



MANUAL



DTA Manual, Chapter 5: Routing Lists

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Revision History

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1.0	04/25/18	Defense Travel Management Office (DTMO)	Changed format, updated language & screenshots	All
1.1	06/22/18	DTMO	Updated URLs to “https” vs. “http”	Throughout
1.2	08/17/18	DTMO	Changed access to DTA Maintenance Tool through DTS Dashboard	Section 4
1.3	08/12/19	DTMO	Conducted annual review Updated Route and Review to Trips Awaiting Action	All Page 8
1.4	02/24/20	DTMO	Update Certifying Official description	Page 9
1.5	11/12/20	DTMO	General review Updated DTA Manual links	Throughout
1.6	01/28/20	DTMO	General review Added DTA Manual link, Appendix E Updated Message Center screen shot	Throughout Section 2.6 Section 4
1.7	08/12/22	DTMO	Updated to Rebranded effort New screen shots Updated Table 5-3	Throughout Throughout Page 19 and 20
1.8	08/31/23	DTMO	General review Updated footers	All Throughout

Chapter 1: Introduction to DTS Routing Lists

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

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

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

1.1 Default Routing List

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

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

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

1.2 Additional Routing Lists

Each organization will have a default routing list for all the travelers to use, but you can have different routing lists for different sorts of travel (e.g., training or medical travel). By creating more than one routing list, you can easily tailor the routing process supporting each organization's needs. If your organization contains multiple routing list, be sure to clearly name them, so travelers understand which one to use for their trips.

Once you establish additional routing lists, you may replace the default routing list in a traveler's personal profile with a newly created one or wait to make the change once travel is necessary (see Section 1.3).

1.3 Using Routing Lists in a DTS Document

Your organization may have a simple setup with every traveler using the *same* default routing list or a more complex setup in which your travelers have *different* default routing lists in their profiles. If a traveler requires a different routing list consistently, you can use the **DTA Maintenance Tool's People** module to update the traveler's default routing list in their DTS profile. For more information on updating personal profiles in DTS, see the [DTA Manual, Chapter 7: People](#).

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

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

Chapter 2: Routing Elements

The routing list defines the path the document must take and the specific actions by a person or system. A routing list contains a series of *routing elements*. You must define the following information for each routing element:

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

***Note:** See Section 2.5 for more about Process Name.

2.1 Document Type

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

2.2 Document Status

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

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

2.3 Signature Name

DTS records who performs actions on documents. For a routing list, you identify the person and then during stamping action, DTS records the name of Routing Official (i.e., Reviewer and Approver) who applies the status stamp on the **Digital Signature** page.

2.4 Level

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

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

Notes:

1. Although DTS lists the level numbers in sequence, the numbers do not have to be consecutive. In fact, it's best to leave gaps between numbers to allow you to add an additional Routing Official later without having to renumber all the levels below the new one.

2. Future routing list maintenance will be easier if you assign the same level number to the same Routing Official in every routing list. For example, ROs are always at step 5, COs at step 10 and AOs at step 20.
3. To prevent routing stopping should a Routing Official be unavailable, a best practice is to always put multiple personnel at the same level (e.g., three AOs at level 25).
4. A routing list can only have a single document status at a level. That is, you can't have both **REVIEWED** and **APPROVED** at level 15.

2.5 Process Name (Conditional Routing)*

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

Conditional routing can appear on any travel document, but its use is *optional*.

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

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

2.6 Routing Officials

Routing Officials must have permission level 0 to access DTS and permission level 2 to access **Trips Awaiting Action** module. A document appears in **Trips Awaiting Action** when it is time for the RO to perform necessary checks and apply their designated stamp. The Routing Officials (e.g., Reviewer, Approver) can apply the stamp assigned to them by the routing list and also use the **SIGNED** and **RETURNED** stamps as appropriate. Once action is complete, the document is removed from the list.

DTS imposes two specific rules regarding **SIGNED** and **CANCELLED** stamps.

- A Routing Official can stamp a document **SIGNED** for a traveler, but DTS will not allow them to also stamp the document with their designated routing list stamp such as **REVIEWED** or **APPROVED**. In this situation, another Routing Official would review and stamp the document.
- Only the Authorizing Official which for DTS that is the Approver can apply the **CANCELLED** stamp to a document.

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

2.6.1 Common Routing Officials

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

- **Authorizing Official (AO)**. The AO applies the **APPROVED** stamp to documents to allow the trip to proceed (authorizations) or the requested claim to be paid (vouchers). The AO is the only mandatory

Routing Official on a routing list and must always be the last step for all document types. Never use conditional routing on levels that include an AO, as they must see every document.

- **Reviewing Official (RO).** The RO applies the **REVIEWED** stamp* to documents that they have reviewed and found no errors. They have no fixed responsibilities at the DoD level; the organization determines their specific duties. ***Note:** When the RO is on the routing list using conditional routing, you may assign them the **REVIEWED1**, **REVIEWED2**, or **REVIEWED3** stamp.
- **Certifying Official (CO).** The CO applies the **CERTIFIED** stamp to verify that enough money remains in the organization's travel fund to pay for a trip.

Note: AO's/CO's must complete required training and be appointed in writing (*DD Form 577*) to serve in this role. Follow your Component and/or Local Business rules for appointing and revocation of DTS roles.

As a document processes, individuals and the system apply different stamps.

- The current status is viewable by the traveler under **My Travel Documents**, and by viewing the **Digital Signature** page to see all pending and previous actions.
- Individuals with group access can view the document status at any time, using **Traveler Lookup**. The traveler's documents with the status is viewable under **Managing Trips for: <traveler name>** and by viewing the **Digital Signature** page.
- The RO's see the status under **Trips Awaiting Action** when a document requires their attention.

