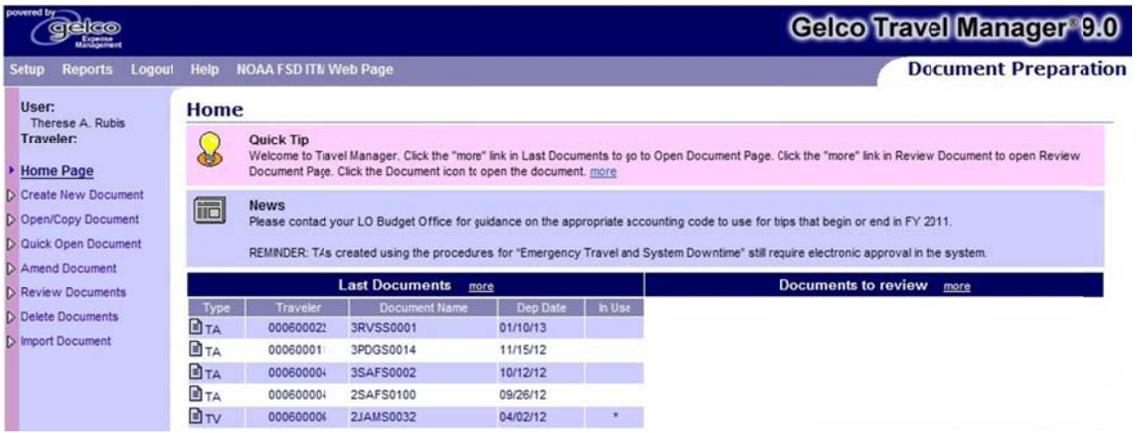


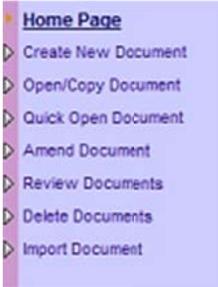
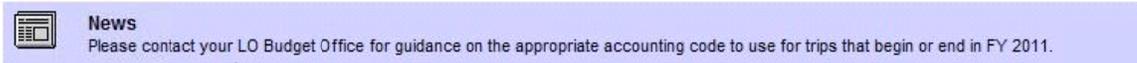
Exercise #1a: Navigation Basics

- Objectives:**
- Understand the terminology used in Travel Manager
 - Navigate in the system using the different menus

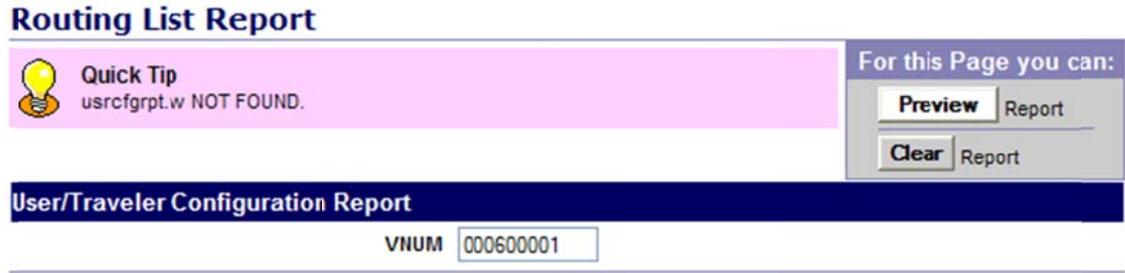
Instructions: Execute the following steps:

You have just logged into Travel Manager for the first time. Let’s go over some basics so you will be able to navigate the system.

Step	Action
1	<p>Upon first logging in you will come to the <i>Home</i> screen.</p> 
1a	<p>At the top of the <i>Home</i> screen are the Gelco Logos.</p> 
1b	<p>Underneath the logos on the right side is the “module” you are in, which happens to be Document Preparation.</p> 
1c	<p>On the same line as the module, but on the left is your Menu Toolbar. These options listed will change depending upon what screen you are on.</p> 

