



**NOAA** NATIONAL OCEANIC AND  
ATMOSPHERIC ADMINISTRATION  
UNITED STATES DEPARTMENT OF COMMERCE

# Routing Administration in ITM 9.0

FY 2016 – November  
V 1.0

# Electronic Routing – Things to Remember



## Electronic routing should mimic hard copy routing unless:

- An employee is requested to travel for NOAA/BIS office other than their own or under different project codes
  - *Funding Office signs Hard Copy/Sends Email*
  - *Employee's Office signs electronically.*
    - » <http://www.corporateservices.noaa.gov/finance/travel.html>
    - » ITM 9.0 Frequently Asked Questions (FAQ) (April 2010)
      - Section III -- Question 21
- 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.*

# Role/Form



- **Routing Administrator**

- Access to Administration Module to create/maintain routing lists

**All users are required to complete ITM User Access Request Form for access to the system:**

- <http://www.corporateservices.noaa.gov/finance/forms.html>
- All NEW users need to read the NOAA Non-Disclosure Form

**Group & Routing Administrators roles must have FMC Travel Coordinator's signature on form**

- <http://www.corporateservices.noaa.gov/finance/docs/>

# URL & Passwords



## Web-based application

- <https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w>

## Single Login Screen

- One password to access all modules
- Self-Reset Password Capability
- Passwords will follow DOC, NOAA & FDCC IT security policies
  - Must be at least 12 characters
  - MUST contain at least 3 of the following:
    - One (1) upper case letter
    - One (1) lower case letter
    - One (1) numeric value
    - One (1) special character
      - » Limited to pound sign ( # ) or underscore ( \_ )
    - Six (6) characters must be unique
  - Must be changed every 60 days

## Electronic Signatures

- Signature PINS used to electronically stamp documents with statuses
  - Must be at least 8 characters
  - Must contain at least one number

# Post-As-Approved (PAA)



## Authorizations

- *Started November 16, 2009*
- *No Ink Signatures Required - Electronically Signed/Approved*
- <http://www.corporateservices.noaa.gov/finance/travel.html>
- *Dispatch #11 – Elimination of Ink Signatures on TDY Authorizations*

## Routing Enforcement

- *Started April 12, 2010*
- *Pre-Audits and Stamping Edits put in place*
- <http://www.corporateservices.noaa.gov/finance/travel.html>
  - *Dispatch #12 – Routing Reinforcement*

# Post As Approved (PAA) Cont'd



## Vouchers

- *Started October 24, 2011*
- *No Ink Signatures Required – Electronically Signed/Approved*
- *Copies no longer sent to Finance – kept at office location*
  - ***Exceptions:***
    - *TVs that hit Audit Criteria*
    - *Reclaim or Local Vouchers*
    - *Invitational Travelers*
    - *Some Bargaining Unit Employees*
  - *Signed TV Copy & receipt copies sent to Finance for Exceptions*
    - *Originals kept at office location*
- <http://www.corporateservices.noaa.gov/finance/travel.html>
  - *Dispatch #14 – Preparing for Post As Approved*

# Routing Administration



- Applied to ITM Organization Code
  - Two levels of hierarchy
    - (1) FFB Designator
      - Headquarters (H) or Western (W)
    - (2) CBS Organization 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
- Limited to your ITM Org Code
- Touch only your routing lists/travelers

# Routing Lists



- Designated to facilitate electronic review and approval of travel documents
- Routing Review/Approval Chain Setup dependent upon business and travel policies
- Each level of review/approval needs to contain primary and alternate person
  - *Alternate must have same rights/roles as primary person*
- 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 List Considerations



## Questions to Ask Yourself:

- 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?

# Steps for Creating a Routing List



- User Record & Electronic Signature Needed
- 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
- This step only needed if creating a new routing list

# Routing Lists Screen



## 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

Organization



**Search**

Routing List

### Copy Routing List

From Name

**Copy**

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



## ITM 9.0 Conditional Routing Template

- Based off NOAA Travel Regulations (NTR) 301-1.20 – 301-1.35(d)
  - 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/finance/travel.html>
- 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 Signature Parts



## 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 Signature Parts 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 Signature Parts Cont'd



## PROCESS NAME

- Represents the level of the official who has the authority by NTR 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 Signature Parts 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*

# Signature Details Screen



## 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) v		
Signature Name	Pauline K. Garcia	Signature	Role
Status	APPROVED v		
Process Name	DOC REDELEGATED v		
Level	6		

### Record Last Updated

User ID

Date

Time

# Signatures in Routing List Screen



## Signatures in Routing List IAOP



### Quick Tip

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

For this Page you can:

- Signature
- Travelers
- 

### 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	0000-85109	PROCESSED	5	Jessica Hammond		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
  - Please only select those travelers that belong to your office/list

# Add Travelers to Routing List Screen



## 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	
<input type="checkbox"/>	Garcia,Pauline. K	0006-00011	H-20-01	IAOPSUP
<input type="checkbox"/>	Spennelli,Anthony. L	0006-00012	H-20-01	
<input type="checkbox"/>	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



## 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.Award (C.Suite)



User Account requests, JAVA/JInitiator, etc.

FSD/CBS Web Site [http://www.corporateservices.noaa.gov/finance/FOFSD\\_Home.html](http://www.corporateservices.noaa.gov/finance/FOFSD_Home.html)

- Click on Help Desk link for additional info, phone numbers, etc.
- Email: [ClientServices@noaa.gov](mailto:ClientServices@noaa.gov)
- Phone #: 301-444-3400
  - *Option #2 - Travel*
- Fax/Server #: 301-444-3401





# Questions & Discussion