

TDU RISK SUMMIT

CHARLOTTE, NC • JANUARY 18-20, 2015

New User Workshop



TERRADOTTA

New User Workshop

- Part 1
 - Building and developing your system
- Part 2
 - User experience
 - Processing registrations
 - Creating Queries and Reports



New User Workshop

- Presenters
 - Mark Landon
 - Chelsey Harwood
 - Isaiah Allekotte



New User Workshop

- Q&A before the mid-workshop break and afterwards



New User Workshop

Getting Started



Terminology

Since Terra Dotta software is used in a variety of settings, the default terminology may not always exactly suit your needs.

The Terra Dotta software is very flexible in regards to terminology and allows you to change text as you see fit.



Definitions

TDS:

Terra Dotta Software



Definitions

- *Program*
 - You define
 - As many as you want
 - Its what the registrants apply to
 - Usually different programs for different types of travel or different types of registrations
 - Each program can have its own process and configuration



Definitions

- *Applicants/registrants*
 - The people who register/apply to programs
 - Can be internal or external
 - Internal users are often tied to your campus SIS or HR system through integration

- *Application/registration*
 - *The record created when an applicant applies/registers*
 - *An applicant can have one or many applications*



Definitions

- *Process elements*
 - *The pieces of the registration*
 - *You define*
 - *Includes*
 - *Questionnaires (forms)*
 - *Signature documents*
 - *Material submissions*
 - *Learning content*
 - *Assessments*



Main Steps in Configuring TDS

- *Define data structures*
- *Create public website*
- *Create programs*
- *Create process elements*



What are Data Structures

- *‘Building blocks’*
- *Pieces of data about a program, an applicant, or an application*
- *You define*
 - *What they are*
 - *What values they can have*
 - *How they are formatted*



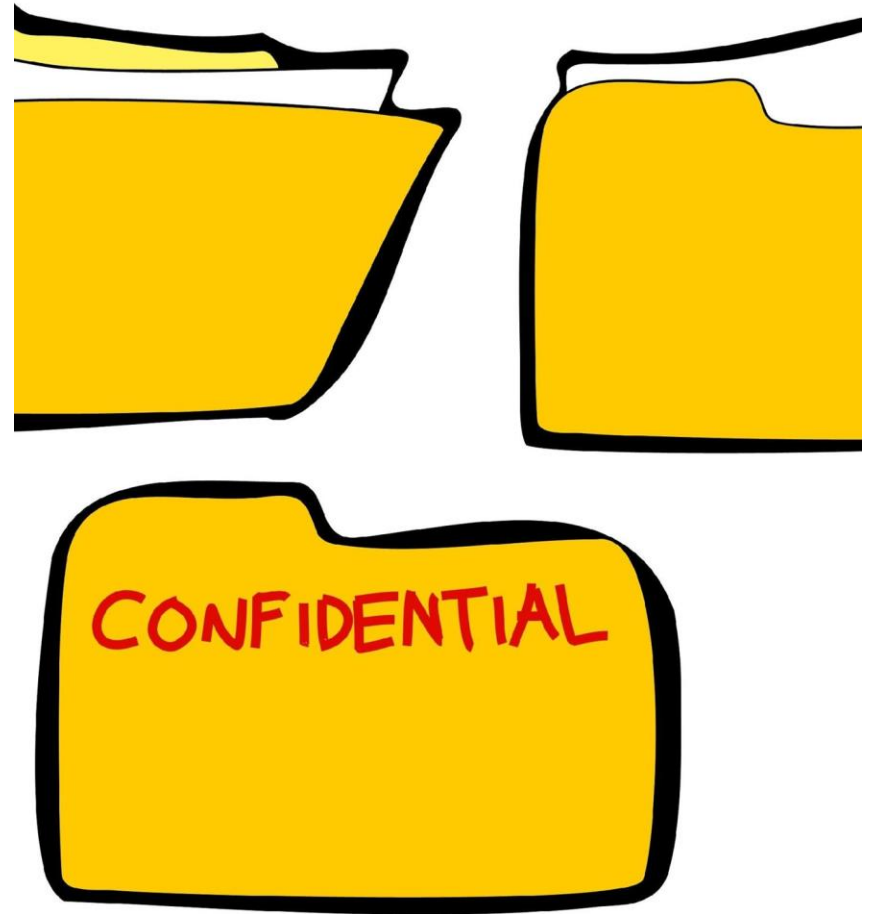
Why Data Structures

Data field

- What information?
- What are my options?

