

CHAPTER 6: GROUPS

In the Defense Travel System (DTS), a group is an electronic list of travelers' names. The Groups module allows users who have group access to open and edit group members' profiles and travel documents at any time. Defense Travel Administrators (DTAs) use the Groups module to maintain traveler data and manage travel documents. This chapter covers the following topics:

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6.1 Groups in DTS

Groups are used in DTS to limit access to travelers' personal information to the users who are authorized to access that group. This protection of personal information complies with the Privacy Act. The Groups module also facilitates higher-level access for management, help desk, and Travel Assistance Center (TAC) support.

Travelers must belong to a group, the LDTA needs to make sure each travel is assigned to one. Travelers may belong to more than one group.

Unlike organizations, groups are non-hierarchical. One group may include travelers who belong to organizations of different levels, all members of the group have been assigned to it because of a common factor related to accessing their documents. There is no relationship between groups and routing lists, reports, accounting, or budgets.

Group names are controlled at the local level. Specific permission levels allow DTAs to create a name for a group and add members. DTAs consider the organization hierarchy and routing lists to decide which organizations need a group to facilitate data maintenance, document preparation, and help desk support. The DTA uses the information to determine the number of groups an organization needs.

DTAs maintain the group membership for organizations the DTA has access to. Travelers may be added to groups by two methods:

- Manually, one at a time. See Section 6.3.5.3
- Automatically, as part of an organization, through Global Group Membership Rules (GGMRs). See Section 6.3.6

DTAs may grant group access to clerks, Non-DTS Entry Agents (NDEAs), and others to allow access to the personal data and documents of travelers. Group access is not associated with any specific permission levels.

6.1.1 Main Group

The main group encompasses all travelers belonging to a main organization, from the top level in the naming sequence to the lowest-level subordinate organization (suborganization). The main group can provide the local help desk with access to all travelers' documents, and allows the help desk to research rejects or errors. The Lead DTA (LDTA) should ensure each traveler is a member of one group.

6.1.2 Other Groups

DTAs may create other groups at various levels to allow authorized users access to specific traveler information and to create or update authorizations for travelers. The users include Service or Agency DTAs, unit clerks, Centrally Billed Account (CBA) Specialists, CBA-DTAs, Transportation Officers (TOs), all Routing Officials, and help desk personnel. Each group is created as a stand-alone entity. Examples of other groups are as follows:

- *Organization Group*: The most common group in DTS. Created and maintained at the lowest level where a clerk or other administrative support is available. There is no requirement for a group to be created for each organization. See Section 6.2 for an explanation of planning for groups.
- *Service or Agency Group*: Facilitates the support activities provided by the service or agency program office.
- *Routing List Group*: May be created and maintained for an organization with two or more distinct sets of personnel using different routing lists with different approval chains and separate sets of travel records. There is no requirement for a group to be created for each routing list or AO.

Note: There is no such structure as a *subgroup* in DTS. Groups created in DTS are not hierarchical.

Although groups are not hierarchical, the organizations that they serve are. The Organization DTA (ODTA) can *look down* the organization's hierarchy and either establish the GGMR or individually add and delete group members. DTAs with lower-level organization access cannot see any organizations higher in the hierarchy than their own. They cannot see a group that belongs to a higher-level organization.

Large organizations may have one group or multiple groups, depending on the organization's information or document management needs. This allows travelers to be placed in more than one group when their duties require them to work in areas other than their assigned organization. Each group is a separate entity; manually adding a traveler to the group for the organization does not add the same traveler to another group. Travelers must be manually added to each group *unless* a GGMR is used. This process is explained in Section 6.3.6.

6.2 Planning for Groups

It is important to plan carefully before naming and creating groups. The below steps will guide DTAs in planning, creating, and maintaining groups in DTS:

1. Identify the organization that will own the group and the individuals who will be granted group access. All organizations must have at least one group, while others may have more groups, depending on the need for document access.
2. Identify the group or groups to which the organization's GGMR will apply.
3. Establish the group structure with appropriate group access.

This chapter describes groups and the steps to create groups in DTS.

6.2.1 Group Structure Example

In DTS, an organization chart can identify organizations that require a group. Each organization should identify the individuals who need access to travelers' documents. An example of an organizational chart is shown in Figure 6-1.

