

CHAPTER 5: ROUTING LISTS

In the Defense Travel System (DTS), authorizations, group authorizations, vouchers from authorizations (referred to as *vouchers*), and local vouchers move electronically along a chain of Routing Officials (ROs), each with a task to perform in order to complete the approval and reimbursement process for a traveler. This chain of officials is referred to as a *routing list*. This chapter covers the below topics:

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5.1 Routing Lists

A routing list in DTS is a route or path along which travel documents move in order to be acted upon by the officials who are involved in the different aspects of Department of Defense (DoD) travel. Organizational Defense Travel Administrators (ODTAs) with permission levels 1 and 5 set up routing lists to follow the same path as the structure of the organization. The DTA creates routing lists for suborganizations and names them accordingly. This allows the DTA to assign a suborganization and a default routing list name to all traveler profiles in one step. There is a relationship between the RO who reviews and approves authorizations, and the organization where the traveler receives administrative support.

Each suborganization 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 *stamp* that the RO applies to a document to indicate that the task is complete. The name of the last stamp applied is considered to be the current status of the document, such as CERTIFIED, REVIEWED, or APPROVED. The application of this stamp moves the document forward to the next RO on the routing list.
- **Signature name.** The name of the RO who applies the stamp. Only the name appears on the routing list. DTS identifies this person by name and Social Security Number (SSN), and authenticates identity through a digitally encrypted signature.
- **Level.** The level number indicates the stop along the document's route to its final step. The level is matched with the document status stamp, and thus is associated with the RO who applies that stamp. For example, level 10 in the routing list may indicate the Certifying Officer (CO) who certifies the availability of funds and stamps an authorization CERTIFIED.

As stated above, each level in a routing list is a stop on the document's electronic routing process. The level 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 having to change the numbers already assigned. For instance, if a routing list has a REVIEWED stamp at level 5, and an APPROVED stamp at level 10, then there is space to add a CERTIFIED stamp at Level 8 later on. Only the levels assigned to the CTO SUBMIT and CTO BOOKED stamps need 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, then CTO BOOKED must follow as level 3. However, 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 available level cannot exceed 30.

5.1.1 Default Routing Lists

Each organization must identify at least one routing list as the default during organization setup. The default routing list should serve each type of document that travelers in the organization will use; authorization, voucher, and local voucher. The DTA may replace the default routing list with another routing list that is available. Travelers may replace the default routing lists in their profiles and the default routing lists for any documents that need to be routed to a different list.

5.1.2 Multiple Routing Lists

By using more than one routing list, DTAs may tailor electronic routing to the organization's workflow process for travel documents. Most organizations use a primary routing list for routine travel, and others for special situations. Routing lists may be created in each suborganization for standard functions such as approval of orders for medical travel and funeral detail travel. Other situations may need separate routing lists (e.g., arrangements-only travel, invitational travel and other trip types).

One variation of multiple routing occurs when an organization uses two different sources of funds that require different approvals. The organization may specify one line of accounting (LOA) for the traveler or clerk to use to initiate all documents. Later in the routing process, a reviewer may divert a document to a different routing list, based on the details of the trip. This prevents the certifying chains and approving chains from seeing each other's documents. The reviewer adjusts the document by removing the routing list assigned to the document, replacing it with the new routing list, and signing the document. This initiates the new routing list after routing has been initiated.

5.1.3 Conditional Routing

DTAs can tailor electronic 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, then the additional step specified in the routing will be circumvented. The process of identifying such conditions is called a *routing test*.

See Appendix K, Table K-10: Conditional Routing, Preaudits, and Electronic Processing Audits for a complete list of the routing tests. The routing tests that are available to DTS users are listed below. See Section 5.6.2.3 for information on the below tests in the Process Names field:

- 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).

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.

DTAs may modify routing lists at any time. 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. See Section 5.7. to find out how DTAs add or remove routing elements, or replace signature authority to more than one routing list at once.

5.2 Routing Officials

Routing Officials (ROs) must have permission levels 0 and 2. These permission levels permit ROs to prepare documents and use the Route & Review functions. They also give the RO access to their assigned stamp in the routing list and other stamps, such as SIGNED, RETURNED, and CANCELLED. ROs and permission levels are described in Chapter 3 of this manual.

The RO need not be a member of the traveler's organization. In order to add an RO to a routing list who is outside the DTA's organization, the DTA must have access to the RO'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. Local policy determines which level in the routing list is assigned this responsibility, and which stamp the CO will use. Each CO is appointed using DD Form 577, in accordance with the Department of Defense (DoD) Financial Management Regulations (FMR).

The AO is considered to be responsible for approving the requirement or need for travel.

In many situations the CO and the AO are the same person, and should use the APPROVED stamp. In all cases, the APPROVED stamp is the final stamp applied to a document by the highest-level RO.

5.2.2 Alternate ROs

The travel document process workflow should have more than one official available at each step. Having alternate ROs in place is helpful in situations where the responsibility is shared or where the primary RO is often unavailable. Multiple ROs may be assigned to the same stamp and step in a routing list. Remember, that the more ROs on a routing list, the greater the maintenance requirements.

5.2.3 Delegate Officials

ROs at any level can delegate their signature authority to another RO to route documents during their absence. The delegated official will receive the e-mail notification that a document needs action. When the delegated official stamps the document, DTS removes the document from all other queues for that level. When selecting a delegate, the RO can choose from the list of organization members with permission level 2. DTS warns the delegating RO if the selectee does not have the correct permission levels. Without the correct permission levels, the delegated official will not be able to accomplish the necessary tasks; or if delegated to use the APPROVED stamp, the selectee may not have been appointed in writing as an AO. The RO should only delegate authority to those who have the same permission levels. This authority remains delegated until the original RO removes it.

5.3 Stamps, Status Codes, and Action Codes

DTS uses the terms *stamp* and *status code* interchangeably. The stamp the user selects 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 RO(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.

5.3.1 DTS-Supplied Stamps (Status Codes)

This section defines DTS-supplied stamps (status codes) used in routing lists and identifies the users who apply them. These stamps may also be used as selection criteria for various document processing actions and generating reports. See Appendix K, Table K-6: Stamps (Status Codes) for a complete list of status codes and descriptions.

SIGNED *Traveler*. Makes the document a permanent part of DTS for 15 months, and initiates routing of the document using the routing list assigned in the document. For vouchers and local vouchers, this stamp causes key data elements in the claim to be encrypted for future verification of the official financial transaction. SIGNED initiates the action code for electronic routing of the document.

T-ENTERED *Non-DTS Entry Agent (NDEA)*. This stamp accomplishes the same actions as SIGNED, except it is used by NDEAs when signing vouchers and local vouchers for travelers. It cannot be used when signing authorizations or group authorizations. For vouchers and local vouchers, this stamp causes key data elements in the voucher to be encrypted for future verification of the official financial transaction.

AUTHORIZED *Various ROs, such as supervisors and clerks*. Indicates that a document has been opened and examined for accuracy and completeness. This stamp causes no actions to occur in DTS other than allowing routing to continue.

REVIEWED *Various ROs, such as supervisors and clerks*. Indicates that a document has been opened and examined for accuracy and completeness. This stamp causes no actions to occur in DTS other than allowing routing to continue.

CERTIFIED *Budget DTAs or COs*. This stamp indicates that a document has been opened and an action outside DTS has occurred (e.g., LOA selection, certification of funds availability in a separate system). If applied to a document, DTS will check funds availability in the budget associated with the LOA selected for the document.

APPROVED AO. Used for all document types to indicate the document has been approved for final processing. Initiates several action codes, including the following:

- Assigns the travel authorization number to authorizations
- Uses the LOA to decrement the appropriate travel budget in the DTS Budget module
- Sends a ticket approval notice to the Commercial Travel Office (CTO) for authorizations
- Initiates the signature verify process
- Sends the consequent financial transactions to the DoD Accounting and Disbursing System (DADS)
- Causes key data elements in the document to be encrypted for future verification of the official financial transaction
- Makes the document read-only so it cannot be modified, except by the creation of a separate document, an amendment
- Reconciles the DTS budget with the actual cost of the trip (for vouchers).

RETURNED Various ROs. Returns a document to the traveler. This is used when the document lacks information. The document can be resubmitted once the necessary changes are made. When a document is stamped RETURNED, DTS send an e-mail to inform the traveler that a document has been returned. The traveler must re-sign the document after corrections are made to start the routing process again.

CANCELLED Various ROs. This stamp completes the Trip Cancellation process when no expenses were incurred. DTS converts the document to a read-only format so that the data cannot be modified. DTS sends an e-mail to the traveler indicating the authorization is cancelled.

The CANCELLED stamp cannot be applied by the traveler; it must be initiated by an RO in the routing list.

If the stamp is applied and the Trip Cancellation process was not used, it terminates the routing of a document in process or reverses the previous approval of an authorization. DTS removes the routing list from the cancelled document and removes the document from the RO's review list.

When CANCELLED is applied to APPROVED documents, the appropriate budget item in DTS is credited and the deobligation is initiated in the accounting system.

A voucher or local voucher cannot be cancelled. It is an official claim after it is stamped SIGNED or T-ENTERED.

A document that has been stamped CANCELLED can only be viewed and cannot be rerouted.

5.3.2 System-Generated Status Codes

The following system-generated status codes or stamps identify specific events in the electronic processing of documents. See Appendix K, Table K-6: Stamps (Status Codes) for a complete list of status codes and descriptions.

