SUPPORT PORTAL

📖 **Legacy Program Builder**

This article explains the functionality of each tab of the legacy program builder.

Applies to: TDS17;TDS18

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Note that, depending on the program type you've selected and your permissions, some tabs will be available while others will not. The tabs listed include all possible tabs a[...]outgoing program.

The Legacy Program Builder interface enables the Admin to edit an existing program in the catalog. If you are using TDS 18.0 or a later version, also see our article on the [...] Wizard for our updated method for program building.

You can access this interface from the following.

1. Go to *Programs > List All*. This opens a new page with a list of all the programs currently in your catalog.
2. Click the pencil icon located to the right of the name of the program that you want to edit. The Program Builder page for that program opens with several tabs.
3. Edit the information related to a program by clicking the tabs under the header.

General

This tab includes a general description of the program such as the name of the program, the program's home page URL, and so on. Using this tab, you can change the prog[...] provide the URL for the home page of the program, if any, in the space provided; and include internal program notes in the space provided.

You can make the program brochure available in public program searches by selecting the check box, **Active**.
Note that the Active checkbox is not what allows/prevents a user from applying to the program:
If there is an active Application Cycle that matches this program's available terms AND the program brochure URL shows up on a webpage somewhere, a person will be ab[...]
You should uncheck all the terms for an inactive program and ensure that a URL to the brochure page does exist anywhere else on your site to ensure users cannot not app[...]

Settings

This tab enables you to select the settings for a program. Using this tab you can perform the following tasks:

- Select the program type, select the status of new applications, and provide the Access URL for the program. When applicants click this link, they are directed to the Brochure page.
- Generate HTML with specific text for the 'Apply Now' function
- Create Applicant Instructions that will appear on the application page during the specified phase

    - The four plain text fields labeled for the application phases are used for entering in the text that is desired on the application pages of the applicants to the pr

        The text in this field can include HTML tag to change the style of the text or include hyperlinks. It may also be necessary to wrap the paragraphs in <P> and have multiple paragraphs of instructions that you wish to be separated when viewed by the applicant.

        The post-decision phase instructions can also be appended to the decision letter for accepted applicants by marking the checkbox under the post-decision pl instructions.

- Control the Journal settings for the program
- Set the required number of recommendations for each recommendation type
- Enable or disable advising requests, advising requirements, and applicant parameter requirements
- Enable or disable the 'Save This' button to permit applicants to save programs of interest to their profile
- Allow unlimited applications - by selecting this box, the administrator is allowing applicants to override the maximum number of applications (set at the system setting allowed during the term. Selecting this box does not allow for unlimited applications to the specific program UNLESS the System Features setting (Settings > Syste Process Options tab) is checked to allow multiple applications for the same program in the same application cycle.
- Allow applicant attached documents (TDS15 and higher) - configure whether applicants can attach documents through the Attached Documents panel of their applic Configure the phase at which the Attached Documents panel appears, and which document types are available. This portion of the Settings tab appears if you have document types in *Settings > System Features > Process Options*.

Dates

By default, deadlines and decision dates are pulled from the information you enter when creating app cycles. This tab enables you to change those dates on the program le is also where the start date and end date for each application cycle can be defined for this program. Start and End dates must be entered in order for application itinerary re created. These result in the applications moving into the 'While Abroad' phase. There is a feature that will allow you to 'Apply Dates to multiple programs' that you can use t You can use the dates specified by the sponsors of the program to schedule your deadlines if this program is subscribed to the Study Abroad Directory. You can find these header Sponsor Date Records for this Program.

To adjust the deadline or decision dates or to add start and end dates, perform the following steps.

1. Select an app cycle from the drop-down list box at the bottom of the page under the header **Add New Date Record.** Click the **Add Term** button. A new section appe page where, you can add the dates for the app cycle that you have selected.
2. You can edit the dates for a term by clicking the pencil icon located to the right. A new section appears on the page, where you can edit the start and end dates, app deadline, decision date, and term notes. The system will also automatically create a corresponding program itinerary (in the Itinerary tab) with the set start/end dates uncheck the "Create program itinerary record with these dates" option.

