



Defense Travel Management Office



Reorganization in DTS

Connect 2011 Seminar

April 2011

For Official Use Only



Agenda

- Discuss the actions outlined in Appendix L of the DTA Manual to complete a reorganization to include:
 - Preparation
 - Action steps
 - Validation





Why Perform a Reorganization?

- Parent command changes
- Sub-organization migrates to another command
- Command changes name or structure
- Other reasons:
 - Addition of sub-orgs
 - Reorganization of sub-orgs
 - Constraints on naming conventions
 - Merging of organizations





Administrative Process

- Preparation is a key element in reorganization
- Consult with upper echelon
 - Conduct meetings and discuss naming the new org
 - Sketch out new and old organization on paper
 - Centrally Billed Accounts (CBA) need to be linked to new organization
 - CBA Load Request
(http://www.defensetravel.dod.mil/Docs/CBA_Account_Load_Worksheet.xls)
 - Designate roles and responsibilities





Review Steps

- After following guidance in Appendix L, contact your Service office or create TAC help ticket if questions remain
- TAC support may include:
 - Advice
 - Assistance
 - Top level access to see all orgs
- Prepare your command
 - Announce new org name
 - Run “View Person List” from DTA Maintenance Tool for comparison

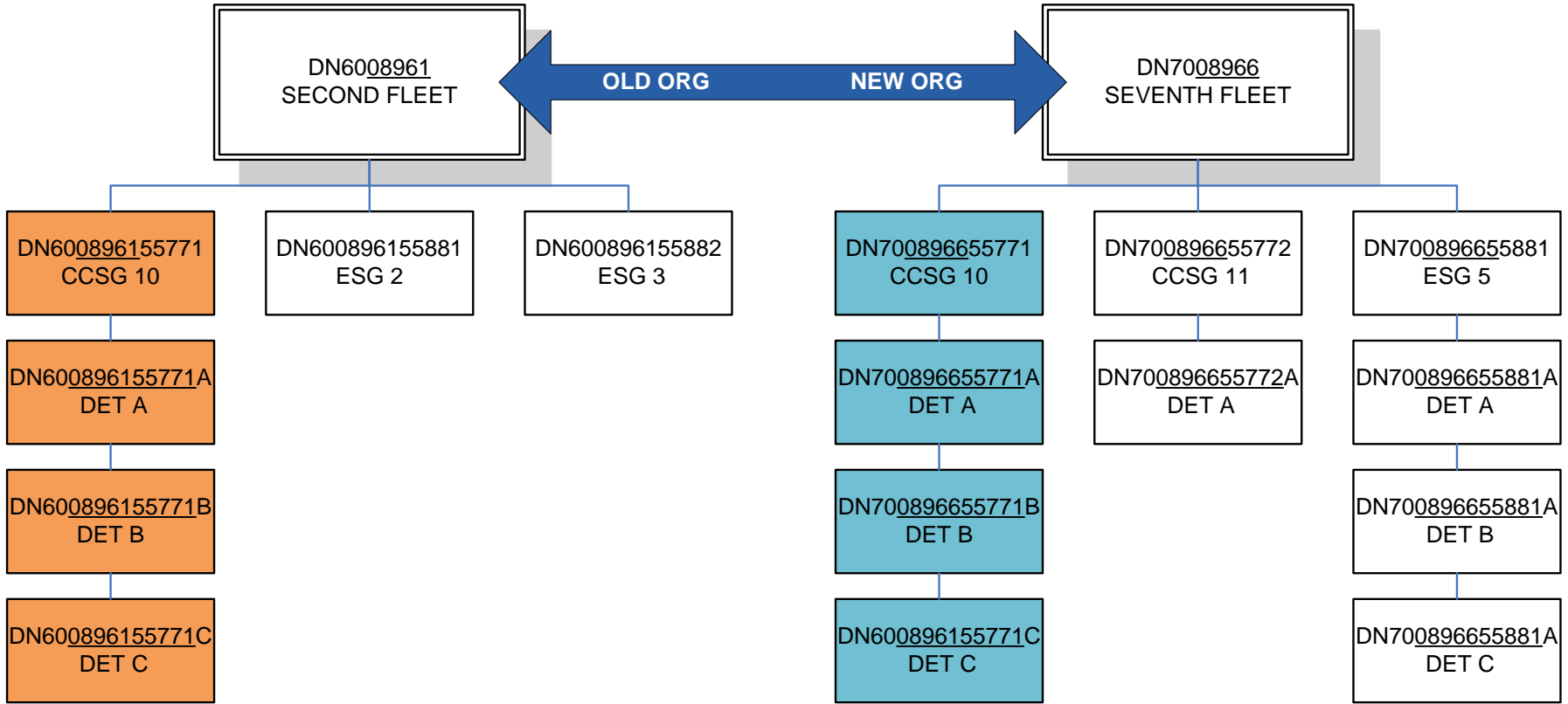


*** It is recommended to avoid new travel authorizations until after reorganization*





Visualize Old/New Organization Structure





Method - Copy Organization

- If you chose the “Copy” option, you may select copy Routing Lists and Groups from existing organization. Global Group Membership Rules (GGMRs) may also be copied
- If selected, note the following:
 - All routing lists owned by the current organization will copy to new organization (includes all routing list details), including original names
 - All groups and GGMRs from the current organization will be copied, including original names
 - If “Copy Groups” is selected, all personnel will be reassigned from old to new organization
 - Individual group membership is not copied





Method - Copy Organization (continued)

Organizations Search Organization(s) | Create Organization(s) | View CBA List | View Organization List

Organization(s) (Search Results)

Organization Name: **HTSPAWAR**
 Include Sub-Organizations: **Yes**

Edit				Organization Code	GDS	PCC	Ticket PCC	Company Code
Copy	Update	Delete	Reassign Personnel	HTSPAWAR	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN02	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN03	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN04	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN05	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN06	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN07	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN08	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN09	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN10	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN11	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN12	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN13	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN14	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN15	