Data consistency

- validity
- accuracy
- integrity



Data Structures

- *Program attributes*
 - *Relate to programs*
 - *Include*
 - *Locations*
 - *Terms*
 - *Custom program parameters*



Program Attributes: Locations

Program and traveler destinations

Can be pre-defined, or created on the fly

- Single location
 - City
 - Country
 - Region
 - Latitude / Longitude



Program Attributes: Terms

Recurring period of participation

- Will usually be calendar year for travel registration, study abroad would use terms like “fall, spring, summer, etc.
- The Label is the only significant field

No calendar dates involved yet



Applicant/Registrant Parameters

- *May be from SIS/HR system, applicant-entered, administrator entered, or a combination of these three methods*
- *Core data*
 - *First Name**
 - *Last Name**
 - *Unique Identifier (Username)**
 - *Email**
 - *Date of birth*
 - *Gender*
- *Unlimited Custom applicant parameters*

**Required*



Applicant/Registrant Parameters

Applicant/Registrant Parameters are Registrant, not registration, specific



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Public Website



Content Management System

CMS

- Built-in website builder
- External website

Functional pages

- Brochure, deadlines
- Staff pages, appointment system
- Login portal



Layout

Skin / theme / look and feel

- Terra Dotta software stock layout
 - Colors and headers editable through built-in utility
- Custom layout
 - Template and documentation available



Document Center

Useful repository for files and information

- Commonly distributed
- Frequently updated
- Internal documentation

Easily linked to

- Via WYSIWYG
- Direct URL



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Programs



Program Types

Program Types

- Outgoing
- Risk management
- Travel registration
- Incident reporting
- Program enrollment
- Outgoing with side-trips and one-step
- Incoming
- Scholarships



Program Types for Risk Management

- Risk management
 - Commonly used when the user needs to simply provide dates and locations that won't change
- Travel registration
 - Used when user needs to provide dates and locations that may need to be updated
- Incident reporting
 - Allow students, faculty and staff to file incident reports



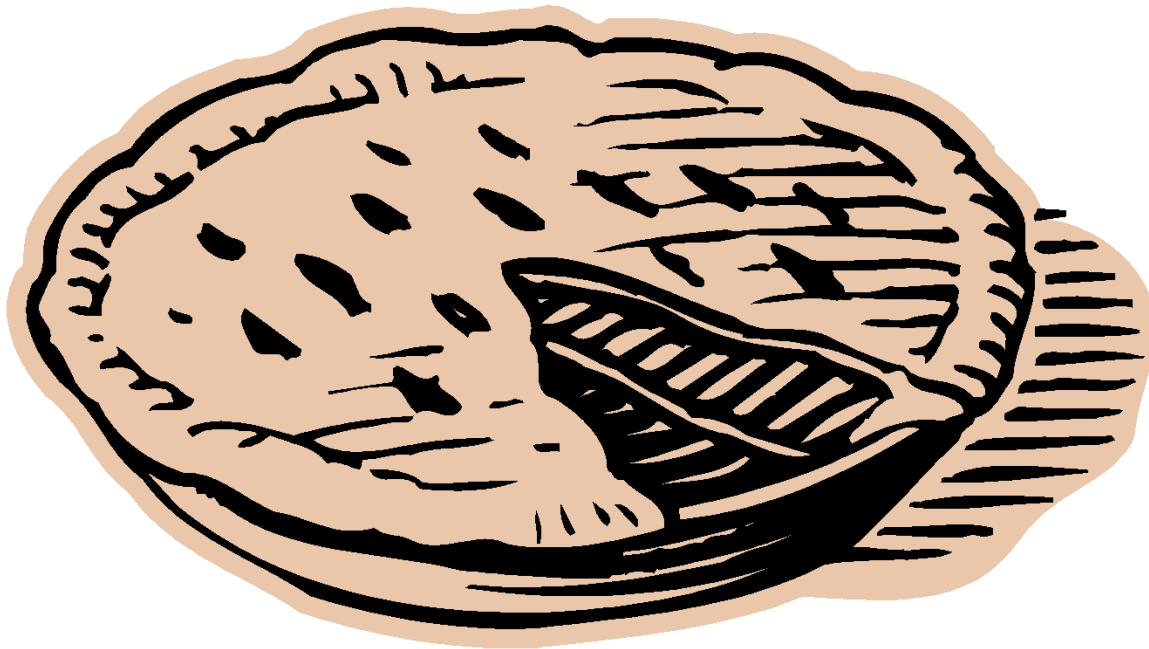
One-step vs. Standard Programs

- One-step registrations
 - Many risk-programs will use one-step
 - One step allows the user to complete the registration quickly in one session
 - Can contain questionnaires and signature documents
- Standard Registrations
 - Can be completed in one or multiple sessions
 - May also include material-submissions, learning content, assessments
 - Is used when approval is required



