APPENDIX L: REORGANIZING DTS ORGANIZATIONS

When a DoD organization changes, the current DTS organization may need to reflect those changes. A formal reorganization, an organization name change, or reassignment of personnel are examples of situations that may require a need for reorganization. This chapter covers the following topics:

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L.1 Reorganization Overview

The DTA Maintenance Tool provides certain functionalities that are used during reorganization in DTS. Table L-1 briefly describes each function and its purpose in the reorganization process.

Table L-1: DTS Functionalities for Reorganizations

DTS FUNCTIONALITIES FOR REORGANIZATIONS	
DTS FUNCTIONALITY	**PURPOSE IN REORGANIZATION**
Copy Organizations	Copy an organization and save it to a create a new organization with a new name. Includes the following options: - Copy routing lists - Copy groups and Global Group Membership Rules (GGMRs)
Mass Reassignment of Personnel	Transfer the personal profiles from one DTS organization into as many as five organizations.

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Table L-1: DTS Functionalities for Reorganizations

DTS FUNCTIONALITIES FOR REORGANIZATIONS	
Cascade Organization Data Changes to Personnel	Copy data to suborganizations and personnel.
Update Default Lines of Accounting (LOA)	Assign, change, or remove a default LOA to all of the personal profiles within an organization at the same time.
Global Routing List Maintenance	Add or remove a common step in copied routing lists.
Copy LOAs	Copy LOAs into a new organization.

L.2 Reorganization Process

This process is an introduction on the reorganization capability in the DTA Maintenance Tool. Optional Step A may be used, and Optional Step B is recommended. Experienced users may prefer to use the steps in a sequence that is better suited to their organizations.

The DTA uses the DTA Maintenance Tool to perform the steps for the reorganization process as listed below:

Step 1. Create or copy an organization structure and save it as a new organization
Optional Step A: Copy routing list(s)
Optional Step B: Copy groups and GGMRs
Step 2. Update GGMR (*DTA Manual* Section 6.3.6)
Step 3. Reassign personnel to new organization en masse
Step 4. Cascade organization data changes to suborganizations and personnel
Step 5. Create LOAs (*DTA Manual* Section 8.3.8).
Step 6. Update default LOA
Step 7. Modify budget shell (*DTA Manual* Section 9.3.1.1)
Step 8. Delete structures of the former organization (*DTA Manual* Section 4.4.1.3)

Note: DTAs must capture all necessary data for reporting purposes before performing Step 3: Reassign personnel. DTS reports are based on the traveler's organization at the time the authorization, voucher or local voucher was first created. After DTAs are reassigned and their group access changed, they may not be able to access the former organizations. It is possible to grant the DTA access to the former organization by using a second profile. Travel Assistance Center (TAC) personnel have access to the two-profile process. Figure L-1 illustrates the reorganization process.

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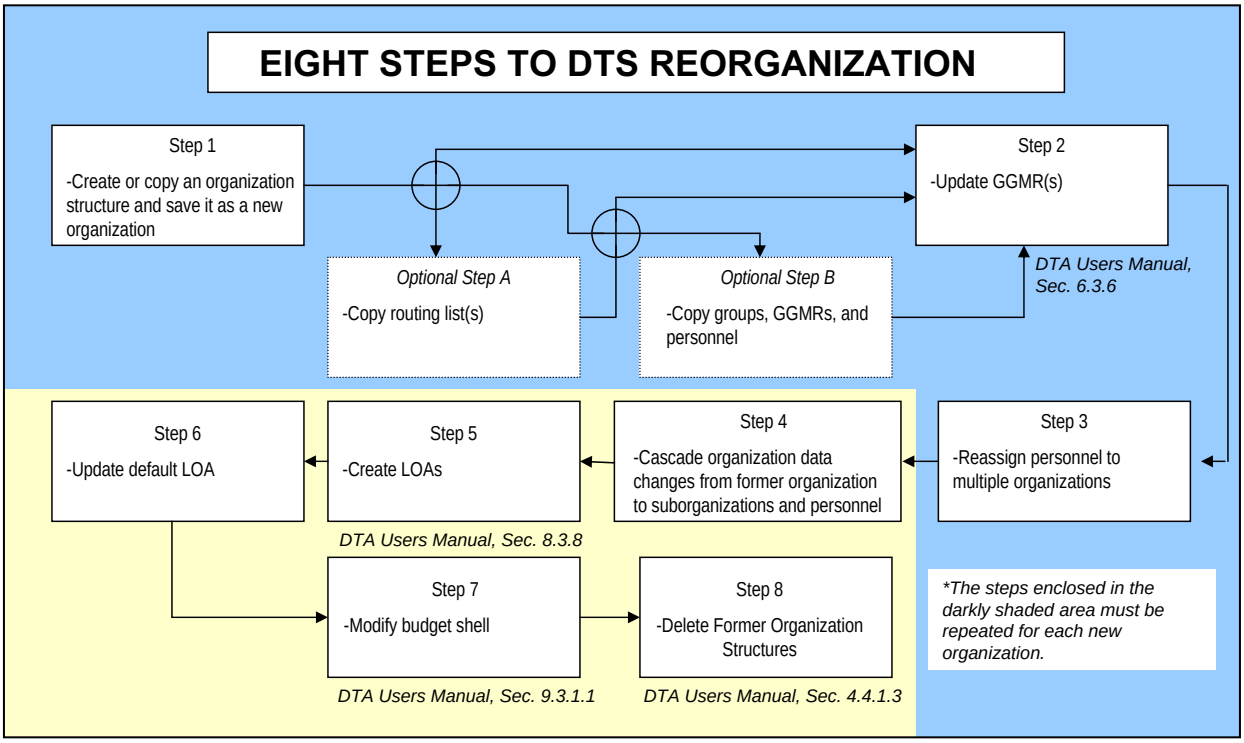

Figure L-1: Eight Steps to DTS Reorganization

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L.2.1 Step 1. Copy an Organization and Save it as a New Organization

The DTA should be familiar with the current organization structure (within the DTA's organization access) before copying an organization to save as a new organization.

L.2.1.1 Determine Organization Structure

To display the current organization structure, the DTA must include all suborganizations when searching for the existing organization (*DTA Manual*, Section 4.4.1).

Beginning on the DTA Maintenance Tool Home page, use the below steps to search for an organization and determine the organization structure:

1. Select the **DTA Tools:** drop-down list and select **Organizations**.

The Search Organization(s) screen opens (Figure L-2).

