DTS Guide 1: Getting Started

Look-Ahead Version: Content subject to change until implemented in DTS

January 24, 2018
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1 Introduction

The Defense Travel System (DTS) is a fully integrated, electronic, end-to-end travel management system that automates temporary duty (TDY) travel for the Department of Defense (DoD). It allows travelers to create authorizations, book reservations, receive approval, generate vouchers for reimbursement, and direct payments to their bank accounts and the Government Travel Charge Card (GTCC) vendor, via a single web portal. DTS is available 24 hours a day, 7 days a week.

The information paper titled, *Defense Travel System Overview*, provides more information on:

- DTS features and benefits
- The trip planning process
- DTS roles
- Training resources, and
- Help support

*This paper is available at:

This guide provides “getting started” instructions to get you started using DTS. This guide includes:

- The DTS Home Page
- Creating and Activating a DTS Profile
- Login Instructions
- The DTS Welcome Screen Navigation Bar
  - Traveler Setup Menu
- DTS Document Navigation
- Using Multiple Profiles
- Logoff Instructions
- Helpful References
2 The DTS Home Page

The DTS Home page (Figure 1-1) is located at www.defensetravel.osd.mil. From top to bottom, it contains:

1. **DTS and ETWS status icons** (indicator #1) let you know when the systems are working. When a yellow or red icon appears, select it to see specific system statuses.

2. **Travel alerts**, when posted, appear below the status icons to provide immediate information about current critical travel situations.

3. **Sign Up** and **Log In** buttons (indicator #2) allow you to create your own DTS account and launch DTS, respectively.

4. **A step-by-step travel process summary** (indicator #3) is especially useful if you’re new to DoD official travel.

5. **DoD Travel News** and **DTS Notices** (indicator #4) open travel information that – while important – is less urgent than the travel alerts, as well as important information about DTS.

6. **Buttons** (indicator #5) give you fast access to A) DTS Training, B) chat with a TAC (DoD travel Help Desk) analyst, C) TSA’s Pre✓ program, and D) the Joint Travel Regulations.

7. **Links** (indicator #6) lead to additional assistance and travel-related services.
Figure 1-1: DTS Home Page
3 Creating and Activating a DTS Profile

You must have an active DTS profile to log into DTS. There are two ways to create a DTS profile:

1. You create your own profile. This is known as self-registration. (See Section 3.1)

2. A Defense Travel Administrator (DTA) creates a profile for you. Contact your DTA for organizational guidance on this process. DTA contact information is available online at: http://www.defensetravel.dod.mil/site/localSupport.cfm.

Once you have a DTS account, you must activate it before you may use DTS. (See Section 3.2)

3.1 Self-Registering and Activating a DTS Profile

Follow the steps listed below to self-register in DTS:

1. With your CAC into the CAC reader, select Sign Up in the large blue box near the top of the DTS Welcome page (Figure 1-1).

2. Read and Accept the DoD Privacy and Ethics Policy statement.

3. Enter your CAC PIN*, then select OK. DTS tries to find and open your account.
   - If you have an active account, DTS opens. Go to Section 4.
   - If you have no account or if your account is inactive, the User Activation screen (Figure 1-2) opens. Go to step 4.

*Note: If you ever enter your CAC PIN incorrectly three times, DTS locks you out. If this happens, you must contact your Local Registration Authority (LRA) or CAC Office to unlock your CAC.
4. On the User Activation Screen:
   - Enter your Social Security number (SSN) in both text fields
   - (optional) If you are in the Reserves or National Guard and want to use your Reserve Component profile, check the Reserve/National Guard box
   - Select **Submit**.
     - If you have an inactive DTS account, DTS activates and opens it. Go to Section 4.
     - If you don’t have a DTS account, the User Activation screen refreshes (Figure 1-3) to provide a self-registration option. Go to step 5.
5. Select **Self Register**. The Self Registration Tool screen opens.

6. Select **Basic Information** on the navigation bar. The Basic Information screen opens.

7. Complete all fields on the screen, then select **SAVE AND PROCEED**. (Note: The CSA/TTR feature is currently not in use.) The Submit Self-Registration screen opens.