Note: You can also apply these dates to multiple programs. While editing the date record, click the arrow located on the header **Apply Dates to Multiple Programs**. A list Select the programs to which you want to apply these dates, from the list. Then, select the sets of dates you wish to apply by selecting the check boxes below the list box. T batch apply the selected dates (and active status if chosen) to the same application cycle's date record for the selected programs. If a date record for the app cycle does no for a selected program, one will be created by this action.

General	Settings	Dates	Brochure	Locations	Terms	Parameters	Requirements	Alumni	Feedback	History	Budget Sheets	Announcements
Exchange Balances	Foreign Courses	Directory	Contacts	Itinerary								

Currently accepting applications for Fall 2018; Spring 2018-2019

Program Dates:

Term	Year	Start date	End date	App Deadline	Decision date	Active	A
Summer	2016	06/01/2016	07/31/2016	02/28/2016 *	03/30/2016	☑	
Academic Year	2016	08/01/2016	05/31/2017	04/30/2016 *	07/30/2016	☑	
Fall	2016	08/01/2016	12/03/2016	07/13/2016 * **	12/13/2015	☑	
Spring	2018-2019	01/15/2018	05/11/2018	09/01/2017 **	08/31/2017	☑	
Spring	2016	01/15/2016	05/11/2016	10/01/2015 *	12/13/2015	☑	
Fall	2015			12/31/2015 *	12/31/2015	☑	

* Indicates deadlines that have expired. You may override this by editing it here.

** Indicates a rolling admission application cycle where applicants will be moved into the post-decision phase immediately if they are accepted into the program.

Add New Date Record:

[Please select a term ▾] [Add] (Click here to include all application cycles)

Brochure

This tab enables you to construct the program brochure content, which is available for the applicants to view when they are searching for a program. You can create a broc provide a link to the same in the text box Friendly URL Label. Alternatively, you can build the brochure within the application using rich text formatting and uploaded images this using the WYSIWYG Editor provided on this tab.

If you're utilizing the Program Wizard functionality, you can migrate your existing brochure content into the Program Wizard using the "Migrate Brochure" button.
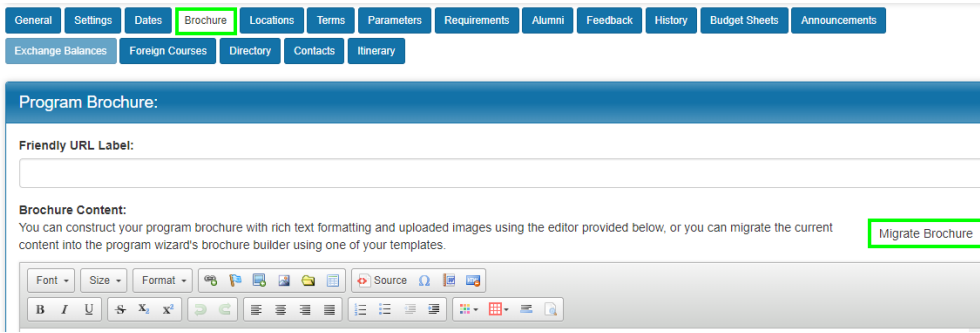

Clicking this will automatically capture any content in the existing legacy brochure builder and migrate it into the new Program Wizard builder. The migration will capture mos and styling. The text content from the brochure will be added to the Wizard as a single content widget. Photos and embedded videos will be separated into individual photo widgets respectively. All content will be added to each section of the brochure.

Locations

This tab enables you to assign the location(s) of this program. You can use the field box to search for a location. Results will appear as you populate the box. You can selec one location from the available list box by holding down the Control/Command key on your keyboard while clicking the locations. Click "Add selected" to apply the selected program. To remove any location from the "Currently assigned" list box, click the 'x' icon to the right of the location name. If this program is subscribed through Study Abroa locations assigned to the program by the sponsor are displayed above the location selection interface. You can use the Sponsor Assigned Locations field to assist you when locations to your program.

