# Who's in Charge? Travel Approval System Management

Presenter: Kendall Frye Risk Summit 2016

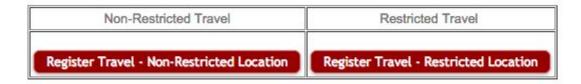
# **Agenda**

- Initial planning
  - Key Question: If someone at your institution wants to travel to a restricted location, what do they have to do? Do they need an approval?
- Configuration options
  - 2 separate programs
  - Travel Warning RSS feed
- Notifications and reports
- Approval processes
  - Reviewer functionality
  - Workflow



## Restricted vs. Non-Restricted Travel

- 2 separate programs
  - Non-Restricted locations
    - Risk Management, OneStep
  - Restricted locations
    - Risk Management
    - Approval Process
- Registrant self-selects



# **Travel Warning RSS Feed**

http://feed.mikle.com

state.gov



#### travel.state.gov: Travel Warnings

#### **Ukraine Travel Warning**

The Department of State warns U.S. citizens to defer all travel to Crimea and the eastern regions of Donetsk and Luhansk, and recommends those U.S....

Dec 14, 2015 7:29 PM

#### **Burundi Travel Warning**

The U.S. Department of State warns U.S. citizens against all travel to Burundi and recommends that U.S. citizens currently in Burundi depart as soo...

Dec 13, 2015 12:02 AM

#### Lebanon Travel Warning

The Department of State urges U.S. citizens to avoid all travel to Lebanon because of ongoing safety and security concerns. U.S. citizens living an...

Dec 11, 2015 11:13 PM

#### Mali Travel Warning

The Department of State continues to warn U.S. citizens of the risks of travel to Mali. This Travel Warning also reminds U.S. citizens that on Dece...

Dec 7, 2015 2:52 PM

#### **Democratic Republic of the Congo Travel Warning**

The Department of State warns U.S. citizens of the risks of travel to the Democratic Republic of the Congo (a.k.a. DRC or Congo-Kinshasa). U.S. cit...

Dec 4 2015 9:31 PM

tSS Feed Widget

## **Notifications**

What happens if someone self-selects the wrong program initially?

- Query Watch notifications
- Change program
- Starter Kit: Query and Report Examples
  - Wednesday, January 13th, 10:45 AM

## **Approval Processes**

- Reviewer functionality
  - Standard group of reviewers
- Workflow
  - Standard group of reviewers

### **Useful Resources**

Administrative Task: Workflow

https://tdsupport.force.com/support/articles/General/Administrative-Workflow

**Reviewer Perspective** 

https://tdsupport.force.com/support/articles/General/Reviewers-Perspective

Starter Kit: Query and Report Examples

10:55 - 11:35, Tryon Room