Defense Travel System

DTA Manual, Chapter 5: Routing Lists

January 28, 2021
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<td></td>
<td>General review</td>
<td>Section 4</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Throughout</td>
</tr>
</tbody>
</table>
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 sends 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 the routing list is empty. You must populate it before you can use the routing list for document processing. When you add the routing stamps, set it 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 organization’s 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., training or medical 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’s 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 updating personal profiles in DTS, see the DTA Manual, Chapter 7: People.

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

There are three document types in DTS: authorizations/group authorizations, vouchers, and local vouchers. Typically, a routing list support all three document types and includes the necessary routing elements. For example, for a TDY mission, a traveler’s routing list would include the steps for an authorization and voucher. See Table 5-1 routing list example.

2.2 Document status

The document status indicates the 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 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 status 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, a best practice is to always put multiple personnel at the same level (e.g., three AOs at level 25).
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 its use is optional.

See sections 4.2.1.2 through 4.2.1.4 in this chapter and the [DTA Manual, Appendix K](https://www.defensetravel.dod.mil) for further details.
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 also stamp the document with your designated routing list stamp such as **REVIEWED** or **APPROVED**. In this situation, another Routing Official would review and stamp the document.

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 claim 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 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 using conditional routing, you may assign them the **REVIEWED1**, **REVIEWED2**, or **REVIEWED3** stamp.

- **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.

**Note:** AO’s/CO’s must complete required training and be appointed in writing (DD Form 577) to serve in this role.

When a document routes to a Routing Official, DTS sends an email for required action. If multiple Routing Officials are at the same level (which is a recommended practice), they all receive the same email. When one of them stamps the document, DTS removes the document from the other Routing Officials’ queue, as no current action is required. **Note:** DTS emails the traveler for **completed** document stamping actions by the system or an individual (e.g., CTO Booked, Reviewed). Routing Officials receive emails for actions **required** (e.g., Document awaiting Review) and not when...
another Routing Official completed a stamping action. For more information on DTS emails, see the DTA Manual, Appendix E: Emails.

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 Officials’ queue 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 a 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: DTS Tables 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 performed quality checks for the requested reservations 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 DTS organization structure displayed in this manual are for training purposes only. The *DTA Manual, Appendix Q* provides primary organization structures for each Component.
Table 5-1

<table>
<thead>
<tr>
<th>Doc Type</th>
<th>Doc Status</th>
<th>Signature Name</th>
<th>Level</th>
<th>Process Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>AUTH 1</td>
<td>CTO SUBMIT</td>
<td><strong>CTO SUBMIT</strong></td>
<td>3</td>
<td>BYPASS PNR* 5</td>
</tr>
<tr>
<td>AUTH 1</td>
<td>CTO BOOKED</td>
<td><strong>CTO BOOKED</strong></td>
<td>4</td>
<td>BYPASS PNR* 5</td>
</tr>
<tr>
<td>AUTH 1</td>
<td>REVIEWED</td>
<td>Shelly Smith 2</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>AUTH 1</td>
<td>REVIEWED</td>
<td>Sidney Carson 2</td>
<td>10 3</td>
<td></td>
</tr>
<tr>
<td>AUTH 1</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20 3</td>
<td></td>
</tr>
<tr>
<td>AUTH 1</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>LCVH 1</td>
<td>REVIEWED</td>
<td>Shelly Smith</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LCVH 1</td>
<td>REVIEWED</td>
<td>Sidney Carson</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>LCVH 1</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>LCVH 1</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>VCH 1</td>
<td>REVIEWED</td>
<td>Shelly Smith</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH 1</td>
<td>REVIEWED</td>
<td>Sidney Carson</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>VCH 1</td>
<td>APPROVED</td>
<td>Chris West</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>VCH 1</td>
<td>APPROVED</td>
<td>Caroline Cruz</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

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. For TMC steps, only use conditional routing BYPASS PNR. Routing rows without a Process Name are not conditional routing.

Figure 5-1: Sample Organization Chart
4 Working with Routing Lists in DTS

To manage and maintain the DTS 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](image)

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 the drop-down menu in **DTA Tools** and switch to another module.

![Figure 5-3: DTA Maintenance Tool Home Page](image)

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 displays options:
• 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.