A program's assigned locations will be available to administrators that are creating program itinerary records.
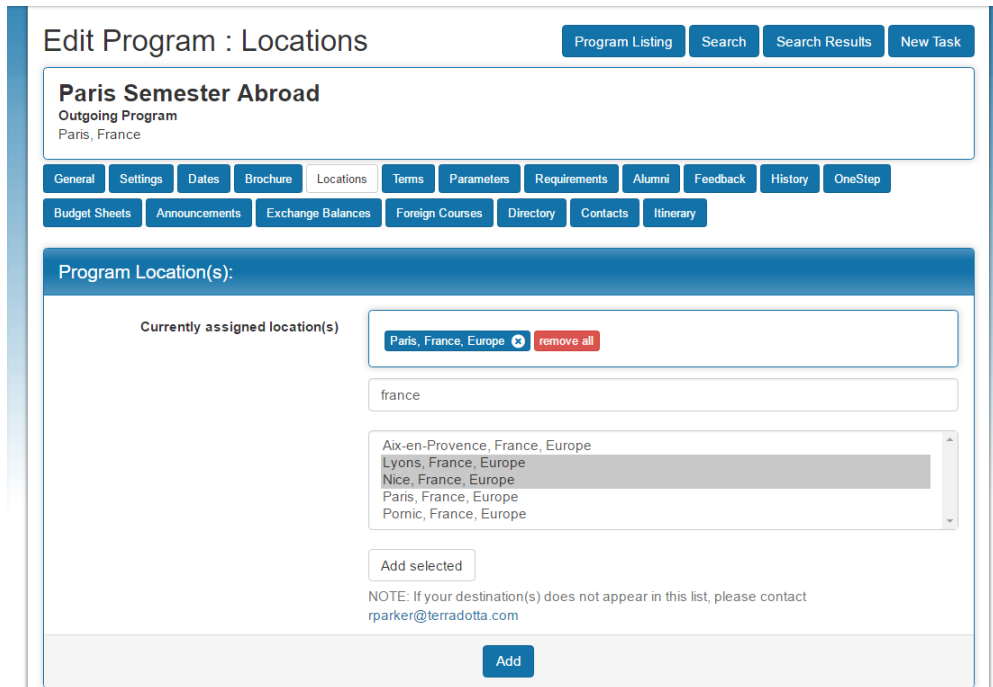
Terms

This tab enables you to select terms for the program. To do this, select the check box preceding the name of the term. If this program is subscribed through Study Abroad D terms assigned to the program by the sponsor are displayed above the term selection interface. You can use the Sponsor Assigned Terms field to assist you when you assig terms to your program.

| General | Settings | Dates | Brochure | Locations | Terms | Parameters | Requirements | Alumni | Feedback | History | Budget Sheets |

| Announcements | Exchange Balances | Foreign Courses | Directory | Contacts | Itinerary |

Choose Term(s) for Paris Semester Abroad:

Term(s)

☐ Check/Uncheck All

☑ Academic Year
☐ Alumni
☑ Fall
☐ Fall Break
☐ Fiscal Year
☐ J-Term
☐ Maymester
☐ Ongoing
☐ Perpetual
☐ Semester 1
☐ Semester 2
☑ Spring
☐ Spring Break
☐ Summer
☐ Summer II
☑ Winter
☐ Year

Update

Parameters

This tab enables you to assign program parameter values. If this program is subscribed through the Study Abroad Directory, you can assign the parameter values in accord
sponsor-assigned program parameter values.
To edit a program parameter, click the pencil icon located to the right of the parameter name.

To delete a program parameter, click the red 'X' to the right of the parameter name (see note below).

When you edit a parameter, an option is available at the bottom of the page to apply this value to multiple numbers of programs. Select the programs to which you want to a
from the list box. To select multiple values, hold the Control/Command key while clicking.

Note: After a program has had a program parameter value assigned to it, it may be desired to clear it out (remove the value that was assigned). This cannot be done by clic
pencil and removing the current value and updating. The administrator is instructed to select a valid option value.

A program parameter can be cleared out on the 'parameters' tab of the program builder by clicking on the red 'X' under the actions column (instead of the edit pencil). This c
the program parameter. It only removes any assigned parameter values for that parameter for that program.

