

Defense Travel System

DTA Manual, Chapter 5: Routing Lists

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Revision History

Revision No.	Date	Authorization	Revision/Change Description	Page, Section
1.0	04/25/18	Defense Travel Management Office (DTMO)	Change format, updated language & screenshots	All
1.1	06/22/18	DTMO	Updated URLs to “https” vs. “http”	Throughout
1.2	08/17/18	DTMO	Changed DTA Maintenance Tool access through DTS dashboard	Section 4
1.3	08/12/19	DTMO	Updated term Route and Review to Trips Awaiting Action	Page 8
1.4	02/24/20	DTMO	Updated Certifying Official description	Page 9

1 Introduction to DTS Routing Lists

In DTS, a routing list establishes the path for electronic processing of travel documents. It identifies the entities (aka, *routing elements*) who need to see the document to conduct reviews, certify funds, approve travel or payments, and much more. The routing list also identifies the order in which the routing elements receive the documents, and the DTS status stamp each must apply to move it to the next step in the process.

As a Defense Travel Administrator (DTA), you may need to create routing lists and adjust them as your organization changes. You can also assign a default routing list to traveler profiles, to help ensure that each traveler* uses the routing list that gets their travel documents to the right people.

Note: When this chapter mentions actions a traveler takes, generally speaking, anyone with access to the traveler's documents may perform the same actions.

1.1 The Default Routing List

Each organization must have at least one routing list – the *default routing list*. DTS requires you to name the default routing list when creating the organization, even though routing list is empty. You must populate it before you can use the routing list for document processing. When you add the routing stamps, you should ensure that it is set up to handle all document types (see section 2.1).

You may update or replace the default routing list at any time, but you can never delete a routing list while it is the organizations default routing list.

New travelers who join the organization automatically use the organization's default routing list as their own default routing list, unless you change it (see below).

1.2 Additional Routing Lists

By creating more than one routing list, you can easily tailor the routing process supporting each organization's needs. Each organization can have its own default routing list, for example, or you can have different routing lists for different sorts of travel (e.g., travel for training, medical travel, or funeral detail travel).

Once you have additional routing lists, you may replace the default routing list in a traveler's personal profile. Doing so overrides the organization default routing list for that traveler, so whenever that traveler creates a travel document, it will initially contain the default routing list shown in their profile.

1.3 Using Routing Lists in a DTS Document

Every traveler's DTS profile contains a default routing list. Initially, this routing list is the same as the organization's default routing list. However, if a traveler requires a different routing list consistently, you can use the DTA Maintenance Tool's People module to update the traveler's default routing list in their DTS profile. For more information on using the People module to update personal profiles in DTS, see the *DTA Manual, Chapter 7*.

When a traveler creates a travel document in DTS, the system automatically attaches the traveler's default routing list to it. Even so, a traveler can elect to use a different routing list on any travel document, simply by selecting it.

When the traveler submits the document as **SIGNED**, the document follows the attached routing list. To change the routing list or to alter the steps on the attached routing list after the document has started routing, someone must re-sign the document. This creates an adjustment forcing the routing process to re-start using the new or updated routing list.

2 Routing Elements

A routing list contains a series of *routing elements*. Each routing element defines a person or computer system that must interact with the document. You must define the following information for each routing element:

- Document Type
- Document Status
- Signature Name
- Level
- Process Name*

2.1 Document Type

Indicates which travel documents – authorizations (includes group authorizations), vouchers, or local vouchers – will route to the routing element. Each routing element can only include one document type, so if one routing list will handle all three document types, it must contain steps for each document type. See Table 5-1 for an example.

2.2 Document status

This indicates the status stamp DTS will apply when the step is complete. See section 2.6.1 of this chapter for an explanation of the most common document statuses and those who apply them.

Note: DTS generally uses the terms, *document status*, *stamp*, and *status stamp* interchangeably.

2.3 Signature name

The name of the Routing Official (i.e., AO, CO, or RO) who applies the stamp.

2.4 Level

The level indicates the order in which the routing element receives the document. It thus determines the order in which the stamps appear on the document. For the most part, that order is up to you. The only exceptions are:

- **CTO SUBMIT** and **CTO BOOKED**, when used, must be the first stamps on the routing list, and must be at levels 2 and 3 respectively.
- **APPROVED** must be the highest level on the routing list for each document type. The level number is up to you, though it cannot exceed 30.

Notes:

1. Although DTS lists the level numbers in sequence, the numbers do not have to be consecutive. In fact, it's best to leave gaps between numbers to allow you to add an additional Routing Official later without having to renumber all the levels below the new one.
2. Future routing list maintenance will be easier if you assign the same level number to the same Routing Official in every routing list. For example, ROs are always at step 5, COs at step 10 and AOs at step 20.
3. To prevent routing stopping should a Routing Official be unavailable, best practice is to always put multiple personnel at the same level (3 AOs at level 25, for instance).
4. A routing list can only have a single document status at a level. That is, you can't have both **REVIEWED** and **APPROVED** at level 15.

2.5 Process name (for Conditional Routing)*

The **Process Name** indicates that *conditional routing* is in effect. It means that if the named condition does not exist, DTS skips that step on the routing list. For example, if you select the **Process Name** *Foreign Travel*, DTS looks for OCONUS destinations. If the document has no OCONUS locations, the document skips the step. This prevents your organization's foreign travel expert (in this example) from having to review documents that do not contain foreign travel.

Conditional routing can appear on any travel document, but is optional for an organization.

See sections 4.2.1.2 through 4.2.1.4 in this chapter and the *DTA Manual, Appendix K* for more information on conditional routing.

2.6 Routing Officials

Routing Officials must have permission levels 0 and 2 to access DTS and **Trips Awaiting Action**. Permission level 2 allows an individual to change the stamp assigned to them by the routing list, so that they can use the **SIGNED**, **RETURNED**, and **CANCELLED** stamps as appropriate. **Note:** If you are a Routing Official and stamp a document **SIGNED** for a traveler, DTS will not allow you to stamp the document with your designated routing list stamp as well such as **REVIEWED** or **APPROVED**. Another Routing Official would need to take document review action.