![Figure 5-4: Search Routing List(s) Screen](image_url)

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

See Table 5-2 for the Routing List(s) (Search Results) screen fields or objects and their descriptions.

Table 5-2

<table>
<thead>
<tr>
<th>Field or Object</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text items at the top of the screen (e.g., Default Routing Lists Only)</td>
<td>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 the item is blank if you did not.</td>
</tr>
<tr>
<td>Select to Globally Update</td>
<td>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.</td>
</tr>
<tr>
<td>Individually Edit</td>
<td>Column containing buttons that let you Update, Copy, or Delete a single routing list.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>Column that displays the organizations that own the displayed routing lists.</td>
</tr>
<tr>
<td>Routing List Name</td>
<td>Column that shows the routing lists that match your search criteria.</td>
</tr>
<tr>
<td>Default Routing List</td>
<td>Column that identifies whether the routing list is an organization’s default routing list.</td>
</tr>
<tr>
<td>Globally Update Selected Routing Lists (on this page)</td>
<td>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.</td>
</tr>
</tbody>
</table>

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).

![Update Routing List Screen – New Routing List](image)

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

![Update Routing List Screen – CTO Stamps Added](image)

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

5. Select a **Document Status**.

6. 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.

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. **Note:** Entering the first name along with the last name is an option. Searching by only the first name is not permissible.

9. Select **Search**. The **Search People Results** screen (Figure 5-10) opens. It displays key information about everyone who met your search criteria.
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.

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. through 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 allow you to save changes until you enter APPROVED for a Document Status for at least one Document Type.
16. The **Routing Lists(s) (Search Results)** page re-opens (Figure 5-13).

17. Select **Update** next to the routing list you just modified to view the elements you added for the **Organization Name (DTMOCSDOPS)** 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](image)

**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](image)

**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>
<thead>
<tr>
<th>Process Name</th>
<th>Check for Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>BYPASS PNR</td>
<td>Checks for reservations in an authorization. If no reservations exist, the document skips TMC processing.</td>
</tr>
<tr>
<td>FOREIGN TRAVEL</td>
<td>Checks for travel from a CONUS location to any OCONUS location. OCONUS locations include non-foreign OCONUS locations, such as Alaska or Guam.</td>
</tr>
<tr>
<td>OCONUS/CONUS</td>
<td>Checks for travel from an OCONUS location to a CONUS location. OCONUS locations include...</td>
</tr>
</tbody>
</table>
non-foreign OCONUS locations, such as Alaska or Guam.

<table>
<thead>
<tr>
<th>OCONUS/OCONUS</th>
<th>Checks for travel from an OCONUS location to a different OCONUS location. Include non-foreign OCONUS locations, such as Alaska or Guam.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PREMIUM CLASS FARE</td>
<td>Checks for non-economy/coach class fares such as business or first class.</td>
</tr>
<tr>
<td>TRAVEL MODE ROUTE*</td>
<td>Checks the selected transportation mode.</td>
</tr>
<tr>
<td>TRAVELER NUMBER</td>
<td>Checks the number of travelers in a group authorization. If the number is 10 or more, the document routes to a Transportation Officer (TO).</td>
</tr>
<tr>
<td>LEAVE REQUESTED</td>
<td>Checks for an annual leave or non-duty status. This option is available for vouchers only.</td>
</tr>
</tbody>
</table>

*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.

![Add Routing Element](image)

