



*Defense Travel System*

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**DTS Implementation Guide**

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## Revision History

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# CHAPTER 1: Overview of the Defense Travel System (DTS) Implementation Guide

The implementation process for the Defense Travel System (DTS) is outlined in this guide. The successes and failures of fielding are discussed, lessons learned from past experiences, and DTS proliferation issues are addressed.

## 1.1 The Scope of Fielding

The services and agencies are responsible for fielding DTS and assume all related deployment costs.

Fielding DTS encompasses the coordination of planned stages. The stages include the below:

- Command Visit (CV)
- Initial Site Planning (ISP)
- DTS Organization Setup
- DTS Validations
- Site Training Strategy
- Business Process (BP) Setup
- Live Process Verification (LPV)
- Customer Support (CS)

These stages of fielding ensure that sites have the necessary hardware, software, communications, data, administrative setup, and local help desk availability. Throughout these stages there are various tasks and associated deadlines that must be met and are tracked by using the Site Fielding checklist (Appendix B).

## CHAPTER 2: Roles and Responsibilities

There are a number of key players and roles in making DTS Fielding implementation successful. The fielding effort is a cooperative effort among the Defense Travel Management Office (DTMO), the Service/Agency Representatives (S/A Representatives), the Travel Assistance Center (TAC), and the site personnel who compose the site fielding team.

### 2.1 Defense Travel Management Office (DTMO)

The DTMO coordinates with the Service or Agency Representatives to support their fielding efforts. Below are the main areas where the DTMO will provide process support or tools to assist the Service or Agency Office:

- Commercial Travel Office (CTO) connectivity, setup and verification
- Centrally Billed Account (CBA) Reconciliation Module setup (if applicable)
- Enterprise Web Training System (EWTS) Public Key Infrastructure (PKI) certificates
- Resource for Training Materials (Reference manuals, instructor materials, and e-learning)

### 2.2 Service and Agency Representatives

Service and Agency Headquarters have appointed representatives to facilitate the fielding of DTS to sites. These personnel will assist in the following efforts:

- Support DTMO in managing the fielding of DTS to sites worldwide
- Develop site-specific task schedule that identifies required events for site fielding
- Liaise among DTMO, TAC, and affected Service or Agency commands or activities during site prefielding, fielding, and post fielding processes
- Provide service or agency-specific processes and procedures

### 2.3 Site Personnel

The Lead Defense Travel Administrator (LDTA) should have a team of individuals at their site who will assist with DTS implementation and sustainment. These roles are described below:

- **Lead DTA (LDTA).** Serves as the site coordinator and main point of contact (POC) for site implementation and sustainment
- **Organizational DTA (ODTA).** Administers and maintains DTS at an organizational level
- **Finance DTA (FDTA).** Manages and supports the financial aspects of DTS (e.g., lines of accounting, debt management)
- **Budget DTA (BDTA).** Adjusts travel targets; role may be combined with FDTA
- **Transportation Officer (TO)/Centrally Billed Account (CBA) Specialist.** Advises on local travel policy and assists in acquiring CBA information

## CHAPTER 3: Site Setup Administration

The Defense Travel System (DTS) Site Setup Administration module is where the Site Setup Official begins the DTS Site Setup process. The process includes the following steps:

- Create a new site
- Create a main organization
- Create a Lead Defense Travel Administrator (LDTA)

Access to the Site Setup Admin module is reserved for users (Service and Agency Representatives) with permission level 7. Site and main (or root) organization setup and selection of a site's LDTA must be coordinated with the Service or Agency Representatives and the site point of contact (POC). Setup begins at the service or agency level with the entry of a new site into the site table. Next, the main organization for that service or agency at that site is created and the LDTA for that site is assigned. Service or Agency DTAs create all sites by using the DTS Deployment Tool as part of the initial setup (Appendix C, Section C.2.1.1).

The Service or Agency Representative or a designee must notify authorized users (i.e., LDTAs) when the new site and main organization has been established in DTS. The LDTA will then self-register. After acceptance, the LDTA will enter new site information into DTS.

Descriptions of a site and main organization are:

**Site.** A site in DTS is a geographic location and consists of main organizations. A site may consist of organizations from a single service or agency or may consist of many, as in a joint command.

**Main Organization.** The main organization is the highest level of an organization's DTS naming sequence. A site can contain multiple main organizations. The main organization is established in DTS by the Service or Agency Representative. After initial contact with the site POC, the Service or Agency DTAs can create the main organizations for their site.

**Note:** The term *main organization* has the same meaning as root organization, which is used in other parts of DTS. The Deployment Tool uses the term *root organization*.

## CHAPTER 4: Initial Site Planning (ISP)

The Lead Defense Travel Administrator (LDTA) must consider the planning implications before beginning ISP. The below information must be taken into consideration to complete planning for a site:

- **Organization Naming Sequence.** Obtain from the Service or Agency
- **Organization Routing List, and Group Naming Conventions.** Obtain from the service, MACOM, or MAJCOM
- **Groups and Group Access for Higher-Level Organizations.** Obtain from the Service, Agency, or MAJCOM
- **Travel Policies and Procedures Unique to DTS.** Obtain from the Service, Agency, or MAJCOM

ISP is conducted during the same week as the command visit. The fielding team must establish communication and preplanning before the initial visit. Prior to the command visit and ISP, the fielding team will create training surveys and rosters, meeting schedules, and other documentation. The Site Fielding checklist (Appendix B) contains most of the recommended tasks for deploying DTS to a site. The Site Fielding checklist also identifies the recommended duration for each task, action point of contact, priority, key milestones, and contains formulas that will build a proposed schedule based on the site's planned initial operating capability (IOC). The below list will be accomplished by the fielding team during ISP:

- Discuss the requirements and purpose for a rejected e-mail address
- Ensure that the site has union representative involvement
- Involve the site Public Affairs Office (PAO) personnel and transfer PAO contact information to the Defense Travel Management Office (DTMO)
- Identify DTAs who require training
- Plan logistical setup for Business Process (BP) sessions and setup sessions
- Prepare for Live Process Verification (LPV)
- Discuss the local help desk
- Discuss proliferation and training

**Recommendations:** It can be challenging to complete ISP in one day with the degree of thoroughness required. It is important that the fielding team be extremely thorough during ISP, and pay careful attention to the site's hierarchy. During ISP, the team must be aware of and address any remote organizations that belong to the site. If not, it may become necessary to revisit or field sites in which the higher command has already been fielded.

### 4.1 Commercial Travel Office (CTO)

The site must determine if CTO connectivity will be available for DTS setup. If CTO connectivity is not available, then the site must confirm the intention to set up DTS-Tailored (CTO). CTO connectivity will help determine which business processes and system configuration will be used to support DTS. If CTO connectivity will occur, the CTO contract must be reviewed to determine if new terms or conditions are required.

The LDTA needs certain information from the CTO, so that the deployment of DTS can be completed. The below information is required:

- Pseudo-city code (PCC)
- Ticket PCC
- Global Distribution System (GDS)
- GDS company code for the site
- Centrally Billed Account (CBA) information for airline tickets (if required)

If there will be no CTO connectivity, the site will be set up as DTS-Tailored (CTO). The impact occurs during the creation and/or amendment of the authorization. When changes are required, access to real-time air, lodging, or rental car availability is not provided. The CTO must be contacted directly (by phone, fax, or e-mail) and request that reservations be made or changed for the trip. The quoted costs for the reservations will be entered into the authorization.

## 4.2 Defense Accounting and Disbursement System (DADS)

The appropriate DADS needs to be identified and requires verification that it is interfaced with DTS to ensure that the channels are established in the Global Exchange (GEX). Additionally, the site may request a line of accounting (LOA) download from the accounting system to facilitate upload of LOAs into DTS.

If the site is to be set up without DADS connectivity, the site must complete a DTS-Tailored (DADS) organization form. This form includes all necessary information that the Travel Assistance Center (TAC) Payment module administrator needs to complete the setup. When documents are created that require blocked LOAs, the documents are not electronically transferred to the financial accounting system. Local business rules must be created and followed to process travel documents for payment. For further guidance, see the *Financial Field Procedures Guide*.

## 4.3 CBA Setup

During ISP, a determination needs to be made if a CBA will be used to support DTS travelers when ticketing air fare and rail with the CTO.

Services and agencies should contact the appropriate site POC for issues or inquiries.

Service POCs are listed below:

- **Air Force:** AFDTS.CBA@pentagon.af.mil
- **Army:** ArmyCBARquest@dfas.mil
- **Marine Corps:** DTSMCST@usmc.mil
- **Navy:** NavyDTS@navy.mil

Agency inquiries are to be handled as follows:

Defense Agencies/Joint Commands must submit a help desk ticket through the Tickets section of the Traveler Explorer (TraX) or by calling the TAC at 1-888-Help1Go (888-435-7146).

There are two kinds of CBAs that can be used in DTS:

- Traditional CBA (manual)
- DTS Reconciliation Account (automated)

**Traditional CBA.** CBA is selected when creating DTS reservations, but reconciliation of the account is completed outside of DTS. It is a manual process with a paper-based invoice delivered to the Transportation Officer (TO)/CBA Specialist for processing.

**DTS Reconciliation Account.** A site establishes a new CBA. The site first requests the account from the Government Travel Charge Card (GTCC) vendor and then submits it to the DTMO for loading. Information on how to submit a CBA load request can be found on the DTMO Web site at:

[www.defensetravel.dod.mil/site/reference.cfm](http://www.defensetravel.dod.mil/site/reference.cfm)

If a site determines that it would like to use the CBA Reconciliation module the below information should be reviewed in terms of the organization's DTS processes to determine readiness to implement the Reconciliation Module:

- CTO Processing
- TO or CBA Specialist actions
- Authorizing Official (AO) actions
- Financial obligation processing

CTO processing considerations are as follows:

1. Ensure that CTO contracts and business rules address the requirement to return ticketed Passenger Name Records (PNRs) back to DTS. This populates the ticket number and amount as well as any applicable CTO fees.
2. Review the organization's recent credit card vendor (CCV) invoices that were reconciled outside of DTS and determine the success rate of potential matches against DTS transactions.
  - a. How many would have resulted in matches on ticket number and cost?
3. If there appears to be a low percentage of ticketed PNRs being returned to DTS, the organization should not be considered as a candidate for the CBA Reconciliation module until this issue is resolved.
4. Address this issue with the Commercial Travel Division at the DTMO if applicable.

TO or CBA Specialist actions are listed below:

1. Encourage travelers to use the DTS Travel module when making travel arrangements and use of the CTO Assistance link when desired flights are not available.
2. Ensure that travelers understand the organization's policy and business rules regarding CBA use.
  - Ensure that travelers with Individually Billed Accounts (IBAs) have the accounts loaded in DTS
  - Coordinate with the DTA or Agency Program Coordinator (APC) as necessary
3. Perform a cursory review of the organization's recent authorizations. Identify whether the DTS Reservation module is being used to make travel arrangements.
4. If there appears to be a low usage of the DTS Travel module or CTO Assistance link in DTS, the organization should not be considered a candidate for implementation until this issue is resolved. The issue needs to be addressed with DTA for possible retraining of travelers.

AO actions are listed below:

1. Ensure that AOs understand the organization's policy and business rules related to CBA use. AO enforcement via the DTS approval process is critical to validate proper use of the account.
2. Ensure that AOs understand that invalid use or a misunderstanding of the business rules can lead to erroneous payments.
3. Ensure that AOs approve travel documents in a timely manner. A DTS report should be run to validate this.

4. If the organization lacks a clear and enforced CBA use policy, it is not a good candidate for implementation. Address the issue with the organization's leadership or the Service or Agency Representative to correct.

## 4.4 Information Technology (IT)

The site IT department must be aware of the security measures in place and how they affect the use of DTS.

### 4.4.1 Public Key Infrastructure (PKI)/Common Access Card (CAC)

DTS users must have a signature token to gain access to DTS. DTS uses the CAC as the signature token. The CAC is a card with an embedded chip that contains a user's public key. The computer reads the data from the CAC and allows access to DTS.

## 4.5 Certifying Officer Appointment Process

### 4.5.1 DD577 Signature Card

All AOs and Certifying Officers (COs) must be appointed in writing using the DD577 signature card.

The DD577 will need to be filed during the business process session. TOs and CBA Specialists who certify CBA invoices will need to file a DD577 as well. Templates can be found in the *Financial Field Procedures Guide*.

### 4.5.2 Training for Authorizing Officials and Certifying Officers

All AOs and COs are required to complete specialized training, such as the Training for Accountable Officials and Certifying Officers (TAOCO) course located in the Travel Explorer (TraX). This training is recommended for all Accountable Officials. Information on TAOCO and other training options can be found at [http://www.defensetravel.dod.mil/Docs/Training/Training for Accountable Officials.pdf](http://www.defensetravel.dod.mil/Docs/Training/Training%20for%20Accountable%20Officials.pdf).

#### 4.5.2.1 DTS and Policy Training (Highly Recommended)

Per the DoD FMR an AO should be knowledgeable in travel and the preparation of a voucher for payment. Therefore, it is highly recommended the AO also complete training on DTS Document Processing and Temporary Duty Travel policy. Guidance on becoming knowledgeable in these areas should be given from the Service or Agency Office when fielding. These courses are available in a variety of formats within the TraX.

## CHAPTER 5: Business Process and Setup Prep

The fielding team will meet with the Transportation Office, Commercial Travel Office (CTO), and other organizations at a site to conduct Business Process sessions that document the current business processes, and then define the business processes in conjunction with DTS. It is important for everyone involved to review the current business processes and ensure understanding prior to making decisions that could impact the setup of DTS. The first half of the meeting will focus on analyzing the site's current travel business processes. The second half of the meeting will concentrate on the revised process that must be implemented when DTS is fielded. In preparation for business process sessions the fielding team should conduct a kickoff to reiterate the items that are needed for the individual meetings. During this stage, the fielding team will complete the below:

- Review of current and future processes
- Discuss organizational setup
- Formulate routing lists and gather routing details
- Name groups
- Discuss permission levels and identify the personnel who need them
- Initiate the setup process in the Deployment Tool

**Recommendations:** Depending upon the size of the organization, the business process setup stage may be compressed into a one-week period.

Successful planning during ISP will result in an easier time with business process setup.

### 5.1 Business Rules

While documenting current business processes, a review of the service or agency standard Business Rules document must be reviewed to ensure that DTS travel is accomplished in accordance with all requirements. If necessary, sites may tailor their local business rules based on their local travel policies.

### 5.2 Deployment Tools

The DTS Deployment Tool provides authorized users with an environment in which to enter, validate, and submit all of a site's data for upload into the system. This environment, called Staging, is separate from the live DTS environment, called Production. The Deployment Tool assists in creating administrative setup data for an organization such as: organizational structure, routing lists, groups, lines of accounting (LOAs) and an administrator. See Appendix C for the *DTS Deployment Tool*.

A site also has the option to add this information manually via the DTA Maintenance Tool. Refer to the *Defense Travel Administrator's Manual* for further guidance.

### 5.3 Self Registration

There are two methods for people to be added to DTS. One method is manual entry using the DTA Maintenance Tool. The other method is to use the Self-Registration feature. DTAs and routing officials must self-register in DTS prior to data being loaded in the Production database. See Appendix C, Attachments A and B of this document and Chapter 1 of the *DTS Document Processing Manual* for further guidance.

## CHAPTER 6: Live Process Verification (LPV)

Live Process Verification achieves:

- Verify login capability and increase familiarity of DTS users
- Verify administrative setup (e.g., routing lists, lines of accounting (LOAs), budget)
- Verify the public key infrastructure (PKI) and archive functionality
- Verify the interfaces with the Commercial Travel Office (CTO), Global Exchange (GEX), Defense Accounting and Disbursement System (DADS) and Global Distribution Systems (GDS)

The LPV stage consists of processing a limited number of documents to ensure that administrative setup has been completed. In preparation for LPV, there needs to be a validation check of organizational data and coordination with the CTO. During the LPV stage the fielding team will perform the below:

- Verify that appointment criteria have been met (DD577s and required training for Authorizing Officials (AOs) and Certifying Officers (COs))
- Ensure that travelers, Non-DTS Entry Agents (NDEAs), Travel Clerks, Defense Travel Administrators (DTAs), and Routing Officials have self-registered
- Verify permission levels and group access
- Ensure that each LOA has an associated budget with funds loaded
- Coordinate with CTO and DADS points of contact (POCs) for the LPV
- Identify travelers testing for LPVs
- Process documents successfully

**Recommendations:** Depending on the service or agency only a certain amount of organizations will conduct LPVs. In order to ensure that all the organizations will start using and proliferating DTS, the LPV stage should be extended to two weeks. During this time, the fielding team will be able to run more tests and have time to troubleshoot failed documents.

## CHAPTER 7: Training

The Service or Agency Program Management Office (PMO) develops and executes the training strategy plan.

### 7.1 Service and Agency Training Resources

The Sponsoring Service or Agency PMO will outline the training available for fielding.

### 7.2 DTS Training Resources

The DoD Travel Training and Resource Center, located at <http://www.defensetravel.dod.mil/site/training.cfm> is a gateway for a number of resources that will help improve skills in using the system and finding answers to questions about DTS.

To access e-learning, log in to the TraX located at <https://www.defensetravel.dod.mil/Passport>. Users who do not have an existing account must register for a new account by selecting the **Register** button. After login, select the **Training** tab. Additional instructions for accessing training in TraX can be found at [www.defensetravel.dod.mil/Docs/Training\\_Instructions.pdf](http://www.defensetravel.dod.mil/Docs/Training_Instructions.pdf).

Training Resources include:

#### E-Learning Resources

- Distance Learning Program (Webinar sessions with live instructors)
- Web Modules (Self-paced, anytime/anywhere training modules)
- Demonstrations (Narrated online simulations)

#### Instructor Materials

- Instructor Guides
- Participant Guides
- PowerPoint Slides to accompany instructor guide

Reference Materials (see Descriptions of Reference Materials in Section 7.4)

### 7.3 On-Site Travel Training Services

Travel Training Services are available for on-site delivery. The following are offered for a flat fee\*:

- Two instructors
- Four days of training to include any combination of the courses offered

\*Fee includes TDY travel costs. Different rates apply for continental United States (CONUS) and outside the continental United States (OCONUS) locations.

Benefits of the on-site Travel Training Services include the following:

- Hands-on instruction
- Courses offered at all CONUS and OCONUS locations
- Classes scheduled to meet site requirements
- Employee travel expenses for training eliminated
- Employee time away from work for travel to training eliminated
- Group session capability

The On-Site Travel Training Services Flyer can be found at:

[https://www.defensetravel.dod.mil/Docs/Training/OnSiteTrn/Onsite\\_Training\\_Services\\_Flyer.pdf](https://www.defensetravel.dod.mil/Docs/Training/OnSiteTrn/Onsite_Training_Services_Flyer.pdf)

The fees for on-site Travel Training Services are as follows:

- CONUS Services - \$1150
- OCONUS Services - Please call for training rates

### 7.3.1 Scheduling On-Site Travel Training Services

To schedule training, send an e-mail to DTMO Training at [DTMOtraining@dtmo.pentagon.mil](mailto:DTMOtraining@dtmo.pentagon.mil). Include your name, contact information, location, and preferred dates for training. (Please note that training should be scheduled at least 45 days prior to the actual training session).

**Note:** On-Site Travel Training was formerly known as Optional Services Catalog.

## 7.4 Descriptions of Reference Materials

The DTS Training and Resource center provides additional manuals and resources, including the following:

**Instructor Materials.** These materials may be used by Defense Travel Administrators (DTAs), instructors, and Travel Managers to support instruction. They can be downloaded for both classroom and Distance Learning modules by browsing the Knowledge Center on TraX and linking to the appropriate course.

**Defense Travel Administrator's (DTA) Manual.** This manual is for DTAs to gain knowledge about the DTS system administrative functions relating to setup and maintenance, electronic processing for documents, budget setup, and other related topics.

**DTS Document Processing Manual.** This manual describes document processing and advanced topics such as scheduled partial payments (SPPs), advances, and group authorizations.

**Centrally Billed Account (CBA) Reconciliation Manual.** This manual describes procedures for performing CBA reconciliation functions.

**Debt Management Monitor (DMM) Manual.** This manual describes procedures for accurate tracking, processing, and recording of all actions related to a debt incurred by a traveler in DTS.

**Quick Reference Guides.** These guides provide step-by-step instructions for creating various TDY documents and performing other procedures in DTS.

## CHAPTER 8: Sustainment

### 8.1 Help Support Resolution Process

This chapter contains guidance for the problem resolution process at the self and help desk support levels. Lead Defense Travel Administrators (LDTAs) are normally responsible for developing local policies and procedures for travelers and Authorizing Officials (AOs). A full list of training resources can be found at <http://www.defensetravel.dod.mil/site/training.cfm>.

#### 8.1.1 User Support

This opens a pop-up window, which provides a detailed explanation of how to use the current screen. This feature is available on every DTS screen.

In the pop-up help window, the user may select any hyperlinked text to view more information on a specific topic or select See Table of Contents to search the entire DTS Help database.

**Travel Explorer (TraX)** - Travel Explorer offers a centralized source of travel information including frequently asked questions (FAQs) on commercial travel management, training, and Defense Travel System (DTS) topics. To view all FAQs or search for a specific answer, select the Knowledge Center icon on the TraX Home Page.

To access TraX, users must first register through Passport (<https://www.defensetravel.dod.mil/Passport>), the DTMO's web portal.

#### While traveling:

The Commercial Travel Office (CTO) typically provides a 24/7 toll-free number for assistance on specific trips. The business rules established for their contact and major customers (base, post, camp, station) provide additional information on procedures.

#### 8.1.2 Help Desk Support

**Local Organization Help Desk.** Typically, the Lead DTA for a site is responsible for local level support. This local subject matter expert will assist with problems or refer the user to the Travel Assistance Center (TAC) for assistance. Contact information for local level Help support can be at [www.defensetravel.dod.mil/site/localSupport.cfm](http://www.defensetravel.dod.mil/site/localSupport.cfm).

**Travel Assistance Center (TAC).** The TAC is available to all DoD travelers 24 hours a day, seven days a week including federal holidays. The TAC also provides after hours assistance to those performing recruit travel.

The TAC can be contacted by calling 1-888-Help1Go (888-435-7146) or by submitting a help desk ticket through the Tickets section of TraX. If calling from overseas, use DSN 312-564-3950.

The tickets feature in TraX maintains a record of all call center tickets and provides the capability to track progress of tickets from creation to resolution. In addition, the traveler can access self-help resources such as Frequently Asked Questions (FAQs), user guides, and computer-based training aides through the Knowledge Center and Training section in TraX.

The TAC offers Outreach calls designed to inform and educate the DoD travel community about issues and topics related to DTS.

### **8.1.3 Commercial Travel Office**

The Commercial Travel Office provides a 24x7 toll-free number for assistance and will typically help the traveler with all travel arrangement issues for a trip. The business rules established for CTO contacts and major customers (e.g., base, post, camp, and station) provide additional information on procedures.

## **8.2 Implementation Best Practices**

The below sections detail some of the lessons learned and include recommendations to ensure that implementation of DTS is successful.

### **8.2.1 Command Support of DTS**

Without the backing of the command, there can be resistance from an organization receiving DTS. Command buy-in should be established, supported, and promoted prior to the fielding effort, as it is a factor in fielding success. Early contact with the command element at a site can set a positive tone for an organization during the DTS Fielding effort.

### **8.2.2 Marketing and Awareness**

The site Public Affairs Office (PAO) is responsible for outreach. Outreach is a business development function where a marketing campaign would be conducted to build user awareness for and acceptance of DTS. Well-conducted outreach can help individuals become comfortable with the process changes that accompany a new system implementation. The PAO should begin outreach one month prior to the initial site visit in order to build interest and support for DTS through activities such as the following:

- Demonstrations
- Presentations
- Tradeshows
- Printed and Web-based media

### **8.2.3 LDTA Commitment and Involvement**

The LDTA's involvement is essential to the success of DTS deployment at the site. The LDTA should be knowledgeable, proactive, and willing to carry out the responsibilities of this role. The LDTA is important not only because they will serve as a main point of contact (POC) for the site, but initially will be responsible for supplying the fielder with the site's data; including user profiles, organizational hierarchy, routing, groups, and lines of accounting.

### **8.2.4 Team Coordination Prior to On-Site Setup**

To ensure smooth DTS deployment, it is important that all individuals participating in the fielding effort be involved from the beginning and work together prior to on-site setup. This may include prior meetings and conference calls. All individuals should understand their roles in the process and understand how valuable they are to the team and the overall success of the deployment. The Fielding team, which coordinates efforts at or relating to the site's deployment, should clearly define and coordinate management and setup tactics prior to arrival. The Fielding team, as a whole, will be responsible for the following activities:

- Site Activation
- Hardware and software installation
- Communication
- Administrative setup
- Help desk
- CTO support

## 8.2.5 Information Technology

DTS is a Web-based application that uses DBsign Universal Web Signer (UWS) to allow a user to log in. The system uses DBsign UWS to read the digital certificate on the user's CAC.

In order to use DBsign UWS, Java Runtime Environment (JRE) 1.6 must be downloaded to the user's computer. For information on installing JRE 1.6, select the red button under First Time Users from the DTS Home page ([www.defensetravel.osd.mil](http://www.defensetravel.osd.mil)).

## 8.2.6 CTO Involvement

The travel service provider or CTO provides key information that is required to complete the organization setup in DTS. The CTO must be involved in the Business Process (BP) sessions in order to be aware of changes that will occur in processing travel once DTS is used. It is also important to train CTO personnel so they will know how to process DTS transactions.

## 8.2.7 Training and Customer Support

It is important that the appropriate persons attend the DTA Training classes, as these individuals will be expected to train others. To ensure that the correct individuals are selected, it is recommended that training be conducted after BP and Setup instead of before. When trained after Setup, DTAs will understand the system and their responsibilities more clearly. If an individual is identified as unable to train others, this would be the time to make any necessary changes.

If possible, an additional week should be added to DTS Customer Support. Two weeks of customer support would give the DTAs, Routing Officials (ROs), and travelers more time to receive assistance from the Fielding team.

## 8.2.8 Naming Sequence

A clearly defined naming sequence should be understood and used by the Fielding team. The team should use the Service or Agency Representative as a reference to assess the current naming sequence and advise if any changes should be made. It is important that this be established correctly to prevent the need for reorganization in the future.

## 8.2.9 Planning

Planning, by the site personnel and the Fielding team, should be strongly emphasized and thoughtfully accomplished. A precise timeline will be planned and should be strictly followed. All will need to coordinate with each other prior to and through the implementation. During this time, the Fielding team will coordinate numerous activities such as the following:

- Contact the LDTA to coordinate meetings with appropriate individuals to discuss items such as finance, budgets, routing, IT, and business processes
- Communicate, in detail, all steps in the Fielding process
- Provide all documentation to the site

## 8.2.10 Local Help Desk Operation Procedures

If a site has help desk procedures in place the site should follow the established procedures. However, if a site does not have a help desk, it is strongly recommended that one be established. The focus of the DTS support is to provide a high-level of customer service while handling the problem inquiries at the lowest level. Prior to set up, each site should identify the help desk procedures that it will follow. If procedures are established early, the transition to being fully operable will be a much smoother after the Fielding team leaves.