A routing list may contain one or more Routing Officials who belong to an organization outside your hierarchy. To add a Routing Official who belongs to an external organization to a routing list, you must have the individual's full SSN (see section 4.2.1.1).

2.6.1 Most Common Routing Officials

Although others are possible, the most common routing officials on a routing list are:

- **Authorizing Official (AO).** The AO applies the **APPROVED** stamp to documents to allow the trip to proceed (authorizations) or the requested payment to be paid (vouchers). The AO is the only mandatory Routing Official on a routing list and must always be the last step for all document types. Never use conditional routing on levels that include an AO, as they must see every document.
- **Reviewing Official (RO).** The RO applies the **REVIEWED** stamp* to documents that they have reviewed them and found no errors. They have no fixed responsibilities at the DoD level; the organization determines their specific duties. **Note:** When the RO is on the routing list level that uses conditional routing, you may assign them the **REVIEWED1**, **REVIEWED2**, or **REVIEWED3** stamp instead.

- **Certifying Official (CO).** The CO applies the **CERTIFIED** stamp to verify that enough money remains in the organization's travel fund to pay for a trip.

All Routing Officials must complete required training and be appointed in writing (DD Form 577) to serve in this role.

When a document routes to any Routing Official, DTS sends that Routing Official an email to let them know. If multiple Routing Officials are at the same level (which is a recommended practice), they all receive the same email. When any of those Routing Officials stamps the document, DTS removes the document from the other Routing Officials' queues, but does not send an email.

2.6.2 Delegate Signature Authority

Typically, a routing list contains multiple individuals for each stamp such as **APPROVED** to manage document review actions. However, Routing Officials who will be unavailable to review documents for an extended period can temporarily assign another Routing Official (not listed on the routing list) to review documents for them during their absence. The Routing Official *delegates signature authority* using the **Delegate Authority** function. Once in place, DTS emails the temporary official when a document needs their attention. Then the temporary official completes the review (i.e., stamps the document), DTS removes the document from other Routing Official's queues for that level and moves the document to the next level.

DTS allows a Routing Official to delegate their signature authority to an individual with permission level 2 and within the same organization of assignment. The transfer remains in place until the person who delegated it removes it. A Routing Official should only delegate their signature authority to knowledgeable and properly appointed individual. Once the Routing Official returns, he or she should remove the *delegated signature authority* and resume their duties.

2.7 Stamps, Status Codes, and Action Codes

As mentioned above, DTS uses the terms *stamp* and *status code* interchangeably. The stamp used when signing a document becomes the current status code of the document. DTS uses status codes to:

- Indicate the steps of the electronic approval process
- Indicate system-generated actions
- 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 codes assigned to it. Each action code causes a specific electronic procedure to occur. Action codes initiate

actions such as *route* (sends the document to the Routing Officials at the next level of the routing list) and *emailtrav* (sends an email to the traveler).

There are more than 20 action codes associated with the various types of documents. The list of stamps and the action codes assigned to each stamp is preset. See the *DTA Manual, Appendix K* for a complete list of status codes and descriptions.

2.8 Minimum Routing List Requirements

The minimum status codes for a routing list that contains authorization steps are:

- **CTO SUBMIT (Level 2)**. Routes an authorization to the TMC if the traveler used the DTS Travel module to make travel arrangements.
- **CTO BOOKED (Level 3)**. Indicates that the TMC has quality controlled the reservation requests or made travel arrangements for the traveler.
- **APPROVED**. Must always be at the highest level (i.e., it's the last step).

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

3 Organization Chart and Routing List Example

Figure 5-1 shows a sample organization chart with several routing lists. Each organization has a default routing list and at least one alternate routing list. The organization that owns a routing list is responsible for its maintenance. Table 5-1 shows a sample routing list with key points called out.

Note: The organization naming structure for services and agencies in this manual are for training purposes only and are subject to change. The *DTA Manual, Appendix Q* provides the current version for each service and agency.

