Defense Travel Management Office

Defense Travel System

DTA Manual, Chapter 12: ROA & ROA Admin

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1 ROA Roles and Administration

As a Read Only Access (ROA) Administrator, you use the DTS ROA Administration module to assign ROA to others or revoke ROA when no longer required.

There are two ROA roles in DTS:

- **ROA User.** A ROA User’s primary responsibility is to access trip and invoice data for one or more organizations to which they have ROA. Trip data comes from the following DTS travel documents: authorizations, vouchers, and local vouchers. Invoice data comes from Centrally Billed Account (CBA) invoices and Government Travel Charge Card (GTCC) vendor (CCV) invoices.

- **ROA Administrator.** ROA administrators may create new ROA Users and Administrators, and adjust their accesses as necessary. They can also access the same trip and invoice data as ROA Users.

**Note:** Although military services appoint their own ROA Administrators, the Defense Travel Management Office (DTMO) is the ROA Administrator for Defense Agencies, Joint Commands, and any military service that requires organization access outside their own service.

2 Using ROA

ROA Users and Administrators access ROA tools through the DTS Dashboard (Figure 12-1). The ROA tools are located from the menu line under Administration, Read-Only Access (ROA).

![Figure 12-1: DTS Dashboard – Maintenance Menu](image)

2.1 View CBA and CCV Invoices

To view CBA or CCV invoices:

1. On the DTS Dashboard (Figure 12-1), select Administration, then ROA Invoices. The
Read Only Access – Invoices Search screen (Figure 12-2) opens.

![Figure 12-2: Read Only Access – Invoices Search Screen](image)

2. Complete the search criteria fields in the top section of the screen. Those marked with an asterisk (*) are mandatory; others are optional.

3. Enter dates or use the calendar icons to limit search results to a specific **CCV Date Range**.

4. Select the **Report Type** you want to run:
   - **Invoice Summary.** Provides information about a CBA or CCV invoice.
   - **Transaction Summary.** Provides high-level information about and summary totals of the transactions that appear on a CBA or CCV invoice.
   - **Transaction Detail.** Provides details about individual transactions that appear on a CBA or CCV invoice.

5. Select the **Invoice Type** (CBA, CCV, or Both) you want to include in the report.

6. Select **Search.** The report format and content depends on the **Report Type** you selected, but opens in an Excel spreadsheet. You can view or save it.

### 2.2 View Trip Data Using ROA

To review a DTS travel document:

1. On the **DTS Dashboard** (Figure 12-1), select **Administration**, then **ROA Trip.** The Read-Only Trip Lookup screen (Figure 12-3) opens. Use this screen to search for the traveler
whose document you want to view.

![Figure 12-3: Read-Only Trip Lookup Screen](image)

2. Select the **SEARCH BY** drop-down menu to identify how to search for the individual:
   - **Name.** Enter a full or partial last (required) and first (optional) name.
   - **TA Number.** Enter the document’s six digit Travel Authorization (TA) Number.
   - **SSN.** Enter the traveler’s Social Security number (SSN).

3. Select **Search.** The **Traveler Lookup Results** screen refreshes with the search results displayed on the bottom (Figure 12-4). If you searched by traveler name, it may display multiple names, but if you searched by TA Number or SSN, the results displays one name.

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

4. Choose **Select** for the traveler whose document you want to review (Figure 12-4).

5. The **Read-Only Trip Lookup** window displays (Figure 12-5).
6. Under **Managing Trips for**: (traveler name), the document types (with totals) defaulting to **Authorizations** first (Figure 12-6). If you need to access a different document type (**Vouchers**, **Local Vouchers**, or **Group Authorizations**), select it (left side) and the document listing (right side) refreshes.

7. Select **View** to access the trip (Figure 12-6). The **Review Trip Authorization** page displays (Figure 12-7). **Note**: DTS displays a message, “This document is view-only” (Figure 12-7, Indicator 1).
8. Use the Progress Bar (left side of the page) to access modules within the document (Figure 12-7, Indicator 2) or use the Go To short cut (Figure 12-7, Indicator 3) to view trip details.

9. You can print the current version within the document on the Review Trip Authorization page. However, there other print choices. From the document listing, select Options. A screen displays the selections (Figure 12-8). Choose your printing preference.

- **Print Authorization.** Prints current version of the document.
- **Manage Adjustments.** View and print original and document adjustments.
  - **Print List.** Prints the stamping history of the document.
  - **Print All Documents.** All document versions print.
3 Administrating ROA

ROA Administrators access the **ROA Administration** through the **DTA Maintenance Tool** following the steps below:

1. From the **DTS Dashboard** (Figure 12-10), hover over **Administration** on the menu bar, then select **DTA Maintenance Tool** from the drop-down list. The **DTA Maintenance Tool Home** screen (Figure 12-11) opens.

