

Slate — Navigation

You will need:



Internet connection



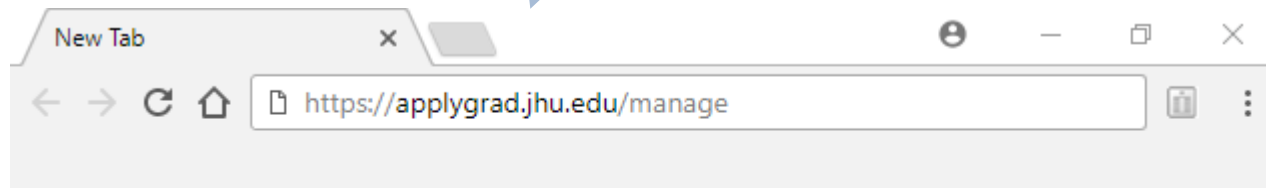
Your JHED ID and password



Web browser: Firefox, Safari or Chrome

1

<https://applygrad.jhu.edu/manage>



Enter your
JHED credentials

A screenshot of the Johns Hopkins University & Medicine login page. The page has a blue header and a light gray background. The text "JOHNS HOPKINS UNIVERSITY & MEDICINE" is prominently displayed. Below it, the instruction "Enter your Login ID and Password" is shown. There are two input fields: "Login ID" and "Password". A "Login" button is located below the password field. At the bottom right, there are links for "First time JHED User?", "Forgot Password", "Login Problems?", and "Frequently". The footer includes "Johns Hopkins Enterprise Authentication" and "Use of the Johns Hopkins Enterprise" with a copyright notice "© 2018 Johns Hopkins Institution". A blue arrow points from the text "Enter your JHED credentials" to the login form.








2

Familiarize yourself with the navigation icons.



Welcome, Aarti.

You have accessed Slate from 1 device in the past 72 hours. [Details](#) [Supervised Login](#)

 @Technolutions Good morning! We've been having a fun time at @NEACAC @NYSACAC @SuperConf18! If you're here, come say hi to Jennifer and Chris - shoutout to our friend David Pierre from @StJohnsU ! 😊 Posted 3 hours ago	 @katiebxxth It's Slate Launch Day! Our nontraditional recruitment team is going live with new inquiries and new applications TODAY. 🙌 @Technolutions #SlateLaunchDay #CRM #highered Posted on Jun 4, 2018	 @605stat Hey @Technolutions, you can add another client national championship to your tally - @AugieBaseball won the @NCAADII College World Series yesterday for its first baseball national title - in its first ever trip to Posted on Jun 3, 2018	 @KrysHope I'm longing for the days when I worked with an institution that used @Technolutions. Have you started recruiting in Hawaii? *whispers* You have an in! Posted on Jun 1, 2018	 @katiebxxth I need someone to nerd out with about liquid markup in Slate. 🙌 @technolutions #CRM #highered Posted on May 31, 2018	 @sara_mcconkey Loving all the great presentations today at the Slate #PAuser meeting! Thanks @jbrules_tls for presenting on Voyager! @Technolutions  Posted on May 31, 2018
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INNOVATION SUMMIT

CHICAGO · 2018

The countdown has begun: 20d 21h 5m 10s [Register at SlateSummit.org](https://SlateSummit.org) to join your Slate colleagues.

Continued on next page...



Records—Search Database

Search for records in the database.



Queries/Reports

Run saved or new queries/reports. Reports are more like saved queries that you would use for your day to day functionality. Detailed reports will be created.



Reader - Slate Reader

Manage reader bins, review applications, make decision releases.



Deliver [communications]
Mailings/Calendar/Campaign

Create and manage email outreach campaigns to prospective students, applicants, and other groups within Slate.



Inbox /Snippets

Allows messages to be associated with the person record in Slate, which provides your users with greater context; facilitates material assignment from email attachments; and maintains a message history on the person record.



Forms

Used for a number of tasks from collecting data from prospective students to administratively updating specific data points for student records. Furthermore, a form is quite often a integral piece for many of the other Slate modules.



Events - Events/Trips/[Slate.org](https://slate.org)

Configure your events in a central location.



Scheduler

Manage your interviews.

