Defense Travel System

DTA Manual, Appendix L: Reorganizations

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1 Reorganization Overview

When your senior management changes your organization structure, you may find it necessary to change your DTS organization set-up as well. Even without such a change, other circumstances – for example, an organization name change or a mass reassignment of personnel – may lead you to consider a DTS reorganization. Whatever the reason you need to reorganize your DTS structure, the contents of this Appendix will help.

1.1 A Warning about Travel Documents

Before you begin your DTS reorganization, all travelers with active travel documents must fully complete them to voucher approval while they still belong to their old organizations. If you move a traveler with active travel documents to a new organization, the Authorizing Official cannot stamp the voucher APPROVED.

2 The Eight Steps to Reorganization

The steps listed below show one route to a successfully executing a reorganization in DTS. Other orders are possible. These steps also appear in a flowchart in Figure L-1. The rest of this appendix is dedicated to explaining the steps in detail.

1. Create the new organizations. If you create a new organization by copying an old one, DTS offers you two options:
   • Option A – Copy the organization’s routing lists to the new organization.
   • Option B – Copy the organizations groups, global group membership rules (GGMRs), and personnel to the new organization.

2. Validate or update the GGMRs in each new organization.

3. If any personnel are in the organization, reassign them to their proper organization.

4. Make any necessary changes to each organization and if needed, copy those changes to its subordinate organizations and assigned personnel.

5. Create Lines of Accounting [LOAs] for each new organization.

6. Update the default LOA for each new organization.

7. Add budget targets to the budgets for each new organization.

8. Delete any structures of the former organization you no longer need.
**Note:** Only DTAs who have access to the organization a traveler was in when they created a DTS travel document will be able to pull reports that include that document. Therefore, to be able to run reports that include travel document in their old organization, a DTA must:

1. Run the reports **BEFORE** they move to their new organization. –OR–
2. Keep (or be given) access to their old organization (or to an organization hierarchically above both their new organization and the old organization). –OR–
3. Create a second DTS user profile that is granted access to the old organization.

**Note:** You can find out more information about any of these steps in various DTA Manual chapters. For instance, see DTA Manual, Chapter 4 for more information about copying organizations. See section 6 of this Appendix for a complete list of DTA Manual chapters and appendices, with links to each.
3 Outside Entity Executes Reorganization

If your planned organization structure will be part of a hierarchy that you don’t currently have organization access to, you can’t use the DTA Maintenance Tool to execute the reorganization. In such cases, you must contact a higher-level DTA, your Component’s DTS office, the DTMO, or the TAC for advice or help.

Even in such cases, however, you must still understand the 8 steps listed and shown above, as you will may be required to assist those who will help you execute the reorganization.

4 DTA Executes Reorganization

If the reorganization occurs completely within the hierarchy that you have access to, you can use the DTA Maintenance Tool to execute the reorganization. However, if you lose that access at any time – say you join a lower level organization, with associated loss of organization access – someone else must take over for you. Each step in the process is summarized below. Again, for more information about any of the steps in this process, see the pertinent DTA Manual chapter (a full list of chapters and links to them is at the end of this appendix).

4.1 Create New Organizations

Before you begin creating your new organizations, you should familiarize yourself with your current organization structure. You should also consider mapping out the new organization by deciding which organizations you should copy to create the organizations you need, and which you’ll have to create from scratch.

To display all your current organizations, in the DTA Maintenance Tool’s Organizations module, execute a search with your main organization as the Organization Name and check the Include Sub-Orgnizations box (see Figure L-2) before you hit Search. The search results (Figure L-3) will contain all the organizations you can access.

![Figure L-2: Search for All Organizations You Can Access](image-url)
Note: If you have a very large organization hierarchy, you can request a full list of organizations and their data by submitting a help ticket to the Travel Assistance Center (TAC).

If you will create a new organization from scratch:
1. Select the **Create Organization(s)** link on the dark blue navigation bar.
2. On the organization profile screen, enter all required information and select **Save Organization**.

