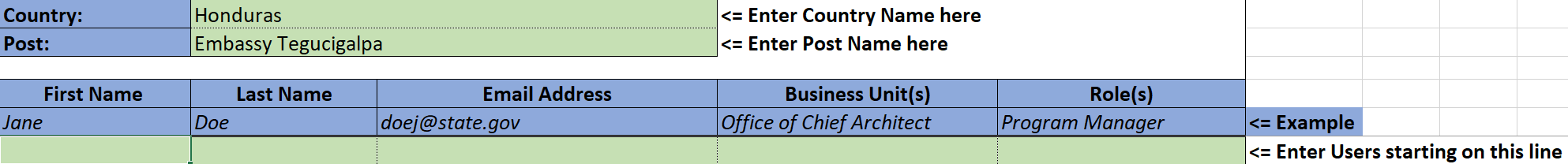
**Introduction**

The GTTS New Post Onboarding User & Data Forms are designed to assist a Post with collecting and documenting the information that the GTTS Project Team will need in order to configure User & Post profiles in the Global Training Tracking System (GTTS). This document will provide instructions and guidelines on how to use and complete the forms in the template file.

The template file is a Microsoft Excel Spreadsheet file that contains thirteen (13) worksheets/tabs. A single .xlsx file is intended to hold all the information needed for a **SINGLE (1)** Post/Country:

|  |  |
| --- | --- |
| Worksheet/Tab | Description |
| GTTS User Roles & Permissions | Information about the different User Roles & Permissions in the Global Training Tracking System (GTTS). |
| GTTS Users | Information about individual users and their roles within GTTS. |
| Business Units | Information about the Business Units at Post (including if they have a Duty to Inform and if they are a Courtesy Vetting Unit. |
| Ranks | Information about the different military and police organization ranks in use by the Host Nation. |
| Vetting Funding | Information about Vetting Funding Sources in use at the Post. |
| Vetting Authorizing Laws | Information about Vetting Authorizing Laws in use at the Post. |
| Key Activities & Programs | Information about Key Activities & Programs in use at the Post. |
| Authorizing Documents | Information about Training Event Authorizing Documents in use at the Post. |
| Training Event Funding Sources | Information about Training Event Funding Sources in use at the Post. |
| States | Information about the Host Nation’s States or Provinces. |
| Cities | Information about the Host Nation’s Cities and/or Municipalities. |
| Default Budget Calc Values | Information about the Budget Calculator Categories, Items, and their Default Cost Values in use at the Post. |
| Configuration Values | Information about different Post or Agency-at-Post specific GTTS application configuration values. |

To assist you in completing the template, data entry & editable fields are indicated with a green highlight. Additionally, you will see prompts indicating what to do.



We recommend reviewing this entire document and the template file before entering any information on the worksheets/tabs.

**GTTS User Roles & Permissions**

This worksheet/tab is read-only and is provided as a guide or summary of the different user roles and the system access rights each role has in GTTS. As you populate the GTTS Users worksheet/tab with the names of individual users at Post that are to be given access to the system, please refer to this worksheet/tab to understand exactly what rights and capabilities will be given to the user in a given role.

Initially there are 4 roles within GTTS, which are:

|  |  |
| --- | --- |
| Current GTTS Roles | Description |
| Program Manager | Responsible for creating & managing Training Events & Participants. |
| Courtesy Vetter | Responsible for performing Courtesy Vetting activities. |
| Vetting Coordinator | Responsible for performing Courtesy Vetting activities. Additionally, coordinates the vetting workflow process and Courtesy Vetting activities. |
| Global Admin | Responsible for managing & configuring the GTTS application & database configuration parameters world-wide. This is not typically in use at a Post. |

Additional roles that will be added and activated as the capabilities of GTTS increase. These roles include, but are not necessarily limited to:

|  |  |
| --- | --- |
| Future GTTS Roles | Description |
| Post Admin | Responsible for managing and configuring the GTTS application & database configuration parameters at the Post level. |
| Agency Admin | Responsible for managing and configuring the GTTS application & database configuration parameters at the Agency within a Post level. |
| M&E Manager | Responsible for managing & conducting the Survey & Reporting modules within the system. |
| Political Vetter | Responsible for managing and conducting the Political Vetting activities within the system. |
| Consular Vetter | Responsible for managing and conducting the Consular Vetting activities within the system. |
| Consular Approval | Responsible for approving Consular Vetting results within the system. |
| Implementing Partner | Host nation, USG, or civilian organizations or units to whom events are outsourced. |
| Report Manager | Able to access data on a read-only basis and to create/generate reports from the system. |