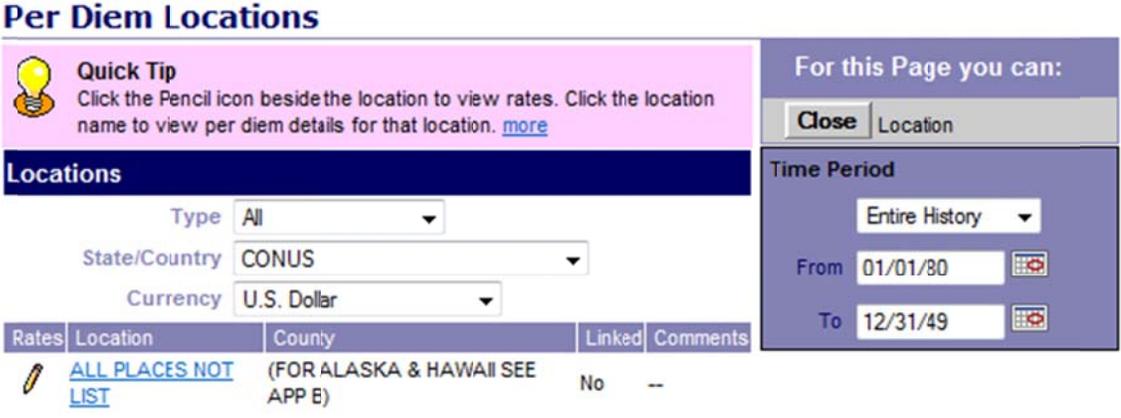
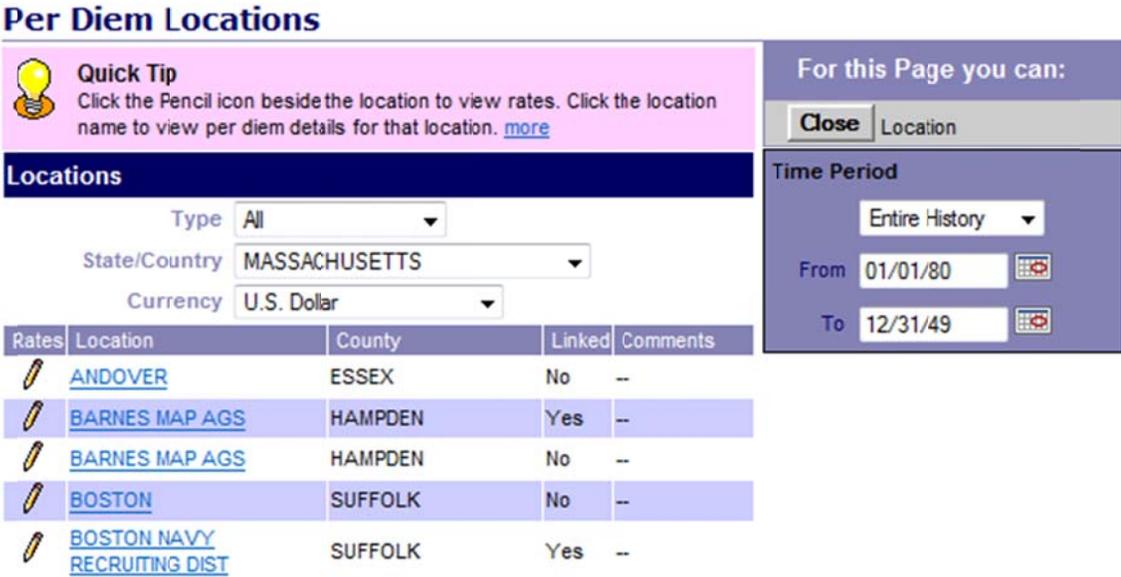
Step	Action																																																																						
1d	<p>Down the left side of the screen is the Document Toolbar. These options listed will change if you are in a document OR depending upon what screen you are on.</p> 																																																																						
1e	<p>In the upper left corner to the right of the Document Toolbar is the Screen name. In this case we are on the <i>Home</i> screen.</p> 																																																																						
1f	<p>Underneath the screen name are Quick Tips. Most of these are standard Travel Manager tips about the software; however, some of the tips are specific to NOAA.</p>  <p>Along with the Quick Tips is the News area. Things that are important for the user(s) to know will appear here.</p> 																																																																						
g	<p>Underneath the quick tips/news are two sections. The left column is the Last Documents. This area will display the last five documents that you modified. If a document has been DATALINKED in the system, it will no longer appear here. By clicking the More link, it will take you to the <i>Traveler Listing (Open/Copy Document)</i> screen. Allowing you to search by a traveler and document type.</p> <p>The right column is the Documents to Review. This area will display the five oldest documents in your review queue. By clicking the More link, it will take you to the <i>Review Document</i> screen, where it will list all documents awaiting review by you. It will also expand the information about the documents than what was shown on the <i>Home</i> screen.