DTS communicates the document status using email to the following individuals:

- **Traveler.** DTS emails the traveler for *completed* document stamping actions by the system or an individual (e.g., **CTO BOOKED**, **REVIEWED**).
- **Routing Officials.** DTS emails Routing for *pending* actions (e.g., awaiting **REVIEWED**) and not when another Routing Official completed a stamping action. **Note:** If multiple Routing Officials are at the same level (which is a recommended practice), they all receive the same email. When one of them stamps the document, DTS removes the document from the other Routing Officials' queue, as no current action is required.

DTS provides other emails to communicate status such as **PAID** and **REJECT**. For more information on DTS emails, see the [DTA Manual, Appendix E: Emails](#).

2.6.2 Delegate Signature Authority

Typically, a routing list contains multiple individuals for each stamp such as **APPROVED** to manage document review actions. When someone is unavailable, then another individual on the routing list takes appropriate action. If a Routing Official will be unavailable for an *extended* period, they can *temporarily* assign another person/Routing Official (not listed on the routing list) to review documents for them *during* their absence.

DTS allows a Routing Official to entrust their **Signature Authority** to another using the **Delegate Authority** function. To delegate **Signature Authority** to another individual, the designated individual must have permission level 2 and be in the same organization of assignment. A Routing Official should only delegate their **Signature Authority** to a knowledgeable and properly appointed individual. To learn more about how to use this DTS feature, view the [Desktop Guide for Authorizing Officials, Chapter 5](#) for **Delegation Authority**.

As the newly designated RO is not on the routing list, they receive a DTS email when a document needs their attention. Once the RO completes the review (i.e., stamps the document), DTS removes the document from their and the other Routing Officials' queue for that level and moves the document to the next level.

Removing Delegation:

Once the Routing Official returns, the individual should remove the delegated **Signature Authority** and resume their duties. **Note:** See the [Desktop Guide for Authorizing Officials, Chapter 5](#) for the **Delegation Authority Removal** process. The transfer of responsibility or **Delegated Authority** remains in place until the person who delegated it removes it or until a DTA detaches the delegator's profile removing the designated selection. In Section 5.2 of this document, see how to run a view list to identify individuals who did not remove their delegation. Then view the [DTA Manual, Chapter 7: People](#), so you can remove the selection for them by using the **Detach** profile process.

2.7 Stamps, Status Codes, and Action Codes

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

- Indicate the steps of the electronic approval process
- Indicate system-generated actions
- Select as criteria for travel reports
- Record the history of a document

Every time a document is stamped, DTS records it in the document history with the status code, user name, date, and time. A stamp may or may not have action codes assigned to it. Each action code causes a specific electronic procedure to occur. Action codes initiate actions such as route (sends the document to the Routing Officials at the next level of the routing list) and emailtrav (sends an email to the traveler).

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

2.8 Minimum Routing List Requirements

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

- **CTO SUBMIT** (Level 2). Routes an authorization to the TMC, if the traveler used the DTS Travel module to make travel arrangements.
- **CTO BOOKED** (Level 3). Indicates that the TMC performed quality checks for the requested reservations or made travel arrangements for the traveler.
- **APPROVED**. Must always be at the highest level (i.e., it's the last step). **Note:** Only the Authorizing Official or AO can apply **APPROVED** to a DTS document.

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

Chapter 3: Organization Chart and Routing List Example

In DTS, an organization's profile establishes the traveler's assignment in which contains routing lists, groups, profiles, LOAs, and Budgets. Figure 5-1 shows a sample organization chart with several routing lists. Each organization has a default routing list and may have at least one alternate routing list. The organization that owns a routing list is responsible for its maintenance.

Note: The DTS organization structure displayed in this manual are for training purposes only. The [DTA Manual, Appendix Q](#) provides primary organization structures for each Component. Before creating new DTS organizations, contact your Component Representative for guidance.

