

# Prairie View A&M University Terra Dotta User Manual

<http://studyabroad.pvamu.edu>

## [Programs - Creating & Managing](#)

### [Application Process](#)

### [Application Cycles and Statuses](#)

### [Application Management Tools](#)

### [Additional Functionality](#)

### [Helpful Tools](#)

## Creating & Managing Programs

### [Using the Program Wizard](#)

The Program Wizard guides an administrator through the steps of building and configuring all of the essential functions of a new program. It also provides a guided method for editing an existing program. The Program Wizard is designed with new administrators in mind, allowing someone with little to no Terra Dotta Software experience to jump in and make a program that is applicant-ready. This also serves as a powerful tool for experienced TDS admins by simplifying the program creation process.

**Note:** See step 2 on Program Wizard article linked above for more information about **editing program dates including deadline and program itinerary once the application cycle has been created under Process > App Cycles**

### [Program Templates](#)

The program template functionality allows an administrator to build the basic structure of a program once save it for use with every new program assigned to a specific program group.

### [Program Discovery](#)

The program template functionality allows an administrator to build the basic structure of a program once save it for use with every new program assigned to a specific program group.

### [Managing Locations](#)

The Locations Admin tool is used to enter all of your program destinations. It is also where you can create the location entry for your own institution. You can access the tool by going to Settings > Locations. When you click the tool, you can see a list of the current locations in the account, if there are already some that have been created.

### [Managing Program Parameters](#)

The Program Parameters Admin tool is used to provide your account with the list of attributes that the programs offered through your institution contain. All the data that is used to describe program attributes, inform about requirements, or list important characteristics can be formatted as a parameter and then used for every new program that is created. The program parameters are very useful in storing uniform information about your programs. They are all instrumental in creating a searchable database of programs. The parameters for all your programs can be used by applicants as filters when searching for programs with specific attributes.

### [Program Types](#)

A program type is the top-level classification of programs and processes to which your users will have applications. There are many aspects of the application process and features that are available to applicants and programs that are determined by the characteristics of the program type. In addition to this, how potential applicants can find and start applications to programs can also be determined by the characteristics of the program type.

## Application Process

**NOTE:** Prior to opening program applications, **application process** requirements should be reviewed. App cycle should be created after review to open applications for a term/year (i.e. Fall 2019).

### [Managing Application Materials](#)

This tool enables you to construct, edit, and retire application materials specifically for a program or a group of programs. Material Submissions and Signature Documents are considered 'Materials' in Terra Dotta software

### [Managing Questionnaires](#)

This tool enables you to construct, edit, and retire questionnaires for applicants depending on the cycle of the application process.

### [Managing Question Items](#)

The Question Items Admin tool is used to create all the individual questions that will be used to create questionnaires and recommendation forms. Once you create all the question items putting a questionnaire together is just a matter of selecting the proper questions from a list of pre-written questions.

### [Managing Learning Content](#)

Learning Content refers to a type of application requirement where administrators can deploy information to applicants. These are simply informational pages that the applicant can read and check off as having been read.

### [Managing Assessments](#)

Learn how to create, edit, and retire assessments/quizzes as well as how to run queries, reports and progress audits with assessment scores included.

### [Process Version Management](#)

Process Version Management (PVM) is a system that allows a Terra Dotta software application process to change over time and maintain accurate records of the past application activity. As process elements change, get added, or get removed, Terra Dotta's PVM system will transparently maintain the proper versions of the process elements as they existed at the time they were completed by the applicants. This article also discusses PVM for individual question items in questionnaires.

### [Itinerary Records](#)

Itinerary records are used to determine when an applicant is actively participating in a program, when an applicant has completed her/his participation in a program, and, if the itinerary record has a location assigned, where the applicant will be between the record's start and end dates.

## Application Cycles and Statuses

**NOTE:** App cycles must be created to open program applications for a term/year (i.e. Fall 2019). Any program configured with an active app cycle term (i.e. Fall) will be automatically opened so admins should ensure that programs are deactivated if they do not wish to automatically open applications for active programs.

### [Managing Application Cycles](#)

The application cycle determines the availability of the term of study for which your applicants may apply. It stores the global deadline and decision date for each application cycle. In addition, each application cycle contains the process map for all applications in that application cycle.

## [Application Phases and Statuses](#)

There are six unique application phases in Terra Dotta software's application process management. The process elements that are deployed (material submissions, signature documents, questionnaires, assessments, and learning content) are designated to appear to applicants in one of these phases with the exception of the alumni phase (no process elements are deployed in the alumni phase).

## [How App Cycles and Date Records Open/Close a Program](#)

When an application cycle is created and then made active, any active program in your catalog that has the term of that application cycle assigned to it will begin accepting applications for that application cycle regardless of whether or not a program date record has been created for it.