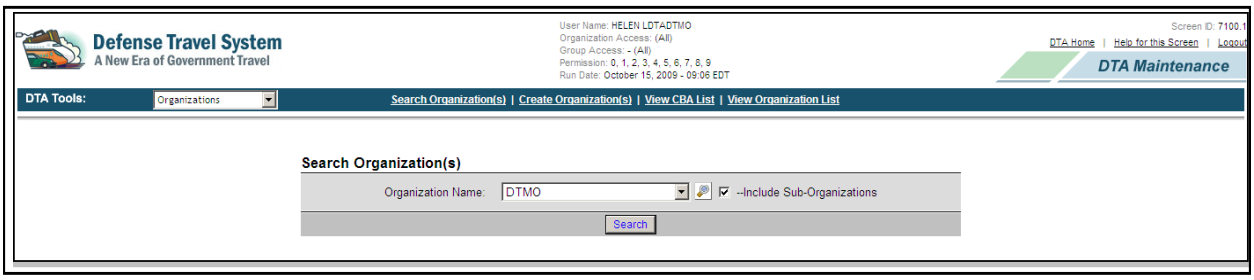

Figure L-2: Search Organization(s) Screen

2. Select the **Organization Name** drop-down list arrow and choose the correct **organization**.

3. Check the **Include Sub-Organizations** box.

4. Select **Search**.

The Organization(s) (Search Results) screen opens (Figure L-3).

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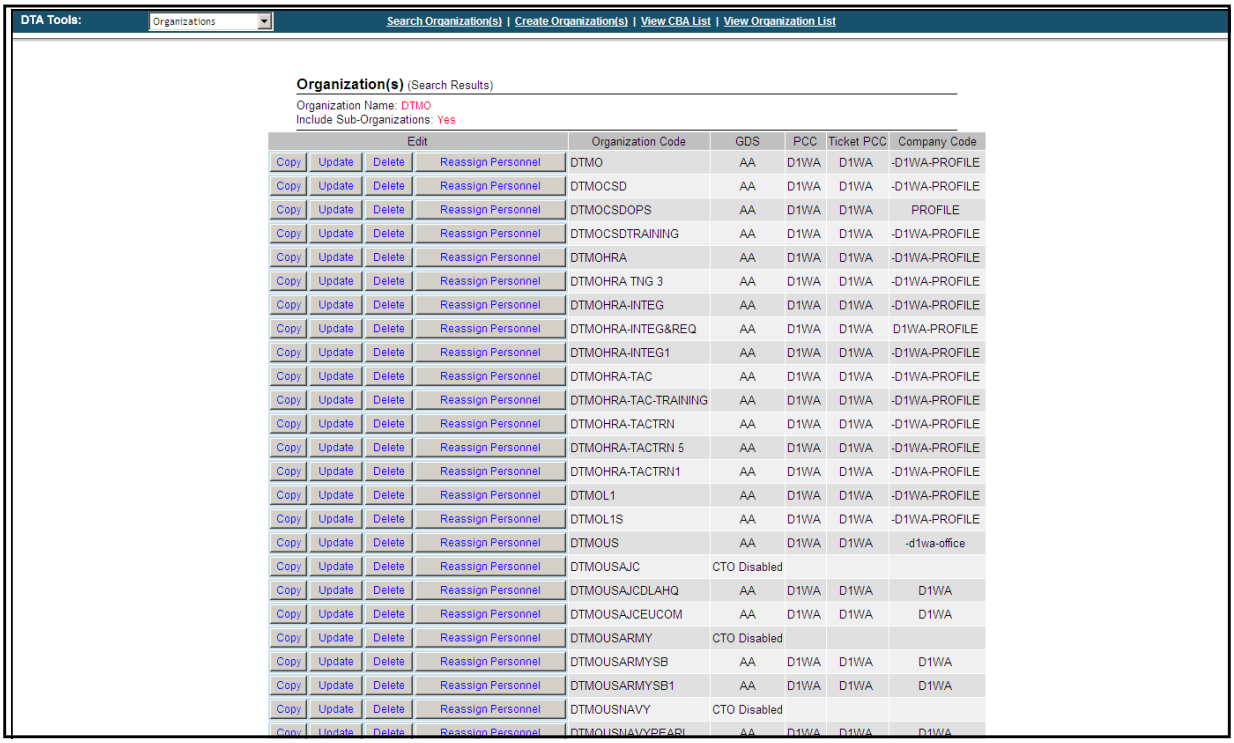

Edit				Organization Code	GDS	PCC	Ticket PCC	Company Code
Copy	Update	Delete	Reassign Personnel	DTMO	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOCSD	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOCSDOPS	AA	D1WA	D1WA	PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOCSDTRAINING	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA TNG 3	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-INTEG	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-INTEG&REQ	AA	D1WA	D1WA	D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-INTEG1	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-TAC	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-TAC-TRAINING	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-TACTRN	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-TACTRN 5	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOHRA-TACTRN1	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOL1	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOL1S	AA	D1WA	D1WA	-D1WA-PROFILE
Copy	Update	Delete	Reassign Personnel	DTMOUS	AA	D1WA	D1WA	-d1wa-office
Copy	Update	Delete	Reassign Personnel	DTMOUSAJC	CTO Disabled			
Copy	Update	Delete	Reassign Personnel	DTMOUSAJCDLAHQ	AA	D1WA	D1WA	D1WA
Copy	Update	Delete	Reassign Personnel	DTMOUSAJCEUCOM	AA	D1WA	D1WA	D1WA
Copy	Update	Delete	Reassign Personnel	DTMOUSARMY	CTO Disabled			
Copy	Update	Delete	Reassign Personnel	DTMOUSARMYSB	AA	D1WA	D1WA	D1WA
Copy	Update	Delete	Reassign Personnel	DTMOUSARMYSB1	AA	D1WA	D1WA	D1WA
Copy	Update	Delete	Reassign Personnel	DTMOUSNAVY	CTO Disabled			
Copy	Update	Delete	Reassign Personnel	DTMOUSNAVYPEABI	AA	D1WA	D1WA	D1WA

Figure L-3: Organization(s) (Search Results) Screen

Note: For large scale reorganizations, the DTA can request a list of the organization structure and organization data by submitting a ticket to the TAC.

L.2.1.2 Copy an Organization and Save it as a New Organization

A name must be identified for the new organization being created before the former organization can be copied. Starting on the DTA Maintenance Tool Home page, use the below steps to copy an organization and save it as a new organization:

1. Select the **DTA Tools** drop-down list arrow and select **Organizations**.

The Search Organizations screen opens (Figure L-2).

