**Terra Dotta Database 101**

**Steps for logging in**

1. Notify studyabroad@case.edu that you need an account and the type of user (faculty, program admin, university admin)
2. You’ll received an email telling you that you have an account
3. Log in at [**https://studyabroad.case.edu/index.cfm?FuseAction=Security.ExistingUserLogin**](https://studyabroad.case.edu/index.cfm?FuseAction=Security.ExistingUserLogin)
4. Admin Page
	1. Saved Queries
	2. Saved Reports
	3. Access on Left
	4. TerraDotta Knowledge Base on Right (help desk)

**Creating a Query ( you can set yourself or we can set and share it with you)**

A query is a list of applications

1. Choose Applicant Admin on Left
2. Choose Advanced Search
3. Choose Application Parameters
4. Choose item you want to query
	1. Faculty—program
	2. Program admin—program or program group
	3. University admin—term
5. Hit next and your query of applications will appear
6. Save your query (type your code for the query at the top)
7. The query now appears on your admin home page and will automatically update every time you select it

**Using Queries (under options at the top of the query)**

1. Send email to students
2. Send text to students
3. Create a report
4. Do a progress check

**Creating a Report**

A report is gathered data about a query. For example, if you want all students going to Guatemala and their emergency contact information, you would query the Guatemala program and then create a report with the emergency contact information.

1. Click on the appropriate query
2. Options—create report
3. Choose your grouping—alphabetically by last name (sorting feature)
4. Choose what is important in the report (will vary depending on your need)
	1. Program Name
	2. Term
	3. Year
	4. Gender
	5. Email
	6. Date of birth
	7. Passport information
	8. Address information
	9. Medical information
5. Type in report name (save report as) at bottom
6. Click results
7. Go back to admin home page and see your saved report, which will automatically update
8. You can put it in excel, share the report with others, edit the report, or delete the report

**Program Administrators—Checking off Received Items**

1. Get to the appropriate student application
	1. Option 1: Choose your query and click on the student
	2. Option 2: go to applicant admin and search for the student
2. Click on the materials tab in the student application
3. Check off any materials (registered for course, met with advisor)
4. You can add any notes that you like and you can choose to have an email sent to the student telling them that it has been checked off
5. Click save all

**Program Administrators—Accepting/Rejecting Students**

1. Check your query for students who have completed applications
2. Determine if you want to accept or reject the student
3. Go to the status tab and change the student status to accept or reject
4. Save

Once you have accepted or rejected a student, an email will be sent to the student letting him know that there has been a change in the application. The student will log in and see the results. If the student has been accepted, the student will have to commit to the program or withdraw. Once the student commits, then the student will see the second phase of the information.