for Invitational Travelers or NWSEO Bargaining Unit Employees
 - *Preparers will electronically stamp the document signed on behalf of those travelers*
 - *Approving officials still have to manually approve both paper and electronic vouchers*
 - *Authorizations only electronically*

Electronic Routing – Things to Remember (Cont'd)

- **Electronic routing should mimic hard copy routing unless:**
 - **An employee is requested to travel for NOAA/BIS office other than their own**
 - **Funding Office signs Hard Copy/Sends Email – Employee's Office signs electronically**
 - **NOAA Travel Regulations (NTR) 301-2.1(e)**
 - **Employee traveling under different project codes**
 - **Handled the same as above**
 - **Employee's approving official(s) do not use ITM**
 - **Hard Copy signed by non ITM User(s) – modified routing chain set up for electronic signatures**
 - **NOAA Travel Regulations (NTR) 301-2.1(e)**

Routing Administrator Role

- Primary Purpose
 - To create routing lists for your office that enables the documents to be reviewed/approved by the appropriate people - ELECTRONICALLY
- Access
 - Requires FMC Travel Coordinator signature on User Access Request Form
 - Routing List Creation/Maintenance
 - Administration Module of ITM
 - Can have other roles besides Routing Administrator

Routing Administration

- System Limitation
 - ITM Database is segmented applying organizational hierarchy (ITM Organization Code)
 - Different than Org code structure in CBS/ACCS
 - Two (2) Levels of hierarchy
 - Level 1 – FFB designator (H or W)
 - *FFB Consolidation (2/8/10)*
 - Level 2 – First two levels of CBS Org code (FMC level)
 - *Examples: H-06-02, W-20-40*
 - *BIS – letter “B” would precede the first two levels of the CBS Org Code*
 - *Example: H-B40-01*

Routing Administration (cont'd)

- **Routing Administrators role/ITM Org Access**
 - Can not administer routing maintenance across FMC's or servicing Finance Branches
 - Limited to only their ITM Org Code
 - Example: Routing Admin ITM Org Access is H-06-02
 - Establish routing list for only ITM H-06-02 and any employees falling with the same ITM Org Access
- **FFB Consolidation**
 - Will see more routing lists & travelers in your ITM Org
 - Only touch those lists & travelers that you are responsible for in your office!

Routing Lists

- Designated to facilitate electronic review and approval of travel documents
 - User Record & Electronic Signature Needed
 - Routing Lists need to be created
 - Routing Signatures (Review/Approval)
 - Routing List must be assigned to the traveler
- Routing Review/Approval Chain Setup dependent upon business and travel policies
- Each level of review/approval chain needs to contain:
 - Primary
 - Alternate
 - Alternate must be same level as primary
- When documents routed, electronic notifications sent to all people designated
 - Document stays in review queue of each person at given level until action is taken by one of them
- Once first level of review has taken place the document moves to the next level

Routing Lists (Cont'd)

- **Considerations in setting up a list:**
 - Can same routing information be applied to multiple travelers OR is different routing needed for various travelers?
 - Is the review/approve process the same for all types of travel documents OR are there different people involved depending upon the type of travel document?
 - Is the review/approval process the same for all travel conditions OR are there different people involved depending upon the travel condition?

Routing List Steps

- Create a Routing List Name
- Add Signatures (Reviewers/Approvers) to the Routing List
- Add Travelers to the Routing List

Create Routing List Name

- **Hints & Tips:**
 - **Maximum of 8 characters**
 - Suggestion – use 7 or less to give option for a suffix character (a, b, c, etc)
 - **Do not use individual's names**
 - Not a simple process to change a routing list name
 - **FFB Consolidation - you will see more routing lists**
 - Please only select those routing lists that belong to your office.