2. Select the **Organization Name** drop-down list arrow and choose the **organization** to copy. To see a list that includes all suborganizations owned by the selected organization, check the **Include Sub-Organizations** box.

3. Select **Search**.

The Organization(s) (Search Results) screen opens (Figure L-3). A list of organizations displayed, suborganizations will be included if requested in the search.

4. Select **Copy** next to the name of the organization to be copied.

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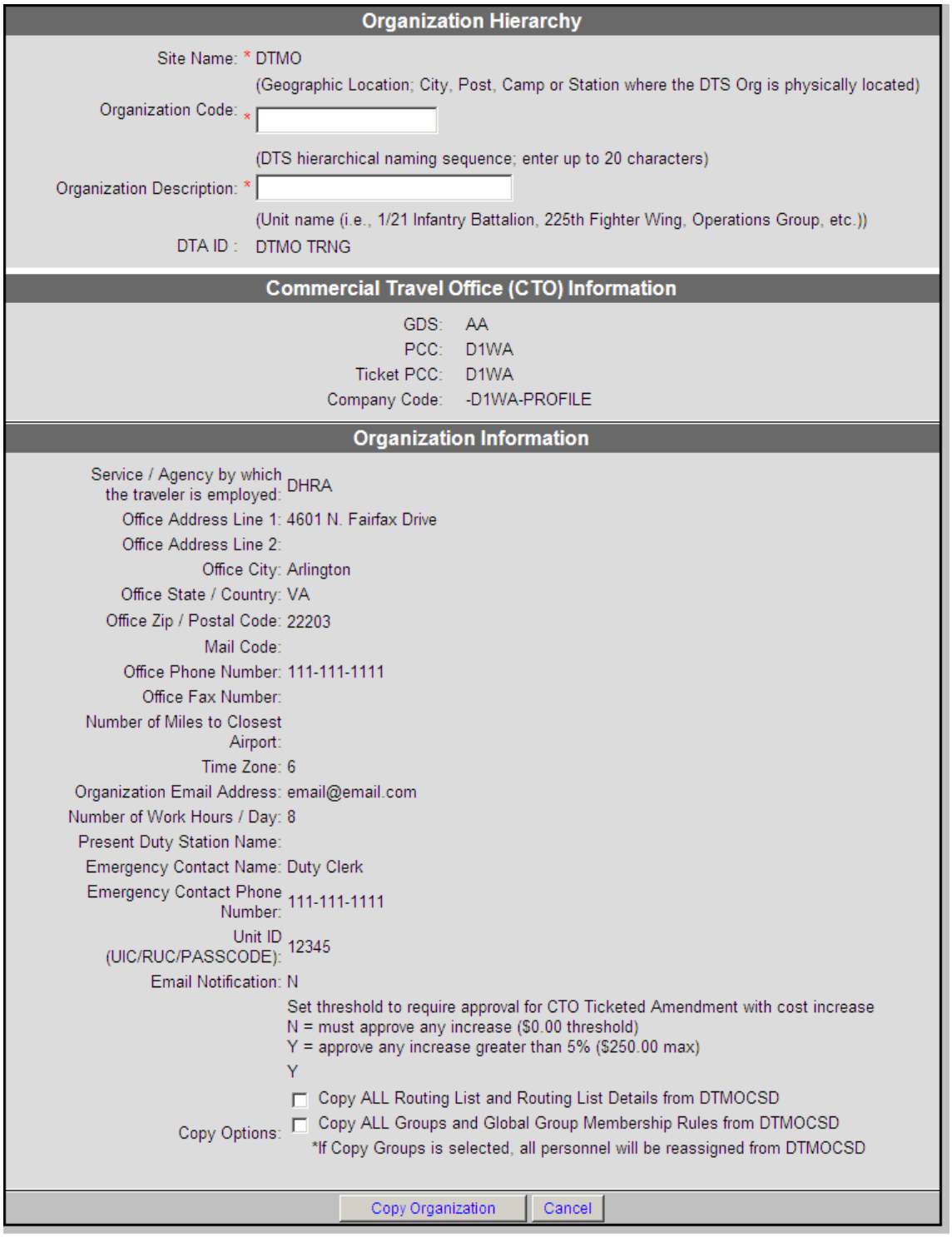
The Organization screen opens (Figure L-4). The three sections of organization data (Organization Hierarchy, Commercial Travel Office (CTO) Information, and Organization Information) are displayed in the view mode. This information will be copied and saved into the new organization.



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 DTMOCSD
Copy ALL Groups and Global Group Membership Rules from DTMOCSD
*If Copy Groups is selected, all personnel will be reassigned from DTMOCSD

Copy Organization | Cancel

Figure L-4: Organization Screen

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5. Complete the **DTS Organization Code** field with the new organization naming sequence.

6. Complete the **DTS Organization Description** field with the common unit name of the new organization.

7. Check the **Copy Options** box(es) to include other parts of the administrative organization structure, if necessary. (See Optional Steps A and B for more information.)

8. Select **Copy Organization.**
   -OR-
   Select **Cancel** to return to the Search Results screen without copying the organization.

L.2.1.3 Optional Step A: Copy Routing List(s)

If **Copy ALL Routing List and Routing List Details from (organization name)** was checked on the Copy Organization screen, all routing lists and details (document type, document status, signature name, level, and process name) within those lists are copied (Figure L-5). The information will be saved to the new organization.

If this box is unchecked, the original organization default routing list name is created for the new organization. This is used as the default routing list name for all newly assigned personnel to the new organization.

Note: If the individual routing list details require changes, use the Update Routing List feature to add or remove individual details in a single routing list *(DTA Manual*, Section 5.6.2). If the changes involve more than one routing list, consider using Global Routing List Maintenance to add or remove a common step or replace one routing official (RO) with another (*DTA Manual*, Section 5.7).

L.2.1.4 Optional Step B: Copy Group(s) and GGMR(s)

If **Copy ALL Groups and Global Group Membership Rules from (organization name)** was checked on the Copy Organization screen, the group structure and GGMR are copied to the new organization. It is not possible to select individual structures if this box is checked.

Users with organization access will have their access updated to the new organization when this option is selected. The below information is carried over with the personnel when this option is selected:

- Access to a higher-level organization (if applicable)
- Permissions
- Group access
- Default routing list in the profile
- User-specific data
- General traveler data.

The default LOA is blank. See Step 5.

Note: Profile validation will trigger for each traveler when their next document is created.

