DTS Organization Profile Change Information Chart

Introduction

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 organization and impact on traveler profiles. For the complete reorganization process, review the *DTA Manual, Appendix L* and follow your Component's business rules.

*For this information paper, "you" refers to a Site Level DTA who is familiar with the processes for building and maintaining DTS organizations and traveler profiles.

Planning

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 reorganization actions. **Note**: DTS budgets are setup separately using the **Budget Tool**, which this paper does not address. For information on the **Budget Tool**, see the *DTA Manual, Chapter 9*.
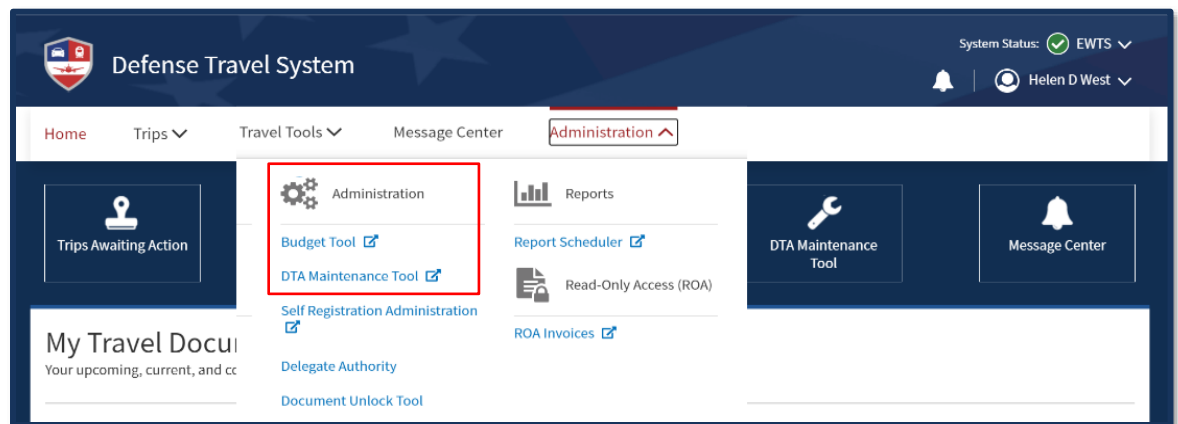

Figure 1: Administration Drop Down Menu – Options

Key action – it is important to verify the organization naming sequence with your Component before establishing the new organization in DTS. Once you have the name format, there are a couple of options for establishing the new organization and modifying profiles in the system. Depending upon which option you choose, determines the additional follow on actions.

- One option is to establish the new org in the **Organization** table and then use the **Reassign Personnel** option to move the people. *Note*: *This paper addresses this option in detail.* You can build the new organization using **Create Organization** *or* **Copy** an existing organization and then **Update** the unique information with the record. Once

Planning
(continued)

you have the new organization built, go back to the old org and move the profiles using the **Reassign Personnel** function to the new organization.

- Another option is to establish the new org in the **Organization** table. You can build the new organization using **Create Organization** *or* **Copy** an existing organization and then **Update** the unique information with the record. Once you establish the new org, go to the **People** table to detach (from the old org) and receive (into the new org) the profiles. *Note: In your profile, the organization access must be set at the level to allow you see both organizations*. For more about establishing organizations, as well as detaching and receiving profiles, see the *DTA Manual, Chapter 4* and *DTA Manual, Chapter 7*.

Key action – it is vital to determine who will fulfill the system roles (e.g., DTAs, AOs, CBA Specialist) for the new organization. Sometimes during a reorganization, not all the people move to the same organization or if they do move, they may no longer fulfill a specialized role. After building the organization and assigning the profiles to the new organization, you will need to grant permissions and specialized access within the traveler profiles for designated roles. **Note**: Be sure you follow your local business rules for role designation terminations and new role establishments.

Close out - As a DTA, you need determine if there are profiles which need to stay in the old organization for a while or be detached from the old organization permanently. The close out period may take a while if there are travelers on travel. It is best to wait to move profiles when someone is on a trip. After the voucher is paid, then you can move the person to their new organization or detach the profile. It is important to remove permissions and access from profiles which no longer require a specialized system role. **Note**: Follow your local business rules for role termination process.