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN16	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN18	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR3MAIN25	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN01	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN01SUB1	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN01SUB2	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN02	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN02SUB1	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	HTSPAWAR6MAIN02SUB2	AA	D1WA	D1WA	-D1WA-PROFILE





Method - Copy Organization (continued)

Organization Hierarchy

Site Name: * DTMO
 (Geographic Location; City, Post, Camp or Station where the DTS Org is physically located)

Organization Code: *
 (DTS hierarchical naming sequence; enter up to 20 characters)

Organization Description: *
 (Unit name (i.e., 1/21 Infantry Battalion, 225th Fighter Wing, Operations Group, etc.))

DTA ID : DTMO TRNG

Commercial Travel Office (CTO) Information

GDS: AA
 PCC: D1WA
 Ticket PCC: D1WA
 Company Code: -D1WA-PROFILE

Organization Information

Service / Agency by which the traveler is employed: DHRA
 Office Address Line 1: 4601 N. Fairfax Drive
 Office Address Line 2:
 Office City: Arlington
 Office State / Country: VA
 Office Zip / Postal Code: 22203
 Mail Code:
 Office Phone Number: 111-111-1111
 Office Fax Number:
 Number of Miles to Closest Airport:
 Time Zone: 6
 Organization Email Address: email@email.com
 Number of Work Hours / Day: 8
 Present Duty Station Name:
 Emergency Contact Name: Duty Clerk
 Emergency Contact Phone Number: 111-111-1111
 Unit ID (UIC/RUC/PASSCODE): 12345
 Email Notification: N
 Set threshold to require approval for CTO Ticketed Amendment with cost increase
 N = must approve any increase (\$0.00 threshold)
 Y = approve any increase greater than 5% (\$250.00 max)
 Y

Copy Options: Copy ALL Routing List and Routing List Details from DTMOCS
 Copy ALL Groups and Global Group Membership Rules from DTMOCS
 *If Copy Groups is selected, all personnel will be reassigned from DTMOCS



Method – Create Option

- Following steps are required for Create Option
 - Create new group(s)
 - Create new global group membership
- DTA must reassign personnel to new organization(s) (up to five) in the organization section of Maintenance Tool





Lines of Accounting

- If applicable, DTA can Mass Copy existing LOA(s) to new organization
- If Default LOA feature is used for your travelers, DTA can make a mass update to default LOA in LOA section of Maintenance Tool
- Update LOA elements if changes apply





Mass Copy LOA

Defense Travel System
A New Era of Government Travel

User Name: Helen Norfolk-A
Organization Access: (All)
Group Access: - (All)
Permission: 0, 1, 2, 3, 4, 5, 6, 7, 8
Run Date: March 18, 2011 - 11:39 EDT

Screen ID: 7700.1
[DTA Home](#) | [Help for this Screen](#) | [Logout](#)

DTA Tools: Lines of Accounting | [Search LOA\(s\)](#) | [Create LOA\(s\)](#) | [Update Default LOA\(s\)](#) | [Mass Update](#) | **Mass Copy** | [View LOA\(s\) List](#)

DTA Maintenance

Search Lines of Accounting

Label: (FY + LOA Name)
Format Map:
Organization Name: --Include Sub-Organizations
Unbudgeted LOA(s) Only:

Remember to Mass Copy each Fiscal Year separately !



