





Management Office



# **DTA Manual, Chapter 6: Groups**

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V1.8



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# **Revision History**

Revision No.	Date	Authorization	Revision/Change Description	Page, Section
1.0	04/25/18	Defense Travel Management Office (DTMO)	Changed format, updated language & screenshots	All
1.1	07/09/18	DTMO	Updated URLs to "https" vs. "http"	Throughout
1.2	08/17/18	DTMO	Changed access to DTA Maintenance Tool through DTS Dashboard	Section 2
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## **Chapter 1: Introduction to DTS Groups**

In the Defense Travel System (DTS), **Groups** protect the *Personally Identifiable Information (PII)* which is available in travelers' DTS documents, by limiting access to documents. This protection is mandated by, and complies with, the Privacy Act.

You can think about a group as a virtual, lockable filing cabinet containing the electronic travel documents of every traveler who belongs to that group. Only people with the authority to access those travelers' documents have the electronic "key" to open the filing cabinet. In this metaphor, group access is that *key*. When you give someone group access in DTS, you enable them to see the documents of travelers who are members of that group. Table 6-1 provides a simplified explanation of this concept.

TRAVEL DOCUMENTS, GROUPS, and GROUP ACCESS				
Physical Object	Virtual Object in DTS			
Lockable filing cabinet: Protects the documents stored within.	<b>Group</b> : Protects the electronic travel documents of travelers who are group members.			
Key to filing cabinet: Allows authorized individuals to access the documents in the filing cabinet.	<b>Group Access</b> : Allows authorized individuals to access the travel documents of travelers who are group members.			
<b>Records</b> : Protected from unauthorized access by the filing cabinet.	<b>Travel Documents</b> : Protected from unauthorized access by the group.			

Table 6-1

Each DTS organization will have at least one associated *primary* **Group**, someone has access to the group, and the travelers assigned to the organization will belong to the *primary* **Group**, see Section 1.1 below for more details. A traveler will be a member of at least one group (for document support), but can belong to as many groups as necessary. Multiple groups may be essential to accommodate access from higher-level organizations, for instance. DTAs at the organization level only need to see travel documents for their travelers, while travel managers at Component headquarters level may need to see travel documents for their entire Component. Likewise, personnel on a help desk that serves several organizations will need access to a group that contains travelers from all the organizations they serve, but no others.

Travelers have automatic access to their own documents and do not require group access. If your organization has travel clerks and Non-DTS Entry Agents (NDEAs), then they would require group access, so they can create the document for the individuals they serve under **Traveler Lookup**.

**Note**: You generally don't have to grant group access to personnel named on a routing list. Routing Officials can access documents routing to them for review without group access. However, if the Routing Official needs to view a document not within **Trips Awaiting Action**, then group access is required to search under **Traveler Lookup**.

There are various DTS Resources available on the DTMO website <u>*Training Search Tool</u></u> to support DTAs, AOs, and travelers. Just a few materials include:</u>* 

- DTA Manual Chapters 1-12 and the Appendices
- DTS Guides 1 5
- DoD DTS Best Practices Guide
- Information Papers and Trifolds
- Web-based training in TraX

#### 1.1 Primary Group

A traveler is *assigned* to a single organization and a member of the *primary* group associated to their assigned org. The Lead DTA must ensure all the travelers are members of the *primary* group using either the automated or manual add method as discussed later in this document. They should follow their Component or Local business rules for tracking and granting *primary* group access to those individuals such as:

- **Travel clerks and Non-DTS Entry Agents (NDEAs)**. Profile update within a document, document creation and processing.
- **DTAs**. Assist with document support and trouble shooting.
- Local help desk personnel. Trouble shoot rejects and system errors.

#### **1.2 Secondary Groups**

You may create *additional* or *secondary* groups at various organization levels to allow only certain authorized personnel access to traveler documents. Authorized personnel may include Component-level DTAs, travel clerks, Centrally Billed Account (CBA) Specialists, Transportation Officers (TOs), and help desk personnel. Each group is a stand-alone entity.

Apart from the fact that organizations own groups, there is no relationship between groups and other organization assets such as routing lists, reports, LOAs, or budgets.

In addition, although organizations own groups at various levels, the groups themselves are not hierarchical. That is, someone with access to a group at HQ level does not automatically have access to groups owned by subordinate organizations. Making a traveler a member of one group never automatically makes a traveler a member of any other group. Therefore, if a traveler requires membership in seven groups, you have to add that traveler to all seven individually or create **Global Group Membership Rules [GGMRs]** to do so automatically.

