



Information Paper:

DTS Organization Profile Change Information Chart

Background

If your Component goes through a realignment, you may need to transform your DTS organization structure. **Note:** See the [DTA Manual, Appendix Q](#) for DTS organization-naming conventions. Reorganization for DTS is a 3-part process: Phase 1 - Planning, Phase 2 - Building Structure and Moving Profiles, and Phase 3 – Closeout. There are specific steps to accomplish for a successful transition. In this information paper, we only address the options to establish a new org and impact on traveler profiles. For the complete reorganization process, review the [DTA Manual, Appendix L](#) and follow your Component’s business rules.

Note: This information paper is for Site Level DTAs who are familiar with the processes for building and maintaining DTS organizations and traveler profiles.

Getting Started

During initial site setup and maintenance thereof, the **DTA Maintenance Tool (MT)** is the means to view, create and update organization structure (Orgs, Routing Lists, Groups, GGMRs, and LOAs) in DTS (Figure 1). You will use the **MT** to achieve the majority of reorg actions. **Note:** DTS budgets are setup separately using the **Budget Tool**, which this paper does not address.

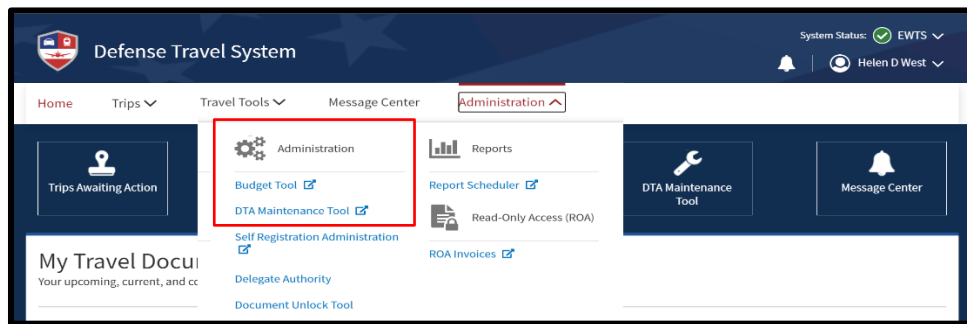


Figure 1: Administration Screen

There are a couple of options for establishing the new org and modifying profiles (Figure 2). Depending upon which option you use, determines additional follow on actions.

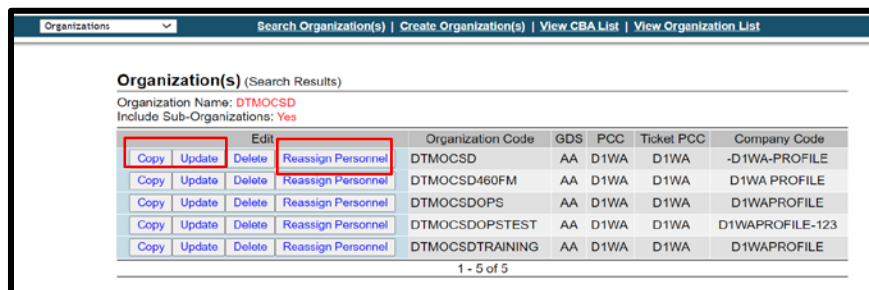


Figure 2: Organization (Search Results) Screen



Getting Started (continued)

For the new org, you must determine who will fulfill the system roles (e.g., DTAs, AOs, CBA Specialist). After establishing the org, grant permissions and specialized access within the traveler profiles for designated roles. Remove permissions and access from profiles which no longer require a specialized system role. **Note:** Follow your local business rules for role assignment and termination process.

Information Chart

The chart shows organization methods and the different profile fields that you may need to change (Table 1).

Table 1

Organization Change Profile Information Chart			
Traveler Profile Fields	If You Copy An Existing Org to Create a New Org	If You use the Reassign Personnel Button in the Org	If You Update Profile and Reassign to a New Org (within the profile)
Permission levels	Remain the same.	Remain the same.	Remain the same.
Org Access to assigned Org	Changes to new assigned Org.	Blank. Must select as appropriate.	Does NOT change. Remains old organization access.
Org Access to any org other than assigned Org	Remains the same.	Blank. Must select as appropriate.	Does NOT change. Remains old organization access.
Group Access to group owned by assigned org	Changes to new org; has same group name. See Note 1	Blank. Must select as appropriate.	Does NOT change. Remains old group access.
Group Access to group owned by any org other than assigned org	Remains the same.	Blank. Must select as appropriate.	Does NOT change. Remains old group access.
Default Routing List	Remains the same. See Note 2	Changes to new organization.	Blank. Must select as appropriate.
Default LOA	Blank. See Note 3	Blank. See Note 3	Blank. Must select as appropriate.
Special Features (Self-AO, NDEA, etc.)	Remain the same.	Remain the same.	Remain the same.
Personal Data	If you select the option to copy to the new org, remains the same.	Remains the same.	Remains the same.
Organization Data	If you select the option to copy personnel to the new org, remains the same. See Note 4	Remains the same (that of the old org). See Note 4	Remains the same (that of the old org).



**Information
Chart
(continued)**

Note 1: If you use the **Copy** option and check the second box (Figure 3), the current org's group names (same old group name) duplicate into the new org. All Global Group Membership Rules (GGMRs) duplicate into the new org. Select **Copy Organization** to modify the record. **Note:** If the new org's GGMRs don't automatically link to the new groups, manually update the rules. See the [DTA Manual, Appendix L](#).

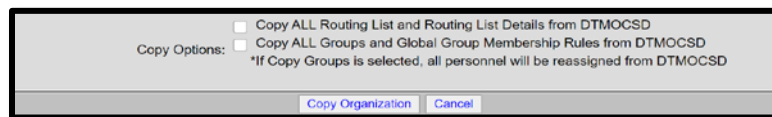


Figure 3: Copy Organization Screen

Note 2: If you use the **Copy** option and check the first box (Figure 3), then the routing lists, and the routing list details duplicate into the new org. Select **Copy Organization** to modify the record. **Note:** If you did not select the RL option, then manually add the routing details. See the [DTA Manual, Chapter 5](#).

Note 3: If you use the **Reassign Personnel** option to move the people, update the profile (People table) and select **Update Default LOA** to assign a LOA. **Note:** You can change org specific details (e.g., duty address) in the individual traveler profile. Select **Save Person** to modify the record. See the [DTA Manual, Appendix L](#).

Note 4: When using the **Copy** option to make a new org, the org details don't change. If you **Reassign Personnel**, the org details within the profile don't change. To change multiple org's details (e.g., duty address, etc.) select **Update**. At the bottom of the page, determine which **Update Options** (Figure 4) boxes to check: Save these changes to ALL Personnel under [Org Name] and/or Save these changes to ALL Sub Organizations of [Org Name]. Once you're finished, select **Save Changes** to modify the record.

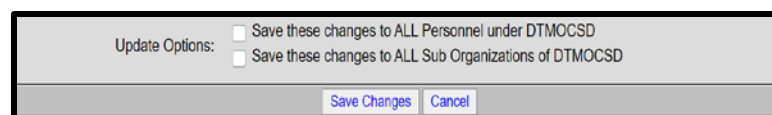


Figure 4: Update Organization Screen

Reports

Once the reorg setup is finalized, it is a good idea to run reports to verify data accuracy in the **MT**. A few essential lists include:

- **View Organization**
- **View Routing List**
- **View Person (Basic and Special Features)**
- **View LOAs**

For more information on DTS Reports, see the [DTA Manual, Chapter 10](#).