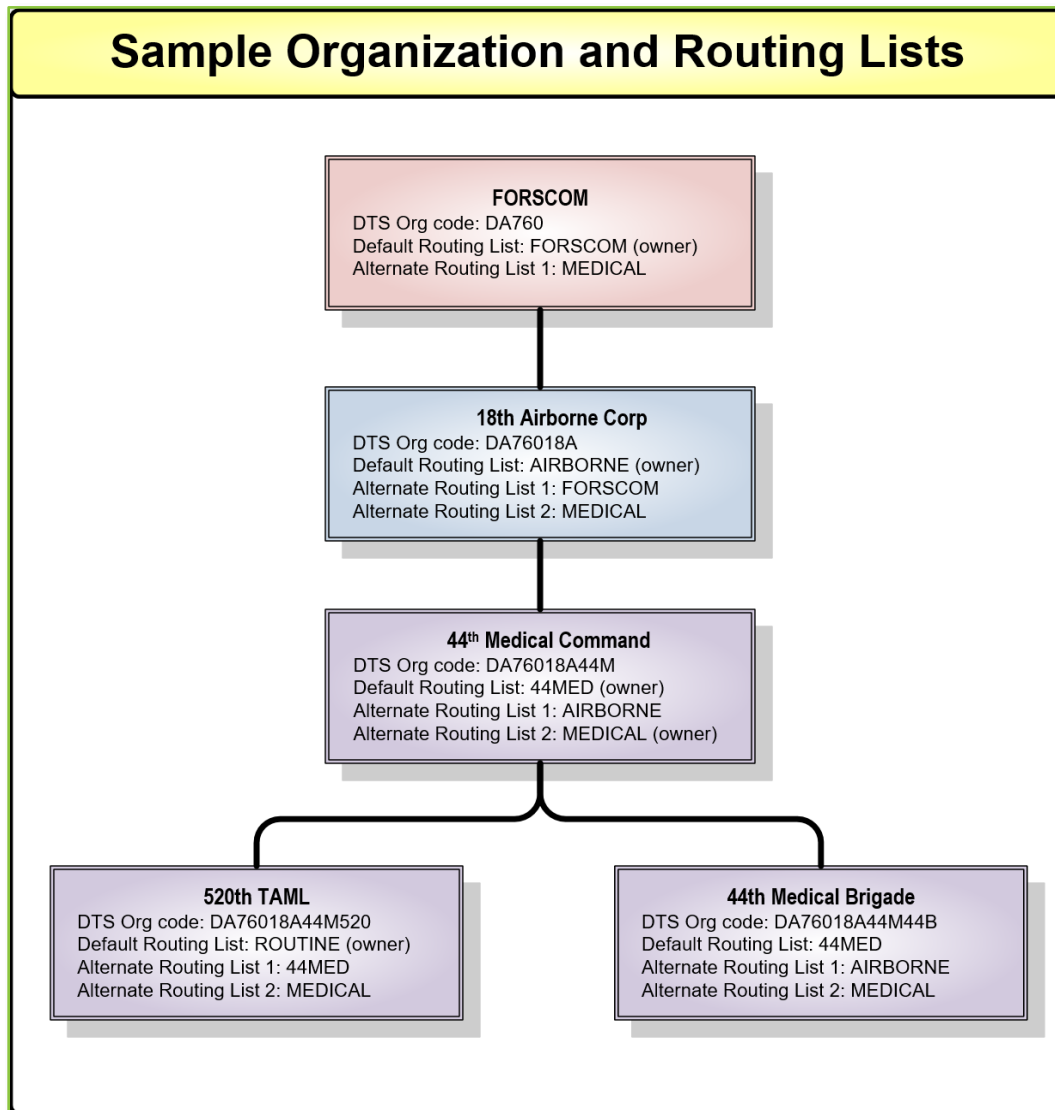


Figure 5-1: Sample Organization Chart

Table 5-1 shows a sample routing list with the key points called out. **Note:** Levels in a routing list are not associated to permission levels. The routing levels signify the order in which each action will occur.

Table 5-1

SAMPLE ROUTING LIST				
Document Type	Document Status	Signature Name	Level	Process Name
AUTH ¹	CTO SUBMIT	**CTO SUBMIT	3	BYPASS PNR ⁵
AUTH ¹	CTO BOOKED	**CTO BOOKED	4	BYPASS PNR ⁵
AUTH	REVIEWED	Shelly Smith ²	10	
AUTH	REVIEWED	Sidney Carson ²	10 ³	
AUTH	APPROVED	Chris West	20 ³	
AUTH	APPROVED ⁴	Caroline Cruz	20	
LVCH	REVIEWED	Shelly Smith	10	
LVCH	REVIEWED	Sidney Carson	10	
LVCH	APPROVED	Chris West	20	
LVCH	APPROVED ⁴	Caroline Cruz	20	
VCH	APPROVED	Chris West	20	
VCH	APPROVED ⁴	Caroline Cruz	20	
<p>Sample Routing List:</p> <p><i>*A complete routing list contains all three document types; Auths, Vchs, and Lvchs.</i></p> <p>Note¹: Include TMC steps before any other steps. TMC steps are for Authorizations/Amended Authorizations.</p> <p>Note²: Includes back up routing officials at each level.</p> <p>Note³: Level numbers have gaps.</p> <p>Note⁴: APPROVED is highest level for each document type</p> <p>Note⁵: For TMC steps, only use conditional routing BYPASS PNR. Routing rows without a Process Name are not conditional routing.</p>				

Chapter 4: Working with DTS Routing Lists

You access DTS at <https://dtsproweb.defensetravel.osd.mil/dts-app/pubsite/all/view/>. Once logged into the system, you can perform administrative actions. The **DTS DTA Maintenance Tool** allows you to manage and maintain your organization's resources. You use the **Routing List's** module to locate, create, update, copy, and delete routing lists. This document discusses all these options.

From the **DTS Dashboard**, mouse over the **Administration** menu (Figure 5-2), then select **DTA Maintenance Tool**. **Note:** You can also use the quick tile to access **DTA Maintenance Tool**.

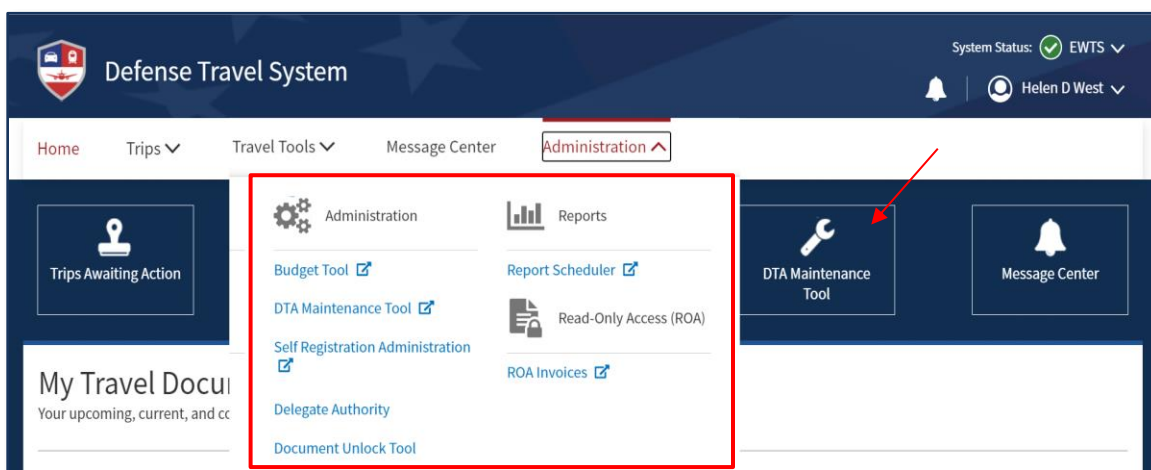


Figure 5-2: DTS Dashboard – Administration Menu

The **DTA Maintenance Tool Home** page (Figure 5-3) opens. From the **DTA Tools Bar** (which appears on every screen in the **DTA Maintenance Tool**), you can access all the **DTA Maintenance Tool** modules in which you have permissions, without returning to the **DTS Dashboard**.

