CHAPTER 12: ROA AND ROA ADMINISTRATION

The Read-Only Access (ROA) Administration feature is used to assign roles and access to DTS ROA. ROA access allows users to see information, but does not allow any changes to be made.

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12.1 ROA Roles and Administration

There are two ROA roles in DTS; each role reflects a different level of use:

- **ROA User** - This individual has access to Trip and Invoice data for specific organization(s) to which the user has been granted ROA access. The user may view authorizations, vouchers, local vouchers, Centrally Billed Account (CBA) invoices, and charge card vendor (CCV) invoices.
- **ROA Administrator** – This individual has access to an organization and any sub-organizations. The ROA Administrator may grant, update and remove ROA users as well as other ROA Administrators.

*The Defense Travel Management Office (DTMO) is the ROA Administrator for Agency, Joint Command or any service requesting organization access outside their service.

ROA users may access the following two features through the ROA module:

- **Invoices** – View CBA and CCV invoices.
- **Trip** – View information on travel documents.

ROA Administrators can access the ROA Administration feature in the DTA Maintenance Tool.
Users who have ROA access will see ROA on the menu bar of the DTS User Welcome screen (Figure 12-1). Users can view trip data and invoices for their organizations. The default setting includes sub-organizations, however the ROA Administrator can limit the user's access to a single organization or sub-organization.

Figure 12-1: DTS User Welcome Screen - ROA Menu
12.1.1 View Invoices Using ROA

Beginning on the DTS User Welcome screen (Figure 12-1), follow the below steps to search for invoices to review:

1. Mouse over ROA on the menu bar and select Invoices.

The Read Only Access – Invoices Search screen opens (Figure 12-2).

2. Complete the search criteria fields in the top section of the screen.

3. Use the calendar icons to limit search results by date range.

4. Select the Report Type drop-down list and select the type of report:
   - Invoice Summary
   - Transaction Summary
   - Transaction Detail

5. Select the Invoice Type (CBA/CCV) drop-down list and select the type of invoice(s) to include in the report.


The results format depends on the Report Type selected from the drop-down list.
12.1.2 View Trip Data Using ROA

Beginning on the DTS User Welcome screen, follow the below steps to search for trips to review:

1. Mouse over ROA on the menu bar and select Trip.

The Traveler Lookup screen opens (Figure 12-3). This screen is used to search for the traveler whose document is to be viewed. The user may search for a traveler using any of the following:

- **Traveler SSN.** This option provides a limited search and will only display the name and SSN.

- **Traveler Name.** This search will also return a limited selection. This option will display all travelers who have the last name that was entered in the Last Name field. The First Name field is optional, but recommended when searching for a traveler with a common last name. If the full spelling of the traveler’s last name is unknown, entering the first few letters of the name will yield results of all travelers who match the entry. When the list is displayed, the user can select the traveler from the Search Results list.

- **Travel Authorization Number (TANUM).** The search by TANUM option will display the SSN and name of traveler associated with the document.

![Figure 12-3: Traveler Lookup Screen](image-url)
2. Complete the **Traveler SSN** field with the traveler’s SSN.
   -OR-
   Complete the **Last Name** field. (The First Name field is optional.)
   -OR-
   Complete the **TANUM** field.

3. Select **Search** next to the field that was completed.

   The Traveler Lookup screen refreshes with the search results displayed on the right side (Figure 12-4). It displays the names of any travelers who match the criteria that the user entered.

![Figure 12-4: Traveler Lookup Screen – Search Results](image)

4. Choose **select** to the right of the traveler’s name and SSN.
The screen refreshes (Figure 12-5). The selected traveler's name and partially masked SSN display at the bottom of the screen, along with four buttons at the bottom of the page identifying different types of documents. Documents that are not applicable will appear grayed out and cannot be selected.

**Figure 12-5: Traveler Lookup Screen - Traveler Selected**

5. Select the type of document to view.
The document list screen for the chosen type of document opens (Figure 12-6). The buttons near the top of the screen allow the user to view other document types for the traveler. By default, the documents in the list are sorted by Document Name. The user may select a column header to sort by Document Name, Status, or TA Number.

