CHAPTER 5: ROUTING LISTS

A routing list in DTS establishes the path for electronic processing of documents. A routing list identifies officials with authority to conduct reviews, certify funds, and approve travel documents.

5.1 Routing Lists
   5.1.1 Default Routing Lists
   5.1.2 Multiple Routing Lists
   5.1.3 Conditional Routing
   5.1.4 Modifying Routing Lists

5.2 Routing Officials
   5.2.1 COs and AOs
   5.2.2 Alternate Routing Officials
   5.2.3 Delegate Signature Authority

5.3 Stamps, Status Codes, and Action Codes

5.4 Minimum Routing List Requirements

5.5 Organization Chart and Routing List Example

5.6 DTA Maintenance Tool and Routing Lists
   5.6.1 Search for Routing Lists
   5.6.2 Update Routing Lists
       5.6.2.1 Add Routing Elements From Inside the Organization
       5.6.2.2 Add Routing Elements External to the Organization
       5.6.2.3 Add Conditional Routing Elements
       5.6.2.4 Remove Routing Elements
   5.6.3 Copy Routing Lists
   5.6.4 Delete Routing Lists
   5.6.5 Create a Routing List

5.7 Global Routing Maintenance
   5.7.1 Add Routing Elements to Multiple Routing Lists
   5.7.2 Remove Routing Elements From Multiple Routing Lists
   5.7.3 Replace Signature Authority on Multiple Routing Lists

5.8 Create a Routing List for a Self-AO
   5.8.1 Designate a Traveler as a Self-AO
   5.8.2 Identify a Traveler as an AO in the Routing List

5.9 Assign Routing Lists to People

5.10 View a List of Routing Lists

5.11 View Delegated Authorities List
5.1 Routing Lists

A routing list specifies the electronic routing of documents by identifying who must apply a particular DTS stamp to a document.

Defense Travel Administrators (DTAs) with permission levels 1 and 5 create routing lists to follow the structure of the organization. The DTA can assign a default routing list to traveler profiles in an organization in one step. A relationship between the Routing Official who reviews and approves authorizations, and the organization where the traveler receives administrative support is recommended.

Each organization must have at least one routing list to serve each of the three types of documents: authorization, voucher, and local voucher. Group authorizations fall under the document type authorization. Each element in a routing list has the following components:

- **Document status.** The current condition based on actions that have been completed.
- **Signature name.** The name of the Routing Official who applies the stamp. Only the name appears on the routing list.
- **Level.** The level indicates the stop along the document's route to its final step. The level is matched with the document status stamp, and is associated with the Routing Official who applies that stamp.

As stated above, each level in a routing list is a stop on the document's electronic routing process. The numbers show the sequence in which stamps are applied to a document. Although the level numbers are sequential, they do not have to be consecutive. Future maintenance will be easier if these level numbers are assigned to stamps in multiples of five or 10. Leaving gaps in the level numbering (5, 10, 15) allows DTAs to add stamps in the future without changing the numbers already assigned. For instance, if a routing list has a REVIEWED stamp at level 5, and an APPROVED stamp at level 10 there is space to add another stamp at Level 8. Only the levels assigned to the CTO SUBMIT and CTO BOOKED stamps need to be in consecutive order with no gap. These two stamps must be adjacent for documents to route correctly. For example, if CTO SUBMIT occurs at level 2, CTO BOOKED must follow as level 3. The next level in the routing list, such as REVIEWED, can be level 10 with CERTIFIED at level 15 and the APPROVED stamp at level 20. The highest level cannot exceed 30.

5.1.1 Default Routing Lists

Each organization must have one routing list designated as the default. The default routing list should serve all document types. The DTA may update or replace the default routing list at any time. Travelers may also change the routing lists on any documents that need to be routed differently.

5.1.2 Multiple Routing Lists

By using more than one routing list, DTAs may tailor routing to the organization's workflow process for TDY documents. Routing lists may be created in each organization for standard functions such as approval of orders for training travel, medical travel, and funeral detail travel. Other situations may need separate routing lists (e.g., arrangements-only travel, invitational travel and other trip types).
5.1.3 Conditional Routing

DTAs can tailor document routing to include a conditional route, meaning that if certain conditions exist, an additional level is added to the normal routing. If the condition does not exist, the step specified in the routing will be circumvented. The process of identifying such conditions is called a routing test.

The conditional lists that are available are shown below. See Section 5.6.2.3 for more information on the Process Names.

- Bypass PNR
- Foreign Travel
- OCONUS/CONUS
- OCONUS/OCONUS
- Premium Class Fare
- Special Circumstances
- Travel Mode Route
- Traveler Number
- Leave Requested (displays for vouchers only)

Conditional routing can be used for any travel document, and is optional for an organization. Additional steps, and the associated stamps and signature names, can be inserted in an existing routing list at the appropriate point before routing to the Authorizing Official (AO).

See Appendix K, Table K-10: Conditional Routing, Preaudits, and Electronic Processing Audits for more information on routing tests.

5.1.4 Modifying Routing Lists

When a traveler creates an authorization, DTS copies the profile, which includes the routing list name, into the document. The details of the routing list can be viewed and modified by using the Routing List feature in the DTS Maintenance Tool.

If a document has begun the electronic routing process, and the routing list has been modified, the traveler or a user with access to the traveler’s documents must re-sign the document. This creates an adjustment, and the routing process restarts using the new routing list.

DTAs may update multiple routing lists at one time by using Global Routing Maintenance. Section 5.7 explains how to add or remove routing elements, or replace signature authority to more than one routing list at once.
5.2 Routing Officials
Routing Officials must have permission levels 0 and 2. These permission levels permit Routing Officials to prepare documents and use the Route and Review functions. Permission levels 0 and 2 also give Routing Officials access to their assigned stamp in the routing list and other stamps, such as SIGNED, RETURNED, and CANCELLED.

The Routing Official does not need to be a member of the traveler's organization. To add a Routing Official to a routing list who is outside the organization, the DTA must have the individual's SSN.

5.2.1 COs and AOs
The CO is responsible for certifying and adjusting obligations and disbursement of funds associated with a travel document. The AO is considered to be responsible for approving the need to travel. An AO also acts as a CO when approving payments, to include authorizations that include a request for a non-ATM advance or a scheduled partial payment (SPP).

In organizations where the CO and the AO are the same person, the APPROVED stamp is used. In cases where the CO and AO role is separated, the CERTIFIED stamp is used by the CO, and the APPROVED stamp is used by the AO. In all cases, the APPROVED stamp is the final stamp applied to a document.

The CO and AO must complete required training and be appointed in writing (DD Form 577) to serve in this role. See Chapter 3 of this manual for more information.

5.2.2 Alternate Routing Officials
The document routing list should have more than one person available at each level. Having alternates in place is helpful in situations where the responsibility is shared or where the primary is unavailable. Multiple Routing Officials may be assigned to the same stamp and level in a routing list.