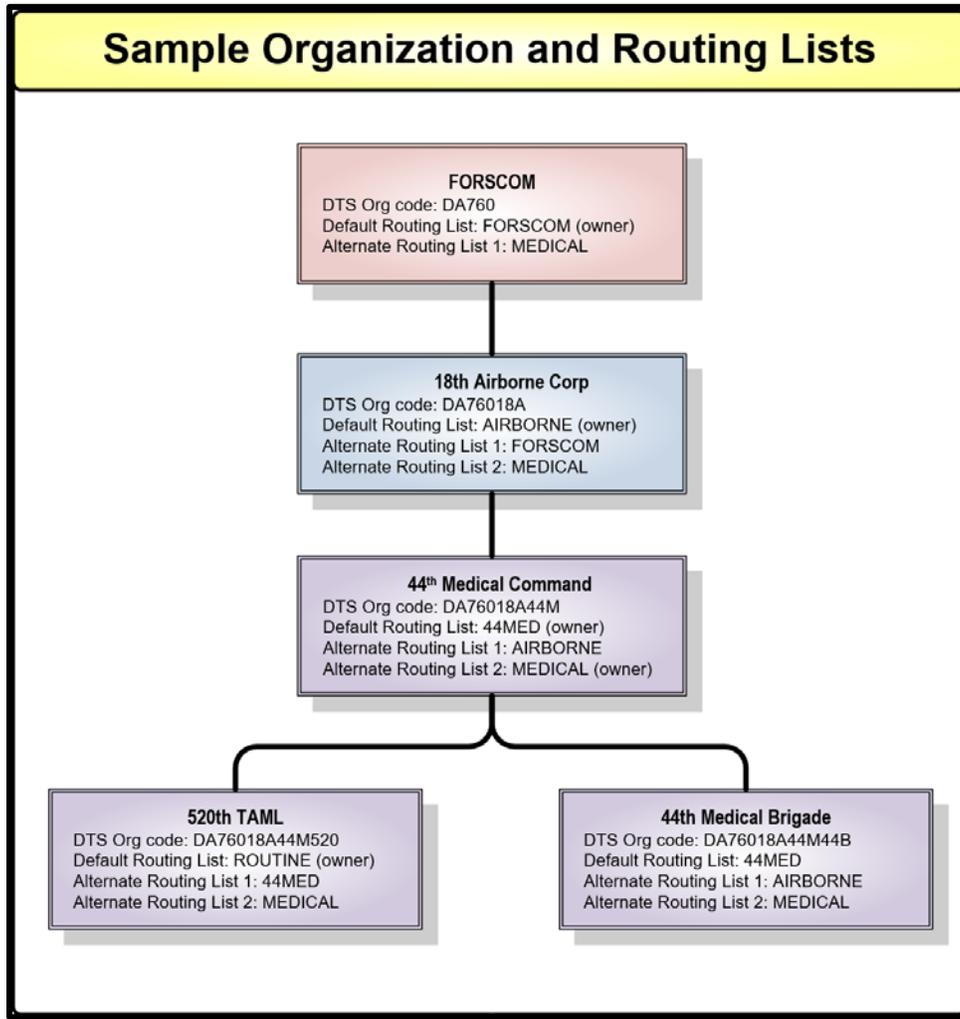


Figure 5-1: Sample Organization Chart

Table 5-1

SAMPLE ROUTING LIST				
Doc Type	Doc Status	Signature Name	Level	Process Name
AUTH ¹	CTO SUBMIT	**CTO SUBMIT	3	BYPASS PNR* ⁵
AUTH	CTO BOOKED	**CTO BOOKED	4	BYPASS PNR* ⁵
AUTH	REVIEWED	Shelly Smith ²	10	
AUTH	REVIEWED	Sidney Carson ²	10 ³	
AUTH	APPROVED	Chris West	20 ³	
AUTH	APPROVED ⁴	Caroline Cruz	20	
LCVH ¹	REVIEWED	Shelly Smith	10	
LCVH	REVIEWED	Sidney Carson	10	
LCVH	APPROVED	Chris West	20	
LCVH	APPROVED ⁴	Caroline Cruz	20	
VCH ¹	REVIEWED	Shelly Smith	10	
VCH	REVIEWED	Sidney Carson	10	
VCH	APPROVED	Chris West	20	
VCH	APPROVED ⁴	Caroline Cruz	20	

Notes on sample routing list:

1. Includes all three document types.
2. Includes backup Routing Officials at each level.
3. Level numbers have gaps.
4. **APPROVED** is highest level for each document type.
5. Only conditional routing used is **BYPASS PNR** for TMC steps. Levels with no Process Name are not conditional routing.

4 Working with Routing Lists in DTS

In DTS to manage and maintain the organization resources, use the **DTA Maintenance Tool**. You use the **Routing Lists** module to create, search and locate, update, copy, and delete routing lists. The remaining sections of this chapter discuss all these options.

From **DTS Dashboard**, select the **Administration** menu, and then the **DTA Maintenance Tool** (Figure 5-2).

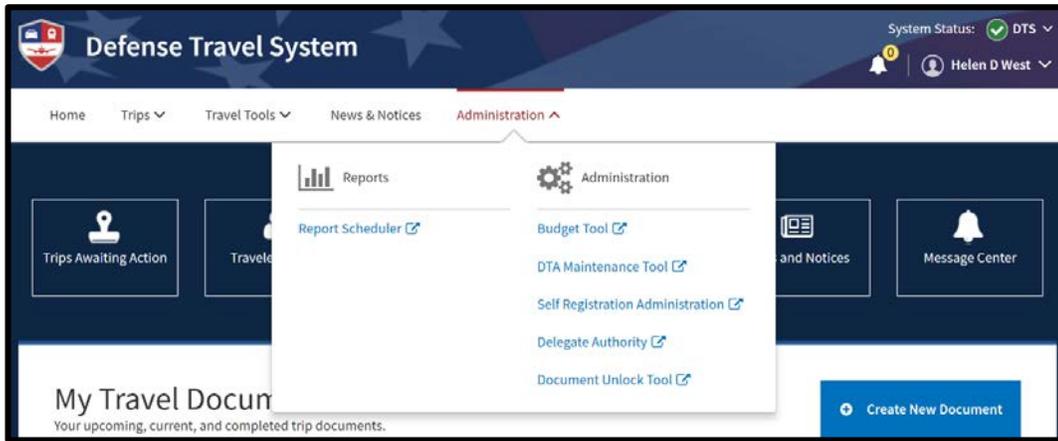


Figure 5-2: DTS Dashboard – Administration Menu

The **DTA Maintenance Tool Home Page** (Figure 5-3) opens. **Note:** You can move to different modules within **DTA Maintenance Tool** without returning to the **DTS Dashboard** as long as you have the proper permissions. Simply use drop-down menu in **DTA Tools** and switch to another module.