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Note: It is recommended that Optional Step B be used in most cases. If the personnel will eventually be reassigned, this can occur after Step 3, Copy Organization using Mass Reassignment. If not used, all the groups associated to the new organization must be created. Also, the GGMR(s) for the organization must be manually re-entered. For more information, see the following sections of the *DTA Manual*:

- Section 6.2.2 for group structure
- Section 6.3.3 to add new groups
- Section 6.3.5.2 to add GGMRs.

Note: The new organization GGMR must be updated manually in DTA Maintenance Tool if any new rules are required for the group created in the new organization. Remove the rule referencing the former organization group name.

L.2.2 Step 2. Update GGMR

Optional Step B establishes the new organization(s) group structure. This includes new group name(s) and GGMR(s) for the new organization(s). The group names in the former organization have been copied and saved in the new organization if Optional Step B was used. The new organization GGMR(s) for the new group(s) created in the new organization must be manually updated using the DTA Maintenance Tool.

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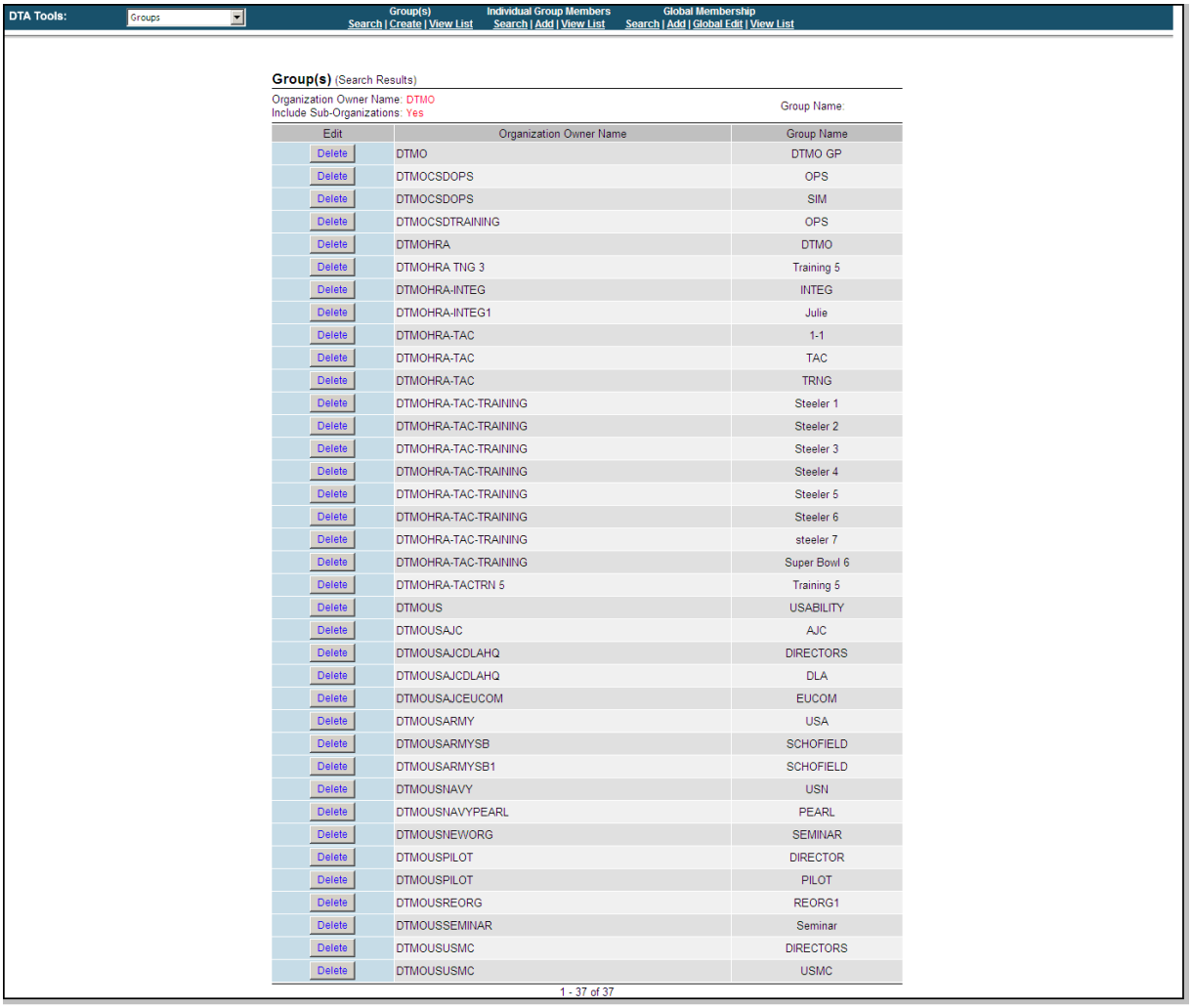
L.2.2.1 Determine Existing Group Structure

The DTA needs to confirm the group structure of the existing organization by requesting a list of groups. The DTA should perform a group search of the existing organization and its suborganizations. (*DTA Manual*, Section 6.3.1). The list of groups displays (Figure L-5).



Edit	Organization Owner Name	Group Name
Delete	DTMO	DTMO GP
Delete	DTMOCSDOPS	OPS
Delete	DTMOCSDOPS	SIM
Delete	DTMOCSDTRAINING	OPS
Delete	DTMOHRA	DTMO
Delete	DTMOHRA TNG 3	Training 5
Delete	DTMOHRA-INTEG	INTEG
Delete	DTMOHRA-INTEG1	Julie
Delete	DTMOHRA-TAC	1-1
Delete	DTMOHRA-TAC	TAC
Delete	DTMOHRA-TAC	TRNG
Delete	DTMOHRA-TAC-TRAINING	Steeler 1
Delete	DTMOHRA-TAC-TRAINING	Steeler 2
Delete	DTMOHRA-TAC-TRAINING	Steeler 3
Delete	DTMOHRA-TAC-TRAINING	Steeler 4
Delete	DTMOHRA-TAC-TRAINING	Steeler 5
Delete	DTMOHRA-TAC-TRAINING	Steeler 6
Delete	DTMOHRA-TAC-TRAINING	steeler 7
Delete	DTMOHRA-TAC-TRAINING	Super Bowl 6
Delete	DTMOHRA-TACTRN 5	Training 5
Delete	DTMOUS	USABILITY
Delete	DTMOUSAJC	AJC
Delete	DTMOUSAJCDLAHQ	DIRECTORS
Delete	DTMOUSAJCDLAHQ	DLA
Delete	DTMOUSAJCEUCOM	EUCOM
Delete	DTMOUSARMY	USA
Delete	DTMOUSARMYSB	SCHOFIELD
Delete	DTMOUSARMYSB1	SCHOFIELD
Delete	DTMOUSNAVY	USN
Delete	DTMOUSNAVYPEARL	PEARL
Delete	DTMOUSNEWORG	SEMINAR
Delete	DTMOUSPILOT	DIRECTOR
Delete	DTMOUSPILOT	PILOT
Delete	DTMOUSREORG	REORG1
Delete	DTMOUSSEMINAR	Seminar
Delete	DTMOUSUSMC	DIRECTORS
Delete	DTMOUSUSMC	USMC

Figure L-5: Group(s) Search Results Screen

Note: For large reorganizations, the DTA can request a list of groups and GGMR via a TAC ticket.