In GTTS, there are 4 permissions that a GTTS user can have within their assigned Role:

|  |  |
| --- | --- |
| Permissions | Description |
| Create | User can create new records or data entries within their assigned Role. |
| Read | User can view data within their assigned Role. |
| Update | User can edit or change data within their assigned Role. |
| Delete | User can remove data within their assigned Role. |

GTTS is designed to operate in a hierarchy (Global 🡪 Post 🡪 Agency-at-Post). In addition to being assigned specific Roles within the system, User will be assigned access to specific Posts and specific Agencies within the Post. This means that within a given Role, a User will only have access to data attached or linked to specific Posts and specific Agencies within the Post. For a User to be able to access data specific to a Post or Agency, they will need to be granted access to that Post and Agency within the Post.

Users are not limited to a single Role or hierarchy level. Multiple Roles can be assigned to a User. We recommend however that Users only be granted the minimal number of Roles that they truly need to do their job.

**GTTS Users**

This worksheet/tab is where you will provide information about the Users at your Post that you want access to GTTS to be given to. As you complete this worksheet/tab, please refer to the **GTTS User Roles & Permissions** worksheet/tab for guidance on the different Roles within GTTS. **IMPORTANT NOTE:** If you want a User to have multiple Roles (i.e. Training Events & Vetting Module), you will need to enter the User’s information twice. Once for the Program Manager Role and once for the Vetting Coordinator Role.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Country | **REQUIRED** | Enter the name of the Country that is being on-boarded. |
| Post | **REQUIRED** | Enter the name of the U.S. Department of State Post that is being on-boarded. |
| First Name | **REQUIRED** | Enter the User’s first name. |
| Last Name | **REQUIRED** | Enter the User’s last name. |
| Email Address | **REQUIRED** | Enter the User’s Email Address. This will need to be the User’s official U.S. Government email address and not their personal email address. |
| Business Unit(s) | **REQUIRED** | Enter the name of the User’s Business Unit at the Post. |
| Role(s) | **REQUIRED** | Select the Role to be granted to the User from the drop-down. Currently, the only available options are: Program Manager, Courtesy Vetter, & Vetting Coordinator. |

**Business Units**

This worksheet/tab is where you will provide information about the different Business Units at your Post. In addition to listing the Business Units, we also need to know if the Business Unit has a Duty to Inform (required to inform the Host Nation about individuals that failed Vetting) and if the Business Unit is also a unit that performs Courtesy Vetting activities (Name Checks & scans of local media and internal Unit resources on individual participants). Not every Business Unit at the Post will perform Courtesy Vetting.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Business Unit Name | **REQUIRED** | Enter the name of the Business Unit at Post. |
| Business Unit Acronym | **REQUIRED** | Enter an Acronym for the Business Unit at Post. |
| Has Duty to Inform? | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO” to indicate if the Business Unit has a Duty to Inform the Host Nation of any individuals that failed Vetting. |
| Is Courtesy Vetting Unit? | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO” to indicate if the Business Unit is also a Courtesy Vetting Unit that performs Courtesy Vetting activities. |

**Ranks**

This worksheet/tab is where you will identify military, police, or other Host Nation organization Ranks. These Ranks are required by the INVEST system when performing Leahy Vetting checks. The GTTS system uses Ranks in English. Please indicate which of the listed Ranks are in use by your Host Nation by putting a “X” in the YES or NO column for each listed Rank. If there are Ranks that are used by your Host Nation that are not listed, please add them to the bottom of the list AND put a “X” in the “YES” column for the added Rank.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Rank Name | **REQUIRED** | The name of the Rank. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Vetting Funding**

This worksheet/tab is where you will identify specific Vetting Funding Sources that are in use at your Post. Please indicate which of the listed Vetting Funding Sources are in use at your Post by putting an “X” in the YES or NO column for each listed Vetting Funding Source. If there are Vetting Funding Sources that are used at your Post that are not listed, please add them to the bottom of the list AND put an “X” in the “YES” column for the added Vetting Funding Source.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Code (if applicable) | **OPTIONAL** | ID code for the Vetting Funding Source. |
| Description | **REQUIRED** | Description or title of the Vetting Funding Source. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Vetting Authorizing Laws**

