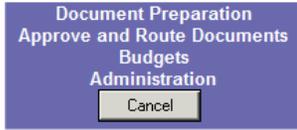
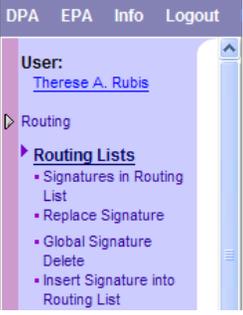
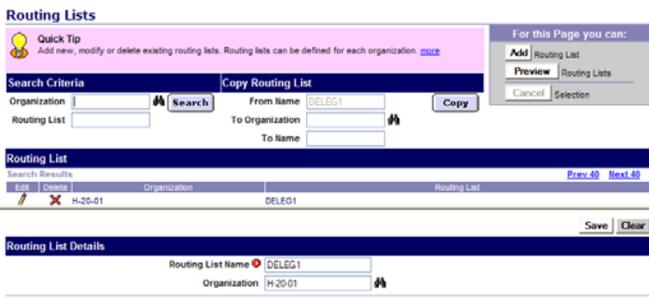
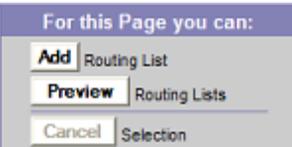
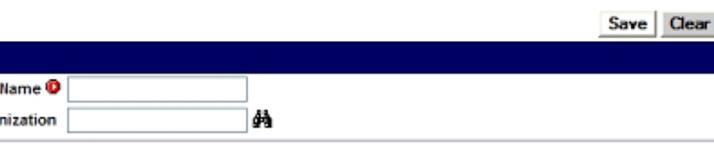


Routing Administration in ITM 9.0

Step	Action
1a	<ul style="list-style-type: none"> ➤ Open Internet Explorer ➤ Go to the following URL: https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w
1b	<ul style="list-style-type: none"> ➤ Enter your Username & Password on the Login Page 
1c	<ul style="list-style-type: none"> ➤ Click on Administration 
<p>Notes:</p> <ul style="list-style-type: none"> ✓ If you press ENTER after entering your Username and Password, the system will automatically go into the Document Preparation module. You will then need to log out of the system and try again or open a new window/tab. ✓ If this is the first time logging into the system, you may be prompted to change your Password and/or enter a Signature Pin. 	
2	<p>From the Menu Toolbar</p> <ul style="list-style-type: none"> ➤ Click on EPA 

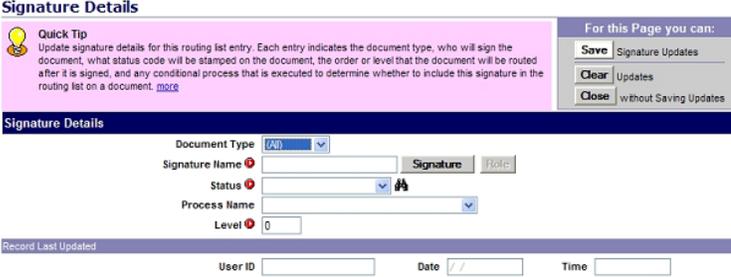
Routing Administration in ITM 9.0

Step	Action	
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ Upon logging into the Administration module, depending upon your role (Group Admin, Routing Admin or both) your Menu Toolbar may list different options. ✓ For those with the Routing Administrator role only, you will not need to click on EPA in the Menu Toolbar. It is the default option for you. 	
3	<p>From the Navigation Tree</p> <ul style="list-style-type: none"> ➤ Click on Routing ➤ Click on Routing Lists 	 <p>The screenshot shows a navigation tree with a menu expanded under 'Routing'. The expanded menu includes 'Routing Lists', 'Signatures in Routing List', 'Replace Signature', 'Global Signature Delete', and 'Insert Signature into Routing List'. The 'Routing Lists' item is highlighted.</p>
3a	<p>The Routing Lists screen appears</p>	 <p>The screenshot shows the 'Routing Lists' screen. It includes a 'Quick Tip' about adding, modifying, or deleting routing lists. There are search criteria fields for Organization, Routing List, From Name, To Organization, and To Name. A 'Copy Routing List' button is present. Below the search criteria is a table of search results with columns for Edit, Delete, Organization, and Routing List. The 'Routing List Details' section is also visible.</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ This is a split screen. ✓ Only those routing lists in your ITM Organization Code will appear. ✓ Due to the FFB Reorganization you will see more lists. <ul style="list-style-type: none"> ○ Please do not modify a list that is <u>not</u> your responsibility.
4	<p>Click on the Add (Routing List) button found in the upper right corner to create a new routing list</p>	 <p>The screenshot shows a menu titled 'For this Page you can:' with three options: 'Add Routing List', 'Preview Routing Lists', and 'Cancel Selection'. The 'Add Routing List' button is highlighted.</p>
4a	<p>The Routing Details area appears with blank fields.</p>	 <p>The screenshot shows the 'Routing List Details' form. It has two input fields: 'Routing List Name' and 'Organization'. There are 'Save' and 'Clear' buttons at the top right of the form.</p>

