

CHAPTER 6: GROUPS

In the Defense Travel System (DTS), a group is an electronic list of travelers' names. The DTS 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:

6.1 Groups in DTS	6-1
6.1.1 Main Group.....	6-2
6.1.2 Other Groups.....	6-2
6.2 Planning for Groups	6-3
6.2.1 Group Structure Example.....	6-4
6.2.2 Group Structure Summary	6-5
6.3 Groups	6-10
6.3.1 Search for Group(s).....	6-11
6.3.2 Delete Groups	6-11
6.3.3 Create Groups.....	6-12
6.3.4 View Group Structure List	6-13
6.3.5 Search, Remove, Add, and View Group Members: Manual Method	6-14
6.3.5.1 Search for Group Members.....	6-14
6.3.5.2 Remove Members From a Group Manually	6-15
6.3.5.3 Add Members to a Group	6-16
6.3.5.3.1 Add Members by SSN	6-17
6.3.5.3.2 Add Members by Name	6-16
6.3.5.4 View Group Member List.....	6-17
6.3.6 Search, Remove, Add, and View Group Members Using GGMR: Automatic Method	6-18
6.3.6.1 Search for GGMRs	6-18
6.3.6.1.1 Remove Group Members Using GGMR	6-19
6.3.6.2 Add a GGMR	6-19
6.3.6.3 Global Edit	6-20
6.3.6.4 View Global Group Membership List	6-22

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.

The Lead DTA (LDTA) should ensure that each traveler is a member of at least one group. Travelers may belong to more than one group. Being a member of a group does not grant the traveler any additional privileges.

Unlike organizations, groups are non-hierarchical. Although 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, 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 orga-

Chapter 6: Groups

nizations need a group to facilitate data maintenance, document preparation, and help desk support. They also use this information to determine the number of groups an organization may need.

DTAs maintain the group membership for those organizations to which they have access. 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 other officials to allow any-time 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 its 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 that each traveler is a member of at least 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. Such users include Service or Agency

DTAs, unit clerks, Centrally Billed Account (CBA) Specialists, CBA-DTAs, Transportation Officers (TOs), all Routing Officials (ROs), 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 Organizational 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 trav-

eler 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.

First, the DTA should assess the current process for accessing travel documents and establish similar access to documents in DTS. See Table 6-1.

Table 6-1: Document Access Model Comparison

DOCUMENT ACCESS MODEL COMPARISON		
	PAPER-BASED	DEFENSE TRAVEL SYSTEM
Document Routing	Each RO receives the paper travel documents, completes the appropriate action, and routes to the next RO.	DTS uses an electronic routing list to advance travel documents automatically from one RO to the next. Once the action has been completed, it will not appear in the RO's queue.
Document History	Paper copies are retained at local commands for the prescribed time for historical purposes.	DTS accommodates the ability to access the document history by creating groups and granting group access. The site should determine who will need anytime access to documents for each organization.
<p>Note: ROs who normally maintain paper copies of travel documents, and still have a reason to in DTS, may be given anytime group access to travel documents.</p>		

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 anytime access to travelers' documents. An example of an organizational chart is shown in Figure 6-1. The triangle in the lower right corner of the rectangles denotes the organization and suborganizations that have such individuals who require anytime access to travelers' documents.