CREATED. Identifies a document that is in the process of being completed or has been saved but is not SIGNED. This causes no actions to occur in DTS and does not involve electronic processing of the document.

CTO SUBMIT and **CTO BOOKED.** These two status codes are mandatory for all routing of authorizations and group authorizations that contain reservations. These documents require CTO action to provide "should-cost" data, perform quality checks, confirm reservations not auto-booked by DTS, and

make reservations when assistance is requested. The routing list levels for these two stamps must be numbered consecutively.

POSACK RECEIVED. Serves as an acknowledgement from the accounting system that an obligation, combined obligation, or an accounts receivable transaction has been posted in the accounting system.

AUTH 24 HOUR PASS. Used for Permissive TDY authorizations in place of the POSACK RECEIVED stamp. Indicates that 24 hours have passed since the obligation (initial or adjusted) has been submitted to the accounting system. This stamp must be on an authorization prior to a voucher being completed. It causes no actions to occur in DTS other than to allow an authorization to appear in the Voucher From Authorization list.

APPROVAL FAILED. Shows that the document has failed an Electronic Processing (EP) or Payment module audit. This stamp causes DTS to send an e-mail informing the traveler that an authorization, voucher, or local voucher has failed audit(s) when being processed by EP into the Payment module.

APPROVED. Shows that the document has passed an EP or Payment module audit.

PAY LINK. Shows that the EP module has copied a document from the DTS database to the Payment module database.

PAYMENT SUBMIT. Applied when the Payment module created a user-defined file and placed it in a directory to be swept by the accounting system. This stamp causes no actions to occur in DTS other than awaiting the PAID stamp to be applied upon payment.

PAID. Applied when an 820 payment remittance notice generated in the accounting system is received. This stamp causes DTS to send an e-mail to the traveler indicating a payment transaction has been produced, and to continue the routing process for the document to be archive submitted.

REJECT. Applied when an 824 reject notice generated in the accounting system is received. This stamp indicates an obligation or a payment has not been made. This stamp causes DTS to send an e-mail to the DTA indicating a transaction has been rejected. The DTA is responsible for researching the document and correcting the reject problems.

ARCHIVE SUBMITTED. Applied when the trip record is sent to the archive. Trip records consist of the complete authorization (with all amendments) and complete voucher, when appropriate. An authorization in a CANCELLED status or an original voucher in a PAID status triggers ARCHIVE SUBMITTED. PAID supplemental vouchers are also archived, but individual scheduled partial payments (SPPs) are not. This stamp causes no other actions to occur in DTS other than awaiting ARCHIVE ACCEPTED. DTS retrieves trip records from the archive every four hours.

ARCHIVE ACCEPTED. The archive accepted the document. It causes no action in DTS.

ARCHIVE REJECTED. Identifies the portion of an authorization or voucher that was rejected by the archive. DTS Operations runs scripts to identify documents that have been rejected. The system administrator will take action to clear the reject.

ARCHIVE READY. This is a companion stamp for ARCHIVE REJECTED. It identifies the portion of a trip record that the archive has accepted. For instance, if the voucher was stamped ARCHIVE REJECTED, the system would stamp the authorization portion of the trip record ARCHIVE READY.

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 reservations module in DTS to make travel arrangements.
- *CTO BOOKED (Level 3 or 4)*. The CTO has reviewed or made travel arrangements for the traveler and has put a hold on the arrangements until the authorization or group authorization has been approved.
- *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 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 a typical routing list associated with that organization are shown in Figure 5-1 and Figure 5-2. There are specific names for each routing list for each suborganization. For example, DAFC20AB21 (1st Battalion) uses multiple routing lists; one each for ROUTINE, COMMAND, and MEDICAL, assuming that there are separate responsible officials for the different types of travel. The routing list ROUTINE, shown in Figure 5-2, 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.

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.

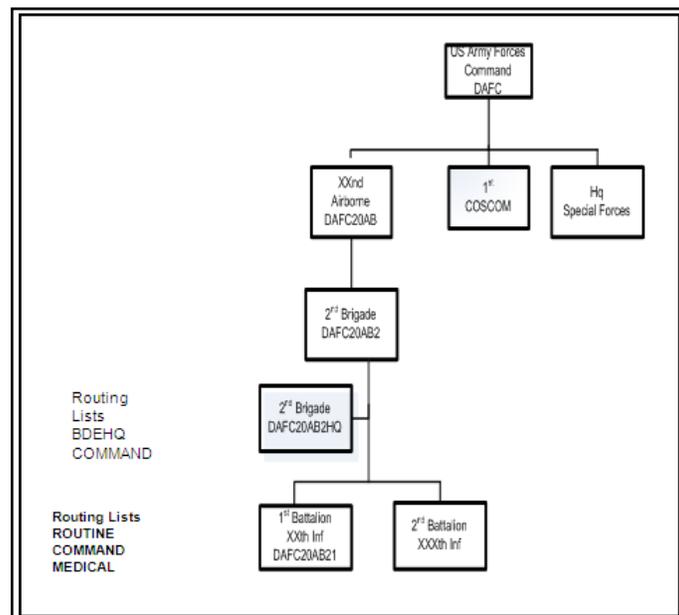


Figure 5-1: Sample Organization Chart

Organization: DAFC20AB21 (1st Battalion)

Routing List Name: ROUTINE

Table 5-1: Sample Routing List

SAMPLE ROUTING LIST				
DOC TYPE	DOC STATUS	SIGNATURE NAME	LEVEL	PROCESS NAME
AUTH	CTO SUBMIT	**CTO SUBMIT	3	BYPASS PNR*
AUTH	CTO BOOKED	**CTO BOOKED	4	BYPASS PNR*
AUTH	REVIEWED	Harry Smith	10	
AUTH	REVIEWED	Sidney Stewart	10	
AUTH	APPROVED	Jim Coyle	20	
AUTH	APPROVED	Mary Jackson	20	
LCVH	REVIEWED	Harry Smith	10	
LCVH	REVIEWED	Sidney Stewart	10	
LCVH	APPROVED	Jim Coyle	20	
LCVH	APPROVED	Mary Jackson	20	
VCH	REVIEWED	Harry Smith	10	
VCH	REVIEWED	Sidney Stewart	10	
VCH	APPROVED	Jim Coyle	20	
VCH	APPROVED	Mary Jackson	20	

5.6 DTA Maintenance Tool and Routing Lists

DTAs are responsible for maintaining their site's routing lists in DTS, using the DTA Maintenance Tool. This section will assist the DTA in using the Maintenance Tool 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. It is the starting point of the tool and displays the modules the DTA can access, based on assigned permission levels. The drop-down list on the navigation bar is called DTA Tools. It appears on every screen in the DTA Maintenance Tool, allowing the DTA to move from task to task.

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 only create, update, copy, and delete routing lists for the organizations to which they have access.

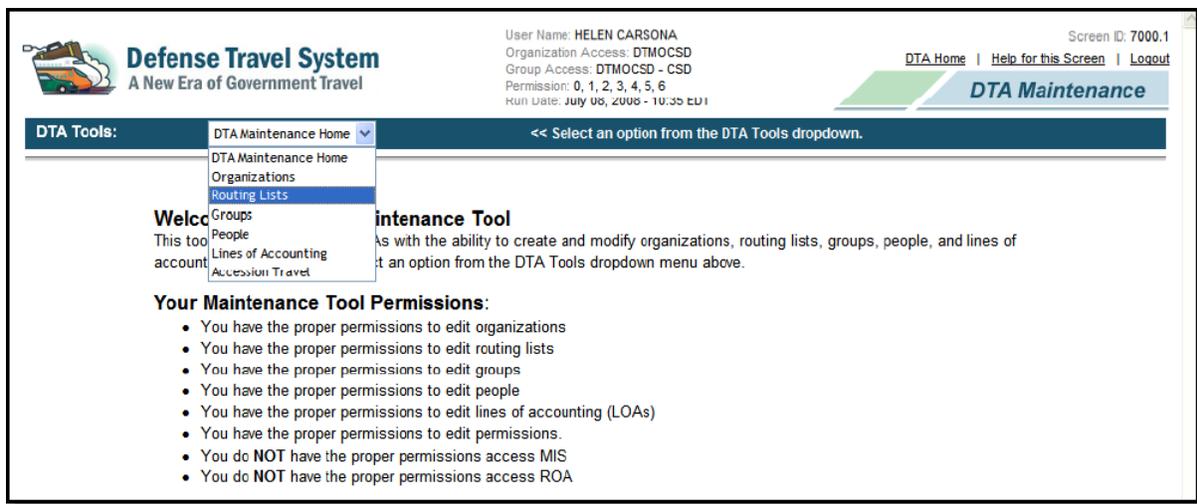


Figure 5-2: DTA Maintenance Tool Home Page

5.6.1 Search for Routing Lists

In order 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 drop-down list. 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 5-1 for a list of the Search Routing List(s) screen field names and their descriptions.

The screenshot shows the 'Search Routing List(s)' screen. At the top left is the 'Defense Travel System' logo with the tagline 'A New Era of Government Travel'. To the right, user information is displayed: 'User Name: HELEN CARSONA', 'Organization Access: DTMOCS', 'Group Access: DTMOCS - CSD', 'Permission: 0, 1, 2, 3, 4, 5, 6', and 'Run Date: July 08, 2008 - 10:49 EDT'. Further right are links for 'DTA Home', 'Help for this Screen', and 'Logout', along with a 'DTA Maintenance' button. Below the header is a 'DTA Tools' menu with 'Routing Lists' selected, and links for 'Search Routing List(s)', 'Create Routing List(s)', 'View Routing List List', and 'View Delegated Authorities List'. The main form area is titled 'Search Routing List(s)' and contains three input fields: 'Routing List Name' (a text box), 'Organization Name' (a dropdown menu currently showing 'DTMOCS'), and 'Default Routing Lists Only' (a checkbox). To the right of the Organization Name dropdown is a checked checkbox labeled '--Include Sub-Organizations' and a magnifying glass icon. A 'Search' button is positioned at the bottom center of the form.

