

Workshop URL: <http://nuw-iss-1.terradotta.com/>

No More Papercuts!

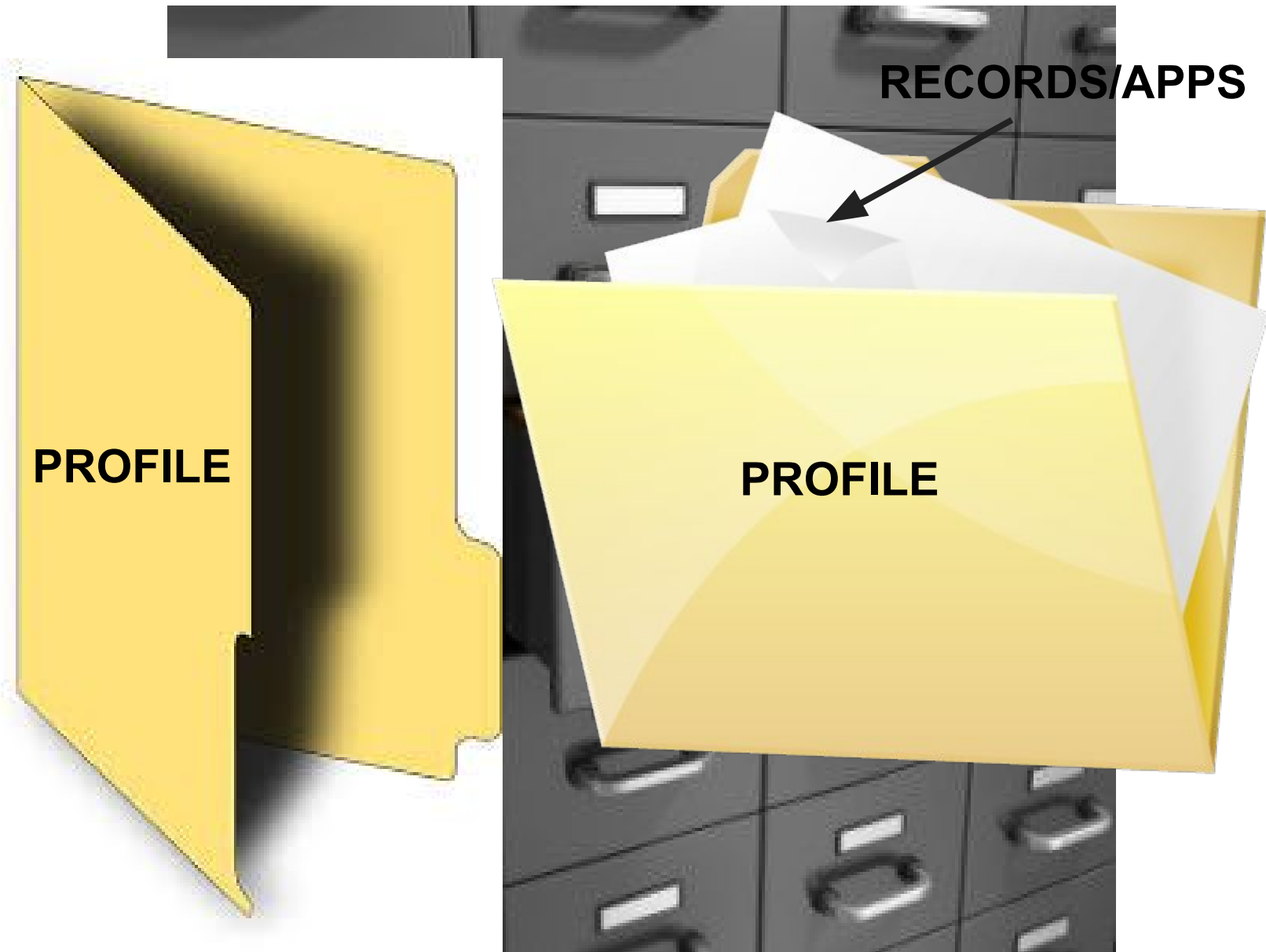


Queries & Reports in a Paperless World

Wireless Networks: PSAV_Event_Solutions
Password: terradotta



TERRADOTTA



Queries: What are they?

