



# NOAA CBS

## INTEGRATED TRAVEL MANAGER DISPATCH #3

### Electronic Routing in a Nutshell

Updated March 2010



**NOTE:** This dispatch is targeted to Travelers, Reviewers/Approvers and others who are looking for a general understanding of the routing process in the Integrated Travel Manager application. More detailed information targeted to Routing Administrators can be found in the [Integrated Travel Manager Dispatch #4 - Routing Administration - Approval Delegations](#)

This dispatch has been revised to reflect updated system changes as a result of the Routing Enforcement implementation. Revised sections of the Dispatch are marked as 'NEW.'

**NEW** **Effective April 12, 2010** - Travelers with a valid e-mail address assigned to their Traveler Information profile record will begin to receive e-mail notification upon approval of all document types (Authorizations, Vouchers, Reclaims and Local Vouchers). Group Administrators are advised to update the e-mail address for Invitational travelers with the e-mail address of the Group Administrator responsible for processing the Invitational traveler's document.

Travelers/Group Administrators should wait until approval confirmation receipt before forwarding hard copy documentation to their servicing Finance Office for payment. **Hard copy Travel Vouchers forwarded to the servicing Finance Office that have not obtained electronic approval in ITM will not be processed for payment.**

Note: Reference to "Excepted" employees within this documentation currently only applies to members covered by the NWSEO Bargaining Unit, with the exception of the General Counsel Office.



### What is Electronic Routing?

In short, electronic routing is the way in which documents systematically move through the system for review/approval signatures. It mimics the process in which hard copy documentation is currently required to route through an individual's organization for signatures; however with added benefits such as:

- Pre-audits
- E-mail notifications
- ACCS and Funds Validation
- Near real-time posting and confirmation of obligated funds



### How Does it Work?

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 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 traveler within their organization. Routing lists can be setup several ways:

- Simple - All travel documents repetitively route to the same individual(s).
- Complex - Certain conditions cause a traveler's document to re-route outside the normal process for additional and/or higher levels of review/approvals. This method is referred to as "**conditional routing.**"

Once routing has been assigned to a traveler, anytime a document is created and electronically stamped SIGNED, the routing process will initiate and documents will electronically route to officials based on how the traveler's routing list was created.

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 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.

As a document routes and electronic stamps (SIGNED, REVIEWED, APPROVED, etc...) are applied e-mail notifications will generate to the next person(s) within the traveler's approval routing chain, ultimately ending with an e-mail notification sent to the traveler upon approval. Routing lists rely on the e-mail addresses contained in the Traveler Profile record of the Reviewers, Approvers and Travelers in order to send notifications. **Therefore, it is important to ensure Government e-mail addresses are assigned to the Traveler Profile record of these individuals and are not left blank.**

## Where do I fit in the electronic routing process as a Group Administrator?

As a Group Administrator, your role in the electronic routing process will depend on the type of document and the traveler's status.



### • For Travel Authorizations

- If the traveler is a NOAA or BIS employee: Once the authorization is ready to be routed, the Group Administrator must electronically stamp the Travel Authorization SIGNED to initiate the routing process. As a result e-mail notifications will be sent to the first level of review and/or approval in the traveler's approval routing chain.
- If the traveler is an "Invitational" traveler or "Excepted" employee: Once the authorization is ready to be sent to the Approving Official, the Group Administrator must electronically stamp the Travel Authorization SIGNED to invoke all system edits, audits and funds checking processes, ensuring any errors contained on the authorization are resolved prior to the Approving Official taking action.

*Note: For "Invitational" travelers and "Excepted" employees, the Group Administrator will be responsible for **verbally** notifying the Approving Official when documents require action in Travel Manager.*

### • For Travel Vouchers

- If the traveler is a NOAA or BIS employee: The Group Administrator is not required to electronically stamp the voucher. The traveler **must** electronically stamp the Travel Voucher SIGNED to initiate the routing process. As a result e-mail notifications will be sent to the first level of review and/or approval in the traveler's approval routing chain.