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

Use the below 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. Select the organization from the **Organization Name** drop-down list to view the routing lists.
3. Check the **Include Sub-Organizations** check box to view all of the routing lists that are in the hierarchical setup below the organization entered in Step 2.

Note: In a long list of organization names, the magnifying glass icon can be used to quickly find an organization. After selecting the icon, enter the organization name or the first few characters, e.g., DTMO, in the text box. Select **OK**. The organization appears in the Organization Name field. Use the drop-down to continue the search if necessary (Figure 5-4).

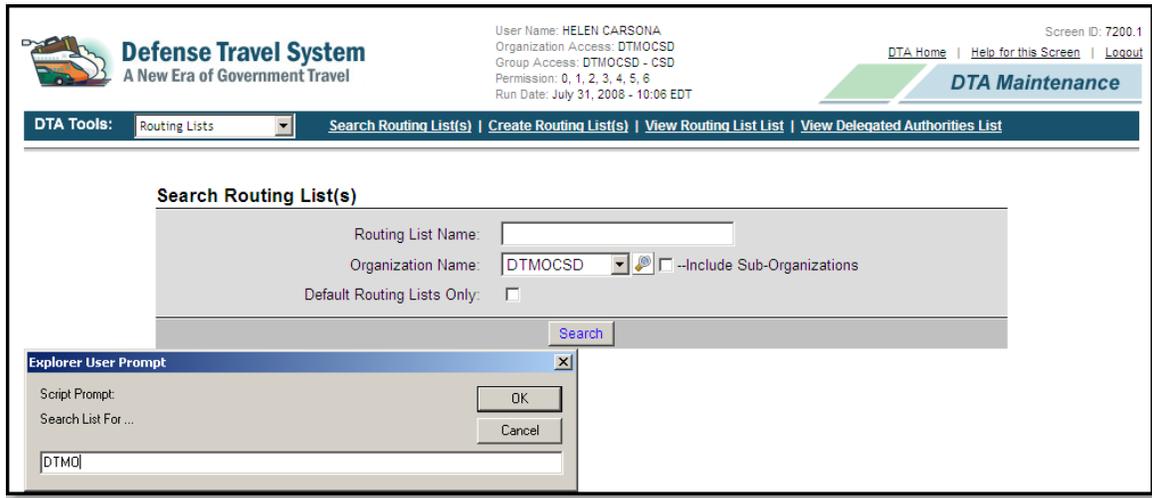


Figure 5-4: Search Organization Name Prompt

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

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

SEARCH ROUTING LIST(S) SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Routing List Name	Label that identifies the routing list to use for a particular document.
Organization Name	Organization where the selected routing list is associated.
Include Sub-Organizations	Check box that, when checked, causes DTS to include suborganizations in the search.
Default Routing Lists Only	Checkboxes that, when checked, causes DTS to display default routing lists only.
Search	Button used to initiate the search and display the search results.

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

Defense Travel System
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User Name: HELEN CARSONA
Organization Access: DTMOCSO
Group Access: DTMOCSO - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 10:56 EDT

Screen ID: 7201.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)

DTA Maintenance

DTA Tools: Routing Lists

[Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCSO**
Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	NOCTO	No
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	OPERATIONS	No
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	TRAINING	No
<input type="checkbox"/>	Update Copy Delete	DTMOCSO205	205RL	Yes

[Select All](#) [Clear All](#)

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

1 - 5 of 5

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

The Default Routing List column identifies whether or not the list is designated as a default. See Table 5-3 for a list of the Routing List(s) Search Results screen field, column, and object names and their descriptions.

Table 5-3: Routing List(s) (Search Results) Screen Description

ROUTING LIST(S) (SEARCH RESULTS) SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Organization Name	Name of the organization where the search was conducted.
Default Routing Lists Only	Identifier that displays <i>Yes</i> if the search results include default routing list names only. Displays <i>No</i> if the search results include all routing list names.
Include Sub-Organizations	Identifier that displays <i>Yes</i> if the search results include suborganization names. Displays <i>No</i> if the search results do not include suborganization names.
Select to Globally Update	Check box(es) used to add routing elements, remove routing elements, or replace signature authority to multiple routing lists at the same time.
Individually Edit	Column heading above buttons that provide the means to update, copy, or delete a routing list.
Update	Button used to change routing list information.
Copy	Button used to initiate the creation of a copy of a routing list in one organization and save it to another.
Delete	Button used to delete a routing list.
Organization Name	Column heading above the list of organizations (and suborganizations, if selected) based on the search criteria for each routing list in DTS.
Routing List Name	Column heading above the routing list names for the organization based on the search criteria.
Default Routing List	Column heading above the indicators that identify whether or not the routing list is designated as a default routing list.
Add Routing Element	Button used to add routing elements to every routing list that is checked in the Globally Update column.
Remove Routing Element	Button used to remove routing elements from every routing list that is checked in the Globally Update column.
Replace Signature Authority	Button used to substitute an RO with a new RO in every routing list that is checked in the Globally Update column.

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 5-6). 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 an RO (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).

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCS D
Group Access: DTMOCS D - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 06, 2008 - 11:05 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: **NOCTO** Default Routing List: Yes No [Add Routing Element](#)

Organization Name: **DTMOCS D**

Edit	Document Type	Document Status	Signature Name	Level	Process Name
Update Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	APPROVED	CHRIS A CARSONA	25	
Update Remove	Authorization	APPROVED	HELEN D CARSONA	25	
Update Remove	Local Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Local Voucher	APPROVED	HELEN D CARSONA	25	
Update Remove	Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Voucher	APPROVED	HELEN D CARSONA	25	

[Save Changes](#) [Cancel](#)

Figure 5-6: Update Routing List Screen

3. Select **Add Routing Element** to add elements to the existing routing list.
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).

Chapter 5: Routing Lists

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 11:08 EDT

Screen ID: 7205.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Add Routing Element * Required

Routing List Name: NOCTO
Organization Name: DTMOCS

Document Type: * Authorization
Document Status: * REVIEWED
Signature Name: * Search Xorg Search
Level: *
Process Name:

Add Routing Element Cancel

Figure 5-7: Add Routing Element Screen

6. Select **Search**.

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.

Screen ID: 7803.1
Help for this Screen

Search People * Required

Organization Name: * DTMOCS --Include Sub-Organizations

SSN:

OR

Last Name:
First Name:

You must specify at least an SSN or a name (last required, first optional) in addition to specifying an Organization name. If you choose to enter matching information for both the SSN and the name, you may get a match. However, if the set of SSN and name you entered do not belong to the same person, no result will be shown even if the SSN or the name you entered is correct. For best results, it is recommended that you enter either an SSN or a name, but not both.

Search Close Window

Figure 5-8: Search People Screen

Table 5-4: Search People Screen Description

SEARCH PEOPLE SCREEN DESCRIPTIONS	
FIELD OR OBJECT	DESCRIPTION
Organization Name	Drop-down list from which to select the organization to search.
Include Sub-Organizations	Check box that, when checked, will include suborganizations in the search.
SSN	SSN of the person. Either the SSN or the last name must be used to drive the search.
Last Name	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.
First Name	Field in which to enter all or part of the first name of the person (optional).
Search	Button used to initiate the search.
Close Window	Button used to cancel the search.

7. Select the **Organization Name** drop-down list to select the organization of the RO who will be associated with the document type and stamp for the routing list.
8. Enter the search criteria.

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

9. Select **Search**.

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

Screen ID: 7804.1
[Help for this Screen](#)

Search People Results

Organization Name: **DTMOCSD** Last Name: **carson** SSN:
 Include Sub-Organizations: **false** First Name:

Select Person	Name	SSN	Organization
<input type="button" value="Select"/>	CARSONA, CHRIS A	999962346	DTMOCSD
<input type="button" value="Select"/>	CARSONA, ERIC T	999962361	DTMOCSD
<input type="button" value="Select"/>	CARSONA, HELEN D	999962376	DTMOCSD

1 - 3 of 3

Figure 5-9: Search People Results Screen

Chapter 5: Routing Lists

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

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

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

The screenshot displays the 'Add Routing Element' screen within the Defense Travel System. The header includes the system logo, user name (HELEN CARSONA), organization (DTMOCSD), and various navigation links. The main form area contains the following fields and values:

- Routing List Name:** NOCTO
- Organization Name:** DTMOCSD
- Document Type:** Authorization
- Document Status:** REVIEWED
- Signature Name:** CHRIS A CARSONA
- Level:** 15
- Process Name:** (blank)

Buttons for 'Search', 'Xorg Search', 'Add Routing Element', and 'Cancel' are visible at the bottom of the form.

Figure 5-10: Add Routing Element Screen

Leaving gaps in between the levels allows for future additions. It is recommended that the DTA set up routing lists with the level numbers assigned in increments of five.

- Select the **Process Name** drop-down list to select one of the values from the list if conditional routing is required. Otherwise leave this field blank.
- Select **Add Routing Element**.
- Repeat steps 3 through 13 if additional routing elements are required.

