

Slate — Add Custom Interactions to Records

You will need:



Internet connection



Your JHED ID and password



Web browser: Firefox, Safari or Chrome

Add Custom Interactions to Records

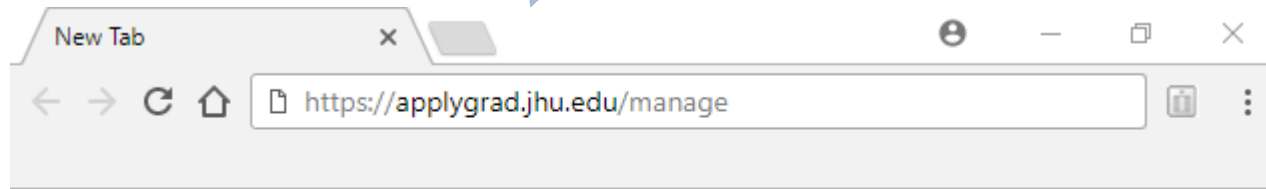
The following custom interactions have been added to the database for your use:

- ★ Contact > Phone Call
- ★ Contact > Email
- ★ Contact > Meeting

This guide will demonstrate how to add a custom interaction to a record.

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 with the text "JOHNS HOPKINS UNIVERSITY & MEDICINE". Below the header, there is a section titled "Enter your Login ID and Password". This section contains two input fields: "Login ID" and "Password". Below these fields is a "Login" button. At the bottom right of the login section, there are links for "First time JHED User?", "Forgot Password", "Login Problems?", and "Frequently Asked Questions". At the very bottom of the page, there is a copyright notice: "© 2018 Johns Hopkins Institution".


2

Click Records.


Welcome, Ann.

[Details](#) [Supervised Login](#)

 @Technolutions
 We're so excited for #SharkWeek that we just keep swimming Round, and Round, and Round.

 @abbythebluehen
 I just got back from a week-long vacation and all these new #Slate features are live... How am I supposed to

 @ZibblesWibbles
 I love using #Slate for all my admissions worker needs! Fun and accessible :-) thx @Technolutions

 @zach_kuba
 Me before and after using #Slate on this early Monday morning @Technolutions

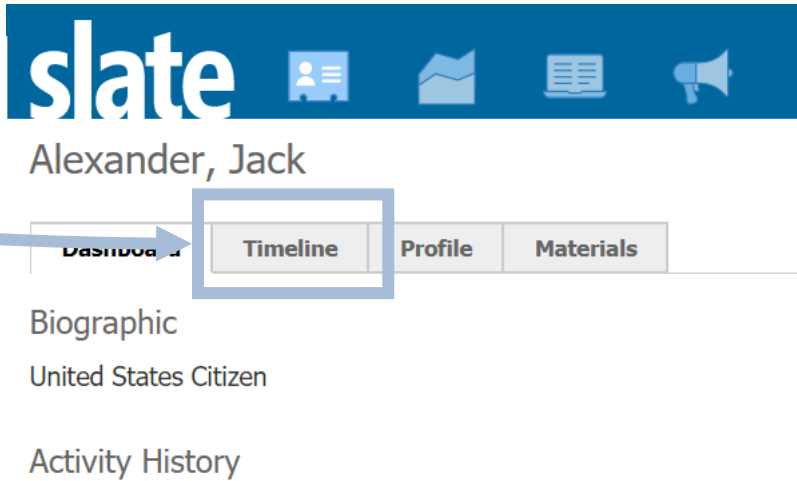


3

Lookup record.

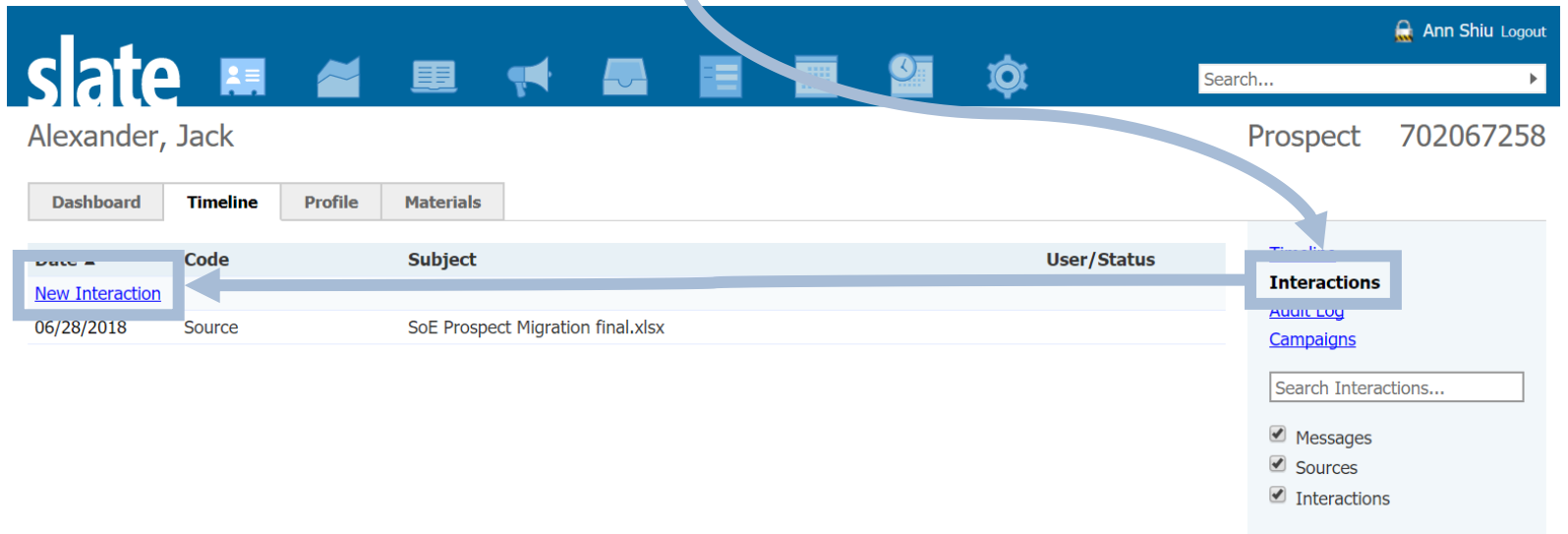
4

Click Timeline.



5

Click Interactions followed by New Interaction.



6

Complete the interaction form; click **Save** when complete.

User - this will default to the user name.

Code- select the parent code of the interaction.

Date - this will default to the current time, but can be overridden.

Subject - the subject will be visible on the student record.

If the interaction code is sufficient, leave this blank.

Private Comments - private comments are only visible administratively.

Public - Leave this setting unchecked. If checked, comment here will be made public.

Note—Use the **Search Interactions** box or toggle on the interaction types by using checkboxes to easily find specific interactions on the student record. A list of interactions based on Parent Codes may also be displayed.

Interaction

User: Shiu, Ann

Code: [Empty]

Date: 08/03/2018 Time: 12:41:41 PM

Subject: [Empty]

Private Comments: [Empty]

Public: Post to online status (includes subject and public comments)

Save **Cancel**

User/Status

[Timeline](#)

Interactions

[Audit Log](#)

[Campaigns](#)

Search Interactions...

Messages

Sources

Interactions