TravelSafe: Introduction to Department Manager Functions

Gena Burke - 2023-04-18 - Comments (0) - Accounts and Passwords

TravelSafe Department Manager Role

With "Department Manager" status in Brown's Global TravelSafe, you will be able to view all travel plans associated with your department. You will also be able to create travel plans on behalf of others in your department. Finally, you will be able to manage travel groups in your department, to more narrowly capture specific sets of travelers.

Searching for and Viewing Travel Plans

In TravelSafe, click on "Travel Plans" in the top menu. This screen will show you all travel plans that are associated with departments you manage. There is also a search filter interface at the top of this screen where you can narrow the results. The list of plans will give you a summary of the traveler name, travel dates, and countries visited. To view a travel plan in detail, click the "View" button in the "Actions" column.

Acting on Travel Plans

In addition to searching and viewing plans, there are three other actions you can perform on the Travel Plans list screen. All of these are accessed via the "Actions" menu above the list. To email travelers or bulk assign them to a travel group, you must first check the box in the table next to each plan whose traveler you want to work with. To email travelers, click Actions > Email Selected Travelers. You will be presented with a window where you can enter a subject and body for your message, as well as enter any additional email addresses you want to send the message to. Note that while this is presented as a standard email, TravelSafe will send a separate message to each recipient. Recipients will not be able to see who else received the message. To bulk assign travelers to a group, click Actions > Bulk Assign Travel Group. You will be presented with a simple search interface. Enter some portion of the group name, click on the group you want when it appears, and click "Confirm".

Creating a Travel Plan for another user

 If you want to create a travel plan for another user, go to the Travel Plans screen and click Actions > Create Travel Plan. This will take you to the Travel Plan edit screen. The first thing you should do is enter the traveler's name and click on it when it appear on on the menu. This will automatically populate the email for that traveler. You can then proceed editing the Travel Plan the same way you would your own, with one important exception. Only the traveler may agree to the Acknowledgements. There is a button on the Acknowledgements tab to prompt the traveler to do this, and you should click on that when you feel it is ready for the traveler to view.

Travel Groups

 If there are people in your department traveling together, you may create a Travel Group in order to more easily find them all. To do this, go to Travel Groups in the menu and click "Add Group." The Group Name and Department are both required, but the rest of the fields are optional. If you elect to specify a Lead, enter the person's name a click on it when you see it on the menu. Leads must be a member of the Brown Community. Once you have created a travel group, it will be eligible for travelers to select, or you may assign them via the "bulk assign travelers to a group" function on the Travel Plans screen.