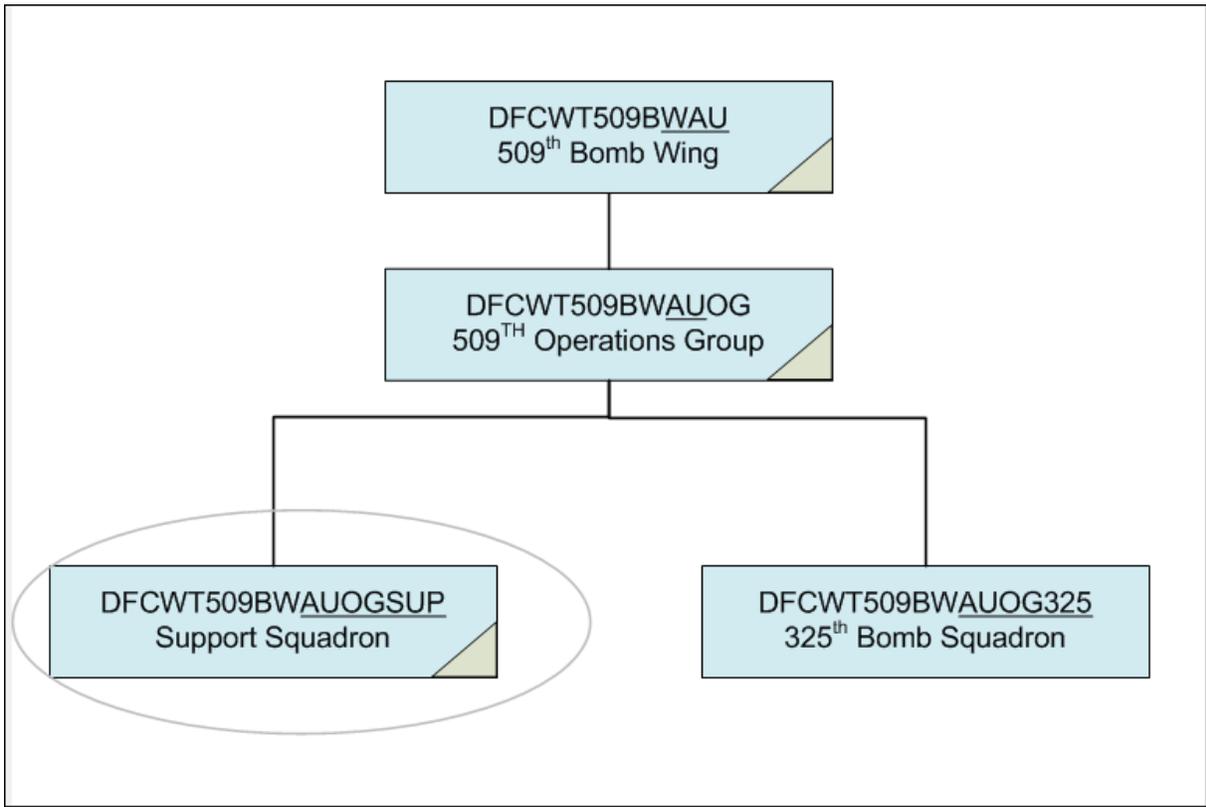


Figure 6-1: Example of Organization Structure for 509th Bomb Wing

Start at the lowest-level organization (DFCWT509BWAUOGSUP) and read up the organization chart. In the example, DFCWT509BWAUOGSUP has a clerk who maintains traveler data and creates documents. This organization needs a group. The group will be named based on the Group Organization Owner Name (the name of the organization for which the group is being created).

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 (DFCWT509BWAUOG) also has a clerk and a DTA who support the AUOGSUP and AUOG325 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.

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 6-2 through Table 6-6 illustrates the group structure worksheets for the four service branches and DoD agencies.

Table 6-2: 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
DA7244 Main Org	Main	LDTA, Help Desk						
DA6244SS Special Staff	SStaff	ODTA S-1	DA6244	Main	DA6244SS	SStaff		
DA6244OPS Ops HQ	OPS	ODTA, Admin Clerk	DA6244	Main	DA6244OPS	OPS		
DA6244OPSFLT Ops Flight Det.	OPSF	ODTA Admin Clerk	DA6244	Main	DA6244OPS	OPS	DA6244OPSFLT	OPSF
DA6244OPSSPT Ops Support Det.	OPSS	ODTA, AO Admin Clerk	DA6244	Main	DA6244OPS	OPS	DA6244OPSSPT	OPSS
DA6244BASE Base Hq. Det.	BASE1	ODTA, AO1 Admin Clerk	DA6244	Main	DA6244BASE	BASE1		
DA6244BASE Base Hq. Det.	BASE2	ODTA, AO2 Admin Clerk	DA6244	Main	DA6244BASE	BASE2		

Chapter 6: Groups

Table 6-3: 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 6-4: 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

Chapter 6: Groups

Table 6-5: 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		
DFCEJO28BWSSCPTS	CPTS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS S	SStaff	DFCEJO28BWSSCPTS	CPTS
DFCEJ028BWSG	SG	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG		
DFCEJO28BWSGCC	CC	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGCC	CC
DFCEJO28BWSGSVS	SVS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGSVS	SVS
DFCEJO28BWSGMSS	MSS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGMSS	MSS
DFCEJO28BWSGCES	CES	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGCES	CES
DFCEJO28BWSGSFS	SFS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGSFS	SFS
DFCEJO28BWSGCS	CS	ODTA, Admin Clerk	DFCEJ	EAFB	DFCEJ028BWS G	SG	DFCEJO28BWSGCS	CS

Table 6-6: 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
DD19RICGACK F	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 organization's DTA uses the DTA Maintenance Tool to update, remove, and create groups.