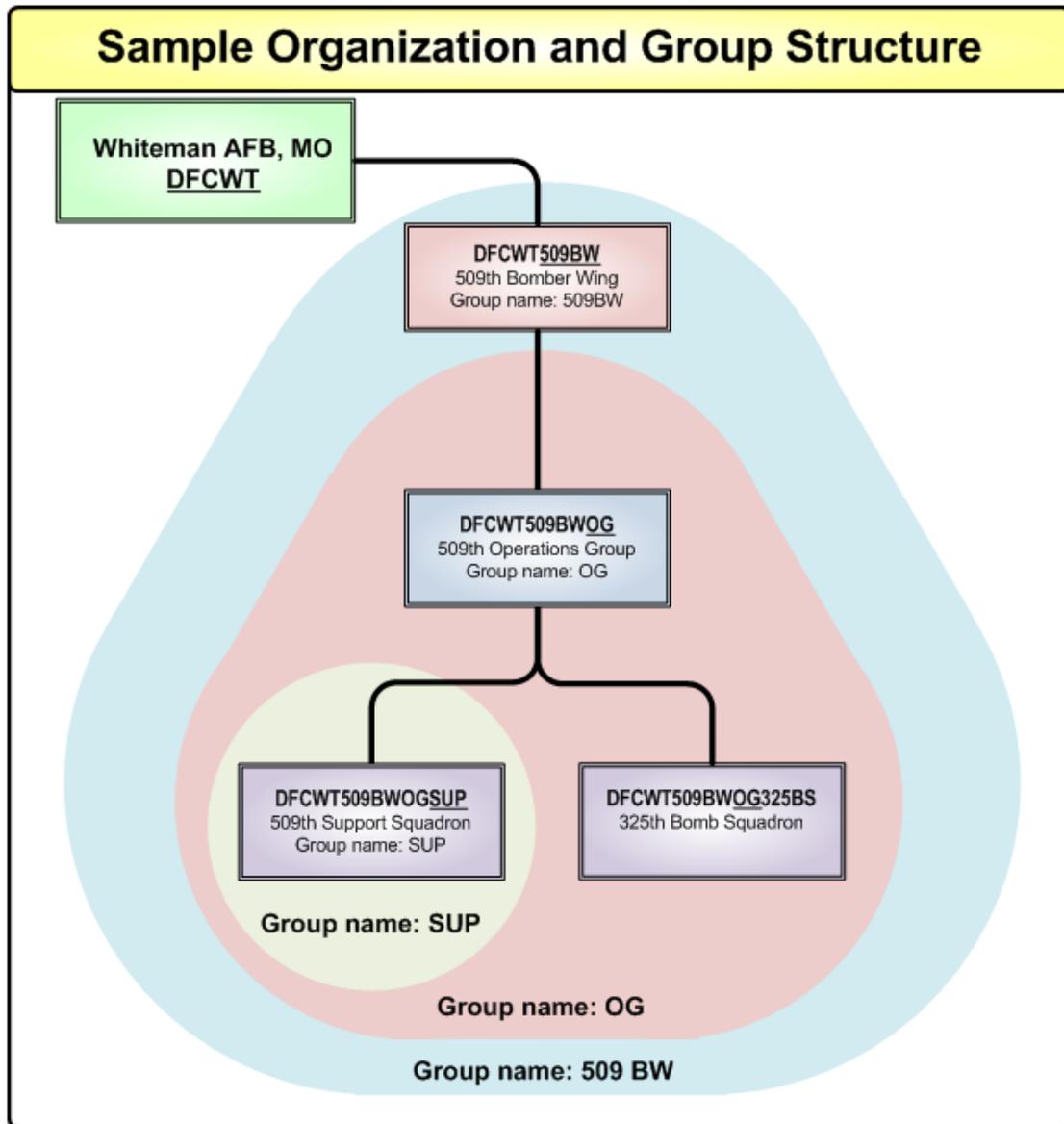


Figure 6-1: Example of Organization Structure for 509th Bomb Wing

Start at the lowest-level organization (DFCWT509BWOGS^{SUP}) and read up the organization chart. In the example, DFCWT509BWOGS^{SUP} has a clerk who maintains traveler data and creates documents. This organization needs a group.

Note: DTS uses group identifiers because different organizations may use the same name for their groups. The group identifier has two parts: a DTS organization name and the group name.

The next higher organization (DFCWT509BWOG) has a clerk and a DTA who support the DFCWT509BWOGSUP and DFCWT509BWOG325BS organizations. A group will be created here so that a GGMR can be built for each organization. This is done to ensure that all travelers assigned to either organization are members of this group.

The highest organization (DFCWT509BW) has a clerk and DTA who support the DFCWT509BWOG, DFCWT509BWOGSUP, and DFCWT509BWOG325BS organizations. A group will be created here to ensure all travelers in the lower level organizations are members of this group.

6.2.2 Group Structure Summary

The group structure for a main organization consists of the following:

- Names of groups to be created
- Group Organization Owner Name
- List of personnel who require group access to each group
- GGMR for each organization

This group structure or mapping of organizations to groups, access, and membership must be maintained in order to facilitate any changes. The group structure is another part of the road map for setup and ongoing maintenance of DTS for any site. Table 6-1 through Table 6-5 illustrates the group structure worksheets for the four service branches and DoD agencies.