## APPENDIX A: ACRONYMS AND ABBREVIATIONS

<b>AO</b>	Authorizing Official
<b>CAC</b>	Common Access Card
<b>CBA</b>	Centrally Billed Account
<b>CO</b>	Certifying Officer
<b>COL</b>	Certifying Officer Legislation
<b>CS</b>	Customer Support
<b>CTO</b>	Commercial Travel Office
<b>DADS</b>	Defense Accounting and Disbursing System
<b>DFAS</b>	Defense Finance and Accounting Service
<b>DoD</b>	Department of Defense
<b>DTA</b>	Defense Travel Administrator
<b>DTS</b>	Defense Travel System
<b>DTMO</b>	Defense Travel Management Office
<b>EWTS</b>	Enterprise Wide Training System
<b>FDTA</b>	Finance Defense Travel Administrator
<b>GDS</b>	Global Distribution System
<b>GEX</b>	Global Exchange
<b>IBA</b>	Individually Billed Account
<b>ISP</b>	Initial Site Planning
<b>IT</b>	Information Technology
<b>JRE</b>	Java Runtime Environment
<b>LDTA</b>	Lead Defense Travel Administrator
<b>LOA</b>	Line of Accounting
<b>LPV</b>	Live Process Verification
<b>LRA</b>	Local Registration Authority
<b>ODTA</b>	Organizational Defense Travel Administrator
<b>PAO</b>	Public Affairs Office
<b>PKI</b>	Public Key Infrastructure
<b>PNR</b>	Passenger Name Record
<b>S/A Representative</b>	Service/Agency Representative
<b>TDY</b>	Temporary Duty
<b>TraX</b>	Traveler Explorer

Appendix A: Acronyms and Abbreviations

<b>TO</b>	Transportation Officer
<b>UWS</b>	Universal Web Signer

## APPENDIX B: SITE FIELDING CHECKLIST

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Initial Site Planning (ISP)	Not Started	Identify key players and Defense Travel Administration members	Identify the LDTA, FDTA, and ODTA(s).	1/31/2009	-200	2/20/2009	-180	Site POC		<ul style="list-style-type: none"> <li>• IT POC- Ensures everyone has JRE 1.6 installed (required in order to use DBsign UWS); CAC capabilities and establishes reject e-mail addresses (ex: name PR_DTS@osd.mil)</li> <li>• LDTA – Main site liaison for the implementation and sustainment of DTS</li> <li>• ODTA – Administrator/s at the suborganizational level</li> <li>• FDTA/Budget – Financial and budget POC who assists in how the budgets should be established</li> <li>• PAO POC – Public Affairs point of contact to coordinate outreach and materials</li> <li>• Travel Clerks/NDEAs – Help determine who will need group access</li> </ul>

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
ISP	Not Started	Determine all organizations involved in implementation	Determine if remote personnel should, can, or will use DTS. The following should be considered: 1) Access to Internet (firewall, security accreditation for remote site) 2) JRE, CAC middleware and reader accessibility on laptops, if applicable 3) DTA configuration 4) Servicing CTO connection? * Suggest using organization chart as a reference **If determination is made to include remote personnel based on this, establish procedures for preparing users for DTS.	2/20/2009	-180	3/12/2009	-160	LDTA	Service/ Agency	
ISP	Not Started	Schedule and Conduct ISP meeting	The site POC and key players should customize their implementation plan from the guide provided.	2/20/2009	-180	3/12/2009	-160	Site POC	Identified Site Key Players	
ISP	Not Started	Determine if site has DADs connectivity	Identify the accounting system that the site uses and see if it is interfaced with DTS. Ensure channels are established with GEX.	2/20/2009	-180	3/12/2009	-160			

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Setup	Not Started	Data Import	S/A Rep determines if the site will be built using the Deployment Tool or via the DTA Maintenance Tool. If using the Deployment Tool, the S/A Rep will build the root organization in the Deployment Tool. If using the DTA Maintenance Tool, refer to the DTA Manual.	2/20/2009	-180	3/12/2009	-160	Service/ Agency	LDTA	Site POC or LDTA must contact service or agency
Training	Not Started	Determine and execute training needs. Consider administrators and travelers.	E-Learning Training Resources are accessible within the Travel Explorer (TraX) Training Center. ( <a href="http://www.defense-travel.dod.mil/passport">www.defense-travel.dod.mil/passport</a> ) On-demand, anytime training includes both Web-based training modules and demonstrations. Also listed within the Training Center are the scheduled instructor-led distance learning classes. For on-site (classroom) instructor-led training, contact your respective Service/ Agency DTS service office.	3/2/2009	-170	3/17/2009	-155	LDTA	Service/ Agency	
Business Process Analysis	Not Started	Conduct "As Is" and "To Be" Business Process Sessions to determine site setup	1. "As Is" process flows for travel processes, including authorizations, vouchers, and other processes. 2. Business Process Matrix will outline transportation practices and policies at the site.	3/7/2009	-165	4/11/2009	-130	LDTA	Service/ Agency; Key Players	

Appendix B: Site Fielding Checklist

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
CTO	Not Started	Determine if CTO connectivity will be available for DTS system setup	Determine if CTO connectivity will be available for system setup; or, confirm intention to setup DTS-Tailored (CTO). This is needed to determine which business processes and system configuration will be used to support DTS at the site. Determine if a new contract is needed and PNR validation.	2/20/2009	-180	4/21/2009	-120	LDTA, TO	Transportation Office, Contracting Officer; DTMO Commercial Travel Division	
Business Process Analysis	Not Started	Organizational Setup	With guidance from your service or agency decide on the organization's naming sequence. When determining site's DTS organizational structure keep in mind these questions: 1. How would you like to see reporting? 2. How would you like to budget?	3/12/2009	-160	4/21/2009	-120	LDTA		

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Business Process Analysis	Not Started	Routing List Setup	<p>Discuss the site's existing routing process and identify the steps that are not necessary in DTS.</p> <p>For authorizations, vouchers, and local vouchers, review known information and collect additional information, including the following:</p> <ol style="list-style-type: none"> <li>1. Routing list name(s)</li> <li>2. RO names and SSNs (at least 2 per step)</li> <li>3. Routing sequence</li> <li>4. Special routing lists, i.e., Director's Routing</li> <li>5. Conditional Routing-Foreign Travel/Travel Mode Use.</li> </ol>	4/1/2009	-140	5/1/2009	-110	LDTA	ODTAs	

Appendix B: Site Fielding Checklist

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Business Process Analysis	Not Started	Groups	Groups and group access – Determine personnel who will require access to: <ul style="list-style-type: none"> <li>• Create documents for other personnel (Travel Clerks)</li> <li>• Edit documents for others</li> <li>• Require “any-time” access to documents</li> <li>• Based on group access and Privacy Act requirements, determine how many groups will be required for the organization. Identify the following:                             <ol style="list-style-type: none"> <li>1. Group Name(s)</li> <li>2. Special Membership lists (if necessary)</li> </ol> </li> </ul>	4/1/2009	-140	5/1/2009	LDTA	ODTAs		
Business Process Analysis	Not Started	AOs, COs and TOs must complete required training.	Prior to appointment in writing, all AOs, COs, and TO/CBA Specialists who will certify CBA invoices, access training such as the Training for Accountable Officials and Certifying Officers (TAOCO) course.	4/16/2009	-125	5/11/2009	-100	LDTA	LDTA; All Accountable Officials	<a href="http://www.defensetravel.dod.mil/Docs/Training/Training_for_Accountable_Officials.pdf">www.defensetravel.dod.mil/Docs/Training/Training_for_Accountable_Officials.pdf</a>

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Setup	Not Started	Establish DTS CBAs	Determine if the site will need to use CBAs for travelers who do not have Government Travel Charge Cards (GTCCs). Coordinate with the DTS Service Office POC, Transportation Office and Commercial Travel Office to determine if the site will use a Traditional CBA (reconciled outside of DTS) or the CBA Reconciliation module (reconciled inside DTS). The CBA will need to be requested from the Agency Program Coordinator. See Section 3.2 of the <i>DTS Implementation Guide</i> for more information regarding CBAs.	5/30/2009	-81	6/17/2009	-63	LDTA TO	Service/ Agency, Transportation Office, Citbank	<a href="https://www.defense-travel.dod.mil/Docs/CBA_Account_Load_Worksheet.xls">https://www.defense-travel.dod.mil/Docs/CBA_Account_Load_Worksheet.xls</a>
Business Process Analysis	Not Started	Develop and Publish Business Rules	Review service or agency standard business rules and tailor them based on local travel policies. Engage the Transportation Office and CTO.	3/22/2009	-150	6/20/2009	-60	Site POC	Key Site Players; Service/ Agency or DTMO, Transportation Office	
Setup	Not Started	LDTA reviews introductory material for DTA Deployment Tool	LDTA becomes familiar with DTS Deployment Tool and gets refresh of matter learned in DTA class by reviewing material available through links in the Deployment Tool.	3/22/2009	-150	6/20/2009	-60	LDTA		*Assumes site will use Deployment Tools for Setup
Validation	Not Started	Data Migration	Service/Agency initiates migration of data in the Deployment Tool to the Production Database.	6/15/2009	-65	6/25/2009	-55	Service/ Agency	LDTA	*Assumes site will use Deployment Tools for Setup

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
IT	Not Started	IT Requirements	1. Install JRE on all applicable workstations. 2. Create reject email address to be used on organization's profile.	5/26/2009	-85	6/30/2009	-50	LDTA, IT	IT	For information on installing JRE 1.6, select the red button under First Time Users from the DTS Home page at <a href="http://www.defense-travel.dod.mil">www.defense-travel.dod.mil</a> .
Business Process Analysis	Not Started	Ensure that AOs, COs, and TOs are appointed in writing and signature cards are filed	All AOs and COs must be appointed in writing. DD577 signature cards need to be filed by the site (or sent to DFAS for DTS-Tailored DADS sites) TO/CBA Specialists who will certify CBA invoices do this as well. Templates are in the Financial Field Procedures Guide. Verify that this action is complete.	5/11/2009	-100	7/5/2009	-45	LDTA	LDTA; All Accountable Officials	

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Setup	Not Started	Self-Registration	1. DTAs, RO, and AOs self-register in DTS prior to data being loaded in Production database. Requires completion of organization and routing list data in Deployment Tool. 2. Frequent travelers self-register (after Deployment Tool migration) so they are prepared to travel. Other travelers can register when a need to travel arises or as instructed by their command or ODTA.	5/13/2009	-98	7/10/2009	-40	LDTA	ODTAs, Routing Officials	*Assumes site will use Deployment Tools for Setup
CAC/PKI	Not Started	Card stock, card reader, middleware, software	If using CACs, verify that card stock, readers, and middleware are available or will be available for organizations by IOC. Ensure middleware and readers are tested and approved for use with DTS, if applicable.	5/26/2009	-85	7/10/2009	-40	LDTA, IT POC	IT	
Setup	Not Started	Verify required LOAs, associated organizations for LOA assignment, and assign labels	FDTAs work with individual organization resource managers to verify the LOAs to be included in each organization, and assign labels according to the convention in the <i>Financial Field Procedures Guide</i> .	5/13/2009	-98	7/11/2009	-39	FDTA/BDTA	LDTA, Service/Agency	<a href="http://www.defensetravel.dod.mil/Docs/Training/Financial_Field_Procedures_Guide.pdf">http://www.defensetravel.dod.mil/Docs/Training/Financial_Field_Procedures_Guide.pdf</a>

Appendix B: Site Fielding Checklist

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Manage	Not Started	Draft Proliferation Plan	Site to provide a notional Proliferation Plan for all organizations involved in the fielding effort. This plan will establish priority for Setup, BP Sessions, Training, etc. It must be reasonably solid, yet is subject to change.	5/11/2009	-100	7/20/2009	-30	LDTA	Key Site Players	
CAC/PKI	Not Started	Develop and execute CAC/PKI implementation Plan.	Determine whether site will use CAC or PKI digital signature removable media. Incorporate plan to get PINs reset as applicable, if a major issue. Schedule issuance as applicable in accordance with Proliferation Plan.	5/21/2009	-90	7/20/2009	-30	L:DTA, LRA	LDTA, LRA, Service/Agency	
Setup	Not Started	Organization Data Setup in Deployment Tool	LDTA, working with appropriate site personnel(e.g., ODTAs and FDTAs), creates organization shell data (organizations, routing lists, groups, LOAs).	5/13/2009	-98	7/29/2009	-21	LDTA	ODTAs	*Assumes Site will use Deployment Tools for Setup
Manage	Not Started	Help-Desk Setup	Verify local help desk is operational. All help desk personnel (DTAs) are setup with Travel Explorer (TRAX) access.	6/25/2009	-55	7/29/2009	-21	LDTA		
Validation	Not Started	Budgets	Ensure FDTA has established budgets to enter into DTS.	6/25/2009	-55	8/4/2009	-15	FDTA/BDTA	LDTA	

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Validation	Not Started	Groups	Ensure that Global Group Membership Rules are established. This will allow travel clerks and NDEAs to access travelers.	6/25/2009	-55	8/4/2009	-15	LDTA		
Validation	Not Started	Permissions	Assign Permission levels to all applicable personnel.	7/25/2009	-25	8/4/2009	-15	LDTA	Service/ Agency	
LPV	Not Started	Coordinate LPV scenarios with all key players	Ensure all LPV scenarios are developed; if live travel will be used, ensure that travelers with TDY requirements have been chosen, and the appropriate ROs are involved in the LPV as well. All key players must have PKI/CAC and JRE on the applicable machine(s).	8/1/2009	-18	8/5/2009	-14	LDTA	CTO, Service/ Agency; Key Players	
LPV	Not Started	Assign budgets to LOAs according to Proliferation Plan.	Ensure that FDTA has established budgets to enter into DTS (for initial organizations coming up on IOC/participating in LPV at a minimum). Additional budget targets can be entered by the site at a later date, if desired.	8/4/2009	-15	8/7/2009	-12	FDTA/ BDTA	LDTA, ODTAs	

Appendix B: Site Fielding Checklist

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
LPV	Not Started	Pre-LPV	<ul style="list-style-type: none"> <li>Identify LPV traveler</li> <li>Coordinate LPV date with CTO, Service/Agency; Key Players</li> <li>Ensure that ROs are prepared and have permissions</li> <li>Ensure targets are loaded in the budget</li> </ul>	8/4/2009	-15	8/9/2009	-10	LDTA	CTO, Service/ Agency; Key Players	
LPV	Not Started	LPV	<p>Effective system verification requires testing CTO queues and validation that reject e-mail works properly.</p> <ul style="list-style-type: none"> <li>Run a scenario with dates at least 1 month out of your testing date. This will test the inbound, outbound, and cancellation queue, while verifying routing lists and accounting obligation</li> <li>Process a document with a bad LOA with no CTO reservations in order to force a reject email</li> <li>If possible process a local voucher. This must be a real scenario, as you can not cancel a local voucher.</li> <li>Use a LPV tracking sheet</li> </ul>	8/9/2009	-10	8/14/2009	-5	LDTA	CTO, Service/ Agency; Key Players	
LPV	Not Started	Post LPV	<ul style="list-style-type: none"> <li>Ensure cancellation of any test scenarios</li> <li>Track and reset the budget to the actual targets</li> </ul>	8/14/2009	-5	8/14/2009	-5	LDTA	CTO, Service/ Agency; Key Players	

SITE FIELDING PLAN										
Functional Category	Status	TaskName	Task Description	Recommended Start Date	Start	Recommended Finish NLT Date	Finish	Owner	Coordination With	Comments
Manage	Not Started	Conduct status Meetings	Suggested Action: Conduct Weekly Fielding status update throughout the fielding process via weekly teleconference, meetings, reports etc.	1/31/2009	-200	9/18/2009	30	Site POC	Key Players	

## APPENDIX C: DTS DEPLOYMENT TOOL

### C.1 Overview of the DTS Deployment Tool

The Defense Travel System (DTS) Deployment Tool provides authorized users with an environment where all the site's data can be entered, validated and submitted for upload into the system. This environment, called *Staging*, is separate from the live DTS environment, called *Production*.

The Deployment Tool assists in creating the following administrative setup data for a site or organization:

- Organizational structure
- Routing lists
- Groups
- Lines of accounting (LOAs)
- Administrator

#### C.1.1 The DTS Site Setup Process

All Deployment Tool users should be familiar with the *Defense Travel Administrator's (DTA) Manual* and should refer to it when questions arise concerning the functionality of DTS. This manual can be downloaded from the following Web site: [www.defensetravel.dod.mil/site/training.cfm](http://www.defensetravel.dod.mil/site/training.cfm).

#### C.1.2 Deployment Tool Functions

The following sections describe how the DTS interface is used to set up a site.

##### C.1.2.1 Site Setup Admin

The Service or Agency Representative with permission level 7 selects the Administrative drop-down list from their DTS User Welcome screen.

Site Setup Admin may be used to perform the following tasks:

- Establish a site (e.g., Camp Swampy, Virginia)
- Designate the root organization(s) at a site
- Identify the Lead Defense Travel Administrator (LDTA) for each root organization

Once the Service or Agency Representative has accomplished these tasks, the LDTA can log on to DTS from the DTS Home page and access Self-Registration, Site Setup Interview, and Self-Registration Admin.

##### C.1.2.2 Site Setup Interview

Site Setup Interview enables the LDTA to coordinate the administrative setup of the site or root organization, create the organizational structure, and identify Organizational Defense Travel Administrators (ODTAs) to assist with setup. The LDTA and ODTAs then perform the following tasks:

- Enter information for Routing Officials (ROs)
- Create routing lists
- Create routing list details
- Name groups
- Create Global Group Membership Rules (GGMRs)
- Create subordinate organizations (suborganizations)
- Create or upload LOAs into the Staging environment

There is no permission level control to access Site Setup Interview. Site Setup Interview allows tasks to be accomplished in two separate modes: the Interview Mode and the Edit Mode.

*The Interview Mode* guides inexperienced DTAs through setup. The interface leads the DTA through setup of organizations, routing lists, groups, and LOAs. Each step is explained in detail on the screen with links to other documentation.

*The Edit Mode* allows experienced DTAs to make changes or quickly build structures in a less restrictive manner.

Both modes allow common information for organizations, routing lists, groups, and LOAs to cascade to subordinate organizations.

When the site setup administrative data have been completed, the LDTA submits the organizations to the Service or Agency Representative. The Service or Agency Representative reviews and approves the migration of the data into the live Production environment. After the data have been accepted into Production, the DTA Maintenance Tool will be used to make any changes to the data.

### **C.1.2.3 Self-Registration Admin**

Self-Registration Admin allows the DTA to assign permissions and access to new DTS users. Access to Self-Registration Admin is granted to DTAs who have organization access and permission level 5.

### **C.1.2.4 Self-Registration**

DTS Self-Registration allows DTAs and ROs who currently have no profile in DTS to register using the Deployment Tool, so that their profile will be entered into Staging.

## C.2 DTS Deployment Process

The Deployment Tool activities are part of a process that is classified into three stages: Prestaging, Staging, and Production (Figure C.2-1).

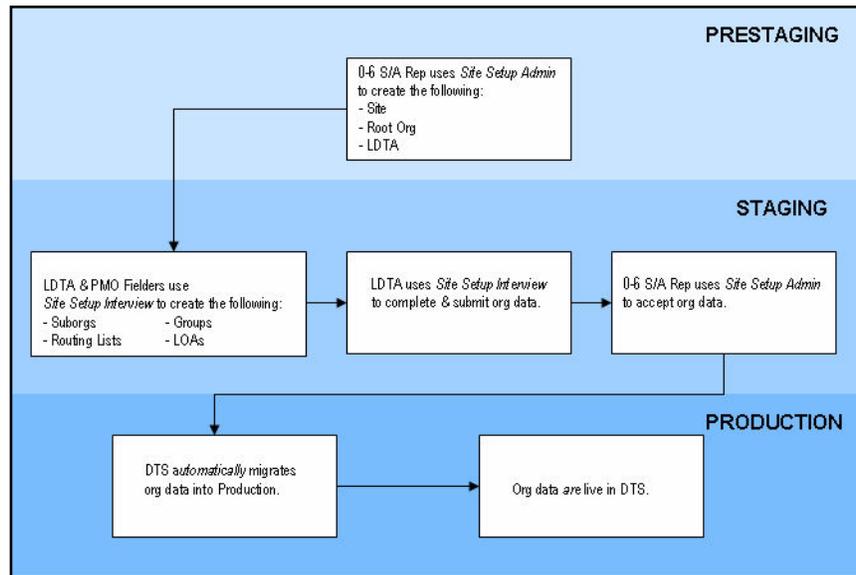


Figure C.2-1: DTS Deployment Process

The activities listed in Table C.2-1 must occur in the Deployment Tool in order to complete the organization administrative setup properly. Although there are many ways to combine the steps, and specific procedures may vary by command, these steps will assist users in accomplishing site setup efficiently and effectively.

**Note:** There are many planning activities that must occur to bring a site to initial operating capability (IOC). The Service or Agency Representative and LDТА are generally responsible for planning and gathering data. The following documents are available for guidance:

- *DTA Manual*
- *Implementation Guide*
- *Site Fielding Checklist* (Attachment B of the *Implementation Guide*)

Table C.2-1: Site Setup Required Activities

SITE SETUP REQUIRED ACTIVITIES			
STEP	USER	ACTIVITY	SECTION
INITIAL S/A REPRESENTATIVE ACTIONS			
1	S/A Rep	Obtain necessary site and root organization data.	N/A
2		Create the new site.	2.1.1
3		Create root organization.	2.1.2
4		Create LDТА.	2.1.3
LDТА AND ODTA TASKS IN INTERVIEW MODE			
5	LDТА, ODТА	Create suborganizations for root organization.	3.1
6		Identify ODTAs to assist with setup. <i>Note: ODTAs can log on to DTS (Staging) to assist with their organizations and suborganizations.</i>	3.2.1
7		Create or upload routing lists.	3.3
8		Add ROs.	3.3.2
9		Create or upload routing list details.	3.3.3
10		Create groups, group structures, and GGMRS.	3.4
11		Create or upload LOAs.	3.5.1
12		Review organization setup.	5.1
13		Complete organization setup.	5.2
SELF-REGISTER ALL OFFICIALS PRIOR TO MIGRATION TO PRODUCTION			
14	LDТА	Self-registers and notifies S/A Rep.	6.1
15	S/A Rep	Accept LDТА's self-registration.	6.2
16	ODТАs, ROs, AOs	Complete self-registration. <b>Note:</b> This must occur prior to migration from Staging to Production. If not, a user profile will migrate and the LDТА will have to complete the traveler profile in the DТА Maintenance Tool. The user must update the user preferences.	6.3
17	LDТА	Accepts self-registration.	6.4
18	DTAs	Complete and accept their own self-registrations. Update user preferences.	Chapter 6 intro
SUBMISSION			
19	LDТА	Submit organization setup to the S/A Representative.	7.1
S/A REVIEW AND APPROVAL, AND DATA MIGRATION			
20	S/A Rep	Review organization setup.	7.2
21		Approve or reject organization setup. Data must be approved before they can migrate to Production.	7.2, 7.3
POST-MIGRATION ACTIVITIES			
22	LDТА	Complete GGMR for groups belonging to higher-level organizations.	8.1

Table C.2-1: Site Setup Required Activities (continued)

SITE SETUP REQUIRED ACTIVITIES			
POST-MIGRATION ACTIVITIES			
23	New User	Complete self-registration.	8.2
24	DTA	Accept new user in Self-Registration Admin.	8.3

## C.2.1 Service and Agency Representative Initial Tasks

Only users who have permission level 7 may access Site Setup Admin. Site and root organization setup and creation of a site's LDTA must be coordinated between the Service or Agency Representative and the site point of contact (POC), usually the LDTA. Setup begins at the service or agency level with the use of Site Setup Admin to enter a new site into the DTS site table. The Service or Agency Representative creates the root organization for that site and assigns the LDTA.

The LDTA will be permitted to log on to the root organization in Site Setup Interview. The LDTA may then designate ODTAs and use Site Setup Interview to enter the new site information.

**Note:** In Site Setup Admin, users are directed to log on to DTS Staging in order to use the Deployment Tool. Other standard DTS capabilities are blocked until organizations are moved to production. While the users designated in the Deployment Tool (DTAs, ROs, and Authorizing Officials [AOs]) have access to the Self-Registration feature, they should not use it until their user profiles are created. This will occur prior to migration of the setup data and is explained later in this process.

**Note:** The Service or Agency Representative should coordinate the schedule with the Defense Travel Management Office (DTMO) to ensure CTO validation scheduling and availability of CTO data elements for initial organization creation (See Section C.2.1.2). The Travel Assistance Center (TAC) should be aware of the planned IOC date to ensure Live Process Verification (LPV) support.

**Note:** A DTS user can only be designated as the LDTA for one root organization at a time.

### C.2.1.1 Create a New Site

A site in DTS is a geographic location that identifies a collection of main organizations. A site may consist of organizations from a single service or agency or may consist of many, as in a Joint Command. Typically, this collection of main organizations would be an installation. Some examples are as follows:

- Camp Pendleton
- Fort Campbell
- Wright-Patterson Air Force Base (AFB)
- Norfolk Naval Base

As part of the initial setup, the Service or Agency DTA creates the new site by using the DTS Deployment Tool. Follow the below steps to create a new site in DTS:

1. Log on to the DTS User Welcome screen.
2. Select **Administrative** from the menu bar.

3. Select **Site Setup Admin** from the drop-down list.

The Deployment Tool Process screen opens.

4. Read the Deployment Tool process.

5. Select **Begin**.

The Select Organization drop-down list will display if the user has access to multiple organizations.

6. Select the **Organization** drop-down list arrow and select the appropriate organization.

The site list screen opens.

7. Select the **Create New Site** link if the site does not display in the site list.

The Create New Site screen opens (Figure C.2-2).

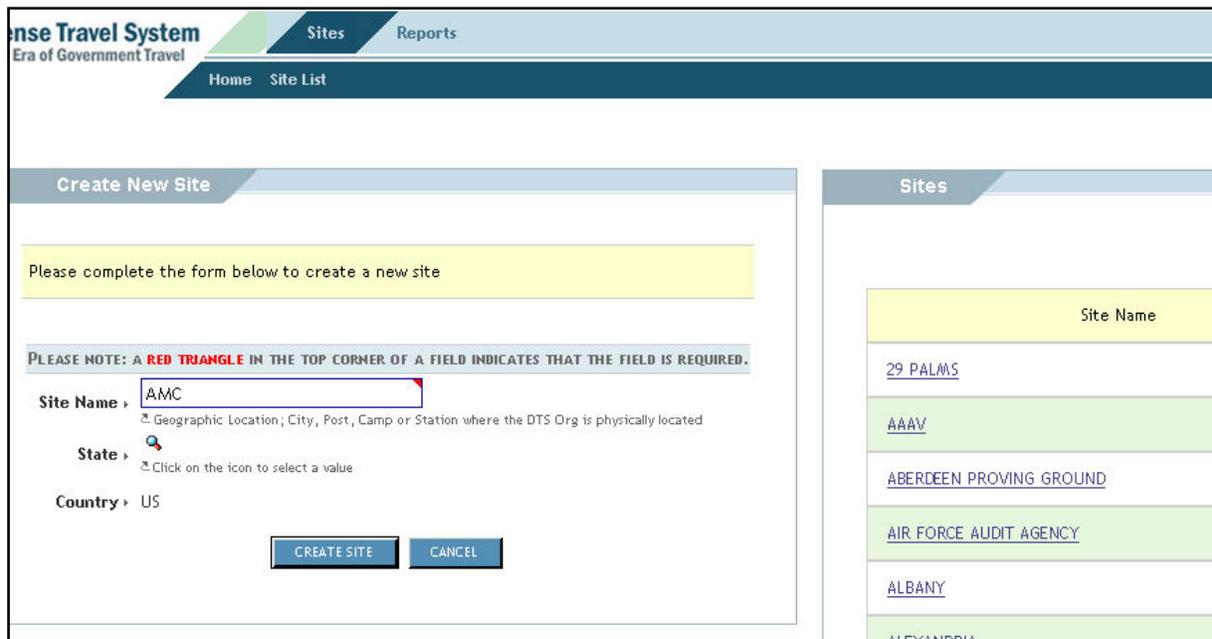


Figure C.2-2: Create New Site Screen

8. Complete the **Site Name** field.
9. Select the **magnifying glass** icon to search for the site **state**.

The State/Country Search screen opens.

10. Select the radio button that best describes the location for which to search, if necessary

11. Complete the **Code** field with the postal abbreviation of the state or country.

-OR-

Complete the **Name** field with the name of the state or country.

12. Select **OK**.

The Create New Site screen refreshes with the name or abbreviation of the state or country.

13. Select **Create Site**.

The screen refreshes. It displays a message in the left box informing the user that the new site has been created.

14. Select **CONTINUE**.

-OR-

Select the **Yes** radio button, then **CONTINUE** if it is necessary to create another site. The Create New Site screen opens.

To edit the spelling of a site, select **Edit** in the site list, make the correction in the Site Name field of the Edit A Site box, and select **SAVE**. To delete a site name, select **Delete** in the site list and then select **DELETE** in the Delete A Site box.

**Note:** A site with organizations associated with it cannot be deleted. The association must be removed before the site can be deleted.

### C.2.1.2 Create a Root Organization

The term *root organization* has the same meaning as *main organization*, which is used in other parts of DTS. The Deployment Tool uses the term *root organization*. A site can contain multiple root organizations. The root organization is established in DTS at the service or agency level. This is required before LDTA personnel can be assigned. After initial contact and follow-up interview with the site POC, the Service or Agency Representative can create the root organization(s) within their organization access. Follow the below steps to create a new root organization in DTS:

1. Log on to the DTS User Welcome screen.
2. Select **Administrative** from the menu bar.
3. Select **Site Setup Admin** from the drop-down list.

The Deployment Tool Process screen opens.

4. Read the Deployment Tool process.
5. Select **Begin**.

The Site List screen opens.

