



NOAA CBS INTEGRATED TRAVEL MANAGER DISPATCH #13 Custom Reports Updated August 2011

The ITM Custom Reports allows users to query and/or maintain information such as:

- User and Traveler Profiles
- Routing Administrators assigned within a traveler's ITM Org. Code
- Group Administrators with access to a particular traveler
- Routing List Assignments
- Potential Routing List errors
- Reviewing/Approving Official membership within a Routing List and the travelers assigned to those Routing Lists
- Self Serve Password Reset Questions and Responses

To access the Custom Reports:

1. While logged in to the Document Preparation module, select Reports from the upper Menu Toolbar
2. Select Custom Reports from the left hand Reports Setup Toolbar.

A user's ITM Role assignment (access level) determines which reports are available to a user.

ITM Role	Access Level	Custom Reports
ITM User	1	<ul style="list-style-type: none"> • Who Am I? • User Configuration Report • Challenge Question Responses
ITM Group Administrator	1,3	<ul style="list-style-type: none"> • Who Am I? • User Configuration Report • Challenge Question Responses
ITM Reviewer	1,3	<ul style="list-style-type: none"> • Who Am I? • User Configuration Report • Challenge Question Responses

ITM Approving Official	1,2	<ul style="list-style-type: none"> • Who Am I? • User Configuration Report • Challenge Question Responses
ITM Routing Administrator	1,5	<ul style="list-style-type: none"> • Who Am I? • Routing List • Routing Membership • User Configuration Report • Challenge Question Responses
ITM Finance Office	1,3,4,5	<ul style="list-style-type: none"> • Who Am I? • User Configuration Report • Challenge Question Responses
NOAA Client Services	0,1,3,4,5,8	<ul style="list-style-type: none"> • Who Am I? • Routing List • Routing Membership • User Configuration Report • Challenge Question Responses

WHO AM I?

The Who Am I report allows users to view information related to their individual User access setup. This report can provide useful information when contacting the NOAA Client Services Help Desk with issues relating to ITM Access.

Report Execution Limitations: This report is based on the credentials of the individual logged into the system. As a result, data retrieval for this report can only be generated for the user who is logged in.

ITM Role	Description
User ID	Identifies the user's User Identification Number.
Vendor Number	Identifies the user's Core Financial System (CFS) Vendor Number.
Name	Identifies the user's name as it appears on the User record.

Group Access

Identifies the ITM security Group [group of travelers] assigned to a user with Group Access

NOTE: A value will only be displayed in this field if the user has an ITM Role assignment of Group Administrator, Reviewing/Approving Official, Finance Office, Client Services Help Desk, or ITM Systems Application Administrator.

ITM Role	Description
Group Org	Identifies the ITM Org. Code the user's Group Access is assigned to. <i>NOTE: A value will <u>only</u> be displayed in this field if the user has an ITM Role assignment of Group Administrator.</i>
Organization	Identifies the ITM Org. Code the user is assigned to.
Org. Access	Identifies the ITM Org. Code a user can access for maintenance and data retrieval (i.e. Traveler Information, Routing Lists, Reports, etc...)
Level	Identifies the user's ITM Role assignment. Users may have access to one or more roles depending on the business needs of their office.

Level	Role Description
1	ITM User
1,3	ITM Group Administrator
1,3	ITM Reviewer
1,2	ITM Approving Official
1,3,4,5	ITM Finance Office User
1,5	ITM Routing Administrator
0,1,3,4,5,8	NOAA Client Services Help Desk
0,1,2,3,4,5,6,7,8,9	ITM Application Administrator

USER CONFIGURATION REPORT

The User Configuration Report allows users to view information related to a specific individual's User/Traveler setup. This report provides information such as:

- Who can prepare, access or edit my documents

- Who can I prepare, access or edit documents on behalf of
- Who is responsible for Routing Maintenance within my ITM Org. Code
- What Routing List is assigned to a traveler's Traveler Profile record
- Who are the Reviewing/Approving Officials responsible for electronically stamping my travel documents
- What routing lists am I a member of as a Reviewing/Approving Official
- Which travelers will I receive documents for as a Reviewing/Approving Official

This report provides useful information when attempting to;

- Validate email settings for travelers, users and/or Reviewing/Approving Officials
- Identify administrative personnel (Group and Routing Administrators)
- Identify electronic routing officials

Report Execution Limitations: By default when users first enter the User Configuration Report, the VNum of the person executing the report is displayed in the VNum field. A user who only has the ITM User role will only be able to run the report against their own VNum. A user with Group access (i.e, Group Administrator, Reviewing/Approving Official, Finance Office and Client Services) will be able to generate this report for all travelers within their ITM security Group.