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

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>Commercial Auto TDY/TAD</td>
</tr>
<tr>
<td>CB</td>
<td>Commercial Bus</td>
</tr>
<tr>
<td>CB-C</td>
<td>Commercial Bus (CBA)</td>
</tr>
<tr>
<td>CF</td>
<td>TMC Fee (IBA)</td>
</tr>
<tr>
<td>CF-I</td>
<td>TMC Fee (IBA)</td>
</tr>
<tr>
<td>CF-C</td>
<td>TMC Fee (CBA)</td>
</tr>
<tr>
<td>CP</td>
<td>Commercial Plane</td>
</tr>
<tr>
<td>CP-C</td>
<td>Commercial Plane (CBA)</td>
</tr>
<tr>
<td>CR</td>
<td>Commercial Rail (IBA)</td>
</tr>
<tr>
<td>CR-C</td>
<td>Commercial Rail (CBA)</td>
</tr>
<tr>
<td>CV</td>
<td>Commercial Vessel</td>
</tr>
<tr>
<td>GA</td>
<td>Government Auto</td>
</tr>
<tr>
<td>GB</td>
<td>Government Bus</td>
</tr>
<tr>
<td>GP</td>
<td>Government Plane</td>
</tr>
<tr>
<td>GV</td>
<td>Government Vessel</td>
</tr>
<tr>
<td>PA</td>
<td>Private Auto TDY/TAD</td>
</tr>
<tr>
<td>PM</td>
<td>Private Motorcycle TDY/TAD</td>
</tr>
<tr>
<td>PP</td>
<td>Private Plane</td>
</tr>
<tr>
<td>PV</td>
<td>Private Vessel</td>
</tr>
<tr>
<td>TB</td>
<td>Prepaid Bus</td>
</tr>
<tr>
<td>TP</td>
<td>Prepaid Plane</td>
</tr>
<tr>
<td>TR</td>
<td>Prepaid Rail</td>
</tr>
<tr>
<td>TV</td>
<td>Prepaid Vessel</td>
</tr>
</tbody>
</table>

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.
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.

3. Make all the 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 requires a few changes to the elements, copying can be a huge time saver, as you will not 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.

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** 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, start 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).

   ![Delete Routing List Screen](image)

   **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 the list. However, if you cannot remove the routing list, a **Domain Error** message (Figure 5-23) displays to explain the situation.

   ![Domain Error Message](image)

   **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.

   ![Create Routing List Screen](image)

   **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 elements before a traveler can use the routing list for document processing.

4.6 Update Multiple Routing Lists

In DTS, **global** maintenance is the ability to adjust routing elements on multiple routing lists at the same time. To use the global feature, you must first search for all the routing lists you want to modify. Based upon the return results, you may **Add** or **Remove Routing Element** and **Replace Signature Authority** on existing routing lists. **Note:** Using standardized routing stamps and steps (e.g., Reviewed 10, Approved 20) makes changing routing lists elements easier.
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 available routing elements.
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 selected 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. (e.g., Adding REVIEWED at level 20 when AUTHORIZED is already at level 20).

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Routing List Name</th>
<th>Default Routing List</th>
<th>Update Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>DTMOCSGD</td>
<td>CSD</td>
<td>No</td>
<td>Successful</td>
</tr>
<tr>
<td>DTMOCSGD</td>
<td>EWTS TRAINING</td>
<td>No</td>
<td>Successful</td>
</tr>
<tr>
<td>DTMOCSGD</td>
<td>Training</td>
<td>Yes</td>
<td>Successful</td>
</tr>
<tr>
<td>DTMOCSGD400FM</td>
<td>MM</td>
<td>Yes</td>
<td>Successful</td>
</tr>
<tr>
<td>DTMOCSDOPS</td>
<td>DEFAULT</td>
<td>Yes</td>
<td>Successful</td>
</tr>
<tr>
<td>DTMOCSDTRAINING</td>
<td>RL1</td>
<td>Yes</td>
<td>Successful</td>
</tr>
</tbody>
</table>

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 options to update them.
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 populated 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.
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) in certain situations. A Self-AO can approve their own DTS authorization, which may reduce approval time. However, a Self AO cannot approve their own document that would result in a payment, which means 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, check your local business rules for any required training. In DTS, the Self-AO’s profile must reflect the specialized role. To do so, set the Self-AO Approval radio button to **Yes** and make sure the permission
levels reflect 0 and 2. **Note:** Follow your local business rules for granting permission level 1 (view budget) to AOs.

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 updating personal profiles in DTS, see the *DTA Manual, Chapter 7: People*. You can find additional information about the DTS User roles in the *DTS Regulations, DoDI 5154.31* and Self-AOs in the *DTS Financial Field Procedures Guide*.

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

A Self-AO must be on the routing list 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. Organizations must follow their local business rules for tracking Self-AO roles.

![Figure 5-30: Update Routing List Screen](image-url)
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.

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.
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

<table>
<thead>
<tr>
<th>DTA MANUAL CHAPTER: TOPIC</th>
<th>URL (SELECT OR CUT &amp; PASTE)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
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</tr>
</thead>
</table>