Table 6-1: Sample Army Group Structure Worksheet

SAMPLE ARMY GROUP STRUCTURE WORKSHEET								
Membership Organization Name	Create Groups Part 1		Group Memberships Part 2					
	Group Name	Group Access	Main Group Org Owner Name	Main Group Name	Group Org Owner Name 1	Group Name 1	Group Org Owner Name 2	Group Name 1
DA624 Main Org	Main	LDTA, Help Desk						
DA624OSS Special Staff	SStaff	ODTA S-1	DA624	Main	DA624OSS	SStaff		
DA624OPS Ops HQ	OPS	ODTA, Admin Clerk	DA624	Main	DA624OPS	OPS		
DA624OPSFLT Ops Flight Det.	OPSF	ODTA Admin Clerk	DA624	Main	DA624OPS	OPS	DA624OPSFLT	OPSF
DA624OPSSPT Ops Support Det.	OPSS	ODTA, AO Admin Clerk	DA624	Main	DA624OPS	OPS	DA624OPSSPT	OPSS
DA624BSE Base Hq. Det.	BASE1	ODTA, AO1 Admin Clerk	DA624	Main	DA624BSE	BASE1		
DA624BSE Base Hq. Det.	BASE2	ODTA, AO2 Admin Clerk	DA624	Main	DA624BSE	BASE2		

Table 6-2: Sample Navy Group Structure Worksheet

SAMPLE NAVY GROUP STRUCTURE WORKSHEET						
Membership Organization Name	Create Groups Part 1		Group Memberships Part 2			
	Group Name	Group Access	Main Group Org Owner Name	Main Group Name	Group Org Owner Name 1	Group Name 1
DN11N4	N4	LDTA, FDTA, Help Desk	DN	DN	DN11	DN11
DN11N4	N40	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N41	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N41ADM	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N42	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	ADMN43	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N43	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N45	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N46	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11
DN11N4	N4FO	AO, NDEA, Travel Clerk	DN	DN	DN11	DN11

Table 6-3: Sample Marine Corps Group Structure Worksheet

SAMPLE MARINE CORPS GROUP STRUCTURE WORKSHEET								
Membership Organization Name	Create Groups Part 1		Group Memberships Part 2					
	Group Name	Group Access	Main Group Org Owner Name	Main Group Name	Group Org Owner Name 1	Group Name 1	Group Org Owner Name 2	Group Name 2
DM6154	MCAS	LDTA, Help Desk	DM6154	MCAS				
DM6154026	StationGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP		
DM6154026HHS	HHSGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026HHS	HHSGP
DM6154026HHS	HHSADMGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026HHS	HHSADMGP
DM6154026MCCS	MCCSGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026MCCS	MCCSEP
DM6154026PMO	PMOGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026PMO	PMOGP
DM6154026S3	S3GP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026S3	S3GP
DM6154026S4	S4GP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026S4	S4GP
DM6154026S6	S6GP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026S6	S6GP
DM6154026SS	SSGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026SS	SSGP
DM6154026SUP	SupplyGP	ODTA, Admin Clerk	DM6154	MCAS	DM6154026	StationGP	DM6154026SUP	SupplyGP

Table 6-4: Sample Air Force Group Structure Worksheet

SAMPLE AIR FORCE GROUP STRUCTURE WORKSHEET								
Membership Organization Name	Create Groups Part 1		Group Memberships Part 2					
	Group Name	Group Access	Main Group Org Owner Name	Main Group Name	Group Org Owner Name 1	Group Name 1	Group Org Owner Name 1	Group Name 1
DFCEJ	EAFB	LDTA, Help Desk	DFCEJ	EAFB				
DFCEJ028BWSS	SSTAFF	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS S	SStaff		
DFCEJ028BWSSCPTS	CPTS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS S	SStaff	DFCEJ028BWSSCPTS	CPTS
DFCEJ028BWSG	SG	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG		
DFCEJ028BWSGCC	CC	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGCC	CC
DFCEJ028BWSGSVS	SVS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGSVS	SVS
DFCEJ028BWSGMSS	MSS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGMSS	MSS
DFCEJ028BWSGCES	CES	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGCES	CES
DFCEJ028BWSGSFS	SFS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGSFS	SFS
DFCEJ028BWSGCS	CS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJ028BWSGCS	CS

