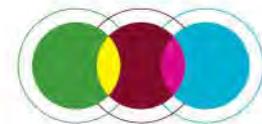




# WELCOME

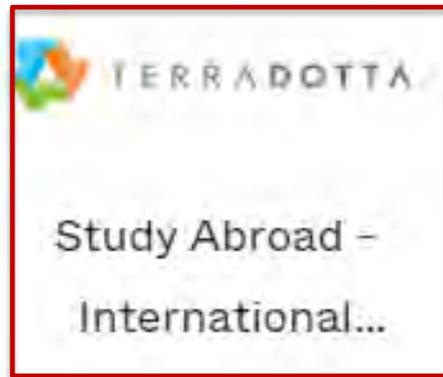
## Accessing Student Files



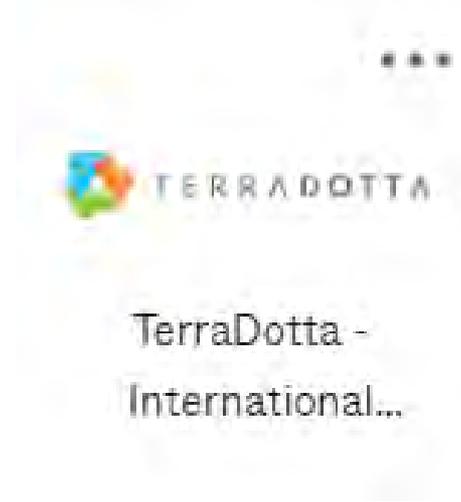
**INTERNATIONAL PROGRAMS**

# Access to Online Student Applications

From the Okta Dashboard (MyApps) select the TerraDotta – Study Abroad – International icon



YES

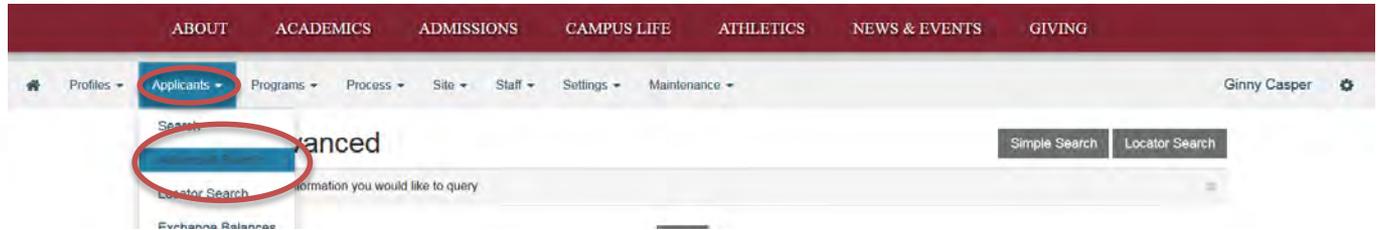


NO

You will need to be on campus or logging in by VPN to access the database. If you need assistance, please contact ITS.

## Access Student Files

- You will need to create a list of the students you are tracking
- From the **Applicant** drop-down menu, select **Advanced Search**





## Access Student Files

1. Select **Application Parameters**
2. Click **Next**

Profiles ▾ Applicants ▾ Programs ▾ Process ▾ Site ▾ Staff ▾ Settings ▾ Maintenance ▾ Ginny Casper ⚙

Search : Advanced Simple Search Locator Search

Please select the type of information you would like to query

2. Next

**New Query Wizard**

Choose the type of information you would like to query:

1.  Application Parameters

Program Parameters



# Access Student Files

Select Parameters:

1. User Classification: *Union Only*
2. Program Types (Important!): *Program Enrollment*
3. Application Cycles: *All (or select a specific term. If need more than one, hold down the **ctrl** key)*
4. Application Phase: *Pre-Decision*
5. Application Tags: Initially, select *Any (pages 7-10 explain how to use this feature)*
6. Application Terms: *All (or select a specific term. If need more than one, hold down the **ctrl** key)*
7. Application Years: *All (or select a specific term. If need more than one, hold down the **ctrl** key)*

Search : Advanced Simple Search

Use the form below to search for applications based on one or more criteria. The list boxes allow you to select multiple values within them by holding the Ctrl/Cmd key while clicking. x

Back Search

---

Show:

1. User Classification:

All

Union Only

Non-Union Only

2. Program Types:

incoming

Risk Manage

**Program Enrollment**

Incident Rep

Travel Regis

By Institution:

(keyword search)

Exchange Status:

All

Exchange

Non-exchange

---

Application Parameters:

3. Application Cycles:

All

Fall 2018

Fall 2017

ISA Program 2017

Click to add all existing application cycles

4. Application Phase:

All

Advising

**Pre-Decision**

Post Decision

---

5. Application Tags:

Any

Accept - Conditional

Accepted

Advisor Does Not Adv

is assigned  is not assigned

6. Application Terms:

All

Academic Year

2019/2020 Kansai Gaido

Fall

Fall Exchange

7. Application Years:

All

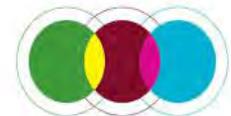
2019

2018

2017

2016

Continued  
on next  
slide



# Access Student Files – *continued*

Select Parameters (*continued from previous slide*):

8. Program Status: *Pending*
9. Program: *Union Programs not through International Programs*
10. Press **Search**. A new window will appear with the results.
11. Scroll towards bottom of page to find the box **Save Search Query** and name this search, e.g. SRG – 18FA

Application Status:

Check All   Uncheck All

8.  Advising  
 Advising (no aliases)

Pending  
 Pending (no aliases)

Waitlist  
 Waitlist (no aliases)

Accepted  
 Accepted (no aliases)

GPA too low  
 Wait Pool  
 Accepted - NonUnion-Conditions

Deferred Application  
 Deferred Acceptance

9. Programs & Locations:

Program:

- Senegal - Summer break Mini-Term
- South Africa - Winter Break Mini-Term
- Spain - Summer Break Mini-Term
- Spain (Cordoba) - Winter Break Mini-Term
- Spain (Seville) - Fall Term (Odd Years)
- Tanzania - Winter Term (even years)
- Thailand - Winter Break Mini-Term
- Turkey - Fall or Winter/Spring
- Union Programs not through International Programs
- Uruguay - Spring Term
- Vietnam - Fall Term

Program Groups:

- All
- Uncategorized
- Terms Abroad - Union
- Terms Abroad - PGE
- Mini-Terms
- Non-Union Programs
- IBM
- Independent Study Abroad (ISA) Programs
- International Exchange Students/Leaders
- Incoming F-1 visa international students

City:

- All
- Aachen
- Accra
- Addis Ababa
- Agra
- Akuapem Hills
- Alleppey
- Amman
- Amsterdam
- Andasibe

Country:

- All
- Argentina
- Australia
- Austria
- Belgium
- Bolivia
- Brazil
- Cambodia
- Canada

Region:

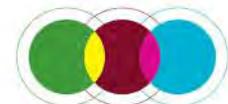
- All
- Africa
- Asia
- Australia/Pacific Islands
- Central America
- Europe
- Latin America
- Middle East
- North America
- Oceania

Include Program Locations (this expands the search to also include all applications that are part of a program having any program-level location assignment selected above.)

10.

11. Save Search Query

SRG-18FA



# Selecting Your Students

From this list, you can select the students for which you are responsible by going to the Options tab and selecting *Batch app tags*



Search : Results Search Search Results

Following is a listing of applications that meet your search criteria.

You searched for all applicants, within Outgoing programs.

Back

Options ▾ Progress Audit ▾ Group by ▾

Search results based on application itinerary.

Name	Status	Program	Term
Abarbanel, Lily R	Confirmed Participation	Germany - Spring Term (ID 18443 - not ranked)	Spring, 2017
Abdow, Erik M	Confirmed Participation	England (London) - Spring Term (ID 11246 - not ranked)	Spring, 2015
	Wait Pool	France (Lille) - Winter Economics Exchange (ID 10779 - not ranked)	Winter, 2015
Aboulaifa, Jacqueline R	Confirmed Participation	Italy (Florence) - Spring Term (ID 12701 - ranked 2)	Spring, 2016
	Wait Pool	Greece - Fall Term (ID 11589 - not ranked)	Fall, 2015
	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (ID 12078 - not ranked)	Winter Break, 2015
Abu Nawash, Kenda	Pending	Greece - Fall Term (ID 23276 - not ranked)	Fall, 2016
Adams, Kiley E	Confirmed Participation	Czech Republic - Fall Exchange (ID 17051 - ranked 1)	Fall, 2016
	Wait Pool	New Zealand - Winter Break Mini-Term (ID 11995 - not ranked)	Winter Break, 2015
Adams, Savannah R	Confirmed Participation	England (London) - Spring Term (ID 11254 - ranked 1)	Spring, 2015

Search : Results Search Search Results

Following is a listing of applications that meet your search criteria.

You searched for all applicants, within Outgoing programs.

Back

Send email ▾ Send SMS (text message) ▾ Group by ▾

application itinerary.

	Status	Program	Term
Text export	Confirmed Participation	Germany - Spring Term (ID 15445 - not ranked)	Spring, 2017
Excel export	Confirmed Participation	England (London) - Spring Term (ID 11246 - not ranked)	Spring, 2015
Create report	Wait Pool	France (Lille) - Winter Economics Exchange (ID 10779 - not ranked)	Winter, 2015
Batch status change	Confirmed Participation	Italy (Florence) - Spring Term (ID 12701 - ranked 2)	Spring, 2016
Batch review status	Wait Pool	Greece - Fall Term (ID 11589 - not ranked)	Fall, 2015
Batch info icon	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (ID 12078 - not ranked)	Winter Break, 2015
<b>Batch app tags</b>	Pending	Greece - Fall Term (ID 23276 - not ranked)	Fall, 2016
Rec's pending	Confirmed Participation	Czech Republic - Fall Exchange (ID 17051 - ranked 1)	Fall, 2016
Batch material edit	Wait Pool	New Zealand - Winter Break Mini-Term (ID 11995 - not ranked)	Winter Break, 2015
Batch attach file	Confirmed Participation	England (London) - Spring Term (ID 11254 - ranked 1)	Spring, 2015
Batch workflow	Provided Financial Waiver	Cuba Winter Break Mini-Term (ID 12022 - not ranked)	Winter Break, 2015
Full export	Wait Pool	France (Lille) - Winter Economics Exchange (ID 10959 - not ranked)	Winter, 2015
	Confirmed Participation	Community Service - Winter Break Mini-Term (ID 11126 - not ranked)	Winter Break, 2014
	Confirmed Participation	France (Lille) - Winter Economics Exchange (ID 12024 - not ranked)	Winter, 2016



*Continued  
on next  
slide*



# Selecting Your Students - continued

To select your students, first click on the arrow/triangle to the left of the heading *Batch Application Tag Edit*:

You will see all the names. Similar screenshot seen below.

Batch Processing : Information Results Search Search Results

Use this form to add or remove application tags to the checked applicants listed below. ✕

**▶ Batch Application Tag Edit**

(click arrow to show applicants)

Add Application Tag -- Select application tag --

Remove Application Tag -- Select application tag --

Batch Processing : Information Results Search Search Results

Use this form to add or remove application tags to the checked applicants listed below. ✕

▼ Batch Application Tag Edit:

<input checked="" type="checkbox"/>	Name	Status	Program / Application Cycle
<input checked="" type="checkbox"/>	Abarbanel, Lily R	Confirmed Participation	Germany - Spring Term (Spring, 2017)
<input checked="" type="checkbox"/>	Abdow, Erik M	Confirmed Participation	England (London) - Spring Term (Spring, 2015)
<input checked="" type="checkbox"/>	Abdow, Erik M	Wait Pool	France (Lille) - Winter Economics Exchange (Winter, 2015)
<input checked="" type="checkbox"/>	Aboulafia, Jacqueline R	Confirmed Participation	Italy (Florence) - Spring Term (Spring, 2016)
<input checked="" type="checkbox"/>	Aboulafia, Jacqueline R	Wait Pool	Greece - Fall Term (Fall, 2015)
<input checked="" type="checkbox"/>	Aboulafia, Jacqueline R	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (Winter Break, 2015)
<input checked="" type="checkbox"/>	Abu Hawash, Kinda	Pending	Greece - Fall Term (Fall, 2016)
<input checked="" type="checkbox"/>	Adams, Kiley E	Confirmed Participation	Czech Republic - Fall Exchange (Fall, 2016)
<input checked="" type="checkbox"/>	Adams, Kiley E	Wait Pool	New Zealand - Winter Break Mini-Term (Winter Break, 2015)
<input checked="" type="checkbox"/>	Adams, Savannah R	Confirmed Participation	England (London) - Spring Term (Spring, 2015)
<input checked="" type="checkbox"/>	Adeniran, Omololu O	Provided Financial Waiver	Cuba Winter Break Mini-Term (Winter Break, 2015)

*Continued  
on next  
slide*



# Selecting Your Students - continued

1. Uncheck *Name*
2. Select the students you for which you are responsible (e.g. Mech Eng, Math, SRG). If they have more than one application, looking at the term on the right may help determine which application to select.

Batch Processing : Information Results Search Search Results

Use this form to add or remove application tags to the checked applicants listed below.

1. 

Batch Application Tag Edit		
<input checked="" type="checkbox"/> Name	Status	Program / Application Cycle
<input checked="" type="checkbox"/> Abarbanel, Lily R	Confirmed Participation	Germany - Spring Term (Spring, 2017)
<input checked="" type="checkbox"/> Abdow, Erik M	Confirmed Participation	England (London) - Spring Term (Spring, 2015)
<input checked="" type="checkbox"/> Abdow, Erik M	Wait Pool	France (Lille) - Winter Economics Exchange (Winter, 2015)
<input checked="" type="checkbox"/> Aboulafia, Jacqueline R	Confirmed Participation	Italy (Florence) - Spring Term (Spring, 2016)
<input checked="" type="checkbox"/> Aboulafia, Jacqueline R	Wait Pool	Greece - Fall Term (Fall, 2015)
<input checked="" type="checkbox"/> Aboulafia, Jacqueline R	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (Winter Break, 2015)
<input checked="" type="checkbox"/> Abu Hawash, Kinda	Pending	Greece - Fall Term (Fall, 2018)
<input checked="" type="checkbox"/> Adams, Kiley E	Confirmed Participation	Czech Republic - Fall Exchange (Fall, 2016)
<input checked="" type="checkbox"/> Adams, Kiley E	Wait Pool	New Zealand - Winter Break Mini-Term (Winter Break, 2015)
<input checked="" type="checkbox"/> Adams, Savannah R	Confirmed Participation	England (London) - Spring Term (Spring, 2015)
<input checked="" type="checkbox"/> Adeniran, Omotolu O	Provided Financial Waiver	Cuba Winter Break Mini-Term (Winter Break, 2015)

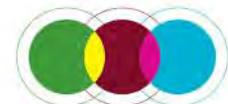
Batch Processing : Information Results Search Search Results

Use this form to add or remove application tags to the checked applicants listed below.

2. 

Batch Application Tag Edit		
<input type="checkbox"/> Name	Status	Program / Application Cycle
<input checked="" type="checkbox"/> Abarbanel, Lily R	Confirmed Participation	Germany - Spring Term (Spring, 2017)
<input type="checkbox"/> Abdow, Erik M	Confirmed Participation	England (London) - Spring Term (Spring, 2015)
<input type="checkbox"/> Abdow, Erik M	Wait Pool	France (Lille) - Winter Economics Exchange (Winter, 2015)
<input checked="" type="checkbox"/> Aboulafia, Jacqueline R	Confirmed Participation	Italy (Florence) - Spring Term (Spring, 2016)
<input type="checkbox"/> Aboulafia, Jacqueline R	Wait Pool	Greece - Fall Term (Fall, 2015)
<input type="checkbox"/> Aboulafia, Jacqueline R	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (Winter Break, 2015)
<input type="checkbox"/> Abu Hawash, Kinda	Pending	Greece - Fall Term (Fall, 2018)
<input checked="" type="checkbox"/> Adams, Kiley E	Confirmed Participation	Czech Republic - Fall Exchange (Fall, 2016)
<input type="checkbox"/> Adams, Kiley E	Wait Pool	New Zealand - Winter Break Mini-Term (Winter Break, 2015)

*Continued  
on next  
slide*



## Selecting Your Students - continued

Scroll to the bottom of the screen to select the appropriate tag (hold the **ctrl** button to select more than one tag). *If you do not see an application tag for your department, see the last slide for contacting the International Programs office.*

<input type="checkbox"/>	Zou, Andy	Confirmed Participation	Argentina (Buenos Aires) - Winter Break Mini-Term (Winter Break, 2016 )
<input type="checkbox"/>	Zou, Andy	Not Accepted	Belgium - Fall Economics Exchange (Fall, 2015 )
<input type="checkbox"/>	Zou, Andy	Waitlist	Cuba Winter Break Mini-Term (Winter Break, 2015 )
<input type="checkbox"/>	Zou, Andy	Confirmed Participation	New Zealand - Winter Break Mini-Term (Winter Break, 2015 )
<input checked="" type="checkbox"/>	van Esche, John P	Confirmed Participation	New Zealand - Winter Break Mini-Term (Winter Break, 2014 )
<input type="checkbox"/>	van Zijl, Erik C	Wait Pool	Orange - Fall Term (Fall, 2016 )

Add Application Tag

Remove Application Tag

-- Select application tag --

- Select application tag
- Accept - Conditional
- Accepted
- Advisor Does Not Approve
- Anthropology
- App OK
- Astronomy
- Athletics
- Attending other program
- Biology
- Chemistry
- Classics
- CommServ App
- Computer Science
- Conference Travel
- Dean of Students - Points
- Earned Academic Credit
- ECE
- Economics
- English

