

TerraDotta (StudioAbroad) User Guide

for GEO Partner Institutions

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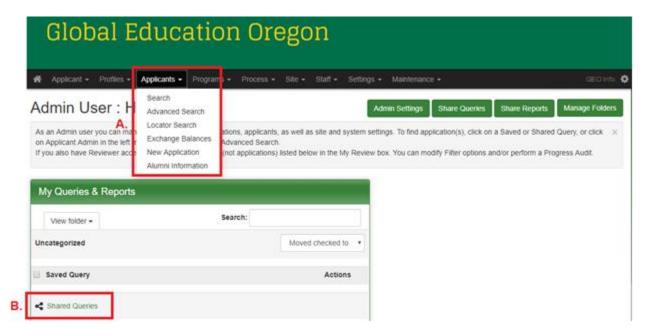
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Accessing the GEO Application System

The GEO application system site is located at <u>intlsa.uoregon.edu</u>. Click "Non-UO LOGIN" in the upper- right hand corner of the home page to log in with your GEO username and password.

If you are a new user, you will receive a temporary password from <u>geoinfo@uoregon.edu</u> after you are added to the GEO portal. The temporary password is valid only for 14 days. You need to set your permanent password within 14 days.

Once you have logged in you will land on your admin home page.



You will see various sections on your admin home page.

- A. **Top navigation menu:** This is where you can search for applications through the simple search, advanced search, or locator search.
- B. **Shared Queries panel**: Queries shared by GEO can be found in Shared Queries section under My Queries & Reports.

Queries

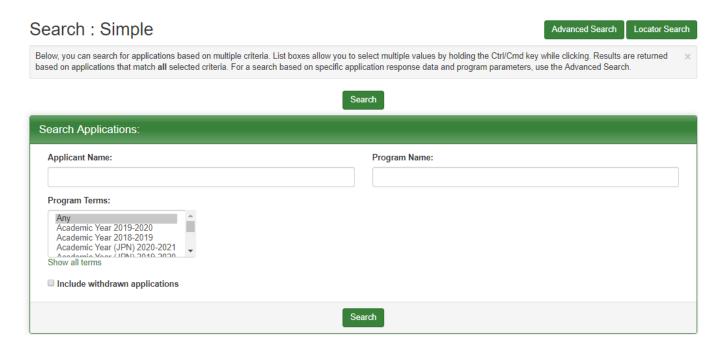
A query is the result you get when looking for a specific group of applications. You can run a query by going to the Simple Search or Advanced Search options under **Applicants**. Your query can be as simple as 'who is studying abroad in Fall Semester 2019' or as advanced as 'who is a female, majoring in Biology that studied abroad in 2018.'

Searching for an application

The search interface provides a great variety of search criteria, permitting the administrator to filter all the applications to a view that can be saved as a query. You have access to the profiles and applications of users that are currently enrolled at your institution.

Simple Search

- Go to Applicants -> Search
- Enter part or all of an applicant's name in the 'Applicant Name' field in order to bring up a list
 of search results.
- Enter part or all of a program title in the 'Program Name' field in order to bring up a list of search results.
- When you have finished selecting your search terms, click 'Search' and the page displays the applications that fit the criteria you requested.



Note: If you enter more than one word in the search field, the system will use an '**OR**' search logic for that field. For example, if you enter the words Ben Smith in the Applicant Name field, the system will bring up all applications with the name Ben as well as all applications containing the name Smith. To search for an exact name, put double quotes ("Ben Smith") around the name and it will bring up only

applications that have those exact words.

The 'Program Terms' list box enables you to select specific application cycles in which to search. You can select multiple application cycles by holding the Command/Control key as you click each option.

Collectively, the three main options in the simple search use 'AND' search logic. If you enter 'Ben' into the 'Applicant Name' field, 'Germany' in the 'Program Name' field, and 'Summer 2019' into the 'Program Terms' box, the system will bring up only the applications that meet all of these criteria.