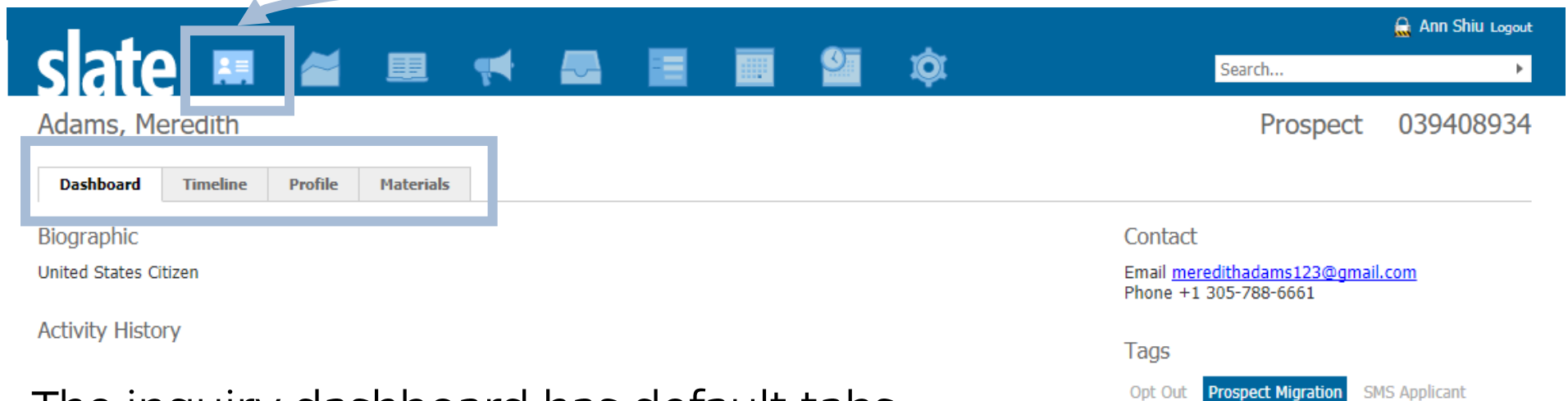


Database

Super user/database admin access; there is limited access to this.

3

Familiarize yourself with dashboard navigation.



The screenshot shows the top navigation bar of the Slate system. The bar is dark blue with the 'slate' logo on the left. To the right of the logo is a row of icons: a person with a list, a folder, a document, a megaphone, a folder, a document, a calendar, a clock, and a gear. Further right is a search bar with the text 'Search...' and a play button. On the far right of the bar, the user's name 'Ann Shiu' and a 'Logout' link are visible. Below the navigation bar, the user's name 'Adams, Meredith' is displayed on the left, and 'Prospect 039408934' is on the right. Below the user's name is a row of four tabs: 'Dashboard', 'Timeline', 'Profile', and 'Materials'. The 'Dashboard' tab is highlighted with a blue border. Below the tabs, the 'Biographic' section is visible, showing 'United States Citizen' and 'Activity History'. On the right side, the 'Contact' section shows 'Email meredithadams123@gmail.com' and 'Phone +1 305-788-6661'. Below the contact information is the 'Tags' section, which includes 'Opt Out', 'Prospect Migration' (highlighted with a blue background), and 'SMS Applicant'.

The inquiry dashboard has default tabs:

- A** Dashboard
- B** Timeline
- C** Profile
- D** Materials

Continue for more details on these tabs...

A Dashboard – displays all activity and status history of that record.

Set Default Tab
Allows you to indicate what tab you want to land on every time you enter Slate.

Email
Whenever you see the contact email throughout Slate, you can send an email by clicking the email address.

Status History
Snapshot of history from prospect to applicant.

Tags
Displays the following:

- Opt out – will be highlighted if a prospect or applicant opts out of receiving communications. You can also administratively set the opt out.
- SMS Applicant – this tag will be set once a prospect becomes an applicant until we start using Slate as your online application.
- Test Record – allows you to mark a record as a test record.

- B** Timeline – displays all high level interactions [i.e. form submissions, sent emails, items clicked in the email, etc.] from a user perspective.