Table 6-5: Sample Agency Group Structure Worksheet

SAMPLE AGENCY GROUP STRUCTURE WORKSHEET										
Membership Organization Name	Create Groups Part 1		Group Memberships Part 2							
	Group Name	Group Access	Main Group Org Owner Name	Main Group Name	Group Org Owner Name 1	Group Name 1	Group Org Owner Name 2	Group Name 2	Group Org Owner Name 3	Group Name 3
DD	DD									
DD19	DD19	Agency Rep	DD	DD						
DD19RIC	DD19RIC	LDTA, FDTA, Help Desk	DD	DD	DD19	DD19				
DD19RICUF	DORRA	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC		
DD19RICGA	DD19RICGA	LDTA, FDTA, Help Desk	DD	DD	DD19	DD19	DD19RIC	DD19RIC		
DD19RICGAB	B	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC	DD19RICGA	DD19RICGA
DD19RICGACKF	CKF	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC	DD19RICGA	DD19RICGA
DD19RICGADG	D	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC	DD19RICGA	DD19RICGA
DD19RICGADG	DG	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC	DD19RICGA	DD19RICGA
DD19RICGADG	DI	ODTA, AO, NDEA, Travel Clerk	DD	DD	DD19	DD19	DD19RIC	DD19RIC	DD19RICGA	DD19RICGA

6.3 Groups

The DTA uses the DTA Maintenance Tool to update, remove, and create groups for the organization.

The DTA can create and update groups for the organizations they have access to. This access is based on the organization's hierarchical setup within DTS. The Search Groups and Create Groups screens limit choices are based on organizational access.

The Groups feature of the DTA Maintenance Tool allows DTAs to create and maintain group data, and view lists of group data. Groups can be created, updated, and removed, and people can be added or removed from those groups manually and automatically.

To perform DTA functions related to groups, select **Groups** from the DTA Tools drop-down list (Figure 6-2).



Figure 6-2: DTA Maintenance Tool Home Page

The Search Group(s) screen opens by default (Figure 6-3). Three topics display in the navigation bar: Group(s), Individual Group Members, and Global Membership. Each task has a link, as follows:

- *Group(s)*. Search, Create, and View List
- *Individual Group Members*. Search, Add, and View List
- *Global Membership*. Search, Add, Global Edit, and View List

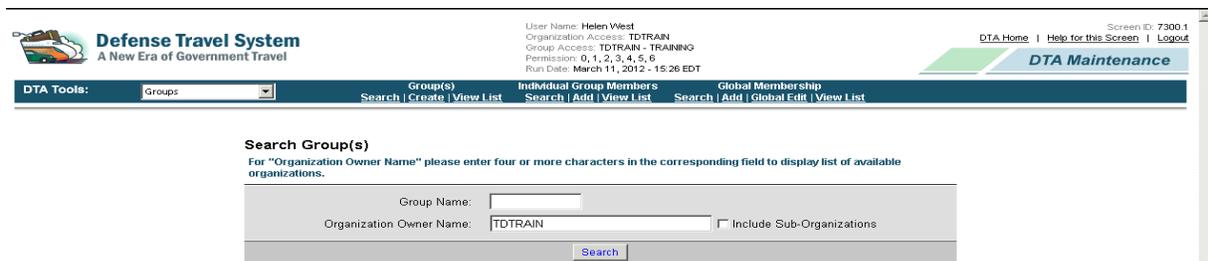


Figure 6-3: Search Group(s) Screen

DTAs may access any group they can view in the DTA Maintenance Tool, and perform tasks as needed.

6.3.1 Search for Group(s)

If a DTA needs to see a list of groups in the organization, or if a DTA wants to delete a group, the DTA may need to search for the group(s) in DTS. Follow the below steps to perform a search for groups:

1. Select **Groups** from the DTA Tools drop-down list.
2. Enter the name of the group in the **Group Name** field. Leaving this field blank broadens the search and will return more results.

The organization to which the DTA has access displays as the default in the Organization Owner Name text box.

3. Type the organization name in the **Organization Owner Name** text box. If you have several organizations that you are responsible for, a list will appear as you are typing, choose the organization to search for the group.

Selecting a sub-organization from the list limits the search to that sub-organization. DTAs can expand the range of organizations searched by checking the **Include Sub-Organizations** box.

4. Select **Search**.

The list of groups that is returned in the Group(s) Search Results screen depends on the search criteria and DTA's organization access.

6.3.2 Delete Groups

Based on the DTA's organization access, DTS limits the tasks that can be performed in the DTA's hierarchical setup. One task is deleting a group from DTS.

Data integrity checks prevent DTAs from deleting any groups in DTS if there are still members assigned to the group. Travelers with access to a group that has been deleted will have their group access changed to *None*.