5.2.3 Delegate Signature Authority
Routing Officials at any level can delegate their signature authority to another during an absence. The delegated official will receive an e-mail notification that a document needs action. When the delegated official completes the action for the document, DTS removes the document from all other queues for that level. When selecting a delegate, choose from the list of organization members with permission level 2. Signature authority can only be delegated to those who have the same permission levels. The signature authority remains delegated until it is removed.

Note: Delegated officials acting in the same capacity as a CO or AO must complete required training and be appointed in writing (DD Form 577).
5.3 Stamps, Status Codes, and Action Codes

DTS uses the terms *stamp* and *status code* interchangeably. The stamp used when signing the document becomes the current status code of the document. DTS uses status codes for a variety of electronic processing functions to accomplish the following:

- Indicate the steps of the electronic approval process
- Indicate system-generated actions taken
- Select as criteria for travel reports
- Record the history of a document

Every time a document is stamped, DTS records it in the document history with the status code, user name, date, and time. A stamp may or may not have action code(s) assigned to it. Each action code causes a specific electronic procedure to occur. Action codes initiate actions such as *route* (sends the document to the Routing Official(s) at the next level of the routing list) and *emailtrav* (sends an e-mail notification to the traveler).

There are more than 20 action codes associated with the various types of documents. The list of stamps and the relationship of action codes assigned to each stamp is preset. See Appendix K, Table K-6: Stamp Tables (Status Codes) for a complete list of status codes and descriptions.

5.4 Minimum Routing List Requirements

The minimum status codes for a routing list are as follows:

- **CTO SUBMIT** (Level 2 or 3). This routes the authorization or group authorization to the CTO when the traveler uses the Travel module in DTS to make travel arrangements.
- **CTO BOOKED** (Level 3 or 4). This indicates that the CTO has quality controlled the reservation requests or made travel arrangements for the traveler.
- **APPROVED** (Final level). APPROVED is the last stamp in the routing list. APPROVED has the action of COMPLETE, FUND, and PNR TICKET.

The only status code required for a voucher or local voucher routing list is APPROVED. APPROVED is the last stamp in the routing process. This stamp has the action of COMPLETE and VFUND for vouchers, and LFUND for local vouchers.

5.5 Organization Chart and Routing List Example

A sample organization chart with a breakdown of a typical DTS organization naming sequence and the typical routing lists associated with that organization is shown in Figure 5-1 and Table 5-1. There are specific names for each default routing list and secondary routing list for each suborganization. The organization responsible for the routing list is the owner of that routing list. The routing list ROUTINE, shown in Table 5-1, uses multiple officials at the REVIEWED and APPROVED levels of the routing process. The levels are sequential and not consecutive, with gaps in between the routing sequence. Leaving space in between the routing sequence allows levels to be added later, if necessary.
Note: The organization naming structure for services and agencies in this manual are for training purposes only and are subject to change. Appendix Q provides the current version for each service and agency.
**Routing List Name:** ROUTINE

**Table 5-1: 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><strong>CTO SUBMIT</strong></td>
<td>3</td>
<td>BYPASS PNR*</td>
</tr>
<tr>
<td>AUTH</td>
<td>CTO BOOKED</td>
<td><strong>CTO BOOKED</strong></td>
<td>4</td>
<td>BYPASS PNR*</td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>Shelly Smith</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>REVIEWED</td>
<td>Sidney Carson</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>AUTH</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>LCVH</td>
<td>REVIEWED</td>
<td>Shelly Smith</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LCVH</td>
<td>REVIEWED</td>
<td>Sidney Carson</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LCVH</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>LCVH</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>REVIEWED</td>
<td>Shelly Smith</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>REVIEWED</td>
<td>Sidney Carson</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>VCH</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>
5.6 DTA Maintenance Tool and Routing Lists

DTAs are responsible for maintaining their site's routing lists. This section will assist the DTA to find, update, delete, copy, and create routing lists.

To access the DTA Maintenance Tool, select it from the Administrative drop-down list on the User Welcome screen. The DTA Maintenance Tool Home page opens.

To perform functions related to routing lists, select Routing Lists from the drop-down list (Figure 5-2). The Routing Lists feature allows users to create and maintain routing list data. DTAs can create, update, copy, and delete routing lists for the organizations they have access to.

![Figure 5-2: DTA Maintenance Tool Home Page](image-url)
5.6.1 Search for Routing Lists

To update, copy, or delete a routing list, the DTA must perform a search. When the DTA selects Routing Lists from the drop-down list, the Search Routing Lists screen opens (Figure 5-3). The highest-level organization to which the DTA has access displays as the default in the Organization Name text box. From here the DTA may search for an existing routing list, select the link to the Create Routing List(s) screen, view a list of all routing lists for an organization, or view a delegated authorities list. See Table 5-2 for a list of the Search Routing List(s) screen field names and their descriptions.

Follow these steps to search for a routing list:

1. Complete the Routing List Name field with all or part of the name of the routing list to be found. If this field is left blank, all available routing lists for the selected organization will display once “Search” is selected.

2. Enter the first four or more characters of the organization’s name in the Organization Name field to display a list to select from.

3. Check the Include Sub-Organizations check box to view all of the routing lists in the hierarchical setup below the organization entered in Step 2.

4. Select the Default Routing Lists Only check box to view default routing lists.

Figure 5-3: Search Routing List(s) Screen
5. Select Search.

Table 5-2: Search Routing List(s) Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routing List Name</td>
<td>Label that identifies the routing list to use for a particular document.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Field in which to enter the first four or more characters of the organization’s name to display a list to select from. User’s main organization displays by default.</td>
</tr>
<tr>
<td>Include Sub-Organizations</td>
<td>Check box that, when checked, causes DTS to include sub-organizations in the search.</td>
</tr>
<tr>
<td>Default Routing Lists Only</td>
<td>Checkbooks that, when checked, causes DTS to display default routing lists only.</td>
</tr>
<tr>
<td>Search</td>
<td>Button used to initiate the search and display the search results.</td>
</tr>
</tbody>
</table>

The Routing List(s) (Search Results) screen (Figure 5-4) displays the routing lists that match the search criteria.