Preston, Patricia (PPRESTO5) Inquiry (

Dashboard **Timeline** Profile Materials

2018 Jun 2018 Jun 2018 May 2018 May 2018 May 2018 May 2018 Apr 2018 Apr

2018 June

- 06/08 1:14:38 PM [Sent Message](#) School administrator
- 06/07 10:05:13 AM [Sent Message](#) Johns Hopkins School of Education TFA/TNTP FAQs
- 06/06 10:04:07 AM [Sent Message](#) Thank you for your interest!
- 06/06 10:04:07 AM [Sent Message](#) Johns Hopkins School of Education Doctor of Philosophy (PhD)
- 06/05 2:25:03 PM [Email Link Clicked \(+1\)](#) Thank you for your interest! [www.linkedin.com/school/johns-hopkins-university-school-of-educ...](#)

Internet Explorer MD, United States

Timeline Interactions Audit Log

New Interaction

Timeline

- Clicking interactions will display details of that transaction.
- Emails can be resent from the timeline and forms can be edited when they are clicked.
- The submenu on the right provides links to the records interactions and audit log.

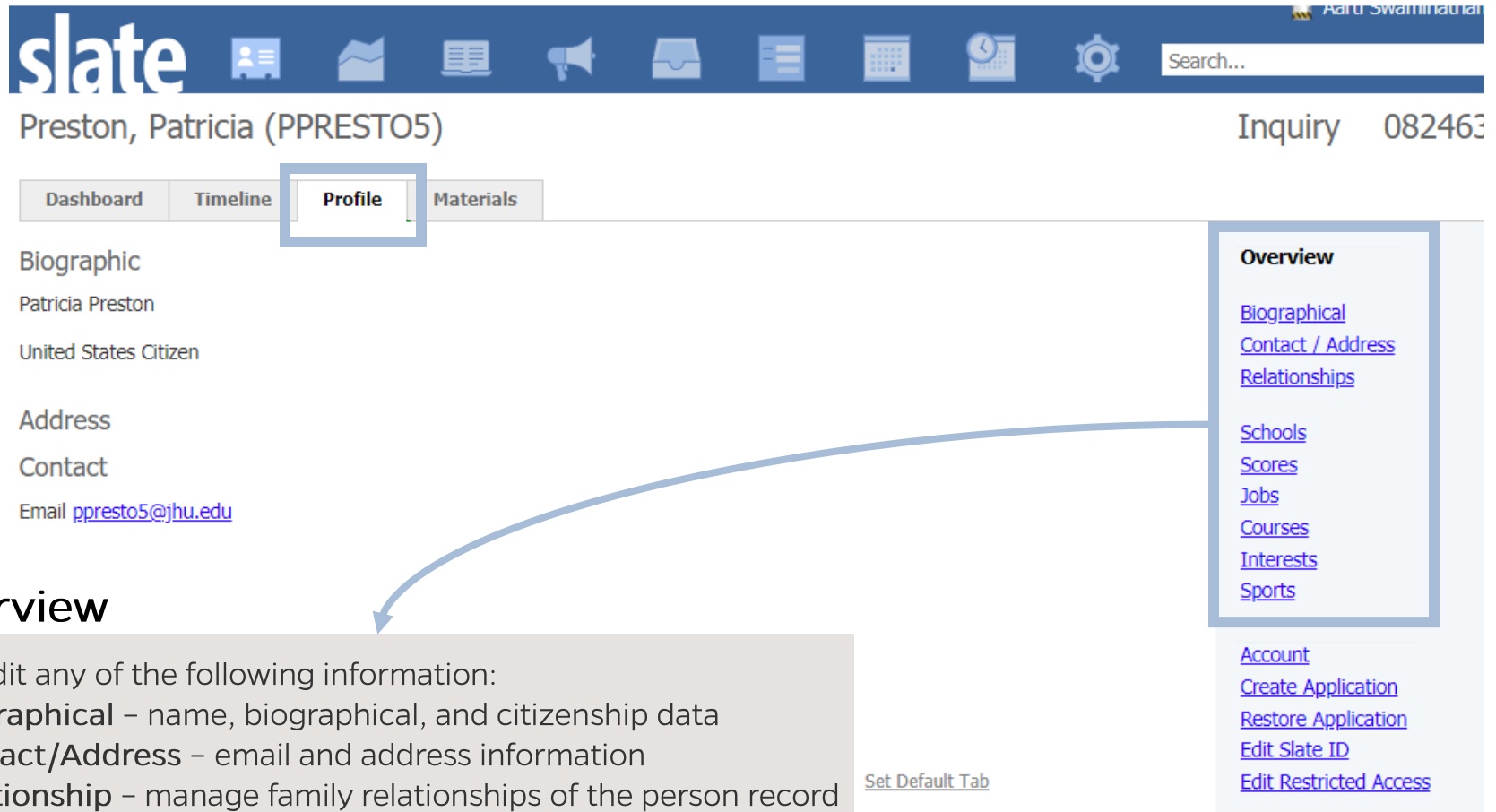
Interactions










Displays the type of interaction i.e. actual email sent, form submitted,

Audit Log

Displays every transaction from the record's creation to anyone who has view or updated the record.