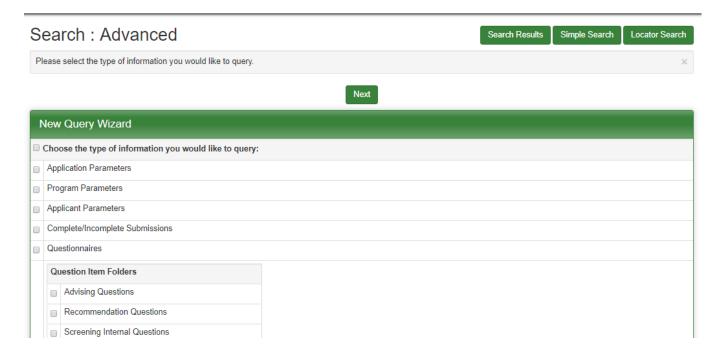
By default, the Simple Search does not include applications that have been withdrawn. If you wish to include withdrawn applications in your search, you must check the box next to 'Include withdrawn applications' to enable this option.

Note: If you do not provide any keywords, the search displays all the active applications from your institution in the system.

Advanced Search

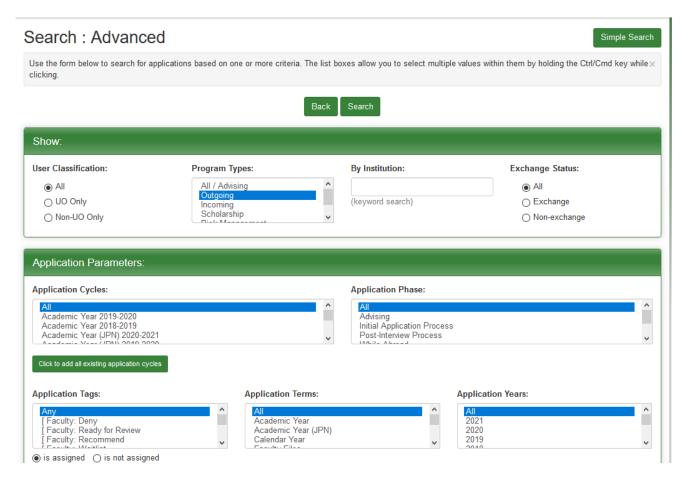
The Advanced Search works on the same principle as the simple search, but it allows you to search for very specific criteria.

Go to Applicant Admin -> Advanced Search. From this page, a list of options with a checkbox to the left of each one is displayed. If you wish to use one of these options as a filter for your search, select the checkbox next to it.



You can select multiple options. After selecting filter types, click **Next**. The next page that appears contains list boxes that you can use to select your criteria for the search.

If there is a list box with an option that you wish to search for, select the list box to search with that option. You can make multiple selections in a list box by holding down the **Command/Control** key when you click the additional options. If you do not change the option in a list box and leave the default selection of 'any', it is not used as a search filter.



You can restart your search and select new parameters by clicking **Back**. This takes you to the Advanced Search page.

Parameters Available

The options are grouped under various parameter titles. The available groups are:

- Show Parameters These options enable you to view applicants belonging to a particular group. The options are the following:
 - User Classification- Select Non-UO applicants, or all applicants as your students are grouped under.
 - o Program Types Leave as is ("Outgoing").
 - o Institution Leave this field blank.
- Application Parameters These options enable you to list the applicants based on the details of their
 application and the program they have selected. The options available are the following:
 - Application Cycles Select the application cycle to which the applicants belong. NOTE: By
 default, the list only includes the previous, current, and future application cycles. If you wish to include all

existing application cycles, you must click "Click to add all existing application cycles".

- o Application Phase Select the phase in which the application is currently present. For example Initial Application Process, Post-Interview Process, and so on.
- o Application Status Select the appropriate status of application.
- Application Terms Select the appropriate application term, not specific to a year.
- o Application Years Select the year in which the application was processed.
- o Application Activity Provide the dates of various activities regarding the application.
- o Program Select the name of the program to which the applicant belongs. NOTE: This list may include programs that are not applicable to your students. Please select an appropriate program to narrow your search.
- o Program Groups Leave it as is
- o City Select the city in which the program is provided.
- o Country Select the country in which the above selected city is located.
- o Region Select the region in which the country lies.

IMPORTANT: When selecting a city, country or region as a search criteria, please check the "Include Program Locations" box to ensure an accurate search.