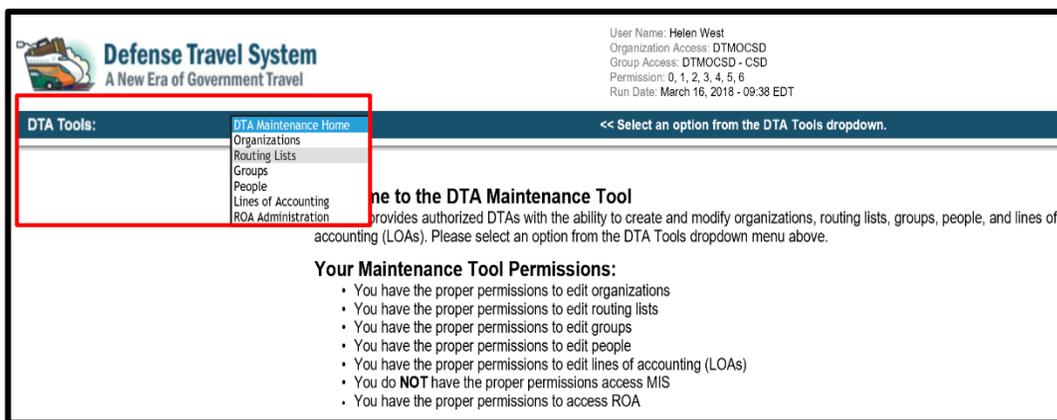


Figure 5-3: DTA Maintenance Tool Home Page

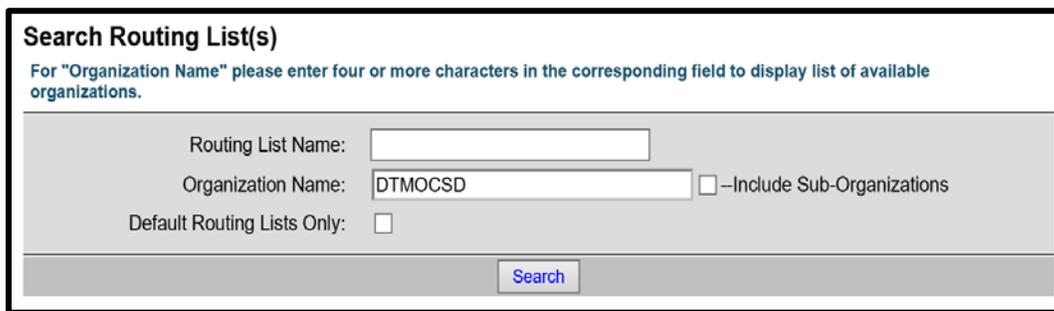
Select **Routing Lists** from the **DTA Tools** drop-down list. The **Search Routing List(s)** screen (Figure 5-4) opens and the **DTA Tools** bar updates to display tools for:

- Search for a routing list.
- Create a routing list from scratch.
- Create a report that shows you the routing lists an organization owns.
- Create a report that shows you which Routing Officials delegated signature authority, and to whom.

Below describes each of these options.

4.1 Search for a Routing List

Before you can update a routing list's data or delete a routing list, you must find it. To help you do that, the **Search Routing List(s)** screen (Figure 5-4) automatically opens when you open the **Routing List** module. You can also access this screen from any screen in the **Organizations** module by selecting **Search Routing List(s)** in the **DTA Tools** bar.



Search Routing List(s)
For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Routing List Name:

Organization Name: --Include Sub-Organizations

Default Routing Lists Only:

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

To search for an organization:

1. (optional) Enter one or more letters of the **Routing List Name** to limit your search to routing lists that start with those letters.
2. (optional) Your main organization's name appears by default in the **Organization Name** text field. Change it if you need to search for routing lists owned by a different organization.
3. (optional) If you want to view routing lists owned by organizations subordinate to the one in the **Organization Name** field, check the **Include Sub-Organizations** box.
4. Select **Search**. The screen updates to display your search results (Figure 5-5).

Routing List(s) (Search Results)						
Routing List Name:				Organization Name: DTMOCSD		
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	DTMOCSD	CSD	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	EWTS TRAINING	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	Training	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD460FM	MM	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDOPS	DEFAULT	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDTRAINING	RL1	Yes
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 5-5: Routing List(s) (Search Results) Screen

See Table 5-2 for a list of the **Routing List(s) (Search Results)** screen field, column, and object names and their descriptions.

Table 5-2

ROUTING LIST(S) (SEARCH RESULTS) SCREEN DESCRIPTION	
Field or Object	Description
Text items at the top of the screen (e.g., Default Routing Lists Only)	Identify the search criteria you entered on the Search Routing List(s) screen. Displays red text if you used the field in your search, or left blank if you did not.
Select to Globally Update	When you need to make the same change to multiple routing lists, check the box next to each organization you need to change. These boxes work with the Globally Update buttons (also listed in gray on this table) at the bottom of the screen.
Individually Edit	Column containing buttons that let you Update , Copy , or Delete a single routing list.
Organization Name	Column that displays the organizations that own the displayed routing lists.
Routing List Name	Column that shows the routing lists that match your search criteria.
Default Routing List	Column that identifies whether the routing list is an organization's default routing list.
Globally Update Selected Routing Lists (on this page)	Row containing three buttons. When you check at least one box in the Select to Globally Update column (also listed in gray on this table), these buttons let you Add , Remove , or Replace a routing element in all the checked routing lists at the same time.

4.2 Update a Single Routing List

When you create a routing list, it contains no routing elements. You must add routing elements before a traveler can use the routing list for document processing. You have many options when updating a routing list. This section discusses the most commonly used options.

4.2.1 Add a Routing Element (Typical Routing List Set-Up)

To add a routing element to a routing list, begin on the **Routing List(s) (Search Results)** screen (Figure 5-5). The steps listed below apply whether you are populating a new routing list from scratch or adding a new routing element to a routing list that already contains routing elements.

1. Select **Update** to open the routing list. The **Update Routing List** screen opens (Figure 5-6).

Figure 5-6: Update Routing List Screen – New Routing List

- (optional) Select **Populate CTO Stamps** to add the CTO Submit and CTO Booked stamps at Levels 2 and 3, with all fields filled in. **Note:** After you add the CTO stamps, DTS removes the **Populate CTO Stamps** option, as seen in Figure 5-7.

Update Routing List

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

Organization Name: **DTMOCSDOPS**

Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR

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

Figure 5-7: Update Routing List Screen – CTO Stamps Added

- Select **Add Routing Element** to add a new routing element. The **Add Routing Element** screen (Figure 5-8) opens.

Add Routing Element * Required

Routing List Name: **DEFAULT**

Organization Name: **DTMOCSDOPS**

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.

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

Figure 5-8: Add Routing Element Screen

- Select a **Document Type**.
- Select a **Document Status**.
- Select **Search** to locate a **Signature Name**. The **Search People** screen (Figure 5-9) opens. **Note:** If the routing official belongs to an organization you do not have access to, use the **Xorg Search** option instead. See section 4.2.1.1.

Figure 5-9: Search People Screen

7. Enter the **Organization Name** to search for the RO. If you're unsure which organization the person belongs to, then keep the field displaying your main organization access and select **Include Sub-Organizations** to search your entire hierarchy.
8. Enter the person's Social Security number (SSN) or all or part of their last name (first name (full or partial) is optional).
9. Select **Search**. The **Search People Results** screen (Figure 5-10) opens. It displays key information about everyone who met your search criteria.

Select Person	Name	SSN	Organization
Select	West, Chris A	XXXXX9741	DTMOCSD
Select	West, Eric T	XXXXX9743	DTMOCSD
Select	West, Helen D	XXXXX9740	DTMOCSD
Select	West, Molly T	XXXXX9742	DTMOCSD

Figure 5-10: Search People Results Screen

10. Choose **Select** next to the name of the Routing Official you need to add to the routing list. The **Search People Results** screen closes and the **Add Routing Element** screen re-opens with the **Signature Name** field populated.