 Profile – displays the person’s biographical information.



slate          Search...

Preston, Patricia (PPRESTO5) Inquiry 082463

Dashboard Timeline **Profile** Materials

Biographic
Patricia Preston
United States Citizen

Address
Contact
Email ppresto5@jhu.edu

Overview
[Biographical](#)
[Contact / Address](#)
[Relationships](#)
[Schools](#)
[Scores](#)
[Jobs](#)
[Courses](#)
[Interests](#)
[Sports](#)
[Account](#)
[Create Application](#)
[Restore Application](#)
[Edit Slate ID](#)
[Edit Restricted Access](#)

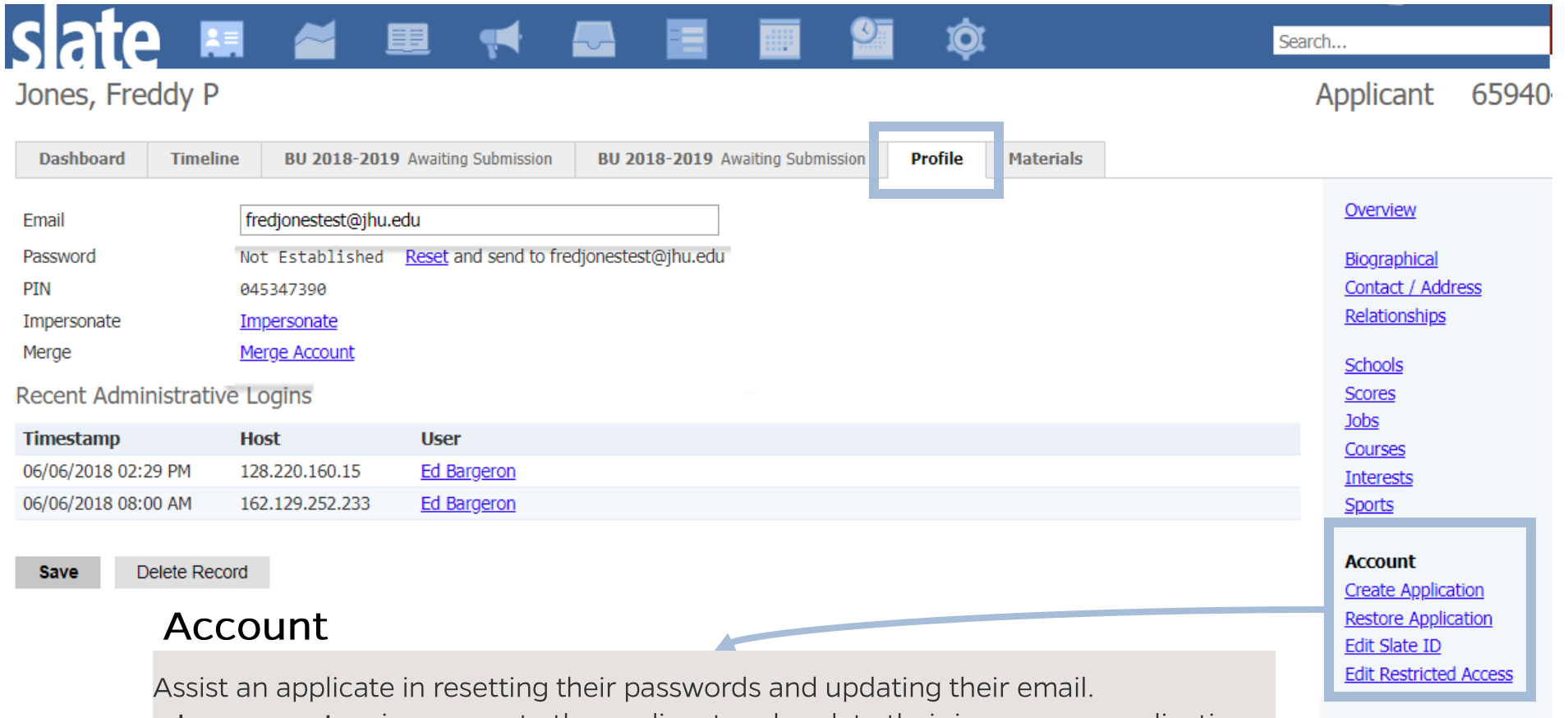
Overview

Add/edit any of the following information:

- **Biographical** – name, biographical, and citizenship data
- **Contact/Address** – email and address information
- **Relationship** – manage family relationships of the person record
- **Schools** – college and/or university information
- **Scores** – test scores
- **Jobs** – work history
- **Courses** – previous coursework as it relates to the application process
- **Interest** – interest types
- **Sports** – related sport affiliation

[Set Default Tab](#)

Profile (continued)



slate

Jones, Freddy P

Applicant 65940

Dashboard Timeline BU 2018-2019 Awaiting Submission BU 2018-2019 Awaiting Submission **Profile** Materials

Email

Password Not Established [Reset](#) and send to fredjonestest@jhu.edu

PIN 045347390

Impersonate [Impersonate](#)

Merge [Merge Account](#)

Recent Administrative Logins

Timestamp	Host	User
06/06/2018 02:29 PM	128.220.160.15	Ed Barger
06/06/2018 08:00 AM	162.129.252.233	Ed Barger

Save Delete Record

Account

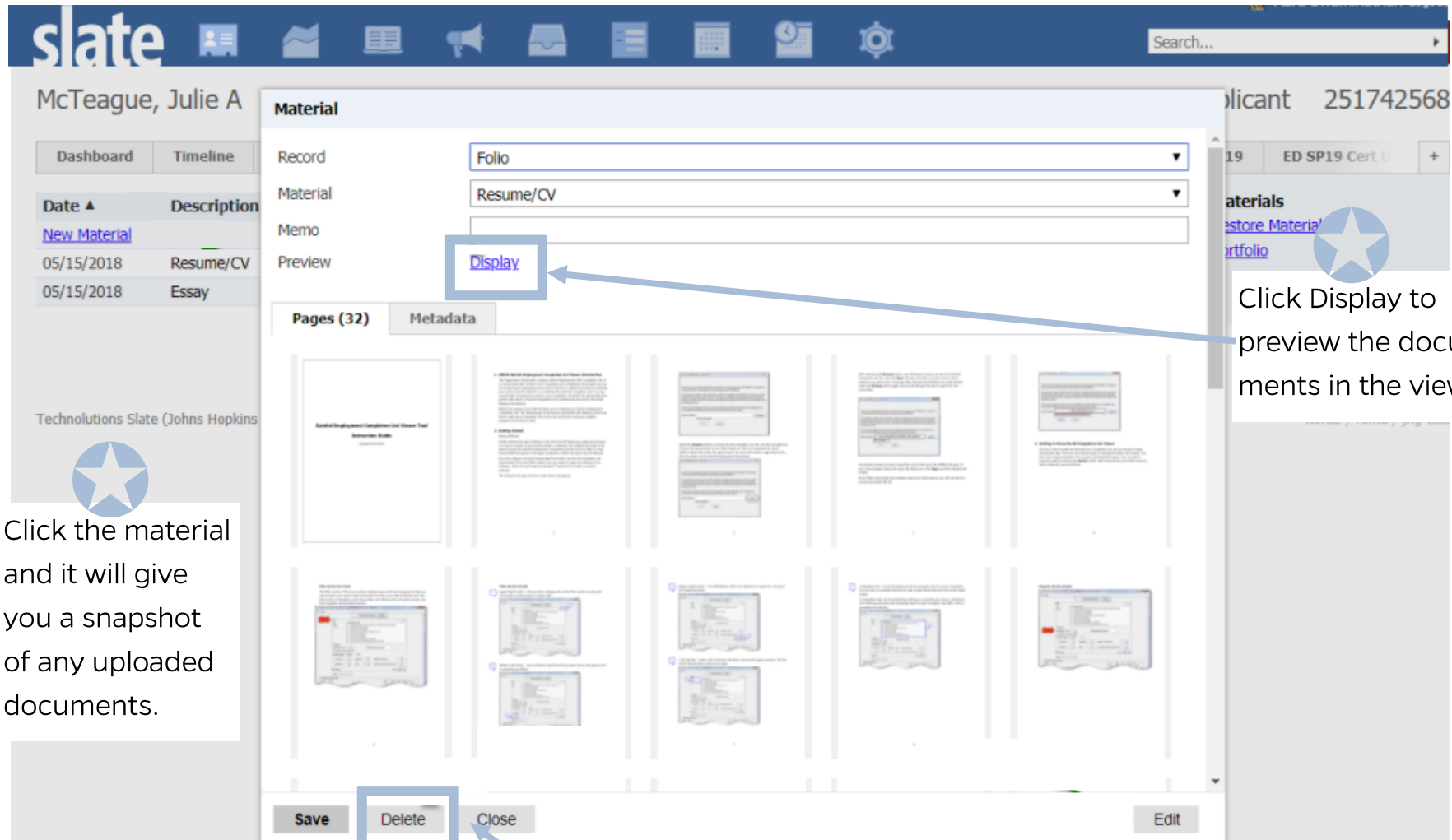
- [Create Application](#)
- [Restore Application](#)
- [Edit Slate ID](#)
- [Edit Restricted Access](#)

