

People



- Select Administrative>DTA Maintenance Tool>People>Create Person
- Complete the **SSN** field
- Select **Yes** if the person will travel or **No** if travel is not anticipated
- Complete all mandatory fields (*identified by a red asterisk*)
- Select **Save Person**

Note: The DTA will only need to create the profiles of people who do not self-register.

Lines of Accounting (LOAs)



- Select Administrative>DTA Maintenance Tool>Lines of Accounting>Create LOA(s)
- Select **Format Map** from the drop-down list
- Select **Continue**
- Select **Organization Name** from the drop-down list
- Complete the **Empty Budget Shell Fiscal Year** field (four digit FY)
- Complete the **LOA Fiscal Year** field (two digit FY)
- Complete the **LOA** name field
- Enter the appropriate information in Account 1
- Enter any necessary remaining fields in appropriate accounts
- Select **Save Line of Accounting**

Budgets



- Select Administrative>Budget>Budget Maintenance>Show Budgets
- Select **Fiscal Year** from the drop-down list

- Complete the **Organization** name field or select the **magnifying glass** icon to search for and select an organization
- Check the **Include Suborganizations** box to include the budgets of lower-level organization in the search results, if necessary
- (Optional) Complete the **Budget Label** field
- Select **Show Budgets for Selected Organization(s)**
- Select **Edit** next to the desired budget
- Select the **Yes** or **No Shared** radio button to indicate whether the budget is to be shared
- Update the **Funding Target Adjustments** field(s)
- Enter comments in the **Remarks** field.
- Select **Save**

Reports



- Beginning on the DTS Welcome screen, mouse over **Reports** on the menu bar
- Select **Report Scheduler**
- Select **Request New Report**
- Select the desired report from the list
- Enter the report criteria into the search fields
- Select **Submit**
- The DTA receives an email notification when the report is ready for download. Return to the list of requested reports on the **Reports** screen to view pending and completed reports

This document is controlled and maintained on the www.defensetravel.dod.mil Web site. Printed copies may be obsolete. Please check revision currency prior to use.



Defense Travel Administrator: General Setup

Version 5.0, April 5, 2010
(See DTA Manual, Chapters 3 through 10)

This is a guide for the Lead DTA to follow when using DTS to create an organizational structure.

Organizations

- Lay out complete organizational hierarchy
- Determine organization naming sequence
- Create main and sub organizations

Routing Lists

- Determine routing structure for each organization; include Conditional Routing
- Create routing lists for each organization

Routing List Details

- Enter routing elements for each routing list

Groups

- Plan group structure
- Create groups for appropriate organizations

Individual Group Membership

- Assign individuals to groups as appropriate

People

- Review and accept OR create personal profiles
- Establish roles for each person
- Assign an organization, permission levels, and default routing list

Lines of Accounting (LOAs)

- Add LOAs by creating or copying
- At the end of fiscal year (FY), roll over LOA

Budget

- Enter quarterly or annual budget targets

Reports

- Use the report scheduler to generate reports

General Setup



Organizations



- Select Administrative>DTA Maintenance Tool>Organizations>Create Organization(s)
- Complete the **Organization Name** field
- Select the correct **DTA ID** from the drop-down list. If the DTA's contact information does not show in the list, contact the Travel Assistance Center (TAC)
- Enter **Default Routing List**
- Select **Site Name** from the drop-down list
- Complete all mandatory field (*those identified by a red asterisk*)
- Select the correct **Global Distribution System (GDS)** from the drop-down list (if using a Commercial Travel Office, the screen will refresh and additional GDS information will display)

If CTO is enabled:

- Select **PCC** from the drop-down list
- Select **Ticket PCC** from the drop-down list
- Complete the **Company Code** field
- Select **Save Organization**

Routing Lists



- Select Administrative>DTA Maintenance Tool>Routing Lists>Create Routing List(s)
- Complete the **Routing List Name** field
- Select **Organization Name** from the drop-down list

- Select **Yes** or **No** to making the routing list the default list for the organization (**Note:** Changing the default routing list will only affect new travelers who have been received into the organization)
- Select **Save Routing List**

Routing List Details



- Select Administrative>DTA Maintenance Tool>Routing Lists>Search Routing List(s)
- Leave the **Routing List Name** field blank
- Select **Organization Name** from drop-down list
- Check the **Include Suborganizations** box (If this box is checked, then results will be returned from the organization and all of its suborganizations)
- Select **Update** next to desired routing list (Existing routing elements will be listed)
- Select **Populate CTO Stamps** to add CTO at levels 2 and 3 in the routing process
- Select **Add Routing Element**
- Select **Document Type** from the drop-down list
- Select **Document Status** from the drop-down list to identify stamp applied by the routing official
- Select **Search** next to the **Signature Name** field
- Enter the new routing official's name or SSN
- Select **Search**
- Choose **Select** next to the name of the person to be added as the routing official
- Complete the **Level** field. The level value range is 1-30
- Select **Process Name** from the drop-down list, if required
- Select **Add Routing Element**
- Select **Save Changes** (Document Status **APPROVED** must be assigned before the routing elements can be saved)

Groups



- Select Administrative>DTA Maintenance Tool>Groups>Create Group(s)
- Complete the **Group Name** field
- Select **Organization Owner Name** from the drop-down list
- Select **Save Group**

For information about Global Group Membership, see the *DTA Manual, Section 6.3.5*

Individual Group Membership



- Select Administrative>DTA Maintenance Tool>Groups>Individual Group Members>Add
- Select **Organization Owner Name** from the drop-down list
- Select **Group Name** from the drop-down list
- Complete the **Member SSN** field or select **Search** to the right of the **Member SSN** field to locate the correct person
- Choose **Select** next to the name
- Select **Add Member**