Requirements

This tab provides a list of process elements (materials, learning content, assessments, and questionnaires) that are applicable to the application. These materials are organ
application cycle. When you click on this tab you will be prompted to enter the application cycle for which you would like to see the requirements, as these can change from
 These documents are required at different stages of the application.

| General | Settings | Dates | Brochure | Locations | Terms | Parameters | Requirements | Alumni | Feedback | History | Budget Sheets |
| Announcements | Exchange Balances | Foreign Courses | Directory | Contacts | Itinerary |

Choose Term/Year: Please select a term ▼

Requirements for Fall, 2018

Due Dates with * are program specific

Materials for Outgoing Programs

Material Title	Type	Due Date	Program Specific?	Internal/External
Advising				
Pre-Application Meeting	Material Submission		No	Both
Advising Prep	Signature Document		No	Both
Pre-decision (Application)				
Application Fee	Material Submission ✉	03/01/2018 ✏	No	Both
Copy of Transcript	Material Submission ✉	⊕	No	Both
Consent to View Transcript	Signature Document	03/02/2018* ✏	No	Both

To see a preview of the documents, click the names of the documents.

Due Dates: To set the due date for an element, click the plus "add" button or the edit pencil (if a date has already been entered). This will bring you to the "Batch Applying F Element Due Dates" screen where the new date can be applied to multiple process elements of the same type for that program.

- Any date entered here will override the application cycle-level due date set in **Process > App Cycles** for the chosen element(s). Dates set at the program level will b an asterisk (*).
- You can remove an existing due date by blanking out the date field on the update screen and updating the page.
- Process element due dates serve only as a visual indicator on the applicant home and application view and will not lock an applicant out of the process element unti application deadline has passed.

Alumni

This tab provides information on the participating alumni of the program. The information is classified under three tabs depending on the status of the information. They are

- Pending
- Published
- Rejected

You can view the information by clicking the appropriate tabs. It also provides a URL to view a list of published alumni information. This URL can be used as a link on the pr brochure, using which potential applicants can contact or view the alumni of the program.

Feedback

The Feedback tab enables you to publish applicant responses to testimonial and program questionnaires for applications to the program. You can publish a testimonial or re Programs Brochure page by clicking Publish located to the right of the applicant response. To take a testimonial or review off a published page, click Unpublish.

History

This tab is a running list of all changes that are made to the program. You can look here to see what has been added/removed from the application to the program, who ma and when they made it.

OneStep

This tab allows for a simplified version of an application/registration in Terra Dotta software that can be configured for some program types. Applicants/Registrants who use form will see all requirements on one page to make the process as straightforward as possible. The OneStep is ideal for collecting student and faculty travel registrations th the traditional 'application' process, but are used to simply collect basic travel dates, locations and a few other items. It is in this tab that admin may configure proxy registra

| General | Settings | Dates | Brochure | Terms | Parameters | Requirements | History | OneStep | Announcements |

OneStep Configuration Settings

OneStep registration

Enable OneStep registration for this ☑
program

Generate HTML for Apply Now button
named

| Apply Now | 🖺 |

```
<button type="button" class="btn btn-primary" onclick="location.href='index.cfm?
FuseAction=OneStep.Apply&amp;Program_ID=18705">Apply Now</button>
```

🔗

Copy the button HTML code above into your custom pages to provide users with a quick
means of OneStep registering for this program.

Applicant is logged out after   ○ Yes ● No
submission:

Term for Applications Created: [Academic Year ▼]

Included applicant params

Available   **Selected**
Showing all 1   Showing all 8

| Filter | | Filter |

| → → | | ← ← |

US State		Allergies
		Class
		Diabetic
		Disciplinary Action
		Ethnicity
		Financial Aid Student

Included Address Types

Included Address Types   ☐ Permanent Adress *
                              ☑ Emergency Contact *
                              * Required Address

Proxy Registration

Enable proxy OneStep registration for ☐
this program

Receipt Email

Email Subject | Travel Registration |

Email Title | Travel Registration |

Email log name | New Travel Registration Generated |

Additional note in email body

| |

(4000) characters left

[Update]

Budget Sheets

The Budget Sheets tab on the program builder enables you to create a budget sheet for each term your program is offered. Select a term from the drop-down list box then
button located next to the list box. The selected term will now appear in the "Program Term Budget Sheets" section below.

