
TRAVEL MANAGER PREPARER'S GUIDE

WEB WINDOW OVERVIEW

This section introduces the user to Travel Manager on the Web. Menu locations, link identification and common buttons are addressed.

WEB WINDOW OVERVIEW

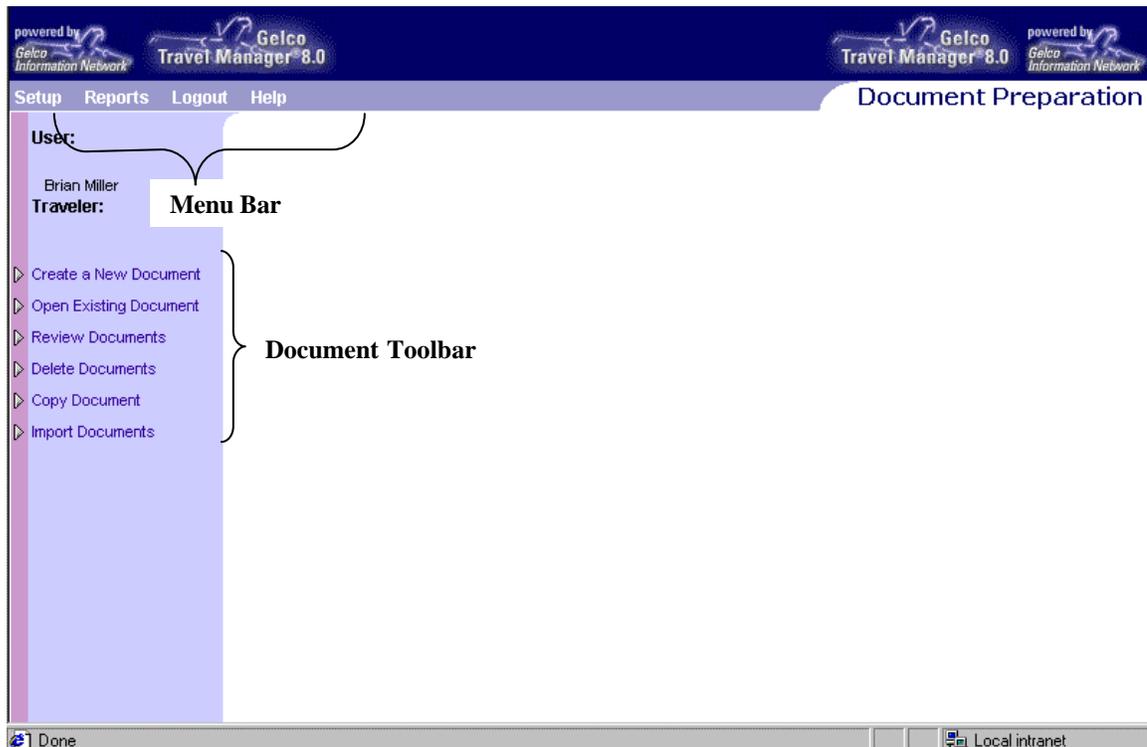
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WEB WINDOW OVERVIEW

A. DOCUMENT TOOLBAR

The Document Toolbar contains links that perform specific Travel Manager actions.



NOTE

*Do not use Netscape or the Internet Explorer browser navigation buttons. Use the TM software navigation buttons located in the **For This Document You Can:** box located on the upper right side of the screen page.*

Several screens in Travel Manager require that you click outside the field to refresh the screen and add the data to a field.

Create A New Document – Used for creating new documents such as Authorizations, Vouchers from Authorizations, Amendments, and Local Vouchers. Note: the voucher selection is not used at NASA.

Open Existing Document – This function is used to check the status of an existing Travel Authorization or Voucher and/or review previously created documents.

Review Documents – This function is used as a “queue” for Reviewer/Approvers who have documents routed to them, and for Preparers who create documents but do not wish to sign and route them until closer to travel dates.

Delete Documents – This function is used to delete travel documents due to error or cancellation of a trip and the authorization or voucher has not been signed and routed. Contact the Help Desk to delete a document once it has been signed and routed.

Copy Document – This function is used to copy a document already created by a user or another Preparer. The feature is most commonly used for multiple travelers going to the same location for the same purpose.

Import Documents – This link is not functional for Preparers.

B. MENU TOOLBAR

The Menu Toolbar contains links that perform specific Travel Manager actions.

Setup- This function allows a user to review some of the administration tables and functions that can be executed on the web. The most commonly used feature is found under the Admin Tab where a user can Remove Edit Locks from documents change a user’s password or signature PIN. Another tool found under this tab can be found by accessing the Rates button. Here, a user can research per diem rates for foreign and domestic travel.

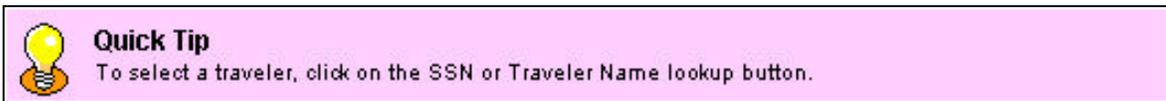
Reports- This function allows a user to access several types of reports, each with its own selection criteria. The reports are designed to provide travel activity information for a traveler or a group of travelers. They also can aid managers in monitoring and controlling travel within an organization.

Logout- This function is used to properly exit the Travel Manager system. When a user is finished using the software, the logout button will exit the user to the main login page.

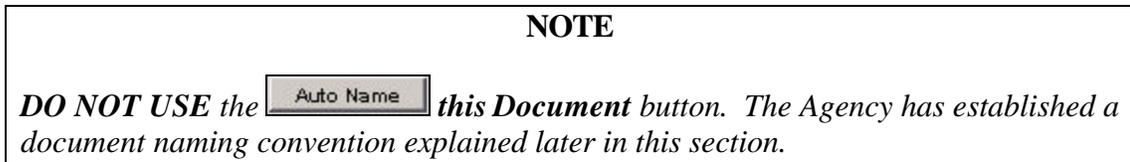
Help- The Help section describes document creation and defines the system icons used in the application.

C. PAGE ELEMENTS

1. The **User:** name is displayed in the top left corner of the page. The name is either the traveler, if the traveler prepares his/her own travel document or the Preparer's name.
2. A Quick Tip area displays information to help the user select or enter the appropriate data on the page. This area is located at the top middle of the page.



3. A For this Document you can: area is included on all pages, located in the top right corner. It contains buttons that are appropriate to the processing on the page.



4. A new document may be created by using the  **this Document** button.



5. For pages where a specific document is being processed, the Traveler's name and document name are also displayed in the top left corner below the **User:** name.



6. Some of the commonly used icons for editing a document are the Update icon , which is used to edit a record, and the Delete icon , which is used to delete a record.