Figure 5-11: Add Routing Element Screen

11. Enter the **Level** number.
12. Leave the **Process Name** field blank. **Note:** If you are entering a conditional routing element, you will select a **Process Name** – see sections 4.2.1.2. to 4.2.1.4.
13. Select **Add Routing Element**.
14. Repeat steps 3 through 13 as many times as necessary to add all additional routing elements. You can add as many routing elements as you need.
15. Select **Save Changes**. **Note:** DTS won't let you save your changes until you enter **APPROVED** for a **Document Status** for at least one **Document Type**.

Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	REVIEWED	Molly T West	15	
Update Remove	Authorization	REVIEWED	Eric T West	15	
Update Remove	Authorization	APPROVED	Helen D West	25	
Update Remove	Authorization	APPROVED	Chris A West	25	
Update Remove	Local Voucher	APPROVED	Helen D West	25	
Update Remove	Local Voucher	APPROVED	Chris A West	25	
Update Remove	Voucher	APPROVED	Helen D West	25	
Update Remove	Voucher	APPROVED	Chris A West	25	

Figure 5-12: Update Routing List Screen

16. The **Routing Lists(s) (Search Results)** page re-opens (Figure 5-13).

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	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCS	EWTS TRAINING	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCS	Training	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCS460FM	MM	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSOPS	DEFAULT	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSTRAINING	RL1	Yes

[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 5-13: Routing List(s) (Search Results) Screen

17. Select **Update** next to the routing list you just modified to view the elements you added for the **Organization Name (DTMOCSOPS)** with **Routing List Name (DEFAULT)**.

4.2.1.1 Add a Routing Official From Outside the Organization

If you need to add a routing official from an external organization to a routing list, use the steps in section 4.2.1, but replace steps 6-10 with the following:

1. Select **Xorg Search** (as seen in Figure 5-11) to locate a **Signature Name**. The **Search People** screen (Figure 5-14) opens.

Search People	
SSN: *	<input type="text"/>
<input type="button" value="Search"/> <input type="button" value="Close Window"/>	

Figure 5-14: Search People Screen (Xorg Search)

2. Enter the person's **SSN**.
3. Select **Search**. The **Search People Results** screen (Figure 5-15) opens. It identifies the person you searched for in DTS.

Search People Results			
SSN: 999971590			
Select Person	Name	SSN	Organization
Select	DODD, TOM H	999971590	DTMOTCP180017
1 - 1 of 1			
Back to People Search		Close Window	

Figure 5-15: Search People Results Screen

4. Choose **Select**. The **Search People Results** screen closes and the **Add Routing Element** screen re-opens with the **Signature Name** field populated.
5. Be sure to select **Save Changes**.

4.2.1.2 Add a Conditional Routing Official (General)

When you enter a process name, DTS checks all documents that use that routing list to see if certain conditions exist (see Table 5-3). If the condition exists, DTS routes the document to the designated RO. If the condition does not exist, DTS skips that RO and goes directly to the next routing element.

Table 5-3

PROCESS NAME OPTIONS	
Process Name	Check for Condition
BYPASS PNR	Checks for reservations in an authorization. If no reservations exist, the document skips TMC processing.
FOREIGN TRAVEL	Checks for travel from a CONUS location to any OCONUS location. OCONUS locations include non-foreign OCONUS locations, such as Alaska or Guam.
OCONUS/CONUS	Checks for travel from an OCONUS location to a CONUS location. OCONUS locations include non-foreign OCONUS locations, such as Alaska or Guam.
OCONUS/OCONUS	Checks for travel from an OCONUS location to a different OCONUS location. Include non-foreign OCONUS locations, such as Alaska or Guam.
PREMIUM CLASS FARE	Checks for non-economy/coach class fares such as business or first class.
TRAVEL MODE ROUTE*	Checks the selected transportation mode.
TRAVELER NUMBER	Checks the number of travelers in a group authorization. If the number is 10 or more, the document routes to a Transportation Officer (TO).
LEAVE REQUESTED	Checks for an annual leave or non-duty status. This option is available for vouchers only.
*Note: This process names include unique variations in the set-up process, covered elsewhere in this chapter. Travel Mode is in section 4.2.1.4.	

If you need to add a conditional routing official to a routing list, use the steps in section 4.2.1, but replace step 12 with the following:

1. Select a **Process Name** (Figure 5-16). **Note:** Certain options do not appear for all document types.

Figure 5-16: Update Routing Element Screen - Process Names

Note: To help distinguish conditional routing elements, instead of assigning the **REVIEWED** stamp as you would for an ordinary RO, consider assigning the **REVIEWED1**, **REVIEWED2**, or **REVIEWED3** stamp for a conditional RO.

Figure 5-17 shows a **Process Name** on a completed routing list. In this example, DTS will route documents that contain travel to OCONUS locations to Molly West for review. If a document contains no OCONUS locations, the document will skip Molly and go straight to the AOs for approval action.

Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	REVIEWED1	Molly T West	20	FOREIGN TRAVEL
Update Remove	Authorization	APPROVED	Helen D West	25	
Update Remove	Authorization	APPROVED	Eric T Linden	25	
Update Remove	Local Voucher	APPROVED	Helen D West	25	
Update Remove	Local Voucher	APPROVED	Chris A Plummer	25	
Update Remove	Voucher	APPROVED	Helen D West	25	
Update Remove	Voucher	APPROVED	Chris A Plummer	25	

Figure 5-17: Sample Routing List with a Conditional Element

4.2.1.3 Add a Conditional Routing Official for Travel Mode

Your local business rules may require a specific RO to review a travel document if the traveler selected a particular transportation mode. For instance, if traveler selected a transportation mode reimbursable by a Centrally Billed Account (CBA), you may want someone familiar with CBAs to review the document. To handle those situations, DTS allows you to select conditional routing options based on the “travel mode”.

To use conditional routing for travel mode, follow the steps as described in section 4.2.1.2 with an additional step. When you select **TRAVEL MODE ROUTE** as the **Process Name**, the screen expands to display a list of transportation types (Figure 5-18).