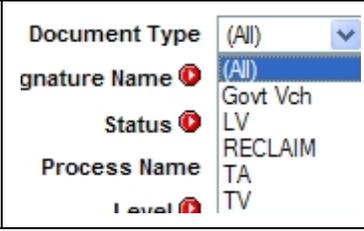
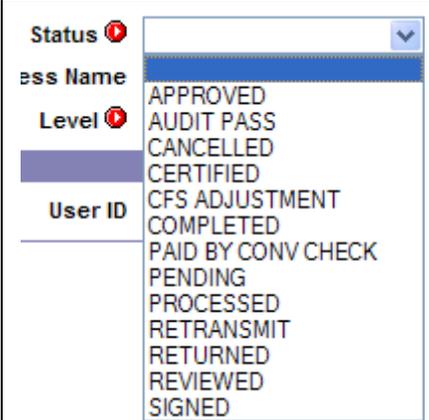
Routing Administration in ITM 9.0

Step	Action																											
4b	<p>In the Routing Details area:</p> <ul style="list-style-type: none"> ➤ Enter Routing List Name ➤ Enter Organization ➤ Click Save <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The routing list name can only be 8 characters long.</i> ✓ <i>The Organization can be typed in, copied/pasted, or the lookup icon can be utilized.</i> ✓ <i>The screen will refresh and show the newly added routing list at the top of the listing.</i> 																											
5	<p>From the Navigation Tree</p> <ul style="list-style-type: none"> ➤ Click on Signatures in Routing List 																											
5a	<p>The Signatures in Routing List screen appears</p>  <p>Signatures in Routing List</p> <p>Quick Tip Click the routing list name to display all entries and signatures in the routing list. more</p> <p>Search Criteria</p> <p>Organization: <input type="text"/> <input type="button" value="Search"/></p> <p>Routing List: <input type="text"/></p> <p>Routing List Click on an entry to select it</p> <table border="1"> <thead> <tr> <th>Search Results</th> <th>Organization</th> <th>Routing List</th> </tr> </thead> <tbody> <tr><td>H-20-01</td><td></td><td>DELEG1</td></tr> <tr><td>H-20-01</td><td></td><td>DELEG2</td></tr> <tr><td>H-20-01</td><td></td><td>DELEG2-1</td></tr> <tr><td>H-20-01</td><td></td><td>DEMO</td></tr> <tr><td>H-20-01</td><td></td><td>DOCTP1</td></tr> <tr><td>H-20-01</td><td></td><td>DOCTP1-1</td></tr> <tr><td>H-20-01</td><td></td><td>DOCTP1-2</td></tr> <tr><td>H-20-01</td><td></td><td>DOCTP2</td></tr> </tbody> </table> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Only 40 Routing List names will appear per screen. You can use the Prev 40 and Next 40 links to navigate through the lists.</i> ✓ <i>Due to the FFB consolidation, you will see more lists; only select those that you are responsible for!</i> ✓ <i>We suggest searching on the name of your list to ensure you are opening the correct list.</i> 	Search Results	Organization	Routing List	H-20-01		DELEG1	H-20-01		DELEG2	H-20-01		DELEG2-1	H-20-01		DEMO	H-20-01		DOCTP1	H-20-01		DOCTP1-1	H-20-01		DOCTP1-2	H-20-01		DOCTP2
Search Results	Organization	Routing List																										
H-20-01		DELEG1																										
H-20-01		DELEG2																										
H-20-01		DELEG2-1																										
H-20-01		DEMO																										
H-20-01		DOCTP1																										
H-20-01		DOCTP1-1																										
H-20-01		DOCTP1-2																										
H-20-01		DOCTP2																										