L.2.2.2 Update GGMR for the New Organization

It is important to review the new organization's GGMR to ensure that the appropriate group name(s) and Group Organization Owner Name(s) are used. This does not always happen when the organization is copied (*DTA Manual*, Section 6.3.5.2).

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L.2.3 Step 3. Reassign Personnel To Multiple Organizations

Reassignment of personnel allows a DTA to reassign a large number of personnel from an organization to other organizations. Based on organization access, the DTA may select up to five organizations to which personnel may be reassigned.

Beginning on the DTA Maintenance Tool home page, use the below steps for a mass reassignment of personnel:

1. Select the **DTA Tools** drop-down list arrow and select **Organizations**.

The Search Organizations screen opens (Figure L-2).

2. Select the **Organization Name** drop-down list arrow and choose the **organization** from which personnel will be reassigned.

3. Select **Search**.

The Organization(s) (Search Results) screen opens (Figure L-3).

4. Select **Reassign Personnel**.

The Search Organization(s) screen displays the organizations that may be selected as destination organizations (Figure L-6).

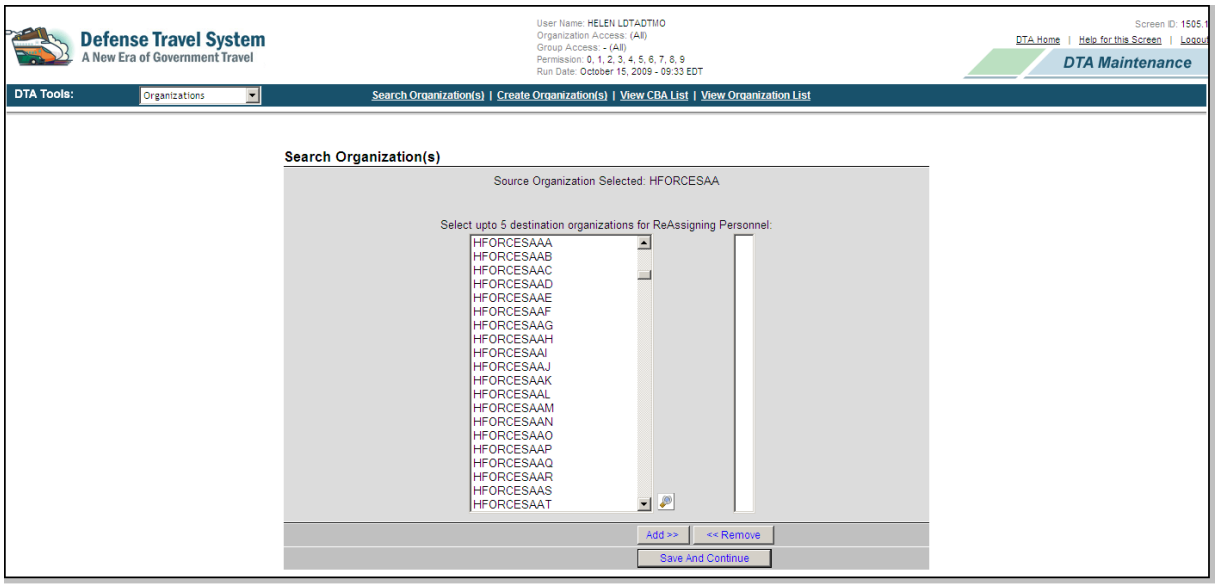

Figure L-6: Search Organization(s) Screen: Destination Organizations

No more than five organizations may be selected from the left column to be identified as destination organizations in the right column. If travelers are to be reassigned from the current organization to more than five organizations, the process maybe repeated as necessary.

5. Select an **organization** from the left column.

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6. Select **Add >>** to display the selected organization in the right column. Select **<< Remove** to delete organizations from the right column. Steps 3 and 4 may be repeated for up to five destination organizations.

7. Select **Save And Continue**.

The Reassign People screen opens.

The organization(s) selected on the Select Organization(s) screen are the column headers for the boxes used to select an organization for each person. The current organization of assignment is selected. It may be necessary to scroll through multiple screens for an organization that contains a large number of travelers.

8. Select the **organization** for reassignment for each name on the screen. The links at the bottom of each column can be used to select or deselect all travelers.

9. Select **Save and Refresh Page.**

The below occurs in DTS during reassignment:

- *LOA*. The default LOA is removed from the user's personal profiles when personnel are reassigned.
- *Permission levels.* The user's permission levels remain.
- *User data*. Both general traveler data and user-specific data remain.
- *GGMRs*. Travelers who are added to an organization with a GGMR will be members of the group using the new organization's GGMR. They will be removed from the former organization's GGMR.
- *Routing lists.* If a user reassigns personnel without copying the routing lists, the personnel will be associated with the new organization's default routing list. The default routing list can be changed to any other routing list associated with the new organization.

Note: Profile validation will trigger the next time each traveler enters DTS.

*Steps 1 through 3 should be repeated for **each new organization** before proceeding to Step 4.*

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L.2.4 Step 4. Cascade Organization Data Changes From Former Organization to Suborganizations and Personnel

The organization information in a user's personal profile (e.g., duty address) is not updated during reassignment. The DTA can use the Cascade Update options to update data in personal profiles and suborganizations. This applies to the organization information only. This feature does not apply to the organization hierarchy or to the CTO information.

L.2.4.1 Cascade Organization Data With Updates

When data is updated for an organization, the same data can be updated for all personnel in the organization and for all suborganizations at the same time. To accomplish this mass update, the user must check one of the Update Option boxes at the bottom of the Update Organization screen (Figure L-7). Only organizational data that is changed or updated will cascade.

Beginning on the DTA Maintenance Tool home page, use the below steps to update organization data:

1. Select the **DTA Tools** drop-down list arrow and select **Organizations**.

The Search Organizations screen opens (Figure L-2).

2. Select the **Organization Name** drop-down list arrow and select the **organization** from which the data will cascade down to the other organizations.