807 UNION ST.

(518) 388-6112

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CONTACT ADMISSIONS:

Grant Hall

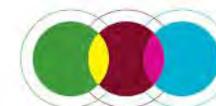
807 Union Street

(518) 388-6112

Request information

© Trustees of Union College

With this application tag, you can go create a new query (see page 5, point 5)





## Review an Individual File

From your Administrative home page, select the Query you wish to review by clicking on the name you gave it

Administration : Home Admin Settings Share

Below are several administrative areas that allow you to manage your programs, applications, applicants, as well as

### Tasks

Task List New Task Settings

Subject	Due date	Assigned to
---------	----------	-------------

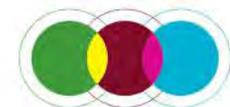
### My Queries & Reports

View folder

Uncategorized Moved checked 1

<input type="checkbox"/> Saved Query	Actions
<input checked="" type="checkbox"/> <u>18WI - Union Programs - NonIP</u>	
<input type="checkbox"/> Union Programs non-IP Programs	

Shared Queries



# Review an Individual File

Click on the program name next to the student

## Administration : 18WI - Union Programs - NonIP

New Task

Following are the results of your saved search.

### Results for saved query "18WI - Union Programs - NonIP"

You searched for all applicants (internal-only), within Program Enrollment programs for the program name Union Programs not through International Programs that have applied for the term Winter 2018, that have a status of pending (and all aliases).

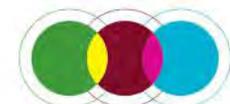
Options ▾

Progress Audit ▾

Group by ▾

Search results based on application itinerary:

Name	Status	Program	Term
Casper, Rosa	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23502 - not ranked)	Winter, 2018
Epstein, Samantha	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23504 - not ranked)	Winter, 2018
Herbert, Jordan N	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23494 - not ranked)	Winter, 2018
MacManus-Spencer, Laura	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23493 - not ranked)	Winter, 2018
Maung, Jessica N	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23498 - not ranked)	Winter, 2018
O'Hora, Heidi E	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23500 - not ranked)	Winter, 2018
Pagano, Alexandra E	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23497 - not ranked)	Winter, 2018
Riley, Rachel A	Pending	<a href="#">Union Programs not through International Programs</a> (ID 23499 - not ranked)	Winter, 2018





## Required Paperwork

### Questionnaires

- Emergency Contact Information – entered online
- Self-Identification Form – uploaded online. This is for special accommodations/learning disabilities. If applicable, the student must submit the original form to [Accommodative Services](#)
- Smart Traveler Enrollment Program (not required for international students traveling outside of the United States and students traveling within the United States) – entered online
- Health Insurance (only required for students traveling outside of the United States) – proof of purchased insurance uploaded online
- Student Health Information (optional) – entered online
- Travel Information
- Passport Copy (only required for students traveling outside of the United States) – entered and uploaded online
- Participant Agreement – completed and uploaded online

### Online Signature Documents

- Alcohol & Drug Policy – digital signature
- Conduct Code – digital signature
- Sexual and Other Forms of Unlawful Harassment Policy – digital signature



# Access Student Files / Required Paperwork

## Application : Overview

Search Search Results New Task

Use the tabs below to view and change information for this application. x

Casper, Rosa ([Edit Profile](#))  
 Union Programs not through International Programs  
 Winter, 2018  
 Status: Pending  
 Program Enrollment Applicant

Created: [02/06/2018](#) (by Applicant)  
 Last Updated: [02/06/2018 @ 04:15:10 PM](#)  
 Last Viewed by Applicant: [02/06/2018](#)  
 ID# 23502

[\(add principal application\)](#)

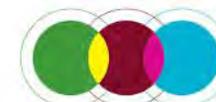
- [Comments](#)
- [Status](#)
- [Reviews](#)
- [Profile](#)
- [History Log](#)
- [Email](#)
- [Itinerary](#)
- [Questionnaires](#)
- [Materials](#)
- [Resources](#)
- [Assessments](#)
- [Documents](#)
- [Advisor Approval\(s\)](#)
- [Journal](#)
- [Credit Transfer](#)

-- Add tag to application --

[Print Application](#)

### Application Summary:

Item:	Advising	Received			Returnee	Total
		Pre-Decision	Post-Decision	While Abroad		
Signature Documents - Found under <b>Materials</b> tab	0/0	0/3	0/0	0/0	0/0	0/3
Material Submissions	0/0	0/0	0/0	0/0	0/0	0/0
Questionnaires - Found under <b>Questionnaires</b> tab	0/0	0/8	0/0	0/0	0/0	0/8
Assessments	0/0	0/0	0/0	0/0	0/0	0/0
Resources	0/0	0/0	0/1	0/0	0/0	0/1
Academic Advisor Approvals						0/0





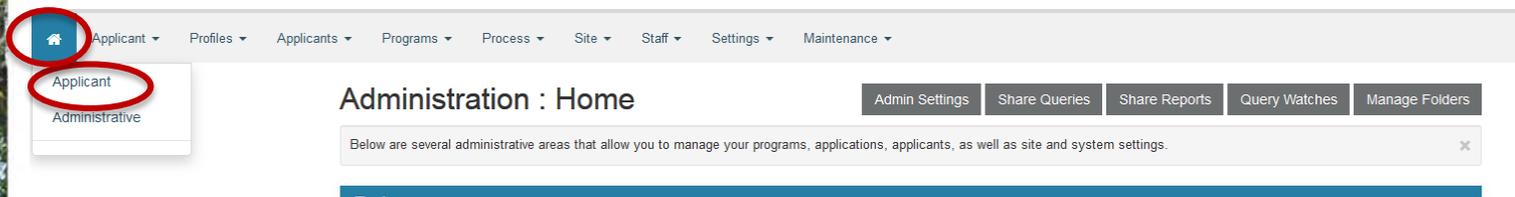
## Explanations

- **Status:** “Pending” status. All applications begin as “Pending”. Once a student completes all the paperwork for the program, you can go in and change this to “Processed”. This will still save the file but will remove it from the Query you open up.
- **Pre-Decision:** This is not applicable to your review and will never change. It was used to set up this program in the database.
- **Materials:** Refers to documents that were either digitally signed, called a Signature Document, or if we need the actual hard copy, it is called a Material Submission.
- **Questionnaires:** Refers to information the student directly entered online or was able to upload