This worksheet/tab is where you will identify specific Vetting Authorizing Laws that are in use at your Post. Please indicate which of the listed Vetting Authorizing Laws are in use at your Post by putting an “X” in the YES or NO column for each listed Vetting Authorizing Law. If there are Vetting Authorizing Laws that are used at your Post that are not listed, please add them to the bottom of the list AND put an “X” in the “YES” column for the added Vetting Authorizing Law.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Code (if applicable) | **OPTIONAL** | ID code for the Vetting Authorizing Law. |
| Description | **REQUIRED** | Description or title of the Vetting Authorizing Law. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Key Activities & Programs**

This worksheet/tab is where you will identify specific Key Activities & Programs that are in use at your Post. Please indicate which of the listed Key Activities & Programs are in use at your Post by putting an “X” in the YES or NO column for each listed Key Activity & Program. If there are Key Activities & Programs that are used at your Post that are not listed, please add them to the bottom of the list AND put an “X” in the “YES” column for the added Key Activity & Program.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Code (if applicable) | **OPTIONAL** | ID code for the Key Activity & Program. |
| Description | **REQUIRED** | Description or title of the Key Activity & Program. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Training Event Authorizing Documents**

This worksheet/tab is where you will identify specific Training Event Authorizing Documents that are in use at your Post. Please enter a list of Training Event Authorizing Documents that are in use at your Post by entering an identifying code or name as well as a description of the Training Event Authorizing Document.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Code or Name | **REQUIRED** | Enter the identifying code or name of the Training Event Authorizing Document. |
| Description (if applicable) | **OPTIONAL** | Enter a description of the Training Event Authorizing Document. |

**Training Event Funding Sources**

This worksheet/tab is where you will identify specific Training Event Funding Sources that are in use at your Post. Please enter a list of Training Event Funding Sources that are in use at your Post by entering an identifying code or name as well as a description of the Training Event Funding Source.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Code or Name | **REQUIRED** | Enter the identifying code or name of the Training Event Funding Source. |
| Description (if applicable) | **OPTIONAL** | Enter a description of the Training Funding Source. |

**States**

This worksheet/tab is where you will confirm or identify the specific geographic States or Provinces that exist in your Host Nation. Please indicate which of the listed States or Provinces are in use in your Host Nation by putting an “X” in the YES or NO column for each listed State or Province. If there are States or Provinces that are in use in your Host Nation that are not listed, please add them to the bottom of the list AND put an “X” in the “YES” column for the added State or Province.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| State Name | **REQUIRED** | Name of a geographic State or Province in the Host Nation. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Cities**

This worksheet/tab is where you will confirm or identify the specific geographic Cities or Municipalities that exist in your Host Nation. Please indicate which of the listed Cities or Municipalities are in use in your Host Nation by putting an “X” in the YES or NO column for each listed City or Municipality. If there are Cities or Municipalities that are in use in your Host Nation that are not listed, please add them to the bottom of the list AND put an “X” in the “YES” column for the added City or Municipality.

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| State Name | **REQUIRED** | Name of the State that the City or Municipality is in within the Host Nation. |
| City Name | **REQUIRED** | Name of a geographic City or Municipality in the Host Nation. |
| YES / NO | **REQUIRED** | Put a “X” in the correct column corresponding to “YES” or “NO”. |

**Default Budget Calculator Values**

This worksheet/tab is where you will identify the specific Budget Calculator Default Values that are in use at your Post. If your Post uses a Default Value for a listed Budget Item that is different than what is specified, please update the existing value in the Default Value (in $) column. If there is a Category and/or Item Type that is used at the Post which is not already listed, please add it to the bottom of the list along with its Default Value (in $). If a Budget Item does not have a Default Value (in $), please enter 0.00 in the Default Value (in $) column. **NOTE**: all Budget Calculator Values are in US Dollars (USD, $).