The screenshot shows the 'Add Routing Element' screen with the following details:

- Document Type:** Authorization
- Document Status:** REVIEWED2
- Signature Name:** Molly T West
- Level:** 25
- Process Name:** TRAVEL MODE ROUTE
- Travel Mode(s):** A grid of checkboxes for various codes: CA, CB, CB-C, CF, CF-C, CF-I, CP, CP-C, CR, CR-C, CV, GA, GB, GP, GV, PA, PM, PP, PV, TB, TP, TR, TV.

Figure 5-18: Add Routing Element Screen - Travel Mode Check Boxes

Table 5-4 explains the **Travel Mode** codes.

Table 5-4

TRAVEL MODE CODES	
Mode	Description
CA	Commercial Auto TDY/TAD
CB	Commercial Bus
CB-C	Commercial Bus (CBA)
CF	TMC Fee (IBA)
CF-I	TMC Fee (IBA)
CF-C	TMC Fee (CBA)
CP	Commercial Plane
CP-C	Commercial Plane (CBA)

CR	Commercial Rail (IBA)
CR-C	Commercial Rail (CBA)
CV	Commercial Vessel
GA	Government Auto
GB	Government Bus
GP	Government Plane
GV	Government Vessel
PA	Private Auto TDY/TAD
PM	Private Motorcycle TDY/TAD
PP	Private Plane
PV	Private Vessel
TB	Prepaid Bus
TP	Prepaid Plane
TR	Prepaid Rail
TV	Prepaid Vessel

Check the boxes next to all the travel modes that you want this RO to specifically review. Steps 13 (select **Add Routing Element**) through 15 (select **Save Changes**) remain unchanged.

4.2.2 Update a Routing Element

To update a routing element, begin on the **Routing List(s) (Search Results)** screen (Figure 5-5).

1. Select **Update** next to the routing list you want to change. The **Update Routing List** screen (Figure 5-19) opens.

Update Routing List

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

Organization Name: **DTMOCSDOPS**

Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	REVIEWED1	Molly T West	20	FOREIGN TRAVEL
Update Remove	Authorization	APPROVED	Helen D West	25	
Update Remove	Authorization	APPROVED	Chris A West	25	
Update Remove	Local Voucher	APPROVED	Helen D West	25	
Update Remove	Local Voucher	APPROVED	Chris A West	25	
Update Remove	Voucher	APPROVED	Helen D West	25	
Update Remove	Voucher	APPROVED	Chris A West	25	

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

Figure 5-19: Update Routing List Screen

2. Select **Update** next to the element you want to change. The **Update Routing Element** screen (Figure 5-20) displays the details of the routing element you selected.

Figure 5-20: Update Routing Element Screen

3. Make all necessary changes.
4. Select **Update Routing Element**. The **Update Routing List** screen (Figure 5-19) opens, displaying your changes.
5. Select **Save Changes**. The **Routing List(s) (Search Results)** screen opens. You can check the changes by selecting **Update** next to the routing list you modified.

4.2.3 Remove a Routing Element

To remove a routing element, begin on the **Routing List(s) (Search Results)** screen (Figure 5-5).

1. Select **Update** to open the routing list. The **Update Routing List** screen (Figure 5-19) opens.
2. Select **Remove** next to the routing element you want to delete. The screen refreshes and no longer displays the removed element.
3. Select **Save Changes**. The **Routing List(s) (Search Results)** screen opens. You can verify the changes by selecting **Update** next to the routing list you changed.

4.3 Copy a Routing List

Copy lets you duplicate information on one routing list to create a new routing list that contains all routing elements exactly as they appeared in the source routing list. Even if the new routing list will require a few changes to those routing elements, copying can be a huge time saver, as you won't have to enter all the routing elements one at a time.

When you create a new routing list in this way, you can also use it to replace the organization's current default routing list. To copy a routing list:

1. Beginning on the **Routing List(s) (Search Results)** screen (Figure 5-5), select **Copy** next to the routing list you want to duplicate. The **Copy Routing List** screen (Figure 5-21) opens.

Figure 5-21: Copy Routing List Screen

2. An organization cannot have two routing lists with the same name, so you must enter a **New Routing List Name**, a new **Organization Name**, or both.
3. Select **Yes** if you want to make the new routing list the default routing list for the destination organization. Leave **No** selected if you don't want to establish a new default routing list.
4. Select **Copy Routing List**. The **Routing List(s) Search Results** screen (Figure 5-5) opens to display the new routing list.

Note: If you need to make any changes to those routing elements, follow the instructions in the previous sections to add, change, or remove routing elements.

4.4 Delete a Routing List

If you no longer need a routing list, the process to delete it is straightforward; however, you cannot delete a routing list if it is:

- Designated as the default routing list for an organization.
- Designated in a person's DTS profile as their default routing list.

To delete the organization, starting on the **Routing List(s) (Search Results)** screen (Figure 5-5).

1. Select **Delete** next to the routing list you want to remove. The **Delete Routing List** screen opens (Figure 5-33).

Figure 5-22: Delete Routing List Screen

2. Select **Delete Routing List**. The **Routing List(s) Search Results** screen (Figure 5-5) opens. The deleted routing list is not on it. However, if you cannot remove the routing list, a **Domain Error** message (Figure 5-23) displays to explain the situation.

Figure 5-23: Delete Routing List Screen With Error Message

4.5 Create a Routing List

To create a new routing list from scratch:

1. Select the **Create Routing List(s)** link on the **DTA Tools** bar from the top of any page in the **Routing Lists** Module. The **Create Routing List** screen (Figure 5-24) opens.

Figure 5-24: Create Routing List Screen

2. Enter the **Routing List Name** (up to 16 alpha/numeric characters). The name must be unique, as you can't enter a duplicate routing list name in the same organization. **Note:** Recommend not using special characters such as (*!#-) when naming a routing list.
3. Enter the **Organization Name**. Your main organization's name appears by default, but you can change it if another organization will own this routing list.
4. Select **Yes** or **No** indicating if the new routing list will be the organization's default routing list.
5. Select **Save Routing List**. The **Routing List(s) (Search Results)** screen opens to display this routing list only.

Note: When you create a new routing list, it contains no routing elements. You must follow the steps listed in section 4.2 to add them before a travel can use the routing list.