Routing Administration in ITM 9.0

Step	Action	
5b	<p>In the Search Criteria area:</p> <ul style="list-style-type: none"> ➤ Enter Routing List Name ➤ Click Search <p>Any list(s) that has the criteria entered will appear below.</p> <ul style="list-style-type: none"> ➤ Click on the Routing List Name 	
6	<p>The Signatures in Routing List (NAME) screen appears</p>	
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ Only 40 Signature names will appear per screen ✓ If this is a new routing list, no signatures will appear the first time you enter this screen. ✓ This is also the area where you would make changes to the signature names if needed. 	
6a	<p>Click the Add (Signature) button in the upper right corner to add the reviewer(s)/approver(s) to the routing list</p>	
7	<p>The Signatures Details screen appears</p>	

Routing Administration in ITM 9.0

Step	Action	
7a	Select the Document Type	
7a1	<p>ALL = All Travel Documents Govt Vch = Previous ITM Version Vouchers (DO NOT USE) LV = Local Voucher RECLAIM = Reclaim Vouchers TA = Travel Authorization TV = Travel Vouchers</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ We suggest using ALL, unless different people will be reviewing different document types. ✓ If you use one document type (TA), you must use them all (TA, TV, RECLAIM, LV) ✓ Remember, the system knows to route different document types to the appropriate individuals using the standard features. For example, NTO Office set at all, knows to send the foreign Authorizations to them, not the vouchers. The vouchers will go to the lowest level of approval as long as it's not a post-approval voucher. 	
7b	Select the Status	
7b1	<p>APPROVED = For those approving documents REVIEWED = For those reviewing documents PROCESSED = For the NOAA Travel Office ONLY</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ Only use the three listed above. ✓ The other statuses listed are for other functions within the system – not routing. 	

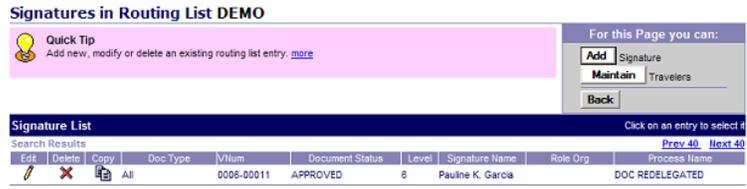
Routing Administration in ITM 9.0

Step	Action	
7c	Select the Process Name	<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> <p>Process Name <input style="width: 100%;" type="text"/></p> <p>Level <input style="width: 100%;" type="text"/></p> <p>User ID <input style="width: 100%;" type="text"/></p> </div> <div style="border: 1px solid gray; padding: 5px;"> <div style="background-color: #4a7ebb; color: white; padding: 2px;">▼</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC ACCOMPANIED</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC ACTUAL EXPENSES</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC BLANKET</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC CONFERENCE LODGING</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC DELEGATED</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC FOREIGN</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC INVITATIONAL</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC NON-FED. OR FOREIGN FUNDED</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC NON-WHTI</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC NONDELEGATED</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC OMAO CIVILIAN-DELEG</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC OMAO CIVILIAN-NONDELEG</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC OMAO COMMISSIONED-DELEG</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC OMAO COMMISSIONED-NONDELEG</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC PREMIUM CLASS</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC REDELEGATED</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">DOC WHTI</div> <div style="background-color: #4a7ebb; color: white; padding: 2px;">NTO FOREIGN</div> </div> </div>
7c1	<p>DOC NONDELEGATED process name is the highest managerial level possible that may actually authorize ALL official travel.</p> <p>DOC DELEGATED process name allows some of the more frequent “special” travel conditions to be authorized at a slightly lower level of management than those listed in the DOC NONDELEGATED level.</p> <p>DOC REDELEGATED process name handles a lower level than what was designated at the DOC DELEGATED level.</p> <p>NTO FOREIGN process name was set up for the NOAA Travel Office in order for them to be added to the routing list for foreign travel at the level prior to the first approval in the list.</p> <p>The Process Name may be “BLANK” if the person is reviewing all travel conditions or if they are an approver that can approve all types of travel.</p> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p>Notes:</p> <ul style="list-style-type: none"> ✓ If you use one, you must use all three. (NONDELEGATED, DELEGATED, REDELEGATED) ✓ NTO FOREIGN is ONLY for the NOAA Travel Office ✓ Other Process Names listed should not be used. They have been built into the standard process names, like NONDELEGATED. This tells the system for those specific documents, like DOC FOREIGN, to go to the NONDELEGATED person. </div>	
7d	Enter the Level	<p>Level <input style="width: 100%;" type="text" value="0"/></p>

