Global Group Membership Rules

Introduction

As a Defense Travel Administrator (DTA), you use the **DTA Maintenance Tool (MT)** to manage groups for your DTS organizations. Part of managing groups is ensuring travelers are members of the required groups, so key personnel can provide essential DTS support. The easiest way of adding travelers to groups is the **Global Group Membership Rules (GGMRs)** method. This process allows you to identify all the organizations with groups that your travelers must be members, so the simultaneous establishment of multiple group memberships occur upon creating or receiving the traveler profile into your organization. In addition, if the traveler profiles already have assigned organizations and then you create the GGMRs, the process still works and travelers' group memberships populate immediately.

For this information paper, "you" refers to a Defense Travel Administrator (DTA); however, the role may be an ODTA, LDTA, Site, or Component level DTA.

Groups

Every DTS organization must have one group (to allow access to travelers' documents). This *primary* group in the organization contains all the travelers or group members and the GGMRs, so the DTAs and local help desk (with group access) can provide critical document processing support and trouble shoot issues. Some problems require support at different levels (e.g., Site, Component, and TAC) which is why travelers are members of multiple groups in DTS. **Note**: For group questions associated to higher-level DTS organizations, contact your Site or Component Level Representative.

There are three primary steps when forming groups:

- Create the **Group Name**
- Establish **Group Membership** lists
- Grant **Group Access** in a profile based upon the DTS role

Note 1: There are two ways to create group membership lists: the **Individual Group Members** (*manual*) method or **Global Group Membership Rules** (GGMRs) (*automatic*) process. This paper only addresses the GGMRs process. To learn more about groups, see the [DTA Manual, Chapter 6](#).

Note 2: Group access is only permissible to one group in DTS. Be sure to grant the correct group access to your personnel.

Note 3: Groups are associated to an organizataion, but they are not hiearchical.

Secondary Groups

As explained in the above section, each organization must have one group, with established GGMRs, and everyone assigned to the org is a member of that *primary* group. Typically, the Lead DTA or Site POC has access to the *primary* group to provide document support.

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Secondary Groups *(continued)*

DTS does allow for more than one group in an organization, but you should only create additional groups if there is a true need. For example, your organization has administrative staff who provide document support to only certain travelers, but not the entire org. In this case, you could form a *secondary* group with a limited number of members and allow a select number of people group access, but the membership setup is different. After you create the *secondary* group, do not establish GGMRs. Instead, *manually* add members under **Individual Group Members** option, then grant group access to the administrative staff.

Note 1: The administrative staff would be members of the *secondary* group and be granted group access.

Note 2: Individuals in the *secondary* group are also members in the *primary* group, so designated personnel (Lead DTA or local help desk) can provide document support.

Note 3: Individual Group Members are removed manually from the membership list.

To learn more about **Individual Group Members**, see the *DTA Manual, Chapter* 6.

Add a GGMR

Having **Global Group Membership Rules** (GGMRs) in place saves you time during in-processing when creating and receiving profiles in your organization. Once the rules are in place, they remain in place, unless you make changes to them. Here is how to create a GGMR:

1. Log into DTS. The DTS **Dashboard** appears. Under **Administration**, select the **DTA Maintenance Tool** (Figure 1).
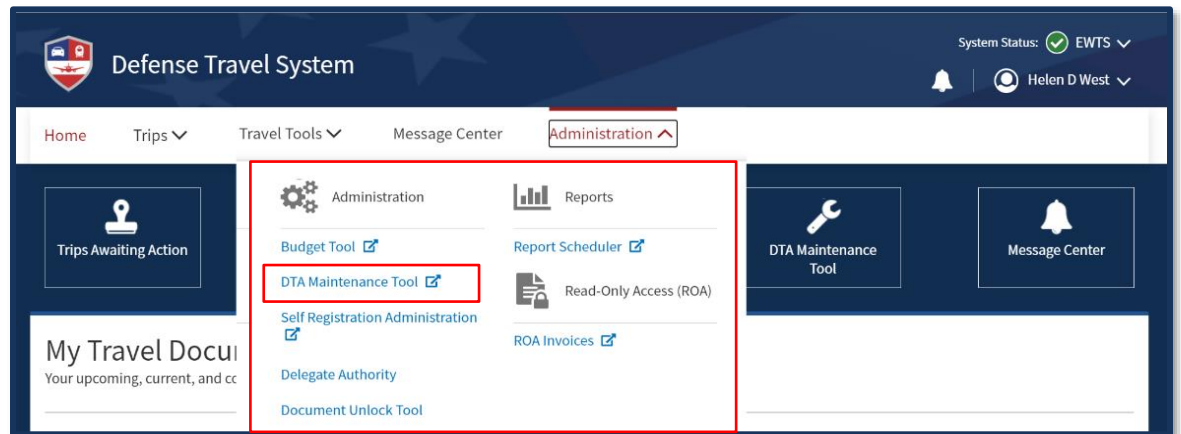