#### **1.3 Adding Travelers as Group Members**

There are two ways to add travelers to a group:

1. **One at a time**. If you have a small organization with few travelers or low traveler turnover, you may be content to add travelers to a group one at a time. Adding travelers in this manner requires you manually delete them from the group when they leave your organization.

If you need to include travelers from different organizations into one group (say, because they frequently perform travel together), you must add them individually. There is no way to add a GGMR (see below) that puts selected members of different organizations into one group.

For more about how to add individual group members, see section 2.6.

- 2. All at once. If you have a larger organization with many travelers or high traveler turnover, then you may prefer to automate the group maintenance process, by creating GGMRs that will:
  - Simultaneously add all travelers in one organization to one group.
  - Automatically add travelers to that group as soon as they join the organization.
  - Automatically remove members from that group as soon as they join a new organization.

You can create as many GGMRs as needed, to allow automatic group maintenance of multiple groups. For more about how to add GGMRs, see Section 2.9.

#### **1.4 Group Planning**

You will need to do a little planning before you create a group in DTS. Discuss the process with another LDTA or a Component Representative and consider the following questions:

- 1. Which organization will own the group?
- 2. What will you name the group?
- 3. Who will be members of that group?
- 4. Who will have access to the group?
- 5. Will travelers join the group automatically (via GGMR) or will a DTA add them individually?

#### **1.5 Group Structure**

Groups are not hierarchical, but are associated to a specific organization. Consider using an organization chart to identify organizations that require at least one group or more. Figure 6-1 shows an example of how to use an organization chart in this way. Of course, your organization's needs will ultimately determine its group structure.



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

Here are some details about this organization set-up:

- 1. The 509th Bomb Wing owns the group 509BW (the blue triangle). A person given access to 509BW can see documents that belong to travelers in all four organizations.
- 2. That 509th Operations Group owns the group OG (the red triangle). A person given access to OG can see documents that belong to travelers in the 509th Operations Group and both of its subordinate squadrons.
- 3. The 509th Support Squadron owns the group SUP (the yellow circle). A person given access to SUP can only see documents that belong to travelers in the Support Squadron.
- 4. Three of the four organizations 509th Bomb Wing, 509th Operations Group, and 325th Bomb Squadron own no groups that only include its own travelers. Although travelers assigned to those organizations can get help with their documents (for example, by someone with group access to 509BW), there is no way to limit access to only documents owned by those organizations.

#### **1.5.1 Group Structure Examples**

The main organization's group structure consists of the following items:

- Group Names
- (Group) Organization Owner Names
- List of personnel who require group access to each group
- GGMR for each organization

You must maintain group structure or mapping of organizations to groups, access, and membership 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 and Table 6-3 illustrate a sample group structure worksheet for two Components. Table 6-4 is a DoD Agency sample. **Note**: Contact your Component Representative for your actual group structure and additional setup guidance.

**Notes**: In the chart examples, the abbreviation for ORG = Organization and GP = Group.

	SAMPLE ARMY GROUP STRUCTURE WORKSHEET							
Org of Assignment	Primary Group	Group Access	Travelers are Members of One or More Groups					
DA624	MAIN	LDTA, Help Desk	ORG Owner	GP Name	ORG Owner	GP Name	ORG Owner	GP Name
			DA624	MAIN				
DA624OSS	SSTAFF	ODTA, S-1	DA624	MAIN	DA624OSS	SSTAFF		
DA624OPS	OPS	ODTA, Clerk	DA624	MAIN	DA624OPS	OPS		
DA624OPSFLT	OPSF	ODTA Clerk	DA624	MAIN	DA624OPS	OPS	DA624OPSFLT	OPSF

#### Table 6-2

#### Table 6-3

SAMPLE NAVY GROUP STRUCTURE WORKSHEET								
Org of Assignment	Primary Group	Group Access		Travelers are Members of One or More Groups				
DN11N4	N4	LDTA, FDTA,	ORG Owner	GP Name	ORG Owner	GP Name	ORG Owner	GP Name
		Help Desk	DN11N4	N4				
DN11N40	N40	AO, NDEA, Clerk	DN11N4	N4	DN11N40	N40		
DN11N41	N41	AO, NDEA, Clerk	DN11N4	N4	DN11N41	N41		
DN11N41ADM	N41ADM	AO, NDEA, Clerk	DN11N4	N4	DN11N41	N41	DN11N41ADM	N41ADM