4.6 Update Multiple Routing Lists

DTS' term for adjusting routing elements on multiple routing lists at the same time is *Global maintenance*. To use global maintenance, you must first search for all the routing lists you need to include in the update. Global maintenance begins 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.

Routing List(s) (Search Results)						
Routing List Name:			Organization Name: DTMOCSD			
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	DTMOCSD	CSD	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	EWTS TRAINING	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	Training	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD460FM	MM	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDOPS	DEFAULT	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDTRAINING	RL1	Yes
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 5-25: Routing List(s) (Search Results) Screen

4.6.1 Add a Routing Element

To add the same routing element to more than one routing list, begin on the **Routing List (Search Results)** screen (Figure 5-25).

1. Check the **Select to Globally Update** check box next to each routing list that you need to update.
2. Select **Add Routing Element**. The **Globally Add Routing Element** screen (Figure 5-26) opens. It displays the routing lists you selected and the tools to update them.

Globally Add Routing Element * Required

Document Type: *

Document Status: *

Signature Name: * † †

Level: *

Process Name:

† Read-only field, use Search button

Routing List(s) To Be Updated:

Organization Name	Routing List Name	Default Routing List
DTMOCS	CSD	No
DTMOCS	EWTS TRAINING	No
DTMOCS	Training	Yes
DTMOCS460FM	MM	Yes
DTMOCSDOPS	DEFAULT	Yes
DTMOCS DTRAINING	RL1	Yes

Figure 5-26: Globally Add Routing Element Screen

3. Complete the **Document Type**, **Document Status**, **Signature Name**, **Level**, and (if needed) **Process Name** fields. These fields all function exactly as described in section 4.2.1 above.

Figure 5-26 shows the **Globally Add Routing Element** fields filled in to add Molly West as a conditional reviewer for OCONUS vouchers. She will appear at level 15 on six routing lists.

4. Select **Globally Add Routing Element**. The **Globally Add Routing Element Summary** screen (Figure 5-27) opens. It indicates the success or failure when updating each routing list. There are many reasons an update might fail, for instance, trying to add a new **Document Status** at a level occupied by a different status. (Example: Trying to add **REVIEWED** at level 20 when **AUTHORIZED** is already at level 20).

Globally Add Routing Element Summary			
Organization Name	Routing List Name	Default Routing List	Update Result
DTMOCSD	CSD	No	Successful
DTMOCSD	EWTS TRAINING	No	Successful
DTMOCSD	Training	Yes	Successful
DTMOCSD460FM	MM	Yes	Successful
DTMOCSDOPS	DEFAULT	Yes	Successful
DTMOCSDTRAINING	RL1	Yes	Successful

Figure 5-27: Globally Add Routing Element Summary Screen

5. Select **OK**. The **Routing List(s) (Search Results)** screen opens.

4.6.2 Remove a Routing Element

To remove a routing element from multiple routing lists, begin on the **Routing List(s) (Search Results)** screen (Figure 5-25).

1. Check the **Select to Globally Update** check box next to each routing list that you need to update.
2. Select **Remove Routing Element**. The **Globally Remove Routing Element** screen (Figure 5-28) opens. It displays the routing lists you selected in step 1 and the tools to update them.

Globally Remove Routing Element		
Document Type: ¹	<input type="text" value="Voucher"/>	<input type="button" value="Search"/>
Document Status: ²	<input type="text"/>	<input type="button" value="Xorg Search"/>
Signature Name: ²	<input type="text"/>	
Level: ¹	<input type="text" value="15"/>	
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
DTMOCSD	CSD	No
DTMOCSD	EWTS TRAINING	No
DTMOCSD	Training	Yes
DTMOCSD460FM	MM	Yes
DTMOCSDOPS	DEFAULT	Yes
DTMOCSDTRAINING	RL1	Yes
<input type="button" value="Globally Remove Routing Element"/> <input type="button" value="Cancel"/>		

Figure 5-28: Globally Remove Routing Element Screen

3. Complete the necessary **Document Type**, **Document Status**, **Signature Name**, and

Level fields to update the routing. Once you select certain fields, requires you to the select others. These requirements appear on the screen. These fields all function exactly as described in section 4.2.1 above.

Figure 5-28 shows the **Globally Remove Routing Element** fields filled in to remove all reviewers at level 15 on six routing lists.

4. Select **Globally Remove Routing Element**. The **Globally Remove Routing Element Summary** screen opens. It indicates the success or failure when updating each routing list. There are many reasons an update might fail, for instance, trying to remove a routing element from a level that was not on a routing list.
5. Select **OK**. The **Routing List(s) (Search Results)** screen opens.

4.6.3 Replace a Routing Element

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

1. Check the **Select to Globally Update** box next to all of the routing lists you want to change.
2. Select **Replace Signature Authority**. The **Globally Replace Signature Authority** screen (Figure 5-29) opens.

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	CSD	No
DTMOCS	EWTS TRAINING	No
DTMOCS	Training	Yes
DTMOCS460FM	MM	Yes
DTMOCSDOPS	DEFAULT	Yes
DTMOCSDTRAINING	RL1	Yes

Figure 5-29: Globally Replace Signature Authority Screen

3. Complete the **Old Signature Name** and **New Signature Name** fields. The **Search** and **Xorg Search** function as described in section 4.2 above.
 - For the **Old Signature Name**, select the name of the Routing Official you are replacing.

- For the **New Signature Name**, select the name of the new Routing Official.
4. Select **Globally Replace Signature Authority**. The **Globally Replace Signature Authority Summary** screen opens. It indicates the success or failure when updating each routing list. There are many reasons an update might fail, for instance, trying to replace a Routing Official that was not on a routing list.
 5. Select **OK**. The **Routing List(s) (Search Results)** screen opens.