The DTA can create and update groups for the organizations to which they have access. This access is based on their organization's hierarchical setup within DTS. The Search Groups and Create Groups screens limit choices in the drop-down lists, 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 topic has a link to tasks, 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

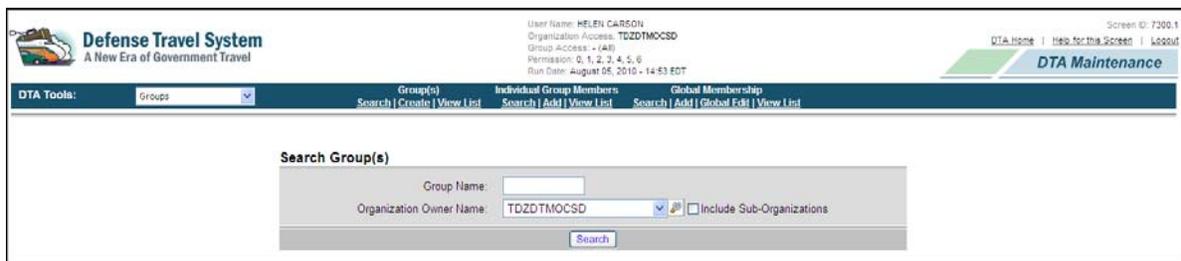


Figure 6-3: Search Group(s) Screen

DTAs may use any of the groups that they can view in the DTA Maintenance Tool, and perform these 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 must first search for the group(s) in DTS. Follow the below steps to search for groups in DTS:

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 returns more results.

The organization to which the DTA has access displays as the default in the Organization Owner Name drop-down list. All organizations in the hierarchical setup will display in the drop-down list, if selected.

3. Select the **Organization Owner Name** drop-down list and select an organization in which to search for the group.

Selecting one of the suborganizations from the drop-down list limits the search to that suborganization only. DTAs can expand the range of organizations searched by checking the **Include Sub-Organizations** box.

4. Select **Search**.

The list of group names 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 of the tasks 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 from DTS 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 being 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 from the group and may be reassigned to another group in DTS.

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.

Chapter 6: Groups

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.
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. It displays the remaining groups for the selected organization (Figure 6-4).

The screenshot shows the 'Defense Travel System' interface with a navigation bar and search results. The search results are for the organization 'TDZDTMOCSD' and list three groups: DTMO-CSB, DTMO-KMB, and KMB. Each group has a 'Delete' button next to it.

Edit	Organization Owner Name	Group Name
Delete	TDZDTMOCSD	DTMO-CSB
Delete	TDZDTMOCSD	DTMO-KMB
Delete	TDZDTMOCSD	KMB

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

6.3.3 Create Groups

DTAs can create groups based on the DTA's organization setup and access in DTS. When creating groups, DTAs first create an "empty shell" to which they will assign members. 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 in DTS.
4. Select the **Organization Owner Name** drop-down list and select the organization where this group will belong.
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 to which the DTA has access display in the list.

Chapter 6: Groups

4. Select the **Include Sub-Organizations** box to include suborganizations 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 a .csv file (Excel spreadsheet).

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 links for 'Group(s) Search | Create | View List', 'Individual Group Members Search | Add | View List', and 'Global Membership Search | Add | Global Edit | View List'. The main form area is titled 'Search Individual Group Member(s)' and includes a 'Required' indicator. The form fields are: 'Organization Owner Name' (dropdown menu with 'TDZDTMOCSD' selected), 'Group Name' (dropdown menu with 'Select One ...' selected), 'Member SSN' (text input), 'Member Last Name' (text input), 'Member First Name' (text input), and 'Include group members added through Global Group Membership' (checkbox). A 'Search' button is located at the bottom of the form.

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

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

Only the organizations to which the DTA has access are available in the list.

