

## Abbreviated Instructions for Creating Routing in TM 9.0

Step	Action	Results
1a	<ul style="list-style-type: none"> <li>➤ Open Internet Explorer</li> <li>➤ Go to the following URL: <a href="https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w">https://itm-prod.rdc.noaa.gov/cgi-bin/90ipi/docprep/login.w</a></li> </ul>	Brings up the ITM 9.0 Production Login Page
1b	From the <b>Travel Manager 9.0 Login</b> page <ul style="list-style-type: none"> <li>➤ Enter <b>Username</b></li> <li>➤ Enter <b>Password</b></li> </ul>	<i>Note: If you press ENTER the system will automatically take you to the Document Preparation module.</i>
2	Click on <b>Administration</b>	The system will take you to the <b>Administrative Setup</b> page
3	From the <b>Menu Toolbar</b> : <ul style="list-style-type: none"> <li>➤ Click on <b>EPA</b></li> </ul>	This will change the left menu options found on the <b>Navigation Tree</b>
4	From the <b>Navigation Tree</b> : <ul style="list-style-type: none"> <li>➤ Click on <b>Routing</b></li> <li>➤ Click on <b>Routing List</b></li> </ul>	This will expand the options found under Routing on the <b>Navigation Tree</b> and after selecting routing list will open up the <b>Routing Lists</b> page which is broken into two sections.
5	Click on the <b>Add (Routing List)</b> button found in the upper right corner to create a new routing list	The <b>Routing Details</b> area appears with blank fields.
6	In the <b>Routing Details</b> area: <ul style="list-style-type: none"> <li>➤ Enter <b>Routing List Name</b></li> <li>➤ Enter <b>Organization</b></li> <li>➤ Click <b>Save</b></li> </ul>	<i>Note: The routing list name can only be 8 characters long.</i>  The screen will refresh and list the newly added routing list.
7	From the <b>Navigation Tree</b> : <ul style="list-style-type: none"> <li>➤ Click on <b>Signatures in Routing List</b></li> </ul> From the <b>Routing List Search Results</b> listing: <ul style="list-style-type: none"> <li>➤ Click on the <b>Routing List</b> (name)</li> </ul>	The <b>Signatures in Routing</b> page appears.  <i>Note: A search may have to be completed to find the Routing List name.</i>  The <b>Signatures in Routing List (xyz)</b> page appears.
8	Click the <b>Add (Signature)</b> button in the upper right corner to add your reviewer(s)/approver(s) to the routing list	The <b>Signature Details</b> page appears.

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9	<p>Fill out following fields:</p> <ul style="list-style-type: none"> <li>➤ Document Type</li> <li>➤ Signature Name</li> <li>➤ Status</li> <li>➤ Level</li> </ul> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li>✓ You may search for anyone in the ITM database for a signature</li> <li>✓ The initial listing that will show will be for your ITM Organization</li> <li>✓ Searches can be done by Organization or First Name</li> <li>✓ Status of PROCESS should only be used with the NOAA Travel Office (NTO)</li> </ul>	<p>VALUES:</p> <p><u>Document Type</u> All = All Types</p> <p><u>Status</u> REVIEWED PROCESSED APPROVED</p> <p><u>Process Name</u> DOC NONDELEGATED DOC DELEGATED DOC REDELEGATED NTO FOREIGN</p> <p><u>Level</u> 1-5</p>
10	Click the <b>Save</b> ( <i>Signature Updates</i> ) button in the upper right corner to save your new reviewer/approver.	The <b>Signatures in Routing List</b> (xyz) page appears listing the signature just added.
11	Repeat steps 8-10 as necessary to add all routing reviewer/approvers for your routing list.	
12	To add your travelers to the routing list, click on the <b>Maintain</b> ( <i>Travelers</i> ) button in the upper right corner	This will change the screen to <b>Add Travelers to Routing List</b> (xyz)
13	<p>Search or find the names of the travelers you wish to add to the routing list</p> <ul style="list-style-type: none"> <li>➤ Click the checkbox to the left of their name</li> <li>➤ Click the <b>Add</b> (<i>Travelers</i>) button</li> </ul>	<p>The screen will refresh showing the specific routing list assignment for those selected travelers.</p> <p><i>Notes:</i></p> <ul style="list-style-type: none"> <li>✓ Only those travelers who have the same ITM Organization Access will show</li> <li>✓ The reviewer/approver(s) assigned to the list will not have a checkbox next to their name</li> <li>✓ Invitational Travelers should not be selected to be part of the routing list</li> <li>✓ After clicking on the checkboxes, make sure to click the Add (<i>Travelers</i>) button prior to searching for additional travelers or moving from the existing page</li> <li>✓ You can add or switch users to routing lists, but you must contact the CBS Help Desk to have them removed</li> </ul>
14	<p>When finished with your routing lists:</p> <ul style="list-style-type: none"> <li>➤ Click <b>Logout</b></li> </ul>	This will log you out of TM 9.0