Chapter 5: Routing Lists

15. Select **Save Changes** once all routing elements have been added to the routing list (Figure 5-11).

User Name: HELEN CARSONA
Organization Access: DTMOCS D
Group Access: DTMOCS D - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 11:12 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: NOCTO Default Routing List: Yes No [Add Routing Element](#)

Organization Name: DTMOCS D

Edit	Document Type	Document Status	Signature Name	Level	Process Name
Update Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	APPROVED	CHRIS A CARSONA	25	
Update Remove	Authorization	APPROVED	HELEN D CARSONA	25	
Update Remove	Local Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Local Voucher	APPROVED	HELEN D CARSONA	25	
Update Remove	Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Voucher	APPROVED	HELEN D CARSONA	25	
Update Remove	Authorization	REVIEWED	CHRIS A CARSONA	15	

[Save Changes](#) [Cancel](#)

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 ROs who are out of the office so that the routing of documents will not be interrupted. When creating the routing list, repeat the sequence number for the same stamp, entering the name and SSN of another RO. Each RO at the same sequence number receives simultaneous notification of the document in the queue. When one of the ROs stamps the document, DTS removes the document from the other RO's 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 automatically add CTO SUBMIT at level 2 and CTO BOOKED at level 3 of the routing list.

User Name: HELEN CARSONA
Organization Access: DTMOCS D
Group Access: DTMOCS D - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 11:13 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: 205RL Default Routing List: Yes [Add Routing Element](#) [Populate CTO Stamps](#)

Organization Name: DTMOCS D205

Edit	Document Type	Document Status	Signature Name	Level	Process Name
No routing elements are currently defined for the routing list					

[Save Changes](#) [Cancel](#)

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

5.6.2.2 Add Routing Elements That Are 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 in that 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.

The Update Routing List screen opens (Figure 5-11).

3. Select **Add Routing Element** to add elements to the existing routing list.

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** (Figure 5-13).

The screenshot shows the 'Add Routing Element' screen in the Defense Travel System. The header includes the system logo, user name (HELEN CARSONA), organization access (DTMOCSD), group access (DTMOCSD - CSD), permission (0, 1, 2, 3, 4, 5, 6), and run date (July 08, 2008 - 11:15 EDT). The 'DTA Tools' menu is open, showing 'Routing Lists' selected. The main content area is titled 'Add Routing Element' and contains a form with the following fields and buttons:

- Routing List Name: 205RL
- Organization Name: DTMOCSD205
- Document Type: * Authorization (dropdown)
- Document Status: * APPROVED (dropdown)
- Signature Name: * (text input) Search Xorg Search
- Level: * (text input)
- Process Name: (dropdown)
- Buttons: Add Routing Element, Cancel

Figure 5-13: Add Routing Element Screen

6. Select **Xorg Search**.

Chapter 5: Routing Lists

The Xorg Search People screen opens (Figure 5-14). See Table 5-6 for a description of the Xorg Search People screen.

Screen ID: 7805.1
[Help for this Screen](#)

Search People * Required

SSN: *

Figure 5-14: Xorg Search People Screen

Table 5-6: Xorg People Search Screen Descriptions

XORG PEOPLE SEARCH SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
SSN	Field in which to enter the SSN to search for individual from an outside organization.
Search	Button used to initiate the search outside of the DTAs organization.
Close Window	Button used to exit this search.

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

7. Enter the SSN of the appropriate RO.
8. Select **Search**.

The Search People Results screen displays the RO's name and SSN (Figure 5-15).

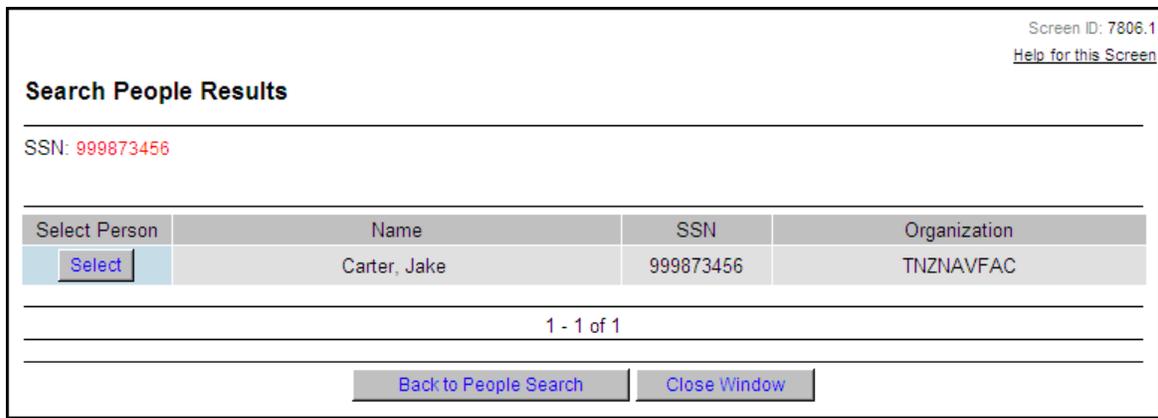


Figure 5-15: Search People Results Screen

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).

Figure 5-16: Add Routing Element Screen

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 one of the values 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. The below 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).

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A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCS D
Group Access: DTMOCS D - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 11:05 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: NOCTO Default Routing List: Yes No [Add Routing Element](#)

Organization Name: DTMOCS D

Edit		Document Type	Document Status	Signature Name	Level	Process Name
Update	Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update	Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update	Remove	Authorization	APPROVED	CHRIS A CARSONA	25	
Update	Remove	Authorization	APPROVED	HELEN D CARSONA	25	
Update	Remove	Local Voucher	APPROVED	CHRIS A CARSONA	25	
Update	Remove	Local Voucher	APPROVED	HELEN D CARSONA	25	
Update	Remove	Voucher	APPROVED	CHRIS A CARSONA	25	
Update	Remove	Voucher	APPROVED	HELEN D CARSONA	25	

[Save Changes](#) [Cancel](#)

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.

Chapter 5: Routing Lists

- Select the **Process Name** drop-down list to choose one of the conditional routing values from the list (Figure 5-18).

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

The process names are described in Table 5-7.

Table 5-7: Process Name Descriptions

PROCESS NAME DESCRIPTIONS	
PROCESS NAME	DESCRIPTION
BYPASS PNR	Applies if the Travel feature is not used to make reservations. In such a case, the authorization will not require CTO processing.
FOREIGN TRAVEL	Applies if the traveler's duty station is CONUS, e.g., California to Korea or Virginia to Japan.
OCONUS/CONUS	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.
OCONUS/OCONUS	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.
PREMIUM CLASS FARE	Used when policy allows purchase of premium air fares.
SPECIAL CIRCUMSTANCES	Checks the Special Circumstances trip type used and routes the document to the designated RO. See Section 5.6.2.3.1.
TRAVEL MODE ROUTE	Checks the transportation mode used during TDY travel and routes the document to the designated RO for that transportation mode. See Section 5.6.2.3.2.

Table 5-7: Process Name Descriptions (continued)

PROCESS NAME DESCRIPTIONS	
PROCESS NAME	DESCRIPTION
TRAVELER NUMBER	Checks the number of travelers in a group authorization and routes the document to the Transportation Officer (TO) if the group exceeds 9 travelers.
LEAVE REQUESTED	Checks the voucher for annual or non-duty leave and routes the voucher to the applicable RO. See Section 5.6.2.3.3. This option is available for voucher only.

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 shows an example in which all documents for travelers who use the 205RL routing list will be sent to Chris Carsona to be stamped APPROVED. If a document is created that

has an OCONUS per diem location, the document will route to Eric Carsona first to be REVIEWED, and then to Chris Carsona to be APPROVED.

The screenshot displays the 'Update Routing List' interface in the Defense Travel System. At the top, it shows the user's name (HELEN CARSONA), organization (DTMOCSD), and various access and permission details. The main content area is titled 'Update Routing List' and shows the current routing list name as '205RL' and the organization as 'DTMOCSD205'. There are two routing elements listed in a table:

Edit	Document Type	Document Status	Signature Name	Level	Process Name
Update Remove	Authorization	APPROVED	CHRIS A CARSONA	25	
Update Remove	Authorization	REVIEWED1	ERIC T CARSONA	20	FOREIGN TRAVEL

Buttons for 'Add Routing Element', 'Populate CTO Stamps', 'Save Changes', and 'Cancel' are visible at the bottom of the table area.

Figure 5-19: Sample Routing List With a Conditional Element

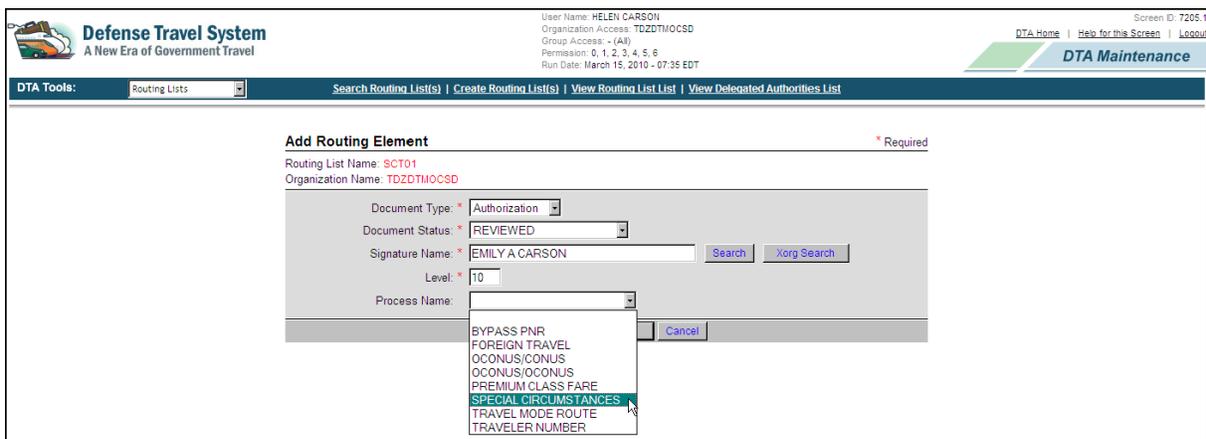
5.6.2.3.1 Conditional Routing for Special Circumstances

Special Circumstances Travel (SCT) eligibility is typically determined by the personnel, medical, or other authorities rather than the AO. Therefore, conditional routing may be used to route the document to the appropriate ROs. 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 RO 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.