</p> <table border="1" data-bbox="284 1669 1421 1858"> <thead> <tr> <th colspan="5">Last Documents more</th> <th colspan="5">Documents to review more</th> </tr> <tr> <th>Type</th> <th>Traveler</th> <th>Document Name</th> <th>Dep Date</th> <th>In Use</th> <th>Type</th> <th>Traveler</th> <th>Document Name</th> <th>Dep Date</th> <th>In Use</th> </tr> </thead> <tbody> <tr> <td> TA</td> <td>000600022</td> <td>3RVSS0001</td> <td>01/10/13</td> <td></td> <td> TA</td> <td>000600007</td> <td>2SAFS0001</td> <td>09/24/12</td> <td></td> </tr> <tr> <td> TA</td> <td>000600011</td> <td>3PDGS0014</td> <td>11/15/12</td> <td></td> <td> TA</td> <td>000600006</td> <td>1JAMS1004</td> <td>06/13/11</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>3SAFS0002</td> <td>10/12/12</td> <td></td> <td> TA</td> <td>000600008</td> <td>1SHPS0001</td> <td>03/01/11</td> <td></td> </tr> <tr> <td> TA</td> <td>000600004</td> <td>2SAFS0100</td> <td>09/26/12</td> <td></td> <td> TA</td> <td>000600004</td> <td>3SAFS0002</td> <td>10/12/12</td> <td></td> </tr> <tr> <td> TV</td> <td>000600006</td> <td>2JAMS0032</td> <td>04/02/12</td> <td>*</td> <td> TA</td> <td>000600022</td> <td>3RVSS0001</td> <td>01/10/13</td> <td></td> </tr> </tbody> </table>	Last Documents more					Documents to review more					Type	Traveler	Document Name	Dep Date	In Use	Type	Traveler	Document Name	Dep Date	In Use	TA	000600022	3RVSS0001	01/10/13		TA	000600007	2SAFS0001	09/24/12		TA	000600011	3PDGS0014	11/15/12		TA	000600006	1JAMS1004	06/13/11		TA	000600004	3SAFS0002	10/12/12		TA	000600008	1SHPS0001	03/01/11		TA	000600004	2SAFS0100	09/26/12		TA	000600004	3SAFS0002	10/12/12		TV	000600006	2JAMS0032	04/02/12	*	TA	000600022	3RVSS0001	01/10/13	
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Step	Action	
2	<p>From the Menu Toolbar click on Setup. A new window will open up for the module Administrative Setup.</p> 	
3	<p>Click on Reports in the Menu Toolbar, the document toolbar options change.</p>	