8. Select **SUBMIT**. DTS emails the DTA, who will review and either accept or reject your self-registration request. DTS emails the result to you.
   - If accepted, log on again using steps 1-4 above.
   - If rejected, correct the information that caused the DTA to reject the request and resubmit it following the instructions above.

**Note:** The most common reason for rejection is entering the wrong **Organization**. If you enter the wrong organization, your self-registration request gets routed to the wrong DTA, who doesn’t know you, so they will reject the request.
4 Logging Into DTS

Follow the steps listed below to log into DTS:

1. With your CAC into the CAC reader, select Log In in the large blue box near the top of the DTS Home Page (Figure 1-1).

2. Read and Accept the DoD Privacy and Ethics Policy statement.

3. Enter your PIN, then select OK. One of four results is possible:
   • DTS cannot find an account registered under your SSN.
   • DTS finds your account, but it is inactive.
     o If you get either one of the above two results, the User Activation Screen (Figure 1-2) opens. Follow the steps in Section 3.1, starting with step 4.
   • DTS finds an active account registered under your SSN. DTS compares the last name and SSN that are listed on the CAC certificate against the last name and SSN that are listed in the DTS account.
     o If everything matches, DTS sets your User ID, which allows you to log on without checking the last name and SSN again. This status lasts until you reset your User ID. Go to Section 4.1. (For an example of why you might reset your User ID, see Section 7.)
     o If something doesn’t match, DTS displays an error message. Contact your DTA, local help desk, or travel office for assistance.

Example: You have a hyphenated last name – Smith-Jones – which is how you (or the DTA) entered it in DTS when creating your account. Unfortunately, your CAC certificate reflects your last name differently, say with a space between the names or run together (i.e., Smith Jones or SmithJones). To a computer, Smith-Jones is simply not the same as Smith Jones or SmithJones.

If you encounter a problem during this process, try to resolve the problem using the actions listed below.

• Make sure your CAC is seated securely in the CAC reader and remains in place the entire time you are using DTS.

• If you receive an error message, regardless of the type of error message, select OK or Retry Login and begin again.

• If the problem persists, contact your local help desk (for DTS problems) or CAC Office (if for a bad or expired CAC certificate).
4.1 DTS Welcome Screen

When DTS opens, the DTS Welcome screen (Figure 1-4) displays key access information from your personal profile. If you need to update your organization access, group access, or permission levels, contact your DTA.

![DTS Welcome Screen](image)

*Figure 1-4: DTS Welcome Screen*

Navigation is accomplished through the light blue navigation bar and its drop-down menus. Your permission levels and accesses determine which items appear on the navigation bar. For a general description of all possible options, see Section 5. For a more detailed description of some common options that aren’t discussed elsewhere, see Section 6.
The DTS Welcome Screen Navigation Bar

The blue navigation bar on the DTS Welcome screen shows the DTS modules you may access, based on your permission levels (PLs), accesses, and assigned roles. The table on the next page briefly describes the options that are most likely to display, though you likely won’t be able to see them all.

**Note:** You can find further detail about many of the options listed by consulting other DTMO training resources, some of which are listed at the end of this Guide.