Figure 5-4: Routing List(s) (Search Results) Screen

See Table 5-3 for a list of the Routing List(s) Search Results screen field, column, and object names and their descriptions.
<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td>Name of the organization where the search was conducted.</td>
</tr>
<tr>
<td>Default Routing Lists Only</td>
<td>Identifier that displays Yes if the search results include default routing list names only. Displays No if the search results include all routing list names.</td>
</tr>
<tr>
<td>Include Sub-Organizations</td>
<td>Identifier that displays Yes if the search results include sub-organization names. Displays No if the search results do not include sub-organization names.</td>
</tr>
<tr>
<td>Select to Globally Update</td>
<td>Check box(es) used to add routing elements, remove routing elements, or replace signature authority to multiple routing lists at the same time.</td>
</tr>
<tr>
<td>Individually Edit</td>
<td>Column heading above buttons that provide the means to update, copy, or delete a routing list.</td>
</tr>
<tr>
<td>Update</td>
<td>Button used to change routing list information.</td>
</tr>
<tr>
<td>Copy</td>
<td>Button used to initiate the creation of a copy of a routing list in one organization and save it to another.</td>
</tr>
<tr>
<td>Delete</td>
<td>Button used to delete a routing list.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Column heading above the list of organizations (and sub-organizations, if selected) based on the search criteria for each routing list in DTS.</td>
</tr>
<tr>
<td>Routing List Name</td>
<td>Column heading above the routing list names for the organization based on the search criteria.</td>
</tr>
<tr>
<td>Default Routing List</td>
<td>Column heading above the indicators that identify whether or not the routing list is designated as a default routing list.</td>
</tr>
<tr>
<td>Add Routing Element</td>
<td>Button used to add routing elements to every routing list that is checked in the Globally Update column.</td>
</tr>
<tr>
<td>Remove Routing Element</td>
<td>Button used to remove routing elements from every routing list that is checked in the Globally Update column.</td>
</tr>
<tr>
<td>Replace Signature Authority</td>
<td>Button used to substitute a Routing Official with a new Routing Official in every routing list that is checked in the Globally Update column.</td>
</tr>
</tbody>
</table>
5.6.2 Update Routing Lists

Update, Copy, and Delete are the options in the Individually Edit column on the Routing List(s) (Search Results) screen (Figure 5-5). The following sections describe how to add and remove certain elements from a routing list.

5.6.2.1 Add Routing Elements From Inside the Organization

To add a Routing Official (from within the organization) to the routing list, use the below steps:

1. Search for the routing list to which the element will be added.
2. Select Update to open the routing list.

The Update Routing List screen opens (Figure 5-6).
3. Select **Add Routing Element** to add elements to the existing routing element.

The Add Routing Element screen opens.

4. Select the **Document Type** drop-down list and select the **document type**.

5. Select the **Document Status** drop-down list and select the **document status** (Figure 5-7).

![Add Routing Element Screen](image)

Figure 5-7: Add Routing Element Screen

6. Select **Search** to locate a Signature Name.

The Search People screen opens (Figure 5-8). See Table 5-4 for a list of the Search People screen field names and descriptions.

**Note:** If the official is outside of the DTA's organization structure, see Section 5.6.2.2.

![Search People Screen](image)

Figure 5-8: Search People Screen
Table 5-4: Search People Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td>Field in which to enter the first four or more characters of the organization’s name to display a list to select from. User’s main organization displays by default.</td>
</tr>
<tr>
<td>Include Sub-Organizations</td>
<td>Check box that, when checked, will include sub-organizations in the search.</td>
</tr>
<tr>
<td>SSN</td>
<td>SSN of the person. Either the SSN or the last name must be used to drive the search.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Field in which to enter all or part of the last name of the person. Either the SSN or the last name is required to drive the search.</td>
</tr>
<tr>
<td>First Name</td>
<td>Field in which to enter all or part of the first name of the person (optional).</td>
</tr>
<tr>
<td>Search</td>
<td>Button used to initiate the search.</td>
</tr>
<tr>
<td>Close Window</td>
<td>Button used to cancel the search.</td>
</tr>
</tbody>
</table>

7. Enter the name of the Routing Official’s organization in the **Organization Name** text field.

8. Enter the search criteria.

When searching for the Routing Official within the organization, the DTA may search by entering the Routing Official’s SSN (if known) or by entering all or part of the Routing Official’s last name (first name is optional).

9. Select **Search**.

The Search People Results screen opens (Figure 5-9).

10. Choose **Select** next to the name of the person whose signature will be associated with the document type.

This action completes the Signature Name field and closes the Search People Results screen.
See Table 5-5 for a description of the Search People Results screen.

Table 5-5: Search People Results Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td>Displays the name of the organization that was searched.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Displays the last name of the person for whom the DTA searched.</td>
</tr>
<tr>
<td>SSN</td>
<td>Identifier that displays the SSN of the person for whom the DTA searched if entered during search (first five digits masked).</td>
</tr>
<tr>
<td>Include Sub-Organization</td>
<td>Identifier that displays true if sub-organizations were searched. Displays false if sub-organizations were not searched.</td>
</tr>
<tr>
<td>First Name</td>
<td>Identifier that displays the first name of the person for whom the DTA searched (if entered during search).</td>
</tr>
<tr>
<td>Select Person</td>
<td>Column header for the buttons used to select the names displayed in the Search People Results screen.</td>
</tr>
<tr>
<td>Select</td>
<td>Button used to populate the Signature Name field and to close the Search screen.</td>
</tr>
<tr>
<td>Name</td>
<td>Column header for the list of names of the people matching the search criteria.</td>
</tr>
<tr>
<td>SSN</td>
<td>Column header for the list of SSNs of the people matching the search criteria.</td>
</tr>
<tr>
<td>Organization</td>
<td>Column header for the list of membership organizations of the people matching the search criteria.</td>
</tr>
<tr>
<td>Back to People Search</td>
<td>Button used to return to the Search People screen to conduct another search.</td>
</tr>
<tr>
<td>Close Window</td>
<td>Button used to exit this search.</td>
</tr>
</tbody>
</table>

11. Enter the number (e.g., 5, 10, 15, 20) in the **Level** field to indicate the sequence in the routing list (Figure 5-10).

![Add Routing Element Screen](Figure 5-10: Add Routing Element Screen)
Leaving gaps in between the levels allows future additions. It is recommended that routing lists be created with level numbers assigned in increments of five.

12. Select the **Process Name** drop-down list to select a value from the list if conditional routing is required. Otherwise leave this field blank.

13. Select **Add Routing Element**.

14. Repeat steps 3 through 13 if additional routing elements are required.

15. Select **Save Changes** once all edits have been made (Figure 5-11).

![Update Routing List](image)

**Figure 5-11: Update Routing List Screen**

The DTA may assign multiple officials to the same stamp and sequence number in a routing list. This action ensures that the organization has sufficient backups for Routing Officials. When creating the routing list, repeat the sequence number for the same stamp, entering the name and SSN of another Routing Official. Each Routing Official at the same sequence number receives simultaneous notification of the document in the queue. When a Routing Official stamps the document, DTS removes the document from the other queues.
Note: If a routing list does not have the CTO SUBMIT and CTO BOOKED stamps, a Populate CTO Stamps button displays (Figure 5-12). Select this button to add CTO SUBMIT at level 2 and CTO BOOKED at level 3 of the routing list.

![Update Routing List](image)

Figure 5-12: Update Routing List Screen - Populate CTO Stamps Button

5.6.2.2 Add Routing Elements External to the Organization

The Xorg Search allows a DTA to add a person from an external organization (Xorg) to a routing list by using the individual’s SSN. Use the below steps to accomplish this task:

**Note:** This option differs from the Cross-Organization Funding routing list. The Finance DTA (FDTA) designates a routing list using the Lines of Accounting feature, not the Routing Lists feature. See Chapter 8 of this manual for more information.