#### Table 6-4

SAMPLE AGENCY GROUP STRUCTURE WORKSHEET								
Org of Assignment	Primary Group	Group Access	Travelers are Members of One or More Groups					
DD15	DD15	LDTA, FDTA,	ORG Owner	GP Name	ORG Owner	GP Name	ORG Owner	GP Name
		Help Desk	DD15	DD15				
DD15HQOCF	HQCOCF	AO, NDEA, Clerk	DD15	DD15	DD15HQ OCF	HQCOCF		
DD15HQOCFCH AMB	FHCHAMB	AO, NDEA, Clerk	DD15	DD15	DD15HQ OCF	HQCOCF	DD15HQO CFCHAMB	FHCHAMB

## **Chapter 2: Working with DTS Groups**

You access DTS at <u>https://dtsproweb.defensetravel.osd.mil/dts-app/pubsite/all/view/</u>. Once logged into the system, you can perform administrative actions. The DTS **DTA Maintenance Tool** allows you to manage and maintain your organization's resources. You use the **Groups** module to locate, create, update group membership lists, and delete groups. The various sections of this chapter discuss all these options.

From the **DTS Dashboard**, mouse over the **Administration** menu (Figure 6-2), then select **DTA Maintenance Tool**. **Note**: You can also use the quick tile to access **DTA Maintenance Tool**.

Defense Trave	el System			System Status: 🔗 EWTS 🗸
Home Trips 🗸 Tra	wel Tools 🗸 🧼 Message Cente	Administration 🔨	. /	
Trips Awaiting Action	Administration Budget Tool C DTA Maintenance Tool C	Reports Report Scheduler	DTA Maintenance Tool	Message Center
My Travel Docu Your upcoming, current, and cc	Delegate Authority	ROA Invoices 🗹		

Figure 6-2: DTS Dashboard – Administration Menu

The **DTA Maintenance Tool Home** page (Figure 6-3) opens. From the **DTA Tools Bar** (which appears on every screen in the **DTA Maintenance Tool**), you can access all the **DTA Maintenance Tool** modules in which you have permissions, without returning to the **DTS Dashboard**.

	Defense Travel System A New Era of Government Travel	User Name: <b>Helen West</b> Organization Access: (All) Group Access: - (All) Permission: 0, 1, 2, 3, 4, 5, 6, 7, 8, 9 Run Date: June 23, 2022 - 11:26 EDT	Screen ID: 7000.1 <u>DTA Home</u>   <u>Help for this Screen</u>   <u>Lopout</u> <b>DTA Maintenance</b>
DTA Tools:	DTA Maintenance Home 💙	<< Select an option from the DT/	A Tools dropdown.
Welco This too accoun Your	by provides authorized DTAs with the abiliting (LOAs). Please select an option from <b>Maintenance Tool Permission</b> four have the proper permissions to edit prou have the proper permissions to edit prou have the proper permissions to edit prou have the proper permissions to edit prove the proper permissions to edit fou have the proper permissions to edit for what th	Tool ty to create and modify organizations, the DTA Tools dropdown menu above science of the tools dropdown menu above statistic of the tools of the tools of the tools outing lists roups leople nes of accounting (LOAs) access MIS as ROA	routing lists, groups, people, and lines of e.

Figure 6-3: DTA Maintenance Tool Home Page

Select **Groups** from the **DTA Tools** drop-down list. The **Search Group(s)** screen (Figure 6-4) opens and the **DTA Tools Bar** updates providing options to allow:

- Search for groups or group members
- Create groups

- Add members to or remove members from groups
- Create a report that shows you the groups an organization owns
- Create a report that shows you the members of a group
- Create a report that shows you the GGMRs an organization owns

Below is a description of each of these options.

Group(s)	Individual Group Members	Global Membership
Search   Create   View List	Soarch   Add   Viow   ist	Search   Add   Global Edit   View   ist
<u>Search   Create   View List</u>	<u>Search   Aud   view List</u>	Search Add Global Edit View List

#### Figure 6-4: DTA Tools Bar Group Options

#### 2.1 Search for Groups

You use the **DTA Maintenance Tool** to **Search** for the groups associated to your organizations. To help you do that, the **Search Group(s)** screen (Figure 6-5) automatically opens when you open the **Groups** module. You can also access this screen from any screen in **Groups** by selecting **Search Group(s)** in the **DTA Tools Bar**.