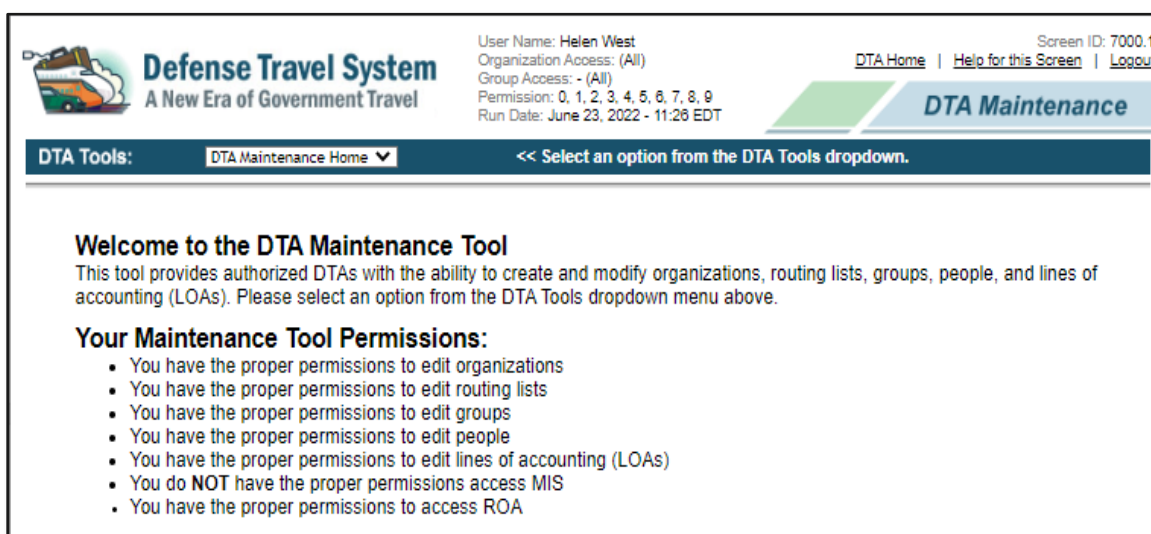


Figure 5-3: DTA Maintenance Tool Home Page

Select **Routing Lists** from the **DTA Tools** drop-down list. The **Search Routing Lists(s)** screen (Figure 5-4) opens and the **DTA Tools Bar** updates providing options to allow:

- Search for a routing list
- Create a routing list
- Create a report that shows you the routing lists for an organization owns
- Create a report that shows you Routing Officials who delegated their **Signature Authority** and to whom

Below is a description of each of these options.

4.1 Search for a Routing List

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

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List | View Delegated Authorities List

Search Routing List(s)

For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Routing List Name:

Organization Name: ☐ --Include Sub-Organizations

Default Routing Lists Only: ☐

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

To search for a routing list:

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

DTA Tools: Routing Lists

Search Routing List(s)

Create Routing List(s)

View Routing List List

View Delegated Authorities List

Routing List(s) (Search Results)

Routing List Name:

Default Routing Lists Only: No

Organization Name: DTMOCS

Include Sub-Organizations: Yes

Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCS	CSD	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCS	EWTS TRAINING	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCS	Routine - 1	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCS	Training	Yes
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCS460FM	MM	Yes
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSOPS	CSDOPS	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSOPS	DEFAULT	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSOPS	TESTING	No
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSOPS	TRAVEL	Yes
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSOPSTEST	TEST	Yes
<input type="checkbox"/>	<div>UpdateCopyDelete</div>	DTMOCSDTRAINING	RL1	Yes

Select AllClear All

Globally Update Selected Routing Lists (on this page)

Add Routing Element

Remove Routing Element

Replace Signature Authority

1 - 11 of 11

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

From this screen, you can copy, update, delete, or use the **Global** options. Below covers all of these different options.

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

Table 5-2

SAMPLE ROUTING LIST	
Field or Object	Description
Text items at the top of the screen (e.g., Default Routing Lists Only)	Identify the search criteria you entered on the Search Routing List(s) screen. Displays red text if you used the field in your search, or the item is blank if you did not.
Select to Globally Update	When you need to make the same change to multiple routing lists, check the box next to each organization you need to change. These boxes work with the Globally Update buttons (also listed in gray on this table) at the bottom of the screen.
Individually Edit	Column containing buttons that let you Update, Copy, or Delete a single routing list.
Organization Name	Column that displays the organizations that own the displayed routing lists.

Routing List Name	Column that shows the routing lists that match your search criteria.
Default Routing List	Column that identifies whether the routing list is an organization’s default routing list.
Globally Update Selected Routing Lists (on this page)	Row containing three buttons. When you check at least one box in the Select to Globally Update column (also listed in gray on this table), these buttons let you Add, Remove, or Replace a routing element in all the checked routing lists at the same time.

4.2 Update a Single Routing List

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

4.2.1 Add a Routing Element (Typical Routing List Setup)

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

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

Update Routing List

Routing List Name: **DEFAULT**

Default Routing List: **Yes**

Add Routing Element

Populate CTO Stamps

Edit

Document Type

Document Status

Signature Name

Level

Process Name

No routing elements are currently defined for the routing list

Save Changes

Cancel

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

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

Update Routing List

Routing List Name: **DEFAULT**

Default Routing List: **Yes**

Add Routing Element

Edit

Document Type

Document Status

Signature Name

Level

Process Name

Authorization

CTO SUBMIT

**CTO SUBMIT

2

BYPASS PNR

Authorization

CTO BOOKED

**CTO BOOKED

3

BYPASS PNR

Save Changes

Cancel

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

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

Figure 5-8: Add Routing Elements Screen

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

Figure 5-9: Search People Screen

7. Enter the **Organization Name** to search for the RO. If you're unsure which organization the person belongs to, then keep the field displaying your main organization access and select **Include Sub-Organizations** to search your entire hierarchy.
8. Enter the person's **Social Security number (SSN)** or all or part of their last name. **Note:** Entering the first name along with the last name is an option. Searching by only the first name is not permissible.
9. Select **Search**. The **Search People Results** screen (Figure 5-10) opens. It displays key information about everyone who met your search criteria.