1. Use the steps described in Section 5.6.1 to search for the routing list.
2. Select **Update** to open the routing list.
3. Select **Add Routing Element** to add elements to the existing routing list.
4. Select the **Document Type** drop-down list and choose the **document type**.
5. Select the **Document Status** drop-down list and choose the **document status** (Figure 5-13).

![Add Routing Element](image1)

**Figure 5-13: Add Routing Element Screen**

6. Select **Xorg Search**.

The Xorg Search People screen opens (). See Table 5-6 for a description of the Xorg Search People screen.

![Search People](image2)

**Figure 5-14: Xorg Search People Screen**
Table 5-6: Xorg People Search Screen Descriptions

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>SSN</td>
<td>Field in which to enter the SSN to search for individual from an outside organization.</td>
</tr>
<tr>
<td>Search</td>
<td>Button used to initiate the search outside of the DTAs organization.</td>
</tr>
<tr>
<td>Close Window</td>
<td>Button used to exit the search.</td>
</tr>
</tbody>
</table>

The Xorg Search People screen searches by SSN only. The DTA must enter the Routing Official’s SSN to conduct this type of search.

7. Enter the **SSN** of the appropriate Routing Official.

8. Select **Search**.

The Search People Results screen displays the Routing Official’s name and SSN (Figure 5-15).

<table>
<thead>
<tr>
<th>Select Person</th>
<th>Name</th>
<th>SSN</th>
<th>Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select</strong></td>
<td>Hamilton, Tenka</td>
<td>999009021</td>
<td>HPMO</td>
</tr>
</tbody>
</table>

Figure 5-15: Search People Results Screen

9. Choose **Select** next to the name of the person whose signature name is to be added to the routing list.
The Add Routing Element Screen opens and displays the signature name of the person (Figure 5-16).

10. Enter the number in the **Level** field to indicate the step in the routing list.

11. Select the **Process Name** drop-down list to select a value from the list if conditional routing is required.

12. Select **Add Routing Element**.

13. Repeat Steps 3 through 12 if additional elements are required.

14. Select **Save Changes** once all routing elements have been added to the selected routing list.

### 5.6.2.3 Add Conditional Routing Elements

When certain conditions exist, DTS uses the process name to route documents to designated individuals. These steps can be used to add elements for conditional routing with the exception of:

- Special Circumstances (See Section 5.6.2.3.1)
- Travel Mode (See Section 5.6.2.3.2)
- Leave Requested (See Section 5.6.2.3.3)

1. Search for the routing list that requires the addition of conditional routing element(s).

2. Select **Update** to open the routing list.
The Update Routing List screen opens (Figure 5-17).

Figure 5-17: Update Routing List Screen

3. Select **Add Routing Element**.

The Add Routing Element screen opens.

4. Select the **Document Type** drop-down list and choose the **document type**.

5. Select the **Document Status** drop-down list and choose the **document status** for this level.

6. Search for the name to select for the Signature Name field. (For instructions, see Sections 5.6.2.1 or 5.6.2.2.)

7. Enter the number in the **Level** field to indicate the step in the routing sequence.
8. Select the **Process Name** drop-down list to choose one of the conditional routing values from the list (Figure 5-18).

![Add Routing Element](image)

Figure 5-18: Update Routing Element Screen - Process Names

The process names are described in Table 5-7.

**Table 5-7: Process Name Descriptions**

<table>
<thead>
<tr>
<th>PROCESS NAME</th>
<th>PROCESS NAME DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>BYPASS PNR</td>
<td>Applies if the Travel module is not used to make reservations. In such a case, the authorization will not require CTO processing.</td>
</tr>
<tr>
<td>FOREIGN TRAVEL</td>
<td>Applies if the traveler's duty station is CONUS, e.g., California to Korea or Virginia to Japan.</td>
</tr>
<tr>
<td>OCONUS/CONUS</td>
<td>Applies if the traveler's duty station is an OCONUS location and one or more TDY locations on the document are CONUS, e.g., Germany to Virginia.</td>
</tr>
<tr>
<td>OCONUS/OCONUS</td>
<td>Applies if the traveler's duty station is an OCONUS location and one or more TDY locations on the document are OCONUS and not in the same country, e.g., Germany to Austria. Also applies to those stationed in non-foreign U.S. territories and OCONUS states.</td>
</tr>
<tr>
<td>PREMIUM CLASS FARE</td>
<td>Used when policy allows purchase of premium air fares.</td>
</tr>
<tr>
<td>SPECIAL CIRCUMSTANCES</td>
<td>Checks the Special Circumstances trip type used and routes the document to the designated Routing Official. See Section 5.6.2.3.1.</td>
</tr>
</tbody>
</table>
9. Select Add Routing Element to save the changes.

10. Select Save Changes when all routing elements have been added to the routing list.

Figure 5-19 is an example of a Process Name that was added to this specific routing list. If a document is created that has a Foreign Travel location in the itinerary, the document will be routed to Helen West who will review the document because Foreign Travel was identified, and finally to the person who will apply the APPROVED stamp to the document.

![Update Routing List](image-url)

**Table 5-7: Process Name Descriptions (continued)**

<table>
<thead>
<tr>
<th>PROCESS NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRAVEL MODE ROUTE</td>
<td>Checks the transportation mode used during TDY travel and routes the document to the designated Routing Official for that transportation mode. See Section 5.6.2.3.2.</td>
</tr>
<tr>
<td>TRAVELER NUMBER</td>
<td>Checks the number of travelers in a group authorization and routes the document to the Transportation Officer (TO) if the group exceeds 9 travelers.</td>
</tr>
<tr>
<td>LEAVE REQUESTED</td>
<td>Checks the voucher for annual or non-duty leave and routes the voucher to the applicable Routing Official. See Section 5.6.2.3.3. This option is available for vouchers only.</td>
</tr>
</tbody>
</table>

**Figure 5-19: Sample Routing List With a Conditional Element**
5.6.2.3.1 Conditional Routing for Special Circumstances

Special Circumstances Travel (SCT) eligibility is typically determined by the medical, or other authorities rather than the AO. Therefore, conditional routing may be used to route the document to the appropriate Routing Officials. Beginning on the Update Routing List screen, use the below steps to accomplish this:

1. Select **Add Routing Element**.

2. Select the **Document Type** drop-down list and choose the **document type**.

3. Select the **Document Status** drop-down list and choose the **document status**.

4. Search for the name of the Routing Official to be placed in the Signature Name field. (For instructions, see Sections 5.6.2.1 or 5.6.2.2.)