Search Group(s)		
For "Organization Owner Name" please ent organizations.	er four or more characters in the corresp	onding field to display list of available
Group Name:		
Organization Owner Name:	DTMOCSD	Include Sub-Organizations
	Search	

Figure 6-5: Search Group(s) Screen

To search for a group:

- 1. (Optional) Enter one or more letters of the **Group Name** to limit your search to groups that include those letters. Leave it blank to include all groups in the search.
- (Optional) Your main organization's name (based on your organization access) appears by default in the Organization Owner Name text field. Change it if you need to search for a different organization.

**Note**: DTS always identifies a group by both its name and the organization that owns it. However, the owning organization name appears slightly different on different screens (e.g., **Organization Owner Name**, **Group Organization Owner Name**).

- 3. (Optional) If you want to view organizations subordinate to the one in the **Organization Owner Name** field, check the **Include Sub-Organizations** box.
- 4. Select Search. The Group(s) (Search Results) screen (Figure 6-6) opens.

Group(s) (Search Results)					
Organization Owner Name: DTMOCSD Group Name:					
Edit	Organization Owner Name	Group Name			
Delete	DTMOCSD	CSD			
Delete	DTMOCSD	OPS			
Delete	DTMOCSD	Training			
Delete	DTMOCSDOPS	OPS			
Delete	DTMOCSDOPS	SIM			
Delete	DTMOCSDTRAINING	HD			
Delete DTMOCSDTRAINING OPS					
	1 - 7 of 7				

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

From this results screen, your option is **Delete**, which is covered in Section 2.2 below.

#### 2.2 Delete a Group

The only action you can take from the **Group(s)** (Search Results) screen is **Delete.** You cannot edit a group name, so if the group name is spelled incorrectly, you have to remove it and then re-create it.

DTS applies specific rules for groups.

- You cannot delete a group containing members. If you try, DTS generates an error message to let you know why your delete attempt failed.
- Always be certain you are deleting the correct group, as once selected and confirmed the group is removed from the system.
- When you do delete the group, individuals who have group access to that group lose that access (that is, their profile updates to reflect **None** in the **Group Access** field).
- Try to name group specifically. As long as different organizations own them, DTS allows you to have multiple groups with the same name. **Note**: If you have access to many groups that have the same name it can be a little confusing.

Once a group has no members, here is how to delete it:

- 1. Select **Delete** next to the group you want to remove from the system. The **Delete Group** screen opens.
- 2. Verify you have the correct group, select **Delete Group**. The **Group(s)** (Search Results) screen opens. The group you just deleted is no longer in DTS.

#### 2.3 Create a Group

When you create a group, suggest following a few format rules such as using capital letters and no special characters. The group is a shell and it initially has no members. You must add those later. See sections 2.6 and 2.9 to learn how to add members to a group.

To create a new group:

1. Select **Create** in the **Group(s)** section of the **DTA Tools Bar** (Figure 6-7). The **Create Group** screen (Figure 6-7) opens.

Create Group ·	Required			
For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations.				
Group Name: •				
Organization Owner Name: * DTMOCSD				
Save Group Cancel				

Figure 6-7: Create Group Screen

- 2. Enter a descriptive **Group** Name.
- 3. (Optional) Your main organization's name appears by default in the **Organization Owner Name** text field. Change it if a different organization will own this group.
- 4. Select Save Group.
- 5. On the **Group(s) (Search Results)** screen you should see the newly created group.

#### 2.4 Search for Group Members

Before you can remove group members, you must find them. To do that, select **Search** in the **Individual Group Members** section of the **DTA Tools Bar** (Figure 6-4) from any screen in the **Groups** module.





The Search Individual Group Member(s) List screen (Figure 6-8) opens.

