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

OLD ORG                  NEW ORG

SECOND FLEET                         SEVENTH FLEET

DN6008961
CCSG 10

DN600896155771A
DET A

DN600896155771B
DET B

DN600896155771C
DET C

DN600896155881
ESG 2

DN600896155882
ESG 3

DN700896655771
CCSG 10

DN700896655771A
DET A

DN700896655771B
DET B

DN700896655771C
DET C

DN700896655772
CCSG 11

DN700896655772A
DET A

DN700896655772B
DET B

DN700896655881
ESG 5

DN700896655881A
DET A

DN700896655881B
DET B

DN700896655881C
DET C
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)

<table>
<thead>
<tr>
<th>Organization Name: HTSPAWAR</th>
<th>Organization Code</th>
<th>GDS</th>
<th>PCC</th>
<th>Ticket PCC</th>
<th>Company Code</th>
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Method - Copy Organization (continued)

### Organization Hierarchy

<table>
<thead>
<tr>
<th>Site Name:</th>
<th>DTMO</th>
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</thead>
<tbody>
<tr>
<td>Location:</td>
<td>City, Post, Camp or Station where the DTS Org is physically located</td>
</tr>
<tr>
<td>Code:</td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>(DTS hierarchical naming sequence; enter up to 20 characters)</td>
</tr>
<tr>
<td>Company:</td>
<td>DTMO TRNG</td>
</tr>
</tbody>
</table>

### 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 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
- **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)

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

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

Check these options as desired

- Save these changes to ALL Personnel under HTSPAWAR
- Save these changes to ALL Sub Organizations of HTSPAWAR
Resource – DTS Organization Change Profile Information Chart

- Information paper available that describes effect on permissions when profiles are moved, re-assigned or copied

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