Slate — Administrative Dashboard

- You will need:
- Internet connection
- Your JHED ID and password
- Web browser: Firefox, Safari or Chrome

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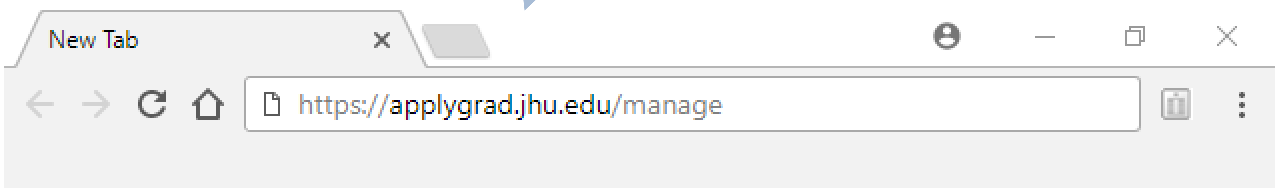
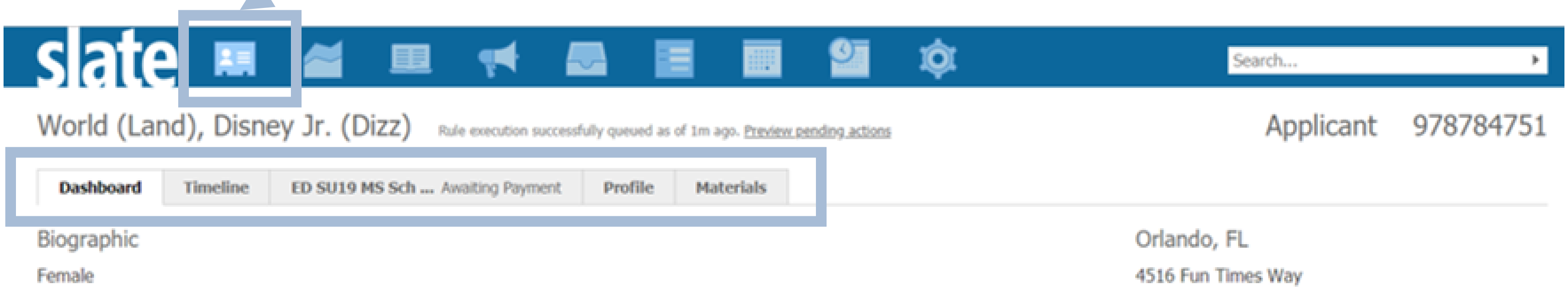
https://applygrad.jhu.edu/manage



