

Carta User's Manual for Faculty and Staff

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I. How to submit a program proposal

A. For Global Study Tours

1. Go to carta.agnesscott.edu
2. On the left-hand navigation, go to 'For Faculty and Staff'
3. If you are ready to submit your proposal, please click 'Submit Global Study Tour Proposal'. This will route you directly into the proposal application.
4. If you wish to read more about the proposal process, please follow the link provided. From the 'GST Faculty Proposal Portal', when you are ready to submit, please click 'Apply Now'. This will open the proposal application.
5. Once you have opened the proposal application, you will be asked to select a 'Term'. Please select the year in which you are applying, not for the semester/year in which you will teach your course. For example, if you are applying to teach a course in 2020, but are applying in 2017, you would select 2017.

At this point you should arrive at the Program Applicant Page (Pre-Decision). You will see four or five boxes with various labels, such as Application Instructions, Required Reading, and Required Forms. *The box titles are what the students see, so the titles are not necessarily applicable to you!*

Program Information	This box shows the application deadline for all required forms and supplementary documents. Please ensure your proposal form is marked as 'received' by this date.
Required Readings	You will find here any documents or information the Center for Global Learning thinks might be useful for you as you apply, including this document.
Required Forms	This is the most important part! Please complete the relevant proposal form (either new or repeat course).
Document Center	If you have any additional documents you wish to upload, you may do so here.

Requirements to Complete Your Application

The only thing that must be completed is the 'Global Study Tours Proposal' (new or repeat) under Required Forms. All other provided documents are for your information.

B. For Journeys

This section will be updated when the Journeys Proposal Portal is launched.

II. Logging into and navigating the system

Once you have opened an application or want to review student application information, you only need to log-in to the system.

1. Go to carta.agnesscott.edu
2. In the right-hand corner, click 'LOGIN (for existing users)'
3. Type in your ASC username (the part before the @ symbol)
4. Type in your ASC password

Use the black navigation panel to move through different parts of the system.

- Applicant - Click here if you have an application in the system and wish to interact with it.
- Applications - Click here if you have students applying for your course and you wish to find out more information about them.

III. Reviewing information shared with you by CGL

Queries and Reports

Queries ask the system to locate students based who meet the desired parameters (e.g. 'Which students have applied to ASC in Spain?', 'Which students have a valid passport?', 'Which students have a 3.0 GPA?'). Queries are constantly refreshed, so as soon as a student meets or ceases to meet the Query's criteria, she is added or removed from the list.

Reports are built from Queries. Reports show you specific information about the students who are on a particular query (e.g. 'Of the students who have applied for ASC in Spain, tell me their responses to the Statement of Purpose', 'Of the students who have a valid passport, tell me their birthday and their Summit Advisor's name')

For both Queries and Reports, you will only see information to which you have access. Though many people might be shared on the same Query or Report, they will all see different information based on their permissions.

Reviewing Share Queries

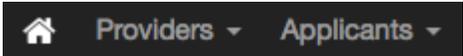
1. On your 'Administration: Home Page', you will see 'My Queries and Reports'
2. Find 'Shared Queries' with the share-symbol to its left. It's a little hard to see! Click 'Shared Queries'
3. Any queries that have been shared with you will drop down. There are multiple ways to open a query
 - a. Click the name of the Query - it will open a web-version of the information (in the same window)
 - b. Click the symbol  to the right to open the information in a text file
 - c. Click the symbol  to the right to open the information in an Excel file

Reviewing Shared Reports

1. Use the same process for Reports. Reports are located in the same box as Queries.

IV. Search for an individual student

As with Queries and Reports, you will only be able to see students for whom your permissions allow. For the most part, if you are a program leader or co-leader, you will only be able to see students who have an application in your program.

1. In the black bar across the top of the page, you will see 
2. Click Applicants. There are multiple ways to search, but for the purposes of this training, we will look only at the 'Simple Search'. Click 'Search' from the drop-down.
3. Using this screen you can search for a student using three criteria:
 - a. Name
 - b. Program name (if the student has an application in that program)
 - c. Program term (if a student has an application or applications across multiple terms)

V. Review information and documents submitted by students

Students are asked to submit information and documents in a variety of ways.

System Item Name	Use	Student-fronted Item Name
Questionnaire	Answer questions	Required Forms
Materials	Sign (electronically or hard copy) documents Turn-in materials (e.g. payments)	Material Submissions
Learning Content	Read a document and mark it as read	Required Reading
Assessment	Complete an assessment	Assessment
Documents	Upload or download a document	Document Center

To review any of these documents on an individual student:

1. Select the Query of students for which you'd like to view information OR perform a search
2. When the list opens, you will see all students who meet the criteria of that Query. You can review the criteria at the top of the page in the blue box.
3. Click the Program Name under 'Program' to open information about that student.
4. The page 'Applicant: Overview' will open. Depending on your permissions, you will see various dark purple and light purple boxes.
5. Click on an item you wish to review.
 - a. **Questionnaires** - if the student has completed the item, the date of completion will be indicated and you will be able to select the item. If not, you will only see the print button.
 - b. **Materials** - if the item has been 'received', either because the student signed it or submitted the document in person to CGL, there will be a check mark under received. CGL will add any relevant notes.
 - c. **Learning Content** - if the student has read the item, the status will indicate it.
 - d. **Assessments** - we will review this item in the future.
 - e. **Documents** - if a student has uploaded a document or the CGL has uploaded a document, you will see it here.

VI. Performing an audit

An audit will allow you to see what has or has not been completed by a group of students.