Chapter 5: Routing Lists

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



The screenshot shows the 'Add Routing Element' screen in the Defense Travel System. The user is HELEN CARSON, and the organization is TDZDTMOCSD. The routing list name is SCT01. The document type is Authorization, and the status is REVIEWED. The signature name is EMILY A CARSON. The level is 10. The process name dropdown menu is open, showing options: BYPASS PNR, FOREIGN TRAVEL, OCONUS/CONUS, OCONUS/OCONUS, PREMIUM CLASS FARE, SPECIAL CIRCUMSTANCES (highlighted), TRAVEL MODE ROUTE, and TRAVELER NUMBER. There are Search and Xorg Search buttons, and a Cancel button.

Figure 5-20: Add Routing Element Screen - Special Circumstances Check Boxes

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.



The screenshot shows the 'Add Routing Element' screen in the Defense Travel System. The user is HELEN CARSON, and the organization is TDZDTMOCSD. The routing list name is SCT01. The document type is Authorization, and the status is REVIEWED. The signature name is EMILY A CARSON. The level is 10. The process name is SPECIAL CIRCUMSTANCES. The trip type(s) section is expanded, showing a list of trip types with checkboxes:

<input type="checkbox"/> STUDENT DODEA ACADEM C C	<input type="checkbox"/> AMATEUR SPORTS COMP
<input type="checkbox"/> CADET-MIDSHIPMEN	<input type="checkbox"/> ESCORT-ATTEND EMP RETURN
<input type="checkbox"/> FAM MEM CIV ILL MIL SPON	<input type="checkbox"/> CONGRESSIONAL TRAVEL
<input type="checkbox"/> MEDIC CONVALESCENT LEAVE	<input type="checkbox"/> STUDENT OF CIV US SCHOOL
<input type="checkbox"/> MEDIC CIV EMP OCONUS	<input type="checkbox"/> ESCORT-ATTEND FULL TDY
<input type="checkbox"/> EMERGENCY VISIT TRVL EVT	<input type="checkbox"/> MEDIC FAM ATTND OVR100MI
<input type="checkbox"/> FEMIL-FUND ENVIRO MORALE	<input type="checkbox"/> FAM VISIT TRAVEL (FVT)
<input type="checkbox"/> STUDENT SPEC DODEA EVAL	<input type="checkbox"/> PRE EMPLOYMENT FULL TDY
<input type="checkbox"/> PRE EMPLOY PERDIEM ONLY	<input type="checkbox"/> PRE EMPLOY TRANS ONLY
<input type="checkbox"/> LABOR ORG REPRESENTATIVE	<input type="checkbox"/> DISCIPLINARY ACTION
<input type="checkbox"/> STUDENT OF MIL US SCHOOL	<input type="checkbox"/> R R AND SPECIAL R R
<input type="checkbox"/> RECALL FROM LEAVE	<input type="checkbox"/> SHIP RELOCATED WHEN AWAY
<input type="checkbox"/> TDRL DISABLED PHYS EXAM	<input type="checkbox"/> MEDIC MIL MEMBER TDY
<input type="checkbox"/> EMERGENCY LEAVE	<input type="checkbox"/> NON-FEDERAL HONOR AWARD
<input type="checkbox"/> UN PEACEKEEPING TDY	

At the bottom, there are 'Add Routing Element' and 'Cancel' buttons.

Figure 5-21: Add Routing Element Screen - Special Circumstances

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).

The screenshot displays the 'Add Routing Element' screen in the Defense Travel System. At the top, the user is identified as HELEN CARSONA from the DTMOCS D organization. The screen ID is 7205.1. The main navigation bar includes 'DTA Tools' with a dropdown menu set to 'Routing Lists', and several action links: 'Search Routing List(s)', 'Create Routing List(s)', 'View Routing List List', and 'View Delegated Authorities List'. The 'DTA Maintenance' link is also visible. The form itself is titled 'Add Routing Element' and includes a '* Required' indicator. The 'Routing List Name' is '205RL' and the 'Organization Name' is 'DTMOCS D205'. The form fields are: 'Document Type' (Authorization), 'Document Status' (REVIEWED2), 'Signature Name' (HELEN D CARSONA) with 'Search' and 'Xorg Search' buttons, 'Level' (15), and 'Process Name' (dropdown menu). The dropdown menu is open, showing a list of process names: 'BYPASS PNR', 'FOREIGN TRAVEL', 'OCONUS/CONUS', 'OCONUS/OCONUS', 'PREMIUM CLASS FARE', 'TRAVEL MODE ROUTE' (highlighted in blue), and 'TRAVELER NUMBER'. There are 'Submit' and 'Cancel' buttons at the bottom of the form.

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

The screen refreshes and displays the Travel Modes.

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

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCS D
Group Access: DTMOCS D - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 11:27 EDT

DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Add Routing Element * Required

Routing List Name: 205RL
Organization Name: DTMOCS D205

Document Type: * Authorization
Document Status: * REVIEWED2
Signature Name: * HELEN D CARSONA [Search] [Xorg Search]
Level: * 15
Process Name: TRAVEL MODE ROUTE

Travel Mode(s): *

CA CB CF CF-C
 CP CP-C CR CR-C
 CV GA GB GP
 GV PA PM PP
 PV TB TP TR
 TV

[Add Routing Element] [Cancel]

Figure 5-23: Update Routing List Screen - Leave Requested

Table 5-8: Travel Modes

TRAVEL MODES		
MODE	DESCRIPTION	EXPENSE CATEGORY
CA	Commercial Auto TDY/TAD	RENTAL CAR
CB	Commercial Bus	COM. CARR.-I
CF	CTO FEE (IBA)	COM.CARR.-I
CF-C	CTO FEE (CBA)	COM.CARR.-C
CP	Commercial Plane	COM. CARR.-I
CP-C	Commercial Plane (CBA)	COM. CARR.-C
CR	Commercial Rail (IBA)	COM. CARR.-I
CR-C	Commercial Rail (CBA)	COM. CARR.-C
CV	Commercial Vessel	COM. CARR.-C
GA	Government Auto	TRANSPORT

Table 5-8: Travel Modes (continued)

TRAVEL MODES		
MODE	DESCRIPTION	EXPENSE CATEGORY
GB	Government Bus	TRANSPORT
GP	Government Plane	TRANSPORT
GV	Government Vessel	TRANSPORT
PA	Private Auto TDY/TAD	MILEAGE
PM	Private Motorcycle TDY/TAD	MILEAGE
PP	Private Plane	MILEAGE
PV	Private Vessel	MILEAGE
TB	Prepaid Bus	COM. CARR.-T
TP	Prepaid Plane	COM. CARR.-T
TR	Prepaid Rail	COM. CARR.-T
TV	Prepaid Vessel	COM. CARR.-T

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 RO specified in the routing list at the level indicated. See the *Document Processing Manual*, Section 2.7.3 to find out 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).

The screenshot shows the 'Add Routing Element' screen in the Defense Travel System. The page header includes the Defense Travel System logo and user information: User Name: HELEN CARSONA, Organization Access: DTMOCS D, Group Access: DTMOCS D - CSD, Permission: 0, 1, 2, 3, 4, 5, 6, Run Date: July 08, 2008 - 15:25 EDT. The page title is 'Add Routing Element' with a '* Required' indicator. The form contains the following fields and values:

- Routing List Name: 205RL
- Organization Name: DTMOCS D205
- Document Type: * Voucher
- Document Status: * REVIEWED1
- Signature Name: * HELEN D CARSONA
- Level: * 15
- Process Name: (dropdown menu open showing options: FOREIGN TRAVEL, LEAVE REQUESTED, TRAVEL MODE ROUTE)

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

7. Select **Add Routing Element**.

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

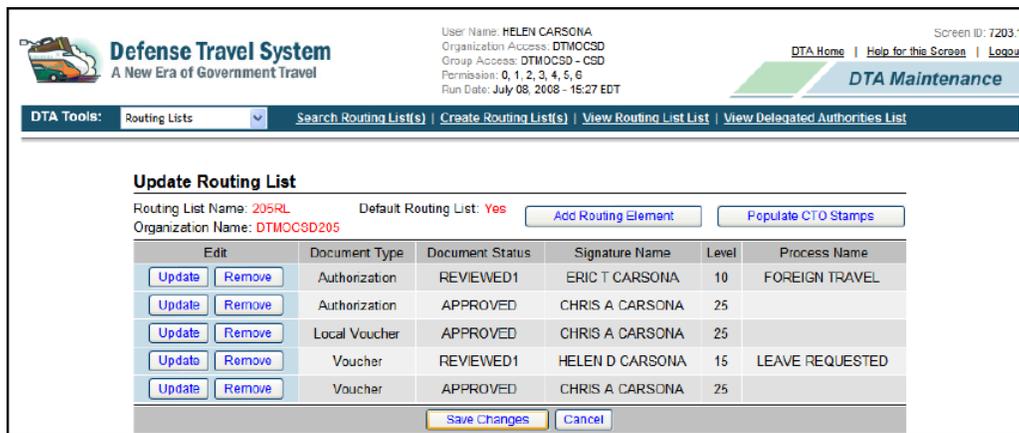


Figure 5-25: Update Routing List Screen - Leave Requested

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).