6. Select the **site** to which the new root organization will be added.

7. Select **Create New Root Organization** if this site requires a new root organization (Figure C.2-3).

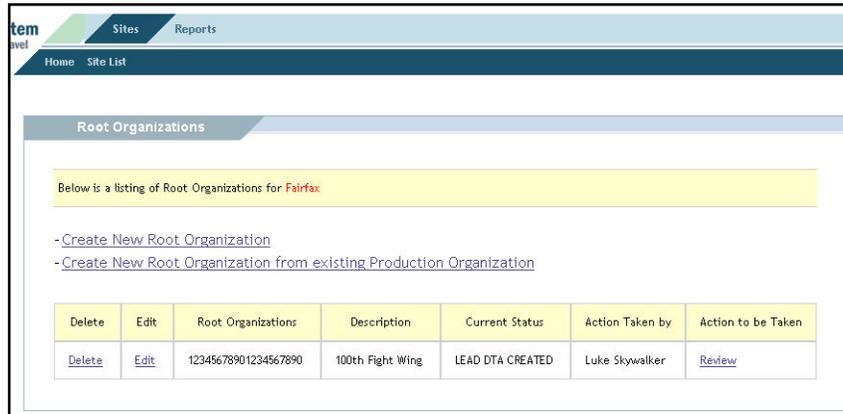


Figure C.2-3: Root Organizations Screen

The Create Root Organization screen opens (Figure C.2-4). The red triangle in the top right corner of a field indicates that the field is mandatory.

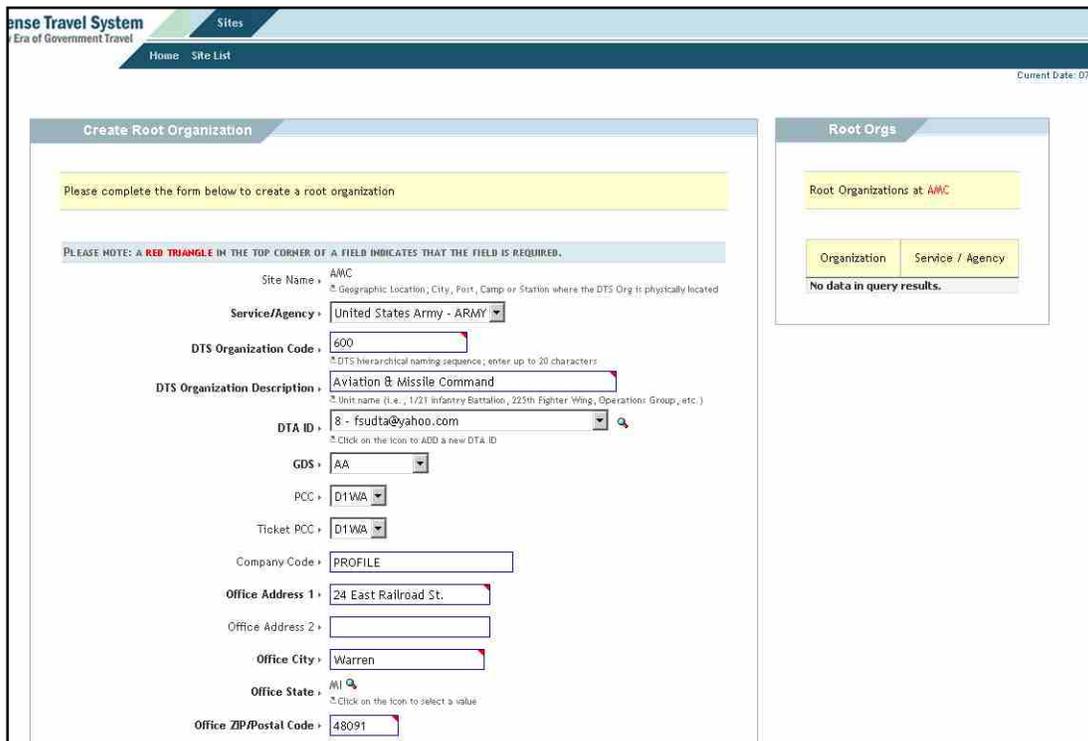


Figure C.2-4: Create Root Organization Screen

8. Select the **Service/Agency** drop-down list arrow and select the correct value.
9. Complete the **DTS Organizational Code** field.

This is the organization name from the organization hierarchy naming sequence. (See *DTA Manual*, Appendix Q.)

10. Complete the **DTS Organization Description** field.

This is the name by which the organization is commonly called.

11. Select the **DTA ID** drop-down list arrow and select the correct value.

-OR-

Select the **magnifying glass** icon to add a new DTA ID to the drop-down list.

The DTA ID is the e-mail address to which the DTS reject notices will be delivered.

12. Select the **GDS** (Global Distribution System) drop-down list arrow and select the correct value.

The PCC (Pseudo City Code), Ticket PCC, and Company Code fields display. The CTO will provide the information needed to populate these fields.

13. Complete the **Office Address 1** field.

14. Complete the **Office City** field.

15. Complete the **Office State** field by selecting the **magnifying glass** icon and entering the state code.

16. Complete the **Office Zip Postal Code** field with a ZIP or postal code that is valid for the city in which the office is located.

17. Complete the **Organization E-mail Address** field.

This is the e-mail address that DTAs will use to receive submitted Self-Registrations. This email address should be accessible to multiple users.

18. Complete the **Emergency Contact Name** field.

This should be the emergency contact for the duty office.

19. Complete the **Emergency Contact Phone** field.

20. Complete the **Office Phone Number** field.

21. Complete the **Unit ID** field.

The DTA for each organization should know the Unit ID.

22. Select **Save**.

23. Select **CONTINUE**.

-OR-

Select the **Yes** radio button, then **CONTINUE** if it's necessary to create another root organization.

24. Select **Create New Root Organization from existing Production Organization** if a root organization has already been created for the site and the data from that organization can be used to build the new root organization.

The Select Production Organization screen opens (Figure C.2-5). Use this screen to allow the data that were used to create the chosen Production organization to autopopulate into the new root organization fields.

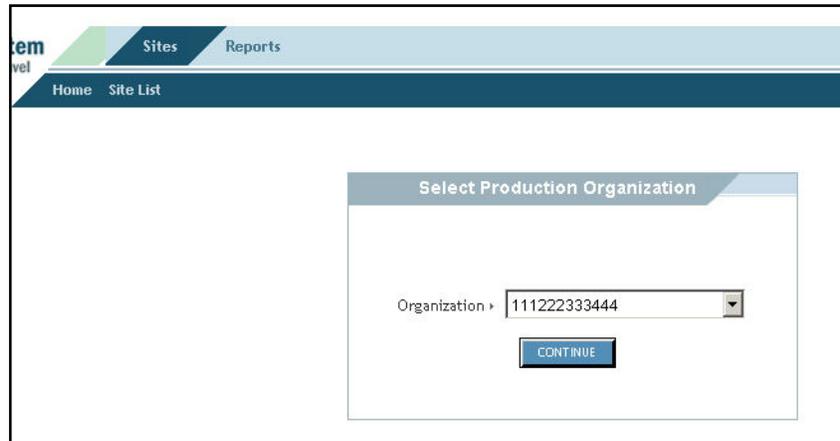


Figure C.2-5: Select Production Organization Screen

25. Select the **Organization** drop-down arrow and select the **organization** in Production to create the new root organization.

The drop-down list will be populated with organizations that are already in Production and to which the DTA has access.

26. Edit the **fields** that have populated, where allowed.
27. Complete the blank **fields**.

### C.2.1.2.1 Delete a Root Organization

All elements associated with the organization (e.g., organizations, DTAs, users, routing lists, groups, and LOAs) must be deleted before the root organization can be deleted. A warning will display on the Delete a Root Organization screen if there are any elements associated with the organization.

Follow the below steps to delete a root organization:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** from the menu bar.
3. Select **Site Setup Admin** from the drop-down list.
4. Select **Site List** from the subnavigation bar.
5. Identify the name of the **site** that owns the organization to be deleted.
6. Select the **site name** in the Site Name column.

The Root Organizations screen opens (Figure C.2-6).

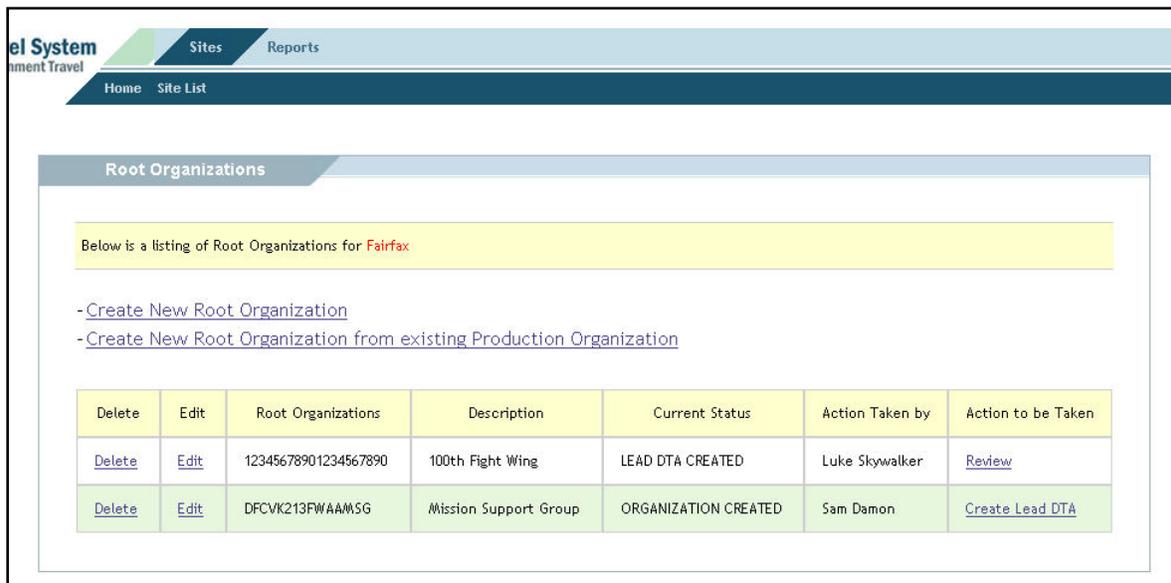


Figure C.2-6: Root Organizations Screen

7. Select **Delete** to the left of the root organization name.
8. Confirm that the organization is the correct one for deletion.
9. Select **Delete**.

If any elements associated with the organization remain, the Delete a Root Organization screen will display an alert (Figure C.2-7).

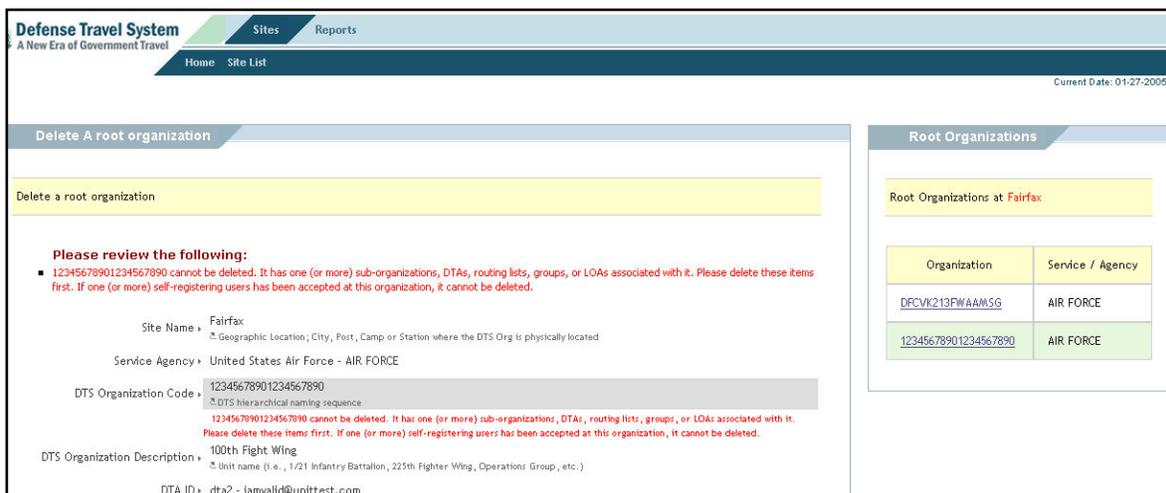


Figure C.2-7: Delete a Root Organization Screen

### C.2.1.2.2 Delete an Organization

To delete an organization, you must first find the site to which it belongs. Follow the below steps to delete an organization:

1. Access the Site List screen.
2. Identify the name of the **site** that owns the organization to be deleted.
3. Select the **site name** in the Site Name column.

A list of organizations belonging to the selected site displays on the Root Organizations screen.

4. Identify the organization to select for deletion.
5. Select **Delete**.  
-OR-  
Select **Cancel** to open the Site List screen without deleting the site.

### C.2.1.2.3 Delete a Site

A site can be deleted only after all of its elements (e.g., organizations, groups, routing lists, and LOAs) are removed. A site that has any elements associated with it cannot be deleted. Follow the below steps to delete a site from DTS:

1. Access the Site List screen.
2. Select **Delete** next to the name of the site to be deleted.

The Delete a Site screen opens (Figure C.2-8).

Site Name	State/Country
<a href="#">.23 Release site</a>	VA, US
<a href="#">DTS-West</a>	VA, US
<a href="#">Fairfax</a>	VA, US
<a href="#">Marty's .23 Test Site</a>	VA, US
<a href="#">PTP Test Site</a>	VA, US
<a href="#">Pre-Deployment Tools</a>	VA, US
<a href="#">Release23</a>	VA, US

Figure C.2-8: Delete a Site Screen

3. Verify that the correct site is selected for deletion.
4. Select **Delete**.  
-OR-  
Select **Cancel** to open the Site List screen without deleting the site.

### C.2.1.3 Create an LDTA

The LDTA is the primary POC for any root organization. There may be more than one LDTA designated for a single root organization. The LDTA may be responsible for the implementation and administration of DTS. This includes the following tasks:

- Creation and maintenance of organizations
- Assignment of ODTAs
- Management of the organizations and their routing lists, groups, and LOAs.

Follow the below steps to create an LDTA for a root organization:

1. Log on to the DTS User Welcome screen.
2. Select the **Administrative** drop-down list and select **Site Setup Admin**.
3. Select **Site List** on the subnavigation bar.
4. Select the **Site Name** to which the new LDTA will be added.

The Root Organizations screen opens (Figure C.2-9).

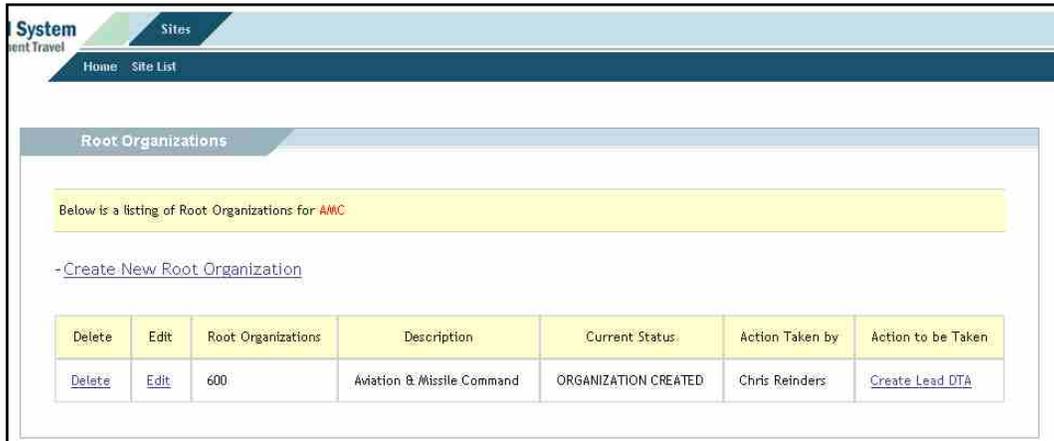


Figure C.2-9: Root Organizations Screen

5. Select **Create Lead DTA**.
6. Enter the LDTA's Social Security Number.
7. Select **ADD**.

The Create LDTA screen opens (Figure C.2-10).

The screenshot shows the 'Create LDTA' screen with a navigation bar at the top containing 'Organization', 'Administrator', 'Routing List', 'Group', 'LOA', and 'Submit'. Below the navigation bar is a dark blue header with 'Interview Mode' and 'Edit Mode'.

The main content area is divided into two columns. The left column contains a yellow banner that says 'Add a DTA for Aviation & Missile Command'. Below this is a section titled 'ENTER THE DTA'S PERSONAL INFORMATION:' with the following fields:
 

- Last Name: MONROE-AV
- First Name: CHRIS
- Middle Initial: (empty)
- Email: fsudta@yahoo.com
- SSN: 234555AAV

Below the personal information is a section titled 'ENTER THE DTA'S PRIVILEGES:' with a warning: 'THESE PRIVILEGES APPLY TO THE DTA FOR SITE SETUP INTERVIEW ONLY AND HAS NO AFFECT ON THEIR DTS USER PRIVILEGES. IF A PRIVILEGE IS SET TO 'N', THE DTA WILL NOT HAVE ACCESS TO THAT MODULE WHEN THEY LOG INTO SITE SETUP INTERVIEW.' This section contains four radio button options:
 

- Update Organization: YES (selected), NO
- Update Group: YES (selected), NO
- Update Route: YES (selected), NO
- Update LOA: YES (selected), NO

At the bottom of the left column is a section titled 'DELEGATE THE DTA TO ORGANIZATION:' with a dropdown menu for 'Delegated Organization' set to '600620'. There are 'SAVE' and 'CANCEL' buttons at the bottom.

The right column is titled 'Current Organization' and contains a yellow banner for 'Aviation & Missile Command'. Below this is a table with two columns: 'DTA Name' and 'Delegated Organization'.
 

DTA Name	Delegated Organization
Reinders, Chris B.	600
Brown-AV, Eric	600

Figure C.2-10: Create LDTA Screen

8. Populate the fields with the required information.
9. Select the **Yes** radio buttons in the Enter the DTA's Privileges section if the new DTA will need to view or edit organizations, groups, routing lists, or LOAs.
10. Select **Save**.

The Root Organization Lead DTA screen opens to confirm that the LDTA has been created. To create another LDTA as an alternate LDTA, select **Yes**.

11. Select **Continue**.

**Note:** The LDTA has access to all Deployment Tool functions – Organizations, Routing Lists, Groups, and LOAs.

12. Inform the LDTA that their profile has been entered into DTS and the Site Setup Interview Tool is now available.

## C.3 Site Setup Interview: The Interview Mode

There are two modes available within Site Setup Interview: the Interview Mode and the Edit Mode. This section describes the Interview Mode. A brief description of the Edit Mode is provided in Section C.4. Once the Service or Agency Representative has designated a LDTA, the LDTA is notified and can begin site setup using Site Setup Interview to access the Interview Mode.

Below is a list of LDTA tasks:

- Identify and create ODTAs
- Create routing lists
- Identify ROs and AOs
- Create routing list details
- Name groups and create GGMRs
- Enter or upload LOAs
- Review organization setup
- Complete organization setup

### C.3.1 Create Suborganizations

All suborganizations will be created based on the naming sequence of the root organization. Organization structures in DTS vary and are dependent on the needs of the site. Consult with the Service or Agency Representative and the *DTA Manual*. The LDTA may create ODTAs to complete setup for some or all of the suborganizations. LDTAs also may serve as ODTAs. This is a point of discussion for the Business Process (BP) sessions.

Follow the below steps to create a suborganization:

1. Log on to DTS.
2. Read the Privacy and Ethics statement and select **Accept**.

If the account has not been activated, the User Activation screen will open (Figure C.3-1). If the account has been activated, the DTS User Welcome screen will open.

**Defense Travel System**  
A New Era of Government Travel

### User Activation

**Your user account needs to be activated**

If you would like your account activated, complete the form below. The form requires that you enter your social security number twice. **Please enter your SSN exactly as it appears in your profile, including any trailing characters (i.e. 123456789 or 987654321R)**

Enter Social Security Number:

Reenter Social Security Number:

If the values entered match an account in DTS , you will automatically be logged in.

Selecting the "Cancel" button will terminate the activation process.

Figure C.3-1: User Activation Screen

3. Complete the two **Social Security Number** fields.
4. Select **Submit**.

If there is no profile in DTS, the user will be prompted to self-register. Follow the screen prompts to self-register. When this is complete, the DTS User Welcome screen opens.

If a profile already exists in DTS, the DTS User Welcome screen opens.

1. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
2. Select the **Organization** link in the navigation bar.

The Select Organization Screen opens (Figure C.3-2).

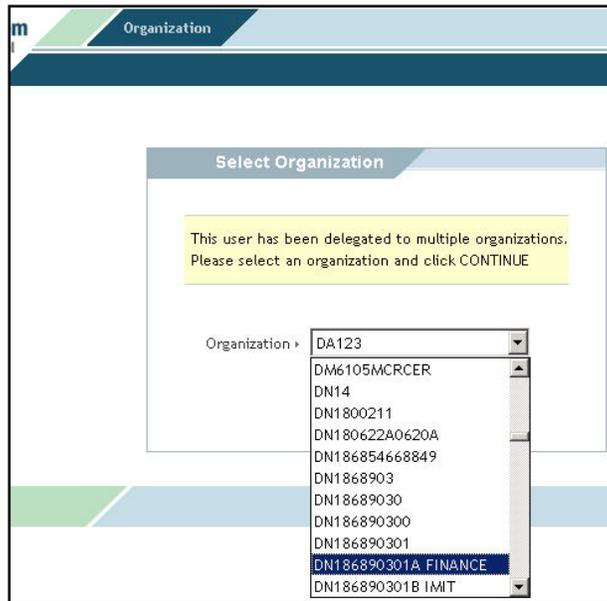


Figure C.3-2: Select Organization Drop-Down List

3. Select the **organization** to be edited.
4. Select **Continue**.
5. Read the overview displayed on the Site Setup Interview screen.
6. Select **Begin** at the bottom of the page.
7. Select the **Yes** radio button to create a new suborganization for the organization name displayed in red.

The Create Sub-Organization screen opens.

8. Complete the **DTS Organization Description** field. Populate the required fields. Some of the fields will automatically fill with cascaded data from the root organization.
9. Complete the **DTS Organization Code** field. Notice the root organization code shown to the left of the field. Add only the code for the suborganization.
10. Update other fields as necessary.
11. Repeat until all organizations have been added.

**Note:** The Site Setup Tool will cycle through each suborganization created. The tool will ask the user if a new suborganization should be added. This will continue until the Site Setup Tool has cycled through all suborganizations.

Once the user has finished entering all suborganizations for the established root organization, a Congratulations screen displays to confirm that the user has completed the organization structural setup.

### C.3.2 Create Local DTS Officials

To be recognized in the Deployment Tool, a designated user in Site Setup Admin must enter data for all personnel who will be using DTS at their site. After creating the organizations, the LDTA then creates other officials necessary to complete the site setup. To enter ODTAs, the LDTA must have organization privileges. The LDTA must have routing list privileges to enter ROs and AOs.

#### C.3.2.1 Identify ODTAs

The ODTA is the primary POC for suborganizations. ODTAs have numerous responsibilities, examples are shown below:

- Implement and administer DTS at their respective levels
- Create and maintain organizations, routing lists, groups, and LOAs
- Identify ROs, finance and budget officials, and resources to assist in administering DTS.

Follow the below steps to create an ODTA for an organization:

1. Log on the DTS User Welcome Screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Administrator** from the navigation bar.
4. Read the overview.
5. Select **Begin** at the bottom of the screen.
6. Select the **Yes** radio button to create a DTA for the selected organization.  
-OR-  
Select **No** to proceed until the desired organization is reached.

The left side of the screen asks if more DTAs are desired for each organization. The right side of the screen displays the names of the DTAs who have been created for each organization (Figure C.3-3).



Figure C.3-3: Add DTA Screen

7. Select **CONTINUE**.

If the **Yes** radio button was selected, the Enter DTA SSN screen opens.

8. Complete the **SSN** field for the selected DTA.
9. Select **ADD**.

The screen refreshes. It displays fields in which to enter the new ODTA's name, e-mail address, and the list of privileges from which to select.

10. Complete the **Name** and **E-mail** fields.
11. Assign privileges using the radio buttons.

Typically, ODTAs are given privileges for organizations, routing lists, and groups, and the Finance DTA (FDTA) is given permission for LOAs.

12. Select the **Delegated Organization** drop-down list arrow and select the **organization** in which to place the DTA.

This allows organization access to suborganizations in the Deployment Tool Site Setup Interview only.

13. Select **SAVE**.

**Note:** If the user is already in Production, the personal information will prepopulate.

### C.3.3 Create Routing Lists

Routing lists establish the steps, sequence, and work flow for the electronic processing of travel documents in DTS. Each routing list identifies the signature authority for the review and approval of all authorizations, vouchers from authorizations (vouchers), and local vouchers. Each organization must have at least one routing list but may have multiple routing lists.

The Deployment Tool creates routing lists in a three-step process:

*Step 1.* It prompts the DTA to cycle through each organization to create as many routing lists as necessary for each organization.

*Step 2.* It cycles through each organization to create or add ROs as are needed for each organization.

*Step 3.* It cycles through each organization to add as many routing list details as needed for each routing list in each of the organizations.

#### C.3.3.1 Name Routing Lists

The Deployment Tool prompts the user to name or add each routing list for all organizations created. Follow the below steps to name a routing list:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** from the navigation bar.
4. Read the Routing List Information screen for guidance concerning routing lists.
5. Select the Routing Lists link located in the Spreadsheet Templates for Download of this screen.

6. Select **Begin**.

The Upload Routing List(s) screen displays.

7. Select the **Yes** radio button and **Continue**.

This will upload a populated worksheet template to the Deployment Tool. If no upload worksheet exists, select **No** and proceed to Step 12.

The Upload Routing List File Browse screen displays (Figure C.3-4).

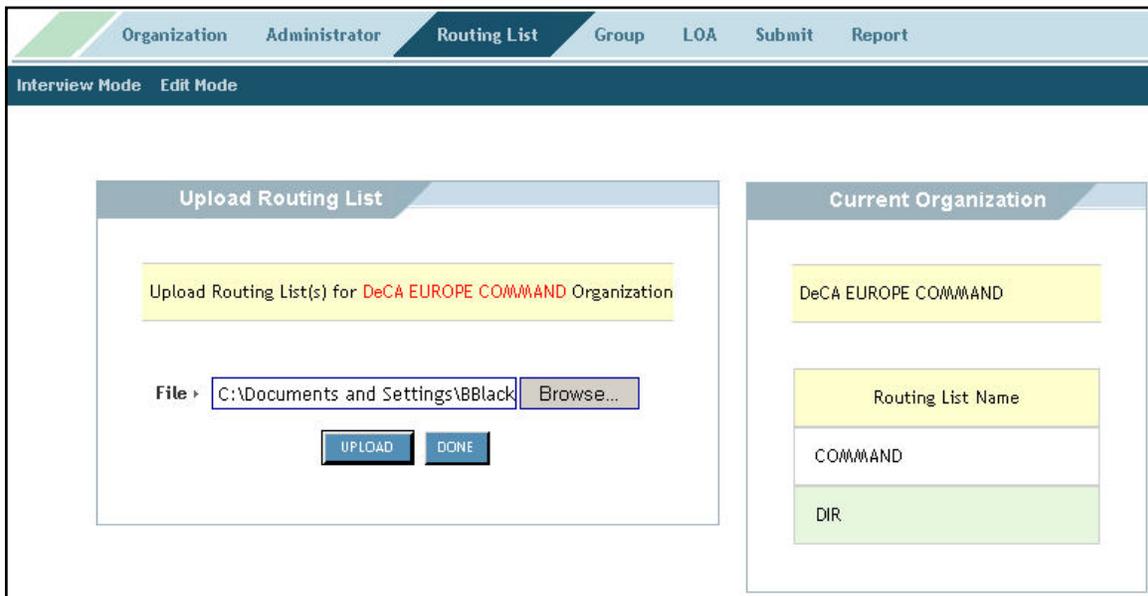


Figure C.3-4: Upload Routing List Browse Screen

8. Select **Browse** to find and select the saved routing list template.

9. Select **UPLOAD**.

This populates the Deployment Tool with the routing lists.

10. Select the **Yes** radio button to create a routing list for the selected organization, if needed.

-OR-

Select the **No** radio button to proceed to the next organization until the desired organization displays.

11. Select **Continue**.

The Site Setup Tool will cycle through each organization asking if a new routing list should be added. This will continue until it has cycled through all suborganizations.

12. Complete the **Routing List Name** field on the Create Routing List screen if **Yes** was selected.

13. Select the **Yes** radio button to allow the routing list to be automatically copied and the data to cascade to the created suborganizations.  
-OR-  
Select the **No** radio button to create the routing list for this organization only.
14. Select **Save**.
15. Select **OK** to cycle through to the next organization to create a routing list, then select the **Yes** radio button.
16. Select **Continue**.

**Note:** Once routing lists are named, the ROs and routing details are added. The Copy Routing Lists screen opens, allowing the user to copy routing lists from the root organization. Examples include the Honor Guard and Funeral Detail routing lists that may be used in every suborganization.