## **Application Management Tools**

### [Queries and Reports](#)

This article explains how you can use queries and reports in your office.

### [Application Search Results Page](#)

The Application Search Results page lists all applications that meet the search criteria provided in the Simple, Advanced, or Locator Search option in Applicants. This page also provides various methods of handling this group of applications including batch processing under the Options tab.

### [Query Watch](#)

Query Watch is a very powerful feature that leverages some of the software's core functionality and allows you to configure a robust system of notifications and data export. While the software contains many features that allow you to communicate and obtain critical data from your database, pulling these features together into an automated system is a necessary step in developing a workflow and integration that previously had to be managed manually or with custom built solutions.

### [Administrative Perspective of Applications](#)

Terra Dotta's application management interface allows administrators to view and edit the information related to an to applications. This article includes a video and written description of the functionality of each tab included in the administrative interface. [Overview tab, Comments tab, Status tab, Reviews tab, Profile tab, History Log tab, Email tab, Itinerary tab, Questionnaires tab, Materials tab, Learning Content tab, Assessments tab, Documents tab, Recommendations tab, Journal tab, Credit Transfer tab]

- Note in article linked above:
  - **See Status** for more details **on how to transfer an individual application to another program**
  - **See Email** for more info **on viewing emails sent to an applicant and sending an individual email to applicant**
  - **See History Log** for more info **on viewing log of activities** for application
  - **See Questionnaires and Materials** for more details **on how to un-submit questionnaires** so applicants can edit **and how to un-receive materials** (or mark them as not applicable)
  - **See Documents** for more details **on how to attach documents to an individual application.**  
**Note:** This can be also done in batch - see *Application Search Results Page* section above.

### [Admin Home Page and Settings](#)

This article provides information about each section of the admin homepage including: my queries and reports, my appointments, Terra Dotta Support, my recommendations, updates to sponsored programs, admin customizations, and more. It also describes the functionality available in the Admin Settings.

## **Additional Functionality**

### [Using the Study Abroad Directory](#)

The Study Abroad Directory provides institutions and program providers a platform to share information about study abroad programs. Instead of creating programs and updating them on their sites independently, Study Abroad clients can view all the programs that are created by providers on the Study Abroad Directory site and subscribe to any program they wish to appear on their site. Once they subscribe to a program, the information will appear on the client's site and the client will be notified every time the provider updates any information such as deadlines or prices - ensuring that you always have the most up-to-date information.

### [Reminder Emails](#)

This article explains how to set reminders by application/record phase, send reminders manually, and schedule program-group specific reminders.

### [Decision Letters](#)

Decision Letters are automated, official notifications that applicants receive on the Decision Date when their status is changed from 'Pending' to either 'Approved' (or 'Committed'), 'Rejected,' or 'Waitlist.' You can use either the software's default decision letters, or you can edit them to make them more specific to your office's procedures.

### [Admin Home Email Templates](#)

Admins have the option to create, share and import their own email templates into emails to applicants via emailing applicant(s) manually or automatically via a query watch.

### [System-wide Customizable Email Templates](#)

Terra Dotta Software currently utilizes many automated email messages delivered to administrators and applicants upon completion of specific actions. Beginning in TDS 17.3, we're making it much easier to customize your system's automated emails with the inclusion of customizable email templates.

### [Application/Process Element Tags](#)

Application and process element tags are digital sticky notes that can be easily added to or removed from applications and process elements.

## **Helpful Tools**

### [Troubleshooting why a process element isn't appearing](#)

There may be several reasons why a process element is not appearing on the application pages for an applicant. If you are receiving reports (or finding in testing) that a process element does not appear on the application page as you would expect, this article can help you determine why.

### [Conference Site](#)

Click here to see all upcoming conferences.

### [Using the Support Portal](#)

This document explains the functions and features of Terra Dotta's Support Portal.

## **CLIENT SUPPORT**

### **Support Hours**

Sunday: 7pm – 11pm EST

Monday: – Thursday: 8am – 11pm EST

Friday: 8am – 8pm EST

### **Submit a Case**

LOGIN to submit a case — this is the fastest way to receive an answer from our support team. We're standing by and will respond as quickly as possible.

**Support Phone**

877-368-8277 option 2

**Email Support**

support@terradotta.com

If you have a software question, please contact us via the case system.

**EMERGENCY SUPPORT**

Terra Dotta's emergency support team is on call even when our office is closed.

Please do the following to notify Terra Dotta support of any critical issues:

**During Office Hours**

LOGIN to this site and submit a support case. Be sure to mark it 'critical' and it will receive high priority status from our staff.

**For Critical System-Down Issues After Hours**

877-368-8277

Touch 2 for 'support' and leave a detailed voicemail.

Your message will trigger a notification to be sent to our after-hours support team who will respond as quickly as possible.

If your issue is not critical, please open a support case and we will respond during normal business hours.