Agenda

• People
  – Profiles
  – Permission Levels
  – Access
  – User Roles

• Routing Lists
  – Manual Stamps
  – System Generated Stamps
  – Conditional Routing

• Groups
  – Group Access
  – Group Membership
  – Individual Group Membership
  – Global Group Membership
People
People - Profiles

• Two ways a profile can be created in DTS:
  – DTA adds individual through DTA Maintenance Tool
  – Traveler submits profile through self registration

• Two types of profiles
  – User: Cannot travel
  – User/traveler*: Requires more information

*User/traveler profile recommended unless user plans on never traveling or is not authorized to travel in DTS
Permission Levels

0-9

Access

Organization

Group

Read-Only
Permission Levels

• Defines who can perform specific tasks within DTS
• Controls accessibility of DTS modules and functions
• DTA assigns to each user in order to access DTS
• Range from 0 to 9
• Must have permission level to grant to another person
  – Permission Levels are exclusive
## Functions and Permission Levels

<table>
<thead>
<tr>
<th>Functions</th>
<th>Permission Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create/Sign Documents</td>
<td>0</td>
</tr>
<tr>
<td>Access DTA Maintenance Tool/View Budget</td>
<td>1</td>
</tr>
<tr>
<td>Access Route &amp; Review</td>
<td>2</td>
</tr>
<tr>
<td>Delegate Authority</td>
<td>2</td>
</tr>
<tr>
<td>Edit Budget and Traveler’s EFT data</td>
<td>3</td>
</tr>
<tr>
<td>Enter Manual Transactions in Budget</td>
<td>3</td>
</tr>
<tr>
<td>Reconcile Centrally Billed Account(s)*</td>
<td>4</td>
</tr>
</tbody>
</table>

*account activation required by CBA DTA*
### Functions & Permission Levels (continued)

<table>
<thead>
<tr>
<th>Functions</th>
<th>Permission Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Organizations &amp; Routing Lists</td>
<td>5</td>
</tr>
<tr>
<td>Edit Groups &amp; People</td>
<td>5</td>
</tr>
<tr>
<td>Edit Lines of Accounting</td>
<td>6</td>
</tr>
<tr>
<td>Track Due US Vouchers</td>
<td>6</td>
</tr>
<tr>
<td>Reserved for PMO, DTMO, TAC and Service/Agency DTAs</td>
<td>7, 8, 9</td>
</tr>
</tbody>
</table>
Types of Access

• **Organization Access**
  – Maintain resources for organizations
  – Run Reports

• **Group Access**
  – View, create, and edit travel documents for others

• **Read-Only Access**
  – View but not edit documents
  – Used by auditors and Transportation Officers
## Organization Access vs. Group Access

<table>
<thead>
<tr>
<th><strong>Organization Access</strong></th>
<th><strong>Group Access</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who:</strong> DTAs</td>
<td><strong>Who:</strong> travel preparers/clerks, help desk personnel, NDEAs, DTAs</td>
</tr>
<tr>
<td><strong>What:</strong> resources for Orgs and Sub-Orgs</td>
<td><strong>What:</strong> documents (authorizations, vouchers, local vouchers)</td>
</tr>
<tr>
<td><strong>Where:</strong> DTA Maintenance Tool/Budget Module</td>
<td><strong>Where:</strong> travel module, official travel-others</td>
</tr>
<tr>
<td><strong>Why:</strong> specifies which people, organizations, routing lists, budgets, LOAs, and groups can be viewed, created and updated</td>
<td><strong>Why:</strong> to view, edit and create documents on behalf of someone else</td>
</tr>
</tbody>
</table>

*Read-Only Access*: Used by Auditors and TO’s to view but not edit documents
USER ROLES
Suggested User Roles

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission Level</th>
<th>Access</th>
<th>Group</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler</td>
<td>0</td>
<td>no organization access</td>
<td>no group access</td>
<td></td>
</tr>
<tr>
<td>Travel Preparer/Clerk</td>
<td>0</td>
<td>no organization access</td>
<td>group access</td>
<td></td>
</tr>
<tr>
<td>NDEA</td>
<td>0</td>
<td>no organization access</td>
<td>group access</td>
<td>T-ENTERED stamp (submit voucher for traveler)</td>
</tr>
<tr>
<td>Routing Officials</td>
<td>0, 2</td>
<td>organization access (optional)</td>
<td>group access (optional)</td>
<td></td>
</tr>
</tbody>
</table>

Office of the Under Secretary of Defense (Personnel and Readiness)
### User Roles (continued)