### C.3.3.2 Add ROs

After creating routing lists, the user will add ROs by name and SSN to DTS and assign them to an organization. Beginning on the Site Setup Interview screen, follow the below steps to add ROs to each organization's routing list:

1. Select **Routing List** on the navigation bar.
2. Select **BEGIN**.

After the user names (creates) routing lists for the root organization and suborganizations, the screen asks if the user would like to add a Routing List Official for the desired organization (Figure C.3-5).

Figure C.3-5: Add Routing List Official Screen

3. Select the **Yes** radio button.
4. Select **Continue** until the Deployment Tool cycles through all of the routing lists created for each organization.

5. Enter the RO's **SSN** if the **Yes** radio button was selected in Step 3 (Figure C.3-6).

Figure C.3-6: Enter Routing List Official's SSN

6. Complete the **First Name**, **Last Name**, **E-mail address**, and **Organization** fields if this SSN was entered into DTS for the first time (Figure C.3-7).

Figure C.3-7: Add a Routing Official Screen - New SSN

**Note:** If the SSN is recognized as a valid profile in DTS Production, a screen will display showing that it already exists.

7. Select **Save**.
8. Select **Continue**.

The screens will cycle through each of the suborganizations. Add ROs for each organization as needed.

Once AOs have been added, the screens will cycle again through each of the organization's routing lists asking if a routing list detail (e.g., a Reviewer) is needed.

### C.3.3.3 Add Routing List Details

Routing list details create the order of stamps for each routing list for an authorization, voucher, and local voucher.

After routing lists have been named and the ROs added into the Deployment Tool, the routing list details can be added. AOs, Optional ROs, and Conditional ROs are entered in respective order. Follow the below deployment tool steps for adding routing list details:

1. The Deployment Tool cycles through each organization prompting the user to add the AOs for all routing lists for authorizations, vouchers, and local vouchers for that organization. Add as many AOs as are necessary for the organizations' routing lists.
2. Select **Continue** to advance to the next desired organization to add AOs.
3. The Deployment Tool cycles through each organization, prompting the user to add Optional ROs for all routing lists for authorizations, vouchers, and local vouchers for that organization (Section C.3.3.4). Add as many Optional ROs as are necessary for the organization.
4. Select **Continue** to advance to the next organization to add Optional ROs.
5. The Deployment Tool cycles through each organization prompting the user to add any Conditional ROs for all routing lists for authorizations, vouchers, and local vouchers for that organization (Section C.3.3.5). Add as many Conditional ROs as are necessary for the organization.
6. Select **Continue** to advance to the next organization to add Conditional ROs.

**Note:** Optional ROs and Conditional ROs are not required. However, an AO is required for each routing list.

Follow the below steps to add all details to all three routing list types:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Read the Routing List Information screen for information and guidance concerning routing lists.
5. Select **Routing Lists** located under the Spreadsheet Templates for Download at the bottom of this screen.
6. Select **BEGIN**.

The Upload Routing List screen displays (Figure C.3-8).

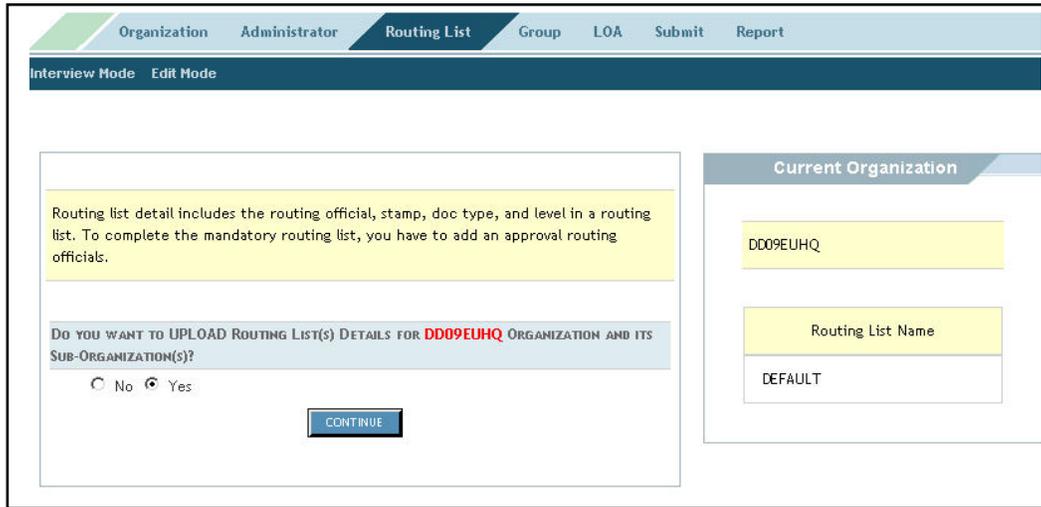


Figure C.3-8: Upload Routing List(s) Screen

7. Select the **Yes** radio button.
8. Select **Continue**.

The screen refreshes, now displaying a box labeled Upload Routing List(s) Detail (Figure C.3-9).

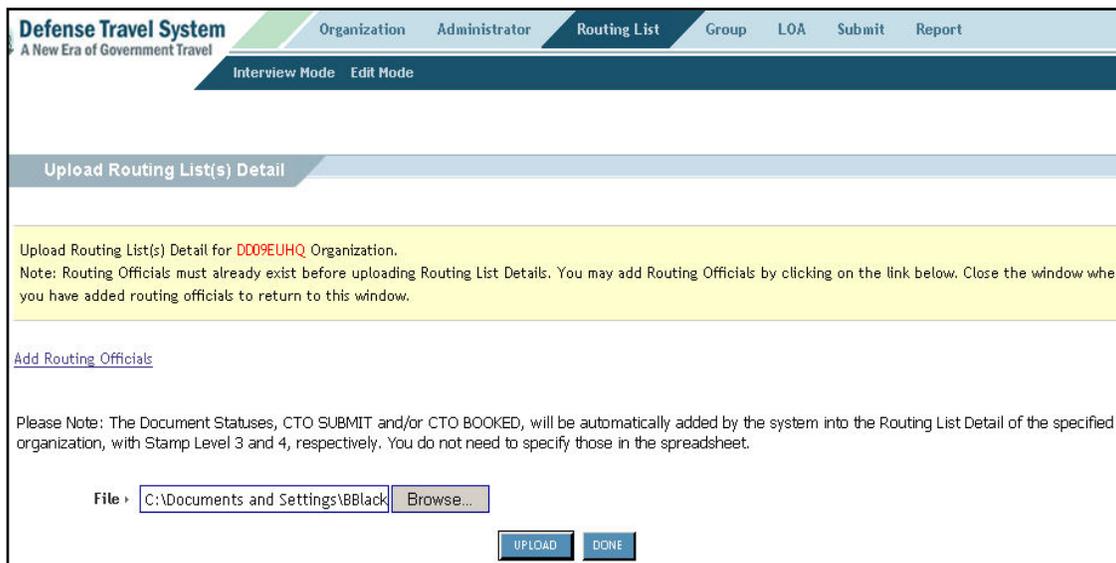


Figure C.3-9: Upload Routing List(s) Detail Screen

9. Select **Browse...** to locate the routing list to upload.
10. Select the routing list worksheet and select **UPLOAD**.

This will upload a populated Routing List Details worksheet template to the Deployment Tool. If no worksheet exists for routing list details, select **No** before selecting **Continue** and proceed to Step 11.

11. Select **UPLOAD**.

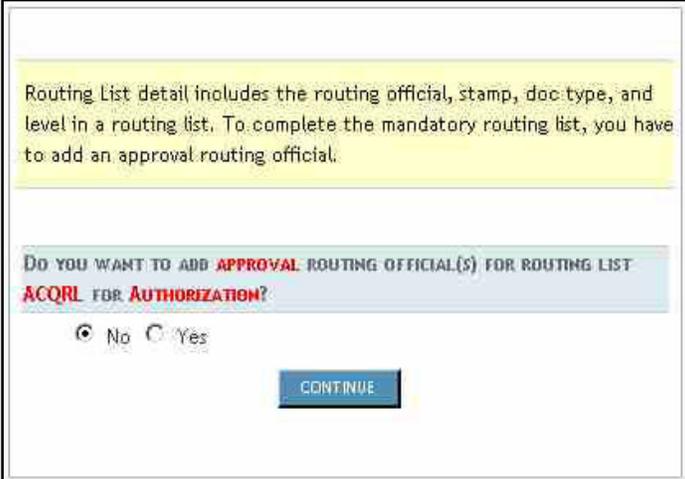
This populates the routing lists with the routing lists details.

12. Select the **Yes** radio button to create routing list details for the organization displayed on the screen.

-OR-

Select **No** to proceed to the next organization.

The user may select **No** each time until DTS scrolls to the desired organization (Figure C.3-10).



Routing List detail includes the routing official, stamp, doc type, and level in a routing list. To complete the mandatory routing list, you have to add an approval routing official.

DO YOU WANT TO ADD APPROVAL ROUTING OFFICIAL(S) FOR ROUTING LIST ACQRL FOR AUTHORIZATION?

No  Yes

CONTINUE

Figure C.3-10: Add An Approval Routing Official Screen

13. Select the **magnifying glass** icon to search for an official to add to the authorization routing list (Figure C.3-11).

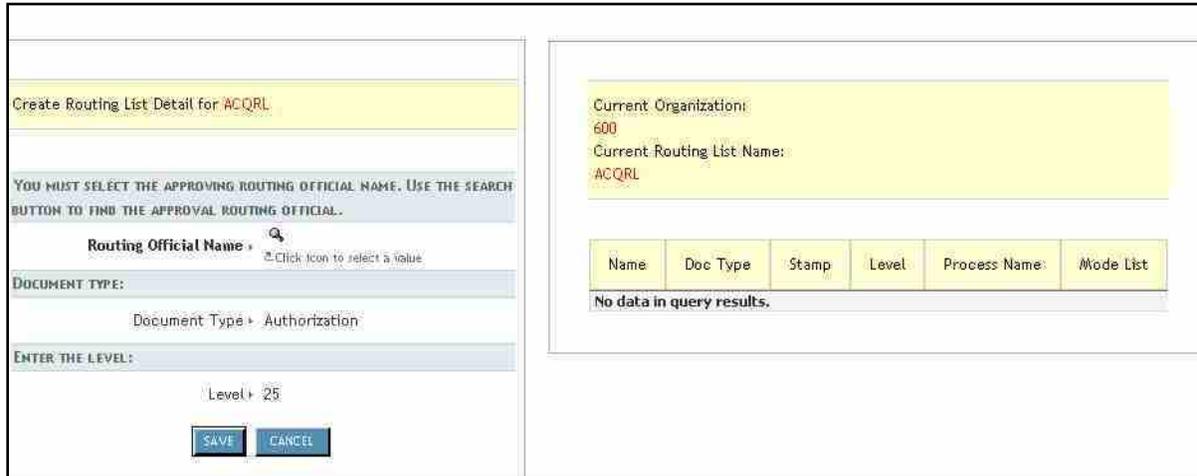


Figure C.3-11: Search for Routing Official Screen

The Search Method Selection Screen opens (Figure C.3-12).

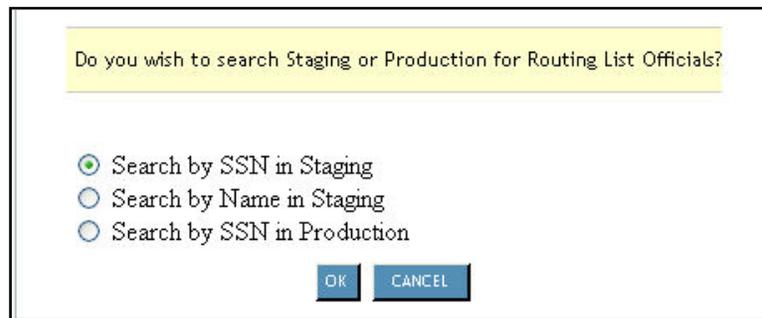


Figure C.3-12: Search Method Selection Screen

**Note:** Staging may be searched by either name or SSN. The RO can be found in Production only if they are associated with another organization that is in Production.

14. Select the method to search for the RO in Staging or Production.

15. Select **OK**.

The Routing Official Search screen opens.

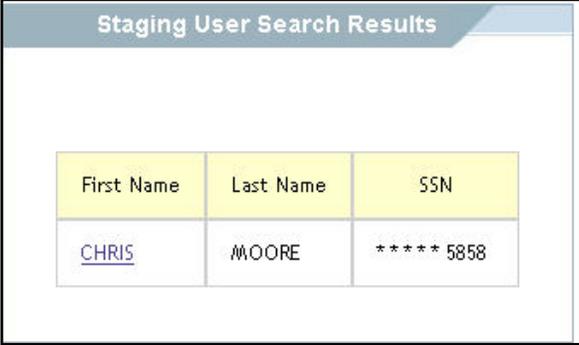
16. Complete the **SSN** field with the RO's SSN.

-OR-

Complete the **Name** fields if the user selected Search by Name from the Search Method Selection screen (Figure C.3-12).

17. Select **Search**.

The Routing Official Search Result screen opens (Figure C.3-13).



Staging User Search Results		
First Name	Last Name	SSN
<a href="#">CHRIS</a>	MOORE	***** 5858

Figure C.3-13: Routing Official Search Results

18. Select the official's **first name**.

The Create Routing List Details screen opens.

19. Select the **stamp** and **level** to associate with this official.

20. Select **Save** to add the selected person to the routing list.

21. Continue selecting AOs for vouchers and local vouchers until the AOs are complete for the routing lists.

### C.3.3.4 Add Optional ROs

After AOs have been added, the screens will cycle through each routing list asking if an Optional RO (such as a Reviewer) is needed in each of the organization's routing lists.

Once routing lists are named, ROs and routing details are added. The Copy Routing Lists screen displays. From here, the user can copy routing lists from the root organization, such as Honor Guard and Funeral Detail routing lists that may occur in every suborganization. This is also known as site-wide routing.

## C.3.4 Create Groups and Group Structures

The Groups feature in DTS allows local setup to comply with the Privacy Act by limiting access to the personal information contained in travel documents. A group is a list of travelers who have certain commonalities. Access to the group means that designated users have anytime access to travel documents for each traveler on the group membership list.

Travelers can be added to a group one at a time, or a Global Group Membership Rule (GGMR) can be created. GGMRs allow all the travelers in an organization to be added to a group at one time. When GGMRs are in place, the group will be updated automatically. The lists are then updated automatically each time a person is assigned to, received by, or detached from an organization. The steps below will guide the user through creating groups and group structures for organizations.

**Note:** Only one group can be added to an organization during the Site Setup Interview. Any additional groups in an organization must be created in the DTA Maintenance Tool.

**Note:** A GGMR may be created for any groups named within the root organization. The group added may serve no level higher than the root organization. If groups are needed for organizations higher than the root organization (e.g., service or agency groups and major command groups), they may be added using the DTA Maintenance Tool, after migration from Staging to Production (Section C.8.1).

Follow the below steps to create groups and group structures for organizations:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Group** from the navigation bar.

The Groups main screen opens.

4. Read the overview.
5. Select **BEGIN** at the bottom of the screen.
6. The Create Group Structure screen opens.
7. Select the **Yes** radio button to create a group or group structure for the selected organization.  
-OR-  
Select **No** to proceed to the next organization until the desired organization is reached.
8. Select **Continue**.
9. Enter the Group Name if a name other than the default is given (Figure C.3-14).

Create Group Structure for **Aviation & Missile Command**

USE THE PREDEFINED GROUP NAME OR RENAME THE GROUP:

Group Name > 600GP

PARENT ORGANIZATION'S GROUP(S) FOR GLOBAL GROUP MEMBERSHIP:

DO YOU WANT THE SUB-ORGANIZATIONS OF **AVIATION & MISSILE COMMAND** TO HAVE THIS GROUP FOR GLOBAL GROUP MEMBERSHIP?

Available For Sub-Organizations >  YES  NO

SAVE CANCEL

Figure C.3-14: Parent Organization — Group Structure

10. Select the **YES** radio button to cascade GGMR(s) to lower-level organizations.  
 -OR-  
 Select **NO** to disallow lower-level organizations from becoming members of this group.

If Yes is selected, it means that every time an ODTA from a lower-level organization creates a group, that ODTA can elect for the members of their organization to become members of that higher organization's group. This will allow that organization to be seen by the group at the higher-level organization.

11. Select **Save**.  
 -OR-  
 Select **Cancel** to cancel this action and return to the Create a Group Structure screen.

**Note:** A parent organization is any organization that has suborganizations.

12. Place a check in the **box(es)**. It is necessary to apply that GGMR to the organization.
13. Select the **YES** radio button to cascade the GGMR(s) to lower-level organizations.  
 -OR-  
 Select **NO** if you do not want to allow lower-level organizations to become members of this group (Figure C.3-15).

The screenshot shows a web form titled "Create Group Structure for AMCOM". It contains the following elements:

- A header bar with the text "Create Group Structure for AMCOM".
- A section titled "USE THE PREDEFINED GROUP NAME OR, RENAME THE GROUP:" containing a "Group Name" input field with the value "AMCOMGP".
- A section titled "PARENT ORGANIZATION'S GROUP(S) FOR GLOBAL GROUP MEMBERSHIP:" containing a checked checkbox next to "Aviation & Missile Command 600GP". A small tooltip below the checkbox reads: "Check the checkbox if you want to be a member of the parent organization's group."
- A section titled "DO YOU WANT THE SUB-ORGANIZATIONS OF AMCOM TO HAVE THIS GROUP FOR GLOBAL GROUP MEMBERSHIP?" containing two radio buttons: "YES" (which is selected) and "NO".
- A label "Available For Sub-Organizations" with a plus sign next to it.
- Two buttons at the bottom: "SAVE" and "CANCEL".

Figure C.3-15: Suborganization — Group Structure

14. Select **Save**.  
 -OR-  
 Select **Cancel** to cancel this action and return to the Create a Group Structure screen.

The Site Setup Tool will cycle through each organization asking if a new group or group structure should be created. This continues until the Deployment Tool has cycled through all suborganizations.

### C.3.5 Create LOAs

LOAs are established to identify funding for travel. The Deployment Tool provides three ways to generate LOAs for DTS:

- Upload LOAs from an Excel spreadsheet
- Enter LOAs manually
- Copy existing LOAs to organizations

**Note:** When an LOA is uploaded, created, or copied to an organization, it also cascades down to copy itself into all of the lower-level organizations.

#### C.3.5.1 Upload LOAs

Follow the below steps to upload LOAs:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

The Site Setup Interview screen opens.

3. Select **LOA** from the navigation bar.

The Lines of Accounting screen opens. The Spreadsheet Templates for Download section lists links to the spreadsheet formats for the services and agencies.

4. Select the appropriate **link**.

This will download a spreadsheet template that is formatted for the selected service or agency. Save the downloaded template.

5. Select **File > Save As > Browse** to save file in a folder.
6. Complete the Excel spreadsheet by entering the LOAs for upload.
7. Save the file.

Figure C.3-16 shows a spreadsheet template for the U.S. Army.

**Note:** In the Deployment Tool, LOAs with lower-case letters will not be imported from the worksheet and created LOAs will be forced into upper-case letters. This is to prevent mismatch of information with the Global Exchange (GEX) or accounting system.

C20									
	A	B	C	D	E	F	G	H	I
1	accLabel	budgetYear	fsnOrDtst	dtstSubfiel	dept	fy	bsn	lmt	py
2									
3									

C20												
	I	J	K	L	M	N	O	P	Q	R	S	T
1	py	oa	asn	rsc	odc	amspa	fca	mdep	sodp	eor	apcpj	ccc
2												
3												

C20												
	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF
1	pmc	tdc	fsn	tf	loc	fcn	fln	ibop	scé	ppcsjon	rcn	
2												

Figure C.3-16: Sample Army Spreadsheet Template Download

8. Select **BEGIN** at the bottom of the screen.
9. Select the **Yes** radio button if the LOA data are to be uploaded (Figure C.3-17). If the **No** radio button is selected, DTS will prompt the user to copy the LOA(s) (Section 3.5.3).

Lines of Accounting are used for reimbursement of travel cost.

DO YOU WANT TO UPLOAD LOAs FOR 509TH BOMB WING ORGANIZATION?

No
  Yes

Figure C.3-17: Upload LOAs Radio Buttons

10. Select **Continue**.

The Upload LOA screen opens (Figure C.3-18).

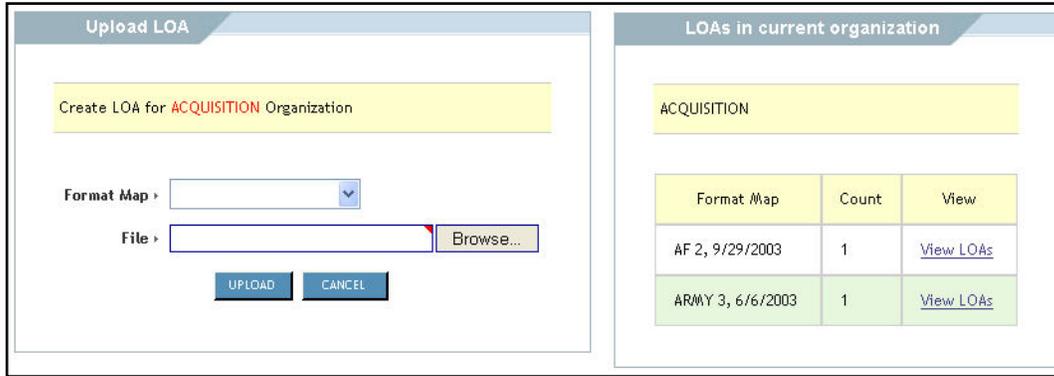


Figure C.3-18: Upload LOA Screen

11. Select the **Format Map** drop-down list arrow and select the format map.

12. Browse and select the spreadsheet.

13. Select **Upload**.

The initial LOA screen opens.

### C.3.5.1.1 Correct Rejected LOAs

The LOAs that failed to upload may be corrected and submitted for upload again. DTS displays them on the LOA screen in the left column of the table. An error message in the right column explains the reason for rejection (Figure C.3-19).

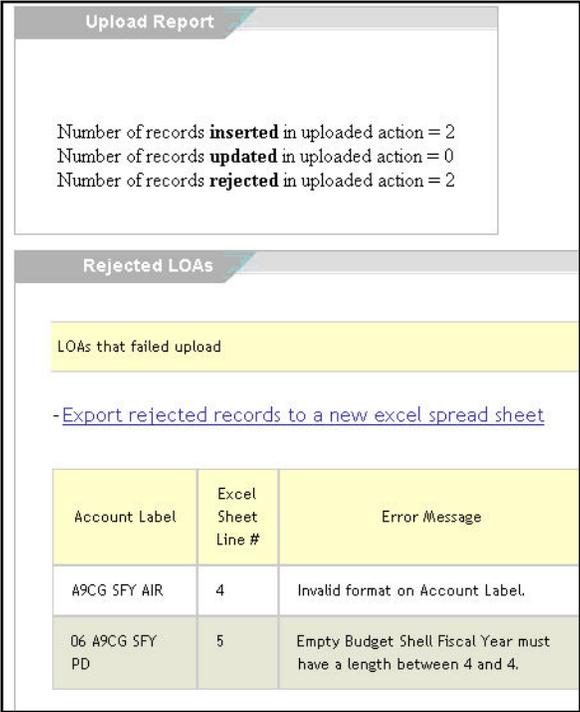


Figure C.3-19: Correct Rejected LOAs

The user may correct elements in the rejected LOAs and attempt to upload again by exporting the rejected records to a new spreadsheet and editing as necessary. Follow the below steps:

1. Select **Export rejected records to a new Excel spreadsheet.**

A new spreadsheet opens that contains the rejected LOAs.

2. Make corrections to the LOAs according to the error message(s) displayed on the DTS screen.
3. Retry the Upload procedure.

### C.3.5.2 Enter LOAs Manually

Follow the below steps to enter each LOA manually:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview.**

The Site Setup Interview screen opens.

3. Select **LOA** from the navigation bar.
4. Select **Begin**.

This will initiate the LOA Interview Mode.

5. Select the **No** radio button on the Upload LOAs screen.
6. Select **Continue**.
7. Select the **Yes** radio button on the Create LOAs screen (Figure C.3-20).

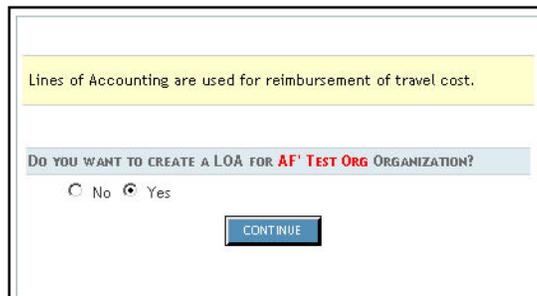


Figure C.3-20: Create LOA Radio Buttons

8. Select **Continue**.

The Create LOA screen displays a drop-down list of the format maps (Figure C.3-21).

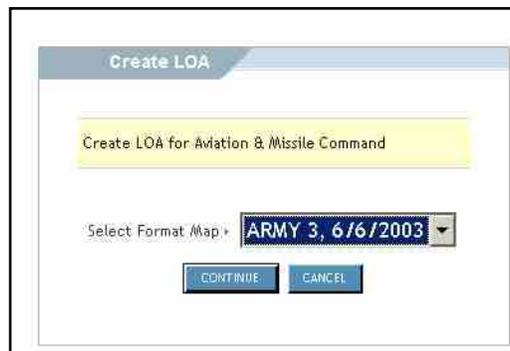


Figure C.3-21: Create LOA Screen

9. Select the **Select Format Map** drop-down list arrow and select the **format map** for the new LOA.
10. Select **Continue**.  
-OR-  
Select **Cancel** to cancel this action and return to the Create LOAs screen.

The Create LOA screen refreshes. It displays a template for the selected format map (Figure C.3-22).

Figure C.3-22: Army Template To Create LOA Manually

11. Complete all **fields** necessary to create the LOAs.
12. Select **Save**.

### C.3.5.3 Copy an Existing LOA

Follow the below steps to copy an existing LOA:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

The Site Setup Interview screen opens.

3. Select **LOA** on the navigation bar.
4. Select **Begin**.

5. Select the **No** radio button on the Upload LOAs screen.
6. Select **Continue**.
7. Select the **No** radio button on the Create LOAs screen.
8. Select **Continue**.
9. Select **Yes** to Copy LOAs from the organization shown in the screen.  
-OR-  
Select **No** to proceed to the next organization. Repeat until the desired organization is displayed.

The Copy an LOA screen opens (Figure C.3-23).

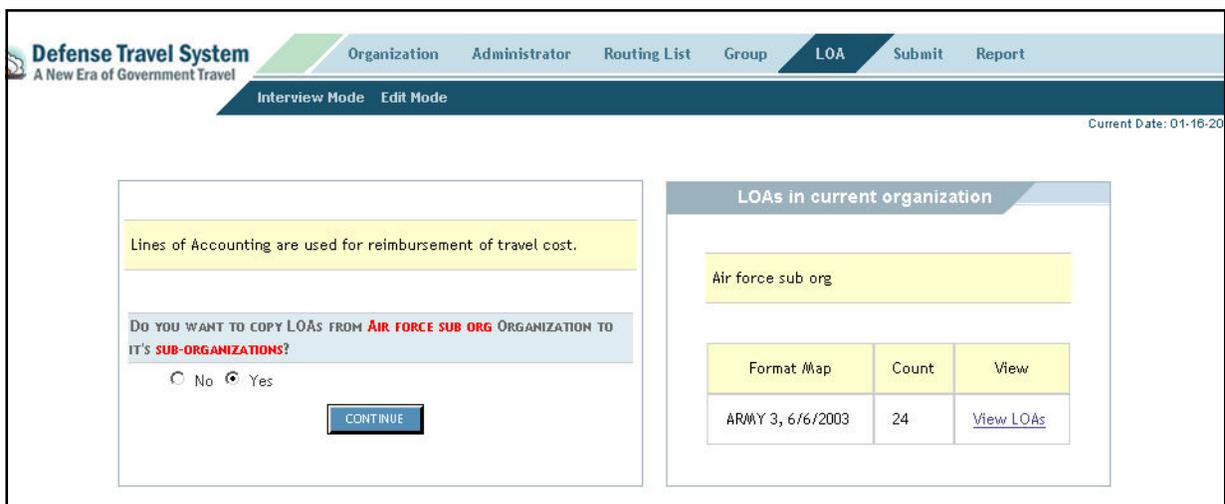


Figure C.3-23: Copy an LOA

10. Select **Continue**.

The Copy LOA screen opens. It allows the user to copy selected LOAs to selected suborganizations (Figure C.3-24).