Update Budget

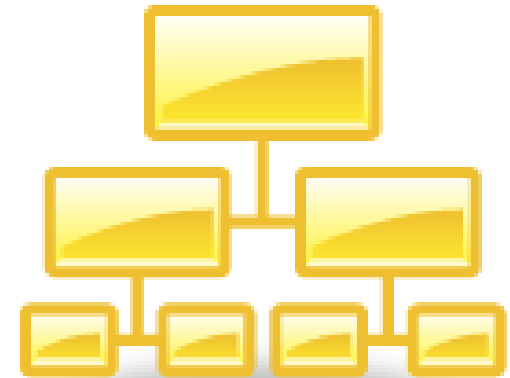
- When a new LOA is created or Mass Copied a matching Budget Shell must be created
 - Automatically by selecting 'Create Budget Shell'
 - Manually created after the copy
- Budgets may be quarterly or annual – add target amounts after creation





Update Groups/Global Group Membership Rules

- Create new groups if necessary
- Review and update GGMRs
- DTA Manual Chapter 6 refers





Update Organization Data

- If Copy option used, new organization may need to be updated with correct address and office information
 - Update can be cascaded down to personnel assigned to new organization and to subordinate organizations, if applicable
- If Groups were copied when creating new organization, all personnel with organization access to original organization will automatically have same permissions to new organization, including:
 - Org and Group Access
 - Permission Levels
 - Default Routing List





Update Options

Commercial Travel Office (CTO) Information

GDS: * AA - Sabre (Global Distributed System - reservation system)

PCC: * D1WA (Pseudo City Code)

Ticket PCC: * D1WA

Company Code: * -D1WA-PROFILE

Organization Information

Service / Agency by which the traveler is employed: * United States Navy

Office Address Line 1: * 911 EMERGENCY BLVD

Office Address Line 2: *

Office City: * SAN DIEGO

Office State / Country: * CA [Lookup](#)

Office Zip / Postal Code: * 92126

Mail Code: *

Office Phone Number: * 000-000-1000

Office Fax Number: *

Number of Miles to Closest Airport: *

Time Zone: * GMT-8:00 (Pacific Standard Time)

Number of Work Hours / Day: 8

Present Duty Station Name: *

Emergency Contact Name: * CDO

Emergency Contact Phone Number: * 000-000-1000

Unit ID (UIC/RUC/PASSCODE): * 12346

Set threshold to require approval for CTO Ticketed Amendment with c
 N = must approve any increase (\$0.00 threshold)
 Y = approve any increase greater than 5% (\$250.00 max)

* N

Update Options: Save these changes to ALL Personnel under HTSPAWAR
 Save these changes to ALL Sub Organizations of HTSPAWAR

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

Check these options as desired






Resource – DTS Organization Change Profile Information Chart

- Information paper available that describes effect on permissions when profiles are moved, re-assigned or copied
- Access through Training Resource Look Up Tool or by navigating to:

http://www.defensetravel.dod.mil/Docs/DTS_Org_Change_Profile_Info_Chart.pdf


 DEFENSE TRAVEL
 MANAGEMENT OFFICE

Information Paper:
DTS Organization Change Profile Information Chart

Profile Feature	Copy One Organization to a New Name	Reassign Personnel	Profile— Organization Change
Permissions	Remain the same	Remain the same	Remain the same
Org Access to Org of Assignment	Changed to new Org Access	Blank, must be reselected as appropriate	Does NOT change remains old org access
Org Access to other than Org of assignment (higher or lower)	Remain the same	Blank, must be reselected, as appropriate	Does NOT change, remains old org access
Group Access to Group at Org of assignment	Changed to new Org/ same Group name. See Note 1	Blank must be reselected as appropriate	Does NOT change, remains old group access
Group Access to a Group	Remain the same	Blank, must be reselected	Does NOT change



Update Profile Data

- After completing reorganization, View Person List should be run
- All administrators will need to compare their permission levels and group access reassigned to them within their profile
- Travelers will be automatically assigned permission level 0





Old Organization

- After new organization structure is completely set up and reviewed, previous structure should be restricted from use
- If former organization will remain in use by some personnel, create duplicate non-traveler profiles
- Why would the old structure need to remain?
 - Access to previous budgets
 - Ability to run reports