Creating a New Program

Creating a new program is easy as....



Program Builder

Program builder tabs – top priority

- General
- Brochure
- Terms
- Itineraries
- Settings
- One-step



One-Step registrations

- Allows registrants to complete registration in one session
- Can include questionnaires and signature documents
- User receives an email confirmation
- Proxy registration can be enabled

Approval Processes

- Other program types allow for more direct involvement and approval from your office
- A Risk Management program can be used to collect proposed travel information, and then an administrator can approve or reject the proposal



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Itinerary Records



Itinerary Records

- Applicant itinerary records are the key to knowing when someone is abroad, and where they are
- Applications can have one or more Itinerary Records
- Each itinerary record consists of a pair of dates and a single location
- Application itinerary records sometimes flow from program itinerary records

Applicant Itinerary Records

- How do applicant itinerary records get created?
 - Created by registrant
 - Created by administrator
 - Inherited from a program if the program has a set itinerary

Itinerary

Please select the arrival and departure dates for each destination in your itinerary. After selecting the dates and location, click on the 'Add to itinerary' button.

Current Itinerary:

Arrival Date:	<input type="text"/> (Format: mm/dd/yyyy)
Departure Date:	<input type="text"/> (Format: mm/dd/yyyy)
Location:	<div>Find location: <input type="text" value="enter city name here to find location"/></div> <div>London, United Kingdom (Europe) Manipal, India (Asia) Melbourne, Australia (Australia/Pacific Islands) Nagoya, Japan (Asia) Nairobi, Kenya (Africa) Paris, France (Europe) Sao Paulo, Brazil (South America) Tokyo, Japan (Asia) Various, Various (Various)</div>
<input type="button" value="Add to Itinerary"/>	



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Online Registration Process



Process Elements

Materials

- Material submissions
- Signature documents

Questionnaires

- Registrant-completed forms
- Staff-completed forms

Learning content

Assessments



Configuration

- To whom
- When
- Conditional deployment
- Program/term/parameter-specific



Materials

Two Types

- Material submission
 - Something the applicant needs to turn in or do
 - Admin checks it off as complete
- Signature documents
 - Signed electronically by registrants
 - Can require identity verification



Questionnaires

2 step process

- Create question items
- Build questionnaire with question items

Question item types

- Controlled answers (single/multi-selection)
- Free form answers (field, short answer, essay)
- Yes/no questions (optional explanation)



Learning Content

- Similar to materials
- Can include embedded videos, links, documents, images and text
- Applicant marks as read



Assessments

- Configuration of attempts and scoring
- Assign question bank deployment method
- Build multiple-choice questions to use



Activating Process Elements

- New process elements not automatically deployed
- Application cycles use process maps to decide which process elements and versions are used



Terra Dotta Community Library

- Repository of process elements to be downloaded
- Imported content can be edited
- Process elements can be shared back to TDCL



Coffee Break



New User Workshop: Part Two

Processing registrations

- How registrants complete registrations
- How administrators review registrations

Generating exports

- Queries
- Reports



New User Workshop: Part Two

Advanced topics

- Change management
- Permissions
- Text Interface



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Registration lifecycle



Registration Cycles

Term + year = app cycle

Example: Travel Year + 2015 = Travel Year 2015



Registration Phases

Four registration phases

- Pre-decision
 - Post-decision
 - Abroad
 - Returnee
-
- Risk programs often skip 'pre-decision'



Application Dates

Application deadline

- Last day to start an application
- Pre-decision process elements due

Decision date

- Day on which applicants enter post-decision
- Rolling admission when in the past



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Registrant experience – travel
registration (one-step)