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission Level</th>
<th>Access</th>
<th>Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead DTA</td>
<td>0-6</td>
<td>organization</td>
<td>group</td>
</tr>
<tr>
<td></td>
<td></td>
<td>access</td>
<td></td>
</tr>
<tr>
<td>Organizational</td>
<td>0,1,2,5</td>
<td>organization</td>
<td>group</td>
</tr>
<tr>
<td>DTA</td>
<td></td>
<td>access</td>
<td></td>
</tr>
<tr>
<td>Budget DTA</td>
<td>0,1,3</td>
<td>organization</td>
<td>group</td>
</tr>
<tr>
<td></td>
<td></td>
<td>access</td>
<td></td>
</tr>
<tr>
<td>Finance DTA</td>
<td>0,1,6</td>
<td>organization</td>
<td>no group</td>
</tr>
<tr>
<td></td>
<td></td>
<td>access</td>
<td></td>
</tr>
</tbody>
</table>

**Connect 2011**

**Office of the Under Secretary of Defense (Personnel and Readiness)**
People – Reassign, Detach, Receive, Delete

*Can only be done by DTA from Main Organization

**Profiles with created documents will remain in None Org for 15 months; all others permanently deleted
ROUTING LISTS
Routing Lists Overview

• Specifies order for electronic processing of documents
• Each organization must have at least one routing list
  – Can have multiple routing lists
• Empty when created
• Labels cannot include ampersands “&” or commas “,”
Minimum Routing List Requirements

• All *authorizations* must include the minimum stamps:
  – *CTO SUBMIT (Level 2)*- Routes document to Commercial Travel Office (CTO) when traveler has used Reservation Module
  – *CTO BOOKED (Level 3)*- CTO has performed quality checks
  – *APPROVED (Level 25)*- Final stamp which indicates obligation has been initiated and traveler is approved to travel

• All *vouchers* and *local vouchers* must include:
  – *APPROVED (Level 25)*- AO has accepted claim for reimbursement
Stamps to Initiate Routing

• SIGNED
  – Used by traveler or Travel Clerk
  – Document stays in DTS Database for 15 months
  – Initiates electronic routing of document

• T-ENTERED
  – Used by NDEA to submit voucher on behalf of traveler
  – Only used for Vouchers and Local Vouchers
Manual Routing Stamps

• REVIEWED/AUTHORIZED
  – Document has been examined for accuracy
  – Causes no action except for continued electronic routing

• CERTIFIED
  – Indicates availability of funds has been verified

• APPROVED
  – Used by AO
  – Required on all routing lists for all document types
  – Indicates document has been approved for final processing
  – TA Number assigned
  – Funds allocated in DTS Budget
  – Financial transactions sent
  – Approval sent to ticketing queue of CTO
Manual Stamps Not Included in Routing List

- **RETURNED***
  - Used by various ROs
  - Returns document to traveler
  - Used when document needs traveler’s attention
  - Traveler must re-sign document to reinitiate routing process

- **CANCELLED***
  - Used by various ROs
  - Terminates routing of document
  - De-obligates funds
  - Cancels reservations
  - Cancelled documents can only be viewed
  - Vouchers and local vouchers can not be cancelled

*Stamps should not be included in the routing list*
System-Generated Routing Stamps

• CTO SUBMIT/CTO BOOKED
  – Required for all authorizations with reservations
  – Mandatory for authorizations utilizing reservation module
  – Routing list levels must be consecutive (2 and 3)
  – Confirms held reservations
  – Quality check
System-Generated Stamps Not in Routing List

• CREATED*
  – Generated when document is first created
  – Indicates document has not yet been stamped SIGNED
  – Causes no action within DTS
  – Does not involve any processing of document

• POS ACK RECEIVED*
  – Acknowledgement of fund obligation from DADS

*Stamps should not be included in the routing list
System-Generated Stamps Not in Routing List

• **AUDIT PASS/AUDIT FAIL***
  – Document passed or failed Payment Module audit
  – If document fails audit, email sent to traveler

• **PAY LINK***
  – Document copied from DTS to Payment Module database

• **VOUCHER SUBMITTED***
  – Awaiting PAID stamp applied upon payment of voucher

*Stamps should not be included in the routing list*
System-Generated Status Codes (continued)

• PAID*
  – Generates when payment remittance generated
  – Email sent to traveler

• REJECT*
  – Indicates obligation or payment has not been made
  – Sends reject email to the DTA ID and traveler

*Stamps should not be included in the routing list
## Sample Routing List

<table>
<thead>
<tr>
<th>Doc Type</th>
<th>Doc Status</th>
<th>Signature Name</th>
<th>Level</th>
<th>Process Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTH</td>
<td>CTO SUBMIT</td>
<td>CTO SUBMIT</td>
<td>2</td>
<td>BYPASS PNR</td>
</tr>
<tr>
<td>AUTH</td>
<td>CTO BOOKED</td>
<td>CTO BOOKED</td>
<td>3</td>
<td>BYPASS PNR</td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>LEAH SMITH</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>BILL TREMPER</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>ED CULLEN</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>JANET JOSEPH</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
<td>REVIEWED</td>
<td>LEAH SMITH</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
<td>REVIEWED</td>
<td>BILL TREMPER</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
<td>APPROVED</td>
<td>ED CULLEN</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
<td>APPROVED</td>
<td>JANET JOSEPH</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>REVIEWED</td>
<td>LEAH SMITH</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>REVIEWED</td>
<td>BILL TREMPER</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>APPROVED</td>
<td>JANET JOSEPH</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>APPROVED</td>
<td>ED CULLEN</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
Conditional Routing