4.7 Create a Routing List for a Self-AO

If a traveler frequently engages in official travel at short notice, it may make sense to designate that traveler as a Self-Authorizing Official (Self-AO). A Self-AO can approve their own DTS authorization, which can vastly reduce approval time. It is important to not, however, that a Self AO cannot approve any document that would result in a payment to the traveler, which means that a Self AO cannot approve any:

- Authorization that requests a travel advance or scheduled partial payments (SPPs)
- Voucher or local voucher

4.7.1 Designate a Traveler as a Self-AO

Before you can designate someone as a Self-AO, that person must take an approved training course and receive appointment as an AO on a DD Form 577. You can find additional information about that process in the *DTS Financial Field Procedures Guide*. Additionally, a Self-AO's DTS profile must reflect appointment as a Self-AO. Essentially, this means their profile must reflect that the Self-AO Approval radio button must be set to **Yes** and they must have permission levels 0, 1, and 2.

You may also consider changing the default routing list in the Self-AO's DTS profile to be the routing list showing them as a Self-AO (i.e., the routing list you create in section 4.7.2).

For more information about checking and updating personal profiles in DTS, see the *DTA Manual, Chapter 7*.

4.7.2 Identify a Traveler as Self-AO in a Routing List

You must create a routing list for the Self-AO. On it, identify the Self-AO as an AO for authorizations only. Then, either designate someone else to serve as an AO for vouchers and local vouchers or instruct the Self-AO to use a different routing list, since the Self-AO cannot approve their own vouchers or local vouchers.

Figure 5-30 shows a routing list for all document types, with a Self-AO (Eric West) designated as an AO for authorizations only. **Note:** You can't tell just by looking at the routing list that the individual is a Self-AO.

Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Authorization	APPROVED	Helen D West	25	
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Authorization	APPROVED	Eric T West	25	
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Local Voucher	APPROVED	Helen D West	25	
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Local Voucher	APPROVED	Chris A West	25	
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Voucher	APPROVED	Helen D West	25	
<input type="button" value="Update"/> <input type="button" value="Remove"/>	Voucher	APPROVED	Chris A West	25	

Figure 5-30: Update Routing List Screen

5 Routing List Module Reports

5.1 View Routing List List

The **Routing List List*** shows you key information about the routing lists your organizations own.

*Yes, that's the report's name. It's essentially a "list of routing lists."

To run a routing list Report:

1. From any screen in the **Routing Lists** module, select **View Routing List List** in the **DTA Tools** bar. The **View Routing List List** screen (Figure 5-31) opens.

Figure 5-31: View Routing List List Screen

2. (optional) Your main organization name appears by default in the **Organization Name**

text field. You can enter a different organization instead.

3. (optional) Check the **Include Sub-Organizations** box to include search results from organizations subordinate the selected organization.
4. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

5.2 View Delegated Authorities List

The **Delegated Authorities List** shows you which of your organizations' Routing Officials have delegated their signature authority, and to whom.

To run a delegated authorities Report:

1. From any screen in the **Routing Lists** module, select **View Delegated Authorities List** in the **DTA Tools** bar. The **View Delegated Authorities List** screen (Figure 5-32) opens.

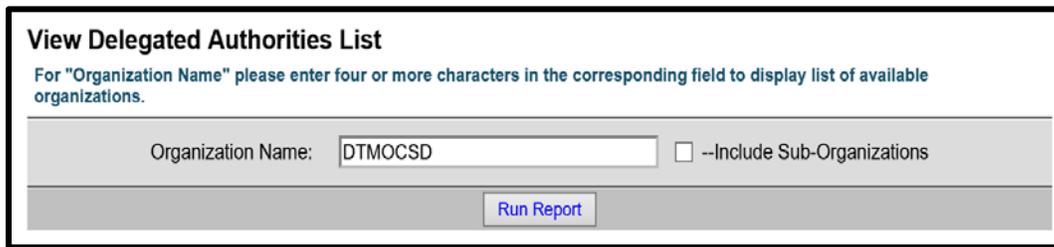


Figure 5-32: View Delegated Authorities List Screen

2. (optional) Your main organization name appears by default in the **Organization Name** text field. You can enter a different organization instead.
3. (optional) Check the **Include Sub-Organizations** box to include search results from organizations subordinate the selected organization.
4. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

6 The DTA Manual: Contents & Links

DTA MANUAL CHAPTER: TOPIC	URL (SELECT OR CUT & PASTE)
Chapter 1: DTS Overview	https://www.defensetravel.dod.mil/Docs/Training/DTA_1.pdf
Chapter 2: DTS Access	https://www.defensetravel.dod.mil/Docs/Training/DTA_2.pdf
Chapter 3: DTS Site Setup	https://www.defensetravel.dod.mil/Docs/Training/DTA_3.pdf
Chapter 4: Organizations	https://www.defensetravel.dod.mil/Docs/Training/DTA_4.pdf
Chapter 5: Routing Lists	https://www.defensetravel.dod.mil/Docs/Training/DTA_5.pdf
Chapter 6: Groups	https://www.defensetravel.dod.mil/Docs/Training/DTA_6.pdf
Chapter 7: People	https://www.defensetravel.dod.mil/Docs/Training/DTA_7.pdf
Chapter 8: LOAs	https://www.defensetravel.dod.mil/Docs/Training/DTA_8.pdf
Chapter 9: Budgets	https://www.defensetravel.dod.mil/Docs/Training/DTA_9.pdf
Chapter 10: Reports	https://www.defensetravel.dod.mil/Docs/Training/DTA_10.pdf
Chapter 11: MIS Administration	https://www.defensetravel.dod.mil/Docs/Training/DTA_11.pdf
Chapter 12: ROA Administration	https://www.defensetravel.dod.mil/Docs/Training/DTA_12.pdf

DTA MANUAL APPENDIX: TOPIC	URL (SELECT OR CUT & PASTE)
Appendix A: Self-Registration	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_A.pdf
Appendix B: Acronyms	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_B.pdf
Appendix C: Definitions	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_C.pdf
Appendix E: Emails	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_E.pdf
Appendix F: Import / Export Module	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_F.pdf
Appendix G: Error Codes	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_G.pdf
Appendix J: Help Process	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_J.pdf
Appendix K: DTS Tables	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_K.pdf
Appendix L: Reorganizations	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_L.pdf
Appendix M: Ranks and Grades	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_M.pdf
Appendix N: Country Codes	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_N.pdf
Appendix Q: Org Naming Sequence	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_Q.pdf
Appendix R: LOA Formats	https://www.defensetravel.dod.mil/Docs/Training/DTA_App_R.pdf