Search Individual Group Member(s) • Require For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.			
Organization Owner Name: * Group Name: *	DTMOCSD CSD V		
Member SSN: Member Last Name: Member First Name: Include group members added through Global Group Membership:			
	Search		

Figure 6-8: Search Individual Group Member(s) List screen

- 1. (Optional) Your main organization's name appears by default in the **Organization Owner Name** text field. Change it if you want to see members in a group owned by a different organization.
- 2. Select the **Group Name**.
- (Optional) Limit your search results by entering a SSN, all or portions of a Member First Name or Member Last Name. Searching by SSN results in (at most) a single result. Searching by a full or partial name may provide multiple results.
- 4. (Optional) Check the Include group members added through Global Group Membership box to show all group members. Leave it unchecked if you only want to see members added individually.
- Select Search. The Individual Group Member(s) (Search Results) screen (Figure 6-9) displays. It shows each displayed group member's name, a truncated SSN, the organization of assignment, and the method by which they joined the group. A Remove button displays for all members added by the "Automatic" method (GGMR).

Individual Group Member(s) (Search Results) For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.				
Organization Owner Name: DTMOCSD     Member SSN:       Group Name: CSD     Member Last Nar       Include Global Group Members: Yes     Member First Nar				Member SSN: Member Last Name: Member First Name:
Edit	Member Name	Member SSN	Member Organization	Add Method
	West, Chris A	XXXXX9741	DTMOCSD	Automatic
Remove	West, Eric T	XXXXX9743	DTMOCSD	Manual
	West, Molly T	XXXXX9742	DTMOCSD	Automatic
	1 - 3 of 3			

Figure 6-9: Individual Group Member(s) (Search Results) Screen

#### 2.5 Remove a Member from a Group

The only action you can take on the **Individual Group Member(s) (Search Results)** screen is to remove members from the group. Before you remove a traveler from the group, you should ensure that they are in at least one other group. There are two ways to remove an individual from a group:

- Member added via the Manual method (individually). From the Individual Group Member(s) Search Results screen (Figure 6-9) select Remove next to the person's name. The screen refreshes and the traveler no longer displays. DTS does not require a confirmation of this action. One click and the member is out of the group.
- Member added via the Automatic method (GGMR). The Remove button doesn't display for the member, so you must first add them to the group following the steps in section 2.6. This will override their Automatic addition, change it to a Manual addition, and provide a Remove button for the individual. Now you can follow the instructions for removing a member who joined the group via the Manual method.

#### 2.6 Add a Member to a Group Manually

To add one member to a group manually:

1. Select Add in the Individual Group Members section of the DTA Tools Bar (Figure 6-4). The Add Individual Group Member screen (Figure 6-10) opens.

Add Individual Group Member • Required For "Organization Owner Name" please enter four or more characters in the corresponding field to display list of available organizations and corresponding group names.
Organization Owner Name:  DTMOCSD Group Name:  CSD
Member SSN: : * Search
Add Member Cancel

Figure 6-10: Add Individual Group Member Screen

- 2. (Optional) Your main organization's name appears by default in the **Organization Owner Name** text field. Change it if you want to add the members to a group a different organization owns.
- 3. Select a Group Name.
- 4. Select the member you want to add using one of two methods:
  - By **SSN**: Complete the SSN field. You can use this method with any traveler, but you must use this method if the traveler belongs to an organization to which you do not have access. If you use this method, skip ahead to step 8.
  - By Name: Select Search. The Search People screen (Figure 6-11) opens.

Search People		• Required
Organization Name: *	DTMOCSD	Include Sub-Organizations
SSN:		
	OR	
Last Name:		
First Name:		
You must specify at least a name. If you choose to entrease the set of SSN and name y the name you entered is constant both.	n SSN or a name (last required er matching information for both ou entered do not belong to the rrect. For best results, it is reco	first optional) in addition to specifying an Organization the SSN and the name, you may get a match. However, if same person, no result will be shown even if the SSN or nmended that you enter either an SSN or a name, but not
	Search Close	Window

Figure 6-11: Add Individual Group Member Screen

- 5. Complete as many fields as necessary. Only the **Organization Name** is required; the other fields provide you with more (**Include Sub-Organizations**) or fewer (**Last Name**, **First Name**) search results.
- 6. Select Search. The Search People Results screen (Figure 6-12) opens.

Search Peo	ple Results			
Organization Name:         DTMOCSD         Last Name:         SSN: 999989743           Include Sub-Organizations:         false         First Name:         SSN: 999989743				
Select Person	Name	SSN	Organization	
Select	West, Eric T	XXXXX9743	DTMOCSD	
1 - 1 of 1				
Back to People Search Close Window				

Figure 6-12: Search People Results Screen

- 7. Choose **Select** next to the person you want to add. The **Add Individual Group Member** screen (Figure 6-10), opens with the **Member SSN** field filled in.
- 8. Select Add Member. The Individual Group Member(s) Search Results screen displays the new member's details.