One-Step Registration

- Registrant follows a link to the registration page
- Enters itinerary record(s)
- Provide required information
- Accepts electronic signature documents
- Submits registration
- Receives confirmation by email
- The registration is complete



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Registrant experience – Travel approval



Pre-Decision

- Program selection
- 'Apply now' button
- Provide required information
- Registration page checkboxes



Decision Notification

- Email notification when entering next phase
- Decision letter displayed



Post-Decision

- New process elements displayed
- Reminders start on the pre-determined date after decision date
- Once approved, registrants cannot withdraw their own registration



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Registration Processing



Registration Search



Registration search

- By name
- By registration type
- By travel dates
- Withdrawn applications filtered out by default



Process Elements

Process elements

- Materials
- Questionnaires
- Learning content Pages
- Assessments



Status Tab

- Recording status changes
- Changing a registration's program and/or app cycle
- Extending a registration's deadline
- Non-processed registrations



Activity Tracking

History log

Tracks all actions impacting the registration

- Who
- What
- When

Email / comments

Logs all email sent to the registrant

- By staff
- By automated notification



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Queries



Queries: What are they?

A way to pull a selected group of registrations together to look at and do things with

- Simple
- Advanced
- Locator search
- Profile search

Advanced Search

Step 1: Choose which category of filters to use

- Registration parameters
- Program parameters
- Registrant parameters
- Complete/incomplete submissions
- Questionnaire responses

Advanced Search

Step 2: Select the criteria in each category to use for your search

- Selecting values in multiple boxes uses 'AND' logic
- Selecting values within a single box uses 'OR' logic



Advanced Query Options

Many options available from search results page

- Send an email or SMS message to the group
- Batch processing of registrations in the group
- Reporting options



Saving/Editing/Sharing Queries

Save a query

- Saves the time needed to rebuild it
- Updates itself each time you run it

Edit a query

- Corrects a mistake without starting over
- Adjusts to changing circumstances

Share a query

- Provides targeted information to people
- Can be shared to specific staff members or groups

Locator Search

Locator search

- Searching for registrations based on start and end dates and radius from an address



Profile Search

Profile search

- Searching for users rather than registrations



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Reports



What is a report?

Exporting data from the application search results

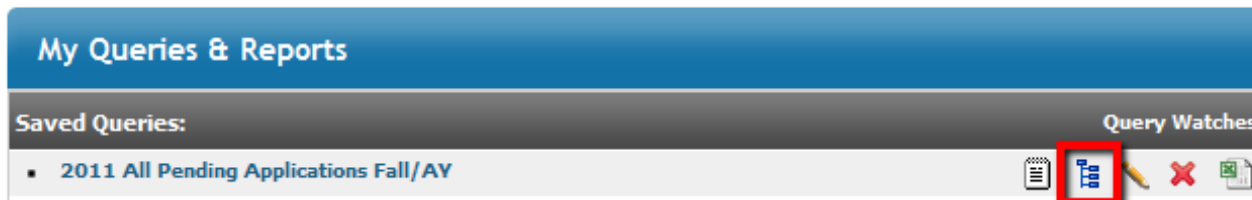
The query gets the applications and the report will indicate the output columns, groupings, and other information to be displayed



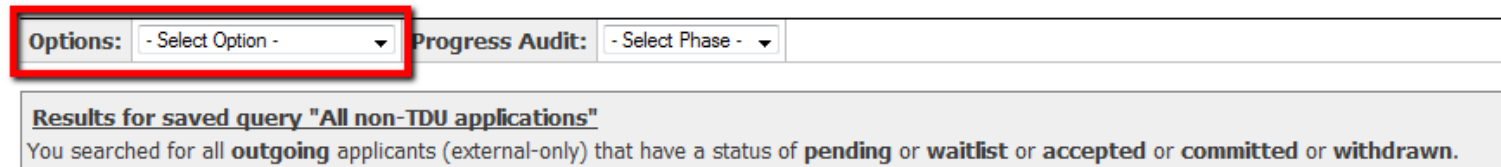
Accessing the Report Wizard

Two locations

- Admin Home → My queries & reports panel



- Query results screen: options → create report



Report Wizard

- Groupings
- Output columns
- Output format
- Saved reports just like saved queries
- Saved reports can also be shared



Mix and Match

Saved queries and reports are interchangeable

- Saved registration queries can be executed with any saved registration reports
- Saved profile queries can be executed with any saved profile reports