<table>
<thead>
<tr>
<th>Menu Bar Item</th>
<th>Drop-Down Item</th>
<th>Description / Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Official Travel</strong></td>
<td>Authorizations/Orders</td>
<td>Provide pre-trip cost estimates. Get permission for TDY travel.</td>
</tr>
<tr>
<td></td>
<td>Vouchers</td>
<td>Request payment of reimbursements &amp; allowances after TDY travel.</td>
</tr>
<tr>
<td></td>
<td>Local Vouchers</td>
<td>As vouchers, but for local travel.</td>
</tr>
<tr>
<td></td>
<td>Group Authorizations/Orders</td>
<td>As authorizations, but for two or more people traveling together.</td>
</tr>
<tr>
<td><strong>Official Travel - Others</strong></td>
<td>Drop-downs, options, and descriptions all as described above. Requires group access to see documents other than your own.</td>
<td></td>
</tr>
<tr>
<td><strong>Traveler Setup</strong></td>
<td>Form Preferences</td>
<td>Set travel documents’ default print format.</td>
</tr>
<tr>
<td></td>
<td>Available Routing Lists</td>
<td>Displays an organization’s routing lists and the people on them.</td>
</tr>
<tr>
<td></td>
<td>Delegate Authority</td>
<td>Routing Officials designate others to sign travel documents for them when they are out of office. Requires PL-2.</td>
</tr>
<tr>
<td></td>
<td>User Preferences</td>
<td>Set travel documents to display times in a 12- or 24-hour format. Turn on or off email notifications from DTS.</td>
</tr>
<tr>
<td></td>
<td>Rate Lookup</td>
<td>See the rates DTS uses to calculate allowances.</td>
</tr>
<tr>
<td></td>
<td>Update Personal Profile</td>
<td>View and edit your DTS profile. Changes apply to documents created after the change.</td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td>Reports Scheduler</td>
<td>Run basic reports on DTS travel documents.</td>
</tr>
<tr>
<td></td>
<td>BI and Reporting Tool</td>
<td>Run advanced reports and build your own reports.</td>
</tr>
<tr>
<td>Menu Bar Item</td>
<td>Drop-Down Item</td>
<td>Description / Use</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administrative</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Displays a variety of DTS tools not directly related to travel documents.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Site Setup Admin</td>
<td>Site Setup Interview</td>
<td>LDTA can create Organizational DTAs (ODTAs), suborganizations, and other resources. Requires PL-6.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Self Registration Admin</td>
<td>DTA can accept new personnel’s self-registration requests and give them PLs and accesses.</td>
</tr>
<tr>
<td></td>
<td>DTA Maintenance Tool</td>
<td>DTA can manage an organization’s resources. Requires PLs-1 and 5.</td>
</tr>
<tr>
<td></td>
<td>Budget</td>
<td>Creates and manages an organization’s budgets. Requires PL-1 to view and PL3 to edit budgets.</td>
</tr>
<tr>
<td></td>
<td>Route and Review</td>
<td>Routing Officials can adjust, review, and sign travel documents. Requires PL-2.</td>
</tr>
<tr>
<td></td>
<td>Calculate Distance</td>
<td>Use the Defense Table of Official Distances (DTOD) to calculate mileage between official locations.</td>
</tr>
<tr>
<td>ROA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Invoices</td>
<td>View (not edit) data in Centrally Billed Account (CBA) invoices.</td>
</tr>
<tr>
<td></td>
<td>Trip</td>
<td>View (not edit) data in DTS travel documents in view-only mode.</td>
</tr>
<tr>
<td>CBA</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>N/A</td>
<td>CBA Specialists can reconcile GTCC vendor invoices against charges made to the organization’s CBA. Requires PL-4.</td>
</tr>
<tr>
<td>DMM</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>DMM Gateway</td>
<td>Debt Management Monitors (DMMs) can monitor collections from travelers with travel-related debt. Requires PL-6.</td>
</tr>
</tbody>
</table>

### 5.1 Traveler Setup Menu

Many of the items available from the DTS Welcome screen navigation bar are well defined elsewhere (e.g., the various DTS Guides do a splendid job of describing the different travel document options). This section describes those items that are available on the **Traveler Setup** menu, but are not adequately described in other training resources.

To access the Traveler Setup drop-down menu (Figure 1-5), on the DTS Welcome screen, mouse over **Traveler Setup** on the navigation bar. Of the functions that appear in Figure 1-5, the following items are described in this Guide:

- Form Preferences
- Available Routing Lists
- User Preferences
- Rates Lookup
- Update Personal Profile
Form Preferences are used to determine how a printed DTS document looks. The table below provides a description of each option available on the Form Preferences screen (Figure 1-6).

![Figure 1-5: Traveler Setup Menu Screen](image1)

![Figure 1-6: Form Defaults Screen (Top)](image2)
### FORM DEFAULT SCREEN OPTIONS