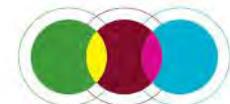
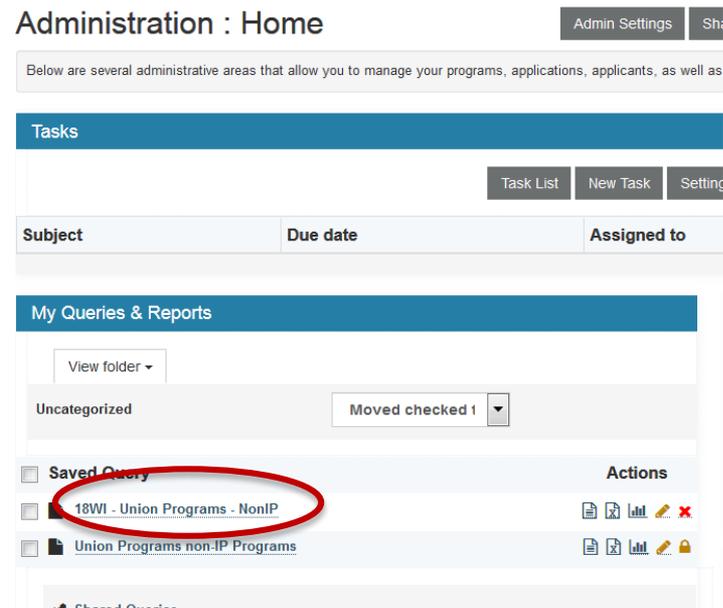


# Run an Audit on a Group

- To see how far along the students are in completing their paperwork, rather than checking one by one, you can run an audit
- Go the **Administrative** home page



- Click on the name of the query you created



# Run an Audit on a Group

- From the tab **Progress Audit**, select **Pre-Decision**

## Administration : 18WI - Union Programs - NonIP

New Task

Following are the results of your saved search

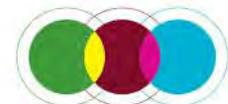
### Results for saved query "18WI - Union Programs - NonIP"

You searched for all applicants (and all aliases), within Program Enrollment programs for the program name Union Programs not through International Programs that have applied for the term Winter 2018 and have a status of pending (and all aliases).

Advising Progress Audit Group by

**Pre Decision** Sorted on application itinerary:

Status	Program	Term
Pending	<a href="#">Union Programs not through International Programs</a> (ID 23502 - not ranked)	Winter, 2018
Pending	<a href="#">Union Programs not through International Programs</a> (ID 23516 - not ranked)	Winter, 2018
Pending	<a href="#">Union Programs not through International Programs</a> (ID 23504 - not ranked)	Winter, 2018



# Run an Audit on a Group

## Batch Processing : Progress Audit

Search Search Results

Following is a progress audit for signature documents, material submissions, questionnaires and recommendations. x

Check Everything | Uncheck Everything

### Progress Audit Options:

Please check off which items you would like to appear in the progress audit.

#### Choose Materials to Show:

Check All | Uncheck All

- Alcohol & Drug Policy
- Conduct Code
- Sexual & Other Forms of Unlawful Harassment Policy

#### Choose Questionnaires to Show:

Check All | Uncheck All

- 1. Emergency Contact Information
- 2. Self-Identification Form
- 3. GeoBlue Insurance
- 4. Smart Traveler Enrollment Program
- 5. Student Health Information (Optional)
- 6. Passport Information
- 7. Travel Information
- 8. Participant Agreement

#### Choose Assessments to Show:

No matching assessments found.

#### Choose Learning Content to Show:

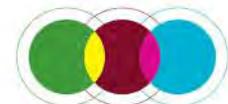
No matching learning content found.

#### Other Options:

- Advisor Approval(s)
- Reviews
- Display Process Elements Due Dates

Next Cancel

- Under **Materials to Show**, select **Check All**.
- Under **Questionnaires to Show**, select **Check All**.
- Leave the remainder blank
- Scroll to bottom of screen, hit **Next**.



# Audit Results

## Batch Processing : Progress Audit

Search Search Results

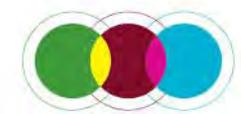
Following is a progress audit for signature documents, material submissions, questionnaires and recommendations. x

[Return to Audit Options](#) 

[Check All](#) | [Uncheck All](#)

[View all materials from Programs and through International Programs](#)

Status	Materials	Questionnaires
	Sexual & Other Forms of Unlawful Harassment Policy	
	Conduct Code	
	Alcohol & Drug Policy	
	4. Smart Traveler Enrollment Program	
	5. Student Health Information (Optional)	
	8. Participant Agreement	
	6. Passport Information	
	7. Travel Information	
	1. Emergency Contact Information	
	2. Self-Identification Form	
	3. GeoBlue Insurance	
<input type="checkbox"/>	<a href="#">Casper, Rosa</a>	Pending <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Epstein, Mallory</a>	Pending <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Epstein, Samantha</a>	Pending <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Fogarty, Samuel</a>	Pending <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Guo, Lynn</a>	Pending <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Herbert, Jordan</a>	Pending <input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Hickernell, Sarah</a>	Pending <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>



# What to do with Audit Results

1. Send an email to students who have forms outstanding (you can select the students)
2. Print the information
3. Export the results of the audit