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSON
Organization Access: TDZDTMOCSD
Group Access: - (All)
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: March 15, 2010 - 10:45 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: CSD Default Routing List: Yes [Add Routing Element](#)

Organization Name: TDZDTMOCSD

Edit		Document Type	Document Status	Signature Name	Level	Process Name
Update	Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update	Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update	Remove	Authorization	REVIEWED	CHRIS A CARSON	10	
Update	Remove	Authorization	REVIEWED	EMILY A CARSON	10	
Update	Remove	Authorization	APPROVED	HELEN D CARSON	25	
Update	Remove	Authorization	APPROVED	Chris A Zurcher	25	
Update	Remove	Local Voucher	APPROVED	HELEN D CARSON	25	
Update	Remove	Local Voucher	APPROVED	Chris A Zurcher	25	
Update	Remove	Voucher	APPROVED	HELEN D CARSON	25	
Update	Remove	Voucher	APPROVED	Chris A Zurcher	25	

[Save Changes](#) [Cancel](#)

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

3. Select **Remove** for the routing element to be deleted.

The screen refreshes and no longer displays the removed element (Figure 5-27).

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSON
Organization Access: TDZDTMOCSD
Group Access: - (All)
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: March 15, 2010 - 10:49 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout
DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: **CSD** Default Routing List: **Yes** [Add Routing Element](#)
Organization Name: **TDZDTMOCSD**

Edit		Document Type	Document Status	Signature Name	Level	Process Name
Update	Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update	Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update	Remove	Authorization	REVIEWED	CHRIS A CARSON	10	
Update	Remove	Authorization	REVIEWED	EMILY A CARSON	10	
Update	Remove	Authorization	APPROVED	HELEN D CARSON	25	
Update	Remove	Authorization	APPROVED	Chris A Zurcher	25	
Update	Remove	Local Voucher	APPROVED	HELEN D CARSON	25	
Update	Remove	Local Voucher	APPROVED	Chris A Zurcher	25	
Update	Remove	Voucher	APPROVED	HELEN D CARSON	25	

[Save Changes](#) [Cancel](#)

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

- Repeat the step above for each element to be removed from the selected routing list.
- 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:

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

Chapter 5: Routing Lists

User Name: HELEN CARSON
 Organization Access: TDZDTMOCSD
 Group Access: - (All)
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: March 15, 2010 - 08:11 EDT

Screen ID: 7201.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **TDZDTMOCSD**
 Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	CSD_Emergency	No
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	SCT01	No
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	Test_Routing	No
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	TRAINING	No
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSD	TRAINING TEAM	No
<input type="checkbox"/>	Update Copy Delete	TDZDTMOCSDPMTrain	PMTeam Training	Yes

[Select All](#) [Clear All](#)

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

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Figure 5-28: Routing List(s) (Search Results) Screen

The Copy Routing List screen opens (Figure 5-30). This screen displays the information from the copied routing list.

User Name: HELEN CARSON
 Organization Access: TDZDTMOCSD
 Group Access: - (All)
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: March 15, 2010 - 08:15 EDT

Screen ID: 7202.2
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Copy Routing List * Required

Routing List Name: **TRAINING**
 Organization Name: **TDZDTMOCSD**

New Routing List Name: *
 Organization Name: *

Make this the default routing list?: Yes No [Note: Changing the default routing list will only affect newly created travelers and those re-assigned to the organization. It has no affect on the default routing list of travelers who have already been created.]

[Copy Routing List](#) [Cancel](#)

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 5-8 for a description of the Copy Routing List screen.

Table 5-9: Copy Routing List Screen Description

COPY ROUTING LIST SCREEN DESCRIPTIONS	
FIELD OR OBJECT	DESCRIPTION
Routing List Name	Identifier that shows the name of the routing list for the details displayed.
Organization Name	Identifier that shows the name of the organization for the routing list and details displayed.
New Routing List Name	Field that automatically displays the name of the copied routing list. The new routing list may be renamed.
Organization Name	Drop-down list from which to select the name of the organization to which the copied routing list will be associated.
Make this the default routing list?	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.
Copy Routing List	Button used to save the newly created routing list.
Cancel	Button used to exit this screen without saving the new list.

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

4. Select **Update** to change or confirm the routing elements are correct for the destination and routing list.

Chapter 5: Routing Lists

See the following sections for instructions about how to complete the new routing list:

- 5.6.2.1 Add Routing Elements From Inside the Organization
- 5.6.2.2 Add Routing Elements That Are 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).

Defense Travel System
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User Name: HELEN CARSON
Organization Access: TDZDTMOCSD
Group Access: - (All)
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: March 15, 2010 - 08:25 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: **DEPLOYMENT TRNG** Default Routing List: Yes No [Add Routing Element](#)

Organization Name: **TDZDTMOCSD**

Edit		Document Type	Document Status	Signature Name	Level	Process Name
Update	Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update	Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update	Remove	Authorization	REVIEWED	EMILY A CARSON	10	
Update	Remove	Authorization	REVIEWED1	Helen D Dean	15	FOREIGN TRAVEL
Update	Remove	Authorization	APPROVED	HELEN D CARSON	25	
Update	Remove	Authorization	REVIEWED	Kim T Carson	10	
Update	Remove	Authorization	APPROVED	CHRIS A CARSON	25	

[Save Changes](#) [Cancel](#)

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 while it is being 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 that is 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:

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSON
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: August 07, 2008 - 16:09 EDT

Screen ID: 7201.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCS**
Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCS	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS	NOCTO	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	OPERATIONS	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	Self AO	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	TRAINING	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	205RL	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	MEDICAL	No

Select All Clear All

Globally Update Selected Routing Lists (on this page)

Add Routing Element Remove Routing Element Replace Signature Authority

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Figure 5-32: Routing List(s) (Search Results) Screen

1. Select **Delete** to choose the routing list to be deleted.

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

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSON
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 06, 2008 - 15:55 EDT

Screen ID: 7204.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Delete Routing List

Routing List Name: NOCTO
Organization Name: DTMOCS
Default Routing List: false

Delete Routing List Cancel

Figure 5-33: Delete Routing List Screen

2. Verify the details for the selected routing list and confirm that it is the one to be deleted.
3. Select **Delete Routing List**.

Chapter 5: Routing Lists

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

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User Name: HELEN CARSON
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: August 07, 2008 - 16:10 EDT

Screen ID: 7201.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCS**
Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCS	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS	OPERATIONS	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	Self AO	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	TRAINING	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	205RL	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	MEDICAL	No

Select All Clear All

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

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Figure 5-34: Routing List(s) (Search Results) Screen - Routing List Deleted

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.

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A New Era of Government Travel

User Name: HELEN CARSON
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 16:04 EDT

Screen ID: 7204.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

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

Routing List Name: CSD
Organization Name: DTMOCS
Default Routing List: true

[Delete Routing List](#) [Cancel](#)

Figure 5-35: Delete Routing List Screen With Error Message

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).

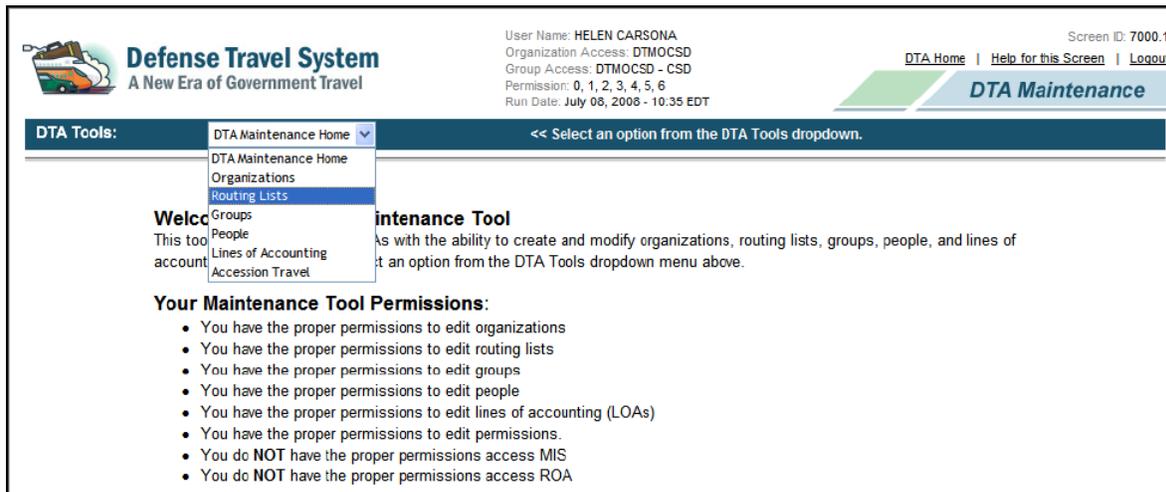


Figure 5-36: DTA Maintenance Tool Home Page

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).

