

# The Broad View: Capturing All Campus Travel

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# Agenda

- *Step 1: Initial planning*
  - Identifying the travelers
- *Step 2: Configuration*
  - Designing the right programs
- *Step 3: Ongoing management*
  - Staff permissions and keeping everyone informed
- *BONUS: Food for thought*
  - Multiple Licenses



# Identifying the Travelers

- Who's traveling? Where are they going? Why are they going? → Make a list for yourself, know the individuals/ groups and reasons for every trip you need to track.
- Who approves these trips? Who needs access to the system? Who's contacted in emergencies? → Make a list of people or departments.



# Designing the Right Programs

- Group travel – Registrants don't touch
  - Use cases:
    - campus organization or class is attending a conference
    - a sports team has a season worth of travel ahead
  - Strategy: Data import tool to load information into system for existing Risk Management or Travel Registration program

# Designing the Right Programs

- Proxy Travel
  - Use cases:
    - Secretary or assistant registers faculty travel
    - Admin users register information given to them in another medium: paper, other system, etc.
  - Strategy: use the Travel Registration with OneStep program type, enabling proxy registrations

Proxy Registration

☒ Enable proxy OneStep registration for this program


Generate HTML for this button:

```
<input type="button" class="button" onclick="location.href='index.cfm?FuseAction=OneStep.ProxyApply&Program_ID=11431'" value="Register Now" />
```

Copy the button HTML code above into your custom pages to provide users with a quick means of OneStep registering for this program.

Proxy is logged out after submission ☒ Yes ☐ No

☒ Open proxy registration (no admin permission requirement)

 You have chosen to enable open proxy registration. Please note that this allows any logged-in user (including non-administrators) to create profiles and registrations for anyone in your SIS and HR lookup directories.



# Designing the Right Programs

- Student travel
  - Use cases:
    - Traditional Study Abroad
    - Side trips
    - Attending a conference or other offsite visit
  - Strategy:
    - If they need to “apply”: Use the Outgoing with Sidetrip program type, which allows them to add to their itinerary
    - If they need to “register”: The Travel Registration program allows them to update their itinerary as much as needed



# Designing the Right Programs

- Faculty Travel

- Use Cases:

- Presenting at or attending a conference
    - Research expedition

- Strategy:

- OneStep forms with proxy enabled
    - Compliance strategies in application instructions
    - Take advantage of reminders for bigger applications

## Reminder Preview

Following is what the user will see when you send out registration reminders. Note that all items underlined in italics represent sample information:

This email is in regard to your registration for Program Name  
for the term Term, Year.

Following is the list of materials that are needed for further processing of the registration cycle process:

#1.) Registration material 1...  
#2.) Registration material 2...  
#3.) Registration material 3...  
#n.) Registration material n...

-----  
This message was automatically generated.  
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Close Window



# 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 programs only
    - Program proposal review panel: reviews program for submitting program proposals and those submissions
    - Groups based on departments: examples include French or history having access to their specific programs and applicants

Manage User Groups	
Group Name	Actions
Facilitators	  
Recommenders	  
Reviewers	  





# Keeping Everyone Informed Always Every Time Constantly

- Query watch ideas
  - Daily list of new applications that are emailed to advisors or certain people around campus
  - Hourly notifications about withdrawn applications
  - Weekly emails for program reviewers with lists of complete applications for their programs
  - Notifications to department heads about:
    - Students applying to their programs
    - Faculty entering the While Abroad phase
    - Faculty entering the Returnee phase
    - Incident reports that are filed



# Keeping Everyone Informed Always Every Time Constantly

- Benefits of reports
  - Good way to keep people informed without having them log in
  - Gives an idea of who's traveling and when (demographics, departments, numbers and percentages that the institution can use)
  - Demonstrate your compliance



# Multiple Licenses

## ■ Drawbacks

- Fees: depends on model you select, but potential costs include integration, hosting, license, maintenance, and any custom actions you require

## ■ Benefits

- Fewer cooks in the kitchen means your “stuff” is less likely to be messed with
- Language in the text interface
- Access to sensitive data is limited
- More streamlined = more compliance
- Data in reports is only relevant to your office