3. Select the **Group Name** drop-down list and select the group in which 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 the names of users who 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).

The screenshot shows the 'Individual Group Member(s) (Search Results)' screen in the Defense Travel System. The page header includes the DTS logo and user information for HELEN CARSON. The main content area displays a table of search results for the group 'K11B'. The table has five columns: 'Edit', 'Member Name', 'Member SSN', 'Member Organization', and 'Add Method'. There are four rows of data, each with a 'Remove' button in the 'Edit' column. The 'Add Method' for all members is 'Manual'. Below the table, it indicates '1 - 4 of 4' results.

Edit	Member Name	Member SSN	Member Organization	Add Method
Remove	CARSON, CHRIS A	999962346	TDZDTMOCSD	Manual
Remove	CARSON, EMILY A	999962355	TDZDTMOCSD	Manual
Remove	CARSON, ERIC T	999962363	TDZDTMOCSD	Manual
Remove	Carson, Eric T	999962371	TDZDTMOCSD	Manual

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

2. Verify that the selected individual is the correct 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.

Chapter 6: Groups

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 DTAs to add members to groups. DTAs can add users to groups that are in the DTA's organization setup. The Group Name list displays only groups that are 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).

The screenshot shows the 'Add Individual Group Member' screen. At the top, there is a navigation bar with 'DTA Tools' and 'Groups' (with a dropdown arrow). Below this, there are three main sections: 'Group(s)' with 'Search | Create | View List', 'Individual Group Members' with 'Search | Add | View List', and 'Global Membership' with 'Search | Add | Global Edit | View List'. The main content area is titled 'Add Individual Group Member' and contains a form with the following fields: 'Organization Owner Name' (a dropdown menu with 'Select One...' and a required asterisk), 'Group Name' (a dropdown menu with a required asterisk and a note: 'You must select an option from the Organization Owner Name list.'), and 'Member SSN' (a text input field with a required asterisk). There are 'Search', 'Add Member', and 'Cancel' buttons at the bottom of the form. The top right corner shows 'User Name: HELEN CARSON', 'Organization Access: TDZDTMOCSD', 'Ontrip Address: - (44)', 'Permission: 0, 1, 2, 3, 4, 5, 6', 'Run Date: April 03, 2010 - 09:35 EDT', 'Screen ID: 7402', and 'DTA Home | Help for this Screen | Logout'.

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, the DTA may use the Search button to search DTS 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. Select the **Organization Name** drop-down list and select the organization in which 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. Select the **Organization Owner Name** drop-down list and select the organization. The DTA's organization access limits what organizations will be shown in the list.
-OR-
Select the **magnifying glass** icon to search for the organization.
4. Select the **Group Name** drop-down list and select the group.
5. Select **Run Report**.

Chapter 6: Groups

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

The Group Member List displays.

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

GGMR is the feature in DTS that DTAs may use to add and remove members automatically to a group. The rule specifies the group(s) to which all persons assigned to a specific organization are to be members. 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.

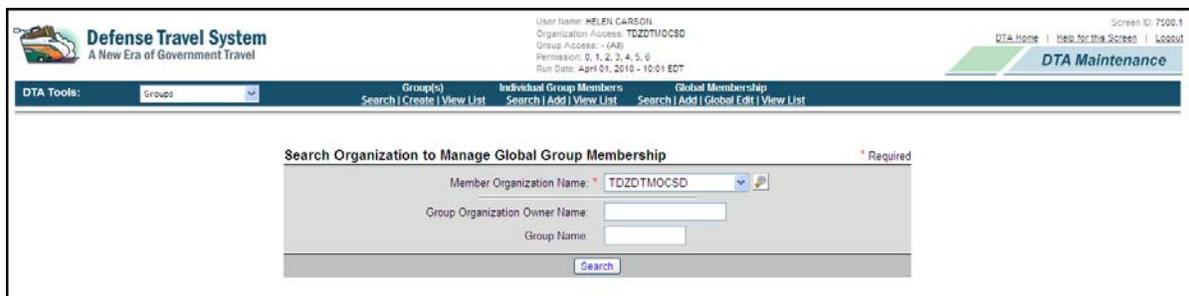
As persons are received into the organization, their names are added automatically to each of the organization's groups. Members added via GGMR are not removed from the group membership list automatically when reassigned to a different organization.