<table>
<thead>
<tr>
<th>Section</th>
<th>Options &amp; Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AUTHORIZATIONS/ORDERS</strong></td>
<td></td>
</tr>
</tbody>
</table>
| Print Full SSN*          | • No masks the first 5 digits of your SSN (XXX-XX-6789).  
                           | • Yes displays your full SSN (123-45-6789).  
| Authorizations           | • Default: Provides more details than the other options. Prints all available travel data without making it look like a DD Form 1610.  
                           | • Govt + Form: Prints a DD Form 1610 showing trip information from DTS onto blank printer paper. Use when you don’t have a blank DD Form 1610.  
                           | • Govt: Prints trip information from DTS onto a blank DD Form 1610 (which you’ve loaded into the printer).  
| Cash Advance             | • Default, Govt + Form, and Govt as described above.  
                           | • None: Do not print a cash advance summary.  
| Group Auth:              | • Summary: Prints the group authorization and a cash advance summary showing the total amount of advanced all travelers received.  
                           | • Summary & Individual: As above, but it also includes the individual authorizations and cash advance totals for each traveler.  
| Itinerary Listing        | Check the box to print your reservations & itinerary.  
| **VOUCHERS**             |                         |
| Print Full SSN*          | As described above.  
| Voucher                  | Options as in “Authorizations” above, except for DD Form 1610, substitute DD Form 1351-2.  
| Receipt Checklist        | Check the box to print a list of receipts that must be attached to the voucher.  
| **ATTACHMENTS**          |                         |
| Document History         | Check the box to print every step in the document’s electronic routing history.  
| Accounting Detail        | Check the box to print the document’s expenses listed by accounting code and category.  
| Privacy Act              | Check the box to print the Privacy Act Statement.  
| **PRINT DOCUMENT NAME**  |                         |
| Block 2 of SF1164        | Do not check this box. *(Note: SF 1164 was replaced by OF 1164 in Dec 2016.)*  
| Block 22 of DD1610       | Check the box to print the document name in block 22 of DD Form 1610.  

*When a DTA with PL-5 prints a DTS document for a traveler, DTS applies the DTA’s Print Full SSN preference settings. If you don’t have PL-5, you can’t print the traveler's full SSN. It is always masked.

### 5.1.2 Available Routing Lists

The Available Routing Lists screen (Figure 1-7) displays all routing lists that belong to an organization. The screen can also display the routing elements on each routing list.

To view an available routing lists and its routing elements:

1. Select an **Organization** from the drop-down list.
2. Select **view** next to a routing list. The screen refreshes to display the **Signatures** section, which shows the routing elements that are assigned to the selected routing list.
5.1.3 User Preferences

Two settings are available on the User Preferences screen (Figure 1-8):

- **Time Format:** When someone accesses a travel document, DTS records the access time and displays it in various places, such as the Document History. You can decide whether DTS displays those times in a 12-hour (AM/PM) format or a 24-hour (military time) format.

- **Email Routing Notification:** Decide whether you want DTS to send you email (check the box) or not (clear the box).

**Note:** We highly recommend you do not turn off email notifications. DTS communicates important information such as document approvals, ticketing, rejections, indebtedness, and much more via email.
5.1.4 Rates Lookup

The Rate Lookup Menu screen (Figure 1-9) provides direct access to five tools:

- **Per Diem Locations**: Look up lodging, meals, and incidental expense rates for locations worldwide.

- **States and Countries**: Look up state abbreviations and country codes. Also provides an indicator about whether the location is officially CONUS or OCONUS.

- **Mileage Rates**: Look up current and historic mileage rates for different vehicle types (e.g., privately owned auto).

- **Government Meal Rate (GMR)**: Look up current and historic GMRs; also includes a breakdown for breakfast, lunch, dinner.

- **Footnotes**: Currently empty.

![Rate Lookup Menu](image)

*Figure 1-9: Rate Lookup Menu*
5.1.5 Update Personal Profile

The Update Personal Profile tool (Figure 1-10) comprises five screens. At any given moment, one screen is open, while access to the other four screens is through links near the top of the screen. Use these screens to update:

- **My Profile:** Your name and contact information, and your emergency contact information.
- **Preferences:** Your preferred travel choices (e.g., favorite airlines and hotels) and rewards program data.
- **Additional Information:** Details about your work: your Service or Agency, unit, work address and phone number. Some details (e.g., rank) you can’t change.
- **Account Information:** Key information about your GTCC and bank accounts.
- **TSA Information:** Information the Transportation Security Administration requires whenever you fly.

![Figure 1-10: Update Profile Tool (Top) – My Profile Screen Open](image)
The above option is available at any time. You can also change your profile when:

- A profile validation launches while logging onto DTS. The validation appears:
  - The first time you log onto DTS.
  - If you haven’t validated your profile in the past 60 days.
  - If your GTCC has expired or is within 30 days of expiration.