Step	Action
3a	<p>Click on Custom Reports will bring up a screen listing a few different reports. The reports listed will depend on your role within the system. Below is a screenshot of a Group/Routing Administrator’s options.</p>  <p>NOAA MENU</p> <p> Quick Tip Add quicktip</p> <p>Custom Report</p> <ul style="list-style-type: none"> Who Am I? Routing List Routing Membership <p>Administrative Utilities</p> <ul style="list-style-type: none"> User Configuration Report SAF Outliers Report Challenge Question Responses <p>The report which will help users is the <i>User Configuration Report</i>. Clicking on that report link will bring up the following screen:</p>  <p>Routing List Report</p> <p> Quick Tip usrctgrpt.w NOT FOUND.</p> <p>For this Page you can:</p> <p><input type="button" value="Preview"/> Report</p> <p><input type="button" value="Clear"/> Report</p> <p>User/Traveler Configuration Report</p> <p>VNUM <input type="text" value="000600001"/></p> <p>For any user, the VNUM field will populate with their vendor number. Only Routing Administrators have the capability to look up any users within their ITM organization.</p>

Step	Action
3b	<p>Clicking on the Preview Report button, will bring up a new window.</p> <div data-bbox="284 352 1421 1276" style="border: 1px solid black; padding: 10px;"> <pre> Date: 09/11/12 09:50 Page: 1 User/Traveler Configuration for VNUM: 000600001 - Rubis, Therese A My User Record Information: (A User record is used to perform a function within the system, such as prepare a document for a traveler or to sign, review, or approve a document in the system, as well as to perform maintenance functions in the system. A User may or may not also be a traveler). Email Address: therese.rubis@test.noaa.gov User-ID: Rub0001 Organization Membership: H-20-01 Organization Access: H-20-01 Group Access: H-20-01-IAOP My Traveler Record Information: (A Traveler record is used when authorizing or making claims for travel. In most cases a traveler is also a user, but this may not always be true, such as in the case of INVITATIONAL travel.) Email Address: therese.rubis@test.noaa.gov Organization Membership: H-20-01 Associated Routing List: IAOP Cardholder Code (Invitational Indicator): CARD HOLDER My Routing List Administrator(s) is: 000600001 Therese A. Rubis 000600002 Karen B. Davis I can prepare, access or edit documents for these travelers: 000600001 Rubis, Therese A 000600002 Davis, Karen B 000600003 Wenthel, Scott C 000600004 Doran, Chris D I am a member of these Groups: H-06-01-Training1 These users can access my documents via this group (even documents that are not currently routing): 000100001 Erin R. Gaithersburg 000100002 Jackie A. Gaithersburg Generated by: 000600001 - Therese A. Rubis </pre> </div> <p>This report lists the basic information about the user. It includes:</p> <ul style="list-style-type: none"> • User Record Information • Travel Record Information • Routing List Administrator(s) • If a Group Administrator the individuals you can prepare documents for • The other people that can access documents within the group • Routing List information • If Review/Approver, which routing lists you are listed on

Step	Action	
4	<p>Click on Admin in the Menu Toolbar, the document toolbar options change. These options allow a user to change their password, reset their signature and remove edit locks.</p> <p>It will also allow an approving official to delegate their approving authority, should they be out of the office and no backups have been designated in the routing list.</p>	
4a	<p>When clicking on Remove Edit Locks, the following screen will appear:</p>  <p>If you inadvertently closed out the document incorrectly or “edit locked” the document so no one else can edit it, the document will appear here. The only thing that needs to be done at that point is to click the Document Name to remove the edit lock. You can not remove an edit lock on a document that another user did. You would have to contact NOAA Client Services Help Desk to have them remove the edit lock.</p>	
5	<p>Click on Rates in the Menu Toolbar, the document toolbar options change. These options allow a user to lookup per diem location rates without having to create a new document.</p>	