Figure 1: DTS Dashboard

2. On the **DTA Maintenance Tool Home** page, select **Groups** from the drop-down menu (Figure 2).
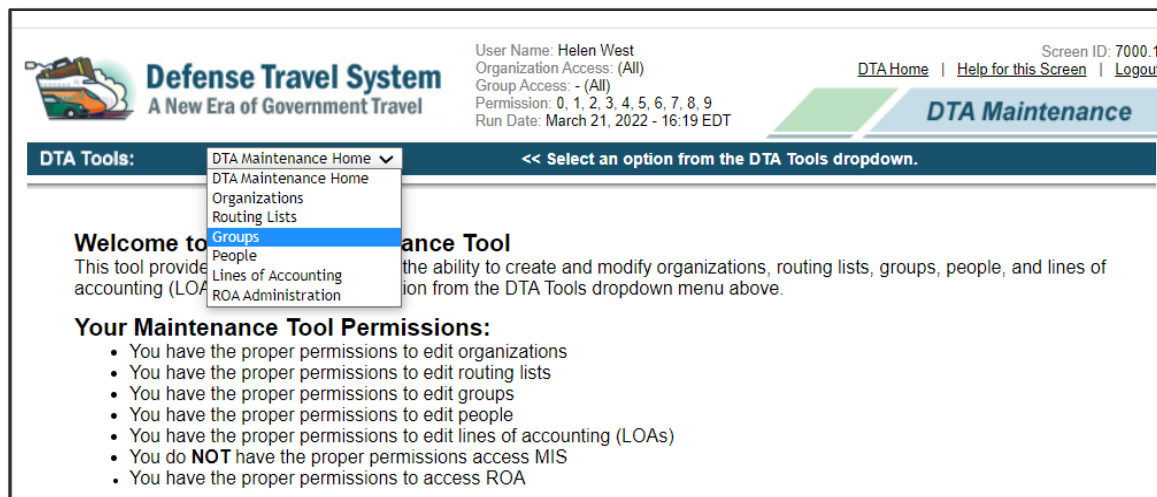
Add a GGMR
(continued)

Figure 2: DTA Maintenance Tool Home Page

3. The **Groups** table displays and defaults to the **Search Group(s)** screen opens. If you need to verify the creation or spelling of the **Group Name** and **Organization Owner Name**, you can **Search Group(s)** for the information (Figure 3, Indicator 1) or if you have already confirmed this step, go directly to the **Global Membership** section of the menu line (Figure 3, Indicator 2). The **Search Organization to Manage Global Group Membership** screen appears (Figure 4).
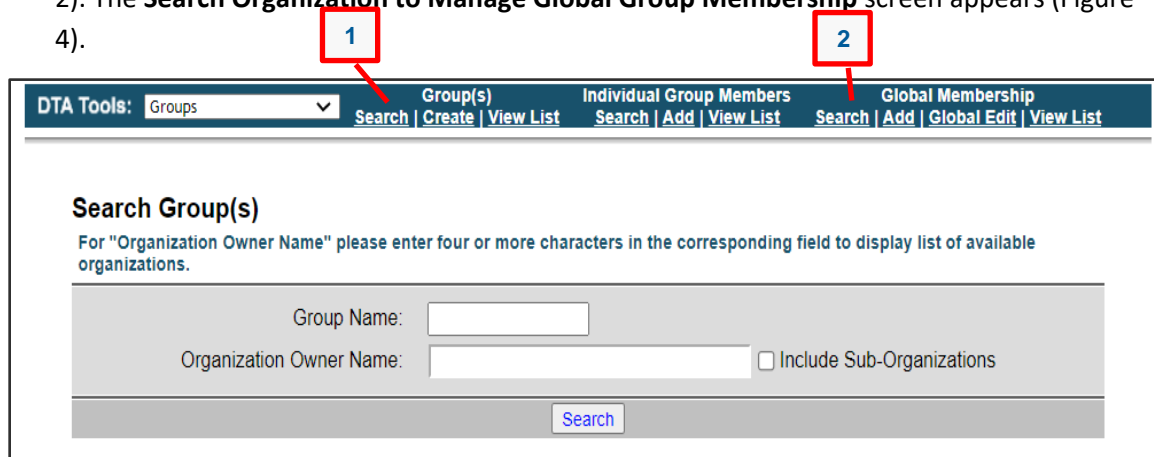

Figure 3: Search Group(s) Screen

Note: Within the **DTA Maintenance Tool**, **Groups** there are three primary sections with multiple functions 1) **Group(s)**, 2) **Individual Group Members**, and 3) **Global Membership**. This paper only covers **GGMRs**. For more on groups, see the *DTA Manual, Chapter 6*.

