

Planning for Poses: A Look at Group Travel

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Risk Summit 2016



Agenda

- *Initial planning*
 - Identifying group travel on your campus
 - Lingo
- *Configuration*
 - Designing the right program(s)
 - Itineraries
 - Registering travel
- *Ongoing management*
 - Staff permissions and keeping everyone informed



Identify Travelers

- Which groups are traveling?
- How often do they travel?
- Do they have a set itinerary?
- How do they get into the system?
 - Do they register themselves?
 - Could they be batch imported?
- What information do you need to collect?
- Who needs access to the registration information?
 - Site administrator?
 - Travel coordinator?



Lingo

- Program = Trip
- Application = Registration
- Applicant = Registrant
- Questionnaire = Form
- OneStep = One-form submission (no save)



Configuration Options

- Add to your standard Travel Registry program
 - Registrants create their own itinerary
- Create separate program
 - Ideal for recurring group travel
 - Registrants inherit program-level itinerary



DEMO


Standard Travel Registration	Separate Program (Basketball Team)
Travel Registration	Register Now



Itineraries

- Used to determine when a registrant is actively participating in travel
- Program itinerary records
- Program Date Management Utility Stock Report

Program Date Record and Itinerary Management: Hide Tips

 This tool can be used to manage the program date records and program itinerary records in your program catalog. To see the current records, select the application cycle and programs using the form and click on the 'Search' button. This will bring up a display of all the programs fitting that criteria, their program date record (if there is one), and all the program itinerary records that are connected to that program date record. You can add/edit program date records and itinerary records using the edit pencil in the actions column. You can also batch create a program date records by marking checkboxes and clicking on the 'add date records to marked' button at the bottom of the page.

[Return to Admin Home](#)

Select Programs and Application Cycle :

Application Cycle:	Calendar Year 2016 ▾
Show:	<input checked="" type="radio"/> Active and Inactive <input type="radio"/> Only Active <input type="radio"/> Only Inactive Outgoing ▾
Program Groups:	<div>All Chelsey Harwood Diedre Van Zandt Kendall Frye Daniel Bullins Uncategorized</div>
Programs:	<div>All Basketball Team Travel - KF Service Learning in Argentina - DV Service Learning in Costa Rica - DV Service Learning in Ecuador - DV</div>

[< Cancel](#) [Reset](#) [Search >](#)



Tools for Registering

- Applicant Admin > New Application
- Batch Import Tool
 - Environment Settings > SCL should be 'Yes'
- Note: Import/Export tool does not send registrant notification

Application : New Hide Tips

Use the form below to search for a applicant record from within your system. Once you find the applicant you wish to create an application for, click the "Add" button next to their name.

Search **Batch Import**

Applicant Search

To find TDU applicants, enter a first and/or last name and/or email address:

Keywords:

Login ID:

Enter the unique identifier value for the applicant you wish to add. Note that the ID may not be the login username of the applicant. This installation uses as the key column.

< Cancel **- Reset -** **- Search >**

Directory to Search: ☒ SIS ☐ HR
☐ Non-processed applicant

New Applicant

In addition to searching for an existing applicant, you may also add a user with the form below:

Email:

< Cancel **- Reset -** **- Add >**

☐ Non-processed applicant



Staff Permissions

Add Group		User/Permission Search
Manage User Groups		
Group Name		Actions
Facilitators		  
Recommenders		  
Reviewers		  

- Setting permission groups
 - Default:
 - Facilitators
 - Reviewers
 - Recommenders
 - Get creative:
 - Directors: can look up applicant info, can view shared queries and reports
 - Faculty led: updates their specific program only
 - Data Access Object Restriction
 - Program restriction for separate program
 - Parameter restriction for standard travel registry

Principal/Dependent Relationships

- System Settings > System Features > Process Options
- Principal registration has access to all cohort information

Henry Coach

Program:	Basketball Team Travel - KF
Term/Year:	Calendar Year, 2016
Deadline:	12/31/2016
Dates:	02/08/2016 - 03/30/2016

■ 1 linked records exist ([View](#))

Dependent application records			
Name	Program	App Cycle	Actions
Frye, Kendall	Basketball Team Travel - KF	Calendar Year, 2016	View
Smith, Haley	Basketball Team Travel - KF	Calendar Year, 2016	View
Watts, James	Basketball Team Travel - KF	Calendar Year, 2016	View

Close



Keeping Everyone Informed

- Query watch ideas
 - Daily list of new registrants that are emailed to faculty leaders, department heads, or other people on campus
 - Application tags for separate programs
 - Notifications about withdrawn applications
- Reports
 - Good way to keep people informed without having them log in
 - Annual Audits - Principal/Dependent
 - Providing rosters



Useful Resources

Program Types

<https://tdsupport.force.com/support/articles/General/Program-Types>

Managing Staff Permissions

<https://tdsupport.force.com/support/articles/General/Managing-Staff-Permissions>

Principal/Dependent Applications/Profiles

<https://tdsupport.force.com/support/articles/General/Principal-Dependent-Applications-Profiles>

Wednesday, January 13, 9:00 AM

Working Together with Control: Using Fine-Grained Permissions in Terra Dotta Software