3. Select **Search**.

The Organization(s) (Search Results) screen opens (Figure L-3).

4. Select **Update** next to the name of the organization to be updated.

The Update Organization screen opens (Figure L-7).

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Update Organization * Data Required

Organization Hierarchy

Organization Code: DTMOCSDTRAINING

(DTS hierarchical naming sequence; enter up to 20 characters)

DTA ID : * DTMO TRNG - lerae.carsona@dtmo.pentagon.mil

(Email address for system generated emails - Rejects, etc)

Self Registration Data

Site Name: * DTMO

(Geographic Location; City, Post, Camp or Station where the DTS Org is physically located)

Organization Description: * Training Branch

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

Organization Email Address: * helpdesk123@dtmo.pentagon.mil

Email Notification: On Off

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: * Defense Human Resources Activity

Office Address Line 1: * 4601 N. Fairfax Drive

Office Address Line 2:

Office City: * Arlington

Office State / Country: * VA Lookup

Office Zip / Postal Code: * 22203

Mail Code:

Office Phone Number: * 111-111-1111

Office Fax Number:

Number of Miles to Closest Airport:

Time Zone: * GMT-5:00 (Eastern Standard Time)

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): * 12344

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)

* N

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

Save Changes Cancel

Figure L-7: Update Organization Screen

5. Update fields with organizational data that will be copied to all suborganizations.

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6. Check the **Save these changes to ALL Personnel under (organization name)** box to save the changes to profiles of personnel assigned to the named organization.
   -OR-
   Check the **Save these changes to ALL Sub Organizations of (including personnel) (organization name)** box to save the changes to all the suborganizations. This will also save the changes to the profiles of the personnel assigned to the named organization's sub-organizations.
   -OR-
   Check **both** boxes to save changes to all the organizations and suborganizations and to all the profiles of all personnel assigned.

Note: Data elements not changed will not update in the profiles.

L.2.4.2 Cascade Organization Data With No Updates

If the data for the top-level organization does not change, but information must cascade to update data for personnel and suborganizations, the DTA can use the cascade function in the following way:

- Delete the data in the cascading fields
- Use the function again to update the data properly

For example, if the office address at the top-level organization does not change, but the information needs to be updated in the suborganizations, the DTA can accomplish this by using the below steps:

1. Delete the office address in the top-level organization.

2. Check the **Save these changes to ALL Sub Organizations of (organization)** box.

3. Select **Save Changes**.

This process deletes the address data from the lower-level organizations.

4. Re-enter the office address in the top-level organization.

5. Check the **Save these changes to ALL Sub Organizations of (organization)** box.

6. Select **Save Changes**.

This process populates the unchanged data from the top-level organization to all of the lower-level organizations.

L.2.5 Step 5. Create LOAs

This section explains how to create and update LOAs in travelers' profiles during reorganization.

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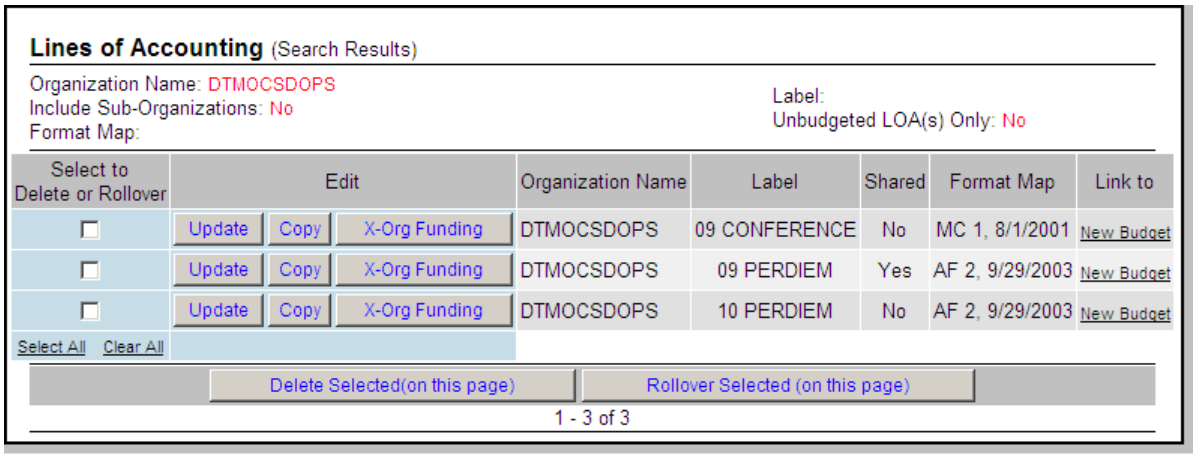
L.2.5.1 Determine Current LOA Structure

Search existing LOAs to display the current LOAs for the organization (*DTA Manual*, Section 8.3.2). Beginning on the Search Lines of Accounting screen, use the below steps to view the current LOA structure:

1. Select the **Organization Name** drop-down list arrow and select the existing organization name.

2. Check the **Include suborganizations** box.

The Lines of Accounting (Search Results) screen opens (Figure L-8).



Lines of Accounting (Search Results)

Organization Name: DTMOCSDOPS
Include Sub-Organizations: No
Format Map:

Label:
Unbudgeted LOA(s) Only: No

Select to Delete or Rollover	Edit			Organization Name	Label	Shared	Format Map	Link to
☐	Update	Copy	X-Org Funding	DTMOCSDOPS	09 CONFERENCE	No	MC 1, 8/1/2001	New Budget
☐	Update	Copy	X-Org Funding	DTMOCSDOPS	09 PERDIEM	Yes	AF 2, 9/29/2003	New Budget
☐	Update	Copy	X-Org Funding	DTMOCSDOPS	10 PERDIEM	No	AF 2, 9/29/2003	New Budget

Select All Clear All

Delete Selected(on this page) | Rollover Selected (on this page)

1 - 3 of 3

Figure L-8: Lines of Accounting Search Results Screen

3. Select **Update** to view details of each LOA.

Note: For large-scale reorganizations, the DTA can request a list of Lines of Accounting by submitting a TAC ticket.

L.2.5.2 Copy Existing LOAs

Beginning on the Line of Accounting (Search Results) screen, use the below steps to copy existing LOAs to the new organization:

1. Select **Copy** for desired LOA(s) (*DTA Manual*, Section 8.3.6).

The Copy Line of Accounting screen opens (Figure L-9).

2. Select the **Organization Name** drop-down list arrow and select the organization to which the LOA will be copied.

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3. Update all necessary portions of the newly copied LOA.