The below actions need to be completed before deleting a group from DTS:

- *Verify that the group prepared for deletion has the correct organization owner and group pair.* Occasionally, organizations in a hierarchical setup may have the same name for their groups. Groups are not hierarchical and are not restricted in that manner. One organization cannot have two groups with the same name; however, two different organizations may use the same name for their groups.
- *Confirm that all members of the group to be deleted have been removed:* All members of the selected group must be removed and may be reassigned to another group.

Follow the below steps to delete a group from DTS:

1. Select **Groups** from the DTA Tools drop-down list.
2. Enter the name of the group in the **Group Name** field or select the **Organization Owner Name** drop-down list to select the organization that owns the group that will be deleted.

When a traveler's organization of assignment is changed in the DTA Maintenance Tool, the GGMRs for the detaching organization are automatically removed. The GGMRs of the new organization (receiving organization) are triggered for the traveler.

3. Select **Search**.
4. Select **Delete** next to the group to delete.

The Delete Group screen opens.

5. Verify the Organization Owner Name and the Group Name to confirm that this is the correct group to be deleted. *Groups cannot be recovered after they have been deleted.*
6. Select **Delete Group**.

Once the group has been deleted, the results screen refreshes. The remaining active groups are shown for the organization (Figure 6-4).



Figure 6-4: Group(s) Search Results Screen

6.3.3 Create Groups

DTAs can create groups based on the organization setup and access in DTS. When creating groups, create an “empty shell” where members will be assigned. After new groups have been created, travelers can be added to any group. See Section 6.3.5.3 for guidance on manually adding individual members, or Section 6.3.6.2 for guidance on using GGMRs to add members automatically.

Follow the below steps to create a new group in DTS:

1. Select **Groups** from the DTA Tools drop-down list.
2. Select **Create** on the navigation bar below *Group(s)*.

The Create Group screen opens (Figure 6-5).

Figure 6-5: Create Group Screen

3. Enter the name of the group in the **Group Name** field. The group name should identify its members and its purpose.
4. Type the organization name in the **Organization Owner Name** text box.
5. Select **Save Group**.

6.3.4 View Group Structure List

The Group Structure List displays a list of all the groups in a specified organization.

Follow the below steps to view the Group Structure List:

1. Select **Groups** from the DTA Tools drop-down list.
2. Select **View List** on the navigation bar below *Group(s)*.

The View Group Structure List screen opens (Figure 6-6).

Figure 6-6: View Group Structure List

3. Select the **Organization Name** drop-down list and choose the organization.
-OR-
Select the **magnifying glass** icon to search the organization list.

Only the organizations that the DTA has access to will display in the list.

4. Select the **Include Sub-Organizations** box to include sub-organizations in the report.
5. Select **Run Report**.

The DTA is prompted to download the report. The report may be saved on the computer or viewed in a separate window as an Excel spreadsheet.

6. Select **Open** to display the report on the screen.
-OR-
Select **Save** to download the file to the hard drive.
-OR-
Select **Cancel** to cancel the action and return to the previous screen.

6.3.5 Search, Remove, Add, and View Group Members: Manual Method

In Groups of the DTA Maintenance tool, the Search, Add, and View List links display on the navigation bar below Individual Group Members. The purpose of each link is explained below:

- **Search** allows a DTA to view a group's membership list and remove members
- **Add** allows a DTA to add members to a group
- **View List** allows a DTA to view the membership list of a group

6.3.5.1 Search for Group Members

Follow the below steps to search for individual group members:

1. Select **Search** on the navigation bar below *Individual Group Members*.

The Search Individual Group Member(s) List screen opens (Figure 6-7).

The screenshot shows the 'Search Individual Group Member(s)' screen. At the top, there is a navigation bar with 'DTA Tools: Groups' and 'Individual Group Members' (Search | Add | View List). Below the navigation bar, the search form is displayed. It includes a title 'Search Individual Group Member(s)' and a note: 'For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.' The form has the following fields: 'Organization Owner Name' (text field with 'TDTRAIN' entered), 'Group Name' (drop-down menu with 'Select One ...'), 'Member SSN' (text field), 'Member Last Name' (text field), and 'Member First Name' (text field). There is also a checkbox labeled 'Include group members added through Global Group Membership' which is currently unchecked. A 'Search' button is located at the bottom of the form.

Figure 6-7: Search Individual Group Member(s) Screen

2. Type in the organization name in the **Organization Owner Name** text field.
3. Select the **Group Name** drop-down list and select the group to search for the member.

The selections in the Group Name drop-down list are limited to the groups that have already been created for the organization.

To limit the number of entries returned in the search, complete the **SSN** field. The DTA may also enter all or part of the member's last name and all or part of the first name.

To broaden the search to include members added through GGMR, select the **Include group members added through Global Group Membership** box.