Search People Results			
Organization Name:		Last Name: w	
Include Sub-Organizations: true		First Name:	
Select Person	Name	SSN	Organization
Select	West, Chris A	XXXXX9741	DTMOCSD
Select	West, Eric T	XXXXX9743	DTMOCSD
Select	West, Helen D	XXXXX9740	DTMOCSD
Select	West, Molly T	XXXXX9742	DTMOCSD
1 - 4 of 4			
Back to People Search		Close Window	

Figure 5-10: Search People Result Screen

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

Add Routing Element		* Required	
Routing List Name: DEFAULT			
Organization Name: DTMOCSDOPS			
Document Type: *	<input type="text" value="Authorization"/>		
Document Status: *	<input type="text" value="APPROVED"/>		
Signature Name: *	<input type="text" value="Chris A West"/>	Search	Xorg Search
Level: *	<input type="text"/>		
Process Name:	<input type="text"/>		
Add Routing Element		Cancel	

Figure 5-11: Add Routing Element Screen

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

Update Routing List					
Routing List Name: DEFAULT			Default Routing List: Yes		Add Routing Element
Organization Name: DTMOCS DOPS					
Edit	Document Type	Document Status	Signature Name	Level	Process Name
	Authorization	CTO SUBMIT	**CTO SUBMIT	2	BYPASS PNR
	Authorization	CTO BOOKED	**CTO BOOKED	3	BYPASS PNR
Update Remove	Authorization	REVIEWED	Molly T West	15	
Update Remove	Authorization	REVIEWED	Eric T West	15	
Update Remove	Authorization	APPROVED	Helen D West	25	
Update Remove	Authorization	APPROVED	Chris A West	25	
Update Remove	Local Voucher	APPROVED	Helen D West	25	
Update Remove	Local Voucher	APPROVED	Chris A West	25	
Update Remove	Voucher	APPROVED	Helen D West	25	
Update Remove	Voucher	APPROVED	Chris A West	25	
			Save Changes	Cancel	

Figure 5-12: Update Routing List Screen

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

Routing List(s) (Search Results)					
Routing List Name:			Organization Name: DTMOCS D		
Default Routing Lists Only: No			Include Sub-Organizations: Yes		
Select to Globally Update	Individually Edit	Organization Name	Routing List Name	Default Routing List	
<input type="checkbox"/>	Update Copy Delete	DTMOCS D	CSD	No	
<input type="checkbox"/>	Update Copy Delete	DTMOCS D	EWTS TRAINING	No	
<input type="checkbox"/>	Update Copy Delete	DTMOCS D	Training	Yes	
<input type="checkbox"/>	Update Copy Delete	DTMOCS D460FM	MM	Yes	
<input type="checkbox"/>	Update Copy Delete	DTMOCS DOPS	DEFAULT	Yes	
<input type="checkbox"/>	Update Copy Delete	DTMOCS DTRAINING	RL1	Yes	
Select All Clear All					
Globally Update Selected Routing Lists (on this page)					
		Add Routing Element	Remove Routing Element	Replace Signature Authority	
1 - 6 of 6					

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

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

4.2.1.1 Add a Routing Official From Outside the Organization

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

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

Search People

SSN:

SearchClose Window

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

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

Search People Results

SSN: 999971590

Select Person	Name	SSN	Organization
Select	DODD, TOM H	999971590	DTMOTCP180017

1 - 1 of 1

Back to People SearchClose Window

Figure 5-15: Search People Results Screen

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

4.2.1.2 Add a Conditional Routing Official (General)

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

Note 1: DTS recognizes Non-Foreign Territories as part of the United States (U.S.) as follows: States of Alaska and Hawaii, the Commonwealths of Puerto Rico, Guam, and the Northern Marianna Islands and the territories and possessions of the United States (excluding the Trust Territories of the Pacific Islands).

Note 2: When a user selects a Foreign (OCONUS and is NOT one of the Non-Foreign Territories) location, DTS provides the following:

- Pre-Audit Advisory Message: Foreign Travel
- Advisory Description: Foreign travel doc. See Defense Travel Administrator (DTA) personnel for special processing requirements.

Table 5-3

PROCESS NAME OPTIONS	
Process Name	Check for Condition
BYPASS PNR	Checks for reservations in an authorization. If no reservations exist, the document skips TMC processing.
FOREIGN TRAVEL	Checks for travel starting from a CONUS location going to an OCONUS location. Any Itinerary Location that is not the Start or End Location of OCONUS, and is NOT one of the Non-Foreign Territories.
OCONUS/CONUS	Checks for travel starting from an OCONUS location going to a CONUS location. The Itinerary Location is CONUS, a Non-Foreign Territory, Hawaii, or Alaska.
OCONUS/OCONUS	Checks for travel from an OCONUS location to a different OCONUS location. Any Itinerary Location is OCONUS, and is NOT one of the Non-Foreign Territories and NOT the same country as the Start Location.
PREMIUM CLASS FARE	Checks for non-economy/coach class fares such as business or first class.
TRAVEL MODE ROUTE*	Checks the selected transportation mode.
TRAVELER NUMBER	Checks the number of travelers in a group authorization. If the number is 10 or more, the document routes to a Transportation Officer (TO).
LEAVE REQUESTED	Checks for an annual leave or non-duty status. This option is available for vouchers only.
*Note: This process names include unique variations in the set-up process, covered elsewhere in this chapter. Travel Mode is in section 4.2.1.4.	