The new organization will have a default routing list (unpopulated), but no LOAs, groups, assigned personnel, etc. You must add those yourself.

If you will create a new organization by copying an existing one:
1. Select **Copy** next to the source organization on the Organization(s) (Search Results) screen (Figure L-3).
2. On the organization profile screen, enter all the required information.
3. Decide whether you want to take advantage of the two options at the bottom of the screen. They may save you time later in the process. You can see these options in Figure L-4. They are explained more fully in sections 4.1.1 and 4.1.2.
4. Select **Save Organization**.

The new organization may have additional routing lists (and all routing lists fully populated), and it may also have populated groups, active GGMRs, and assigned personnel, if you took advantage of one or both of the options shown and described below.
4.1.1 (Optional) Copy Routing Lists and Routing List Details

If you choose to Copy ALL Routing List and Routing List Details from <organization> (see Figure L-4), DTS copies all of the source organization’s routing lists to the new organization, and they arrive fully populated with routing elements. You can update those routing lists as needed for use by the new organization’s travelers.

If you do not check this box, DTS only creates a default routing list, which contains no routing elements, for the new organization. You must populate that routing list before a traveler may use it. You must also create and populate any additional routing lists that the organization requires.

4.1.2 (Optional) Copy Groups and GGMRs and Reassign Personnel

If you chose to Copy ALL Groups and Global Group Membership Rules from <Organization> (see Figure L-4), DTS copies all of the source organization’s groups and GGMRs to the new organization. Selecting the box will also reassign all of the source organization’s personnel to the new organization. You cannot select individual groups or GGMRs to copy, or specific personnel to reassign if you select this box; it’s an “all or nothing” decision.

Note: There are two important considerations before you check this box:

1. Although DTS creates new GGMRs that reflect the name of the new owning organization, it does not change the name of the organization that owns the destination group. So if the source organization currently owns a GGMR that puts its travelers into a group that the source organization owns (a very common occurrence), the new GGMR continues to put the travelers into a group owned by the source organization. For example: DA12345 has a GGMR that puts all its travelers into a group called EVERYONE, which DA12345 owns. When you copy that organization to DA98765 with this checkbox selected, DTS creates the organization DA98765, as well as a GGMR that puts all travelers into the group called EVERYONE that DA12345 still owns.

2. If you are in the organization you copy, when DTS moves the personnel to the new organization, it moves you as well. If you had organization access to the source organization, DTS updates your organization access to the new organization. Thus, you will be unable to continue working with the source organization’s assets, and you can’t move yourself back to the source organization without assistance from another DTA. This is not an issue if you have organization access to a higher-level organization – see below.
Personnel with organization access to the old organization who are reassigned in this way will retain their organization access, but updated so they have access to the new organization. Personnel moved in this way also retain their:

- Organization access to other organizations
- Permission levels
- Group Access
- Default routing list (either updated to the new organization’s default routing list or retained as is if they have an alternate one)
- All data in the User Specific Data area of their DTS profile
- All data in the General Traveler Data of their DTS profile

If you do not check this box, you must create any groups and GGMRs the new organization needs. Having a record of the old organization’s group structure can help you do that. To get one, from the DTA Maintenance Tool’s Groups module, search for all your groups. That is, enter you main organization as the Organization Owner Name and check Include Sub-O rganizations (Figure L-5). The result will be a list of all groups in your organization hierarchy (Figure L-6).

Figure L-5: Search Group(s) Screen

Figure L-6: Group(s) Search Results Screen
4.2 Update GGMRs

Review every new organization’s GGMRs to make sure all GGMRs are in place. For those that are in place, make sure they have the proper group and group organization owner names; this does not always happen when you copy organization – e.g., if the owning organization changed its name in the reorganization. If any GGMRs are missing, either because you created the organization from scratch or because you chose not to copy the GGMRs from a copied organization, create new ones to fill the gaps.