4. Select **Search**.

The Individual Group Member(s) (Search Results) screen displays names that are currently members of the selected group. It also displays each member's SSN, organization, and the method by which the member was added to the group. If Automatic is displayed in the Add Method column for a member, this means that person was added using a GGMR.

6.3.5.2 Remove Members From a Group Manually

Members who were added to a group manually can be removed from the group manually. If a traveler is removed from a group, the DTA will need to make sure the traveler still belongs to at least one group.

Follow the below steps to remove a member from a group manually:

1. Complete Steps 1 through 4 in Section 6.3.5.1 to search for the member to be removed from the group.

The Individual Group Member(s) Search Results screen opens (Figure 6-8).

Individual Group Member(s) (Search Results)				
Organization Owner Name: TDZDTMOCSD			Member SSN:	
Group Name: TRAVEL			Member Last Name:	
Include Global Group Members: Yes			Member First Name:	
Edit	Member Name	Member SSN	Member Organization	Add Method
<input type="button" value="Remove"/>	CARSON, CHRIS A	XXXX0737	TDZDTMOCSD	Manual
	CARSON, EMILY A	XXXX0737	TDZDTMOCSD	Automatic
	Carson, Eric T	XXXX3732	TDZDTMOCSD	Automatic
	Carson, Kim T	XXXX4520	TDZDTMOCSD	Automatic
<input type="button" value="Remove"/>	Carsonc, Eric T	XXXX6420	TDZDTMOCSD	Manual
	CARSONc, HELEN D	XXXX6643	TDZDTMOCSD	Automatic
	CARSONk, ERIC T	XXXX0026	TDZDTMOCSD	Automatic
	Washington, Martha	XXXX6645G	TDZDTMOCSD	Automatic
	Zurcher, Chris A	XXXX9936	TDZDTMOCSD	Automatic
	Zurcher, Eric T	XXXX9148	TDZDTMOCSD	Automatic
1 - 10 of 10				

Figure 6-8: Individual Group Member(s) Search Results Screen

2. Verify that the selected individual is the one to be deleted. *DTS will not prompt the DTA to confirm the deletion of the selected group member.*
3. Select **Remove** next to the member's name.

The screen refreshes and the traveler's name is no longer displayed.

This method only applies to members who were added to the group manually. If the Add Method column reads *Automatic*, it means that the traveler was added through GGMR. Members who were added to the group through GGMR can only be removed by first changing the method of entry to the group from automatic to manual. This will override the entry method from automatic to manual, thus making the Remove button available for that member to be removed from the group.

6.3.5.3 Add Members to a Group

The Add link allows members to be added to groups. DTAs can add users to groups in the organization setup. The Group Name list displays only groups owned by the selected organization. Individuals may be added by SSN, or by using the Search feature.

Note: To view all the groups that list a traveler as a member, use the steps listed in Chapter 7, Section 7.3.5.

6.3.5.3.1 Add Members by SSN

Follow the below steps to add a member to a group:

1. Select **Add** on the navigation bar below *Individual Group Members*.

The Add Individual Group Member screen opens (Figure 6-9).

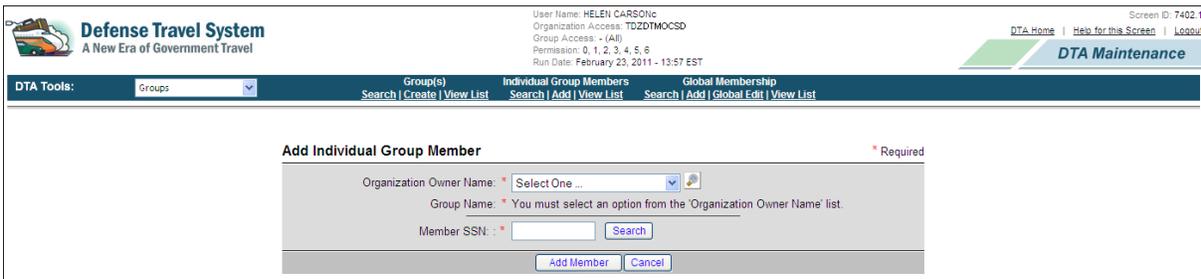


Figure 6-9: Add Individual Group Member Screen

2. Select the **Organization Owner Name** drop-down list and select the organization.

The Organization Owner Name drop-down list displays only the organizations to which the DTA has access.

3. Select the **Group Name** drop-down list and select the group to which the member will be added.

4. Complete the **SSN** field.

-OR-

Select **Search** to find the person by name. See Section 6.3.5.3.2.

5. Select **Add Member**.

The Individual Group Member(s) Search Results screen opens to display the new member's name added to the selected group.

6.3.5.3.2 Add Members by Name

When manually adding members to a group, the easiest way to add a member to a group is by SSN, if it is known. If the SSN is not known, use the Search button to search for the person by last name or last name and first name combination.