There are four user types that can be associated with each budget sheet: 'Internal, External, Exchange (Internal), Exchange (External)'.
Check the box for each type of user you'd like to be included in this term's budget sheet for this program.

In the Actions column, you can

- export the budget sheet as an MS Excel file by clicking the Excel icon located to the right of the name of the budget sheet.
- click the red 'X' icon to delete a budget sheet.
- click the pencil icon to edit a budget sheet. This will open a new page:
    - From the here, you can insert a budget parameter previously created in *Settings > Budget Params* to the budget sheet from the "Parameter" drop-down list b
      Selected parameters appear under the "Budget Item" heading below.
    - You can include any notes you may need in the WYSIWYG Editor at the bottom of the page. These notes will be publicly accessible in the Budget Sheet secl
      program brochure.

- Whether or not you are able to edit the dollar amount for each item is determined by the type of budget parameter configured in *Settings > Budget Params*. F information on editing budget parameters, refer to the KB article "Managing Budget Parameters."
- You can click the red 'X' to delete an item from the budget sheet.

Note: Incident Report and Travel Registration program types will not have access to the Budget Sheet tab.

Announcements
This tab enables you to view and add announcements related to the program. Program announcements appear on the Application page and can be used to provide update specific to the applicants' requested program(s). After the decision date, accepted applicants can receive new information through the announcements.

This tab displays the following

- Date on which the announcement was posted
- Date on which the event is scheduled to take place
- Date on which the announcement expires, and also any action taken on the announcement.

To add a new announcement, perform the following steps

1. Click Add. A New Program Announcement page opens.
2. You can provide the details of the announcements and then click the save button at the bottom of the page to save the information. Click Reset to make fresh chang ignore the changes and return to Program Announcements home page.

Exchange Balances
This tab is enabled only when the program is marked as Exchange Available. This tab enables you to view the ratio and quotas of the incoming and outgoing applicants. Th only for the records. It does not limit the number of applications that can be filed for the program.

Foreign Courses
This tab enables you to list all courses applicable to a program in a foreign location. It groups the courses under the headings of Standardized and Unstandardized courses Standardized courses - are the courses that have been entered by the Admin into the foreign course offerings of the program. You can make the list of foreign courses avail applicants by selecting the relevant check box from the brochure. You can search a course by providing the course code or title and clicking Search located at the bottom of Cancel to ignore the changes and Reset to make a fresh search.

Unstandardized courses - are the courses that are manually entered by the applicants while creating a Credit Equivalency Request. The staff members review it and decide become a standardized course or an existing course can be used in the place of the unstandardized course.
Select the course that you want to change by selecting the check box preceding the program code.

Option # 1- enables you to apply the selected course to existing list of foreign courses. Select a course from the drop-down list box and click Apply Checked to Selected Co updates the credit equivalency request of the applicant with the existing foreign course.

Option # 2- enables you to create a new foreign course record for the selected course. Click Apply Checked as New Foreign Course to create the record.
To edit a foreign course, click the pencil icon located to the right of the course name.

To delete a foreign course, click the red 'X'

To add a new course:

- Click **Add New Course** at the top on the left side of the Foreign Courses home page.
- A new page opens where you can provide details of the new program.
- Click **Update** at the bottom of the page to update the changes made.

Directory

This tab provides information if the program is associated with a Study Abroad Directory sponsored program. If the program is not associated with any, this tab provides you linking your program to a Directory-sponsored program while retaining your current program data.

1. Click **Link to a Study Abroad Directory sponsored program**. This opens a search tool for finding programs available in Study Abroad Directory.
2. Click the magnifying glass icon located to the right of the program name to view the program. This opens the program brochure.
3. Click **Link to this program**. Now the program built using your Program Builder is linked to this sponsored program in the Study Abroad Directory.

You can also send the program name, notes, and brochure content to the Study Abroad Directory site if you want to open the program so external applicants could participa then created as a program under the name of your sponsor. To do this, click Publish this program to the Study Abroad Directory.