5. Type the number in the **Level** field to indicate the sequence in the routing list.

6. Select the **Process Name** drop-down list and choose **SPECIAL CIRCUMSTANCES** (Figure 5-20).

![Add Routing Element Screen - Special Circumstances](image-url)
The screen refreshes and displays the SCT trip types (Figure 5-21). See the *DTS Document Processing Manual*, Chapter 11 for information on SCT trip types.

7. Check the **Special Circumstances** boxes for this routing element.

8. Select **Add Routing Element** to save.

9. Select **Save Changes** after adding all routing elements to the selected routing list.

### 5.6.2.3.2 Conditional Routing for Travel Mode

Travel modes are used to claim transportation expenses incurred during TDY travel. Certain travel modes are associated with specific expense categories that may be allocated to different LOAs, depending on the organization. In such cases, there may be a reason to route documents with different types of transportation to different TOs. Beginning on the Update Routing List screen, use the below steps to accomplish this:

1. Select **Add Routing Element**.

2. Select the **Document Type** drop-down list and choose the **document type**.

3. Select the **Document Status** drop-down list and choose the **document status**.
4. Search for the name of the official to be placed in the Signature Name field.

5. Type the number in the Level field to indicate the sequence in the routing list.

6. Select the Process Name drop-down list and choose Travel Mode Route (Figure 5-22).

![Add Routing Element](image1)

**Figure 5-22: Add Routing Element Screen - Travel Mode Route**

The screen refreshes and displays the Travel Modes.

7. Select the Travel Mode elements for this routing element (Figure 5-23). See Table 5-8 for descriptions of Travel Modes.

![Add Routing Element](image2)

**Figure 5-23: Update Routing List Screen - Travel Modes**
Table 5-8: Travel Modes

<table>
<thead>
<tr>
<th>MODE</th>
<th>DESCRIPTION</th>
<th>EXPENSE CATEGORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>Commercial Auto TDY/TAD</td>
<td>RENTAL CAR</td>
</tr>
<tr>
<td>CB</td>
<td>Commercial Bus</td>
<td>COM. CARR.-I</td>
</tr>
<tr>
<td>CF</td>
<td>CTO FEE (IBA)</td>
<td>COM.CARR.-I</td>
</tr>
<tr>
<td>CF-C</td>
<td>CTO FEE (CBA)</td>
<td>COM.CARR.-C</td>
</tr>
<tr>
<td>CP</td>
<td>Commercial Plane</td>
<td>COM. CARR.-I</td>
</tr>
<tr>
<td>CP-C</td>
<td>Commercial Plane (CBA)</td>
<td>COM. CARR.-C</td>
</tr>
<tr>
<td>CR</td>
<td>Commercial Rail (IBA)</td>
<td>COM. CARR.-I</td>
</tr>
<tr>
<td>CR-C</td>
<td>Commercial Rail (CBA)</td>
<td>COM. CARR.-C</td>
</tr>
<tr>
<td>CV</td>
<td>Commercial Vessel</td>
<td>COM. CARR.-C</td>
</tr>
<tr>
<td>GA</td>
<td>Government Auto</td>
<td>TRANSPORT</td>
</tr>
<tr>
<td>GB</td>
<td>Government Bus</td>
<td>TRANSPORT</td>
</tr>
<tr>
<td>GP</td>
<td>Government Plane</td>
<td>TRANSPORT</td>
</tr>
<tr>
<td>GV</td>
<td>Government Vessel</td>
<td>TRANSPORT</td>
</tr>
<tr>
<td>PA</td>
<td>Private Auto TDY/TAD</td>
<td>MILEAGE</td>
</tr>
<tr>
<td>PM</td>
<td>Private Motorcycle TDY/TAD</td>
<td>MILEAGE</td>
</tr>
<tr>
<td>PP</td>
<td>Private Plane</td>
<td>MILEAGE</td>
</tr>
<tr>
<td>PV</td>
<td>Private Vessel</td>
<td>MILEAGE</td>
</tr>
<tr>
<td>TB</td>
<td>Prepaid Bus</td>
<td>COM. CARR.-T</td>
</tr>
<tr>
<td>TP</td>
<td>Prepaid Plane</td>
<td>COM. CARR.-T</td>
</tr>
<tr>
<td>TR</td>
<td>Prepaid Rail</td>
<td>COM. CARR.-T</td>
</tr>
<tr>
<td>TV</td>
<td>Prepaid Vessel</td>
<td>COM. CARR.-T</td>
</tr>
</tbody>
</table>

8. Select **Add Routing Element** to save.

9. Select **Save Changes** after adding all routing elements to the chosen routing list.
5.6.2.3.3 Conditional Routing for Leave Requested

If the conditional routing element LEAVE REQUESTED has been specified in a routing list for the voucher, and at least one day in the itinerary contains annual or non-duty leave, DTS routes the voucher to the Routing Official specified in the routing list at the level indicated. See the Document Processing Manual, Section 2.7.3 to find how to indicate leave in an authorization, or Section 4.5.3 for guidance on indicating leave in a voucher.

To add the LEAVE REQUESTED element to a routing list, begin on the Update Routing List screen and use the below steps:

1. Select Add Routing Element.

   The Add Routing Element screen opens.

2. Select the Document Type drop-down list and choose Voucher.

3. Select the Document Status drop-down list and choose REVIEWED.

4. Search for the name of the official to be placed in the Signature Name field. (For instructions, see Sections 5.6.2.1 or 5.6.2.2.)

5. Enter the number in the Level field to indicate the sequence in the routing list.

6. Select the Process Name drop-down list and choose LEAVE REQUESTED (Figure 5-24).

   Figure 5-24: Add Routing Element Screen - Leave Requested

7. Select Add Routing Element.
Chapter 5: Routing Lists

The Update Routing List screen opens (Figure 5-25).

Figure 5-25: Update Routing List Screen - Leave Requested

8. Select Save Changes.

5.6.2.4 Remove Routing Elements

To delete routing elements from a routing list, use the below steps:

1. Search for the routing list to be updated.

2. Select Update to open the routing list.

The Update Routing List screen opens (Figure 5-26).

Figure 5-26: Update Routing List Screen - Remove Routing Element

3. Select Remove for the routing element to be deleted.
5. Repeat the step above for each element to be removed from the selected routing list.

5. Select **Save Changes** when all routing element updates are complete.

### 5.6.3 Copy Routing Lists

The Copy Routing List button permits a DTA to make a copy of an existing routing list and save it to another organization. DTS will copy the routing list name and all of its elements. After copying the routing list, the DTA may use the Update button to make changes to the new routing list. Use the steps in Section 5.6.1 to search for the routing list to be copied. Beginning on the Routing List(s) (Search Results) screen, use the below steps to copy a routing list:

1. Select **Copy** to choose the routing list to copy (Figure 5-28).

---

**Figure 5-27: Update Routing List Screen - Remove Routing Element - Save**

**Figure 5-28: Routing List(s) (Search Results) Screen**
The Copy Routing List screen opens (Figure 5-29). This screen displays the information from the copied routing list.