Getting Started

When you are ready to establish the new organization in DTS, here is how to get started:

1. Select **Administration**, then select the **DTA Maintenance Tool.**

2. From the **DTA Maintenance Tool Home** screen, use the drop down menu to select **Organizations**.

3. The **Organization(s) Search Results** screen appears. The organization name you see is the highest organization access you have established in your profile. If the displayed item is not the organization you need to view, then check the box **Include Sub-Organizations** and select **Search** to view the entire organization listing in which you have access (Figure 2).
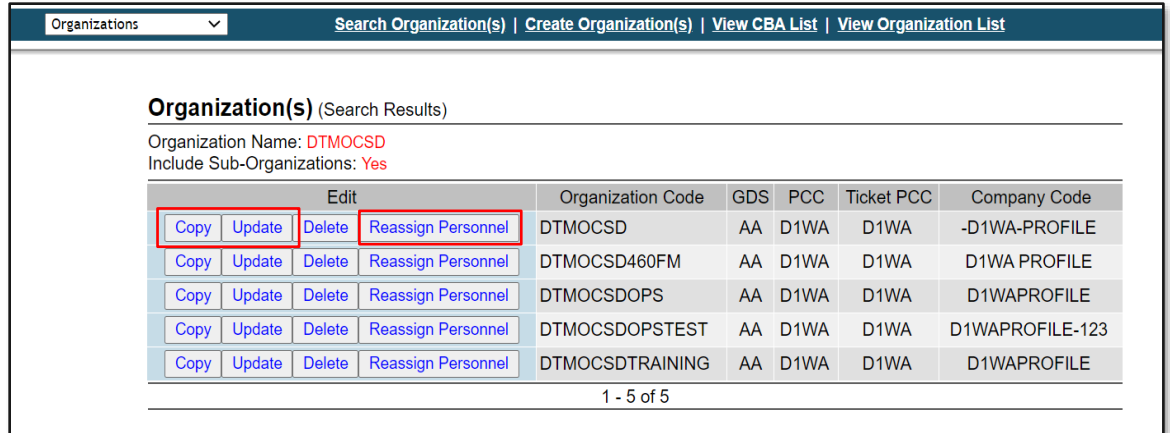

Getting Started

Figure 2: Organization (Search Results) Screen

4. Locate the organization or organizations which you will reorganize.

5. Review the chart listed in the next section (Table 1) to understand the results using the different organization methods and the impacts and actions for the profiles.

Information Chart

The chart shows the 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.

Information Chart *(continued)*

Organization Change Profile Information Chart			
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).

Note 1: On the **Organization(s) Search Results** screen, if you use the **Copy** option (Figure 2), the **Organization Hierarchy** screen opens. Enter the **Organization Code**, and **Organization Description**. At the bottom, is the **Copy Options**, check the second box (Figure 3), the current org's group names (same old group name) duplicate into the new org. All **Global Group**

Information Chart *(continued)*

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*.

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 3: Copy Organization Screen

Note 2: On the **Organization(s) Search Results** screen, if you use the **Copy** option (Figure 2), the **Organization Hierarchy** screen opens. Enter the **Organization Code**, and **Organization Description**. If you use the **Copy Options** 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 **Copy ALL Routing** option, then manually add the routing details in the MT, Routing List table. For more on routing lists, see the *DTA Manual, Chapter 5*.

Note 3: On the **Organization(s) Search Results** screen, if you use the **Reassign Personnel** option (Figure 2) to move the people. Once the profile is under the new org, update the profile (under the MT, People table) and select **Update Default LOA** to assign a LOA within each profile. **Note**: You can change organization 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: On the **Organization(s) Search Results** screen, when using the **Copy** option (Figure 2) to make a new organization, 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** next to the new organization. Once the **Update Organization** screen opens, 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.

| Update Options: | ☐ Save these changes to ALL Personnel under DTMOCSD |
| | ☐ Save these changes to ALL Sub Organizations of DTMOCSD |

Save Changes   Cancel

Figure 4: Update Organization Screen

Reports

Once the reorganization setup is finalized, it is good idea to run reports to verify the data accuracy in the MT. A few essential view listings include: **View Organization**, **View Routing List**, **View Person** (**Basic** and **Special Features**) and **View LOAs.**

For more information about DTS Reports, see the *DTA Manual, Chapter 10*.