Account

Assist an appicatee in resetting their passwords and updating their email.

- **Impersonate** – impersonate the applicant and update their in progress application. All administrative login will be tracked.
- **Merge Account** – if you know this is a duplicate record you can merge the records together here.
- **Delete Record** – the entire record for this person will be deleted
- **Create Application** – you can administratively create an application on behalf of an applicant
- **Restore Application** – allows you to restore any previously delete applications
- **Edit Slate ID and Edit Restricted Access** – DO NOT USE

 Materials – list of all materials associated with the application checklist.



Click the material and it will give you a snapshot of any uploaded documents.

Click Display to preview the documents in the viewer .

Delete
Delete the material and its uploaded documents.

4

Explore Slate Scholar—an internal warehouse of resources to assist you on the specific screen you're viewing.

The screenshot shows the Slate Scholar interface. At the top, a blue navigation bar contains the 'slate' logo and several icons. Below this, the user's name 'Adams, Meredith' is displayed. A secondary navigation bar includes tabs for 'Dashboard', 'Timeline', 'Profile', and 'Materials'. On the left, a 'Slate Scholar' sidebar lists various resources. The main content area on the right displays the 'Slate Scholar Classroom' section, which includes a 'Select Course' dropdown, 'Custom Tabs', and 'The Person Record'. Below these are links to 'Interactions', 'Tags', 'USPS address validation and standardization', 'Origin Sources', 'Slate Standard Fields & Prompts List', and 'Customizing the Student Dashboard and Application Tab'. The 'The Person Record' section is expanded, showing a 'Table of Contents' with links to 'Overview', 'How to Create a Test Record', and 'The Profile Tab and Standard Slate Fields'. Below this is an 'Overview' section describing the purpose of the Person Record, followed by a 'How to Create a Test Record' section with a numbered list of steps.

Slate Scholar

Slate Scholar Classroom

Select Course

Custom Tabs

The Person Record

Interactions

Tags

USPS address validation and standardization

Origin Sources

Slate Standard Fields & Prompts List

Customizing the Student Dashboard and Application Tab

Training Lesson: Custom Tabs

Slate Scholar

Slate Scholar Classroom

Select Course

Custom Tabs

The Person Record

Slate Scholar > Documentation > [115001267971](#)

Table of Contents

- [Overview](#)
- [How to Create a Test Record](#)
- [The Profile Tab and Standard Slate Fields](#)

Overview

The Person Record is where an individual's data will be stored and displayed. This includes their status, biographical and contact information, a timeline of interactions, application materials, academic, scores, interests, and much more.

[Back to Top](#)

How to Create a Test Record

- Click **Records** in the top navigation bar.
- Click the **New Person**.
- Enter the following User configurations in the next window:
 - Email** - Give the test record an email address that is accessible.
 - First Name** - It is a good practice to append the word TEST to the first and last name so this record is easily identified as a test record.
 - LastName** - It is a good practice to append the word