![Copy Routing List Screen](image)

Figure 5-29: Copy Routing List Screen

2. Enter any changes (e.g. name, organization, and default status) for the new routing list.

See Table 5-9 for a description of the Copy Routing List screen.
Table 5-9: Copy Routing List Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routing List Name</td>
<td>Shows the name of the routing list for the details displayed.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Shows the name of the organization for the routing list and details displayed.</td>
</tr>
<tr>
<td>New Routing List Name</td>
<td>Field that automatically displays the name of the copied routing list. The new routing list may be renamed.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Field in which to enter the first four or more characters of the organization’s name to display a list to select from. User’s main organization displays by default.</td>
</tr>
<tr>
<td>Make this the default routing list?</td>
<td>Radio buttons used to indicate whether or not the DTA wants to make this the default routing list for the selected organization. Changing the default routing list will only affect newly created traveler profiles and those reassigned to the organization. It does not affect the default routing list of existing traveler profiles.</td>
</tr>
<tr>
<td>Copy Routing List</td>
<td>Button used to save the newly created routing list.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Button used to exit this screen without saving the new list.</td>
</tr>
</tbody>
</table>

3. Select **Copy Routing List**.

The Routing List(s) Search Results screen displays the new routing list (Figure 5-30).

![Figure 5-30: Routing List(s) Search Results Screen - New Routing List](image)

4. Select **Update** to make changes or confirm the routing elements are correct for the routing list.
See the following sections for instructions about how to complete the new routing list:

- 5.6.2.1 Add Routing Elements Inside the Organization
- 5.6.2.2 Add Routing Elements External to the Organization
- 5.6.2.3 Add Conditional Routing Elements
- 5.6.2.4 Remove Routing Elements

5. Select **Save Changes** once all routing elements have been updated (Figure 5-31).

![Update Routing List](image)

**Figure 5-31: Update Routing List Screen**

### 5.6.4 Delete Routing Lists

The Delete Routing List screen allows the DTA to delete a routing list. DTS will not allow a routing list to be deleted when the routing list is used; this means that if a traveler has the routing list selected in their profile, DTS will not allow the routing list to be deleted. If the DTA attempts to delete a routing list identified in any traveler profile, an error message will explain why the routing list cannot be deleted. DTAs cannot delete the default routing list for an organization. The DTA Maintenance Tool will delete the default routing list automatically when the organization is deleted. Deleted routing list information cannot be recovered.

Use the steps in Section 5.6.1 to search for the routing list to be deleted. Beginning on the Routing List(s) (Search Results) screen (Figure 5-32), follow the below steps to delete a routing list:
1. Select **Delete** to choose the routing list to be deleted.

   The Delete Routing List screen opens (Figure 5-33).

2. Verify the details for the selected routing list and confirm that it is the one to be deleted.

3. Select **Delete Routing List**.
The Routing Lists(s) (Search Results) screen opens. The deleted routing list is no longer listed (Figure 5-34).

![Routing List(s) (Search Results) Screen - Routing List Deleted](image)

If the DTA selects a default routing list, the error message shown in Figure 5-35 will display. The DTA must designate the default status to a different routing list before the default routing list can be deleted.

**Domain Error**

The following domain validation errors have occurred:

- The routing list cannot be deleted since it is currently designated as the default routing list for its associated organization. Please select a different routing list as the default for the organization if you wish to delete this routing list.

![Delete Routing List Screen With Error Message](image)

**5.6.5 Create a Routing List**

To create a routing list in DTS means to create and name an empty shell. The DTA adds routing elements afterward (see Sections 5.6.2.1, 5.6.2.2, and 5.6.2.3). To create a routing list, use the below steps:
1. Select **Routing Lists** from the DTA Tools drop-down list (Figure 5-36).

   ![Figure 5-36: DTA Maintenance Tool Home Page](image)

   The Search Routing List(s) screen opens (Figure 5-3).

2. Select the **Create Routing List(s)** link on the navigation bar.

   The Create Routing List screen opens (Figure 5-37).

   ![Figure 5-37: Create Routing List Screen](image)

3. Enter the name of the routing list in the **Routing List Name** field.

   Table 5-10 describes the fields and objects list on the **Create Routing List** screen.
Table 5-10: Create Routing List Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Routing List Name</td>
<td>Field in which to enter the name of the routing list to be created.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Field in which to enter the first four or more characters of the organization’s name to display a list to select from. User’s main organization displays by default.</td>
</tr>
<tr>
<td>Make this the default routing list?</td>
<td>Radio buttons used to indicate whether or not this will be the default routing list for the selected organization. Changing the default routing list will affect only newly created travelers and those reassigned to the organization. It will not change the default routing list of the organization’s existing travelers.</td>
</tr>
<tr>
<td>Save Routing List</td>
<td>Button used to save the newly created routing list.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Button used to exit this screen without saving the list.</td>
</tr>
</tbody>
</table>

4. Enter the organization name into the **Organization Name** text field where the new routing list will be added.

5. Select **Yes** or **No** to indicate whether or not the new routing list will be the default.

6. Select **Save Routing List**.

### 5.7 Global Routing Maintenance

Global Routing Maintenance allows the DTA to add and remove routing elements and replace signature authority to multiple routing lists at the same time. To update multiple routing lists at once, the DTA must first search for all routing lists to include in the update. Beginning on the Routing List(s) (Search Results) screen (Figure 5-38), the DTA may add or remove routing elements and replace signature authority to more than one list at a time.

![Figure 5-38: Routing List(s) (Search Results) Screen](image-url)
5.7.1 Add Routing Elements to Multiple Routing Lists

To add routing elements to more than one routing list, the DTA must begin on the Routing List (Search Results) screen (Figure 5-38).

1. Check the **Select to Globally Update** check box next to the routing lists that require the addition of a routing element (Figure 5-39).

2. Select **Add Routing Element**.

```
<table>
<thead>
<tr>
<th>Select to Globally Update</th>
<th>Individually Edit</th>
<th>Organization Name</th>
<th>Routing List Name</th>
<th>Default Routing List</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Update</td>
<td>DTMOCSD</td>
<td>CSD</td>
<td>Yes</td>
</tr>
<tr>
<td>✓</td>
<td>Update</td>
<td>DTMOCSD</td>
<td>CSDAB</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>DTMOCSD</td>
<td>EXERCISE</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>DTMOCSDOPS</td>
<td>OPSRL</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>DTMOCSDTRAINING</td>
<td>RL1</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>DTMOCSDTRAINING</td>
<td>TEAM1</td>
<td>No</td>
</tr>
</tbody>
</table>

Figure 5-39: Routing List(s) (Search Results) Screen - Globally Update Checked
```
The Globally Add Routing Element screen opens. All the routing lists named on the screen will be updated (Figure 5-40). Table 5-11 describes the fields and objects on the Globally Add Routing Element screen.