• Optional feature allowing Routing element to be skipped if condition does not exist

• Condition is defined using a “PROCESS NAME”

• Examples
  – FOREIGN TRAVEL
  – TRAVEL MODE ROUTE
  – TRAVELER NUMBER
  – BYPASS PNR
Conditional Routing — Foreign Travel

- Routes document to designated individual based on TDY location (OCONUS only)

**Foreign Travel Example**

- Katherine Young (RO)
- Crystal Burnley (AO)

**Traveler**

IF FOREIGN TRAVEL OCCURS

YES

NO
# Sample Routing List

<table>
<thead>
<tr>
<th>Doc Type</th>
<th>Doc Status</th>
<th>Signature Name</th>
<th>Level</th>
<th>Process Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTH</td>
<td>CTO SUBMIT</td>
<td>CTO SUBMIT</td>
<td>2</td>
<td>BYPASS PNR</td>
</tr>
<tr>
<td>AUTH</td>
<td>CTO BOOKED</td>
<td>CTO BOOKED</td>
<td>3</td>
<td>BYPASS PNR</td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>KATHERINE YOUNG</td>
<td>10</td>
<td>FOREIGN TRAVEL</td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>CHRIS SAMPSON</td>
<td>10</td>
<td>FOREIGN TRAVEL</td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>CRYSTAL BURNLEY</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>MICHAEL HALL</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
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<td>MARTHA CLIFT</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LVCH</td>
<td>REVIEWED</td>
<td>JOANNA ALLEN</td>
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<td></td>
</tr>
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<td>MICHAEL HALL</td>
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</tr>
<tr>
<td>VCH</td>
<td>REVIEWED</td>
<td>KATHERINE YOUNG</td>
<td>10</td>
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<td>VCH</td>
<td>REVIEWED</td>
<td>CHRIS SAMPSON</td>
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<tr>
<td>VCH</td>
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<td>CRYSTAL BURNLEY</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>APPROVED</td>
<td>MICHAEL HALL</td>
<td>25</td>
<td></td>
</tr>
</tbody>
</table>
Purpose of Groups

• Provides access to travelers documents
  – View, create, edit documents

• Access granted to:
  – Travel preparers/clerks
  – NDEAs
  – DTAs
  – Help desk personnel
Characteristics of a Group

- List of travelers’ names
- No members when first created
- *NOT* hierarchical
- Owned by an organization
- Two ways to add members
  - Automatically via Global Group Membership Rules
  - Individually via Individual Group Membership
Group Access

• Allowed access to only one group

• Not needed for travelers to access own documents or for ROs to access documents via Route and Review
Group Membership

• Allows travelers’ **documents to be seen** and managed by others

• All travelers are members of at least one group
  – Travelers can be member to as many groups as necessary
Individual Group Membership

• Manual process for adding individual travelers to a group
  – Adding travelers one-by-one

• Only criteria needed is the traveler’s SSN
Global Group Membership

Used to make every traveler in an organization members of a specific group

Global Group Membership Requires:

• Name of Organization being added to Group (Member Organization Name)

• Name of Organization that owns the group (Group Organization Owner Name)

• Name of the appropriate group (Group Name)
Global Group Membership (continued)

<table>
<thead>
<tr>
<th>Member Organization Name</th>
<th>Group Organization Owner Name</th>
<th>Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>DA123ABC456EFG</td>
<td>DA</td>
<td>DA</td>
</tr>
<tr>
<td>DA123ABC456EFG</td>
<td>DA123</td>
<td>123</td>
</tr>
<tr>
<td>DA123ABC456EFG</td>
<td>DA123ABC</td>
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<tr>
<td>DA123ABC456EFG</td>
<td>DA123ABC456EFG</td>
<td>EFG</td>
</tr>
</tbody>
</table>
Summary

• People
  – Profiles
  – Permission Levels
  – Access
  – User Roles

• Routing Lists
  – Manual Stamps
  – System Generated Stamps
  – Conditional Routing

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Resources

**DTMO Website**
- Access eLearning, instructor resources, and reference materials through Training Resource Lookup Tool
  - [www.defensetravel.dod.mil](http://www.defensetravel.dod.mil)

**Travel Explorer (TraX)**
- DTA Manual: Chapter 5 – Routing Lists; Chapter 6 – Groups; Chapter 7 – People
- Distance Learning Courses: DTA Maintenance Tool – People, Routing Lists, Groups
  - [www.defensetravel.dod.mil/Passport](http://www.defensetravel.dod.mil/Passport)

**Travel Assistance Center (TAC)**
- 1-888-Help1-Go (1-888-435-7146)
- Overseas: Use DSN to dial directly
- 24 hours a day/7 days a week
- Submit a Help Ticket through the Tickets section of TraX