Planning for Posses: A Look at Group Travel

Presenter: Kendall Frye 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

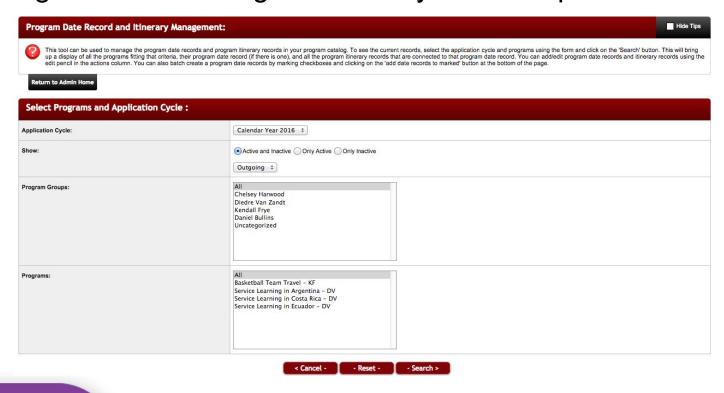
- Add to your standard Travel Registry program
 - Registrants create their own itinerary
- Create separate program
 - Ideal for recurring group travel
 - Registrants inherit program-level itinerary

DEMO

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

Itineraries

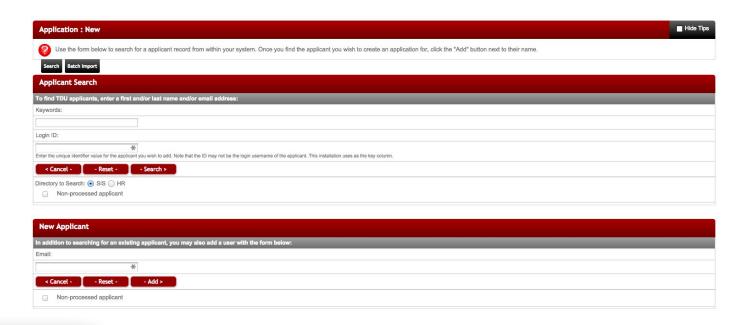
- Used to determine when a registrant is actively participating in travel
- Program itinerary records
- Program Date Management Utility Stock Report





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





Staff Permissions



- 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





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