Also known as “Searches”, queries are a way to different parts of users’ electronic files to pull a selected group of users or applications/records together to review and process

- **Profile Admin -> Profile Search**
- **Record Admin -> Simple Search**
- **Record Admin -> Advanced Search**



Profile Searches

Profile Admin -> Profile search

- Searching for users and their bio/demo/academic info



Profile Searches

New Query Wizard

- **Profile/Core Parameters**

- Search by:
 - Name
 - Gender
 - Date of Creation or Update

- ~~**Program Parameters**~~

- **User Parameters**

- Search by User Parameters (displayed alphabetically):
 - Visa Type
 - Education Level
 - Country of Birth/Citizenship/Residence
 - Campus Site
 - Many more!



Record Search



Record search

- By name
- By program (process)
- By Term, Year
- Withdrawn records filtered out by default



Advanced Search

Record Admin -> Advanced Search

Step 1: Using the New Query Wizard, choose which category of filters to use

- Record/Application parameters
- Program parameters
- User parameters
- Complete/Incomplete submissions
- Questionnaire/Question Item responses



Advanced Search

Step 2: Select the criteria in each category to use for your search

- Selecting values in multiple boxes uses 'AND' logic
- Selecting values within a single box uses 'OR' logic



Search Results

Many options available from search results page

DON'T OVERLOOK THE OPTIONS MENU!!!

- Send an email or SMS message to the group
- “Batch” processing of apps in the group
- Progress Audit – see at a glance what had been completed and what is pending during each phase of the record/application process
- Reporting options



Saving/Editing/Sharing Queries

- Save a query
 - Saves the time needed to rebuild it
 - Updates itself each time you run it
- Edit a query
 - Corrects a mistake without starting over
 - Adjusts to changing circumstances
- Share a query
 - Provides targeted information to other site admin
 - Can be shared to specific staff members or groups

New User Workshop

Reports



What is a report?

Exporting data from the application/record search results

The query gets the applications/records and the report indicates the output columns, groupings, and other information to be displayed



Report Wizard

- Query results screen: Options > Create Report



The screenshot shows a horizontal bar with two dropdown menus. The first dropdown is labeled 'Options:' and has a red rectangular box around it. It currently displays '- Select Option -'. The second dropdown is labeled 'Progress Audit:' and displays '- Select Phase -'.

- Groupings
- Output columns
- Output format
- Saved reports just like saved queries

Accessing the Report Wizard

- Admin Home > My Queries & Reports panel

Administration : Home

? Below are several administrative areas that allow you to manage your programs, applications, applicants, as well as site and system settings.

[Admin Settings](#) [Share Queries](#) [Share Reports](#) [Query Watches](#) [Manage Folders](#)


My Queries & Reports


Saved Queries:







Uncategorized

☐ Check All

Move checked items to: - Choose Folder - ▼

☐  Katie's Pending Tasks

☐  New Pending Student Requests



Excel Exports

Sort and filter to organize data

Make charts and graphs

Pivot tables / complex statistical analysis



Query Watch

- Automatically runs a saved query/search at a set interval
 - Once, Monthly, Weekly, Daily, Hourly
 - Can set specific time
 - Can set specific duration
- Records differences between each time a search is run
 - Can configure to target ALL records in search results, records that fall IN the search results, and/or records that fall OUT of the search results
- Takes various actions based on that data
 - Create a saved export of search results
 - Send emails to designated email and/or to the users whose in the QW results



New User Workshop

- Additional resources
 - Translating Your Office Into TDS
 - <https://university.terradata.com/?go=ISSSPlanning>
 - Terra Dotta Support Portal
 - Knowledgebase
 - Chatter
 - Webinars
 - <https://university.terradata.com/?go=WebinarSched>



Thanks!



TERRADOTTA



TERRADOTTA