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

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

Add Routing Element * Required

Routing List Name: **DEFAULT**
Organization Name: **DTMOCSDOPS**

Document Type: * **Authorization**
Document Status: * **REVIEWED1**
Signature Name: * **Molly T West**
Search Xorg Search

Level: * **20**
Process Name: **[Dropdown]**

Save Cancel

BYPASS PNR
FOREIGN TRAVEL
OCONUS/CONUS
OCONUS/OCONUS
PREMIUM CLASS FARE
TRAVEL MODE ROUTE
TRAVELER NUMBER

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

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

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

Update Routing List

Routing List Name: **DEFAULT** Default Routing List: **Yes** Add Routing Element

Organization Name: **DTMOCSDOPS**

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

Save Changes Cancel

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

4.2.1.3 Add a Conditional Routing Official for Travel Mode

Your local business rules may require a specific RO to review a travel document if the traveler selected a particular transportation mode. For instance, if traveler selected a transportation mode reimbursable by a

Centrally Billed Account (CBA), you may want someone familiar with CBAs to review the document. To handle those situations, DTS allows you to select conditional routing options based on the “travel mode.”

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

Add Routing Element * Required

Routing List Name: **DEFAULT**
 Organization Name: **DTMOCSDOPS**

Document Type: * **Authorization** ▼
 Document Status: * **REVIEWED2** ▼
 Signature Name: * **Molly T West** [Search](#) [Xorg Search](#)
 Level: * **25**
 Process Name: **TRAVEL MODE ROUTE** ▼

Travel Mode(s): *

<input type="checkbox"/> CA	<input type="checkbox"/> CB	<input type="checkbox"/> CB-C	<input type="checkbox"/> CF
<input type="checkbox"/> CF-C	<input type="checkbox"/> CF-I	<input type="checkbox"/> CP	<input type="checkbox"/> CP-C
<input type="checkbox"/> CR	<input type="checkbox"/> CR-C	<input type="checkbox"/> CV	<input type="checkbox"/> GA
<input type="checkbox"/> GB	<input type="checkbox"/> GP	<input type="checkbox"/> GV	<input type="checkbox"/> PA
<input type="checkbox"/> PM	<input type="checkbox"/> PP	<input type="checkbox"/> PV	<input type="checkbox"/> TB
<input type="checkbox"/> TP	<input type="checkbox"/> TR	<input type="checkbox"/> TV	

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

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

Table 5-4 explains the Travel Mode.

Table 5-4

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

GA	Government Auto
GB	Government Bus
GP	Government Plane
GV	Government Vessel
PA	Private Auto TDY/TAD
PM	Private Motorcycle TDY/TAD
PP	Private Plane
PV	Private Vessel
TB	Prepaid Bus
TP	Prepaid Plane
TR	Prepaid Rail
TV	Prepaid Vessel

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

4.2.2 Update a Routing Element

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

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

Update Routing List

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

Organization Name: **DTMOCSDOPS**

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

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

Figure 5-19: Update Routing List Screen

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

Figure 5-20: Update Routing Element Screen

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

4.2.3 Remove a Routing Element

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

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

4.3 Copy a Routing List

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

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

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

Copy Routing List

• Required

For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Routing List Name: DEFAULT

Organization Name: DTMOCSODPS

New Routing List Name: *

DEFAULT

Organization Name: *

DTMOCSODPS

Make this the default routing list?:

☐ Yes

☒ No

[Note: Changing the default routing list will only affect newly created travelers and those re-assigned to the organization. It has no affect on the default routing list of travelers who have already been created.]

Copy Routing List

Cancel

Figure 5-21: Copy List Screen

2. An organization cannot have two routing lists with the same name, so you must enter a **New Routing List Name**, a new **Organization Name**, or both.

3. Select **Yes** to make the new routing list the default routing list for the destination organization. Leave **No** selected, if you don't want to establish a new default routing list.

4. Select **Copy Routing List**. The **Routing List(s) Search Results** screen (Figure 5-5) opens to display the new routing list.

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

4.4 Delete a Routing List

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

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

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

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

Delete Routing List

Routing List Name: TEAM1

Organization Name: DTMOCSODPS

Default Routing List: false

Delete Routing List

Cancel

Figure 5-22: Delete Routing List Screen

2. Select **Delete Routing List**. The **Routing List(s) Search Results** screen (Figure 5-5) opens. The deleted routing list is not on the list.

Note: If you cannot remove the routing list, a **Domain Error** message (Figure 5-23) displays to explain the situation. In our example, the routing list **Training** is a **Default Routing List**, so it can't be deleted from the organization. You would need to designate a different routing list as a default, then you could remove the **Training** routing list.

DTA Tools: Routing Lists | Search Routing List(s) | Create Routing List(s) | View Routing List | View Delegated Authorities List

Domain Error

The following domain validation errors have occurred:

- The routing list cannot be deleted since it is currently designated as the default routing list for its associated organization. Please select a different routing list as the default for the organization if you wish to delete this routing list.

Delete Routing List

Routing List Name:	Training
Organization Name:	DTMOCS
Default Routing List:	true

[Delete Routing List](#) [Cancel](#)

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

4.5 Create a Routing List

To create a new routing list from scratch:

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

Create Routing List * Required

For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Routing List Name:

Organization Name:

Make this the default routing list?: ☐ Yes ☒ No

[Note: Changing the default routing list will only affect newly created travelers and those re-assigned to the organization. It has no effect on the default routing list of travelers who have already been created.]

[Save Routing List](#) [Cancel](#)

Figure 5-24: Create Routing List Screen

2. Enter the **Routing List Name** (up to 16 alpha/numeric characters). The name must be unique, as you can't enter a duplicate routing list name in the same organization. **Note:** Recommend not using special characters such as (*!#-) when naming a routing list.