- **Program Parameters** These options are not applicable at this time.
- **Applicant Parameters** These options enable you to search applications based on applicant parameter values.
- Complete/Incomplete Submissions These options enable you to search for applications depending on complete or incomplete submissions of signature documents, questionnaires, and so on.

The Complete/Incomplete Submissions search criteria use "AND" logic within and between the drop down boxes for the various process elements. This means that the query will pull only those applicants who have complete/incomplete status for EVERYTHING you select, not ANY of the options you select.

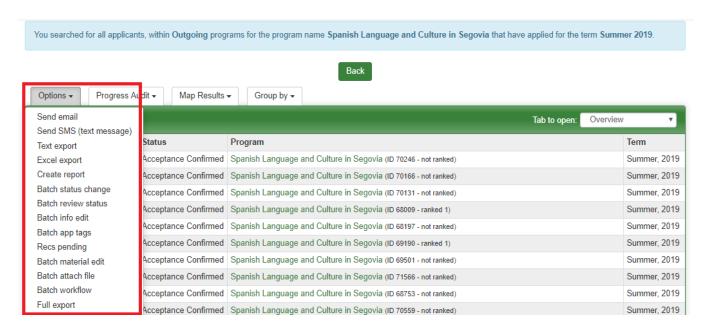
This makes it especially difficult to use as a reporting mechanism for incomplete applications. You can easily pull those applications that have a particular item incomplete, for example, anyone who hasn't paid their application fee. But you can't pull all applications that have ANY piece of their application incomplete, without running multiple queries (one for each process element) and then combining the results.

It is recommended that you use the Progress Audit report as an alternative for identifying incomplete applications for a given group of applicants.

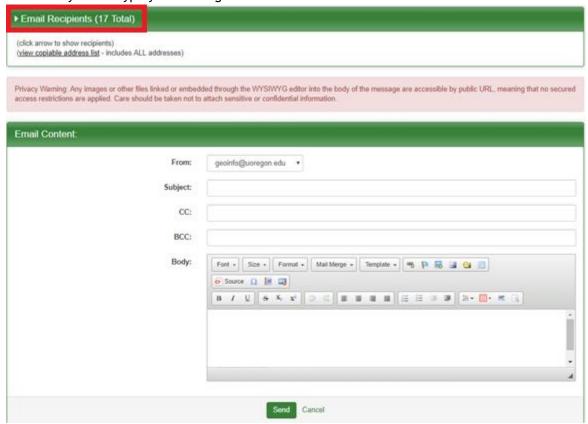
• Questionnaires - These options enable you to search for applications based on the responses submitted by applicants to the question items in application questionnaires.

Query Results Page

Once you have run your query and you are on the results page, there is a box called '**Options**' at the top of the page. If you click on the drop down arrow, you will see the following options: Send Email, Send SMS (text message), Text Export, Excel Export, Create Report, and Batch Attach File.



1. **Send Email-** The first option is **'Send email'**. Once you select this option, a window will open in which you can type your message and then send it.



When sending an email to multiple recipients, each recipient receives a separate email - the distribution list will not be known to the recipient. In other words, they will not know (or get the email addresses of) the other applicants to which you sent the email. You will also receive a copy of the email.

If you wish to send an email to certain students within the search results, you must click the arrow next to "Email Recipients" and uncheck the box next to the students whom you wish to exclude.

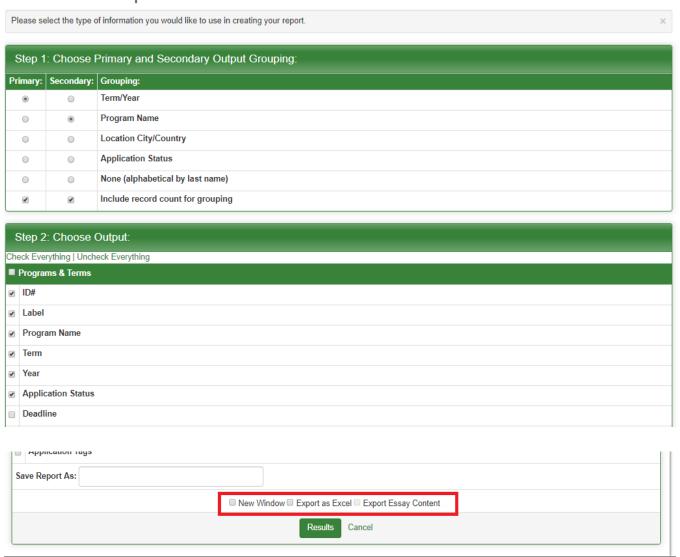
Send Text- The second option is 'send SMS (text message)'. Once you select this option, a
window will open in which you can type your message and then send it. In cases where a user
hasn't provided an SMS address, the message will be sent to the user's primary email address.