- You are working on a DTS travel document (access via the DTS navigation bars).

**Important**: Changes to your personal profile do not affect existing travel documents. To apply profile changes to existing travel documents, you must re-sign the document after you make the change.

### 6 Using Multiple Profiles

If you are a DoD civilian employee and are also a member of the Reserves or National Guard, or if you are located at a Component DTS office, you may need multiple DTS profiles. If you have multiple profiles, the DTS User Welcome screen will display a **Reset Profile** button (Figure 1-11).

If you are using Profile #1 and want to continue using Profile #1 when you come back, log out of DTS without hitting **Reset Profile**. When you log back into DTS, the DTS Welcome screen for Profile #1 automatically displays.

If you need to access a different profile:

1. When you are ready to log out of DTS, select **Reset Profile** to deactivate your current profile (Profile #1 in this example) and log you out of DTS.

2. When you log back into DTS, the system will see that you have no active profile and launch the User Activation Screen (Figure 1-2).

3. To activate, say, Profile #2, enter the SSN associated with Profile #2 twice (and place a check in the **Reserve/National Guard** box if necessary). When you hit Submit, DTS activates Profile #2 and opens the DTS Welcome screen for that profile.
7 Document Lock

When you perform any action that alters a DTS travel document, DTS locks the document to prevent others from creating modifications to it simultaneously. The document lock applies to all travel documents (i.e., authorizations, vouchers, local vouchers, and group authorizations).

Important: You should always use DTS’ blue RETURN TO LIST button or Close Window link to exit a document. Using the browser’s “X” button causes DTS to lock the document for 30 minutes or until a DTA manually unlocks it.

DTS locks travel documents when they are open in an editable mode, including:

- Manual processing, such as:
  - Initial creation
  - Adjustments and amendments
  - Reviews and approvals

- Electronic processing, such as document:
  - Reservation processing by the Travel Management Company (TMC)
  - Document being removed
  - Document being cancelled
  - Reservations in document being auto-cancelled

Documents do not lock during actions that do not include active editing, such as viewing or printing, opening via Read Only Access (ROA) or certain Import/Export (I/E) options, or when interacting with the Payment module.
The following actions all allow a locked document to unlock:

- The person who locked the document:
  - Leaves the document inactive for 30 minutes
  - Closes the document
  - Allows their DTS session to time out
  - Logs off DTS
- A DTA performs an administrative unlock via the **Document Lock Admin** module

DTS provides information regarding documents in a locked status:

1. If you attempt to open a locked document, a popup notifies you who has it locked.

2. If a DTA unlocks the document, you get a popup to let you know.

3. If a DTA unlocks the document, the person who had it locked gets an email to let them know who unlocked it, and to let them know that unsaved changes have been lost.

## 8 Logoff Instructions

Remember to logoff DTS when you are done using it.

1. Generally, to close DTS screens, select **Close** when available. Select the X in the top right corner of the DTS window if a **Close** button is not available.

2. To exit DTS, select **Logoff** on the banner at the top of the DTS Welcome screen.

## 9 Additional Resources

### 9.1 Component Representatives

Your Component Representatives can provide more information on DTS. You can find contact information for Component representatives at [www.defensetravel.dod.mil/site/dtsContacts.cfm](http://www.defensetravel.dod.mil/site/dtsContacts.cfm).

This information is also available by selecting the **Contacts** link on the left side of the DTS Home page.

### 9.2 Helpful References
In addition to providing a wide variety of on-demand and scheduled training, DTMO publishes many useful resources such as Manuals, Guides, and Trifolds that clarify many aspects of official travel, including DTS, DoD travel policies, and Government programs (e.g., Travel Card program, City Pair program). A sampling is provided in the charts on the next two pages. For a complete listing of available resources, check the Training Resource Lookup Tool at: http://www.defensetravel.dod.mil/site/training.cfm.

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</tr>
<tr>
<td>Authorization Instructions Voucher Instructions</td>
<td><a href="http://www.defensetravel.dod.mil/CnstTvl/CT_Voucher_Instructions.pdf">www.defensetravel.dod.mil/CnstTvl/CT_Voucher_Instructions.pdf</a></td>
</tr>
</tbody>
</table>

*Web-based training module is also available in Travel Explorer (TraX) at www.defensetravel.dod.mil/passport*