4.3 Reassign Personnel

Check every organization to ensure the correct people belong to it. For example, if you copied an organization and chose to copy the groups, all personnel in the source organization moved to the new organization. But maybe some of them were supposed to go to a different organization. In this step, you will make that right by moving from organization to organization, looking for and moving any personnel who are in the wrong place.

To reassign personnel, begin by selecting Reassign Personnel on the Organization(s) (Search Results) screen (Figure L-3), then select up to five destination organizations (Figure L-7).

After you select Save and Continue, you’ll be able to select which organization each person will belong to (Figure L-8). Select Save and Refresh to reassign the personnel to the selected organization. If you have more than five destination organizations, you must go through this process more than once.
When you reassign personnel, DTS:

- Removes their default LOA.
- Retains their permission levels.
- Retains all the information in the General Traveler Data and the User Specific Data sections of their personal profiles.
- Adjusts their group membership according to GGMRs – adding them to the new organization’s groups and removing them from the old organization’s groups if both organizations have GGMRs in place.
- If you did not copy their old organization's routing lists, their default routing list will be change to the new organization’s default routing list.

You can update any of this information after the reassignment is complete, if needed.

### 4.4 Organization Changes Applied through the Hierarchy

The organization information in a person’s personal profile does not change when they join a new organization. Likewise, you can’t change most organization information when you copy an organization. You must change all of that information later.

To simplify such changes, you can use the **Update Changes** options (Figure L-9) at the bottom of the Update Organization screen. **Note:** Changes to the organization hierarchy or to TMC information are exempt from such updates.
4.4.1 Apply Main Organization Changes to Subordinates

When you check the **Save these changes to ALL Personnel under <organization>** box, all the information that appears in a DTS personal profile (e.g., the organization address and phone number) updates for all of the organizations personnel. In an organization with 100 travelers, this prevents you from having to update the organization address times.

When you check the **Save these changes to ALL Sub Organizations of <organization>** box, all the information that you changed updates for all the organizations under this one in the hierarchy. So if the entire hierarchy moved to a new street address, you only have to type it once to update it for all organizations.

**Note**: Only information that you changed in the source organization will update for its personnel and subordinate organizations. For example, if the organization changed street addresses but kept the old phone number, all of the organizations will retain their old phone numbers.

4.4.2 Update Subordinates without Updating Main Organization

If the data for an organization does not change, but you need to update the information for its subordinate organizations and/or personnel, you can still use the **Update Options** to lighten your workload.

Say for example, that a number of satellite offices are relocating to the main organization’s current address. You need to update the address for all the subordinate offices, but not the address of the main organization.

The simplest way to do that is to:

1. Update the main organization, deleting the data in all the fields that need to change for the subordinate organizations. Save that change without checking either **Update Options** box.

2. Update the main organization again to put the information back. Since this registers as a change, when you check either or both of the **Update Options** boxes, DTS updates the information for the personnel and/or subordinate organizations.

4.5 Create Lines of Accounting (LOAs)

Before any travelers assigned to the new organization can travel, you must create and fund the organization’s LOAs. This step, and the two that follow are all about how you will fund the new organization’s travel.
4.5.1 Determine Current LOA Structure

You’ll be a step ahead if you educate yourself about the LOAs your organizations currently use. The best way to do that is from the DTA Maintenance Tool’s **Lines of Accounting** module, search for all your LOAs by using your main organization as the **Organization Name** and check **Include Sub-Organizations** (Figure L-10). The result will be a list of all LOAs your organizations own (Figure L-11).

![Figure L-10: Search Lines of Accounting Screen](Image)

![Figure L-11: Lines of Accounting (Search Results) Screen](Image)

4.5.2 Create New LOAs

If you will create a new organization from scratch, in the Lines of Accounting module:

1. Select the **Create LOA(s)** link on the dark blue navigation bar.
2. On the Create Lines of Accounting screen, select a format map and select **Continue**.
3. After the screen refreshes, enter all required information and select **Save Line of Accounting**.

If you will create a new LOA by copying an existing one:
1. Select **Copy** next to the source LOA on the LOA(s) (Search Results) screen (Figure L-11).