The SMS functionality of the software is generating the messages via the email portal provided by mobile phone carriers and while there is no cost to the office sending the message - care should be taken with the use of this functionality as there may be charges on the side of the applicant for receiving these messages.

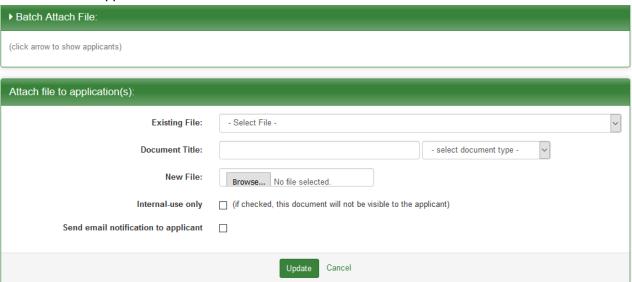
Note: This functionality will work with international numbers if the international carrier provides a domain name to which SMS messages can be sent via email. For these carriers, the

- applicants are provided with an 'Other' option in the carrier drop-down menu which permits them to manually enter this domain.
- 3. **Create Report-** Once you select this option, you will be presented with the Report Wizard. Mark all the items you would like to be included in the report. At the bottom of the page, click Results. When the report generates, you can see the report in the new window by clicking the "New Window". Note: You will also have the option to export your report into Excel. "Export Essay Content" needs to be checked to include responses to the essay-type questions.

Admin User: Report Wizard



4. **Batch Attach File-** The sixth option is 'Batch Attach File'. Once you select this option, the system will bring you to a form where you can either select an existing document from the site's Document Center to attach to the application or upload a file to the server that will be attached to the application.



When attaching a document, you can decide whether or not the applicant is going to see this attached document and whether or not the applicant will receive an email notification regarding the document being attached to their application. If you wish to send an email notification to the applicant, check the box next to "Send email notification to applicant".

If documents are available to the applicants, they will see these documents in a panel on their application pages. The applicants will be able to download/view them from this panel of their application page.

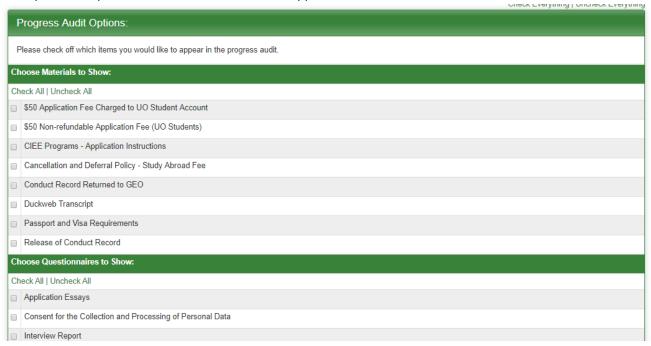
Progress Audit

The progress audit is a report that can be executed on the results of an application search in which a list of process elements and requirements can be selected and a report detailing whether or not the items are completed, not yet completed, or are not applicable to the application is output. This report can be exported to an Excel document.

Running a progress audit is done after running an application search. A drop-down menu appears at the top of the search results listing from which the administrator can select the phase in which the report will be checking the progress. Only one phase's process elements can be output in a single progress audit.

