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
Familiarize yourself with the navigation icons.
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records—Search Database</td>
<td>Search for records in the database.</td>
</tr>
<tr>
<td>Queries/Reports</td>
<td>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.</td>
</tr>
<tr>
<td>Reader - Slate Reader</td>
<td>Manage reader bins, review applications, make decision releases.</td>
</tr>
<tr>
<td>Deliver [communications]</td>
<td>Create and manage email outreach campaigns to prospective students, applicants, and other groups within Slate.</td>
</tr>
<tr>
<td>Mailings/Calendar/Campaign</td>
<td></td>
</tr>
<tr>
<td>Inbox /Snippets</td>
<td>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.</td>
</tr>
<tr>
<td>Forms</td>
<td>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.</td>
</tr>
<tr>
<td>Events - Events/Trips/<a href="Slate.org">Slate.org</a></td>
<td>Configure your events in a central location.</td>
</tr>
<tr>
<td>Scheduler</td>
<td>Manage your interviews.</td>
</tr>
<tr>
<td>Database</td>
<td>Super user/database admin access; there is limited access to this.</td>
</tr>
</tbody>
</table>
3. Familiarize yourself with dashboard navigation.

The inquiry dashboard has default tabs:
- **Dashboard**
- **Timeline**
- **Profile**
- **Materials**

Continue for more details on these tabs...
Dashboard – displays all activity and status history of that record.

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.

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

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

- 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.

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
Profile (continued)

Account

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