Follow the below steps to search for a person to add to a group:

1. Select **Search** on the Add Individual Group Member screen.

The Search People screen opens.

2. Type the organization name in the **Organization Name** text field and choose the organization to search. If the traveler's organization is not known, select the **Include Sub-Organizations** box to search all organizations.

3. Complete the **SSN** field or enter all or part of the person's last name in the **Last Name** field. The first name field is optional.

4. Select **Search**.

The Search People Results screen opens.

5. Choose **Select** to the left of the person's name to add to the selected group.

The Add Individual Group Member screen opens.

6. Select **Add Member**.

The Individual Group Member(s) Search Results screen displays the new member's name to the selected group.

6.3.5.4 View Group Member List

The Group Member List displays a membership list of the group.

Follow the below steps to view the Group Member List:

1. Select **Groups** from the DTA Tools drop-down list.
2. Select **View List** on the navigation bar below *Individual Group Members*.

The View Group Member List screen opens

3. Type the organization name in the **Organization Owner Name** text field. The DTA's organization access limits what organizations are available.
4. Select the **Group Name** drop-down list and select the group.
5. Select **Run Report**.

The DTA is prompted to download the report. The report may be saved to the computer or viewed in a separate window as an Excel spreadsheet.

6. Select **Open** to display the report on the screen.
- OR-
- Select **Save** to download the file to the hard drive.
- OR-
- Select **Cancel** to cancel the action and return to the previous screen.

6.3.6 Search, Remove, Add, and View Group Members Using GGMR: Automatic Method

GGMR is the feature that DTAs may use to add and remove members automatically to a group. The rule specifies the group(s) that all persons are assigned to a specific organization. As DTAs add groups to their organization's GGMR(s), all persons currently assigned to the organization are added automatically to the groups. Likewise, when DTAs remove a group name from the organization's rule, all persons assigned to the organization are removed from the group.

As persons are received into the organization, their names are added automatically to each of the organization's groups. Members added via GGMR are not automatically removed from the group membership list when reassigned to a different organization.

6.3.6.1 Search for GGMRs

The Search Organization to Manage Global Group Membership screen allows DTAs to identify the GGMRs established for the selected organization.

1. Select **Search** on the navigation bar below *Global Membership*.

The Search Organization to Manage Global Group Membership screen opens (Figure 6-10).

The screenshot shows the 'Search Organization to Manage Global Group Membership' screen. At the top left is the 'Defense Travel System' logo with the tagline 'A New Era of Government Travel'. To the right, user information is displayed: 'User Name: HELEN CARSONIC', 'Organization Access: TDZDTMOCSD', 'Group Access: - (All)', 'Permission: 0, 1, 2, 3, 4, 5, 6', and 'Run Date: February 23, 2011 - 14:01 EST'. A 'DTA Home' link and 'Help for this Screen' link are also present. The navigation bar includes 'DTA Tools:' with a 'Groups?' dropdown, and three main sections: 'Groups(s)', 'Individual Group Members', and 'Global Membership'. The 'Global Membership' section is active, showing 'Search | Add | Global Edit | View List'. The main content area has a title 'Search Organization to Manage Global Group Membership' with a '* Required' indicator. Below the title are three input fields: 'Member Organization Name' (a dropdown menu with 'TDZDTMOCSD' selected), 'Group Organization Owner Name' (an empty text box), and 'Group Name' (an empty text box). A 'Search' button is located at the bottom of the form area.

Figure 6-10: Search Organization To Manage Global Group Membership Screen

2. Select the **Member Organization Name** drop-down list to select the organization to search.
3. (Optional) Complete the **Group Organization Owner Name** field if the organization is known.
4. Complete the **Group Name** field if the group is known.
5. Select **Search**.

The Global Group Membership (Search Results) screen opens.

6.3.6.1.1 Remove Group Members Using GGMR

The Remove Global Group Membership function allows a DTA to remove all members of a group at once.

Follow the below steps to remove a group from an organization's GGMRs:

1. Search for the group to remove by following the steps listed in Section 6.3.6.1.

The Global Group Membership (Search Results) screen opens.

2. Select **Remove** in the Edit column to the left of the Group Organization Owner Name.

The Remove Global Group Membership screen opens.

3. Select **Remove Global Membership** to remove the GGMR from the selected group.

The Global Group Membership Search Results screen opens, excluding the GGMR that was just removed.

6.3.6.2 Add a GGMR

Global Group Membership Rules establish and maintain an organization's group membership structure. A rule is created that controls automatic updates to the group membership list based on the members' organization of assignment. As groups are added to the organization's GGMRs, all travelers assigned to the organization are added automatically to the group. When the DTA removes a group name from the organization's rule, all persons assigned to the organization are removed from that group.