Routing List Name Screenshot

Routing Lists

 **Quick Tip**
Add new, modify or delete existing routing lists. Routing lists can be defined for each organization. [more](#)

For this Page you can:
Add Routing List
Preview Routing Lists
Cancel Selection

Search Criteria **Copy Routing List**

Organization  **Search** From Name **Copy**

Routing List To Organization 

To Name

Routing List

Search Results [Prev 40](#) [Next 40](#)

Edit	Delete	Organization	Routing List
		H-20-01	DELEG1
		H-20-01	DELEG2
		H-20-01	DELEG2-1

Save **Clear**

Routing List Details

Routing List Name 

Organization 

Routing List Signatures

- Based on NOAA Travel Regulations (NTR) 301-2.5
 - Explains what title from each office is allowed to approve each type of travel
 - Coding in place behind the scenes in the system coded to organization and types of travel based off the NTR
 - ITM 9.0 Conditional Routing Template
 - <http://www.corporateservices.noaa.gov/~cbs/travel.htm>
- Additional requirement for foreign travel authorizations
 - NOAA Travel Office (NTO) to be part of the routing list
 - Added to the list PRIOR to the final approval levels

Routing List Signatures Pieces

- **DOC TYPE**
 - Represents the types of documents found in Travel Manager
 - ALL = All Document Types
 - TA = Travel Authorization
 - TV = Travel Voucher
 - RECLAIM = Reclaim Voucher
 - LV = Local Vouchers
 - If broken out by document type must use all of the document type
- **SIGNATURE NAME**
 - The person assigned to this level, status, and document type
 - Not limited to the ITM-Organization Code
 - May search on anyone contained in Travel Manager

Routing List Signatures Pieces (Cont'd)

- **DOC STATUS**
 - Represents the stamp being assigned to the document
 - REVIEWED= For anyone that needs to review the document
 - PROCESSED = For the NOAA Travel Office (NTO) ONLY
 - APPROVED = For the person who is the final approval of the document
 - Can only be one approval in the system
 - Supervisor could be a reviewer for one type of travel and an approver for another
 - Other statuses shown in drop-down but not used

Routing List Signatures Pieces (Cont'd)

- **PROCESS NAME**
 - Represents the level of the official who has the authority by NOAA Travel Regulations (NTR) 301-2.5 to approve different types of travel
 - DOC NONDELEGATED = Highest Level (i.e. Executive)
 - DOC DELEGATED = Next Highest Level (i.e. Director)
 - DOC REDELEGATED = Lowest Level (i.e. Supervisor)
 - NTO FOREIGN = For the NOAA Travel Office
 - Some offices have different “levels” of approval (ITM 9.0 Conditional Routing Template)
 - Example – Actual Expenses
 - One office has at NONDELEGATED approval level
 - One office has at DELEGATED approval level
 - Other Process Names shown in drop-down but should not be used
 - Coding done behind the system that routes appropriately

Routing List Signatures Pieces (Cont'd)

- **LEVEL**
 - Represents where this review/approval person falls within the list
 - Approvals should always be the last level
 - System knows to skip levels listed in the routing list that are not associated to that specific travel document

Creating Routing List Signatures

- Hints & Tips
 - Plan your primary reviewers & approvers first on paper
 - Adding their alternates is easy
 - If one of the PROCESS NAMES is broken out – must use all of them
 - If an Executive Level person sees all travel may leave the PROCESS NAME blank
 - Reminder: NOAA Travel Office to be placed in the level prior to your approvals
 - If any of the DOC TYPES is broken out – must use all of them
 - Better if you can to use DOC TYPE of **ALL**
 - The same person with a different PROCESS NAME, but the same DOC TYPE & DOCUMENT STATUS can not be at the same LEVEL
 - System sees it as a duplicate record
 - Must be at a LEVEL before or after

Routing List Signatures - Details

Screenshot

Signature Details



Quick Tip

Update signature details for this routing list entry. Each entry indicates the document type, who will sign the document, what status code will be stamped on the document, the order or level that the document will be routed after it is signed, and any conditional process that is executed to determine whether to include this signature in the routing list on a document. [more](#)

For this Page you can:

Save Signature Updates

Clear Updates

Close without Saving Updates

Signature Details

Document Type	(All) ▼		
Signature Name ⓘ	Pauline K. Garcia	Signature	Role
Status ⓘ	APPROVED ▼		
Process Name	DOC REDELEGATED ▼		
Level ⓘ	6		

Record Last Updated

User ID

Date

Time

Routing List Signatures Screenshot

Signatures in Routing List IAOP



Quick Tip

Add new, modify or delete an existing routing list entry. [more](#)

For this Page you can:

Add Signature

Maintain Travelers

Back

Signature List

Click on an entry to select it

Search Results

[Prev 40](#) [Next 40](#)