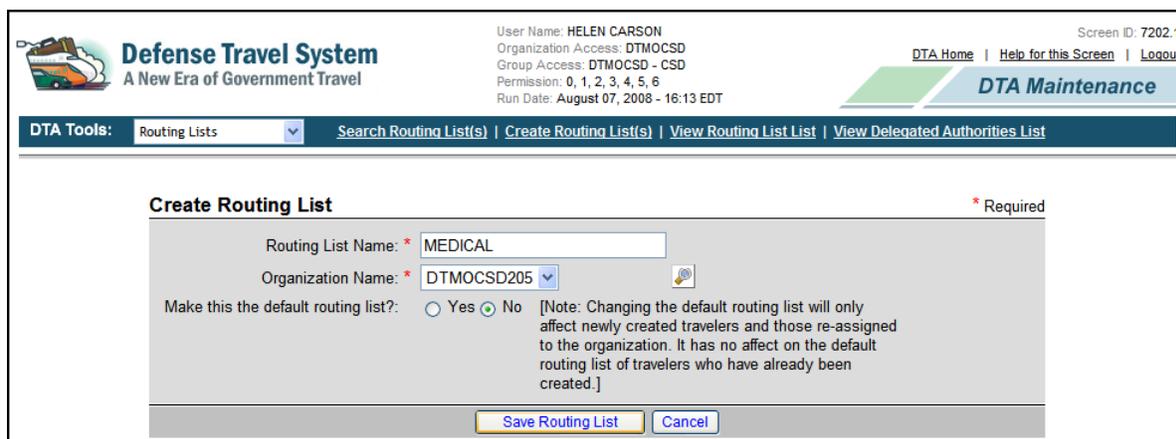


Figure 5-37: Create Routing List Screen

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

Chapter 5: Routing Lists

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

Table 5-10: Create Routing List Screen Description

CREATE ROUTING LIST SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Routing List Name	Field in which to enter the name of the routing list that to be created.
Organization Name	Drop-down list of organization names. Use to select the organization to which a DTA will add the new routing list.
Make this the default routing list?	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.
Save Routing List	Button used to save the newly created routing list.
Cancel	Button used to exit this screen without saving the list.

4. Select the **Organization Name** drop-down list and choose the **organization** to which 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.

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User Name: HELEN CARSON
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: August 07, 2008 - 16:15 EDT

Screen ID: 7201.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCS**
Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCS	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS	OPERATIONS	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	Self AO	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS	TRAINING	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	205RL	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS205	MEDICAL	No

[Select All](#) [Clear All](#)

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

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Figure 5-38: Routing List(s) (Search Results) Screen

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).

Chapter 5: Routing Lists

User Name: HELEN CARSON
 Organization Access: DTMOCSO
 Group Access: DTMOCSO - CSD
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: August 07, 2008 - 16:15 EDT

Screen ID: 7201.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)
DTA Maintenance

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCSO**
 Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCSO	OPERATIONS	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSO	Self AO	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSO	TRAINING	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSO205	205RL	Yes
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSO205	MEDICAL	No

[Select All](#) [Clear All](#)

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

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Figure 5-39: Routing List(s) (Search Results) Screen - Globally Update Checked

2. Select **Add Routing Element**.

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.

User Name: HELEN CARSON
 Organization Access: DTMOCSO
 Group Access: DTMOCSO - CSD
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: July 08, 2008 - 16:09 EDT

Screen ID: 7206.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)
DTA Maintenance

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Globally Add Routing Element * Required

Document Type: *

Document Status: * You must select an option from the 'Document Type' list.

Signature Name: * [Search](#) † [Xorg Search](#) †

Level: *

Process Name: You must select an option from the 'Document Status' list.

† Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCSO	TRAINING	No
DTMOCSO205	205 Emergency	No
DTMOCSO205	205RL	Yes
DTMOCSO205	MEDICAL	No

[Globally Add Routing Element](#) [Cancel](#)

Figure 5-40: Globally Add Routing Element Screen

Table 5-11: Globally Add Routing Element Screen Description

GLOBALLY ADD ROUTING ELEMENT SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Document Type	Drop-down list to choose the type of document to which the selected routing list applies.
Document Status	Drop-down list to choose the stamp to be applied to the document (e.g., APPROVED).
Signature Name	Name of RO or status in the system to whom the document must route before proceeding to the next step.
Search	Button used to search for the signature name.
Xorg Search	Button used to search for the signature name from another organization using the SSN.
Level	Level of the stamp in the routing list of a document.
Process Name	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.
Routing List(s) To Be Updated	Heading above the organization names and routing lists that will be affected by this global change.
Organization Name	Column heading above the name(s) of the organization(s) that will be updated.
Routing List Name	Column heading above the names of the routing lists that will be updated.
Default Routing List	Column heading above indicators that display whether or not the routing list being updated is the default routing list.
Globally Add Routing Element	Button used to save updates to the identified routing lists.
Cancel	Button used to cancel without making any changes.

Chapter 5: Routing Lists

- Complete the **Document Type**, **Document Status**, **Signature Name**, and **Level** fields (Figure 5-41).

Globally Add Routing Element * Required

Document Type: * Voucher
 Document Status: * APPROVED
 Signature Name: * CHRIS A CARSON Search Xorg Search
 Level: * 25
 Process Name: *

↑ Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCSD	Self AO	No
DTMOCSD	TRAINING	No
DTMOCSD205	205RL	Yes
DTMOCSD205	MEDICAL	No

Globally Add Routing Element Cancel

Figure 5-41: Globally Add Routing Element Screen

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

Organization Name	Routing List Name	Default Routing List	Update Result
DTMOCSD	Self AO	No	Successful
DTMOCSD	TRAINING	No	Successful
DTMOCSD205	205RL	Yes	Successful
DTMOCSD205	MEDICAL	No	Successful

OK

Figure 5-42: Globally Add Routing Element Summary Screen

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

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

The four routing lists shown in Figure 5-42 have been updated with Chris Carsona as the RO who will approve vouchers.

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

The screenshot shows the 'Routing List(s) (Search Results)' screen. At the top, it displays the user name 'HELEN CARSON' and organization 'DTMOCSD'. The page title is 'Defense Travel System - A New Era of Government Travel'. Below the header, there are navigation links for 'DTA Home', 'Help for this Screen', and 'Logout'. The main content area shows a table of routing lists with the following data:

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCSD	CSD	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCSD	OPERATIONS	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSD	Self AO	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSD	TRAINING	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCSD205	205RL	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCSD205	MEDICAL	No

Below the table, there are buttons for 'Add Routing Element', 'Remove Routing Element', and 'Replace Signature Authority'. The page also shows '1 - 6 of 6' at the bottom.

Figure 5-43: Routing List(s) (Search Results) Screen

2. Select **Remove Routing Element**.

The Globally Remove Routing Element screen opens.

Chapter 5: Routing Lists

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

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCSO
Group Access: DTMOCSO - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 06, 2008 - 16:21 EDT

Screen ID: 7206.2
DTA Home | Help for this Screen | Logout
DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Globally Remove Routing Element

Document Type: ¹ Voucher
Document Status: ² APPROVED
Signature Name: ² CHRIS A CARSONA [Search] † [Xorg Search] †
Level: ¹ 25

¹ This is not a required field, but if inputted, at least one other field must be inputted
² This is not a required field, but may be the only field with an input
† Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCSO	TRAINING	No
DTMOCSO205	205 Emergency	No
DTMOCSO205	MEDICAL	No

[Globally Remove Routing Element] [Cancel]

Figure 5-44: Globally Remove Routing Element Screen

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).

User Name: HELEN CARSON
 Organization Access: DTMOCS D
 Group Access: DTMOCS D - CSD
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: August 07, 2008 - 16:22 EDT

Screen ID: 7201.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)
DTA Maintenance

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Routing List(s) (Search Results)

Routing List Name: _____ Organization Name: **DTMOCS D**
 Default Routing Lists Only: **No** Include Sub-Organizations: **Yes**

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update Copy Delete	DTMOCS D	CSD	Yes
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCS D	OPERATIONS	No
<input type="checkbox"/>	Update Copy Delete	DTMOCS D	Self AO	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCS D	TRAINING	No
<input checked="" type="checkbox"/>	Update Copy Delete	DTMOCS D205	205RL	Yes
<input type="checkbox"/>	Update Copy Delete	DTMOCS D205	MEDICAL	No

[Select All](#) [Clear All](#)

Globally Update Selected Routing Lists (on this page)

[Add Routing Element](#) [Remove Routing Element](#) [Replace Signature Authority](#)

1 - 6 of 6

Figure 5-45: Routing List(s) (Search Results) Screen - Globally Update Checked

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.

User Name: HELEN CARSON
 Organization Access: DTMOCS D
 Group Access: DTMOCS D - CSD
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: August 07, 2008 - 16:25 EDT

Screen ID: 7206.3
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)
DTA Maintenance

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

Globally Replace Signature Authority * Required

Old Signature Name: * [Search](#) † [Xorg Search](#) †

New Signature Name: * [Search](#) † [Xorg Search](#) †

† Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCS D	OPERATIONS	No
DTMOCS D	TRAINING	No
DTMOCS D205	205RL	Yes

[Globally Replace Signature Authority](#) [Cancel](#)

Figure 5-46: Globally Replace Signature Authority Screen

Table 5-12: Globally Replace Signature Authority Screen Description

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

3. Complete the **Old Signature Name** field.
4. 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.

Figure 5-47: Search People Screen

Figure 5-48: Search People Screen (Xorg)

5. Enter the **SSN** or **last name** of the signature name.
6. Select **Search**.

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

Screen ID: 7806.4
[Help for this Screen](#)

Search People Results

SSN: 999962346

Select Person	Name	SSN	Organization
<input type="button" value="Select"/>	CARSONA, CHRIS A	999962346	DTMOCS D

1 - 1 of 1

Figure 5-49: Search People Results Screen

7. Choose **Select** to select the signature name.

The signature names display on the Globally Replace Signature Authority screen (Figure 5-50).