As persons are assigned to an organization, their names are added automatically to each of the group membership lists.

Members added via GGMR are not removed from the group membership list when reassigned to a different organization.

Follow the below steps to add Global Group Membership:

1. Select **Add** on the navigation bar below *Global Membership*.

The Add Global Group Membership screen opens (Figure 6-11).

Figure 6-11: Add Global Group Membership Screen

2. Select the **Member Organization Name** drop-down list to select the organization. (All users and travelers in this organization will be included in the GGMR.)
3. Complete the **Group Organization Owner Name** field with the name of the organization with which the group will be associated.
4. Complete the **Group Name** field with the name of the group.
5. Select **Add Global Membership** to create the GGMR.

Repeat Steps 1 through 5 for each group name to be added to the GGMR.

6.3.6.3 Global Edit

The Global Edit feature allows the DTA to add all members of an organization to a group, or delete all members of an organization from a group.

Follow the below steps to perform a Global Edit:

1. Select **Groups** from the DTA Tools drop-down list.
2. Select **Global Edit** below *Global Membership*.

The Search Organization(s) screen opens (Figure 6-12).

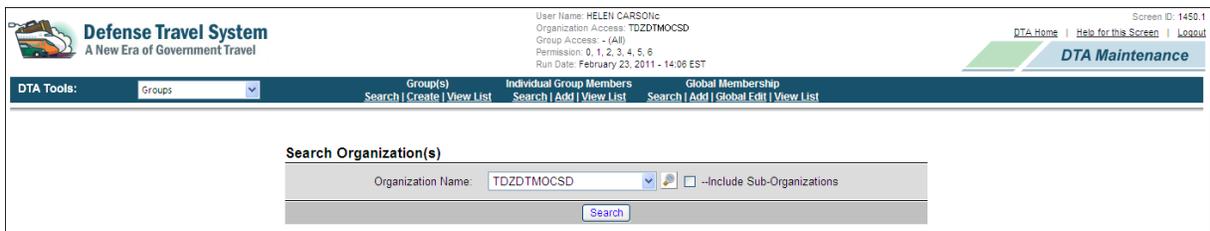


Figure 6-12: Search Organizations Screen

3. Type the organization name in the **Organization Name** text field.
4. Check the **Include Sub-Organizations** box to include sub-organizations in the report.

5. Select **Search**.

The Global Edit screen opens, listing results by organization.

6. Complete the **Group Organization Owner Name** and **Group Name** fields to identify the group to add or delete members.
7. Select the **box** for the organization whose members are to be added to or deleted from the group.
8. Select **Global Delete** at the bottom of the screen to delete all members of the organization from the group.
-OR-
Select **Global Add** at the bottom of the screen to add all members of the organization to the group.

The Global Edit screen refreshes.

6.3.6.4 View Global Group Membership List

The Global Group Membership List displays a list of all the groups that belong to the identified organization.

Follow the below steps to view the Global Group Membership List:

1. Select **Groups** from the DTA Tools drop-down list.
2. Select **View List** on the navigation bar below *Global Membership*.

The View Global Group Membership List screen opens (Figure 6-13).

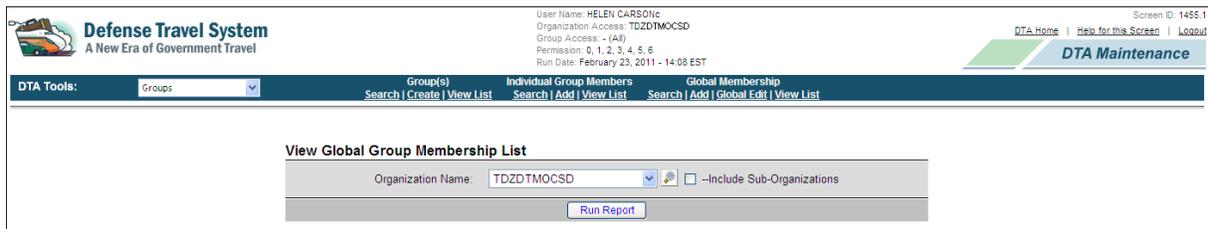


Figure 6-13: View Global Group Membership List Screen

3. Type the organization name in the **Organization Name** text field.
4. Select the **Include Sub-Organizations** box to include sub-organizations in the report.
5. Select **Run Report**.

The DTA is prompted to download the report, which may be saved to the computer or viewed in a separate window as an Excel spreadsheet.

6. Select **Open** to display the report on the screen.
-OR-
Select **Save** to download the file to the hard drive.
-OR-
Select **Cancel** to cancel the action and return to the previous screen.

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