Edit	Delete	Copy	Doc Type	VNum	Document Status	Level	Signature Name	Role Org	Process Name
			All	0006-00040	REVIEWED	1	Jon O. Striver		
			All	0006-00019	REVIEWED	1	Laura S. Goldstein		
			All	0006-00037	REVIEWED	2	Parke L. Brown		DOC DELEGATED
			All	0006-00011	REVIEWED	2	Pauline K. Garcia		DOC DELEGATED
			All	0006-00037	REVIEWED	3	Parke L. Brown		DOC NONDELEGATED
			All	0006-00011	REVIEWED	3	Pauline K. Garcia		DOC NONDELEGATED
			All	0006-00035	REVIEWED	4	Evangeline Fallan		DOC NONDELEGATED
			All	0006-00029	REVIEWED	4	William D. Graham		DOC NONDELEGATED
			All	0000-61114	PROCESSED	5	Chasity Donaldson		NTO FOREIGN
			All	0000-02827	PROCESSED	5	Rachael Wivell		NTO FOREIGN
			All	0006-00016	APPROVED	6	Betsy P. Durant		DOC NONDELEGATED
			All	0006-00035	APPROVED	6	Evangeline Fallan		DOC DELEGATED
			All	0006-00013	APPROVED	6	Mike M. Papadakis		DOC NONDELEGATED
			All	0006-00037	APPROVED	6	Parke L. Brown		DOC REDELEGATED
			All	0006-00011	APPROVED	6	Pauline K. Garcia		DOC REDELEGATED
			All	0006-00029	APPROVED	6	William D. Graham		DOC DELEGATED

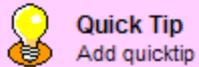
Add Travelers to the Routing List

- **Hints & Tips**

- Best to search using Last Name or Vendor Number
- Verify the individual does not already have a routing list
 - Listed on the right
- Traveler can only be associated to one routing list
 - Should be their main or “home” routing
 - Can be changed on specific documents if needed
- FFB Consolidation – you will see more travelers listed
 - Please only select those travelers that belong to your office/list

Travelers Screenshot

Add Travelers to Routing List IAOP



Quick Tip
Add quicktip

For this Page you can:

Add Travelers

Search Criteria

Last Name

VNum

Travelers List

Search Results

[Prev 40](#) [Next 40](#)

Add	Name	VNum	Organization	Routing
<input type="checkbox"/>	Rubis,Therese. A	0006-00001	H-20-01	IAOP
<input type="checkbox"/>	Davis,Karen. B	0006-00002	H-20-01	IAOP
<input type="checkbox"/>	Wenther,Scott. C	0006-00003	H-20-01	IAOP
<input type="checkbox"/>	Doran,Chris. D	0006-00004	H-20-01	
<input type="checkbox"/>	Holder,Janet. E	0006-00005	H-20-01	
<input type="checkbox"/>	Mathis,Jeff. F	0006-00006	H-20-01	
<input type="checkbox"/>	Kallsan,Pat. G	0006-00007	H-20-01	
<input type="checkbox"/>	Cropp,Tim. H	0006-00008	H-20-01	
<input type="checkbox"/>	Thorton,Charlene. I	0006-00009	H-20-01	
<input type="checkbox"/>	Bak,Darren. J	0006-00010	H-20-01	
	Garcia,Pauline. K	0006-00011	H-20-01	IAOPSUP
<input type="checkbox"/>	Spennelli,Anthony. L	0006-00012	H-20-01	
	Papadakis,Mike. M	0006-00013	H-20-01	
<input type="checkbox"/>	Gutschow,David. N	0006-00014	H-20-01	
<input type="checkbox"/>	Lombardi,Anne. O	0006-00015	H-20-01	

NOAA Client Services Help Desk Support

- Functional/Technical Support for CBS Applications
 - Budget Operating Plans (BOP)
 - Reimbursable Agreements
 - SLTs & DLAs
 - Data Warehouse/Discoverer
 - Commerce Purchase Card System (CPCS)
 - Travel
 - C.Request/C.Buy
- User Account requests, JAVA/JInitiator, etc.
- FSD/CBS Web Site www.corporateservices.noaa.gov/cbs
 - Click on Help Desk link for additional info, phone numbers, etc.
 - Email: ClientServices@noaa.gov
 - Phone #: 301-444-3400
 - *Option #2 - Travel*
 - Fax/Server #: 301-444-3401



Questions & Discussion

Why...

What about...

Will this...

Who...