Copy Line of Accounting (An empty budget shell will not be created if Create Budget is not checked.) * Data Required

Format Map: MC 1, 8/1/2001
Organization Name: * DTMOCSDOPS
Share LOA: ☐ Yes
Create Budget: ☑ Yes
Empty Budget Shell Fiscal Year: * (4 digit year)

Label

LOA Fiscal Year: * 09 (2 digit year)
LOA Name: * CONFERENCE

LOA Data Elements

Account 1	AAA or DTST: *	067400	(6 or DTST)
	DTST Sub-field:		(14)
Account 2	DEPT:		(2)
	FY:	09	(2)
	PY:	09	(2)
	APPR:	1106	(4)
	SH:	27A0	(4)
Account 3	OC/SOC:	2100	(4)
	BCN:	67415	(5)
	SA:		(1)
Account 4	AAA:	067500	(6)
	TTC:	2E	(2)
Account 5	CC:	16AB17088000	(12)
	MAC:	M20175	(6)
Account 6	FA:	52	(2)
	WC:	00	(2)
	FC:	BF	(2)
	CAC:	0001	(4)
	BRC:		(2)
Account 7	RON:		(15)
	RBC:		(1)
Account 8	JNLU:		(4)
	DSSN:	9400	(4)
	ACRN:	AA	(2)
Account 9	IBOP:		(4)
Account 10	TF:		(2)
	LOC:		(2)
	FCN:		(3)
	FLN:		(3)

Save Copied Line of Accounting | Cancel

Figure L-9: Copy Line of Accounting Screen

4. Select **Save Copied Line of Accounting**.

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If a new LOA is needed for the new organization, see DTA Manual, Chapter 8.

L.2.6 Step 6. Update Default LOA

Use the Update Default LOA link to assign, remove, or change a default LOA on all personal profiles within an organization at one time. This link is useful for updating the profiles after a reorganization.

Before updating a default LOA, the DTA must ensure that the new default LOA has been created in DTS.

Beginning on the DTA Maintenance Tool home page, use the following steps to assign a default LOA to all users in an organization:

1. Select **Lines of Accounting** from the drop-down list.
2. Select **Update Default LOA(s)** on the subnavigation bar.

The Default LOA Update screen opens (Figure L-10). See Table L-2 for a description of the Default LOA Update screen.

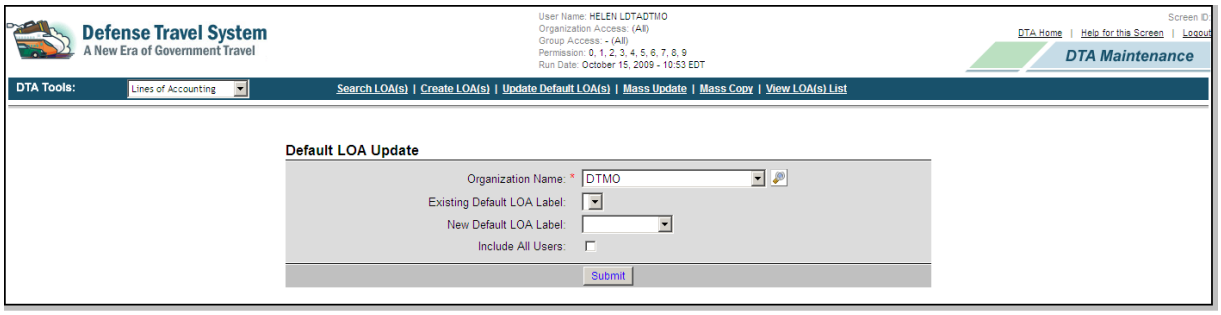

Figure L-10: Default LOA Update

Table L-2: Default LOA Update Screen Descriptions

DEFAULT LOA UPDATE SCREEN DESCRIPTIONS	
FIELD NAME	**DESCRIPTION**
Organization Name	Drop-down list of organizations. The organizations available are limited to organizations in the user's hierarchical setup.
Existing Default LOA Label	Drop-down list of existing LOAs currently assigned as default LOAs.
New Default LOA Label	Drop-down list of LOAs that exist in the organization. The organizations available are limited to organizations in the user's hierarchical setup.

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Table L-2: Default LOA Update Screen Descriptions

DEFAULT LOA UPDATE SCREEN DESCRIPTIONS	
FIELD NAME	**DESCRIPTION**
Include All Existing Default LOA(s)	Check box, that when checked, displays all travelers in the organization. DTS will display all travelers with any default LOA. Leaving the check box clear will display only those travelers with the default LOA entered in the **Existing Default LOA Label** field.

3. Select the **Organization Name** drop-down list and choose the **organization** to which the default LOA will be assigned.

4. Select the **Existing Default LOA Label** drop-down list and select the default LOA that currently populates the personnel profiles for the selected organization.

Note: The first item in the **Existing Default LOA Label** drop-down list is a blank line that can be used to search for travelers who have no default LOA in their profiles.

5. Select the **New Default LOA Label** drop-down list and select the new **default LOA label** to be used in the organization (Figure L-11).

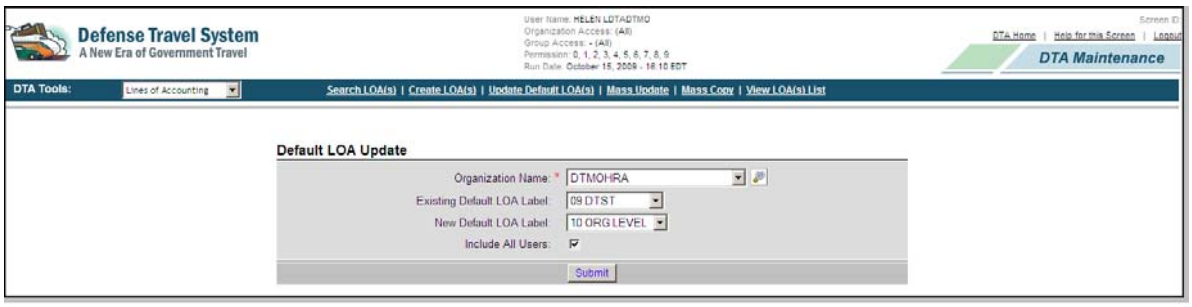

Figure L-11: Default LOA Update Screen

6. Check the **Include All Users** box to display all travelers in the organization no matter what they have as their existing default LOA.
   -OR-
   Leave the box blank to display only those travelers with the default LOA specified in the **Existing Default LOA Label** field.

7. Select **Search**.

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The Default LOA Update Person (Search Results) screen opens (Figure L-12). The search results display an alphabetical list of travelers in the organization. The **Select to Include in Update** boxes are all selected to be assigned to the selected default LOA.