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, there is a navigation bar with 'DTA Tools' and a dropdown menu set to 'Groups'. Below this, there are three tabs: 'Group(s)', 'Individual Group Members', and 'Global Membership'. The 'Global Membership' tab is active, showing a search form. The form has three input fields: 'Member Organization Name' (a dropdown menu with 'TDZDTMOCSD' selected), 'Group Organization Owner Name' (a text box), and 'Group Name' (a text box). A 'Search' button is located at the bottom of the form. The page header includes the 'Defense Travel System' logo and the tagline 'A New Era of Government Travel'. On the right side of the header, there is user information: 'User Name: WLEB CARSON', 'Organization Access: TDZDTMOCSD', 'Group Access: - (All)', 'Permission: 0, 1, 2, 3, 4, 5, 6', and 'Run Date: April 04, 2010 - 10:01 EDT'. There are also links for 'DTA Home', 'Help for this Screen', and 'Logout', and a 'DTA Maintenance' button.

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 allows the DTA to establish and maintain an organization's group membership structure. It allows the DTA to establish a rule 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*.

Chapter 6: Groups

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

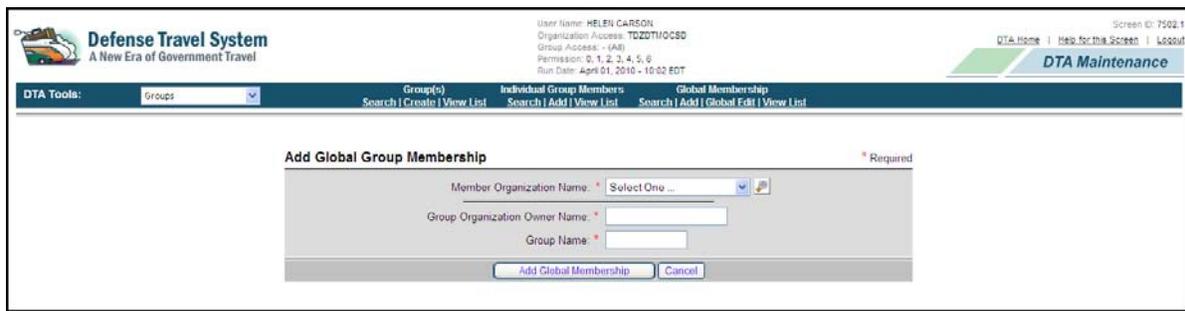


Figure 6-11: Add Global Group Membership Screen

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. Select the **Organization Name** drop-down list and choose the organization. DTAs organization access limits the organizations they will see in the list.
-OR-
Select the **magnifying glass** icon to search for the organization.
4. Select the **Include Sub-Organizations** box to include suborganizations 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).

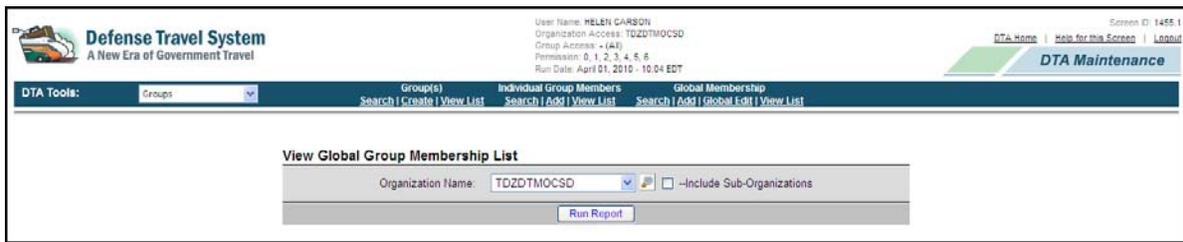


Figure 6-13: View Global Group Membership List Screen

3. Select the **Organization Name** drop-down list and select the organization. The DTA's organization access limits the organizations that display in the list.
-OR-
Select the **magnifying glass** icon to search the organization list.
4. Select the **Include Sub-organizations** box to include suborganizations in the report.
5. Select **Run Report**.

The DTA is prompted to download the report, which may be downloaded to the computer or viewed in a separate window as a .csv file (Excel spreadsheet).

The Global Group Membership List displays.

This page is left blank intentionally.