![Globally Add Routing Element Table]

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Routing List Name</th>
<th>Default Routing List</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTMOCSD</td>
<td>CSD</td>
<td>Yes</td>
</tr>
<tr>
<td>DTMOCSD</td>
<td>CSDAB</td>
<td>No</td>
</tr>
<tr>
<td>DTMOCSDTRAINING</td>
<td>TEAM1</td>
<td>No</td>
</tr>
</tbody>
</table>

*Read-only field, use Search button*

Figure 5-40: Globally Add Routing Element Screen
### Table 5-11: Globally Add Routing Element Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Type</td>
<td>Drop-down list to choose the type of document to which the selected routing list applies.</td>
</tr>
<tr>
<td>Document Status</td>
<td>Drop-down list to choose the stamp to be applied to the document (e.g., APPROVED).</td>
</tr>
<tr>
<td>Signature Name</td>
<td>Name of Routing Official or status in the system to whom the document must route before proceeding to the next step.</td>
</tr>
<tr>
<td>Search</td>
<td>Button used to search for the signature name.</td>
</tr>
<tr>
<td>Xorg Search</td>
<td>Button used to search for the signature name from another organization using the SSN.</td>
</tr>
<tr>
<td>Level</td>
<td>Level of the stamp in the routing list of a document.</td>
</tr>
<tr>
<td>Process Name</td>
<td>Field that indicates a special process that a document must go through. Used in conjunction with CTO SUBMIT, CTO BOOKED, and the conditional routing status.</td>
</tr>
<tr>
<td>Routing List(s) To Be Updated</td>
<td>Heading above the organization names and routing lists that will be affected by this global change.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Column heading above the name(s) of the organization(s) that will be updated.</td>
</tr>
<tr>
<td>Routing List Name</td>
<td>Column heading above the names of the routing lists that will be updated.</td>
</tr>
<tr>
<td>Default Routing List</td>
<td>Column heading above indicators that display whether or not the routing list being updated is the default routing list.</td>
</tr>
<tr>
<td>Globally Add Routing Element</td>
<td>Button used to save updates to the identified routing lists.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Button used to cancel without making any changes.</td>
</tr>
</tbody>
</table>
3. Complete the **Document Type**, **Document Status**, **Signature Name**, and **Level** fields (Figure 5-41).

![Globally Add Routing Element Screen](image)

**Globally Add Routing Element**

- **Document Type**: Authorization
- **Document Status**: REVIEWED GROUP AUTH
- **Signature Name**: Eric T West
- **Level**: 20
- **Process Name**: TRAVELER NUMBER

![Routing List(s) To Be Updated](image)

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Routing List Name</th>
<th>Default Routing List</th>
<th>Update Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTMOCSD</td>
<td>CSD</td>
<td>Yes</td>
<td>Successfully</td>
</tr>
<tr>
<td>DTMOCSD</td>
<td>CSDAB</td>
<td>No</td>
<td>Successfully</td>
</tr>
<tr>
<td>DTMOCSDTRAINING</td>
<td>TEAM1</td>
<td>No</td>
<td>Successfully</td>
</tr>
</tbody>
</table>

![Globally Add Routing Element Summary](image)

**Globally Add Routing Element Summary**

4. Complete the **Process Name** field if conditional routing is necessary.

5. Select **Globally Add Routing Element**.

The Globally Add Routing Element Summary screen indicates whether or not the update was successful for each of the routing lists selected for this process (Figure 5-42).

![Globally Add Routing Element Summary Screen](image)

**Note**: The Globally Add Routing Element feature will not replace existing elements; it only adds new elements.

6. Select **OK** after viewing the update results.

The three routing lists shown in Figure 5-42 have been updated with Eric West as the Routing Official who will review group authorizations.
5.7.2 Remove Routing Elements From Multiple Routing Lists

To remove routing elements from multiple routing lists, the DTA must begin on the Routing List(s) (Search Results) screen.

1. Check the **Select to Globally Update** boxes for all routing lists that requires the removal of a routing element (Figure 5-43).

![Figure 5-43: Routing List(s) (Search Results) Screen](image)

2. Select **Remove Routing Element**.

The Globally Remove Routing Element screen opens.

3. Complete the field(s) (**Document Type**, **Document Status**, **Signature Name**, and **Level**) to be removed from the routing lists (Figure 5-44).

![Figure 5-44: Globally Remove Routing Element Screen](image)
4. Select **Globally Remove Routing Element**.

The Globally Remove Routing Element Summary screen indicates whether or not the update was successful for each of the routing lists selected for this process.

5. Select **OK** after viewing the results.

### 5.7.3 Replace Signature Authority on Multiple Routing Lists

To replace the signature name on more than one routing list at a time, the DTA must begin on the Routing List (Search Results) screen.

1. Check the **Select to Globally Update** box for the routing lists on which the DTA will replace signature authority (Figure 5-45).

![Routing List(s) (Search Results) Screen - Globally Update Checked](image)

2. Select **Replace Signature Authority**.
The Globally Replace Signature Authority screen opens (Figure 5-46). See Table 5-12 for descriptions of the fields and objects on the Globally Replace Signature Authority screen.

### Globally Replace Signature Authority

<table>
<thead>
<tr>
<th>Old Signature Name</th>
<th>New Signature Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="search_icon" alt="Search" /></td>
<td><img src="xorg_search_icon" alt="Xorg Search" /></td>
</tr>
<tr>
<td><img src="search_icon" alt="Search" /></td>
<td><img src="xorg_search_icon" alt="Xorg Search" /></td>
</tr>
</tbody>
</table>

† Read-only field, use Search button

<table>
<thead>
<tr>
<th>Routing List(s) To Be Updated</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Routing List Name</th>
<th>Default Routing List</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTMOCSD</td>
<td>CSD</td>
<td>Yes</td>
</tr>
<tr>
<td>DTMOCSD</td>
<td>CSDAB</td>
<td>No</td>
</tr>
<tr>
<td>DTMOCSDTRAINING</td>
<td>TEAM1</td>
<td>No</td>
</tr>
</tbody>
</table>

![Globally Replace Signature Authority Screen](globally_replace_signatureAuthority_screen)

Figure 5-46: Globally Replace Signature Authority Screen
Table 5-12: Globally Replace Signature Authority Screen Description

<table>
<thead>
<tr>
<th>FIELD OR OBJECT</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Old Signature Name</td>
<td>Field in which to enter the existing signature name on the routing list by using one of the search functions.</td>
</tr>
<tr>
<td>New Signature Name</td>
<td>Field in which to enter the new signature name by using one of the search functions.</td>
</tr>
<tr>
<td>Search</td>
<td>Button used to search for a signature name from the same organization using the SSN or last name.</td>
</tr>
<tr>
<td>Xorg Search</td>
<td>Button used to search for a signature name from another organization using the SSN.</td>
</tr>
<tr>
<td>Routing List(s) To Be Updated</td>
<td>Heading above the organization name(s) and routing lists that will be affected by this global change.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Column heading above the name(s) of the organization(s) that will be updated.</td>
</tr>
<tr>
<td>Routing List Name</td>
<td>Column heading above the names of the routing lists that will be updated.</td>
</tr>
<tr>
<td>Default Routing List</td>
<td>Column heading above indicators that display whether or not the routing list being updated is the default routing list.</td>
</tr>
<tr>
<td>Globally Replace Signature Authority</td>
<td>Button used to save updates to the routing lists</td>
</tr>
<tr>
<td>Cancel</td>
<td>Button used to cancel without making any changes</td>
</tr>
</tbody>
</table>

Complete the Signature Name fields.