Default LOA Update Person (Search Results)

Select to Include in Update	Organization Name	Name	SSN	Existing Default LOA Label	New Default LOA Label
☑	DTMOHRA	HODGE, CHRIS A	XXXXX6522		10 ORG LEVEL
☑	DTMOHRA	HODGE, ERIC T	XXXXX6523		10 ORG LEVEL
☑	DTMOHRA	HODGE, HELEN D	XXXXX6521		10 ORG LEVEL
☑	DTMOHRA	HODGE, HELEN D	XXXXX6521A		10 ORG LEVEL
☑	DTMOHRA	HODGE, ERIC T	XXXXX6523A		10 ORG LEVEL
☑	DTMOHRA	Traveler, Reserve	XXXXX3333R		10 ORG LEVEL
☑	DTMOHRA	DTMOHRA1, ERIC T	XXXXX6420	07 Training	10 ORG LEVEL
☑	DTMOHRA	Dtmohra1, Chris	XXXXX1002	07 Training	10 ORG LEVEL
☑	DTMOHRA	Dtmohra1, Eric T	XXXXX1001	07 Training	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA10, CHRIS A	XXXXX6420	07 Training	10 ORG LEVEL
☑	DTMOHRA	Dtmohra10, Eric T	XXXXX6420	07 Training	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA10, HELEN D	XXXXX6420	07 Training	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA4, Eric T	XXXXX6420	07 Training	10 ORG LEVEL
☑	DTMOHRA	VirginiaA, Eric T	XXXXX8495	08 DTST	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA1, Chris A	XXXXX6420	09 DTST	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, HELEN D	XXXXX6420	09 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, ERIC T	XXXXX6420	09 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, CHRIS A	XXXXX6420	09 ORG LEVEL	10 ORG LEVEL

Select All Clear All

Submit Cancel

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Figure L-12: Default LOA Update Person Search Results Screen

8. Select **Submit** to display a list of the new LOA assigned to the travelers.

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The Default LOA Update Person Search Results screen opens with the Existing Default LOA Label populated with the new Default LOA Label for each of the selected personnel (Figure L-13).

Default LOA Update Person (Search Results)

Select to Include in Update	Organization Name	Name	SSN	Existing Default LOA Label	New Default LOA Label
☑	DTMOHRA	DTMOHRA1, Chris A	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA1, ERIC T	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	Dtmohra1, Eric T	XXXXX1001	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	Dtmohra1, Chris	XXXXX1002	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA10, CHRIS A	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	Dtmohra10, Eric T	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA10, HELEN D	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, HELEN D	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, ERIC T	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA3, CHRIS A	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	DTMOHRA4, Eric T	XXXXX6420	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	HODGE, CHRIS A	XXXXX6522	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	HODGE, HELEN D	XXXXX6521	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	HODGE, HELEN D	XXXXX6521A	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	HODGE, ERIC T	XXXXX6523A	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	HODGE, ERIC T	XXXXX6523	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	Traveler, Reserve	XXXXX3333R	10 ORG LEVEL	10 ORG LEVEL
☑	DTMOHRA	VirginiaA, Eric T	XXXXX8495	10 ORG LEVEL	10 ORG LEVEL

Select All Clear All

Submit Cancel

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Figure L-13: Default LOA Update Person Search Results Screen

9. Deselect any travelers who should not be assigned the new default LOA.

10. Select **Submit** to assign the New Default LOA Label to all listed travelers.

Repeat the process for an organization that has different groups of personnel that will use different LOAs.

L.2.7 Step 7. Modify Budget Shell

As each LOA is copied or created, a corresponding budget shell is created. The DTA should ensure that targets are entered for each new budget shell (*DTA Manual*, Section 9.3.1.1).

L.2.8 Step 8. Delete Former Organization Structures

This section explains the way in which to delete the structures of the former organization.

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L.2.8.1 Delete the Administrative Structure of the Former Organization

After all new organization administrative structures have been copied or created; the former structures should be deleted. If the former organization will be used by some personnel, the deleting procedure is modified. Administrative structures still in use (e.g., organizations, routing lists, groups, GGMR) should not be deleted. They should be updated.

Use the below steps to delete the former organization's administrative structure:

1. Ensure that all personnel are reassigned or detached from the former organization.

Note: For more information on these topics, see Section L.2.3 Step 5. Reassign Personnel to Multiple Organizations. See *DTA Manual*, Section 7.3.3 to detach a person from an organization.

2. Delete LOAs. (*DTA Manual*, Section 8.3.3.)

3. Remove groups and GGMRs. Complete the following steps:

   a) Remove all personnel from the group (*DTA Manual*, Section 6.3.5.2). If the original GGMRs were setup properly, the group membership lists should be empty of all members added automatically.

   b) Remove each GGMR. Remove each entry individually (*DTA Manual*, Section 6.3.2).

4. Delete the budget items individually (*DTA Manual*, Section 9.3.1.2).

5. Delete each routing list individually.

Note: Do not delete the former routing list until all existing documents have processed. Once the routing list is deleted, any documents still routing must be adjusted to reflect the new routing list.

Note: There is no feature to facilitate deleting all the routing lists in an organization or its sub-organizations.

6. Delete organizations one at a time (*DTA Manual*, Section 4.4.1.3).

L.2.8.2 Modifications for Reorganizations Involving Cross-Organization Activity

A case may arise in which a DTA is conducting a reorganization that is pulling an outside organization into their organization access. This may occur when the organization is assuming responsibility for an existing organization that is external to the organization. The procedure is similar except for personnel reassignment.

The DTA for the former organization must detach the personnel from the former organization. The DTA for the new organization will receive the personnel into the new organization. The DTA for the former organization must delete the former organization structure.

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L.3 Travel Documents That Are In Process During the Reorganization

After the traveler is reassigned, all new documents will process in the new organization structure. Documents that are in process at the time of the traveler's reassignment will process consistent with the former organization routing list and LOA in the document. Routing will be accomplished with the former organization routing list based on the SSN of each RO, regardless of the RO's new organization of assignment.

Once a document is created, the organization of assignment is embedded in the document for consistency and to enforce organization control of accounting and reporting. This cannot be changed. The routing list in the traveler's profile is displayed based on the current organization of assignment. If it is changed after reassignment to a new organization, routing will stop. The only way to reverse the change is to reassign the traveler to the former organization and select the correct routing list.

Do not delete the former organization routing lists until all documents have completed routing and they are no longer needed. Once deleted, any documents that use them will not route.

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