2. From the **DTA Tools** bar (which appears on every screen in the **DTA Maintenance Tool**), you can access all the **DTS Maintenance Tool** modules in which you have access, without returning to the **DTS Dashboard**.
3. Select **ROA Administration** from the **DTA Tools** drop-down list (Figure 12-11). The **Search Existing Roa User** screen (Figure 12-12) opens. The **DTA Tools** bar displays **Search Existing Roa User** or **Create New ROA User** options. Below describes how the options work.

**Figure 12-11: DTA Maintenance Tool Home Screen**

**Figure 12-12: Search Existing Roa User Screen**

**3.1 Update ROA Users and Administrators**

Before you can update someone’s ROA profile, you must first locate the person. Here’s how:

1. On the **Search Existing Roa User** screen (Figure 12-12), enter the person’s Social Security Number (**SSN**) or name (at least part of the **Last Name** is required; full or partial **First Name** is optional).

2. Select **Search**. The **Existing ROA User (Search Results)** screen (Figure 12-13) opens. Your options are **Update** and **Remove** the person’s ROA profile.
3.1.1 Update a Person’s ROA

1. On the Existing ROA User (Search Results) screen (Figure 12-13), select Update next to the person’s profile you need to change. The Update ROA User (User Only) screen (Figure 12-14) opens.

2. The User Access field displays the person’s assigned ROA role. Change it if you need to or keep the current access.

3. If you need to update the organizations that the person has access to, then choose Select Organizations. The Edit ROA User Organization Access screen opens (Figure 12-15) opens. (If you don’t need to do this, skip ahead to step 6).
4. Update the **Selected Organization** List.
   
   a. Enter the name of an organization the individual needs ROA in the text field on the left, then select **Add >>**. The organization appears in the right column. Repeat adding all the organizations the person needs. **Note:** Giving a person ROA to an organization also gives that person ROA to all of its subordinate organizations.
   
   b. To remove ROA, select an organization in the right column and select **< Remove**.

5. Select **Save and Continue**. The **Update ROA User (User Only)** screen (Figure 12-14) opens.

6. Select **Save Changes**. The **Existing ROA User (Search Results)** screen (Figure 12-13) appears.

### 3.1.2 Remove a Person’s ROA

**Note:** Removing a person’s ROA only deletes the person’s ROA profile. It does not delete the person’s DTS profile.

To remove a person’s ROA:
1. On the **Existing ROA User (Search Results)** screen (Figure 12-16), select **Remove** next to the person whose ROA profile you need to delete.

![Figure 12-16: Existing ROA User (Search Results) Screen](image)

2. The **Delete Roa User** screen (Figure 12-17) opens.

![Figure 12-17: Delete Roa User Screen](image)

3. Select **Delete**. The **Existing ROA User (Search Results)** screen (Figure 12-18) opens. DTS removes the person’s from ROA.

![Figure 12-18: Existing ROA User (Search Results) Screen](image)

### 3.2 Give a Person ROA
To give a person ROA:

1. From any screen in the **ROA Administration** module, select **Create New Roa User** on the dark blue navigation bar. The **Search New Roa User** screen opens (Figure 12-19) opens.

![Search New Roa User Screen](image1)

*Figure 12-19: Search New Roa User Screen*

2. Enter the person’s Social Security Number (**SSN**) or name (at least part of the **Last Name** is required, full or partial **First Name** is optional).

3. Select **Search**. The **New ROA User (Search Results)** screen (Figure 12-20) opens. A listing of people who matched your search criteria displays.

![New ROA User (Search Results) Screen](image2)

*Figure 12-20: New ROA User (Search Results) Screen*

4. Select **Create** next to the person you want to give the ROA capability. The **Create Roa User (User Only)** screen (Figure 12-21) opens.
5. (optional) The User Access field displays User by default. You are assigning this ROA role this person. Change it to Administrator if you need to or leave User.

6. Choose Select Organizations. The Edit ROA User Organization Access screen (Figure 12-22) opens.

7. Update the Selected Organization List.
   
   a. Enter the name of an organization to grant ROA in the text field on the left, then select Add >>. The organization appears in the right column. Repeat until you’ve
added all the organizations for the person. **Note:** Giving a person ROA to an organization also gives that person ROA to all of its subordinate organizations.

b. To remove ROA, select an organization in the right column and select << Remove.  

8. Select **Save and Continue.** The **Create Roa User (User Only)** screen (Figure 12-21) opens.  

9. Select **Save User.** The **New ROA User (Search Results)** screen (Figure 12-20) opens. The person you just updated is no longer on the listing.  

10. Select **Search Existing ROA User** (Figure 12-19). Enter the SSN or the last name and **Search.** The **Existing ROA User (Search Results)** (Figure 12-18) displays the newly added person to ROA. 

### 4 The DTA Manual: Contents & Links

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