Routing Administration in ITM 9.0

Step	Action																																																																
7d1	<p>The LEVEL represents where the reviewer/approver falls within the routing list. In other words, the level is the order in which each signature receives the document.</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The default is zero (0). Zero should NEVER be used in your routing list. The lowest level should always be one (1).</i> ✓ <i>There is no limit to the number of levels to a routing list.</i> ✓ <i>The approvers should always be at the last, or highest, level of the routing list.</i> 																																																																
7e	<p>Click the Signature button</p> <p style="text-align: right;">Signature Name <input type="text"/> <input type="button" value="Signature"/> <input type="button" value="Role"/></p>																																																																
7e1	<p>A new window will open showing people only within your ITM Org Code, however, you are not limited by your Org code when searching for signatures.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Signature Lookup - Windows Internet Explorer</p> <p>Enter Search Criteria</p> <p>Organization <input type="text"/> <input type="button" value="Search"/></p> <p>Name <input type="text"/> <input type="button" value="Cancel"/></p> <p>VNum <input type="text"/></p> <p>Search Results Click on an entry to select it</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Organization</th> <th style="text-align: left;">VNum</th> <th style="text-align: left;">Signature Name</th> <th style="text-align: left;">Effective Date</th> </tr> </thead> <tbody> <tr><td>H-20-01</td><td>0006-00001</td><td>Therese A. Rubis</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00002</td><td>Karen B. Davis</td><td>04/08/10</td></tr> <tr><td>H-20-01</td><td>0006-00003</td><td>Scott C. Wientner</td><td>07/19/10</td></tr> <tr><td>H-20-01</td><td>0006-00004</td><td>Chris D. Doran</td><td>07/19/10</td></tr> <tr><td>H-20-01</td><td>0006-00005</td><td>Janet E. Holder</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00006</td><td>Jeff F. Mathis</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00007</td><td>Pat G. Kalkan</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00008</td><td>Tim H. Cropp</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00009</td><td>Charlene I. Thornton</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00010</td><td>Darren J. Bak</td><td>07/15/10</td></tr> <tr><td>H-20-01</td><td>0006-00011</td><td>Pauline K. Garcia</td><td>04/14/10</td></tr> <tr><td>H-20-01</td><td>0006-00012</td><td>Anthony L. Spenelli</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00013</td><td>Mike M. Papadakis</td><td>04/14/10</td></tr> <tr><td>H-20-01</td><td>0006-00014</td><td>David N. Gutschow</td><td>03/31/10</td></tr> <tr><td>H-20-01</td><td>0006-00015</td><td>Anne Q. Lombardi</td><td>03/31/10</td></tr> </tbody> </table> </div> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>A Routing Administrator is not limited to just their ITM Org Code in order to add people to the list.</i> ✓ <i>A Routing Administrator can search using Organization, First Name, Vendor Number or a combination of the three to look up someone.</i> 	Organization	VNum	Signature Name	Effective Date	H-20-01	0006-00001	Therese A. Rubis	03/31/10	H-20-01	0006-00002	Karen B. Davis	04/08/10	H-20-01	0006-00003	Scott C. Wientner	07/19/10	H-20-01	0006-00004	Chris D. Doran	07/19/10	H-20-01	0006-00005	Janet E. Holder	03/31/10	H-20-01	0006-00006	Jeff F. Mathis	03/31/10	H-20-01	0006-00007	Pat G. Kalkan	03/31/10	H-20-01	0006-00008	Tim H. Cropp	03/31/10	H-20-01	0006-00009	Charlene I. Thornton	03/31/10	H-20-01	0006-00010	Darren J. Bak	07/15/10	H-20-01	0006-00011	Pauline K. Garcia	04/14/10	H-20-01	0006-00012	Anthony L. Spenelli	03/31/10	H-20-01	0006-00013	Mike M. Papadakis	04/14/10	H-20-01	0006-00014	David N. Gutschow	03/31/10	H-20-01	0006-00015	Anne Q. Lombardi	03/31/10
Organization	VNum	Signature Name	Effective Date																																																														
H-20-01	0006-00001	Therese A. Rubis	03/31/10																																																														
H-20-01	0006-00002	Karen B. Davis	04/08/10																																																														
H-20-01	0006-00003	Scott C. Wientner	07/19/10																																																														
H-20-01	0006-00004	Chris D. Doran	07/19/10																																																														
H-20-01	0006-00005	Janet E. Holder	03/31/10																																																														
H-20-01	0006-00006	Jeff F. Mathis	03/31/10																																																														
H-20-01	0006-00007	Pat G. Kalkan	03/31/10																																																														
H-20-01	0006-00008	Tim H. Cropp	03/31/10																																																														
H-20-01	0006-00009	Charlene I. Thornton	03/31/10																																																														
H-20-01	0006-00010	Darren J. Bak	07/15/10																																																														
H-20-01	0006-00011	Pauline K. Garcia	04/14/10																																																														
H-20-01	0006-00012	Anthony L. Spenelli	03/31/10																																																														
H-20-01	0006-00013	Mike M. Papadakis	04/14/10																																																														
H-20-01	0006-00014	David N. Gutschow	03/31/10																																																														
H-20-01	0006-00015	Anne Q. Lombardi	03/31/10																																																														
7e2	Once the name has been found, click on the Signature Name link.																																																																