**Note**: The traveler profile provides the ability to view all the groups a traveler as a member of. For more on traveler profiles, see the <u>DTA Manual, Chapter 7</u>.

#### 2.7 Search for GGMRs

Before you can remove a GGMR, you must find it. To do that, select **Search** in the **Global Membership** section of the **DTA Tools Bar** (Figure 6-4) from any screen in the **Groups** module. The **Search Organization to Manage Global Group Membership** screen (Figure 6-13) opens. **Note**: Unlike many other searches in the **DTA Maintenance Tool**, you can only search in one organization at a time to locate a GGMR.

Search Organization to Manage Global Group Membership For "Member Organization Name" please enter four or more characters in the corresponding field to display list of avail- organizations.			
Member Organization Name: • DTMOCSD Group Organization Owner Name: Group Name:			
Search			

Figure 6-13: Search Individual Group Member(s) Screen

- 1. (Optional) Your main organization's name appears by default in the **Member Organization Name** text field. Change it if you want to see the GGMRs a different organization owns. **Note**: This is the organization whose travelers that will become members of the group.
- (Optional) Enter a Group Organization Owner Name to limit the search results to GGMRs owned by a single organization. If you use this field, you must enter the full organization name. DTS does not allow you to search on a partial organization name. Leave the field empty to see all the GGMRs the organization owns. Note: This is the organization that owns the group the travelers will become members of. It may or may not be the same as the Member Organization Name.

- (Optional) Enter a full or partial Group Name to limit the search results to group names that contain the characters you enter. Leave the field empty to see all Group Names. Note: The travelers will become members of this group.
- 4. Select **Search**. The **Global Group Membership (Search Results)** screen (Figure 6-14) displays. It shows all the GGMRs that match your search criteria.

Global Group Membership (Search Results)				
Group Organization Owner Name: Group Name: Group Name: Group Name: Member Organization Name: DTMOCSDOPS				
Edit	Group Organization Owner Name	Group Name		
Remove	DTMOCSD	CSD		
Remove	DTMOCSDOPS	OPS		
Remove	DTMOCSDTRAINING	HD		
1 - 3 of 3				

Figure 6-14: Global Group Membership (Search Results) Screen

#### 2.8 Remove a GGMR

The only action you can take from the Global Group Membership (Search Results) screen is to remove a GGMR.

To remove a GGMR:

- 1. Select **Remove** next to the **GGMR** you want to delete. The **Remove Global Group Membership** screen opens.
- 2. Select **Remove Global Membership**. The **Global Group Membership (Search Results)** screen opens. The GGMR you just deleted is not on the screen.

#### 2.9 Add a GGMR

To add a Global Group Membership Rule:

1. Select Add in the Global Membership section of the DTA Tools Bar (Figure 6-4). The Add Individual Group Member screen (Figure 6-10) opens.

Add Global Group Membership For "Member Organization Name" please enter four or more characters in the corresponding field to display list of avail organizations.	* Required able
Member Organization Name:  DTMOCSD Group Organization Owner Name:  Group Name:	
Add Global Membership Cancel	

Figure 6-15: Add Individual Group Member Screen

- 2. (optional) Your main organization's name appears by default in the **Member Organization Name** text field. Change it if you want the GGMR to affect a different organization's travelers. **Note**: This is the organization whose travelers will become members of the group.
- (optional) Enter the Group Organization Owner Name. Note: This is the organization that owns the group the travelers will become members of. It may or may not be the same as the Member Organization Name.
- 4. (optional) Enter a Group Name. Note: This is the group the travelers will become member of.
- 5. Select Add Global Membership. The Global Group Membership (Search Results) screen displays. It shows the details of the new GGMR.

#### 2.10 Globally Edit GGMRs

The **Global Edit** feature lets you simultaneously add all travelers from one or more organizations to the same group, or delete all travelers from one or more organizations from the same group.

To perform a Global Edit:

1. Select Global Edit in the Global Membership section of the DTA Tools Bar (Figure 6-4). The Search Organization(s) screen (Figure 6-16) opens.