3. Enter the **Organization Name**. Your main organization's name appears by default, but you can change it, if another organization will own this routing list.
4. Select **Yes** or **No** indicating if the new routing list will be the organization's default routing list.
5. Select **Save Routing List**. The **Routing List(s) (Search Results)** screen opens to display this routing list only.

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

4.6 Update Multiple Routing Lists

In DTS, *global* maintenance is the ability to adjust routing elements on multiple routing lists at the same time. To use the global feature, you must first search for all the routing lists you want to modify. Based upon the return results, you may **Add** or **Remove Routing Element** and **Replace Signature Authority** on existing routing lists.

Note: Using standardized routing stamps and steps (e.g., Reviewed 10, Approved 20) makes changing routing lists elements easier.

Routing List(s) (Search Results)						
Routing List Name:			Organization Name: DTMOCSD			
Default Routing Lists Only: No			Include Sub-Organizations: Yes			
Select to Globally Update	Individually Edit			Organization Name	Routing List Name	Default Routing List
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	CSD	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	EWTS TRAINING	No
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD	Training	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSD460FM	MM	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDOPS	DEFAULT	Yes
<input type="checkbox"/>	Update	Copy	Delete	DTMOCSDTRAINING	RL1	Yes
Select All		Clear All				
Globally Update Selected Routing Lists (on this page)						
Add Routing Element		Remove Routing Element		Replace Signature Authority		

1 - 6 of 6

Figure 5-25: Routing Lists(s) Search Results) Screen

4.6.1 Add a Routing Element

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

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

Globally Add Routing Element

Required

Document Type: *

Voucher

Document Status: *

REVIEWED1

Signature Name: *

Molly T West

Search

Xorg Search

Level: *

15

Process Name:

FOREIGN TRAVEL

† Read-only field, use Search button

Routing List(s) To Be Updated:

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

Globally Add Routing Element

Cancel

Figure 5-26: Globally Add Routing Element Screen

- Complete the **Document Type**, **Document Status**, **Signature Name**, **Level**, and (if needed) **Process Name** fields. These fields all function exactly as described in section 4.2.1 above. **Note:** Figure 5-26 shows the **Globally Add Routing Element** fields selected to add Molly West as a conditional reviewer for OCONUS vouchers. She will appear at level 15 on six routing lists.
- Select **Globally Add Routing Element**. The **Globally Add Routing Element Summary** screen (Figure 5-27) opens. It indicates the success or failure when updating each routing list. There are many reasons an update might fail, for instance, trying to add a new **Document Status** at a level occupied by a different status. (e.g., Adding **REVIEWED** at level 20 when **AUTHORIZED** is already at level 20).

Organization Name	Routing List Name	Default Routing List	Update Result
DTMOCS	CSD	No	Successful
DTMOCS	EWTS TRAINING	No	Successful
DTMOCS	Training	Yes	Successful
DTMOCS460FM	MM	Yes	Successful
DTMOCSOPS	DEFAULT	Yes	Successful
DTMOCSTRAINING	RL1	Yes	Successful

OK

Figure 5-27: Globally Add Routing Element Summary Screen

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

4.6.2 Remove a Routing Element

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

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

Globally Remove Routing Element

Document Type: ¹
Document Status: ²
Signature Name: ²

Level: ¹

¹ This is not a required field, but if inputted, at least one other field must be inputted
² This is not a required field, but may be the only field with an input
[†] Read-only field, use Search button

Routing List(s) To Be Updated:

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

Figure 5-28: Globally Remove Routing Element Screen

3. Complete the necessary **Document Type**, **Document Status**, **Signature Name**, and **Level** fields to update the routing. Once you select certain fields, requires you to the select others. These requirements appear on the screen. These fields all function exactly as described in section 4.2.1 above.

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

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

4.6.3 Replace a Routing Element

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

1. Check the **Select to Globally Update** box next to all of the routing lists you want to change.

2. Select **Replace Signature Authority**. The **Globally Replace Signature Authority** screen (Figure 5-29) opens.

Globally Replace Signature Authority
* Required

Old Signature Name:*

Search
Xorg Search

New Signature Name:*

Search
Xorg Search

↑ Read-only field, use Search button

Routing List(s) To Be Updated:

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

Globally Replace Signature Authority
Cancel

Figure 5-29: Globally Replace Signature Authority Screen

3. Complete the **Old Signature Name** and **New Signature Name** fields by selecting either the **Search** or **Xorg Search** function as described in section 4.2 above.
 - For the **Old Signature Name**, select the name of the Routing Official you are *replacing*.
 - For the **New Signature Name**, select the name of the *new* Routing Official.
4. Select **Globally Replace Signature Authority**. The **Globally Replace Signature Authority Summary** screen opens. It indicates the success or failure when updating each routing list. There are many reasons an update might fail, for instance, trying to replace a Routing Official that was not on a routing list.
5. Select **OK**. The **Routing List(s) (Search Results)** screen displays.

4.7 Create a Routing List for a Self-AO

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

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

4.7.1 Designate a Traveler as a Self-AO

Before you can designate someone as a *Self-AO*, check your local business rules for any required training. In DTS, the *Self-AO's* profile must reflect the specialized role. To do so, set the *Self-AO Approval* radio button to **Yes** and

make sure the permission levels reflect 0 and 2. **Note:** Follow your local business rules for granting permission level 1 (view budget) to AOs.

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

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

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

A *Self-AO* must be on the routing list for authorizations only. Then, either designate someone else to serve as an AO for vouchers and local vouchers or instruct the *Self-AO* to use a different routing list, since the *Self-AO* cannot approve their own vouchers or local vouchers.