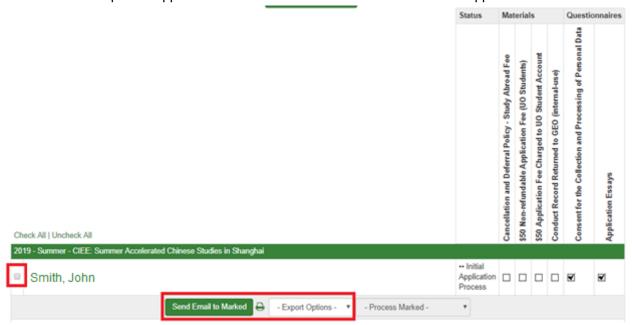


Once the phase is selected, the admin is taken to a wizard that will list all the materials, signature documents, and questionnaires that are applicable to the applications in the search results for the selected phase. There are also options for including the number of submitted reviews and the tally of completed/required recommendations for the applications.



After making all the required selections, the report will be generated. This will list whether or not the selected items are complete, incomplete, or not applicable elements for that application's current phase.

There is an option to export this report into an Excel document. There is also an option to mark checkboxes for specific applications and send a batch email to the checked applicants.



Shared queries

GEO has created five queries for your institution: 'Acceptance Offered', 'Application Cancelled', 'Application Initiated', 'Under Review', and 'Participation Confirmed'. These queries will appear on your admin homepage and will reflect the most updated lists of applications for students from your institution.

- In the 'My Queries and Reports' panel, click on the 'Shared Queries'.
- Click on the title of the guery.
- You will see the most updated list of students.

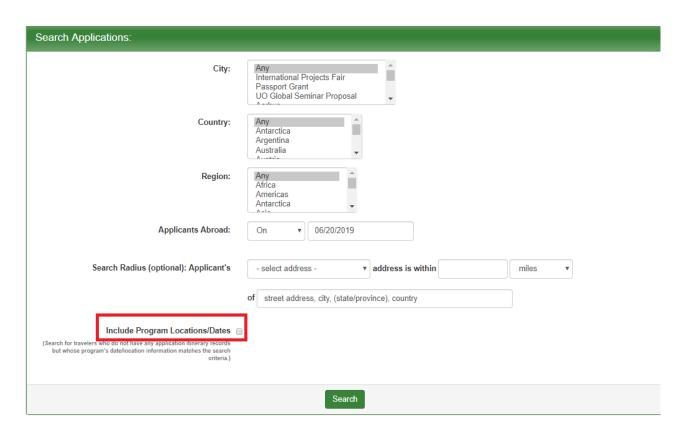


Locator Search

In the Locator Search page, you can search for applications based on the location at which the applicant stays. Locator Search can be accessed under Applicants -> Locator Search.

- Select the location (City, Country, and Region) you wish to search in, from the respective drop-down list boxes.
- The Applicants Abroad drop-down list box provides you with two options, 'On' and 'Between'. If you select 'On', you are prompted to enter only one date. If you select 'Between' from the list box, you are asked to provide a date range. This is the date or date range during which these applications are categorized as Abroad.
- Click Search to open a new search results page with all the applications that meet the search criteria.

IMPORTANT: When run locator search, please check the "Include Program Locations/Dates" box to ensure an accurate search.



Click Back to ignore the results and return to the Search home page.

**This feature is very useful in the case of an emergency. It can allow you to quickly identify who is in the specified location. You can then send a SMS text message to those applicants.

Application Layout - Administrative View

The Application administrative interface allows administrators to view the information related to an applicant's application and track submissions made by applicants

This admin interface can be accessed under Applicants -> Search or Advanced Search.

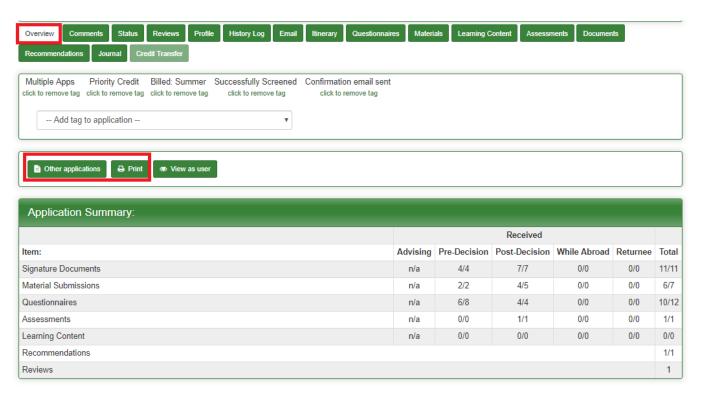
Application Management Tools

You can access various tools in the Application Management interface by clicking the appropriate tabs under the header. The tabs are the following:



Overview

This tab provides a summary of the application. It includes items to be submitted by the applicants and the number of items received. If the applicant has multiple applications, the "Other applications" button appears. Click the button to view other applications. Click the Print Application button on this page to print the application.