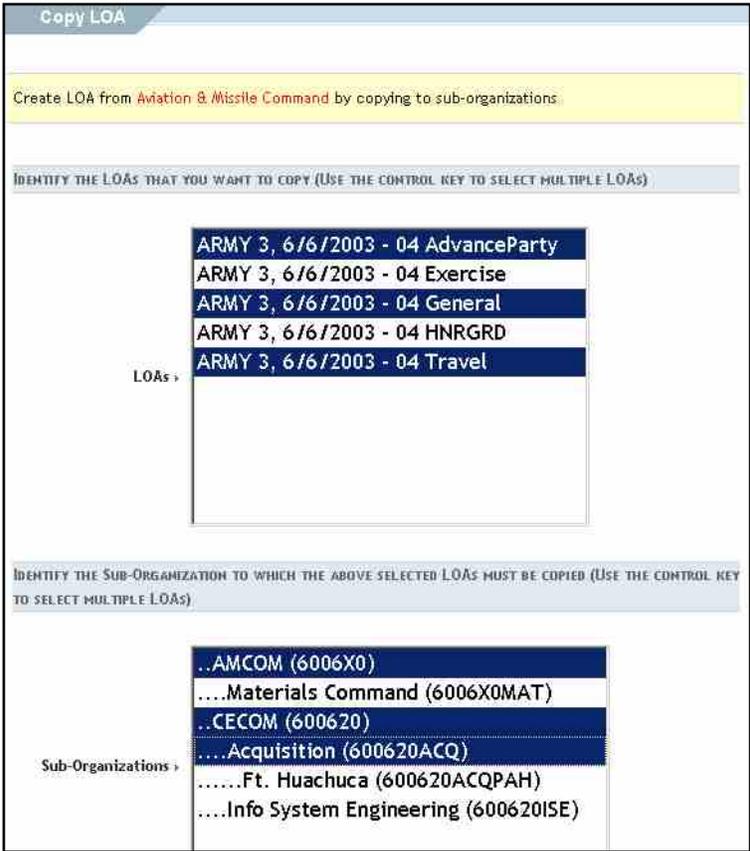


Figure C.3-24: Copy Selected LOAs to Selected Organizations

- 11. Select the **LOAs** that you want to copy.
- 12. Select the **suborganizations** to which the LOAs should be copied.
- 13. Select **Copy**.

The Copy LOA Report screen will display the number of LOAs that were copied, updated, and rejected (Figure C.3-25).

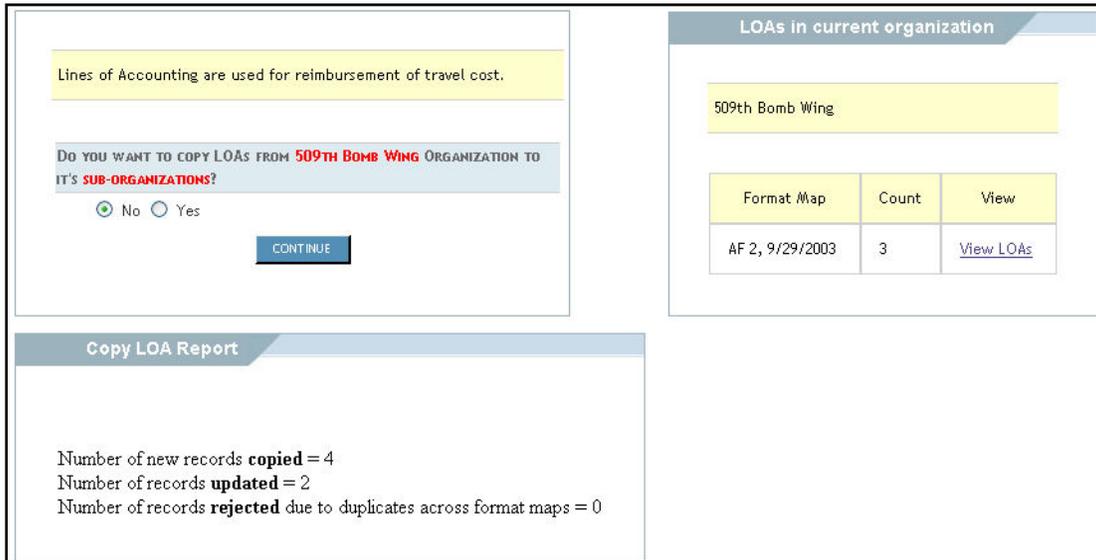


Figure C.3-25: Copy LOA Report

14. Select **Yes** to copy LOAs from the organization shown on the screen.

-OR-

Select **No** to proceed to the next organization. Repeat until the desired organization is displayed.

15. Select **Continue**.

**Note:** When the Service or Agency Representative approves an LOA for migration, a budget shell for the LOA is created in the Budget Admin Tool. Budget targets for each LOA must be added manually in the Budget Admin Tool.

## C.4 Site Setup Interview: The Edit Mode

The Edit Mode allows experienced DTAs to modify the structure built in the Interview Mode. Additionally, a DTA can build structures quickly and in a less restrictive manner in the Edit Mode than in the Interview Mode. At any point in the Edit Mode, a DTA can add, edit, or delete organizations, routing lists, groups, and LOAs without using the sequence in the Interview Mode. However, the Edit Mode does not have the cascading of information feature of the Interview Mode.

### C.4.1 Organization

Follow the below steps to access organizations in the Edit Mode of Site Setup Admin:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview** (Figure C.4-1).



Figure C.4-1: DTA Administrative Menu

3. Select **Edit Mode** under Organizations.

Figure C.4-2 shows the options for organizations in the Edit Mode.

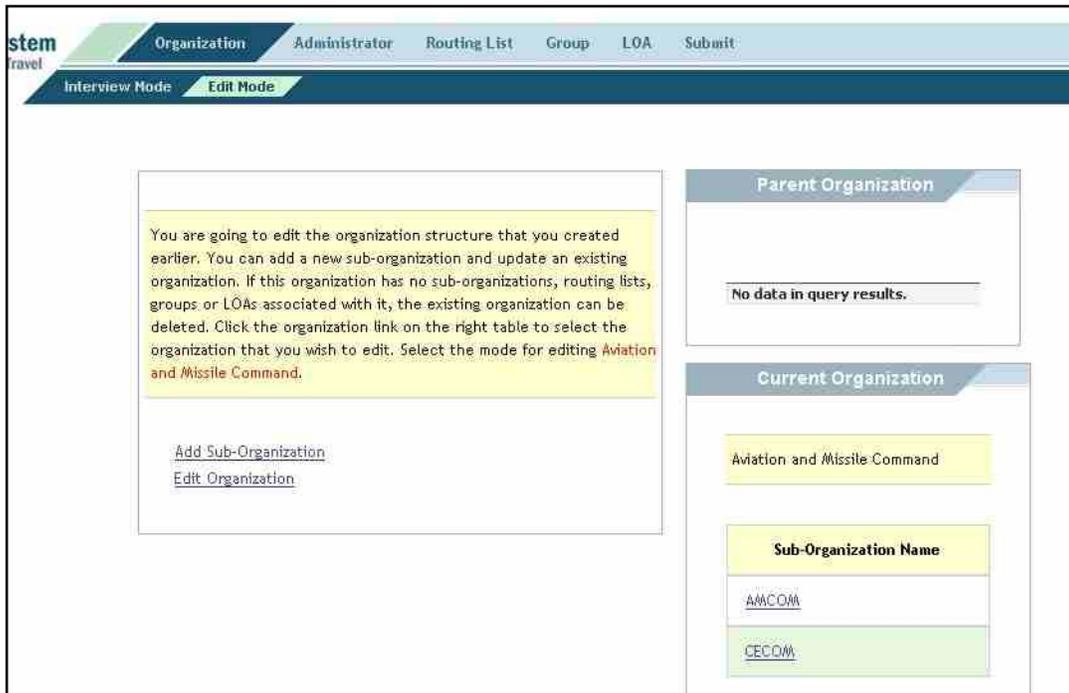


Figure C.4-2: Edit Mode – Organization Options

The screens in Edit Mode have the following two main parts:

- a. The right side allows navigation through the organization structure. The screen opens and displays the highest-level organization designated for the DTA. The lower block contains links to each of the sub-organizations. The Parent Organization block above indicates the next higher organization and is an active link if the DTA has organization privileges in the Deployment Tool. The DTA navigates the organization structure by selecting the links to change the Current Organization.
- b. The left side is the working space. It contains two selections that allows the user to perform the following:
  - Add a suborganization to the current organization
  - Edit the current organization.

### C.4.1.1 Add Suborganizations

Beginning on the Edit Mode screen, follow the below steps to add a suborganization:

1. Select **Add Sub-Organization**.

The Create Sub-Organization screen opens (Figure C.4-3).

Figure C.4-3: Edit Mode – Add Suborganization

2. Complete the **Organizational Code** field.

This is the organization naming structure as determined by the LDTA.

3. Complete the **Organization Name** field.

This is the name by which the organization is recognized.

4. Complete or edit the remaining fields.

5. Select **Save**.

**Note:** The layout of the working area on the left side of the screen is the same as the Interview Mode screens and DTA Maintenance screens for creating an organization. Mandatory fields have a red triangle in the upper right corner.

### C.4.1.2 Edit Organizations

When a user edits an existing suborganization, the screen is the same for the organization data; the organization name cannot be changed. Follow the below steps to edit an organization.

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Edit Mode** on the subnavigation bar.
4. Select the **organization** to edit from the Current Organization box.

**Note:** To edit a lower-level organization that is not shown, select its parent organization to display its suborganizations (Figure C.4-4).

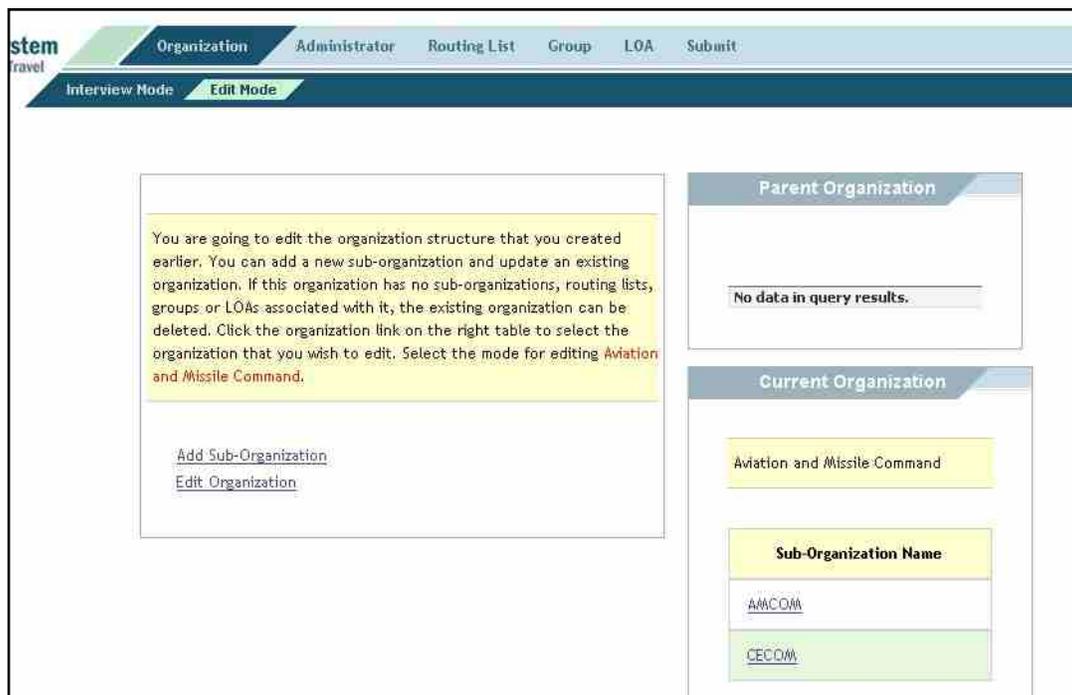


Figure C.4-4: Edit Mode – Edit Existing Organization

5. Edit the data as necessary (Figure C.4-5).

The screenshot displays the 'Edit Mode' interface for an existing organization. The main content area is titled 'Edit Sub-Organization: Aviation and Missile Command'. It features several input fields and dropdown menus for organization details. The 'DTS ORGANIZATION DESCRIPTION' section includes the 'DTS Organization Code' (600) and the 'DTS Organization Description' (Aviation and Missile Command). The 'ORGANIZATION INFORMATION' section includes the 'DTA ID' (8 - fsudta@yahoo.com), 'GDS' (AA), 'PCC' (D1 WA), 'Ticket PCC' (D1 WA), 'Company Code' (PROFILE), 'Office Address 1' (24 East Railroad St.), 'Office City' (Warren), 'Office State' (WI), 'Office ZIP/Postal Code' (48091), 'Mail Code', 'Time Zone' (CST), and 'Organization Email Address' (LDTA@AMC.MIL). A sidebar on the right, titled 'Current Organization', shows the selected organization 'Aviation and Missile Command' and a list of 'Sub-Organization Name' options, including 'AMCOM' and 'CECOM'.

Figure C.4-5: Edit Mode – Edit Existing Organization

6. Select **Save**.

### C.4.1.3 Delete Organizations

Follow the below steps to delete an organization:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select the appropriate **organization** from the **organization** drop-down list.

4. Select **Edit Mode** from the subnavigation bar.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

5. Select the **organization** or **suborganization** for deletion from the right side of the screen (Figure C.4-6).

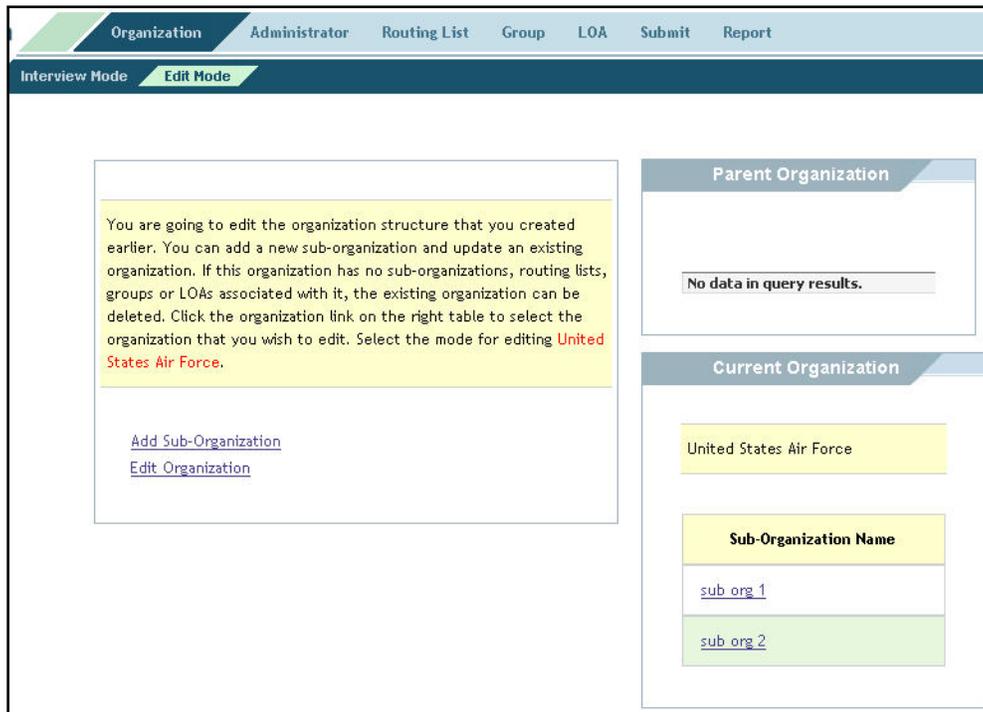


Figure C.4-6: Edit Mode - Organization Screen

6. Select **Delete Organization** from the left side of the screen (Figure C.4-7).

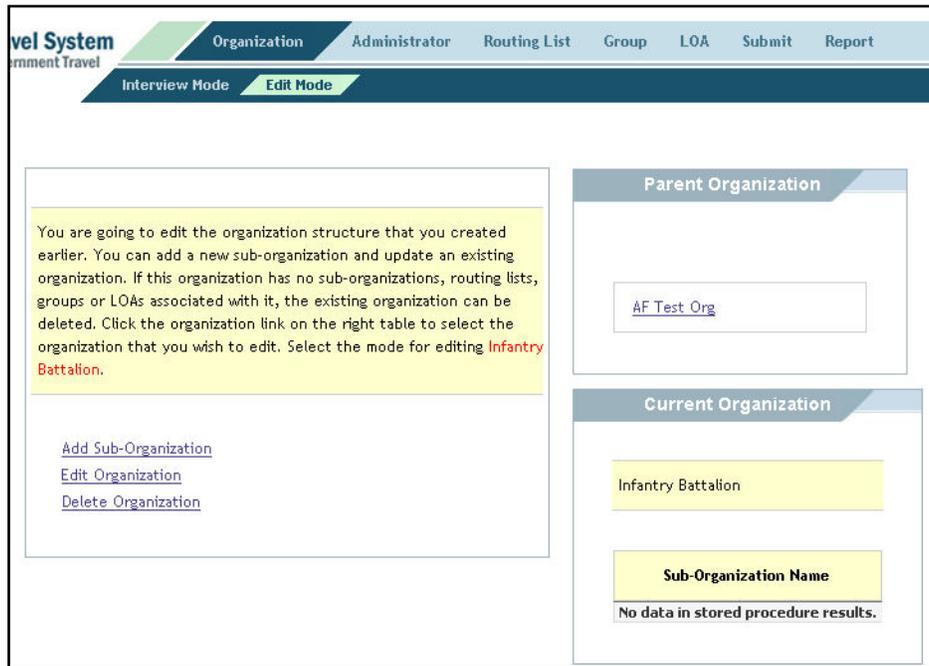


Figure C.4-7: Edit Mode - Delete Organization Link

**Note:** The Delete Organization link will not display if the organization has any suborganizations, DTAs, groups, routing lists, ROs, or LOAs associated with it.

The Delete Organization screen opens. It displays organization information.

7. Select **Delete**.

## C.4.2 Administrator

The Administrator tab is used to create, view, edit, and delete DTAs. Administrators will create DTAs to build organization structure, accept self-registration, and complete LOAs. A DTA can edit privileges and change the delegated organization (Figure C.4-8).

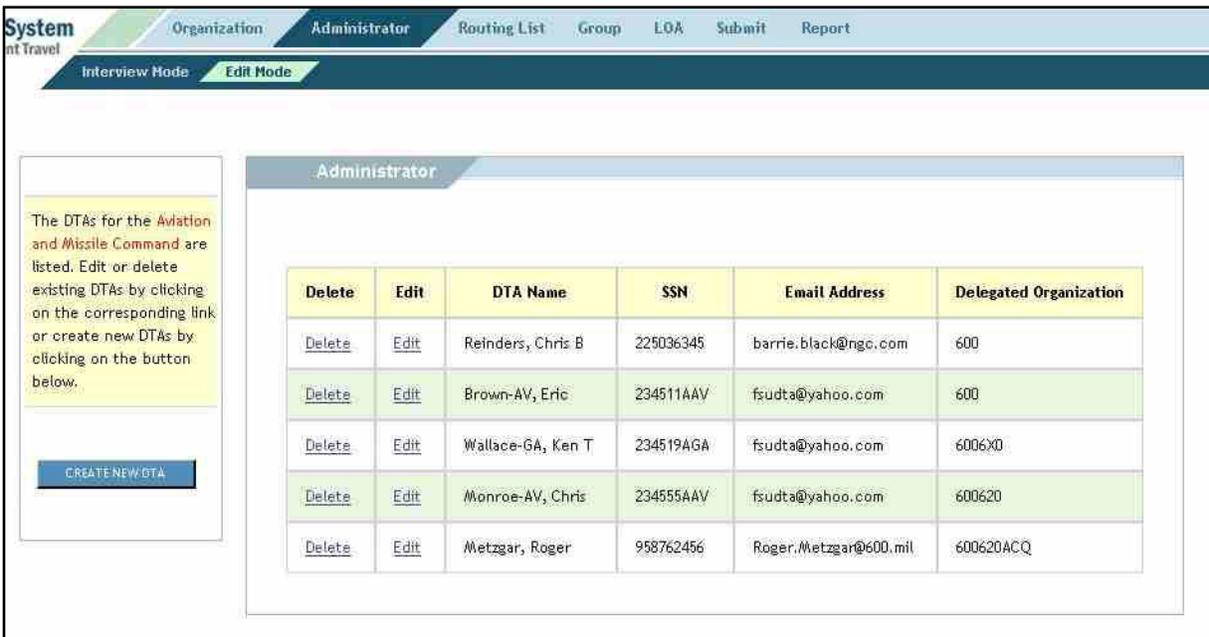


Figure C.4-8: Edit Mode – Administrator

### C.4.2.1 Edit a DTA

Follow the below steps to edit an existing DTA:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Administrator** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select **Edit** next to the name of the DTA.
6. Edit the fields as necessary.

**Note:** The SSN cannot be changed.

### C.4.2.2 Delete a DTA

Follow the below steps to delete a DTA:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Administrator** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select **Delete** next to the name of the DTA.

**Note:** By selecting Delete next to a DTA's name, the DTA is removed from the Deployment Tool. The DTA will not be able to access Site Setup Interview to see the organization's data. Deleted DTAs can still log onto DTS using their Production profiles or by completing the Self-Registration process.

### C.4.3 Routing Lists

The Routing Lists tab allows DTAs to create, edit, or delete routing lists. ROs and routing list details can also be added or deleted.

#### C.4.3.1 Add a New Routing List Name

Follow the below steps to add a new routing list name:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.

The Routing List Functions screen opens (Figure C.4-9). It is populated to the highest organization to which the DTA has organization privileges in the Deployment Tool (Section C.2.1.2).

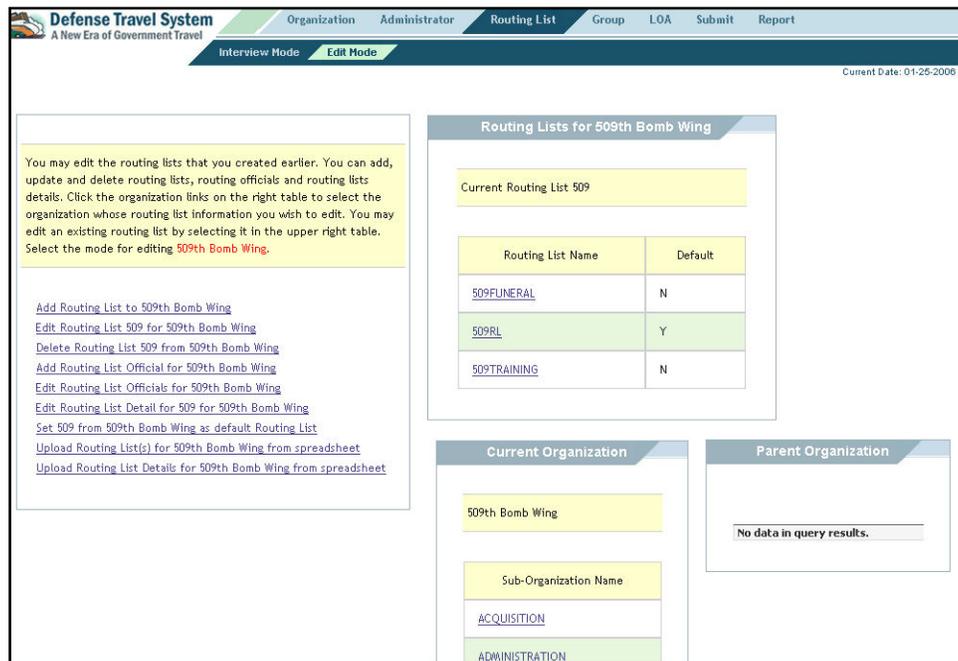


Figure C.4-9: Edit Mode – Routing List Functions

The Routing List Functions screen contains four boxes. The box in the lower middle of the screen shows the current organization and its suborganizations. The box on the right shows its parent organization. Except for the current organization, these are all displayed as links that may be used to navigate up or down the organization hierarchy. Select a link to make that organization the current organization.

The box in the upper middle of the screen shows the current organization's existing routing lists. Only the current routing list may be edited. To select a current routing list, select the appropriate link under the Routing List Name.

The box on the left side is the workspace. It contains links for each action that may be performed on the current routing list.

5. Select the **organization** to which the routing list is to be added.

This action will change the organization links available in the left box. The DTA must be sure to select the correct organization.

6. Select **Add Routing List to (organization)**.

The Create Routing List Screen opens (Figure C.4-10).

Figure C.4-10: Edit Mode – Create Routing List Screen

7. Complete the **Routing List Name** field.
8. Select the **Yes** or **No** radio button to indicate whether or not the routing list is available for sub-organizations.
9. Select **OK**.

### C.4.3.2 Edit a Routing List Name

Follow the below steps to edit a routing list name:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list to be edited.

The Routing List Functions screen opens (Figure C.4-9).

6. Select the **routing list name**.
7. Select **Edit Routing List for (organization)**.

The screen displays the routing list name in the routing list name field (Figure C.4-11).

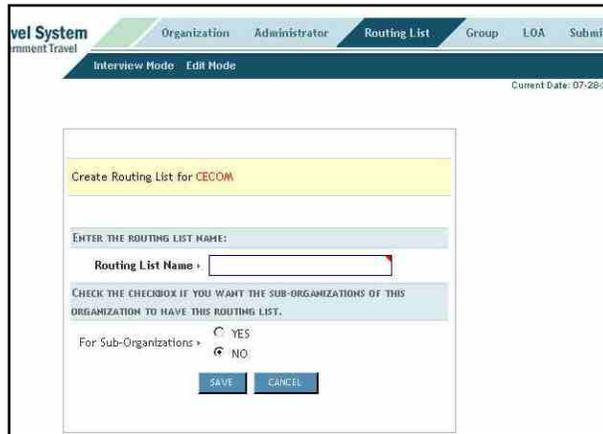


Figure C.4-11: Edit Mode – Edit Existing Routing List

8. Edit the name of the routing list.
9. Select the **Yes** or **No** radio button to indicate whether or not the routing list is available for sub-organizations
10. Select **Save**.

### C.4.3.3 Delete a Routing List

Follow the below steps to delete a routing list:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list to be edited.

The Routing List Functions screen opens (Figure C.4-9).

6. Select the **organization** from which the routing list is to be deleted.
7. Select **Delete Routing List for (organization)**.

The screen refreshes; the deleted routing list no longer displays.

### C.4.3.4 Create an Routing Official (RO)

Follow the below steps to add an RO:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list to which an RO is to be added.

The Routing List Functions screen opens (Figure C.4-9).

6. Select **Add Routing List Official for (organization)**.
7. Enter the **SSN** of the RO (Figure C.4-12).

The screenshot shows the 'Defense Travel System' interface in 'Edit Mode'. The top navigation bar includes 'Organization', 'Administrator', 'Routing List', 'Group', 'LOA', and 'Submit'. Below the navigation bar, there are two main panes. The left pane is titled 'Enter the routing official's SSN. Production and Staging will be searched for matches. If no match is found, you will be able to create a new Staging user.' It contains an input field for 'SSN', a 'SEARCH' button, and a 'CANCEL' button. The right pane is titled 'Routing List Official' and contains a table of existing officials. The table has two columns: 'Delete' and 'AO Name'. The first row shows 'Delete' and 'Black, Barrie'. The second row shows 'Delete' and 'White, Mike'.

Delete	AO Name
<a href="#">Delete</a>	<a href="#">Black, Barrie</a>
<a href="#">Delete</a>	<a href="#">White, Mike</a>

Figure C.4-12: Edit Mode – Add New Routing Official SSN

8. Select **Search**.

An RO who already has a Production profile does not need to be added. Follow the steps in Section C.3.3.2.

If the user is listed in Staging and is in a different root organization, that person cannot be used as an RO until they are migrated into Production.

If the user already has a Staging profile, the profile will display (Figure C.4-13). **Save** or **Cancel** may be selected.

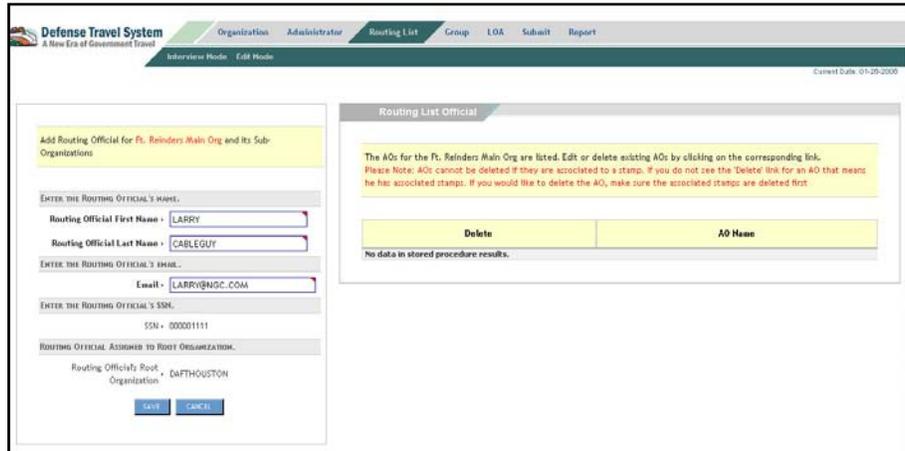


Figure C.4-13: Routing Official SSN Exists in Staging Screen

If no profile exists for the SSN, a blank profile will display.