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

Update Routing List

Routing List Name: **DEFAULT**
Default Routing List: **Yes**
Add Routing Element

Organization Name: **DTMOCSDOPS**

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

Save Changes
Cancel

Figure 5-30: Update Routing List Screen

Chapter 5: Routing List Module Reports

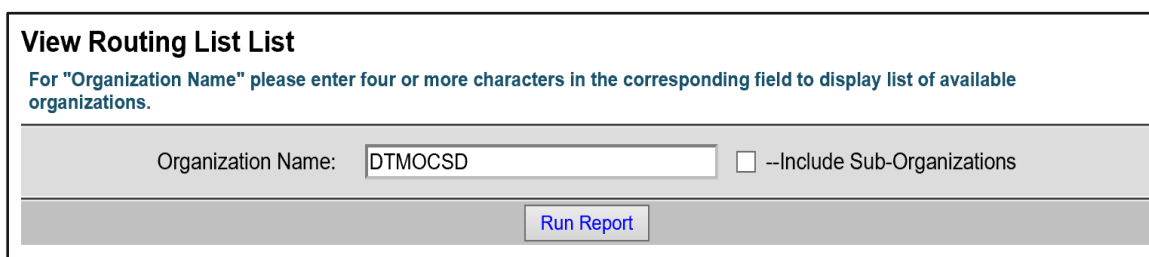
There are two reports or view lists you can run within Routing Lists; **Routing List** and **View Delegation List**. See sections 5.1 and 5.2 for details.

5.1 View Routing List List

The **Routing List List*** shows you key information about the routing lists owned by organizations. **Note:** *Yes, that's the report's name. It's essentially a "list of routing lists."

To run a **Routing List Report**:

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



View Routing List List

For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Organization Name: ☐ --Include Sub-Organizations

[Run Report](#)

Figure 5-31: View Routing List List Screen

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

5.2 View Delegated List

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

To run a **Delegated Authorities Report**:

1. From any screen in the **Routing Lists** module, select **View Delegated Authorities List** in the **DTA Tools Bar**. The **View Delegated Authorities List** screen (Figure 4-12) opens.

View Delegated Authorities List

For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Organization Name: ☐ --Include Sub-Organizations

[Run Report](#)

Figure 5-32: View Delegated Authorities List Screen

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

Chapter 6: The DTA Manual: Contents & Links

DTA MANUAL CHAPTER: TOPIC	URL
Chapter 1: DTS Overview	https://media.defense.gov/2022/May/11/2002994773/-1/-1/0/DTA_1.PDF
Chapter 2: DTS Access	https://media.defense.gov/2022/May/11/2002994797/-1/-1/0/DTA_2.PDF
Chapter 3: DTS Site Setup	https://media.defense.gov/2022/May/11/2002994799/-1/-1/0/DTA_3.PDF
Chapter 4: Organizations	https://media.defense.gov/2022/May/11/2002994824/-1/-1/0/DTA_4.PDF
Chapter 5: Routing Lists	https://media.defense.gov/2022/May/11/2002994853/-1/-1/0/DTA_5.PDF
Chapter 6: Groups	https://media.defense.gov/2022/May/11/2002994838/-1/-1/0/DTA_6.PDF
Chapter 7: People	https://media.defense.gov/2022/May/11/2002994837/-1/-1/0/DTA_7.PDF
Chapter 8: LOAs	https://media.defense.gov/2022/May/11/2002994836/-1/-1/0/DTA_8.PDF
Chapter 9: Budgets	https://media.defense.gov/2022/May/11/2002994835/-1/-1/0/DTA_9.PDF
Chapter 10: Reports	https://media.defense.gov/2022/May/11/2002994832/-1/-1/0/DTA_10.PDF
Chapter 11: MIS Administration	https://media.defense.gov/2022/May/11/2002994834/-1/-1/0/DTA_11.PDF
Chapter 12: ROA Administration	https://media.defense.gov/2022/May/11/2002994833/-1/-1/0/DTA_12.PDF

DTA MANUAL APPENDIX: TOPIC	URL
Appendix A: Self-Registration	https://media.defense.gov/2021/Nov/15/2002893136/-1/-1/0/DTA_APP_A.PDF

Appendix B: Acronyms	https://media.defense.gov/2021/Nov/15/2002893141/-1/-1/0/DTA_APP_B.PDF
Appendix C: Definitions	https://media.defense.gov/2021/Nov/15/2002893143/-1/-1/0/DTA_APP_C.PDF
Appendix E: Emails	https://media.defense.gov/2021/Nov/15/2002893222/-1/-1/0/DTA_APP_E.PDF
Appendix F: Import / Export Module	https://media.defense.gov/2021/Nov/15/2002893234/-1/-1/0/DTA_APP_F.PDF
Appendix G: Error Codes	https://media.defense.gov/2021/Nov/15/2002893232/-1/-1/0/DTA_APP_G.PDF
Appendix J: Help Process	https://media.defense.gov/2021/Nov/15/2002893231/-1/-1/0/DTA_APP_J.PDF
Appendix K: DTS Tables	https://media.defense.gov/2021/Nov/15/2002893230/-1/-1/0/DTA_APP_K.PDF
Appendix L: Reorganizations	https://media.defense.gov/2021/Nov/15/2002893229/-1/-1/0/DTA_APP_L.PDF
Appendix M: Ranks and Grades	https://media.defense.gov/2021/Nov/15/2002893228/-1/-1/0/DTA_APP_M.PDF
Appendix N: Country Codes	https://media.defense.gov/2021/Nov/15/2002893227/-1/-1/0/DTA_APP_N.PDF
Appendix Q: Org Naming Sequence	https://media.defense.gov/2021/Nov/15/2002893226/-1/-1/0/DTA_APP_Q.PDF
Appendix R: LOA Formats	https://media.defense.gov/2021/Nov/15/2002893225/-1/-1/0/DTA_APP_R.PDF