Still Herding those Darn Cats:

Developing Your Travel Registry using
Terra Dotta Software

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What's the goal?

- To develop a functioning travel registration program in your instance of Terra Dotta software

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What's the point?

- A travel registry program enables you to:
  - Update your travelers via email, batch email, or SMS text messaging
  - Locate your travelers in the event of an emergency
    - Suggested session: Risk in Real Life
  - Report data about your travelers to campus leadership
  - Fulfill Duty of Care obligations

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Well, how do we get there?

- Overview the best program types for travel registration

- Design a program that meets travel needs

- Apply as a student/process as an administrator

- Run a search/report

Which program type should I use?

- Travel Registration

- Risk Management

- Outgoing with Sidetrip and OneStep

Travel Registration

- Used to create programs where the registrant's itinerary needs maximum flexibility throughout the life-cycle of the registration. Common examples:
  - Travel Registration
  - Site visit
  - Off-campus travel
  - Conference attendance

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Risk Management

- Used to register travel in which the registrant is reporting their destination, departure date, and return date at the time they create their registration. Common examples:
    - Research Trip
    - Faculty Travel

Outgoing with Sidetrip and OneStep

- An evolution of the outgoing program type that enables registrants to create additional itinerary records once they are accepted to the program. Common uses:
  - Study abroad programs
  - Faculty-led programs

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How do I install a program type?

- Visit Program Admin > Program Types
- Click the Browse TDCL button
- Click the install program type button under the actions column for the program type of interest

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Let's Demo!

- Build a program using the program type "Travel Registration"

- Register travel as a student

- Update the student's record as an administrator

The building blocks

- Program Admin > Create New
- Name the Program
- Select "Travel Registration" as the Program Type
- Change the default status to whatever you deem appropriate
  - For today, "Accepted"

The building blocks cont.

- Go to the program builder
  - Program Admin > Search or Program Admin > List All
- Add Term(s)
  - Terms tab
- Add Date(s)
  - Dates tab
- Brochure tab
  - Add brochure information as needed

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Setting up a OneStep

- Visit the OneStep tab
- Enable OneStep via checkbox
- Determine whether or not the registrant is logged out after submission
- Select the term you wish to use
- Is proxy registration right for your program?

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What are your requirements?

- Keep it as simple as possible:
  - Questionnaires
    - Gather information
  - Materials
    - Waivers and signatures of understanding
  - Learning Content
    - Keep people updated and informed
  - Assessments
    - Make sure they know what's happening

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Why all that Data?

- Reporting to your institution
  - Keeping campus leadership up to date (See: Happy)
  - Find out who is traveling
  - Demonstrate compliance
  - Report incidents

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Resources

- Knowledgebase Articles:
    - Program Types: https://tdsupport.force.com/support/articles/General/Program-Types?popup=true
    - Program Type – Travel Registration: https://tdsupport.force.com/support/articles/General/Program-type-Travel-Registration?popup=true
    - Program Type – Risk Management: https://tdsupport.force.com/support/articles/General/Program-type-Risk-Management?popup=true
    - Program Type – Outgoing with Sidetrip and OneStep: https://tdsupport.force.com/support/articles/General/Program-type-Outgoing-with-Side-Trips-and-OneStep?popup=true

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Q&A

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