9. Complete the fields.
10. Select **Save** to save the Staging profile in DTS.  
-OR-  
Select **Cancel** to return to the Add New Routing Official SSN screen without saving the profile.

### C.4.3.5 Edit or Delete ROs

Follow the below steps to edit or delete an RO:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list of which the RO is a detail.

The Routing List Functions screen opens (Figure C.4-9).

6. Select **Edit Routing List Official for (organization)**.

The Edit Routing List Officials screen opens (Figure C.4-14).

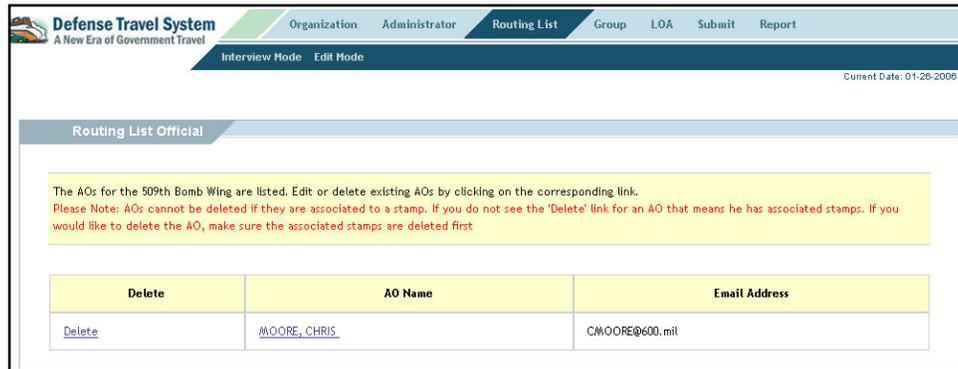


Figure C.4-14: Edit Routing List Official Screen

7. Select **Delete** to delete the RO. **Warning:** There is no confirmation of this action.  
-OR-  
Select the **name link** for the RO.

The RO's profile opens.

8. Edit the fields as appropriate.

**Note:** The Delete link will not display for an RO who has been assigned a stamp in a routing list. The user must first remove the RO from all routing lists before the official can be deleted.

### C.4.3.6 Edit Routing List Details

Follow the below steps to edit routing list details:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list.

The Routing List Functions screen opens (Figure C.4-9).

6. Select **Edit Routing List Detail for (organization)**.

The Edit Routing List Details screen opens (Figure C.4-15).

Name	Doc Type	Doc Status (Stamp)	Level	Process Name	Mode List	
**CTO SUBMIT	AUTH	CTO SUBMIT	3	BYPASS PNR		Delete
**CTO BOOKED	AUTH	CTO BOOKED	4	BYPASS PNR		Delete
Black, Barrie	AUTH	APPROVED	25			Delete

Figure C.4-15: Edit Mode – Edit Routing List Details

7. Select the **magnifying glass** icon to search for the RO.

The Search for RO window opens (Figure C.4-16).

Figure C.4-16: Search for RO Window

8. Select the **radio button** for the preferred search method.

9. Complete the **search** criteria fields.

10. Select the **name** of the RO.

The Edit Routing List Detail screen refreshes with the name of the RO populated (Figure C.4-17).

Name	SSN	Doc Type	Doc Status (Stamp)	Level	Process Name
**CTO SUBMIT		AUTH	CTO SUBMIT	3	BYPASS PNR
**CTO BOOKED		AUTH	CTO BOOKED	4	BYPASS PNR

Figure C.4-17: Edit Routing List Detail - RO Named

11. Select the **Document Type** drop-down list and select the **Document Type** that will route on this routing list.
12. Select the **Document Status** drop-down list and select the **Document Status** stamp for this RO.
13. Select the **Level** drop-down list and select the **Level** at which this step should be placed in the routing list.
14. Select the **Process Name** only if the step is conditional.
15. Select **ADD**.

### C.4.3.7 Set a Routing List as the Default Routing List

Follow the below steps to set a routing list as the default routing list:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

3. Select **Routing List** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.
5. Select the **organization** that owns the routing list.

The Routing List Functions screen opens (Figure C.4-9). The routing lists display as links in the Routing Lists for (organization) box.

6. Select the **routing list** to be named as the default routing list.
7. Select **Set (routing list name) from (organization) as default Routing List**.

The screen refreshes. The *N* in the Default column to the right of the Routing List Name changes to a *Y*.

## C.4.4 Groups

The Groups functionality allows a DTA to edit, create, and delete groups and edit GGMRs. The Deployment Tool allows only one group to be created for an organization.

### C.4.4.1 Edit a Group

Follow the below steps to edit a group:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Groups** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.

The Edit Groups screen opens (Figure C.4-18). It is populated to the current organization, the highest organization to which the DTA has organization privileges.

The screenshot shows the 'Edit Mode' interface for a group. The top navigation bar includes 'Organization', 'Administrator', 'Routing List', 'Group', 'LOA', 'Submit', and 'Report'. Below the navigation, there are five main sections:

- Introductory Text:** A yellow box explaining that the user is editing a group structure. It notes that if no group is defined, a new one can be added, or an existing one can be updated or deleted. It also mentions that global group members are listed in the 'Members of This Group' section.
- Group Information:** A box showing the current organization as 'Info System Engineering' and the group as 'ISEGP'. It includes links for 'Edit Group' and 'Delete Group'.
- Parent Organization:** A box displaying 'CECOM' as the parent organization.
- Current Organization:** A box displaying 'Info System Engineering' as the current organization. It also has a 'Sub-Organization Name' field with the message 'No data in stored procedure results.'.
- Global Group Membership:** A box titled 'Global Group Membership' stating 'This group is a member of the groups below:'. It contains a table:
 

Organization	Group
Aviation & Missile Command	600GP
CECOM	620GP
- Members of This Group:** A box titled 'Members of This Group' stating 'The following organizations are members of this group:'. It has a table with columns for 'Member Organization' and 'Member Group'.

Figure C.4-18: Edit Groups Screen

The Edit Groups screen displays five boxes. The first box explains that the user is going to edit a group structure. The following information displays below the explanation:

- Organization name
- Group name
- Links to edit and delete the group. (If there is no group defined, a link to add a group will display instead.)

The remaining four boxes are as follows:

- *Parent Organization.* Displays the parent organization of the current organization
- *Current organization.* Displays current organization name. Displays links to other suborganizations of the parent organization
- *Global Group Membership.* Shows the groups to which members of the current group automatically belong, and the organizations that own those other groups
- *Members of This Group.* Lists the organizations that belong to the current group because of their own GGMRs.

5. Select **Edit Group**.
6. The Edit Group Structure screen will open (Figure C.4-19).

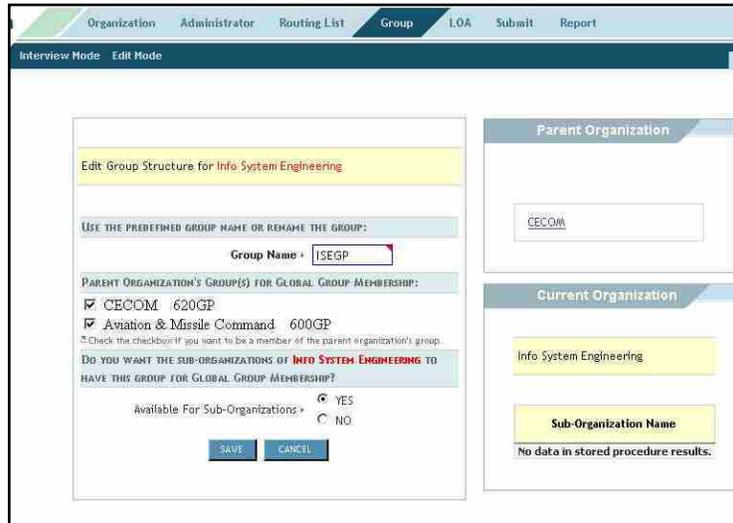


Figure C.4-19: Edit Mode – Edit Group Structure

7. Edit the **Group Name** if desired.
8. Check the box(es) of any **GGMRs** to be applied to the organization.
9. Select the **Yes** radio button to allow lower-level organizations to use GGMRs to join this organization's group.  
-OR-  
Select the **No** radio button to not allow lower-level organizations to become members of this group.
10. Select **Save**.

**Note:** A GGMR may be created for any groups named within the root organization. A group may serve no level higher than the root organization. If groups are needed for organizations higher than the root organization (e.g., service, agency, or major command groups), they may be added using the DTA Maintenance Tool. This can be done after migration to Production (Section C.8).

### C.4.4.2 Delete a Group

Follow the below steps to delete a group:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Groups** on the navigation bar.
4. Select **Edit Mode** on the subnavigation bar.

The Edit Groups screen opens (Figure C.4-18). It is populated with the current organization, the highest organization to which the DTA has organization privileges.

5. Select **Delete Group**.

This action will also delete all GGMRs that other organizations used to join the group (Figure C.4-20).

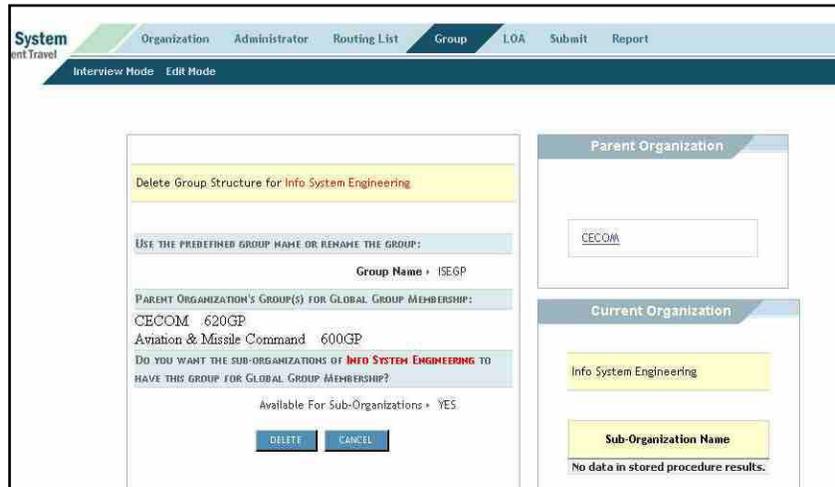


Figure C.4-20: Edit Mode – Delete Group and Reset GGMR

## C.4.5 LOAs

The LOA functionality enables a DTA to create, upload, copy, and edit LOAs for an organization hierarchy. The DTA must always make sure that the current organization is correct before performing any of these tasks.

### C.4.5.1 Create a New LOA Manually

Follow the below steps to manually enter a single new LOA:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

3. Select **LOA** on the navigation bar.

The LOA Information screen opens.

4. Select **Edit Mode** on the subnavigation bar.

The LOA screen opens in the Edit Mode (Figure C.4-21).

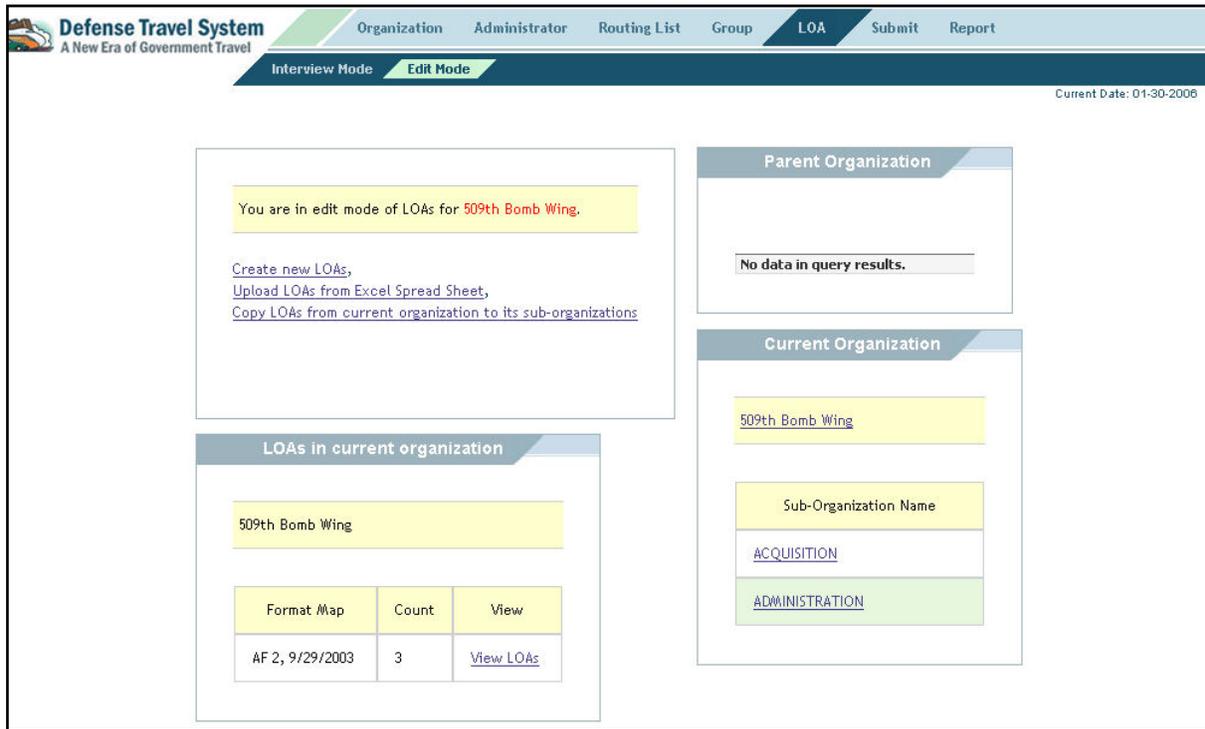


Figure C.4-21: LOA Screen - Edit Mode

5. Select the **organization** to which the LOA is to be added.
6. Select the **Create new LOAs** link.

The Create LOA screen opens (Figure C.4-22).

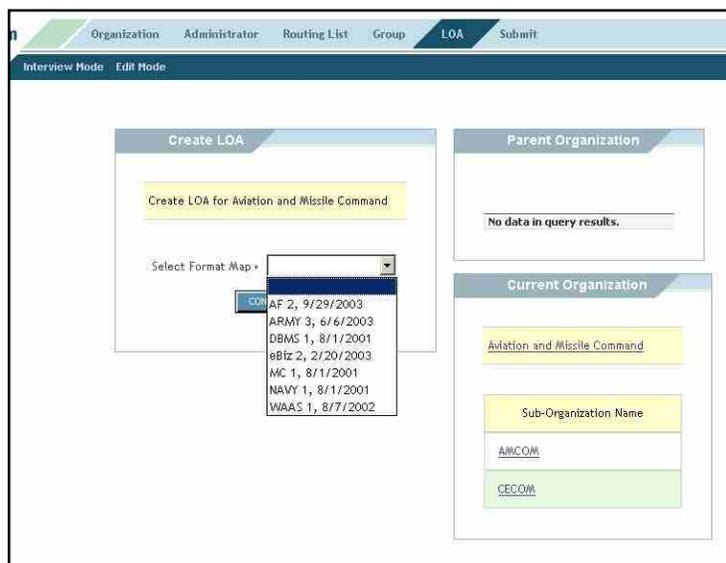


Figure C.4-22: Create LOA Screen

7. Select the **format map** drop-down list arrow and select the **format map**.
8. Select **CONTINUE**.

The screen refreshes. It displays the LOA format fields in which to enter the LOA data for the current organization will be entered.

9. Complete all the necessary fields.

**Note:** Do not include the fiscal year (FY) in the LOA name. For example, the LOA Name is TRAINING, not 09 TRAINING. DTS sets the first two digits of the label to the FY automatically.

### C.4.5.2 Upload LOAs

Follow the below steps to upload LOAs from a spreadsheet:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

3. Select **LOA** on the navigation bar.

The LOA Information screen opens. It provides a link to a spreadsheet template for each of the format maps.

4. Select the correct **spreadsheet template** to download.

5. Save the file to the desktop.
6. Select **Edit Mode** on the subnavigation bar.

The LOA screen opens in the Edit Mode (Figure C.4-23).

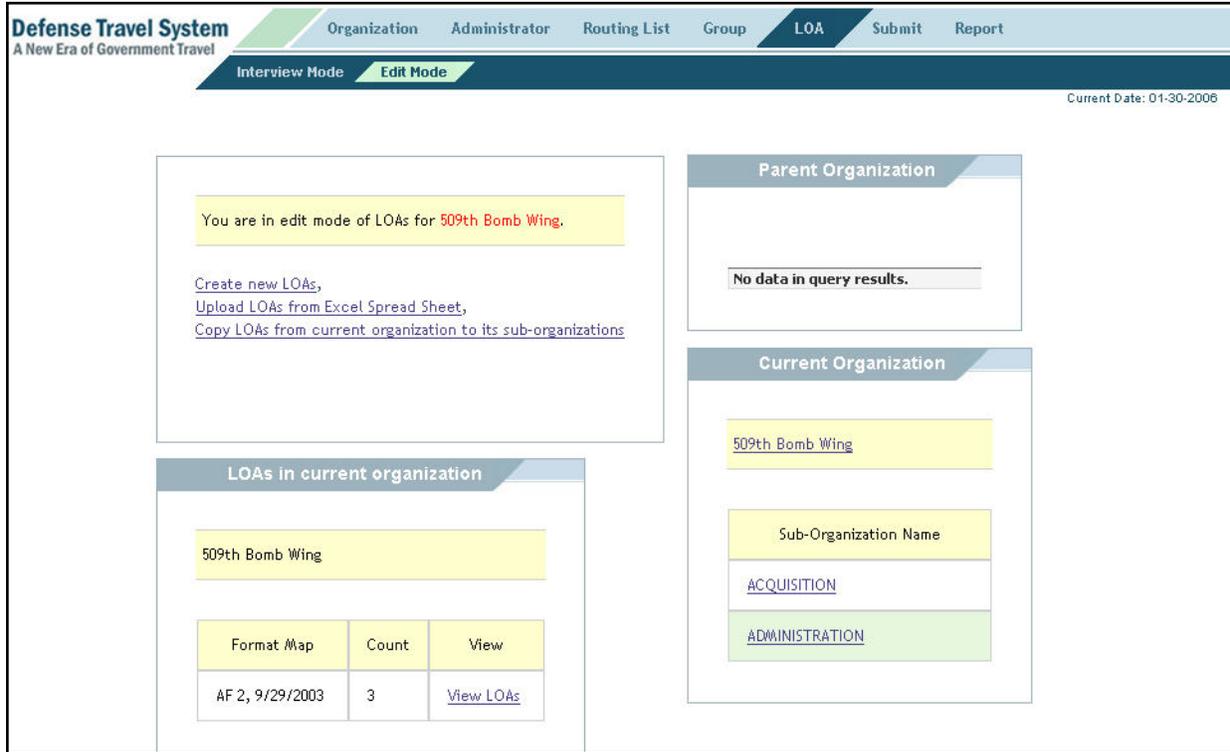


Figure C.4-23: Edit Mode – Edit LOAs

7. Select the **organization** to which you want to add the LOA.
8. Select **Upload LOAs from Excel Spread Sheet**.

The Upload LOA screen opens.

9. Select the **Format Map** drop-down list arrow and select the correct **format map**.
10. Select **Browse...**

The Choose file window opens.

11. Select the **file** that was saved to the desktop in Step 5.
12. Select **Upload**.

The Edit LOAs screen refreshes. It displays the following two new boxes:

- *Upload Report* shows the results of the LOA upload
- *Rejected LOAs* shows any LOAs that failed to upload

### C.4.5.3 Copy LOAs

Follow the below steps to copy LOAs from the current organization to one or more suborganizations:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

3. Select **LOA** on the navigation bar.

The LOA Information screen opens.

4. Select **Edit Mode** on the subnavigation bar.

The LOA screen opens in the Edit Mode (Figure C.4-21).

5. Select **Copy LOAs from current organization to its suborganizations**.

The Copy LOA screen opens (Figure C.4-24).

Figure C.4-24: Copy LOA Screen

6. Select the **LOA(s)** that are to be copied from the LOAs box.
  7. Select the **Suborganization(s)** to which the LOA(s) is to be applied.
- Note:** Press the **Shift** key while making multiple selections.
8. Select **Copy**.

The Edit LOAs screen refreshes. It displays the Copy LOA Report box.

**Note:** Budget shells with the same label name and data elements as the LOA are automatically created upon data migration into production (Section C.7.2).

## C.5 Review, Complete, and Submit Data

Upon completion of the setup of each organization, routing list, group, and LOA, the LDTA initiates a Deployment Tool review of the data. The LDTA must review each functional area and stamp it COMPLETE to make the organization eligible for submission to the Service or Agency Representative. The Service or Agency Representative then approves the setup for migration to Production.

Read the Review Organization Instructions on the Defense Travel System Submit screen to better understand this process (Figure C.5-1).

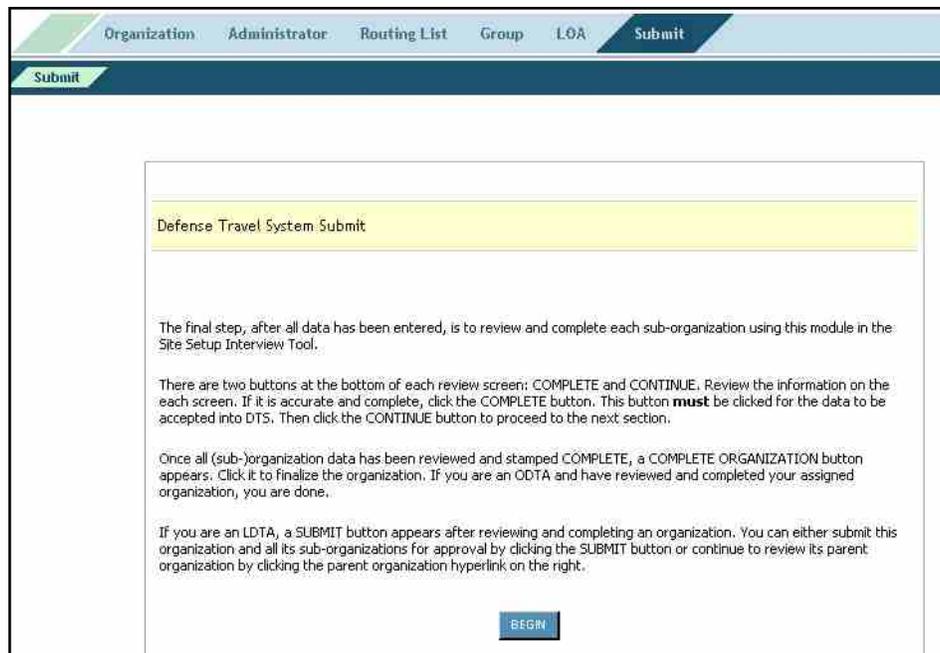


Figure C.5-1: Defense Travel System Submit Screen

### C.5.1 Review Organization Setup

After the ODTA or LDTA has entered all organization data, the LDTA should review the site or organization setup data. This review should occur prior to stamping each setup component COMPLETE. The administrative setup data must be reviewed before they can be considered complete. This review can be accomplished in the following ways:

**Review Method 1: Interview Mode.** In Site Setup Interview, the Interview Mode provides a step-by-step review process. The LDTA retraces the steps used to create the data, making edits while working through the process (Section C.3).

**Review Method 2: Edit Mode.** In Site Setup Interview, the Edit Mode provides access to the same data as the Interview Mode provides; however, the LDTA may select the data and the order in which to review them (Section C.4).

**Review Method 3: Status View Mode.** An LDTA who has on-site support or access to a user with permission level 7, may use the Status View mode to review the data (Section C.7.1).

The below steps explain the Interview Mode of review. The Submit process will be used to conduct the high-level review of the organization setup.

**Note:** The same screen will be used to stamp each part (organization, routing lists, groups, and LOAs) COMPLETE prior to submission.

1. Log on to the DTS User Welcome screen.
2. Select the **Administrative** drop-down list and select **Site Setup Interview**.
3. Select **Submit** from the navigation bar (Figure C.5-1).

The Defense Travel System Submit screen opens (Figure C.5-1).

4. Select **Begin** to start the Review process.

The first of the Organization Structure Review screens opens (Figure C.5-2).

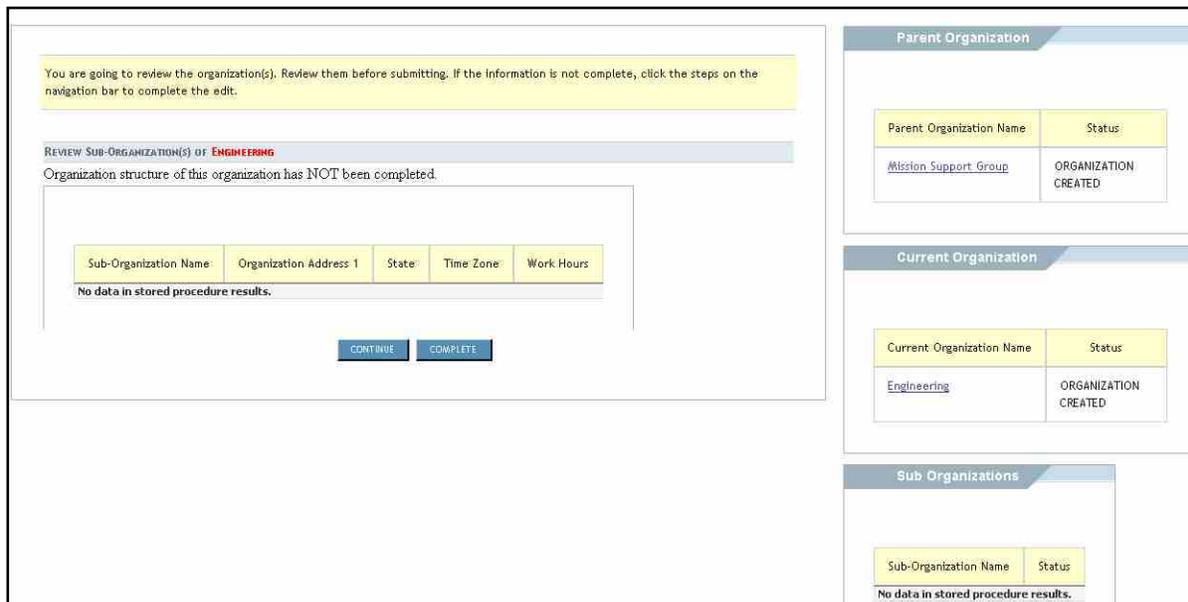


Figure C.5-2: Organization Structure Review Screen

The Organization Structure Review screens in the submission process have two sides.

- *The right side allows navigation through the organization structure.* It opens to the highest level organization designated for the DTA. This is indicated by the link to the organization name in the middle box, Current Organization. The lower box contains links to each of the suborganizations. The Parent Organization box above indicates the next higher organization. It is an active link only if the DTA has organization privileges in the Deployment Tool. The DTA navigates the organization structure by selecting the links to change the current organization.
- *The left side is the working space and displays the data for review.* There is no link to the details of the organizations displayed on the Organization Review structure screen.

The following buttons are used in the process and display only when needed:

- *CONTINUE*. This button advances through the process. It changes the screen to display the item for review. The process begins with suborganizations, advances to routing lists, then groups, and ends with LOAs.
- *COMPLETE*. This button displays as needed through the process for any data set (suborganizations, routing lists, groups, and LOAs) not yet stamped complete.

DTAs must receive the appropriate privilege when entered into the Deployment Tool in order to be able to stamp a data set *COMPLETE* for an organization (Section C.4.2.1).

Once all the data sets are stamped *COMPLETE*, the organization can be submitted to the Service or Agency Representative for migration.

*COMPLETE ORGANIZATION*. For ODTAs, this button will display when they have reviewed and completed their assigned organizations. Selecting it completes the process. The exception is for LDTAs who have reviewed and completed the organization data. They will see one more screen and a *SUBMIT* button as described below.

*SUBMIT*. This button will display on the Review Organization Structure screen if the LDTA is using the Submit process and has stamped all the data sets *COMPLETE*.

**Note:** To edit organization data, select the link to the appropriate component on the navigation bar and complete the change in the Interview or Edit Mode.

5. Select **CONTINUE**.  
-OR-  
Select **COMPLETE**.

The Review Routing Lists screen opens (Figure C.5-3).