Check All | Uncheck All

		Sexual & Conduct	Alcohol & 4. Smart	5. Studen	8. Partici	6. Passpo	7. Travel	1. Emerg-	2. Self-Id	3. GeoBlt
<input checked="" type="checkbox"/>	Casper, Rosa	Pending	<input type="checkbox"/>							
<input type="checkbox"/>	Epstein, Mallory	Pending	<input type="checkbox"/>							
<input checked="" type="checkbox"/>	Epstein, Samantha	Pending	<input type="checkbox"/>							
<input type="checkbox"/>	Fogarty, Samuel	Pending	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
<input type="checkbox"/>	Guo, Lynn	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Herbert, Jordan	Pending	<input type="checkbox"/>							
<input type="checkbox"/>	Hickernell, Sarah	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Huther, Sophie	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	MacManus-Spencer, Laura	Pending	<input type="checkbox"/>							
<input type="checkbox"/>	Marmen, Erin	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Maung, Jessica	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Maung, Jessica	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	O'Hora, Heidi	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pagano, Alexandra	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Pagano, Alexandra	Pending	<input type="checkbox"/>							
<input type="checkbox"/>	Pisano, Maxwell	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Riley, Rachel	Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Taslitz, Rebecca	Pending	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Toolan, Mitchell	Pending	<input checked="" type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	Van Nostrand, Maria	Pending	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

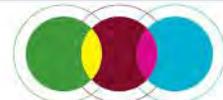
Send Email to Marked | Print | - Export Options -

1

1

2

3



# Updating the Union Programs Non-IP Programs Query – Individual Student

- After a student has completed the required paperwork for your department, you can update the student status from **Pending** to **Processed**

Casper, Rosa ([Edit Profile](#))  
 Union Programs not through International Programs  
 Winter, 2018  
 Status: Pending  
 Program Enrollment Applicant

Created: [02/06/2018](#) (by Applicant)  
 Last Updated: [02/06/2018 @ 08:56:52 PM](#)  
 Last Viewed by Applicant: [02/06/2018](#)  
 ID# 23502

[\(add principal application\)](#)

Overview | **Comments** | **Status** | Reviews | Profile | History Log | Email | Itinerary | Questionnaires | Materials | Resources | Assessments

Documents | Advisor Approval(s) | Journal | Credit Transfer

-- Add tag to application --

[Print Application](#)

Application Summary:						
Item:	Received					Total
	Advising	Pre-Decision	Post-Decision	While Abroad	Returnee	
Signature Documents	0/0	3/3	0/0	0/0	0/0	3/3
Material Submissions	0/0	0/0	0/0	0/0	0/0	0/0
Questionnaires	0/0	8/8	0/0	0/0	0/0	8/8
Assessments	0/0	0/0	0/0	0/0	0/0	0/0
Resources	0/0	0/0	0/1	0/0	0/0	0/1
Academic Advisor Approvals						0/0



# Updating the Union Programs Non-IP Programs Query – Individual Student

- After a student has completed the required paperwork for your department, you can update the student **status** from **Pending** to **Processed**

Application : Status

Use the tabs below to view and change information for this application

Casper, Rosa (Edit Profile)  
Union Programs not through International Programs  
Winter, 2018  
Status: Pending  
Program Enrollment Applicant

Overview Comments Status Reviews Program Enrollment Applicant

Assessments Documents Advisor Approval(s)

— Add tag to application —

Application Status

Status: Pending

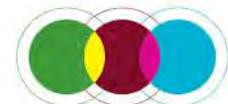
Deadline: 11/30/2018  
Waive until: mm/dd/yyyy

Decision Date: 12/01/2018 (This date is specific to this program)

Created: 02/06/2018 (by Applicant)  
Last Updated: 02/06/2018 @ 08:56:52 PM  
Last Viewed by Applicant: 02/06/2018  
ID# 23502

[add principal application]

Questionnaires Materials Resources



# Updating the Union Programs Non-IP Programs Query – Batch Status Change

- Click on the name of the query you created (see page 16)

## Administration : Home

Admin Settings

Share

Below are several administrative areas that allow you to manage your programs, applications, applicants, as well as

### Tasks

Task List

New Task

Settings

Subject

Due date

Assigned to

### My Queries & Reports

View folder ▾

Uncategorized

Moved checked 1 ▾

Saved Query

Actions

**18WI - Union Programs - NonIP**

Union Programs non-IP Programs

 Shared Queries



# Updating the Union Programs Non-IP Programs Query – Batch Status Change

- From **Options**, select **Batch status change**

Search : Results Search Search Results

Following is a listing of applications that meet your search criteria.

You searched for all applicants, within Outgoing programs.

Options - Progress Audit - Group by -

Search results based on application itinerary.

Name	Status	Program	Term
Abarbanel, Lily R	Confirmed Participation	Germany - Spring Term (ID 18443 - not ranked)	Spring, 2017
Abdow, Erik M	Confirmed Participation	England (London) - Spring Term (ID 11246 - not ranked)	Spring, 2015
	Wait Pool	France (Lille) - Winter Economics Exchange (ID 16779 - not ranked)	Winter, 2015
Aboulafia, Jacqueline R	Confirmed Participation	Italy (Florence) - Spring Term (ID 12701 - ranked 2)	Spring, 2016
	Wait Pool	Greece - Fall Term (ID 11389 - not ranked)	Fall, 2015
	Confirmed Participation	Civil Rights Public History - Winter Break Mini-Term (Odd Years) (ID 12676 - not ranked)	Winter Break, 2015
Abu Hawwash, Kinda	Pending	Greece - Fall Term (ID 23276 - not ranked)	Fall, 2016
Adams, Kiley E	Confirmed Participation	Czech Republic - Fall Exchange (ID 17051 - ranked 1)	Fall, 2016
	Wait Pool	New Zealand - Winter Break Mini-Term (ID 11393 - not ranked)	Winter Break, 2015
Adams, Savannah R	Confirmed Participation	England (London) - Spring Term (ID 11264 - ranked 1)	Spring, 2015

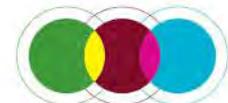
Search : Results Search Search Results

Following is a listing of applications that meet your search criteria.