![Figure 12-6: Authorizations / Orders Document List Screen](image)

6. Select **print** to print a copy of the document.  
   -OR-  
   Select **view** to see the document on the screen.
If adjustments have been made to the document, the Adjustments screen opens (Figure 12-7).

![Adjustments Screen]

Figure 12-7: Adjustments Screen

7. Select **print** to print a copy of the document. The user may also select one of the buttons above the document list to print all versions, current and approved versions, and the document history. 
   -OR-
   Select **view** to review the document.
The Preview Trip screen opens when the view link is selected (Figure 12-8). Use the navigation bar to view any section of the document.

![Figure 12-8: Preview Trip Screen](image-url)

<table>
<thead>
<tr>
<th>Logged In As:</th>
<th>Document Name: EW:COLORADO:PR101:413:AO1</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Name:</td>
<td>Document Type: Authorization (OA)</td>
</tr>
<tr>
<td>Screen ID:</td>
<td>Close Window:</td>
</tr>
<tr>
<td>Screen:</td>
<td>Help for this screen:</td>
</tr>
</tbody>
</table>

**Preview Trip**

Review the details for this trip below. To make edits, click on the links at the left to return to that section. If you have no changes proceed to Other Authorizations.

DoD mandates split disbursement for transportation, lodging, and rental car expenses. [Click here for memorandum](#).

**Reference Information**

| Reference:
|--------------------------------|

**Document Comments**

| Comments to the Approving Official: | None |

| Comments from the Travel Agent: |

The use of a Government-Contracted Commercial Travel Office (CTO) to arrange official travel is mandatory. If the contracted CTO is not used to make official travel arrangements, the traveler must provide a statement in detail as to exactly why the CTO is not available or otherwise not being used.

**Other Trip Information**

<table>
<thead>
<tr>
<th>Trip Type:</th>
<th>AA ROUTINE TDY/TAO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip Purpose:</td>
<td>SITE VISIT</td>
</tr>
<tr>
<td>Trip Description:</td>
<td></td>
</tr>
</tbody>
</table>

**Overall Starting Point Time Zone: EST (-05)**

**Location 1: COLORADO SPRINGS, CO Time Zone: MST (-07)**

**Overall End Point Time Zone: EST (-05)**

*Figure 12-8: Preview Trip Screen*
12.1.2.1 Sample ROA Screens

This section shows some of the common screens that a user with ROA access may view.

The Trip Overview screen displays an overview of the trip on the left side of the screen and a summary of reservations on the right (Figure 12-9). Select a View link in the far right column of the Trip Summary to display a screen that shows details of the selected item.

![Figure 12-9: Trip Overview Screen](image-url)
The Trip Summary screen provides information about flights and other reservations such as lodging and rental car (Figure 12-10).

Figure 12-10: Trip Summary Screen
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The Non-Mileage Expenses screen shows a summary of the trip expenses on the right side of the screen (Figure 12-11).

![Figure 12-11: Non-Mileage Expenses Screen](image)

Figure 12-11: Non-Mileage Expenses Screen
The Per Diem Entitlements screen displays per diem entitlements for lodging, duty conditions, meals, and leave (Figure 12-12).

Figure 12-12: Per Diem Entitlements Screen
The Substantiating Records screen may be used to view receipts or other documents the traveler has attached to the document (Figure 12-13).

Figure 12-13: Substantiating Records Screen

12.2 ROA Administration and the DTA Maintenance Tool

Administrators responsible for maintaining access to ROA at their site will use the DTA Maintenance Tool to perform these functions. Beginning on the DTS User Welcome screen, follow the below steps to access the ROA Administration feature in the DTA Maintenance Tool:
1. Mouse over Administrative on the menu bar and select DTA Maintenance Tool (Figure 12-14).

The DTA Maintenance Tool Home page opens.

2. Select the DTA Tools drop-down list and select ROA Administration (Figure 12-15).
The Search Existing ROA User screen opens by default (Figure 12-16).

![Search Existing ROA User Screen](image)

Figure 12-16: Search Existing ROA User Screen

### 12.2.1 Create a New ROA User or ROA Administrator

To create a new ROA user or ROA Administrator means to add ROA to an existing DTS user’s access. Follow the steps in Section 12.2 to access the ROA Administration feature.