2. On the Copy Line of Accounting screen, enter and update all the required information, then select **Save Copied Line of Accounting**.

Whichever way you create the new organization’s LOAs, even if you checked the box to create a new budget for the LOA (which we recommend), that new budget will have no funds in it. Before a traveler can use a LOA to fund travel, its associated budget must have funds. You’ll be adding funding targets to the new budgets at a later step in the reorganization process.

### 4.6 Update Default LOAs

After you create an organization’s default LOA, you must assign it as the default LOA in the travelers’ DTS profiles. For organizations that don’t have many travelers, you can easily update them one at a time in each traveler’s DTS profile. However, for organizations with a larger number of travelers, consider using a global update to change them all at once. Here’s how:

1. From the DTA Maintenance Tool’s **Lines of Accounting** module, select **Update Default LOA(s)** on the dark blue navigation bar. The Default LOA Update screen (Figure L-12) opens.

![Default LOA Update Screen](image)

*Figure L-12: Default LOA Update Screen*

2. Select the organization the travelers you want to update belong to, the default LOA you want to replace, the LOA you want to replace it with, and the travelers you want to include in the update, then select **Submit**. The Default LOA Update Person (Search Results) screen (Figure L-13) opens.
3. Check the box next to the travelers you want to include in the update and select Submit.

4.7 Modify Budget

As mentioned above, when you create a new LOA, you have the option (which we advise you to take advantage of) to create a new budget for that LOA. However, DTS always creates new budgets with no budget targets assigned. Go to the DTS Budget module, search for each new budget, and edit it to add the necessary budget targets. Until you add funding to the budget, travelers will not be able to use the LOA to fund travel.

4.8 Delete Old Organization Structures

When you have completed creating, populating, and funding the new organizations, delete the old organizations if you can. However, please understand that because DTS does not allow you to delete organizations with assets attached, and also does not allow you to delete some assets, you may not be able to fully delete the entire organization structure. See below for details.

4.8.1 Delete the Administrative Structure of the Former Organization

To delete the old organization’s structures:

1. Reassign or detach all personnel.

2. Delete all LOAs.

3. Remove all travelers from groups. Note: Those added via GGMR should already be gone; removed when you reassigned or attached them. However, you must still manually remove any that were manually added to the group.

4. Remove all groups and GGMRs.
5. Delete each budget. **Note:** DTS will not allow you to remove budgets that have been modified. Even if you only added funds to the budget but never used it to fund travel, you can’t delete it, meaning DTS will not be able to totally remove the organization either.

6. Delete all routing lists. **Note:** Do not delete a routing list until all documents using it have fully processed to archive. If you delete a routing list, documents still in routing can’t complete routing until someone adjusts or amends them to use an active routing list.

7. Delete those organizations you can delete. As noted in step 5, however, you can’t delete organizations with attached budgets.
4.8.2 Modification for Reorganizations Involving Cross-Organization Activity

When your reorganization assigns a (formerly) external organization into your hierarchy, your organization assumes responsibility for it. The reorganization procedure for such a move is similar to that described above. The primary exception is personnel reassignment.

Because you don’t have organization access to the old organization, that organization’s DTA must detach its personnel. You can then receive those personnel into their new organizations.

5 Travel Documents In Process During Reorganization

After a traveler is reassigned, all new documents will process using the new organization’s routing lists and LOAs.

Documents that were in process before the traveler’s reassignment will continue to route with the routing list and LOA listed on the document. Because DTS identifies Routing Officials by SSN, the system can continue routing documents to them regardless of the organization they now belong to.

However, if the traveler changes organizations after routing has begun, the traveler’s new default routing list takes over, and the document stops routing. When this happens, you must reassign the traveler back to their former organization and re-select the original routing list.

For this reason, you should not reassign any travelers while routing is in process. Also, you should not delete any routing lists until all documents using it have completed routing and are no longer needed.
# 6 The DTA Manual: Contents & Links

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