Routing Administration in ITM 9.0

Step	Action
7f	<p>Once all fields have been entered, click Save (<i>Signature Updates</i>) button</p> 
8	<p>The Signatures in Routing List (NAME) screen appears with the new information added.</p> 
9	Repeat the steps 6a through 7f to add all of the reviewers/approvers to the routing list.
10	<p>To add travelers to the routing list, click on Maintain (<i>Travelers</i>) button.</p> 
11	<p>The Add Travelers to Routing List (NAME) screen appears.</p> 
11a	<p>Select the person to be associated to this list:</p> <ul style="list-style-type: none"> ➤ Check the checkbox next to the name of the traveler ➤ Click Add (<i>Travelers</i>) button

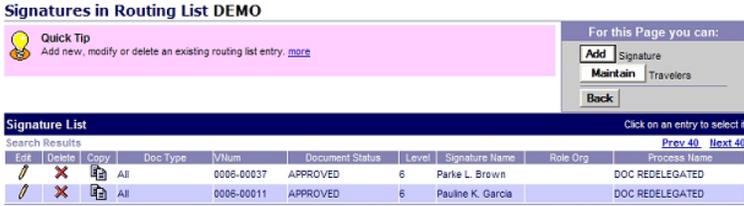
Routing Administration in ITM 9.0

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ All travelers will be listed. This includes employees, invitational travelers, bargaining unit employees, and reviewers/approvers in the same ITM Organization Code. ✓ <u>DO NOT</u> select any invitational or NWSEO (NWS) bargaining unit employee. ✓ Verify the person does not already have a Routing List associated to them in the far right column. If they do, contact the Routing Administrator of that list to find out why the traveler is associated to their list and if they can be moved. ✓ Reviewers/Approvers, within the same ITM Org Code, associated to the Routing List will not have a checkbox next to their name. This is because they are not to review/approve their own documents. ✓ Only forty (40) individuals will be shown per screen. Use the search capability to look up a traveler by Last Name or Vendor Number.
12	Repeat step 11 to add all travelers to the Routing List.
13	<div style="display: flex; align-items: center;"> <div style="flex: 1;"> <p>When finished:</p> <ul style="list-style-type: none"> ➤ Click Logout in the Menu Toolbar. </div> <div style="flex: 1; border: 1px solid black; background-color: #4a5568; color: white; padding: 5px; text-align: center;"> DPA EPA Info Logout Help </div> </div>