Search Organization(s) For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.				
Organization Name: DTMOCSD  Include Sub-Organizations				
	Search			

Figure 6-16: Search Organization(s) Screen

- (optional) Your main organization's name appears by default in the Organization Name text field.
   Change it if you want to. Note: This is the highest-level organization you want to include in your search.
- 3. (optional) If you want to include organizations subordinate to the one in the **Organization Name** field, check the **Include Sub-Organizations** box.
- 4. Select **Search**. The **Global Edit** screen (Figure 6-17) opens. It provides all the tools you need to make global changes to your organization's GGMRs.

Global Edit For "Organization Name" please enter four or more characters in the corresponding field to display list of available organizations.				
Group Organization Owner Name: • Group Name: •				
Select to Delete or Add	Organization Code			
	DTMOCSD			
	DTMOCSD460FM			
	DTMOCSDOPS			
	DTMOCSDTRAINING			
Global Delete Global Add				
1 - 4 of 4				

#### Figure 6-17: Global Edit Screen

- 5. Enter the **Group Organization Owner Name** and **Group Name** fields to identify the group to which you want to add or remove travelers.
- 6. Check the box next to each organization whose travelers will become members or will no longer be members of the group named in step 5.
- 7. Select a **Global Edit** option:
  - **Global Delete**. This option removes the selected organizations' travelers from the group in step 5.
  - **Global Add**. This option adds the selected organizations' travelers to the group named in step 5.

Once you select an option, the **Global Edit** screen opens. You make your change. To verify the changes, the easiest way is to run a **Global Group Membership Report** (see section 3.3).

### **Chapter 3: Group Module Reports**

There are three reports or view lists you can run within Groups; **Group Structure, Group Member,** and **Global Group Membership Lists**. See sections 3.1, 3.2, and 3.3 for details.

#### **3.1 View Group Structure List**

The **Group Structure List** shows the organizations with their associated groups.

#### To run a Group Structure Report:

1. From any screen in the **Groups** module, select **View List** in the Group(s) section of the **DTA Tools Bar**. The **View Group Structure List** screen opens (Figure 6-18).

View Group Structure List For "Organization Name" please enter organizations.	four or more characters in t	he corresponding field to display list of available
Organization Name:	DTMOCSD	Include Sub-Organizations
	Run Re	port

Figure 6-18: View Group Structure List Screen

- 2. (Optional) Your main organization name appears by default in the **Organization Name** text field. You can enter a different organization instead.
- 3. (Optional) Check the Include Sub-Organizations box to include search results from organizations subordinate the selected organization.
- 4. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

#### 3.2 View Group Member List

The **Group Member List** shows the travelers belonging to your organizations' groups.

To run a Group Member Report:

1. From any screen in the **Groups** module, select **View List** in the **Individual Group Members** section of the **DTA Tools Bar**. The **View Group Member List** screen (Figure 6-19) opens.

View Group Member List ·	Required
Organization Owner Name:  DTMOCSD Group Name:  CSD	
Run Report	

Figure 6-19: View Group Member List Screen

2. (Optional) Your main organization name appears by default in the **Organization Name** text field. You can enter a different organization instead.

- 3. Select the group whose membership you want to see.
- 4. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

#### 3.3 View Global Group Membership List

The Global Group Membership List shows travelers belonging to your organizations' groups.

To run a Global Group Membership Report:

 From any screen in the Groups module, select View List in the Global Membership section of the DTA Tools Bar. The View Group Member List screen (Figure 6-20) opens.

View Global Group Membership List				
Organization Name:	DTMOCSD		Include Sub-Organizations	
		Run Report		

Figure 6-20: View Group Member List Screen

- 2. (Optional) Your main organization name appears by default in the **Organization Name** text field. You can enter a different organization instead.
- 3. (Optional) Check the **Include Sub-Organizations** box to include search results from organizations subordinate the selected organization.
- 4. Select **Run Report**. DTS prompts you to open or save the report. The option you select determines whether DTS downloads the report to your computer or displays it in an Excel spreadsheet.

# Chapter 6: The DTA Manual: Contents & Links

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Chapter 2: DTS Access	https://media.defense.gov/2022/May/11/2002994797/-1/- 1/0/DTA_2.PDF
Chapter 3: DTS Site Setup	https://media.defense.gov/2022/May/11/2002994799/-1/- 1/0/DTA_3.PDF
Chapter 4: Organizations	https://media.defense.gov/2022/May/11/2002994824/-1/- 1/0/DTA_4.PDF
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