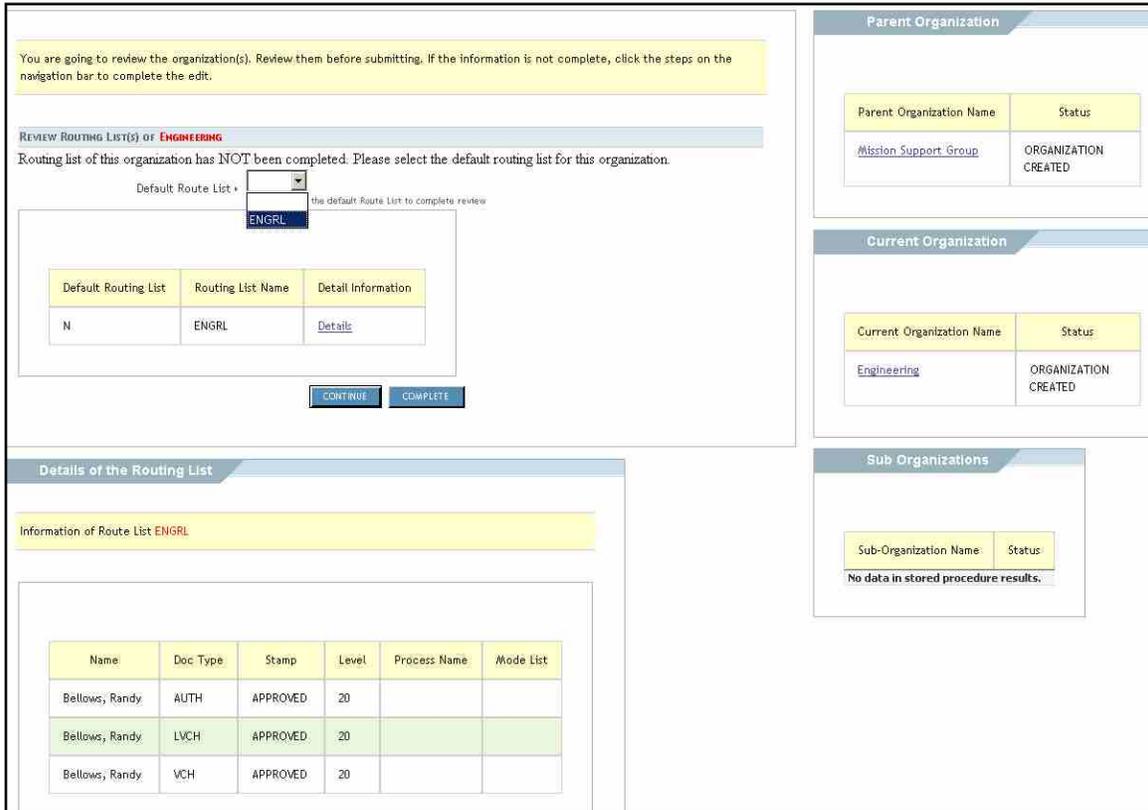


Figure C.5-3: Review Routing Lists Screen

The Review Routing Lists screen is the only screen in the Submit process that displays links on the left side of the screen. Selecting the Details link next to a routing list name will refresh the screen with the appropriate content.

6. Select **CONTINUE**.  
-OR-  
Select **COMPLETE**.

The Review Groups screen opens (Figure C.5-4). This screen does not display GGMRs.

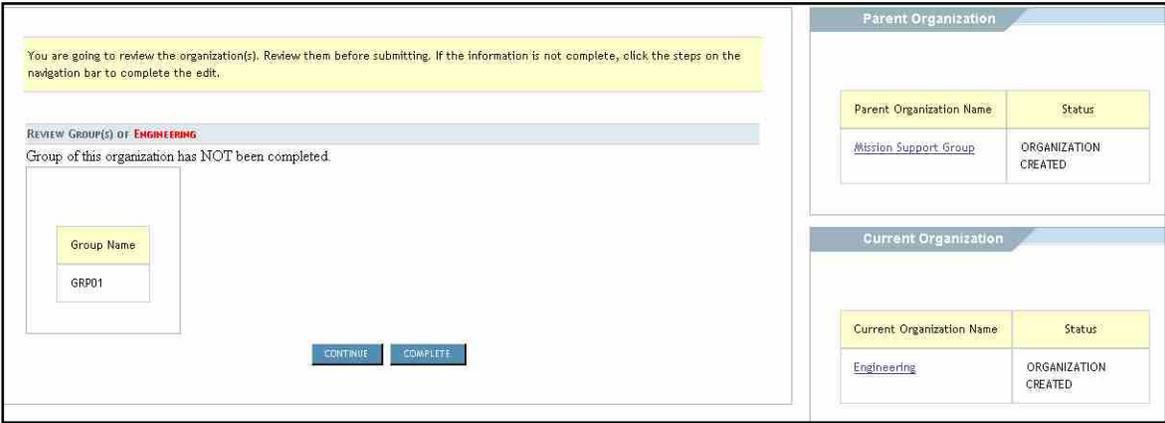


Figure C.5-4: Review Groups Screen

**Note:** The SUBMIT button only displays on the Review Organization Structure screen.

- 7. Select **CONTINUE**.
- OR-
- Select **COMPLETE**.

The Review LOAs screen opens (Figure C.5-5).

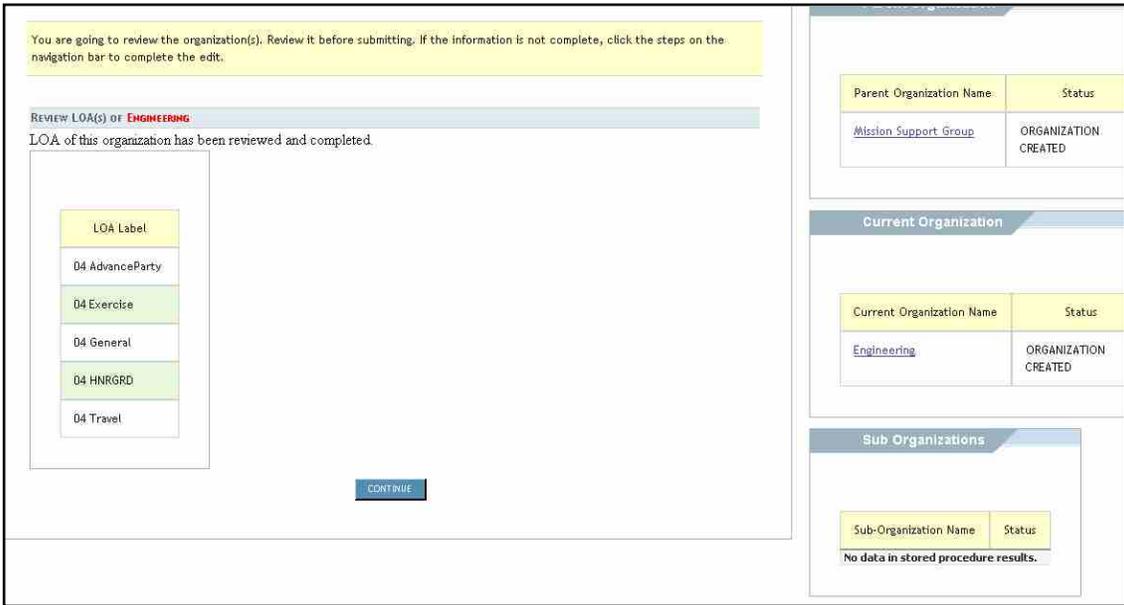


Figure C.5-5: Review LOAs Screen

The LOA labels are displayed for the current organization.

8. Select **CONTINUE**.
- OR-
- Select **COMPLETE**.

The Review Organization screen opens.

If all the data sets and all suborganization data are also stamped **COMPLETE**, the **SUBMIT** button will display. If an organization has been reviewed and completed, but its suborganizations have not, then that organization will not be available to be submitted (Figure C.5-6). In this case, select the suborganizations shown on the right side, and continue the process.

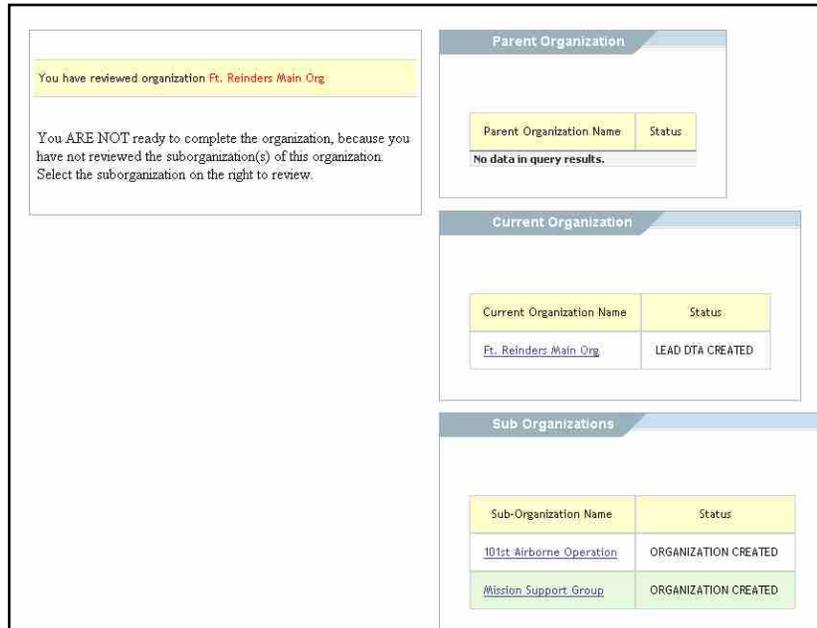


Figure C.5-6: Organization Structure Review Not Complete Screen

Once an organization's data set has been stamped **COMPLETE**, only the **CONTINUE** button will display. The **SUBMIT** button only displays when all the organization data and suborganization data are complete.

**Note:** Complete all suborganizations before completing the parent organizations.

### C.5.2 Complete Organization Setup

Use the below steps to review and stamp the organization data **COMPLETE**:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Interview**.
3. Select **Submit** from the navigation bar (Figure C.5-1).
4. Verify that all the organization components have been reviewed, are accurate, and have been stamped **COMPLETE** (Section C.5.1).

The COMPLETE ORGANIZATION button displays (Figure C.5-7).

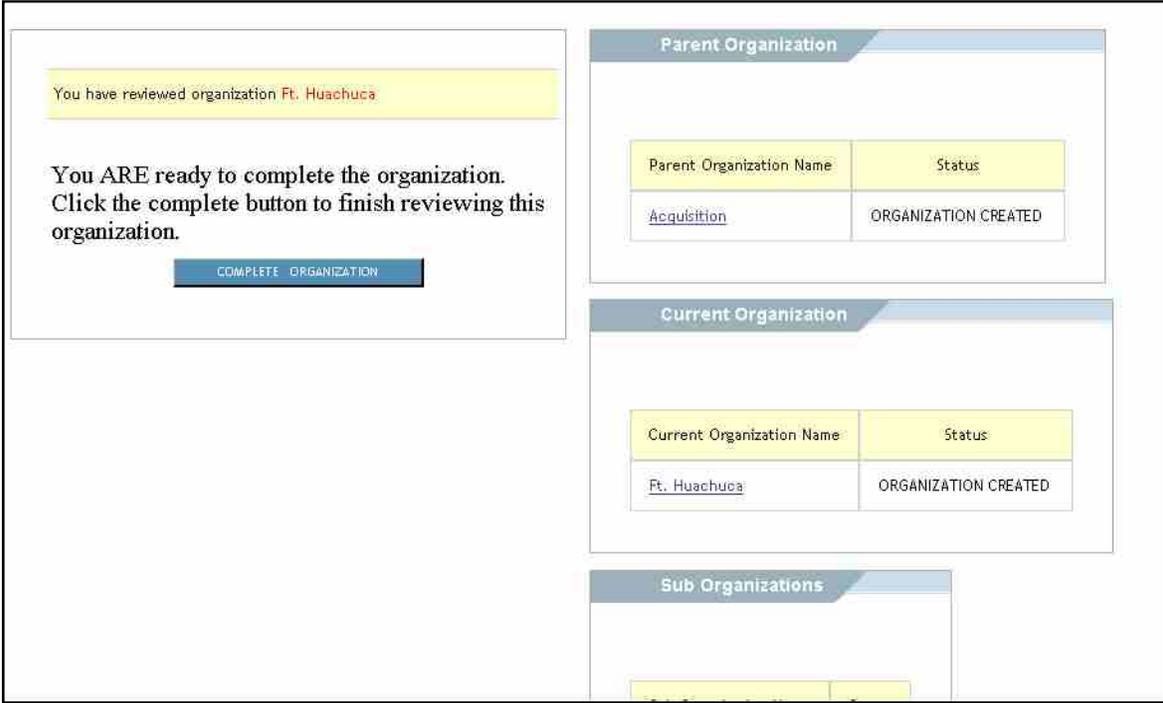


Figure C.5-7: Complete Organization Button

5. Select **COMPLETE ORGANIZATION**.

Once the ODTAs have reviewed and completed the assigned organization, the process is complete. LDTAs reviewing and completing the organization data will see a SUBMIT button (Figure C.5-8). Use this button to submit the organization data to the Service or Agency Representative.

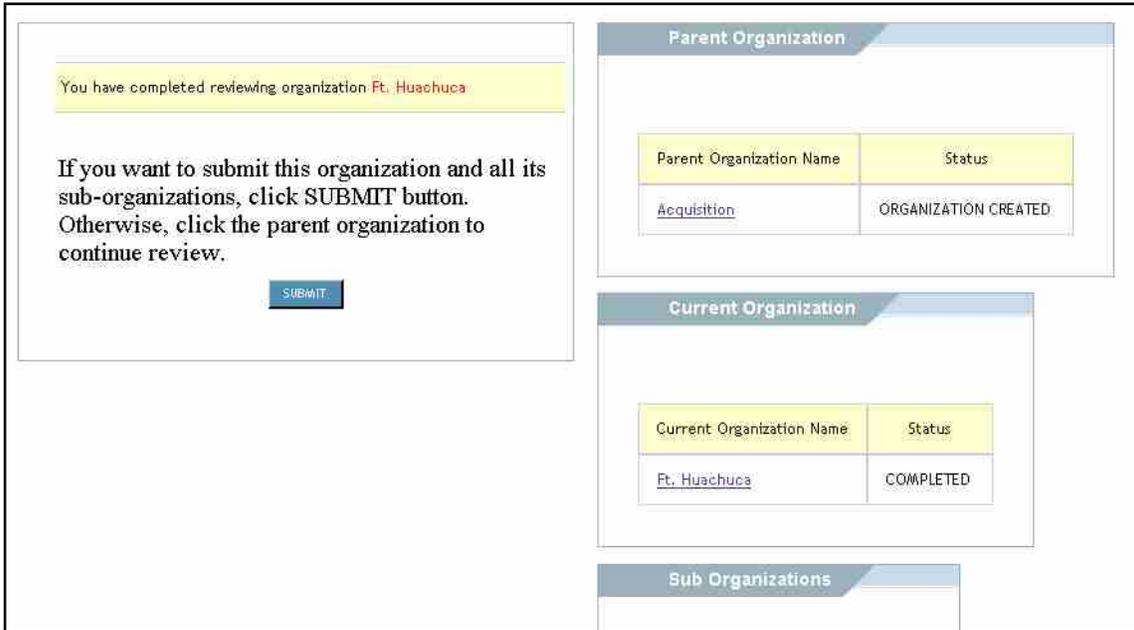


Figure C.5-8: LDTA Submit Screen

## **C.6 Self-Register All Officials Prior to Migration to Production**

The LDTA should self-register after reviewing, completing, and submitting the organization to the Service or Agency Representative for approval of migration to Production. The self-registration and acceptance of the LDTA, all ODTAs, ROs, and AOs should be complete before the Service or Agency Representative approves the setup migration. This allows the Service or Agency Representative to accept the LDTA in the proper organization with organization and group accesses, routing lists, and default LOAs assigned. The LDTA can do the same for ODTAs, ROs, and AOs, who then self-register prior to migration approval.

If the LDTA, ODTAs, ROs, and AOs (identified in the Deployment Tool) do not self-register prior to migration, they are created in DTS Production with user profiles. If any of them will travel, their profiles must be changed manually to travelers' profiles and the organization data completed. The travelers must complete their personal profiles when creating their first travel documents. If self-registration is delayed until after migration, the efficiencies of self-registration will be lost.

## C.7 Submit and Approve an Organization for Migration to Production

LDTAs will see a SUBMIT button displayed on the screen after the organization is complete. This organization and all its suborganizations can be submitted to the Service or Agency Representative for approval (Figure C.7-1).

You have completed reviewing organization Ft. Huachuca.

If you want to submit this organization and all its sub-organizations, click SUBMIT button. Otherwise, click the parent organization to continue review.

[SUBMIT](#)

Parent Organization	
Parent Organization Name	Status
<a href="#">Acquisition</a>	ORGANIZATION CREATED

Current Organization	
Current Organization Name	Status
<a href="#">Ft. Huachuca</a>	COMPLETED

Sub Organizations	
-------------------	--

Figure C.7-1: LDTA Submit Button

### C.7.1 LDTA Submits Organization Setup to Service or Agency Representative

The ODTA or LDTA must review all organization areas and stamp them COMPLETE in order to make the organization eligible for migration (Section C.5). The LDTA and other officials entered into the Deployment Tool self-register and are then accepted into Production (Section C.6). The LDTA may now submit the organization setup to the Service or Agency Representative for approval of migration into Production. Follow the below steps to submit the organization data to the Service or Agency Representative:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** in the menu bar and select **Site Setup Interview**.

The Welcome to Site Setup Interview screen opens.

3. Select **Submit**.
4. Review the information on each screen.
5. Select **COMPLETE** if all information is accurate and complete.

After all organization data have been reviewed and stamped COMPLETE, a COMPLETE ORGANIZATION button displays.

6. Select **COMPLETE ORGANIZATION**.

ODTAs review and complete the assigned organization to finish the process (Figure C.7-2).

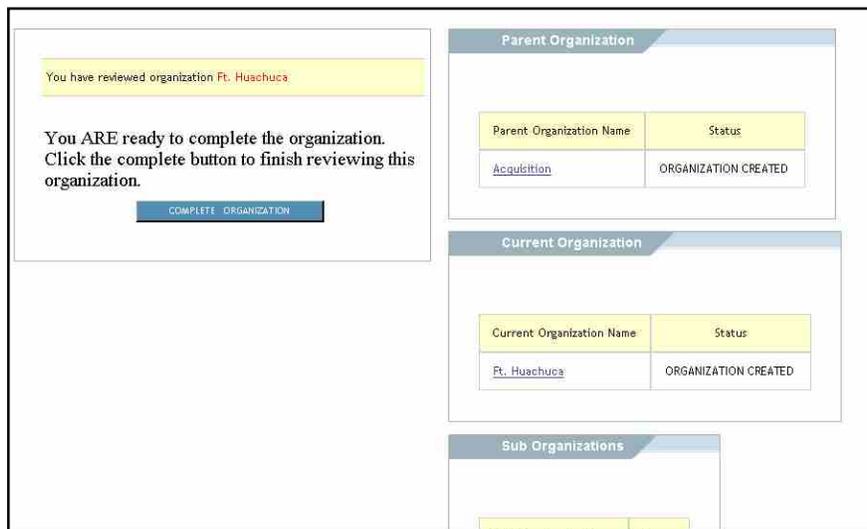


Figure C.7-2: Complete Organization Screen

A SUBMIT button displays for LDTAs after the organization has been reviewed and completed. This organization and all its suborganizations can be submitted for Service or Agency Representative approval (Figure C.7-3).

The screenshot displays a web interface for submitting an organization. On the left, a yellow message box states: "You have completed reviewing organization Ft. Huachuca". Below this, a text block instructs the user: "If you want to submit this organization and all its sub-organizations, click SUBMIT button. Otherwise, click the parent organization to continue review." A blue "SUBMIT" button is positioned below the text. On the right, there are three sections: "Parent Organization", "Current Organization", and "Sub Organizations".

Parent Organization	
Parent Organization Name	Status
<a href="#">Acquisition</a>	ORGANIZATION CREATED

Current Organization	
Current Organization Name	Status
<a href="#">Ft. Huachuca</a>	COMPLETED

Sub Organizations	

Figure C.7-3: LDTA Submit Screen

**Note:** If changes are necessary after submitting the organization setup data, use the DTA Maintenance Tool.

## C.7.2 Service or Agency Representative Reviews and Approves Organization Setup

After the LDTA and ODTAs have entered and reviewed their organization setup (Section C.5.1) and all components have been stamped COMPLETE, the SUBMIT button is selected. This sends the data to the Service or Agency Representative, who performs a final review before approval.

The Service or Agency Representative uses the status view to check the submission for compliance with policy and requirements. The Service or Agency Representative can select each link to see the information: the organization's data, routing list details, group structure, and LOAs.

Follow the below steps to begin the review and approval of a submitted organization:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** and select **Site Setup Admin**.

The Welcome to Site Setup screen opens.

3. Select the **Site List** link on the navigation bar.

The Site List screen opens.

4. Select the **site name**.

The Root Organizations screen opens (Figure C.7-4).

Delete	Edit	Root Organizations	Description	Current Status	Action Taken by	Action to be Taken
<a href="#">Delete</a>	<a href="#">Edit</a>	600	Aviation & Missile Command	LEAD DTA CREATED	Chris Reinders	<a href="#">Review and Approve</a>

Figure C.7-4: Root Organizations Screen

5. Select **Review and Approve**.

The Review and Approve screen opens (Figure C.7-5 and Figure C.7-6). The center section of the screen provides links to information about each of the organizations, DTAs, routing lists, groups, and LOAs.

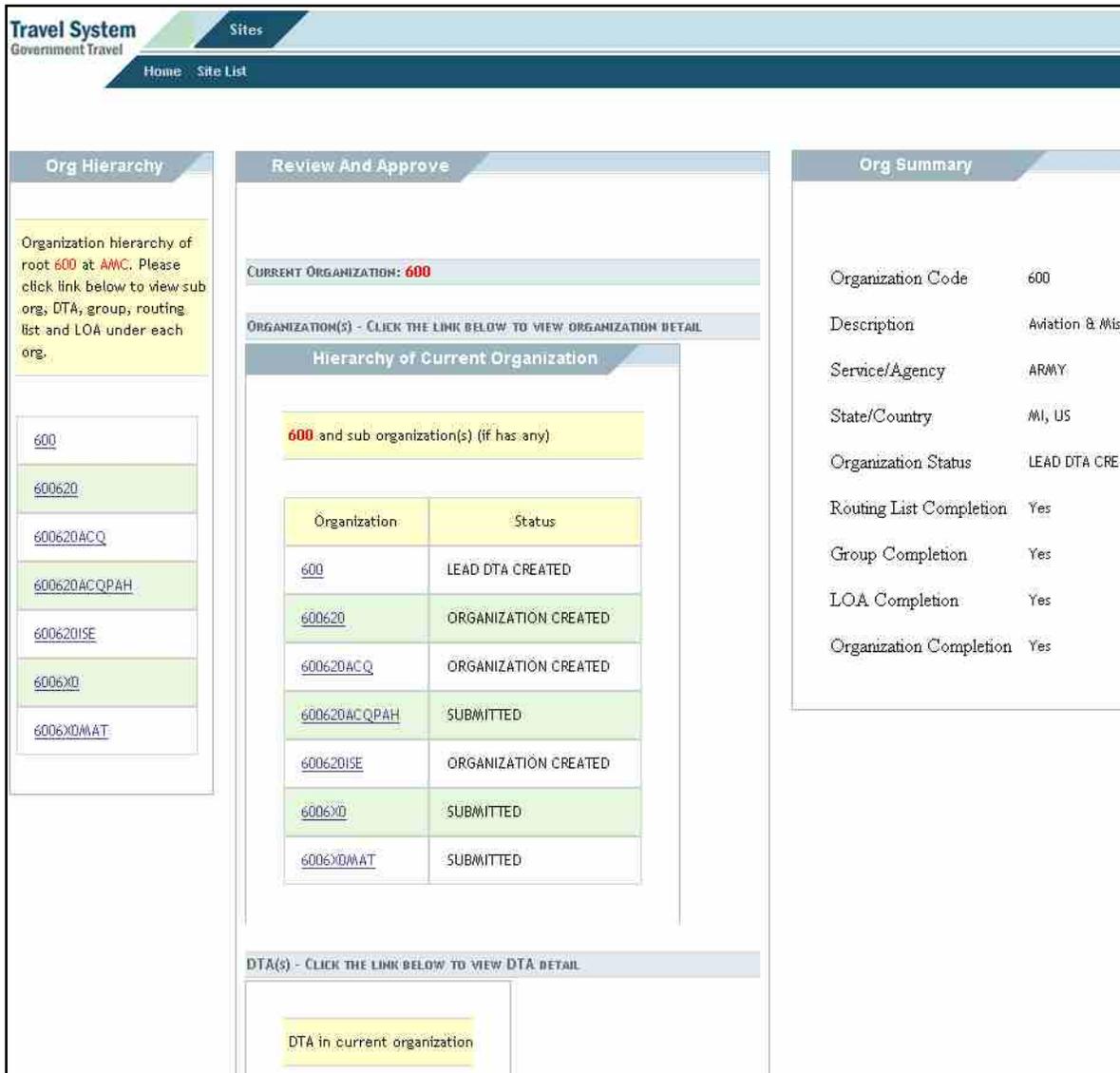


Figure C.7-5: Review and Approve Screen (Top)

6. Select each link to view the information.

The details and summaries will display in the right section of the screen. The following three buttons at the bottom of the screen (Figure C.7-6) will initiate the next action:

- APPROVE
- REJECT

- CANCEL

ACQRL

AMCRL

PAHRL

LOA(s) - CLICK THE LINK BELOW TO VIEW LOA DETAIL

LOA in current organization

Account	Format Map
<a href="#">04 AdvanceParty</a>	army02
<a href="#">04 Exercise</a>	army02
<a href="#">04 General</a>	army02
<a href="#">04 HNRGRD</a>	army02
<a href="#">04 Travel</a>	army02

Comments +

ATTENTION: CURRENT ORGANIZATION 600 WITH ALL ITS SUB ORGANIZATION(S) WILL BE APPROVED WHEN YOU CLICK THE 'APPROVE' BUTTON BELOW, OR REJECTED WHEN YOU CLICK THE 'REJECT' BUTTON. PLEASE MAKE SURE THIS IS THE ORGANIZATION YOU WANT TO SELECT.

APPROVE REJECT CANCEL

Figure C.7-6: Review and Approve Screen (Bottom)

7. Select **APPROVE** if the data appear to be complete and accurate.  
-OR-  
Select **REJECT** to return the data to the LDTA.  
-OR-  
Select **CANCEL** to close the screen without rejecting or approving.

**Note:** If the submission is rejected, a reason may be entered into the Comments field.

If there are problems with the data, the areas that are hindering the approval process are listed as links (Figure C.7-7).

The screenshot displays a web interface for data approval, divided into three main sections:

- Org Hierarchy:** Shows a tree structure of organizations. The root is 600 (AWC). Below it are 600620, 600620ACQ, 600620ACQPAH, 600620ISE, 600620, and 600620MAT.
- Review And Approve:** Contains a warning: "Please review the following: APPROVE process could not continue, because one or more of sub organization(s) below:". It lists several organizations with their statuses:
  - 600 with status = 'LEAD DTA CREATED'
  - 600620 with status = 'ORGANIZATION CREATED'
  - 600620ACQ with status = 'ORGANIZATION CREATED'
  - 600620ISE with status = 'ORGANIZATION CREATED'
 Below this is a table titled "Hierarchy of Current Organization" showing the status of each organization in the hierarchy.
- Routing List Detail:** Shows details for a routing list named "ACQRL". It includes a table of routing list items with columns: Name, Doc Type, Stamp, Level, Process Name, and Mode List.

Organization	Status
600	LEAD DTA CREATED
600620	ORGANIZATION CREATED
600620ACQ	ORGANIZATION CREATED
600620ACQPAH	SUBMITTED
600620ISE	ORGANIZATION CREATED
600620	SUBMITTED

Name	Doc Type	Stamp	Level	Process Name	Mode List
**CTO SUBMIT	AUTH	CTO SUBMIT	3	BYPASS PNR	
**CTO BOOKED	AUTH	CTO BOOKED	4	BYPASS PNR	
White, Mike	AUTH	REVIEWED	5		
Black, Barrie	AUTH	APPROVED	25		
Reinders, Chris	AUTH	APPROVED	25		
Reinders, Chris	LVCH	APPROVED	25		
Reinders, Chris	VCH	APPROVED	25		

Figure C.7-7: Data Approval Screen

8. Select the **organization name** on the left to show the organization data in the Organization Summary on the right.

The Organization Summary displays (Figure C.7-8).