Add a GGMR
(continued)

Search Organization to Manage Global Group Membership   * Required

For "Member Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Member Organization Name: *   `DTMOCSD`

Group Organization Owner Name: [ ]

Group Name: [ ]

Search

Figure 4: Search Organization to Manage Global Group Membership Screen

4. Select **Add** in the **Global Membership** section of the **Sub-Navigation Bar**. The **Add Global Group Membership** screen opens (Figure 5).

Add Global Group Membership   * Required

For "Member Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.

Member Organization Name: *   `DTMOCSD`

Group Organization Owner Name: *   [ ]

Group Name: *   [ ]

Add Global Membership   Cancel

Figure 5: Add Global Group Membership Screen

5. Complete the **Member Organization Name** field with the organization whose travelers will be in the group.

6. Complete the **Group Organization Owner Name** field with the name of the organization that owns the group.

7. Type the name of the group in the **Group Name** field.

8. Select **Add Global Membership**. The **Global Group Membership (Search Results)** screen displays. It shows the details of the new GGMR.

Note: The group identified in steps 6 and 7 must exist in DTS before you take these steps or you will receive an error message.

Global Edit a GGMR

The **Global Edit** feature allows you to add or remove a GGMR in multiple organizations. Here is how to perform a **Global Edit**:

1. Open **Group**s in the **DTA Maintenance Tool**. The **Search Group(s)** screen opens (Figure 6).

Global Edit a GGMR *(continued)*

Figure 6: Search Group(s) Screen

2. Select **Global Edit** in the **Global Membership** section of the **Sub-Navigation Bar** (Figure 6). The **Search Organization(s)** screen opens (Figure 7).

Figure 7: Search Organization(s)

3. In the **Organization Name** text field, enter the organization (and, optionally, include sub-organizations) that own the group(s) you want to add or delete. Select **Search**.

4. The **Global Edit** screen opens, listing all organizations that matched your search criteria (Figure 8).

Figure 8: Global Edit Screen

Global Edit a GGMR
(continued)

5. Complete the **Group Organization Owner Name** and **Group Nam**e fields to identify the group whose membership you want to update.

6. Check the **Select to Delete** or **Add box** for each organization to edit.

7. Select **Global Delete** to remove all of the selected organizations' travelers from the group and delete the GGMRs.

   -OR-

   Select **Global Add** to add new GGMRs to the selected organizations and make all those organizations' travelers members of the group. The **Global Edit** screen refreshes with the changes applied.

Detach a Profile

For out-processing, verify the traveler's vouchers are complete and there are no other required actions. Log into the MT, select **People** to search for the profile. Pay close attention to the profile setup. If the employee served in a specialized role, such as a routing official you will need to remove the employee from all routing lists, before you can detach the profile from DTS. Be sure to follow your local business rules for role termination and document retention. Once you detach the profile, the traveler retains any group membership until a new organization receives the profile. See the *DTA Manual, Chapter 7* for more information on traveler profiles.

Final Notes

Travelers must belong to at least one group in DTS, but in actuality, they are members of many groups, (e.g., local level, Component level, and higher level or TAC). Using the GGMRs to add travelers to multiple groups (owned by different organizations) concurrently saves time for group maintenance.

Each organization must identify those essential personnel who will receive group access to assist their travelers. As group access allows any time access to travelers' documents, it is vital to safeguard PII data at all times. We should be mindful to only grant access to those who require it to fulfil their DTS role.

Follow your local business rules for profile audit compliance, role appointments and termination requirements.

Resources

DTA Manual, Ch. 6	https://media.defense.gov/2022/May/11/2002994838/-1/-1/0/DTA_6.PDF
DTA Manual, Ch. 7	https://media.defense.gov/2022/May/11/2002994837/-1/-1/0/DTA_7.PDF
DTS DoDI 5154.31	https://travel.dod.mil/Policy-Regulations/DoD-Instruction-515431/