If the program is associated with a Study Abroad Directory-sponsored program, this tab provides you an option of updating your program using the link Update Your Progran disassociate your program from a Directory sponsored program using the link Unlink a Study Abroad Directory sponsored program. A dialog box appears asking you to con action. Click Ok to continue or Cancel to discard the action.

Contacts

This tab enables you to perform the following tasks:

- View/Add/Edit/Delete the contacts associated with this program
- Enter email addresses for people who should be notified when new applications are created for this program, someone requests more information about the progran saves the program to their profile.
  - Please note that notifications for new applications are delivered to the listed individuals only when the *applicant* creates a new application for that program. T sent when an advising application is created as a result of required advising - nor are they sent when an admin creates an application for a student.

To edit the details of a contact, click the pencil icon located to the right side of the contact name.

To delete a contact, click the red 'X'

If you want to edit any user information, click the Edit user information link located next to the name of the contact.

If you edit these details, all instances where the user's information is used are modified

To add a new contact, click the **Add Contact** link located to the right of the page above the Contacts header. A new page opens. You can search for a contact using the me name, last name, and e-mail address. You can add a member as contact using the campus login ID also.

You can search for a contact using the member's first name, last name, and e-mail address. You can add a member as contact using the campus login ID also.

You can also add a contact manually by performing the following tasks:

- Click the **Add a contact Manually** link. This opens a new section on the page.
- Provide all the details in the spaces provided
- Click **Add Contact** at the bottom of the page.

You can apply the contact to multiple programs by selecting the programs from the available list box. Then click **Add Contact**. To select multiple programs, hold the Control key while clicking.

Itinerary

The program itinerary records for a program are used as the template for the application itinerary records when an applicant applies to that program. The itinerary tab allow each leg of a trip.

Program Itineraries:

▶ Spring 2018-2019	Start Date	End Date	Actions
▼ Academic Year 2016	Start Date	End Date	Actions
Dijon, France (Europe)	08/01/2016	05/31/2017	✏️ ✖
Nice, France (Europe)	08/01/2016	05/31/2017	✏️ ✖
Paris, France (Europe)	08/01/2016	05/31/2017	✏️ ✖
▼ Fall 2016	Start Date	End Date	Actions
Dijon, France (Europe)	08/01/2016	12/03/2016	✏️ ✖
Nice, France (Europe)	08/01/2016	12/03/2016	✏️ ✖
Paris, France (Europe)	08/01/2016	12/03/2016	✏️ ✖
▼ Spring 2016	Start Date	End Date	Actions
Dijon, France (Europe)	01/15/2016	05/11/2016	✏️ ✖
Nice, France (Europe)	01/15/2016	05/11/2016	✏️ ✖
Paris, France (Europe)	01/15/2016	05/11/2016	✏️ ✖
Paris, France (Europe)	04/01/2016	04/26/2016	✏️ ✖
Paris, France (Europe)	05/02/2016	05/11/2016	✏️ ✖
▼ Summer 2016	Start Date	End Date	Actions
Dijon, France (Europe)	06/01/2016	07/31/2016	✏️ ✖
Nice, France (Europe)	06/01/2016	07/31/2016	✏️ ✖
Paris, France (Europe)	06/01/2016	07/31/2016	✏️ ✖

Add New Program Itinerary Record:

[Please select a term ▾] [Add]

(Click here to include all application cycles)

To add a program itinerary:

1. Ensure that the program has a date record for the appropriate application cycle ("Dates" tab)
2. In the Itinerary tab, select the appropriate application cycle and choose Add Itinerary Record
3. Fill in the start and end dates for one location within the full itinerary. Then, choose the location from the drop-down Location list. (This list includes locations chosen Locations tab of the program builder.) When finished, click Next.

To edit an existing program itinerary, click the edit pencil next to any itinerary segment. You can adjust the dates or location for any particular portion of the itinerary record. portion of the itinerary entirely, click the red "x".

If there are existing applications for this cycle, a cascade wizard will offer to update these applicants' application itineraries to reflect the change.

Select any applications whose itineraries you wish to update, and click "Update". The application itineraries associated with these applications will be updated to reflect the program itinerary.