You searched for all applicants, within Outgoing programs.

Back

Send email	1-	Group by -	application itinerary.
Send SMS (text message)			Status
Text export			Program
Excel export			Term
Create report			Confirmed Participation
<b>Batch status change</b>			England (London) - Spring Term (ID 11246 - not ranked)
Search results status			France (Lille) - Winter Economics Exchange (ID 16779 - not ranked)
Batch info edit			Wait Pool
Batch app tags			Italy (Florence) - Spring Term (ID 12701 - ranked 2)
Recs pending			Wait Pool
Batch material edit			Greece - Fall Term (ID 11389 - not ranked)
Batch attach file			Confirmed Participation
Batch workflow			Civil Rights Public History - Winter Break Mini-Term (Odd Years) (ID 12676 - not ranked)
Full export			Pending
			Greece - Fall Term (ID 23276 - not ranked)
			Confirmed Participation
			Czech Republic - Fall Exchange (ID 17051 - ranked 1)
			Wait Pool
			New Zealand - Winter Break Mini-Term (ID 11393 - not ranked)
			Confirmed Participation
			England (London) - Spring Term (ID 11264 - ranked 1)
			Provided Financial Waiver
			Cuba Winter Break Mini-Term (ID 12332 - not ranked)
			Wait Pool
			France (Lille) - Winter Economics Exchange (ID 16899 - not ranked)
			Confirmed Participation
			Community Service - Winter Break Mini-Term (ID 11120 - not ranked)
			Confirmed Participation
			France (Lille) - Winter Economics Exchange (ID 16206 - not ranked)
			Winter, 2016



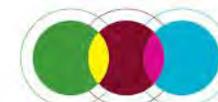
# Updating the Union Programs Non-IP Programs Query – Batch Status Change

1. Select/Unselect the students whose status you want to change by clicking on the white triangle (refer to pages 8-9)
2. From the drop-down menu, **Change checked to:** select **Processed**

Batch Processing : Status Update Search Search Results

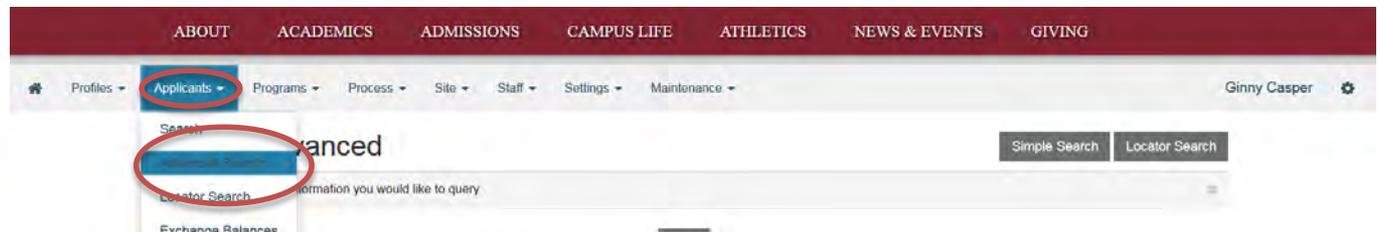
Use this form to apply an application status to the checked applications listed below. X

1. **Batch Application Status Edit:**  
(click arrow to show applicants)  
**Change checked to:**  
Processed  
- Select -  
Advising  
Pending  
GPA too low  
Deferred Application  
Waitlist  
Wait Pool  
Accepted  
Accepted - NonUnion-Conditions  
Deferred Acceptance  
Committed  
Confirmed Participation  
Provided Financial Waiver  
Committed - Deferral & deposit to be paid next year  
**Processed**  
Rejected  
Not Accepted  
Low GPA  
Points  
GPA Not Maintained
2. Update Cancel  
STREET SCHENECTADY, NY 12308  
3000 Map & Directions  
CONTACT ADMISSIONS:  
Grant Hall  
807 Union Street  
(518) 388-6112  
Request information

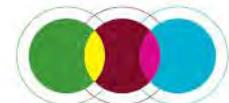
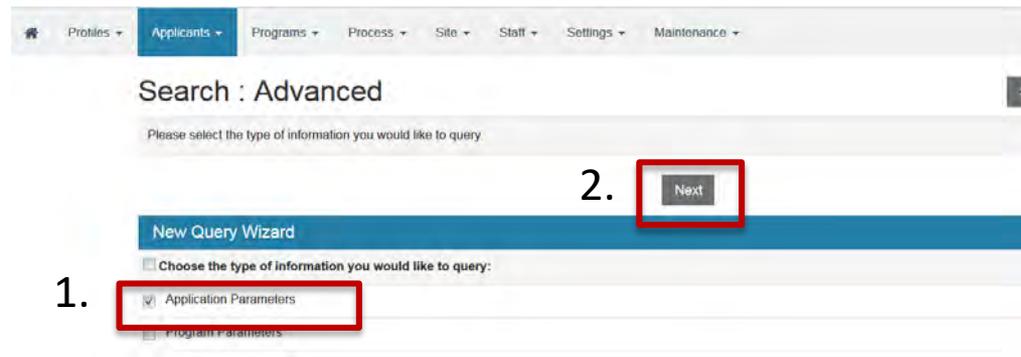


## Reviewing Files that are Processed – Individual File

- If you need to go back to review the names, to find them you will need to do an advanced search by going to the **Applicant** drop-down menu and selecting **Advanced Search**



1. Select **Application Parameters**
2. Click **Next**



# Reviewing Files that are Processed – Individual File

- If you need to go back to review one name, to find it, go to the **Applicant** drop-down menu and select **Search**



1. Under **Applicant Name**, enter all/part of the name
2. Make sure to check the box **Include withdrawn applications**
3. Press **Search**

Search : Simple Advanced Search Search Results Locator Search

Below, you can search for applications based on multiple criteria. List boxes allow you to select multiple values by holding the Ctrl/Cmd key while clicking. Results are returned based on applications that match all selected criteria. For a search based on specific application response data and program parameters, use the Advanced Search. ×

Search

Search Applications:

1. **Applicant Name:**  **Program Name:**

**Program Terms:**

- William Cady Stone 2017
- Winter 2019
- Winter 2018
- Winter 2017
- Winter Break 2017

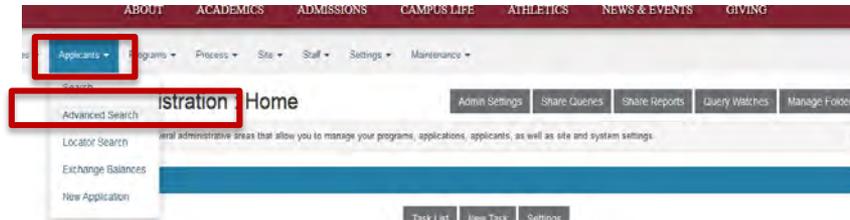
2.  **Include withdrawn applications**

3. Search

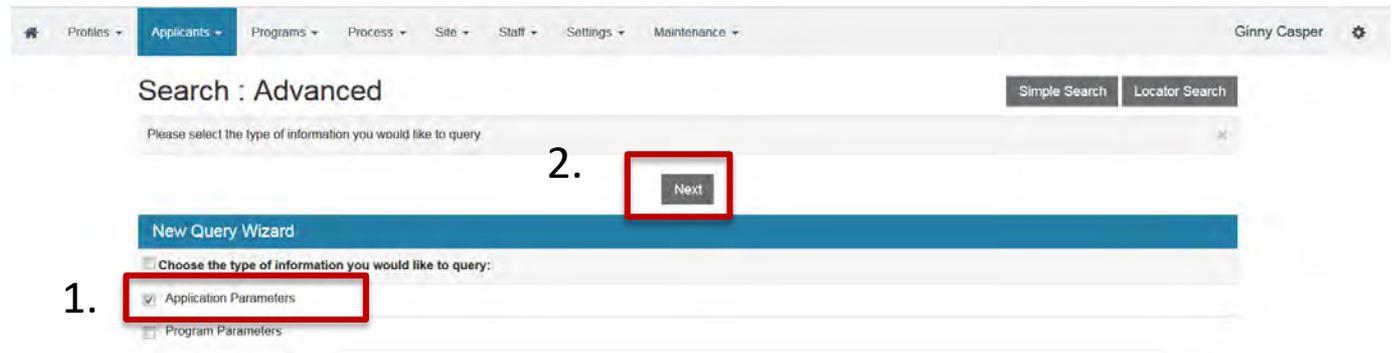


# Reviewing Files that are Processed – Group

- Go the **Applicant** drop-down menu and select **Search**



1. Select **Application Parameters**
2. Click **Next**



1.  Application Parameters  
 Program Parameters



# Reviewing Files that are Processed - Group

1. From **Program Types**, select **Program Enrollment**
2. From **Application Parameters**, choose the term(s) [to select more than one term, hold down the control key and use the mouse to make selections],
3. From **Application Status** select **Processed**
4. Scroll down and from **Programs & Locations**, select **Union Programs not through International Programs**. Press **Search**.

Search : Advanced Simple Search

Use the form below to search for applications based on one or more criteria. The list boxes allow you to select multiple values within them by holding the Ctrl/Cmd key while clicking.

BACK Search

---

Show:

User Classification:  All  Union Only  Non-Union Only

**1. Program Types:**  Book Manager  Incident Repo  Travel Registr  Program Enrollment

By Institution: (keyword search)

Exchange Status:  All  Exchange  Non-exchange

**Application Parameters:**

Application Cycles:  All  Fall 2016  Fall 2017  ISA Program 2017

Application Phase:  All  Advising the Decision  Post Decision

**3. Application Status:**  Advising  Pending  Waitlist  Accepted  Advising (no aliases)  Pending (no aliases)  Waitlist (no aliases)  Accepted (no aliases)  GPA too low  Deferred Application  Wait Pool  Accepted - NonUnion-Conditions  Deferred Acceptance  Committed  Rejected  Withdrawn  Committed (no aliases)  Rejected (no aliases)  Withdrawn (no aliases)  Confirmed Participation  Not Accepted  Not participating after confirming participation  Provided Financial Waiver  Low GPA  Accepted, Not 1st Choice  Committed - Deferral & deposit  Points  Accepted - Did not confirm  Incomplete Application  Incomplete Application  Processed  GPA Not Maintained

**Programs & Locations:**

Program:  Senegal - Summer break (six-term)  South Africa - Winter Break Mini-Term  Spain - Summer Break Mini-Term  Spain (Cordoba) - Winter Break Mini-Term  Spain (Seville) - Fall Term (Old Year)  Tanzania - Winter Term (even years)  Turkey - Fall or Winter (Spring)  Union Programs not through intern  Uruguay - Spring Term  Vietnam - Spring Term

Program Groups:  All  Uncategorized  Terms Abroad - Union  Terms Abroad - PGE  Mini-Terms  Non-Union Programs  IBM  Independent Study Abroad (ISA) Pro  International Exchange Students/Lar  Incoming F-1 visa international stud  Post Decision

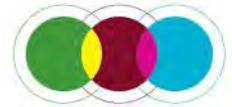
City:  All  Akhen  Accra  Ados Ababa  Agra  Akuspen Hills  Aleppey  Amman  Amsterdam  Andasibe

Country:  All  Argentina  Australia  Austria  Belgium  Belize  Bolivia  Brazil  Cambodia  Canada

Region:  All  Africa  Asia  Australia/Pacific Islan  Central America  Europe  Latin America  Middle East  North America  Oceania

Include Program Locations (this expands the search to also include all applications that are part of a program having any program-level location assignment selected above.)

BACK Search



## Need Assistance?

For assistance in accessing TD contact:

**Varvara Meshkov or Ginny Casper**

**International Programs Office**

**Old Chapel, 3rd Floor**

Phone: 518-388-6002

Email: [meshkovv@union.edu](mailto:meshkovv@union.edu)

[casperr@union.edu](mailto:casperr@union.edu)