This worksheet/tab contains the following data elements:

|  |  |  |
| --- | --- | --- |
| Data Element | Required/Optional | Description/Instructions |
| Category Name | **REQUIRED** | Name of a group of similar Budget Items. |
| Item Type | **REQUIRED** | Name of a specific Budget Item that has a cost value associated with it. |
| Default Value (in $) | **REQUIRED** | The initial cost value that is displayed for a specific Budget Item. If the indicated Default Value is different than what is used at your Post, please change the Default Value shown to the correct value in use at your Post. |

**Configuration Values**

This worksheet/tab is where you will supply Post or Agency-at-Post specific GTTS application configuration values.

This worksheet/tab asks for the following Configuration Values:

|  |  |  |
| --- | --- | --- |
| Configuration Value | Required/Optional | Defined As… |
| Courtesy Name Check Time  (# of Business Days): | **REQUIRED** | The number of **business days** that a Courtesy Unit has to complete their Courtesy Name Checks before returning their results back to the POL/Vetting Coordinator. |
| Courtesy Vetting Time  (# of Business Days): | **REQUIRED** | The number of **business days** that the POL/Vetting Coordinator has to process and approve/deny all of the participants within a batch before returning the batch results back to the Requester (Training Event Organizer/PM). |
| Leahy Vetting Time  (# of Business Days): | **REQUIRED** | The number of **business days** that the POL/ Vetting Coordinator has to process individuals for Leahy Vetting (in INVEST) and approve/deny all of the participants within a batch before returning the batch results back to the Requester/Requesting Agency (Training Event Organizer/PM). |
| Vetting Batch Size  (# of Participants): | **REQUIRED** | The maximum number of participants allowed in a single vetting batch (Leahy or Courtesy). |
| Notifications of Close Out Activities  (# of Business Days): | **REQUIRED** | The number of **business days** past an event end date before a notification to close the event is generated by the system and sent to the Training Event Organizer/PM. |
| POL Point of Contact Email: | **REQUIRED** | The email address (individual or Active Directory Distribution List) designated to receive all POL-related questions or inquiries. |

Additionally, this worksheet/tab asks that you identify any Training Event types in use at your Post that we may not have listed in the GTTS application. Currently, GTTS classifies Training Events as one of the following:

• Conference  
• Course  
• Logistics Support  
• Meeting  
• Mentoring  
• Mock Trial  
• Seminar  
• Study Tour  
• Workshop

Please let us know if there are any event types that you use at your Post that we may not be aware of.

**Transmitting the Completed Templates to the GTTS Team**

At this point, you will have entered all the information needed to onboard a Post into the GTTS. The completed file should be emailed to the GTTS Project Team at [GTTS-Support@fan.gov](mailto:GTTS-Support@fan.gov).

1. Create a new email message:
   1. TO: [GTTS-Support@fan.gov](mailto:GTTS-Support@fan.gov).
   2. FROM: your email address.
   3. SUBJECT: “New Post Onboarding User & Data Forms for” followed by your Post Name & Country Name.
      1. Example: “New Post Onboarding User & Data Forms for Mexico City, Mexico”
2. In the email body please include the following information:
   1. Your name and contact information in case we need to contact you about your submitted template file(s).
3. Attach the completed file to the email.

**Support Resources**

If you have any issues or need assistance, we are here to help. Please contact us via email at [GTTS-Support@fan.gov](mailto:GTTS-Support@fan.gov). In your email, please include the following information:

1. TO: [GTTS-Support@fan.gov](mailto:GTTS-Support@fan.gov).
2. FROM: your email address.
3. SUBJECT: “Problem with New Post Training Event Template”.
4. In the Email Body:
   1. Describe the issue you are having. Be as detailed as possible.
   2. Your name, contact information, and the best time to reach you if we need to contact you directly. If you are using a web communications service like Google Chat, Google Hangouts, or Slack, please include your related contact information for those services.
5. If you able to generate a **SysInfo** report and attach it to the email, that will provide us with all the technical information about your system that we need:
   1. Press **Windows**+**R** (Windows Key & R Key at the same time) to open the Run box.
   2. Type “msinfo32” into the “Open” field, then press **Enter**.
   3. You should immediately see the System Information panel.
   4. Click **File** on the menu bar and then select **Export …**
   5. Enter a file name and save the file to your desktop.
   6. It may take a couple of minutes for the file to be generated and saved.
   7. Attach the file to your email.
6. If you are not able to generate a SysInfo report, please include the following information in the Email Body:
   1. Operating System Name & Version.
   2. The version of Microsoft Office or Excel that you are using.