3. Select Search to search within an organization.
   -OR-
   Select Xorg Search to search external organizations.

The Search People screen opens (Figure 5-47). If the DTA selected Xorg search, the Search People screen shown in Figure 5-48 opens. This requires the DTA to enter the SSN of the signature name.
4. Enter the SSN or last name of the signature name.

5. Select Search.

The Search People Results screen opens (Figure 5-49).

6. Choose Select to select the signature name.
The signature names display on the Globally Replace Signature Authority screen (Figure 5-50).

![Globally Replace Signature Authority Screen](image1)

7. Select **Globally Replace Signature Authority** to replace the signatures in multiple routing lists.

8. The Globally Replace Signature Authority Summary screen indicates whether or not the update was successful for each of the routing lists selected for this process (Figure 5-51).

![Globally Replace Signature Authority Summary Screen](image2)

9. Select **OK**.

### 5.8 Create a Routing List for a Self-AO

Travelers can be designated as Self-AOs in cases where they need to approve their own authorization. Self-AOs can approve their own authorizations unless it contains a non-ATM advance or a scheduled partial payment (SPP) request. Self-AOs cannot approve their own vouchers. In these cases, an authorized individual in the Self-AO's routing list must approve the document. To enable this type of approval, a backup AO should be named in the routing list.

#### 5.8.1 Designate a Traveler as a Self-AO

To be designated a Self-AO, the traveler must complete the standard process to approve authorizations in DTS. Additional information can be found in the *DTS Financial Field Procedures Guide*.
Chapter 5: Routing Lists

Self-AOs' profiles must reflect that the traveler is a Self-AO. Beginning on any screen in the DTA Maintenance Tool, the DTA may use the following steps to complete the process:

1. Select the **DTA Tools** drop-down list and choose **People**.
2. Search for the traveler’s name.
3. Select **Update** for the correct traveler in the list.
4. Select **Continue**.
5. Select the **Yes** radio button (under General Traveler Data) to grant Self-AO Approval.
6. Check the 0, 1, and 2 check boxes for Editable Permission Level(s).
   - Level 1 is optional for view-only access to the budget. Level 2 is for access to Route and Review.
7. Select **Save Changes**.

**5.8.2 Identify a Traveler as an AO in the Routing List**

A DTA must identify Self-AOs as AOs in their own routing lists. Beginning on any screen in the DTA Maintenance Tool, follow the below steps to complete the process:

1. Select the **DTA Tools** drop-down list and select **Routing Lists**.
   - The Search Routing List(s) screen opens (Figure 5-3).
2. Search for the routing list to be updated.
3. Select **Update**.
   - The Update Routing List screen opens.
4. Select **Add Routing Element**.
   - The Add Routing Element screen opens.
5. Select the **Document Type** drop-down list and choose **Authorization**.
6. Select the **Document Status** drop-down list and choose **APPROVED**.
7. Select **Search** to complete the Signature Name field.
   - The Search People screen opens.
8. Enter the Self-AO’s organization in the **Organization Name** field.
9. Enter the traveler’s name or SSN.
10. Select **Search**.
    - The Search People Results screen opens.
11. Choose **Select** next to the name of the traveler.

12. Enter the **Level** for the AO (use the same level as the backup AO).

13. Leave the Process Name field blank.

14. Select **Add Routing Element** to accept the entered element.

15. Select **Save Changes** (Figure 5-52). See Section 5.6.2 for more details.

![Figure 5-52: Update Routing List Screen](image)

16. Verify that the Self-AO’s default routing list has been assigned as the routing list updated in this process.

DTAs may confirm Self-AO’s default routing list by viewing the Routing List Name field in the traveler’s profile in the DTA Maintenance Tool. See Section 7.3.2, Update Personal Profiles.

5.9 Assign Routing Lists to People

DTAs will use the People feature of the DTA Maintenance Tool to assign routing lists to travelers. As discussed earlier, each traveler is assigned a default routing list in their profile. There may be more than one routing list from which to select, depending on the number of routing lists created for the organization. A traveler may change the default routing list before signing a travel document to allow that document to be routed to a different series of Routing Officials.

To assign a routing list, see Section 7.3.2, Update Personal Profiles.

5.10 View a List of Routing Lists

The DTA can generate a report that identifies all the routing lists and their elements for the organization identified.

Follow the below steps to view a list of routing lists:
Chapter 5: Routing Lists

1. Select the **DTA Tools** drop-down list and choose **Routing Lists**.

   The Search Routing Lists screen opens (Figure 5-3).

2. Select **View Routing List List**.

   The View Routing List List screen opens (Figure 5-53).

   ![Figure 5-53: View Routing List List Screen](image)

3. Enter the first four or more characters of the organization’s name to display a list to select from.

4. Check **Include Sub-Organizations** to include sub-organizations in the report.

5. Select **Run Report**.

   The DTA is prompted to download the compiled report, which may be downloaded to their computer or viewed in a separate window as an Excel spreadsheet.
6. Select **Open** to display the report on the screen (Figure 5-54).
- OR-
  Select **Save** to download the file to the hard drive.
- OR-
  Select **Cancel** to cancel the action and return to the previous screen.

![Figure 5-54: List of Routing List](image)

### 5.11 View Delegated Authorities List

The Delegated Authorities List displays the delegation of signature authority for the routing lists of an organization.

Follow the below steps to view the Delegated Authorities List:

1. Select the **DTA Tools** drop-down list and choose **Routing Lists**.

The Search Routing Lists screen opens (Figure 5-3).

2. Select **View Delegated Authorities List**.
Chapter 5: Routing Lists

The View Delegated Authorities List screen opens (Figure 5-55).

![View Delegated Authorities List Screen](image)

3. Enter the first four or more characters of the organization’s name to display a list to select from.

4. Check the Include Sub-O rganizations check box to include sub-organizations in the report.

5. Select Run Report.

The DTA is prompted to download the compiled report, which may be downloaded to their computer or viewed in a separate window as an Excel spreadsheet.

6. Select Open to display the report on the screen (Figure 5-56).
   -OR-  
   Select Save to download the file to the hard drive.  
   -OR-  
   Select Cancel to cancel the action and return to the previous screen.

![Delegated Authorities List](image)
This page is left blank intentionally.