1. Select the Query of students for which you'd like to view information OR perform a search

2. Once you have a list of student names you'd like to audit, click the 'Program Audit' button above the list

3. A list of options will appear below. Different items are required for the different stages in the application process.
 - a. Advising - only used by CGL
 - b. Pre-Decision
 - i. Used by Global Study Tours leaders *prior* to students being accepted/declined.
 - c. Post-Decision
 - i. Used by Global Study Tours leaders *after* students have been accepted/declined.
 - ii. Used by Journeys leaders *after* the Placement Process has completed and students have been placed into a section in Carta.
 - d. While Abroad
 - i. Used by any user (leaders or CGL) who wish to deploy any items while the students are traveling (e.g. a questionnaire that students complete upon arrival)
 - e. Returnee
 - i. Used by any user (leaders or CGL) who wish to deploy any items after students return from traveling (e.g. an assessment used to get student feedback about your program)
4. Click the appropriate option from the drop down menu. All the items for that stage in the application will appear with check boxes to the left.
5. Select the items you'd like to audit and click 'next'.
6. A matrix will appear with check marks indicating if a student completed that item.
7. If you want to send an email to students on this list or export selected students, simply select the students using the box(es) to the left the name(s) then click 'Send Email to Marked' or 'Export Options'.
8. You can print the audit where it says 'Return to Audit Options'. There is a print button to the right.

VII. Emailing students from the system

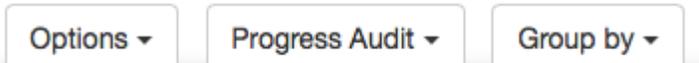
You just read that you can email students directly from the system using the Progress Audit feature. There are a couple of other ways to email students:

- Batch emailing students from a Query
- Emailing individual students from their Application Overview Page

This is useful tool, as it documents all correspondence (which can be very helpful!), however it's important to use be careful when using the batch email tool to email multiple students.

Batch emailing students from a Query

1. Open the Query with the list of students you'd like to email.

2. Just above the list, click Options 
3. Click 'Send email'

4. *It's very important to note here that all students from the Query are considered email recipients by default. Click 'Email Recipients' to see all the students and deselect any students who should not receive the email.*
5. Use the WYSIWYG editor (it's pretty bad) below to write the email. Click send when completed.

Emailing individual students

1. Open a student's Application Overview Page
2. Click 'Email'.
3. You will see three options:
 - a. **Use system email** - click here if you want to send this student an email using Carta
 - b. **Use local email client** - it will open an email from whatever program you use on your computer. Note email sent in this manner are not tracked.
 - c. **View email log** - click here to see a record of emails sent through the system.

VIII. Reviewing required questionnaires, signatory documents, and learning content

If you wish to review what students are required to complete for your program, you will do so from the student's Application Overview Page. Items are accessed differently. For some, they remain the same whether or not a student has interacted with it (learning content), while others will show a student's responses (questionnaires), if it has been completed. If you wish to see a blank copy, you'll need to do so prior to students completing it or contact CGL for a copy.

Questionnaires

1. Open any student's Application Overview Page and click 'Questionnaire'.
2. If it hasn't been completed by the student, click the printer symbol to the right.
3. You can either print the document for review or, click cancel and the system will default to an electronic version of the questionnaire.

Materials

1. Open any student's Application Overview Page and click 'Materials'.
2. Click the item you wish to view and a new window will appear.
3. The version you see will not have the option to electronically sign the document.

Learning Content

1. Open any student's Application Overview Page and click 'Learning Content'.
2. Click the symbol  to the right of the item to view.
3. Be careful! If you click marked as read, it will mark the item as read for the student! If you do this by accident, just click the black X next to the .

IX. Upload your own documents in batch

Should you want to upload travel-related information to all of your students (e.g. packing list), you can do so in batch. What you upload will populate in the students' Document Center. *Please note that once a document has been uploaded in batch, it cannot be removed in batch!* Be careful when using this tool.

1. Open the Query with the list of students you'd like to upload a document.
2. Click Options 
3. Click 'Batch attach file'
4. *It's very important to note here that all students from the Query will receive the document by default. Click 'Batch Attach File' to see all the students and deselect any students who should not receive the Document.*
5. Give the document a title and upload the document next to 'New File'.
6. Select if you want the students to be able to see the document or if you want them to receive an email letting them know something has been uploaded.

X. Accepting, Declining, and Waitlisting students (Global Study Tours only)

To communicate to the Center for Global Learning (CGL) your preference for each applicant, you will be using what is called an 'Application Tag'. Essentially, you will be applying labels to each student, which will filter them into one of three Queries: (1) Faculty Approved, (2) Faculty Declined, (3) Faculty Waitlisted. You will find these Queries pre-populated on your Administrative Homescreen - as you apply tags, these Queries will populate.

Students cannot see Application Tags, so this provides a way to shift and organize students prior to CGL official changing their application status from Pending to Accepted/Declined/Waitlisted.

To apply an Application Tag to an individual student

1. Open the Applicant Overview Page of the student you wish to review.
2. You will see 'Add tag to application'. Click this drop-down menu and select from the list either 'Accept Student', 'Decline Student' or 'Waitlist Student'.

To apply an Application Tag to a group of students

7. Open the Query with the list of students you'd like to select from.
8. Click Options 
9. Click 'Batch app tags'
10. *It's very important to note here that all students from the Query will receive the tag by default. Click 'Batch Application Tag Edit' to see all the students and deselect any students who should not receive the Application Tag.*
11. Once you have selected the students to whom you wish to apply the Application Tag, select the Application Tag from the drop-down menu 'Add Application Tag' and hit update.