Screen ID: 7206.3
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)

DTA Tools: Routing Lists | [Search Routing List\(s\)](#) | [Create Routing List\(s\)](#) | [View Routing List List](#) | [View Delegated Authorities List](#)

User Name: HELEN CARSON
 Organization Access: DTMOCS D
 Group Access: DTMOCS D - CSD
 Permission: 0, 1, 2, 3, 4, 5, 6
 Run Date: August 07, 2008 - 16:31 EDT

Globally Replace Signature Authority * Required

Old Signature Name:* CHRIS A CARSON † †

New Signature Name:* Victor Simpson † †

† Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCS D	OPERATIONS	No
DTMOCS D	TRAINING	No
DTMOCS D205	MEDICAL	No

Figure 5-50: Globally Replace Signature Authority Screen

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

9. 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 5-51).

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCS
Group Access: DTMOCS - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 16:28 EDT

Screen ID: 7207.3
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Globally Replace Signature Authority Summary

Organization Name	Routing List Name	Default Routing List	Update Result
DTMOCS	OPERATIONS	No	Successful
DTMOCS	TRAINING	No	Successful
DTMOCS205	205 Emergency	No	Successful

OK

Figure 5-51: Globally Replace Signature Authority Summary Screen

10. 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 only if no request for a non-ATM advance or no scheduled partial payments (SPPs) have been requested. 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

In order 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*.

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, use 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 traveler's name or SSN.

The Search People Results screen opens.

9. Choose **Select** next to the name of the traveler.
10. Enter the **Level** for the AO (use the same level as the backup AO).
11. Leave the Process Name field blank.
12. Select **Add Routing Element** to accept the entered element.

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

Defense Travel System
A New Era of Government Travel

User Name: HELEN CARSONA
Organization Access: DTMOCSO
Group Access: DTMOCSO - CSD
Permission: 0, 1, 2, 3, 4, 5, 6
Run Date: July 08, 2008 - 16:33 EDT

Screen ID: 7203.1
DTA Home | Help for this Screen | Logout

DTA Maintenance

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List List | View Delegated Authorities List

Update Routing List

Routing List Name: **OPERATIONS** Default Routing List: Yes No [Add Routing Element](#)

Organization Name: **DTMOCSO**

Edit	Document Type	Document Status	Signature Name	Level	Process Name
Update Remove	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
Update Remove	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	REVIEWED	Helen D SPAWARVA-Z	20	FOREIGN TRAVEL
Update Remove	Authorization	APPROVED	CHRIS A CARSONA	25	
Update Remove	Authorization	APPROVED	HELEN D CARSONA	25	
Update Remove	Local Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Local Voucher	APPROVED	HELEN D CARSONA	25	
Update Remove	Voucher	APPROVED	CHRIS A CARSONA	25	
Update Remove	Voucher	APPROVED	HELEN D CARSONA	25	

[Save Changes](#) [Cancel](#)

Figure 5-52: Update Routing List Screen

14. 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 creating a travel document to allow that document to be routed to a different series of ROs.

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.

Use the below steps to view a list of 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**.
3. The View Routing List List screen opens (Figure 5-53).

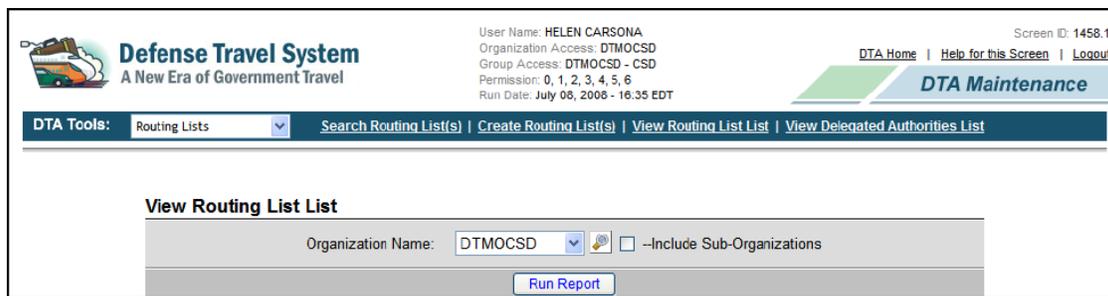


Figure 5-53: View Routing List List Screen

4. Select **Organization Name** drop-down list and choose the **organization**. A DTA's organization access limits the organizations they can search.
-OR-
Select the **magnifying glass** icon to search the organization list.
5. Check **Include Sub-Organizations** to include suborganizations in the report if needed.
6. 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 a .csv file (Excel spreadsheet).

The list of routing lists opens (Figure 5-54).

Organization Name	Routing List Name	Document Type	Document Status	Signature Name	Level	Process Name
For Official Use Only						
Title: Routing List Report Run Date: Tue Jul 08 16:36:55 EDT 2008 Search Criteria: Organization: DTMOCS D Sub-Orgs: Yes						
DTMOCS D	CSD	AUTH	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
DTMOCS D	CSD	AUTH	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
DTMOCS D	CSD	AUTH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	CSD	AUTH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	CSD	LVCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	CSD	LVCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	CSD	VCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	CSD	VCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	OPERATIONS	AUTH	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
DTMOCS D	OPERATIONS	AUTH	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
DTMOCS D	OPERATIONS	AUTH	REVIEWED	HELEN D SPAWARVA-Z	20	FOREIGN TRAVEL
DTMOCS D	OPERATIONS	AUTH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	OPERATIONS	AUTH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	OPERATIONS	LVCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	OPERATIONS	LVCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	OPERATIONS	VCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	OPERATIONS	VCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	TRAINING	AUTH	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
DTMOCS D	TRAINING	AUTH	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
DTMOCS D	TRAINING	AUTH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	TRAINING	AUTH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	TRAINING	LVCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	TRAINING	LVCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D	TRAINING	VCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D	TRAINING	VCH	APPROVED	HELEN D CARSONA	25	
DTMOCS D205	205 EMERGENCY	AUTH	REVIEWED1	ERIC T CARSONA	10	FOREIGN TRAVEL
DTMOCS D205	205 EMERGENCY	AUTH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D205	205 EMERGENCY	LVCH	APPROVED	CHRIS A CARSONA	25	
DTMOCS D205	205 EMERGENCY	VCH	REVIEWED1	HELEN D CARSONA	15	LEAVE REQUESTED
DTMOCS D205	205 EMERGENCY	VCH	APPROVED	CHRIS A CARSONA	25	

Figure 5-54: List of Routing List

5.11 View Delegated Authorities List

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

Use 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**.

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

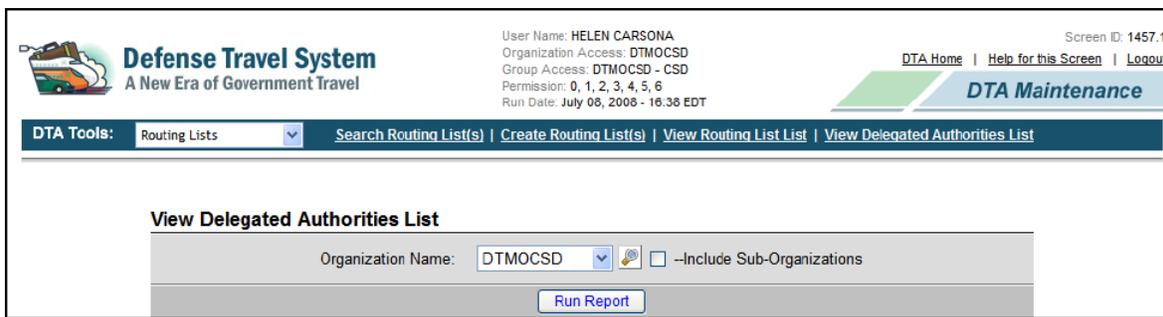


Figure 5-55: View Delegated Authorities List Screen

3. Select the **Organization Name** drop-down list and choose the **organization**. The DTA's organization access limits what organizations they will see in the list.
-OR-
Select the **magnifying glass** icon to search for the organization.
4. Check the **Include Sub-Organizations** check box to include suborganizations in the report if needed.
5. Select **Run Report**.

DTAs are prompted to download the compiled report, which may be downloaded to their computer or viewed in a separate window as a .csv file (Excel spreadsheet).

The Delegated Authorities List opens (Figure 5-56).

Last Name	First Name	Middle Initial	SSN (Last 4 digits)	Organizatic Delegate	Last Name	Delegate	Delegate	Delegate	Delegate's Organization of Assignme
Title: Delegated Authorities Report Run Date: Fri Aug 08 12:13:43 EDT 2008 Search Criteria: Organization: DTMOCSD Sub-Orgs: Yes									
CARSON	CHRIS	A	XXXXX2346	DTMOCSD	Simpson	Victor		XXXXXX111	DTMOCSD

Figure 5-56: Delegated Authorities List

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