Stock Reports

- iSOS
- HTH Worldwide
- STEP Registration
- Itinerary Stock Report



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Advanced Topics



Change Management

Updating site content

- Public site pages
- Program brochure/dates

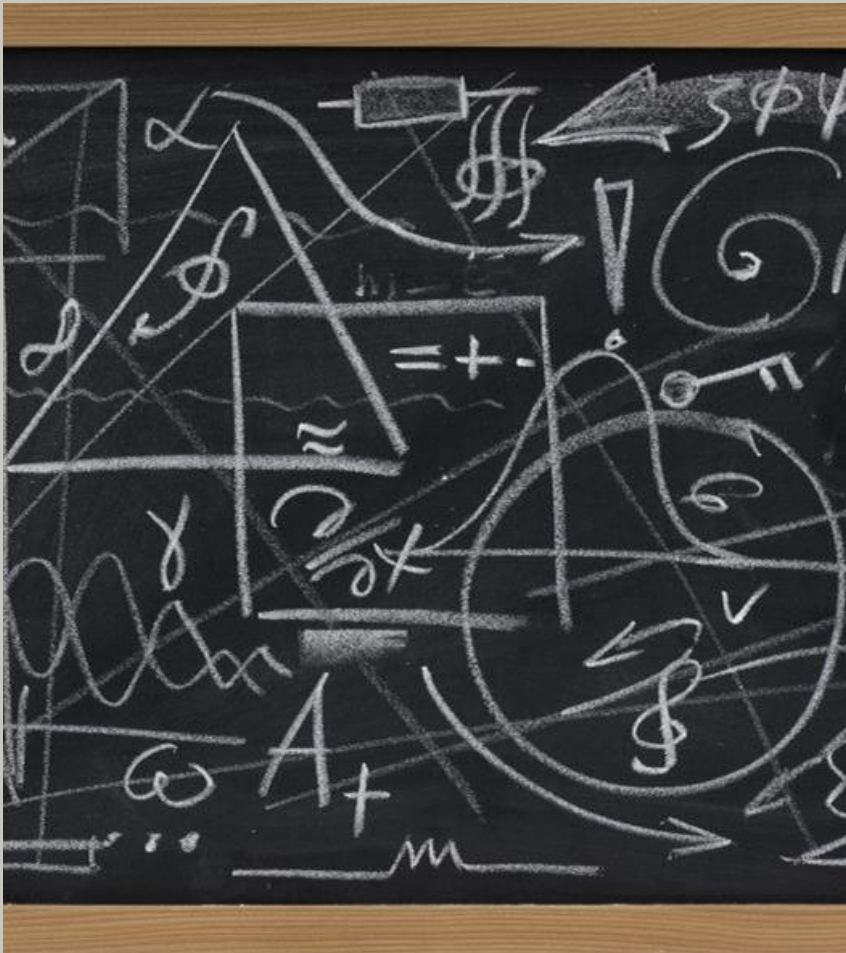
New version release

- Update procedures
- Implementing new features

Changes to the online application process



Process Version Management



- New process elements
- Changes to existing process elements
- Removal of process elements

Each registration cycle has a process map



Process Map

Which version of which process elements
Maintains legacy data

New versions

- Created when editing a process element
- Can be cascaded out to process maps
- Best done before registration cycle is active

Process elements are never deleted – only retired

Staff Permissions

Two ways of granting access

- Permission group assignment
- Individual user assignment

Custom permission groups can be created

Data access objects act as filters to registrations, programs, and profile data

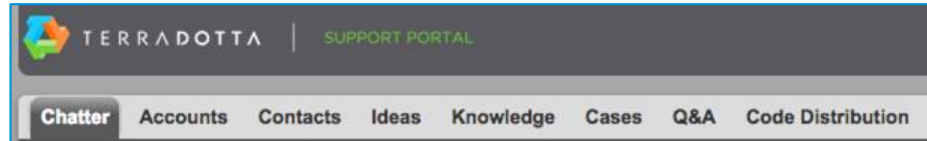


Text Interface Tool

- Maintenance → Text Interface
- Requires permissions
- Program-type specific
- Search by keyword
- Search by Identifier
- “&Markers” lets you find identifier



Additional resources



- Terra Dotta support portal
 - Knowledgebase
 - Case system
 - Forums
- Webinars
- TDU 15 Conference



Thanks!

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