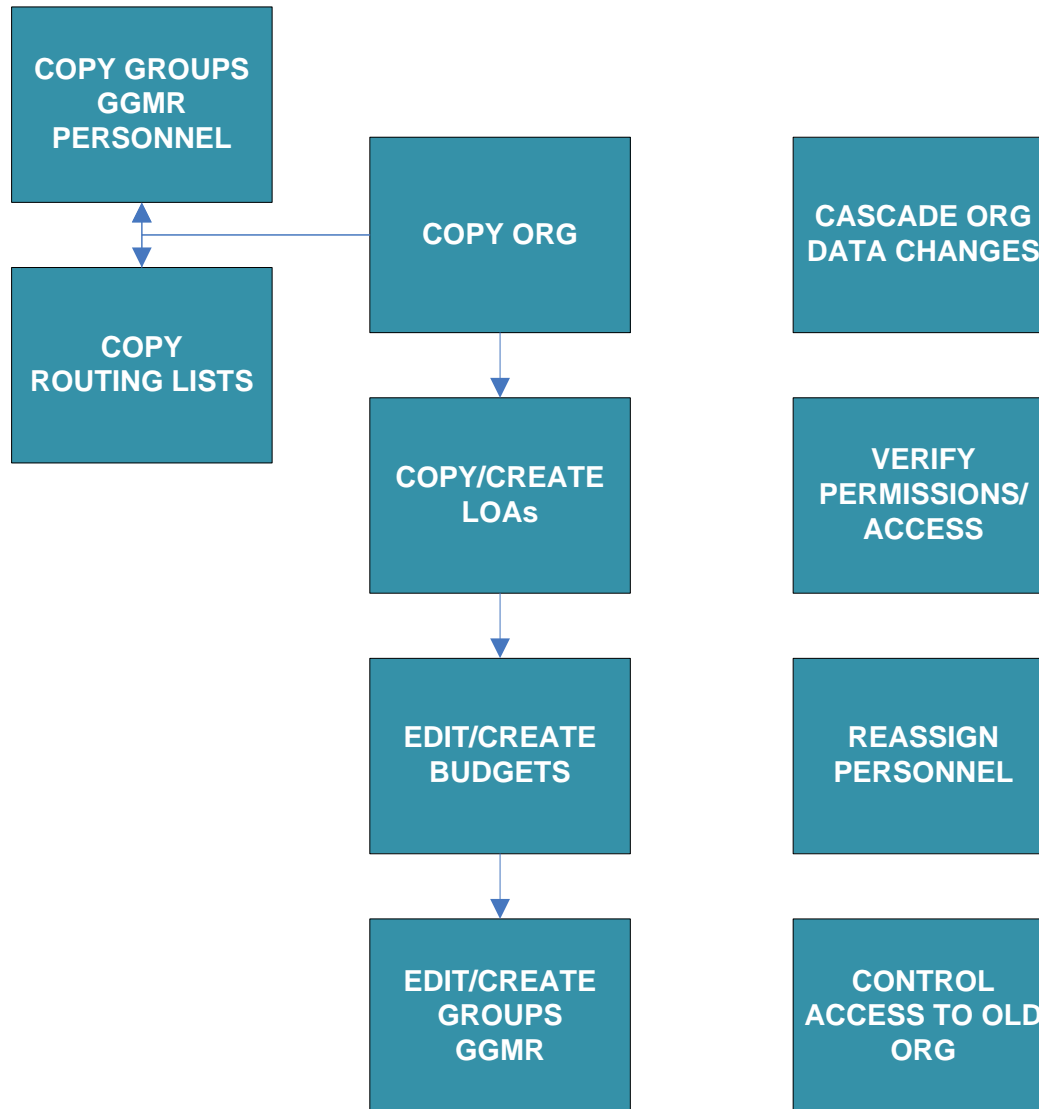
Deleting an Organization

- Organizations with used budgets can not be deleted
- Delete unused budgets
- Ensure all personnel are reassigned or detached (View Person List)
- Ensure all documents are processed
- Delete LOA, Routing Lists (non-default), Groups and GGMR
- Inactivate Commercial Travel Office information
- Change organization description. Recommend adding 'DO NOT USE' or replacing the organization name with a '.' (Prevents travelers from registering to the old organization)





Summary of Re-Org Process





Resources



DTMO Website

- Access eLearning, instructor resources, and reference materials through Training Resource Lookup Tool
- Change Profile Information Chart

www.defensetravel.dod.mil



Travel Explorer (TraX)

- DTA Manual Appendix L
- DTA Manual Chapters 2, 6, 8 and 10

www.defensetravel.dod.mil/Passport



Travel Assistance Center (TAC)

- 1-888-Help1-Go (1-888-435-7146)
- Overseas: Use DSN to dial directly
- 24 hours a day/7 days a week
- Submit a Help Ticket through the Tickets section of TraX