Beginning on the Search Existing ROA User screen, follow the below steps to create a new ROA user or ROA Administrator:

1. Select **Create New ROA User**.

   The Search New ROA User screen opens (Figure 12-17).

![Search New ROA User Screen](image)

Figure 12-17: Search New ROA User Screen

2. Complete the **SSN** field with the SSN of the DTS user to whom ROA should be granted.
   - OR -
   Complete the **Last Name** field with the last name of the DTS user to whom ROA should be granted.
3. (Optional) If the **Last Name** field was used, the **First Name** field will narrow the search results.

4. Select **Search**.

The New ROA User (Search Results) screen opens (Figure 12-18). It displays the names of DTS users who match the search criteria.

![New ROA User (Search Results) Screen](image)

Figure 12-18: New ROA User (Search Results) Screen

5. Select **Create** next to the name of the person to whom ROA should be granted.

The Create ROA User (User Only) screen opens.

**Note:** Although the screen name implies it is for ROA users only, this screen is also used to create ROA Administrators.

6. Select the **User Access** drop-down list and select the type of access the user will have (Figure 12-19).
7. Choose Select Organizations.

The Edit ROA User Organization Access screen opens (Figure 12-20).

8. Select the name of an organization to which the user will receive access (left side of the screen).

9. Select Add.
The name of the organization displays on the right side of the screen as a selected organization (Figure 12-21). Granting ROA access to a user for an organization also gives the user access to all sub-organizations that are associated with that organization.

Figure 12-21: Edit ROA User Organization Access Screen – Organization Selected

10. Repeat Steps 9 and 10 for each organization that needs to be added.

11. If it is necessary to remove an organization from the user’s ROA, select the organization name from the list in the Selected Organization column on the right side of the screen, then select Remove.

12. Select Save and Continue.
The Create ROA User (User Only) screen opens with the organization name(s) displayed (Figure 12-22). Organizations may be added or removed by choosing Select Organizations and repeating the above process.

Figure 12-22: Create ROA User (User Only) Screen – Organization Name Displayed

13. Select Save User.

The New ROA User (Search Results) screen opens (Figure 12-18).
12.2.2 Update a User’s ROA Access

The type of access for ROA and the organizations to which a user has access can be updated at any time.

1. Access the ROA Administration feature by following the steps in Section 12.2.

   The Search Existing ROA User screen opens by default (Figure 12-16).

2. Complete the **SSN** field with the SSN of the user whose access needs to be updated.  
   -OR-  
   Complete the **Last Name** field with the last name of the user whose access needs to be updated (Figure 12-23).

3. (Optional) If the Last Name field was used, complete the **First Name** field with the first name of the user whose access needs to be updated.

4. Select **Search**.

   The Existing ROA User (Search Results) screen opens (Figure 12-24).

5. Select **Update** next to the name of the user whose access needs to be modified.
The Update ROA User (User Only) screen opens (Figure 12-25).

![Figure 12-25: Update ROA User (User Only) Screen](image)

6. If necessary, select the **User Access** drop-down list and select the **type of access** to change the access for the ROA user.

7. For instructions on changing a user’s ROA organization access, see Section 12.2.1, beginning with Step 8.

8. Select **Save Changes**.
   -OR-
   Select **Cancel** to exit the screen without changing the user’s ROA access.

The Existing ROA User (Search Results) screen opens.
12.2.3 Remove a User's ROA Access

Removing a user's access to ROA or ROA Administration does not remove the individual from DTS. It only removes the access to ROA. To begin removing a user’s access, follow the below steps:

1. Follow Steps 1 through 4 in Section 12.2.2.

The Existing ROA User (Search Results) screen opens (Figure 12-24).

2. Select **Remove** next to the name of the user whose access needs to be deleted.

The Delete ROA User screen opens (Figure 12-26).

3. Select **Delete**.
   - OR-
   Select **Cancel** to cancel the removal and keep this user's ROA intact.

The Existing ROA User (Search Results) screen opens (Figure 12-27). The user's name is no longer listed if Delete was selected on the previous screen.
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