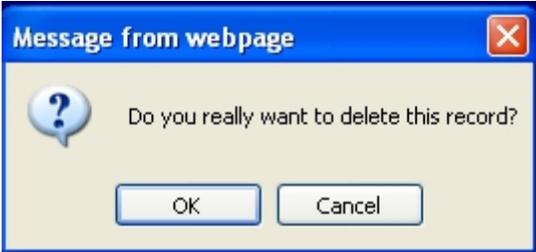
To Copy a Signature Line

Step	Action
1	<p>To copy a signature line:</p> <p>Click the copy () icon on the signature line you wish to copy</p>
1a	<div style="display: flex; align-items: flex-start;"> <div style="flex: 1; padding-right: 10px;"> <p>The Signatures Details screen appears with all information filled out from the line that you copied from.</p> </div> <div style="flex: 2;">  </div> </div>

Routing Administration in ITM 9.0

Step	Action
1b	<ul style="list-style-type: none"> ➤ Make the changes necessary to this record ➤ Click Save
1c	<p>The Signatures in Routing List (NAME) screen appears with the new information added.</p> 

To Delete a Signature Line

Step	Action
1	<p>To delete a signature line:</p> <p>Click the delete () icon on the signature line you wish to delete</p>
1a	<p>A window prompt will appear.</p> <ul style="list-style-type: none"> ➤ Click OK 
1b	<p>The Signatures in Routing List (NAME) screen appears without that signature line.</p> 

Routing Administration in ITM 9.0

To Edit a Signature Line

Step	Action																				
1	<p>To edit a signature line:</p> <p>Click the edit () icon on the signature line you wish to change</p>																				
1a	<p>The Signatures Details screen appears with all information filled out from the line you selected to edit.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Signature Details</p> <p> 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</p> <p>Signature Details</p> <p>Document Type: <input type="text" value="IAN"/> <input type="button" value="Signature"/> <input type="button" value="Role"/></p> <p>Signature Name: <input type="text" value="Pauline K. Garcia"/></p> <p>Status: <input type="text" value="APPROVED"/> <input type="button" value="Add"/></p> <p>Process Name: <input type="text" value="DOC REDELEGATED"/></p> <p>Level: <input type="text" value="6"/></p> <hr/> <p>Record Last Updated</p> <p>User ID: <input type="text" value="hub0001"/> Date: <input type="text" value="09/01/2010"/> Time: <input type="text" value="12:15PM"/></p> </div>																				
1b	<ul style="list-style-type: none"> ➤ Make the changes necessary to this record ➤ Click Save 																				
1c	<p>The Signatures in Routing List (NAME) screen appears with the new information added.</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Signatures in Routing List DEMO</p> <p> Quick Tip Add new, modify or delete an existing routing list entry. more</p> <p>For this Page you can:</p> <p><input type="button" value="Add"/> Signature</p> <p><input type="button" value="Maintain"/> Travelers</p> <p><input type="button" value="Back"/></p> <hr/> <p>Signature List Click on an entry to select</p> <p>Search Results Prev 40 Next 40</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Edit</th> <th style="text-align: left;">Delete</th> <th style="text-align: left;">Copy</th> <th style="text-align: left;">Doc Type</th> <th style="text-align: left;">V/Num</th> <th style="text-align: left;">Document Status</th> <th style="text-align: left;">Level</th> <th style="text-align: left;">Signature Name</th> <th style="text-align: left;">Role Org</th> <th style="text-align: left;">Process Name</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"></td> <td style="text-align: center;"></td> <td style="text-align: center;"></td> <td>All</td> <td>0006-00011</td> <td>REVIEWED</td> <td>2</td> <td>Pauline K. Garcia</td> <td></td> <td>DOC NONDELEGATED</td> </tr> </tbody> </table> </div>	Edit	Delete	Copy	Doc Type	V/Num	Document Status	Level	Signature Name	Role Org	Process Name				All	0006-00011	REVIEWED	2	Pauline K. Garcia		DOC NONDELEGATED
Edit	Delete	Copy	Doc Type	V/Num	Document Status	Level	Signature Name	Role Org	Process Name												
			All	0006-00011	REVIEWED	2	Pauline K. Garcia		DOC NONDELEGATED												