

**Abbreviated Instructions for Reviewing/Approving
Employee's Documents in ITM 9.0**

Step	Action	Results
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 	The ITM 9.0 Login screen appears
1b	From the ITM 9.0 Login screen: <ul style="list-style-type: none"> ➤ Enter your Username & Password 	<i>Note: 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.</i>
1c	Click on Document Preparation	<i>Note: NOAA does not use Approve and Route Documents module in ITM.</i> The system will take you to the Home screen.
2	From the home screen do one of the following: <ul style="list-style-type: none"> ➤ Click on the Open Document Icon from the review queue ➤ Click on the More link in the <i>Review Area</i> or Review Documents link in the <i>Document Toolbar</i>. 	Open Document Icon will take you to step 4a More link or Review Documents link will take you to the Review Document screen (step 3).
3	From the Review Document screen: <ul style="list-style-type: none"> ➤ Click on the Open Document Icon from the review queue 	Open Document Icon will take you to step 4a
4a	If there have been revisions to the travel document, the Open Document Version screen appears. <ul style="list-style-type: none"> ➤ Click on the most recent adjustment/amendment found at the top using the open document icon (). ➤ Go to Step 4b 	<i>Note: The most recent version will also have a double asterisk beside it.</i> The Open Document Signature screen appears.

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4b	<p>From the Open Document Signature screen:</p> <ul style="list-style-type: none"> ➤ Enter <i>Signature PIN</i> ➤ Click Sign (to Review Documents) button 	<p>The Document Summary screen will appear.</p> <p><i>Note: To open a document in <u>View Only</u>, do not enter signature PIN and click the GET (Document as View) button.</i></p>
5	<p>The document may be reviewed from the Document Summary screen by clicking on a section heading or by the options listed in the <i>Document Toolbar</i> on the left.</p>	<p><i>Note: To back out of an adjustment without taking action (i.e. making changes or applying a signature stamp) you <u>MUST</u> click the Undo (Adjustment) button. Simply closing the document will still create the adjustment status even if no action was taken.</i></p>
6	<p>Once the document is ready to be stamped with a status, do the following:</p> <ul style="list-style-type: none"> ➤ To stamp it from the Document Summary screen follow step 6a ➤ To stamp it from the Document Status screen follow step 6b 	

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6a	<p>From the Document Summary screen:</p> <ul style="list-style-type: none"> ➤ Make sure the status to apply says REVIEWED or APPROVED, depending on your role. ➤ Type in your Signature PIN ➤ Enter Remarks (if any) ➤ Check the checkbox (if no adjustments have been made to the document – see notes) ➤ Click on the Stamp and Route button 	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The Stamp and Route button is toward the bottom of the Document Status section.</i> ✓ <i>If you type your Signature PIN and press ENTER that will only save the adjustment not stamp the document.</i> ✓ <i>Not checking the checkbox will leave the adjusted status in the history of the document even though there wasn't an adjustment.</i> ✓ <i>Reviewers and 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 Reviewers/Approvers 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>
6b	<p>Click on the Document Status link from either the header section in the Document Summary or from the <i>Menu Toolbar</i></p>	<p>The Document Status screen will appear</p>

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6b1	From the Document Status screen: <ul style="list-style-type: none"> ➤ Make sure the status to apply says REVIEWED or APPROVED, depending on your role. ➤ Type in your Signature PIN ➤ Enter Remarks (if any) ➤ Check the checkbox (if no adjustments have been made to the document – see 6a note) ➤ Click the Stamp (<i>and Submit Document</i>) button 	
7	The Pre-Audit Results screen appears <ul style="list-style-type: none"> ➤ If the document status has PASS, click Continue (<i>Stamping the Document</i>) button ➤ If the document status has FAILED, click Cancel (<i>Pre-Audit Results</i>). Fix the error, re-stamp the document. 	A blank screen may appear while Travel Manager is sending information to the Core Financial System (CFS). Please DO NOT close the browser. Wait until the Home screen appears.
8a	Reviewers will see the email addresses of the next set of reviewer(s)/approver(s) on their Home screen.	
8b	Approvers will see the CBA Obligation and/or Purchase Order Number on their Home screen.	
9	When finished: <ul style="list-style-type: none"> ➤ Click Logout in the <i>Menu Toolbar</i>. 	