ROUTING LIST REPORT

The Routing List report is designed to aid Routing Administrators in determining whether or not routing lists are setup appropriately and/or assigned to all employees within their organization. This report provides information such as:

- Travelers assigned to a routing list
- Reviewing/Approving Officials setup within the routing list
- Routing list setup errors
- Who can modify/maintain the routing list
- Who last modified/maintained the routing list

After creating/editing a routing list, Routing Administrators are highly encouraged to generate this report. When reviewing the results, it is important to note this report is designed to only identify some of the more common errors made during

the setup of a standard approval routing chain. Any errors encountered on a routing list deviating from the standard setup, will need to be scrutinized to determine the validity of the error encountered.

Retaining either a hard or soft copy of this report can prove beneficial in the unfortunate event a routing list is accidentally modified or deleted.

The Routing List report should be generated on a frequent basis to ensure:

- Reviewing/Approving Officials within an approval routing chain are still valid, active employees
- Travelers assigned to a routing list are applicable
- Travelers are not actively assigned to a routing list prior to intentionally deleting the routing list from ITM

Report Execution Limitations: Routing Administrators are limited to only retrieving routing list data for routing lists contained within their ITM Org. Code.

Note: Routing Lists should not be assigned to Invitational travelers or employees operating under the "EXCEPTED" process.

Error Messages	Description
DELEGATION CONFIGURATION	Indicates an approval level for one or more of the delegations (DOC NONDELEGATED, DOC DELEGATED, DOC REDELEGATED) is missing from the routing list. <i>Note: This error <u>only</u> has a potential to surface if approvals are broken out by Delegations as opposed to using [blank].</i>
DOCUMENT TYPE	Indicates an APPROVED level has not been inserted for each document type (i.e., Authorization, Voucher, Reclaim, and Local Voucher). <i>Note: This error <u>only</u> has a potential to surface if approvals are broken out by Document Type as opposed to using ALL.</i>
NONSTANDARD PROCESS NAME	Indicates a Process Name other than REVIEWED, PROCESSED or APPROVED has been inserted into the routing list (i.e., DOC WHTI, DOC FOREIGN, etc...)
NTO FOREIGN	Indicates the Primary and/or Alternate official(s) within the NOAA Travel Office (NTO) have not been inserted into the routing list.

Error Messages	Description
NTO LEVEL CONFLICT	Indicates a non-NTO FOREIGN level (i.e. Blank, DOCDELEGATED, DOC DELEGATED, DOC REDELEGATED) has been inserted into the routing list at the same level as the NOAA Travel Office (NTO FOREIGN)
STAMPED AFTER APPROVED	Indicates a non-approval level (i.e., REVIEWED, PROCESSED) has been inserted into the routing list at a level after an approval level.

ROUTING MEMBERSHIP REPORT

The Routing Membership report is designed to aid Routing Administrators in determining the approval routing chain(s) of a specific Reviewing/Approving Official, and the travelers assigned to those routing lists. This report can be used to verify Reviewing/Approving Officials are inserted in the appropriate approval routing chains. It can also be used if a Reviewing/Approving Official wants to know what list(s) he/she is a member of or what travelers they are responsible for.

Report Execution Limitations: Currently there are no execution limitations when generating this report. The Routing Membership report will allow Routing Administrators to retrieve data across all ITM Org. Codes.

CHALLENGE QUESTION RESPONSES

The Challenge Question Responses report allows users the ability to update/maintain their Self Service Password Reset Challenge Questions and Responses.

Report Execution Limitations: This report is based on the credentials of the individual logged into the system. As a result, data retrieval for this report is only relevant for the user who is logged in.

Lessons Learned

- Custom Reports are available to assist users in resolving/identifying basic setup issues within Travel Manager
- Access to Custom Reports depends on a user's ITM Role assignment (i.e. ITM User, ITM Group Administrator, ITM Routing Administrator, etc...)
- Custom Reports should be utilized, when possible, prior to contacting the NOAA Client Services Help Desk for assistance
- The Routing List report only identifies "potential" errors. It is possible to receive "False" errors especially when deviating from the standard approval routing chain setup.