Step	Action																														
5a	<p>Clicking on Per Diem Locations brings up the following screen:</p>  <p>Per Diem Locations</p> <p>Quick Tip Click the Pencil icon beside the location to view rates. Click the location name to view per diem details for that location. more</p> <p>For this Page you can: Close Location</p> <p>Locations</p> <p>Type: All State/Country: CONUS Currency: U.S. Dollar</p> <p>Time Period Entire History From: 01/01/80 To: 12/31/49</p> <table border="1"> <thead> <tr> <th>Rates</th> <th>Location</th> <th>County</th> <th>Linked</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td>ALL PLACES NOT LIST</td> <td>(FOR ALASKA & HAWAII SEE APP E)</td> <td>No</td> <td>--</td> </tr> </tbody> </table> <p>Users have the ability by using the drop-down listings to select the state/country in order to find the rates for the specific location. They also have the ability to the right to specify a specific time period. If nothing is put in the Time Period, the system will bring back all rates for that location, including those locations that may no longer be active.</p>	Rates	Location	County	Linked	Comments		ALL PLACES NOT LIST	(FOR ALASKA & HAWAII SEE APP E)	No	--																				
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5b	<p>Once a State/Country has been selected, a user will need to click or tab outside of that drop-down listing in order for the screen to refresh with all of the locations listed in the per diem tables.</p>  <p>Per Diem Locations</p> <p>Quick Tip Click the Pencil icon beside the location to view rates. Click the location name to view per diem details for that location. more</p> <p>For this Page you can: Close Location</p> <p>Locations</p> <p>Type: All State/Country: MASSACHUSETTS Currency: U.S. Dollar</p> <p>Time Period Entire History From: 01/01/80 To: 12/31/49</p> <table border="1"> <thead> <tr> <th>Rates</th> <th>Location</th> <th>County</th> <th>Linked</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td></td> <td>ANDOVER</td> <td>ESSEX</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BARNES MAP AGS</td> <td>HAMPDEN</td> <td>Yes</td> <td>--</td> </tr> <tr> <td></td> <td>BARNES MAP AGS</td> <td>HAMPDEN</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BOSTON</td> <td>SUFFOLK</td> <td>No</td> <td>--</td> </tr> <tr> <td></td> <td>BOSTON NAVY RECRUITING DIST</td> <td>SUFFOLK</td> <td>Yes</td> <td>--</td> </tr> </tbody> </table> <p>This screen is a split screen, so the scrollbar will need to be utilized to scroll through the locations. The top part not only shows the location, but the county the location is in.</p>	Rates	Location	County	Linked	Comments		ANDOVER	ESSEX	No	--		BARNES MAP AGS	HAMPDEN	Yes	--		BARNES MAP AGS	HAMPDEN	No	--		BOSTON	SUFFOLK	No	--		BOSTON NAVY RECRUITING DIST	SUFFOLK	Yes	--
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5c	<p>Click the <i>View Rates</i>  icon in order to populate in the lower half of the screen the rates for that location.</p> <table border="1" data-bbox="289 396 1411 680"> <thead> <tr> <th colspan="8">Rates for ANDOVER, MASSACHUSETTS</th> </tr> <tr> <th>Lodging</th> <th>M & IE</th> <th>Eff Date</th> <th>Expdate</th> <th>Snl St</th> <th>Snl End</th> <th>Currency</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td> 87.00</td> <td>56.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 83.00</td> <td>56.00</td> <td>10/01/10</td> <td>09/30/11</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 88.00</td> <td>56.00</td> <td>10/01/09</td> <td>09/30/10</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 90.00</td> <td>59.00</td> <td>10/01/08</td> <td>09/30/09</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 87.00</td> <td>59.00</td> <td>10/01/07</td> <td>09/30/08</td> <td>01/01</td> <td>12/31</td> <td>USD</td> <td>--</td> </tr> </tbody> </table> <p>If no dates were put in the Time Period section on the top part of the screen all rates starting with the most current will be listed. Users need to be aware of the Effective and Expiration Date fields. If there are multiple effective and expiration dates with the same information populated, it is a good indication that this means this location has seasonal rates:</p> <table border="1" data-bbox="289 947 1411 1360"> <thead> <tr> <th colspan="8">Rates for BOSTON, MASSACHUSETTS</th> </tr> <tr> <th>Lodging</th> <th>M & IE</th> <th>Eff Date</th> <th>Expdate</th> <th>Snl St</th> <th>Snl End</th> <th>Currency</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td> 158.00</td> <td>71.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>11/01</td> <td>03/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 221.00</td> <td>71.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>10/01</td> <td>10/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 221.00</td> <td>71.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>09/01</td> <td>09/30</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 183.00</td> <td>71.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>07/01</td> <td>08/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 201.00</td> <td>71.00</td> <td>10/01/11</td> <td>12/31/49</td> <td>04/01</td> <td>06/30</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 154.00</td> <td>71.00</td> <td>10/01/10</td> <td>09/30/11</td> <td>11/01</td> <td>03/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 206.00</td> <td>71.00</td> <td>10/01/10</td> <td>09/30/11</td> <td>10/01</td> <td>10/31</td> <td>USD</td> <td>--</td> </tr> <tr> <td> 206.00</td> <td>71.00</td> <td>10/01/10</td> <td>09/30/11</td> <td>09/01</td> <td>09/30</td> <td>USD</td> <td>--</td> </tr> </tbody> </table>	Rates for ANDOVER, MASSACHUSETTS								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment	 87.00	56.00	10/01/11	12/31/49	01/01	12/31	USD	--	 83.00	56.00	10/01/10	09/30/11	01/01	12/31	USD	--	 88.00	56.00	10/01/09	09/30/10	01/01	12/31	USD	--	 90.00	59.00	10/01/08	09/30/09	01/01	12/31	USD	--	 87.00	59.00	10/01/07	09/30/08	01/01	12/31	USD	--	Rates for BOSTON, MASSACHUSETTS								Lodging	M & IE	Eff Date	Expdate	Snl St	Snl End	Currency	Comment	 158.00	71.00	10/01/11	12/31/49	11/01	03/31	USD	--	 221.00	71.00	10/01/11	12/31/49	10/01	10/31	USD	--	 221.00	71.00	10/01/11	12/31/49	09/01	09/30	USD	--	 183.00	71.00	10/01/11	12/31/49	07/01	08/31	USD	--	 201.00	71.00	10/01/11	12/31/49	04/01	06/30	USD	--	 154.00	71.00	10/01/10	09/30/11	11/01	03/31	USD	--	 206.00	71.00	10/01/10	09/30/11	10/01	10/31	USD	--	 206.00	71.00	10/01/10	09/30/11	09/01	09/30	USD	--
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6	<p>To close out the setup, click the red “X” in the upper right hand corner or click Close on the Menu Toolbar. If clicking on the red “X”, please only click once. If the screen was maximized and you double-clicked, you would close out Travel Manager.</p>																																																																																																																																								