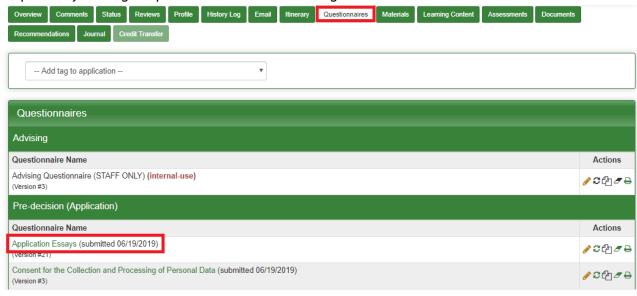


Reviews

You will have immediate access to review applications on your Reviewer Homepage. Once you have reviewed the application, your comments and responses will appear in this area of the application management page. Click <u>here</u> for more information on how to submit a review.

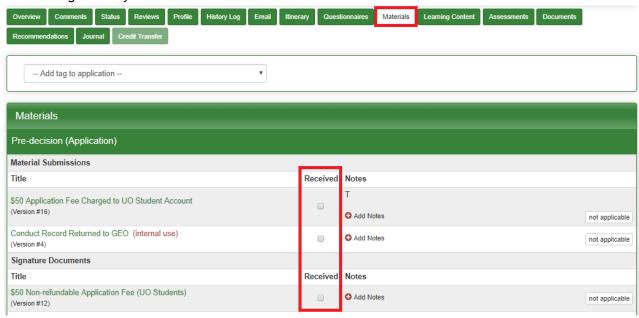
Questionnaires

This tab displays a list of questionnaires that are applicable to the application. There can be various headers under which submitted questionnaires are grouped in this tab. If the questionnaire has been submitted, the questionnaire title will be in green with the submission date. You can click on the questionnaire title to view the student's responses. You can also print the questionnaire responses by clicking the printer icon located on the right.



Materials

This tab provides a list of material submissions and signature documents that are applicable to the application. It displays whether or not the materials and documents have been received by the GEO office along with any notes associated with the submissions.



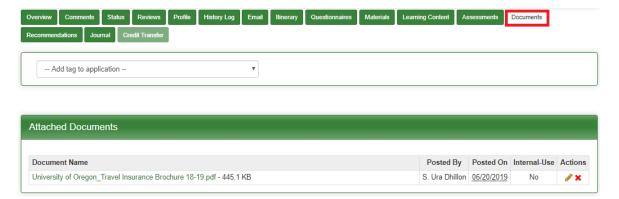
Assessments

In this tab you can see if the Assessments have been completed.



Documents

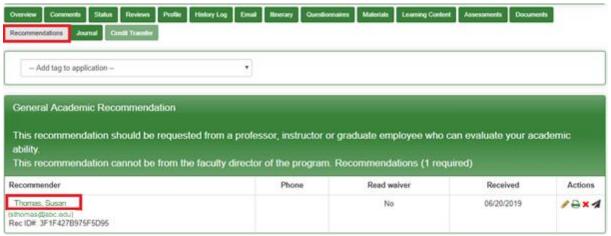
You can view any documents that were attached to the application.