*Note: An e-mail notification will not generate to the traveler informing them that they need to stamp their voucher SIGNED. If a Group Administrator is preparing the voucher on the employee's behalf, the Group Administrator **must verbally** notify the traveler to stamp the voucher SIGNED.*

- If the traveler is an "Invitational" traveler or "Excepted" employee: Once the voucher is ready to be sent to the Approving Official, the Group Administrator **must** electronically stamp the Travel Voucher SIGNED to invoke all system edits, audits and funds checking processes, ensuring any errors contained on the voucher are resolved prior to the Approving Official taking action.

*Note: For "Invitational" travelers and "Excepted" employees, the Group Administrator will be responsible for **verbally** notifying the Approving Official when documents require action in Travel Manager.*

## Where do I fit in the electronic routing process as a Traveler?

As a Traveler, your role in the electronic routing process will depend on the type of document.



### • For Travel Authorizations

Generally travelers do not play a role in the electronic routing process of a Travel Authorization unless they are the document preparer.

- If the traveler's authorization is prepared by a Group Administrator:

The traveler is not required to electronically stamp the authorization. All the work will be handled by the Group Administrator and Reviewing/Approving Officials.

- If the traveler's authorization is prepared by the traveler: Once the authorization is ready to be routed the traveler must electronically stamp the Travel Authorization SIGNED to initiate the routing process. As a result e-mail notifications will be sent to the first level of review and/or approval in the traveler's approval routing chain.

### • For Travel Vouchers

- If the traveler is a NOAA or BIS employee: Once the voucher is ready to be routed, the traveler must electronically stamp the Travel Voucher SIGNED to initiate the routing process. As a result e-mail notifications will be sent to the first level of review and/or approval in the traveler's approval routing chain. This applies no matter who the document preparer is.

*Note: An e-mail notification will not generate to the traveler informing them that they need to stamp their voucher SIGNED. If a Group Administrator is preparing the voucher on the employee's behalf, the Group Administrator must verbally notify the traveler to stamp the voucher SIGNED.*

- If the traveler is an "Invitational" traveler or "Excepted" employee: The traveler is not required to electronically stamp the voucher. All the work will be handled by the Group Administrator and Reviewing/Approving Officials. Group Administrators are responsible for ensuring Travel Vouchers are electronically approved by the Approving Official in a timely manner. Delays in the electronic approval process can potentially delay reimbursement and/or result in interest penalty due to the traveler.

*Note: For "Invitational" travelers and "Excepted" employees, the Group Administrator will be responsible for verbally notifying the Approving Official when documents require action in Travel Manager.*



## Where do I fit in the electronic routing process as a Reviewing or Approving Official?

For individuals included in an electronic approval routing chain (i.e., reviewing and/or approving officials) it's simple. If you receive a Travel Manager Correspondence e-mail notification or verbal notification from your Group Administrator, a traveler's document is awaiting you to take action. Officials within a routing chain should be mindful of the status expecting to be applied (i.e., Reviewed or Approved). In cases of conditional routing, an individual who would normally apply the APPROVED status may find the system requiring them to select REVIEWED instead as the document warrants a higher or additional level for the APPROVED process. For verification purposes, once routing is initiated the Document Routing block within the Document Status window displays the routing path indicating the Official, their Level within the routing process and the expected Status to be applied.

*Note: If an individual is setup in a routing list as a Reviewing or Approving Official and is not receiving e-mail notifications when expected, they should contact the NOAA Client Services Help Desk at (301) 444-3400 or [ClientServices@noaa.gov](mailto:ClientServices@noaa.gov) to verify their Traveler and/or User Profile record contains a valid e-mail entry.*

Approving Officials are responsible for ensuring they electronically APPROVE Travel Vouchers in a timely manner. Delays in electronic approval can potentially delay reimbursement and/or result in an interest penalty due to the traveler.

### What if my documents aren't routing as expected?

If a traveler, Group Administrator or Reviewing/Approving Official suspects documents are not routing through Travel Manager as expected they should contact their local Routing Administrator. Routing Administrators are responsible for ensuring routing lists are setup in compliance with the NOAA Travel Regulations and that documents route through the system accordingly.