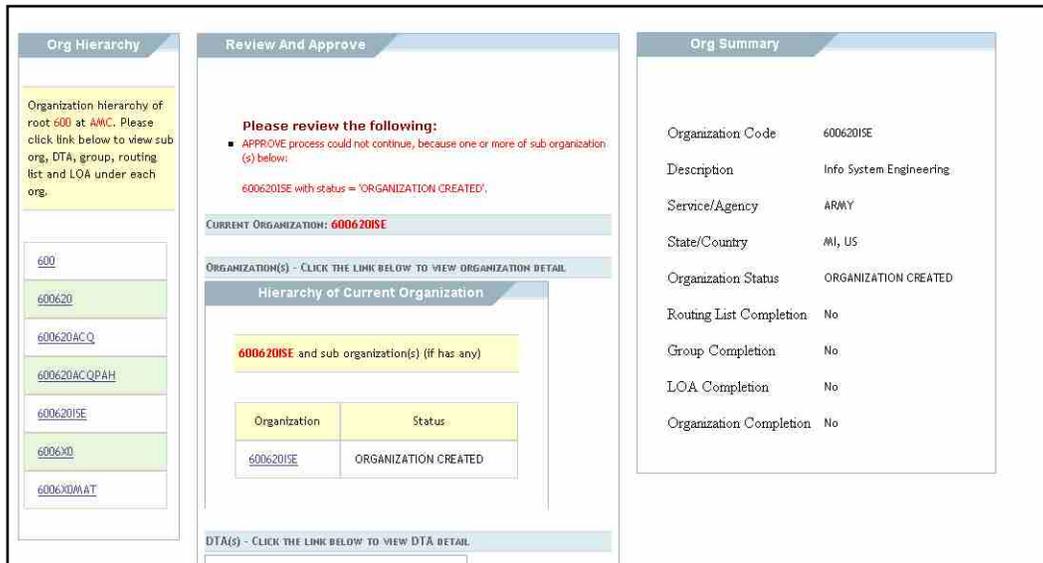


Figure C.7-8: Organization Summary Screen

- Read the Organization Summary to identify the reason that the organization has not been approved.

After the approved migration to Production, the LDTA and ODTAs use the DTA Maintenance Tool for all changes. Information on using the DTA Maintenance Tool is in the *DTA Manual*. The manual is available online at: [www.defensetravel.dod.mil/Sections/RL\\_DocLib.cfm](http://www.defensetravel.dod.mil/Sections/RL_DocLib.cfm).

**Note:** After approval there may be a delay in the database until the migrated data appear in Production. This delay may be as long as several hours, depending on the workload on the data center servers.

### C.7.3 Service or Agency Representative Rejects Organization Setup

The Service or Agency Representative can reject the organization data of a submission that is not acceptable. The LDTA will be notified via e-mail. When rejecting a parent organization, the Service or Agency Representative should reject all of that parent organization's suborganizations. In later reviews, it will not be possible to reject the parent organization if one or more of its suborganizations have been approved for migration. The Service or Agency Representative should work closely with the LDTA to resolve the problems.

## C.8 Postmigration Activities

Once the data have migrated to Production, DTAs can complete GGMRs in the DTA Maintenance Tool. New DTS users can now self-register, and DTAs can accept the new users into Production. Additionally, any changes to the organization setup can be made in the DTA Maintenance Tool.

### C.8.1 Complete GGMRs

Only one group can be added to an organization during Site Setup Interview. GGMRs added through Site Setup Interview may only go as high as the main organization. The DTA Maintenance Tool allows organizations to add GGMRs to higher-level organizations. After migration to Production, ODTAs may add additional groups through use of the DTA Maintenance Tool. The LDTA adds GGMRs to any groups belonging to higher-level organizations.

**Note:** See the *DTA Manual*, Chapter 6 for more information about groups and GGMRs. This document is accessible at: [http://www.defensetravel.dod.mil/Sections/RL\\_DocLib.cfm](http://www.defensetravel.dod.mil/Sections/RL_DocLib.cfm).

## C.9 Reports

Authorized users can use the Reports feature of the Deployment Tool to create reports that monitor the progress of site setup in DTS.

Each report allows the user to enter specific search criteria that will limit the search results. Document information is available in DTS for reporting within the last 15 months. The reports are available for download and require Microsoft Excel.

### C.9.1 Organization Totals Report

The Organization Totals Report provides a running count of the total number of organizations and suborganizations, routing lists, groups, and LOAs created.

The Organization Totals Report displays the following:

- Date on which the report was run
- Search criteria used to generate the report
- Number of organizations and suborganizations created to date
- Number of suborganizations created to date
- Number of routing lists created to date
- Number of groups created to date
- Number of LOAs created to date.

Follow the below steps to create an Organization Totals Report:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Admin**.

The Site Setup Admin screen opens.

3. Select **Reports** on the navigation bar.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

The Organization Totals Report criteria screen opens (Figure C.9-1). For a description of the Organization Totals Report criteria screen, see Table C.9-1.



Figure C.9-1: Organization Totals Report Criteria Screen

Table C.9-1: Organization Totals Report Criteria Screen Description

ORGANIZATION TOTALS REPORT CRITERIA SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Site Name	Drop-down list from which to select a site name in order to restrict the results to one site.
Organization	Drop-down list from which to select the organization to be included in the report.
Include Sub-Organizations	Check this box to include lower-level organizations in the results.
GENERATE REPORT	Button used to initiate generation of the report.

**Note:** This report is not available in Site Setup Interview.

4. Select the **drop-down list arrows** for the fields that are to be used as criteria and select the appropriate **values**.
5. If necessary, check the **Include Sub-Organizations** check box to include suborganizations.
6. Select **GENERATE REPORT**.

DTS creates a comma separated value (.csv) report in an Excel spreadsheet. The File Download dialog box, displays (Figure C.9-2).

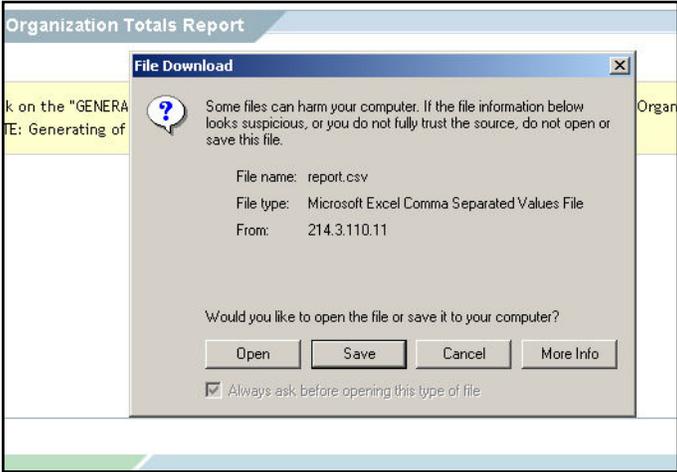


Figure C.9-2: File Download Dialog Box

- 7. Select **Open** to open the Excel report.
- OR-
- Select **Save** to save the report to the hard drive.
- OR-
- Select **Cancel** to close the report.
- OR-
- Select **More Info** to get help on downloading files.

The Organization Totals Report displays (Figure C.9-3).

	A	B	C	D	E	F	G	H	I
1	Site Name	Organizations/Sub-Organization	Total Sub-Organizations	Total Routing Lists	Total Group	Total LOAs			
2	Title: Organization Totals		Run Date: Wed Feb 01 09:51:38 EST 2006	Search Criteria:	Site Name:	Organization: DFCWTA509BWAUMED88			
3	DFCWTA509	DFCWTA509BWAUMED88	2	2	0	3			
4	DFCWTA509	DFCWTA509BWAUMED88A	1	0	1	1			
5	DFCWTA509	DFCWTA509BWAUMED88AB	0	0	0	2			
6									
7									

Figure C.9-3: Organization Totals Report

### C.9.2 Site / Organization Setup Progress Report

The Site / Organization Setup Progress Report allows the user to check the status of the setup for a site, to monitor its progress and preparedness for migration to Production. DTAs who have permission level 7 can run this report for all organizations to which they have organization access.

The Site Organization Setup Progress Report displays the following:

- Date on which the report was run
- Search criteria used to generate the report
- Routing list names

- Group(s)
- LOA label(s)
- LOA format maps
- Organization status
- Percent of the organization that is complete
- Status of whether the organization is complete or not.

Follow the below steps to create a Site / Organization Setup Progress Report:

1. Log on to the DTS User Welcome screen.
2. Mouse over **Administrative** on the menu bar and select **Site Setup Admin**.

The Site Setup Admin screen opens.

3. Select **Reports** on the navigation bar.

**Note:** The Select Organization drop-down list will require a selection if the user has access to multiple organizations.

The Organization Totals Report criteria screen opens by default (Figure C.9-1).

4. Select **Site / Organization Setup Progress Report** on the subnavigation bar.

The Site / Organization Setup Progress Report criteria screen opens (Figure C.9-4). For a description of the Site / Organization Setup Progress Report fields, see Table C.9-2.

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Sites Reports  
Organization Totals Site/Organization Setup Progress

Current Date: 02-01-2008

Site/Organization Setup Progress Report

Click on the "GENERATE REPORT" button to generate and download a csv file containing the Site/Organization Setup Progress records.  
NOTE: Generating of the csv file may take a few minutes.

Site Name ▾  
Service/Agency ▾  
Organization Status ▾  
Organization ▾ DFCWTA509BWAUMED88  
Include Sub-Organizations

GENERATE REPORT

Figure C.9-4: Site / Organization Setup Progress Report Criteria Screen

Table C.9-2: Site / Organization Setup Progress Report Criteria Screen Description

SITE / ORGANIZATION SETUP PROGRESS REPORT CRITERIA SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Site Name	Drop-down list from which to select a site name in order to restrict the results to one site.
Service/Agency	Drop-down list used to restrict results to one service or agency.
Organization Status	Drop-down list used to restrict results to organizations that are in the selected status.
Organization	Drop-down list from which to select the organization to be included in the report.
Include Sub-Organizations	Check this box, to include lower-level organizations in the results.
GENERATE REPORT	Button used to initiate generation of the report.

5. Select the **Site Name** drop-down list arrow and select the **site** to identify the site to which the organization belongs.
6. Select the **Service/Agency** drop-down list arrow and select the **service** or **agency** to restrict the report to one service or agency.
7. Select the **Organization Status** drop-down list arrow and select a status to limit results to organizations in a certain status.
8. Select the **Organization** drop-down list arrow and select the desired organization for the report.

The drop-down list includes all organizations to which the user has been specifically delegated as the DTA and those organizations to which the user has organization access.

**Note:** In Site Setup Interview, this criteria screen only has the following screen objects, which use the same descriptions as in the table:

- Organization Status
- Organization
- Include Sub-Organizations
- Generate Report

9. Select the **Include Sub-Organizations** check box to include suborganizations in the report, if desired.
10. Select **GENERATE REPORT**.

DTS creates a.csv report. The File Download dialog box, displays (Figure C.9-2).

11. Select **Open** to open the Excel report.  
-OR-  
Select **Save** to save the report to the hard drive.  
-OR-  
Select **Cancel** to close the report.  
-OR-  
Select **More Info** to get help on downloading files.

The Site / Organization Setup Progress Report displays (Figure C.9-5).

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Site Name	Organization/Sub-Organizat	Routing Li	Groups	LOA Label	LOA 10 X	Organizat	% Organizati	Organization Complete (Y/N)				
2	Title: Site/Organization Setup Progress		Run Date: Wed Feb 01 12:24:10 EST 2006		Search Criteria:		Site Name:	Organization:	DFCWTA509BWAUMED88				
3	DFCWT	DFCWTA509BWAUMED88	509RL		06 ADVANCI	4567^*****	Organizat	25%	N				
4	DFCWT	DFCWTA509BWAUMED88	509RL		06 EXERCIS	7894^*****	Organizat	25%	N				
5	DFCWT	DFCWTA509BWAUMED88	509RL		06 GENERA	1234^*****	Organizat	25%	N				
6	DFCWT	DFCWTA509BWAUMED88	509TRAIN		06 ADVANCI	4567^*****	Organizat	25%	N				
7	DFCWT	DFCWTA509BWAUMED88	509TRAIN		06 EXERCIS	7894^*****	Organizat	25%	N				
8	DFCWT	DFCWTA509BWAUMED88	509TRAIN		06 GENERA	1234^*****	Organizat	25%	N				
9													

Figure C.9-5: Site / Organization Setup Progress Report

### C.9.3 Self-Registration Metrics Report

The Self-Registration Metrics Report tracks the length of time that self-registrations remain in the following statuses:

- Submitted
- Self-Registration
- Awaiting Approval
- Incomplete Self-Registration.

The Self-Registration Metrics Report displays the following:

- Current date
- Site name
- Organization/sub-organization
- DTS organization description
- Traveler SSN (last four digits)
- Traveler last name
- Traveler first name
- E-mail address
- Status
- Status age
- Create date
- Submit date.

Follow the below steps to create a Self-Registration Metrics Report:

1. Log on to the DTS User Welcome screen.

2. Mouse over **Administrative** on the menu bar and select **Self-Registration Admin** (Figure C.9-6).

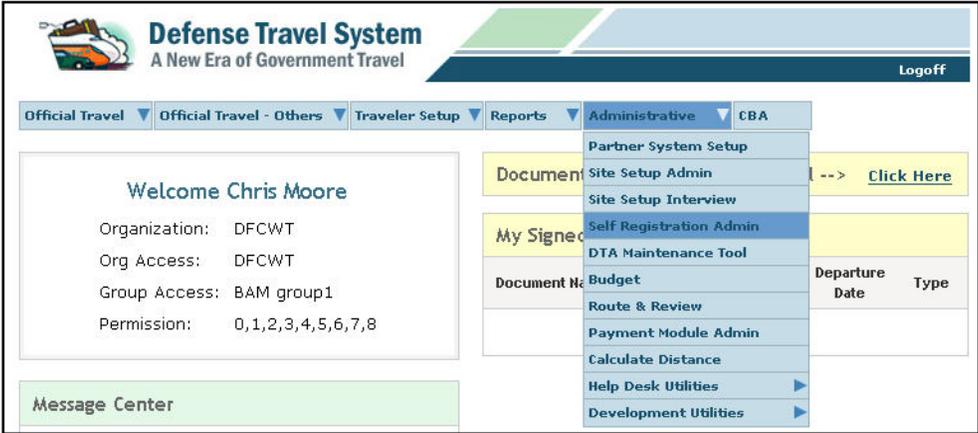


Figure C.9-6: DTS User Welcome Screen - Self-Registration Admin

The Self-Registration Admin Welcome screen opens (Figure C.9-7).

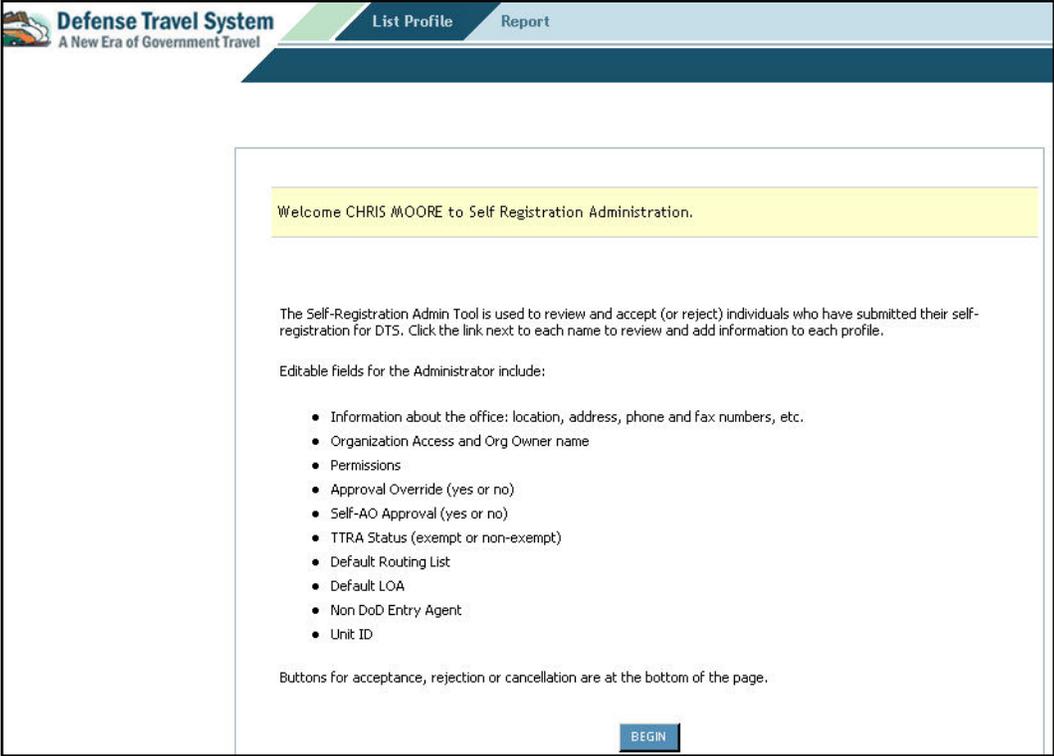


Figure C.9-7: Self-Registration Admin Welcome Screen

3. Select **Report** on the navigation bar.

The Self-Registration Metrics Report criteria screen opens (Figure C.9-8). For a description of the Self-Registration Metrics Report criteria screen, see Table C.9-3.

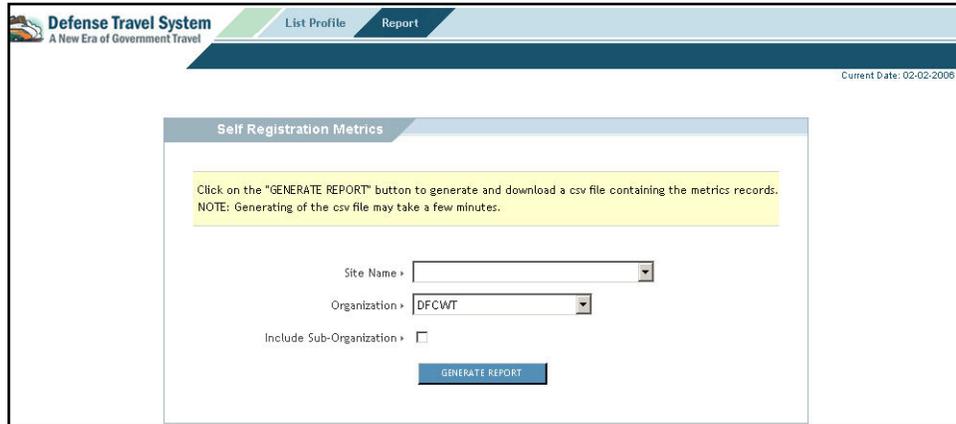


Figure C.9-8: Self-Registration Metrics Report Criteria Screen

Table C.9-3: Self-Registration Metrics Report Criteria Screen Description

SELF-REGISTRATION METRICS REPORT CRITERIA SCREEN DESCRIPTION	
FIELD OR OBJECT	DESCRIPTION
Site Name	Drop-down list from which to select a site name in order to restrict the results to one site.
Organization	Drop-down list from which to select the organization to be included in the report.
Include Sub-Organizations	Check this box to include lower-level organizations in the results.
GENERATE REPORT	Button used to initiate generation of the report.

4. Select the drop-down list arrow and select the correct value to complete the criteria fields.
5. Select **GENERATE REPORT**.

DTS creates a.csv report. The File Download dialog box displays (Figure C.9-2).

6. Select **Open** to open the Excel report.  
-OR-  
Select **Save** to save the report to the hard drive.  
-OR-  
Select **Cancel** to close the report.  
-OR-  
Select **More Info** to get help on downloading files.

The Self-Registration Metrics Report displays (Figure C.9-9).

	A	B	C	D	E	F	G	H	I	J	K	L
1	Current Date	Site Name	Organizations/Sub-Organization	DTS Organization Description	Traveler SSN	Traveler Last Name	Traveler First	Email Address	Status	Status Age	Create Date	Submit Date
	Title: Self Registration Metrics Title: Mon Jan 31 12:27:54 EST 2005 Search Criteria: Site Name: Organization: D Include Sub-Organizations: Y											
2												
3	27:53.0	Pre-Deployment	DA		***.**-0005	Randall	Brian	gary.zhou@ngc.com	Submitted	6	2004-09-14 15:47:58.0	2005-01-25 14:38:43.0
4	27:53.0	Pre-Deployment	DF123		***.**-3990	Reinders	Eric	barrie.black@ngc.com	Not Submitted	124	2004-09-29 16:49:02.0	
5	27:53.0	test	DODEA1111111111	DOD Education Defense Aquisition	***.**-9898	test	user-4	manleen.kaur@ngc.com	Submitted	143	2004-09-09 15:49:35.0	2004-09-10 14:53:24.0
6	27:53.0	test1	DEFENSEAQ1111111		***.**-2222	McDaniel	Kelly	manleen.kaur@ngc.com	Submitted	143	2004-07-13 14:40:32.0	2004-09-10 14:39:20.0
7												
8												

Figure C.9-9: Self-Registration Metrics Report

## Attachment C1: Worksheet for Self-Registration

<b>General Information</b>	
First Name	
Last Name	
Middle Initial	
SSN	
Gender	
Email Address	
<b>Mailing Address</b>	
Mailing Address, City, State and Zip/Postal Code	
<b>Required Work Information</b>	
Civilian/Military Status	
Title/Rank	
Tech Status	
Organization Name	
Office Address, City, State and Zip/Postal Code	
Time Zone	
Work Hours	
Emergency Contact Name and Phone Number	
<b>Electronic Funds Transfer Data</b>	
Account Type – Checking or Saving	
Account Routing Number	
Account Number	
Account Number	
<b>Government Charge Card (GOVCC)</b>	
Charge Card Status	
Account Number	
GOVCC Exp. Date	
<b>Optional Work Information</b>	
Printed Organization	
Present Duty Station	
Miles from Office to Airport	
Office Phone	
Office Fax	
Office Mail Stop	
<b>Foreign Travel Information</b>	
First Name	
Last Name	
Middle Initial	
Birth Date	
Passport Number	
Issuing City	
Issuing State	
Expiration Date	

## Attachment C2: Self-Registration Screens

Logged In As: Eric Defense-A  
Screen ID: 8000.1

Close Window  
Help for this screen

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Home Basic Information Additional Information Submit Self-Registration

Current Date: 02-19-2010

Welcome to the Self Registration Tool.

Your user/traveler profile has been started but not completed; please finish prior to submitting the user/traveler profile for acceptance.

If you already have an existing user profile, and inadvertently created a self registration record, then click [here](#) to delete your staging profile. You will then be able to re-login and activate your production profile.

This is where you enter the data that goes into your DTS Personal Profile.

In the *Basic Information* section, the following fields are mandatory (indicated by an asterisk) and must be provided in order to submit your self registration:

- E-mail Address
- Mailing Address (Street, State/Country, and Zip/Postal Code)
- Organization
- Electronic Funds Transfer (EFT) information (bank account and routing information). Payment by EFT is mandatory per the DOD Financial Management Regulations. If you don't have EFT information, please contact the DTA for assistance to have your profile created.

Click on the [Basic Information](#) above to complete your profile.

The following *Additional Information* is also required in order to submit your self registration:

- Residence Address (Street, State/Country, and Zip/Postal Code)
- Residence Phone

You should have this information available prior to leaving the Self Registration home page and continuing with the self registration process.

The following fields (indicted in **bold**) are required to save the page on which the information is entered. This information is needed, at a minimum, if you wish to abandon the self registration process, but save the information added and then return later to complete the process:

- Gender
- Service/Agency of Assignment (Street, State/Country, and Zip/Postal Code)
- Time Zone (of your permanent duty station)

### Self-Registration Tool Welcome Screen

Logged In As: Eric Defense-A  
Screen ID: 8001.1

Eric Defense-A  
8001.1

Case Window  
Help for this screen

Defense Travel System  
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Home Basic Information Additional Information Submit Self-Registration

Current Date: 02-18-2010

Field with "\*" is a required field when you submit on the BASIC INFORMATION page.  
Fields with a bolded Field Name are required to save data on the BASIC INFORMATION page.

**MANDATORY INFORMATION**

**GENERAL INFORMATION**

First Name Eric  
Last Name Defense-A  
Middle Initial   
SSN 999992881  
Gender Male   
\* Email Address   
Email Address   
\* Please Re-enter the Email Address that you entered above for the validation purpose.

**MAILING ADDRESS**

\* Mailing Street 1   
Mailing Street 2   
\* City   
\* State / Country VA   
\* Click on the icon to select a value  
\* Zip / Postal Code   
Is this the same as Residence Address?  Yes  No (if not, we'll ask you for it on the Additional Information page.)

**REQUIRED WORK INFORMATION**

Civilian / Military   
Title / Rank   
Active Reserve Category   
Military Branch of Service   
Tech Status  Yes  No  
Air Crew Status  Yes  No  
\* Organization   
\* Click on the icon to select a value  
Service / Agency of Assignment ACLANT  
Office Street 1   
Office Street 2   
City   
State / Country VA   
\* Click on the icon to select a value  
Zip / Postal Code   
Time Zone GMT   
Work Hours   
Emergency Contact Name   
Emergency Contact Phone Number   
\* Format: 999-999-9999 x9999; up to 20 characters

Recommended Information Screen - Top

ELECTRONIC FUNDS TRANSFER DATA	
Account Type >	<input checked="" type="radio"/> Checking <input type="radio"/> Saving <input type="radio"/> None
Account Routing Number >	<input type="text"/> <small>Click on the icon for help</small>
Account Number >	<input type="text"/>
Account Number >	<input type="text"/> <small>Please re-enter the account number that you entered above for the validation purpose.</small>
TRAVEL RESERVATION INFORMATION	
GOVERNMENT CHARGE CARD (GOVCC)	
Advance Authorization >	<input type="text" value="ADVANCE AUTH"/>
Account Number >	<input type="text"/>
GOVCC Exp. Date >	<input type="text"/> <small>Format is mm/dd/yyyy</small>
ADDITIONAL INFORMATION	
Printed Organization >	<input type="text" value="TEST1"/>
Present Duty Station >	<input type="text"/>
Miles from Office to Airport >	<input type="text"/>
Office Phone >	<input type="text"/> <small>Format: 999-999-9999 x9999; up to 20 characters</small>
Office Fax >	<input type="text"/> <small>Format: 999-999-9999; up to 20 characters</small>
Office Mail Stop >	<input type="text"/>
Organization Email >	<input type="text"/>
Unit ID (UIC/RUC/PASSCODE) >	<input type="text"/>
FOREIGN TRAVEL INFORMATION	
OFFICIAL (NO-FEE) PASSPORT INFORMATION	
First Name >	<input type="text"/>
Last Name >	<input type="text"/>
Middle Initial >	<input type="text"/>
Birth Date >	<input type="text"/> <small>Format is mm/dd/yyyy</small>
Passport Number >	<input type="text"/>
Issuing City >	<input type="text"/>
Issuing State / Country >	<input type="text"/> <small>Click on the icon to select a value</small>
Expiration Date >	<input type="text"/> <small>Format is mm/dd/yyyy</small>
REGULAR (TOURIST) PASSPORT INFORMATION	
First Name >	<input type="text"/>
Last Name >	<input type="text"/>
Middle Initial >	<input type="text"/>
Birth Date >	<input type="text"/> <small>Format is mm/dd/yyyy</small>
Passport Number >	<input type="text"/>
Issuing City >	<input type="text"/>
Issuing State / Country >	<input type="text"/> <small>Click on the icon to select a value</small>
Expiration Date >	<input type="text"/> <small>Format is mm/dd/yyyy</small>
<input type="button" value="SAVE AND PROCEED"/> <input type="button" value="CANCEL WITHOUT SAVING"/>	

Recommended Information Screen - Bottom

Logged In As: Eric Defense-A  
Screen ID: 8001.2  
Close Window  
Help for this screen

**Defense Travel System**  
A New Era of Government Travel

Home Basic Information **Additional Information** Submit Self-Registration

Current Date: 02-19-2010

Field with "\*" is a required field when you submit on the ADDITIONAL INFORMATION page.

**RESIDENCE ADDRESS**

\* Residence Street 1 >

Residence Street 2 >

\* Residence City >

\* Residence State / Country > VA   
Click on the icon to select a value

Residence Zip / Postal Code >

Miles from Home to Airport >

\* Residence Phone >   
Format: 999-999-9999 x9999; up to 20 characters

Residence Fax >   
Format: 999-999-9999; up to 20 characters

**AIR TRAVEL PREFERENCES**

Airport >    
Click on the icon to select a value

Preferred Seating >

Special Meals >

Special Needs >

**FREQUENT FLYER**

- Add

Edit	Delete	Frequent Flyer No	Airline	Member No	Member Status
No data in query results.					

**LODGING PREFERENCES**

Preferred Lodging >

Lodging Special Needs >

**RENTAL CAR PREFERENCES**

Preferred Rental Car >

Rental Car Special Needs >

Personal Remarks >

**SMOKING PREFERENCES**

Smoker >  No  Yes

Additional Information Screen

*This page is left blank intentionally.*