Recommendations

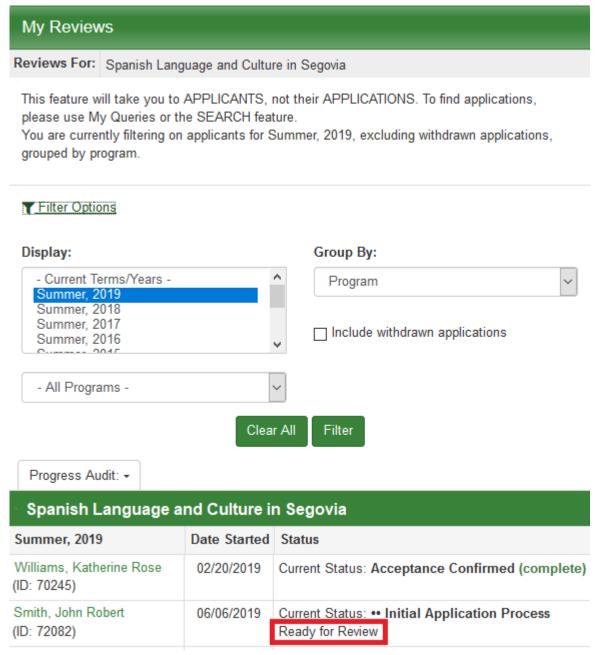
This tab enables you to view all the recommendations that have been made to this application.

• You can click on the recommender's name to review what the recommender submitted. You can print the recommendation by clicking the printer icon located on the right.



My Reviews

'My Reviews': This section on your admin home page first summarizes what you review, and reminds you that by default you are only seeing applications from current applications cycles.



To see other applications, click the 'Filter Options' button. You can filter by: application cycles, programs, term and year, and whether or not to include withdrawn applications.

In the middle column, the date the application was started is shown. The final column displays the status of the application, including the reviewers feedback.

To see the application materials that have been completed at a glance, select the appropriate phase from the 'Progress Audit' option. This will take you to form where you can select which application materials you'd like to run the progress audit for in the phase you previously selected. You can also contact the applicants this way. For example, if you need to contact each applicant that has yet to pay their application fee, you can run the progress audit, select the applicants who are missing it, and choose to contact them.

Submitting a Review

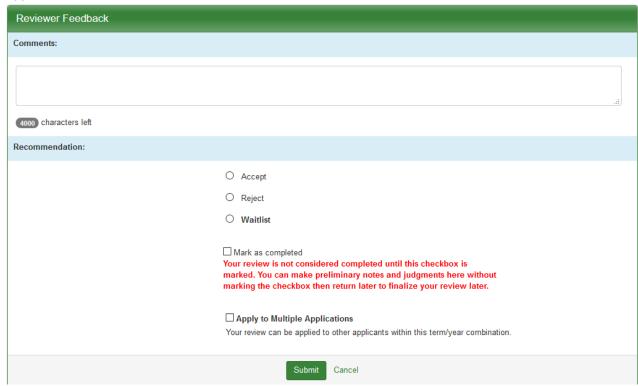
Language(s) studied & Number of years:

From the 'My Reviews' pane, select an applicant to review by clicking their name.

You may be able to see applicant information, parameters, and responses to questionnaires, depending on the permissions granted to you <u>on one page</u>.

Reviewers: Review: John Smith Smith, John (Edit Profile) Created: 11/29/2011 (by Super User, Studio Abroad) Non-UO Applicant Last Updated: 12/18/2015 @ 11:41:46 AM Last Viewed by Applicant: unknown (No home institution specified) ID# 16416:no label Agreement - Spanish Language and Culture in Segovia Ongoing File, 2021-2022 (add principal application) Status: Contracts: Expired/Discarded Risk Management Applicant **Profile** Applicant Information Gender: Date of Birth: Confidentiality Flag: Email Address: intlavp@uoregon.edu SMS Email Address Alternate Email Address: **Custom Parameters** Middle Name: Preferred Name: Gender Identity: Preferred Pronouns: Academic standing at the beginning of the program Place of Birth (city, state, country): Are you a U.S. citizen?: If you are not a U.S. citizen, are you a U.S. permanent resident? How will you finance your study abroad program?:

At the bottom, you can add your reviewer feedback. This includes comments, recommendation, if the review should be marked as complete, and if your review of this applicant should apply to their other applications.



Note: a recommendation does not change the status of the student. Your recommendation will be reviewed by GEO as part of the applicant acceptance process.

Note: As the instructions explain, you review is not complete until you've clicked the checkbox to mark it as completed and clicked submit. You can return to the application and change any comments as long as you *have NOT marked* the review as being complete.