Enter your

JHED credentials

2 Familiarize yourself with dashboard navigation.

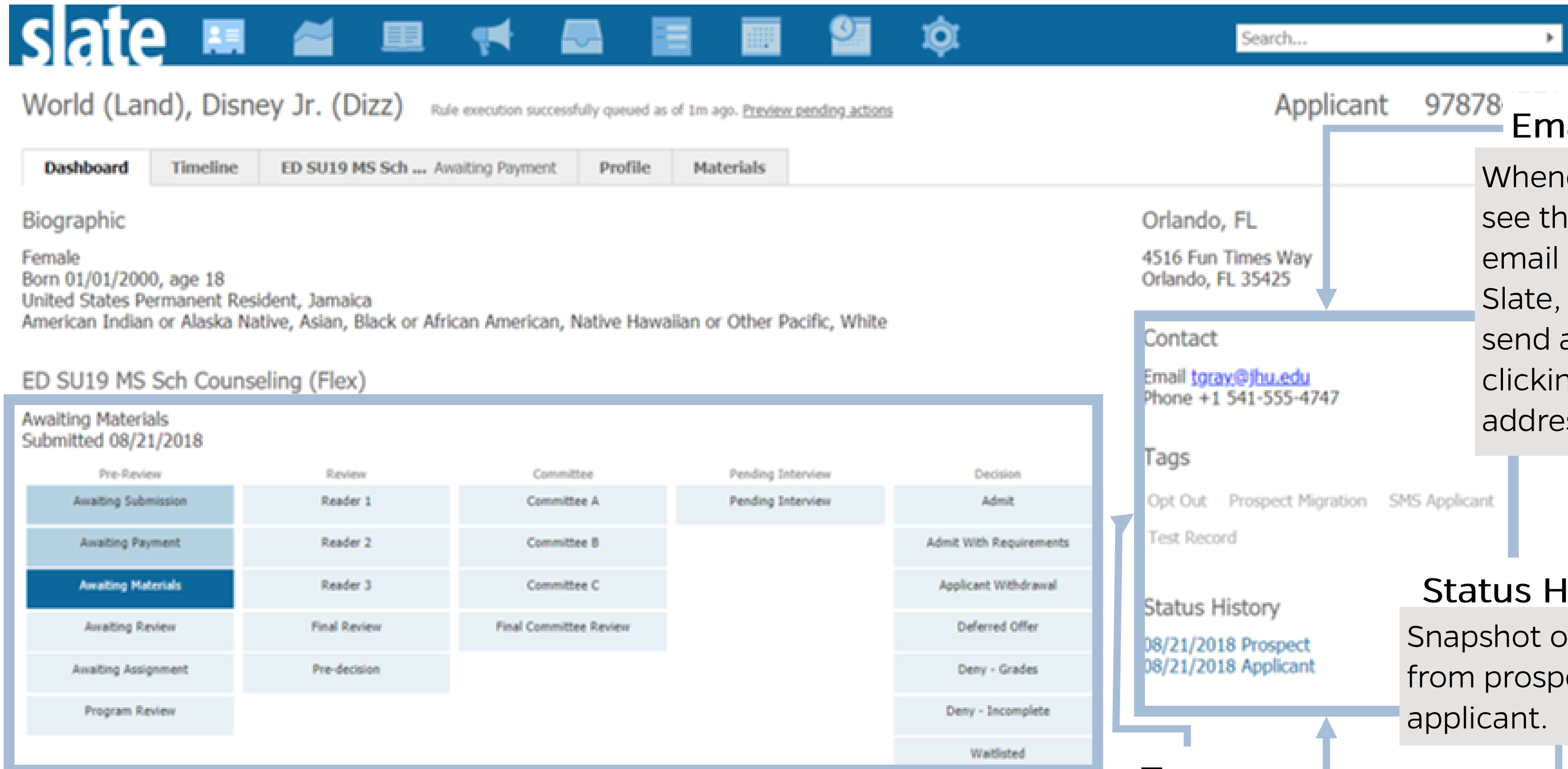


The inquiry dashboard has default tabs:

- A Dashboard
- B Timeline
- C Program Details Tab
- D Profile
- E Materials

Continue for more details on these tabs.

A 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.

Workflow

The blue boxes are snapshots of the bin/workflow structure.

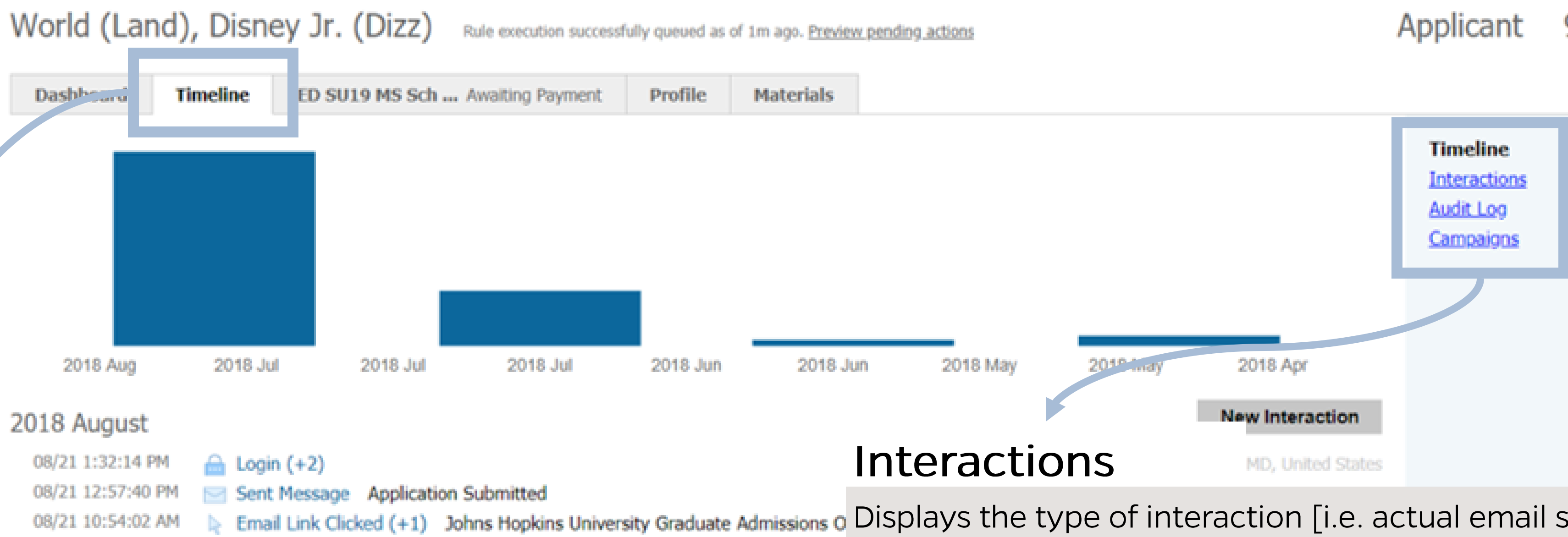
- **Light blue** – the applicant has not been assigned to any of those bins.
- **Medium blue** – the applicant was in that status and assigned to that bin but has been moved to the next status.
- **Dark blue** – the applicant is currently assigned to that bin.

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.
- **Prospect Migration** – will be highlighted if the original creation of this record was via migrated prospect data.
- **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.



Interactions

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

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, audit log and campaigns.

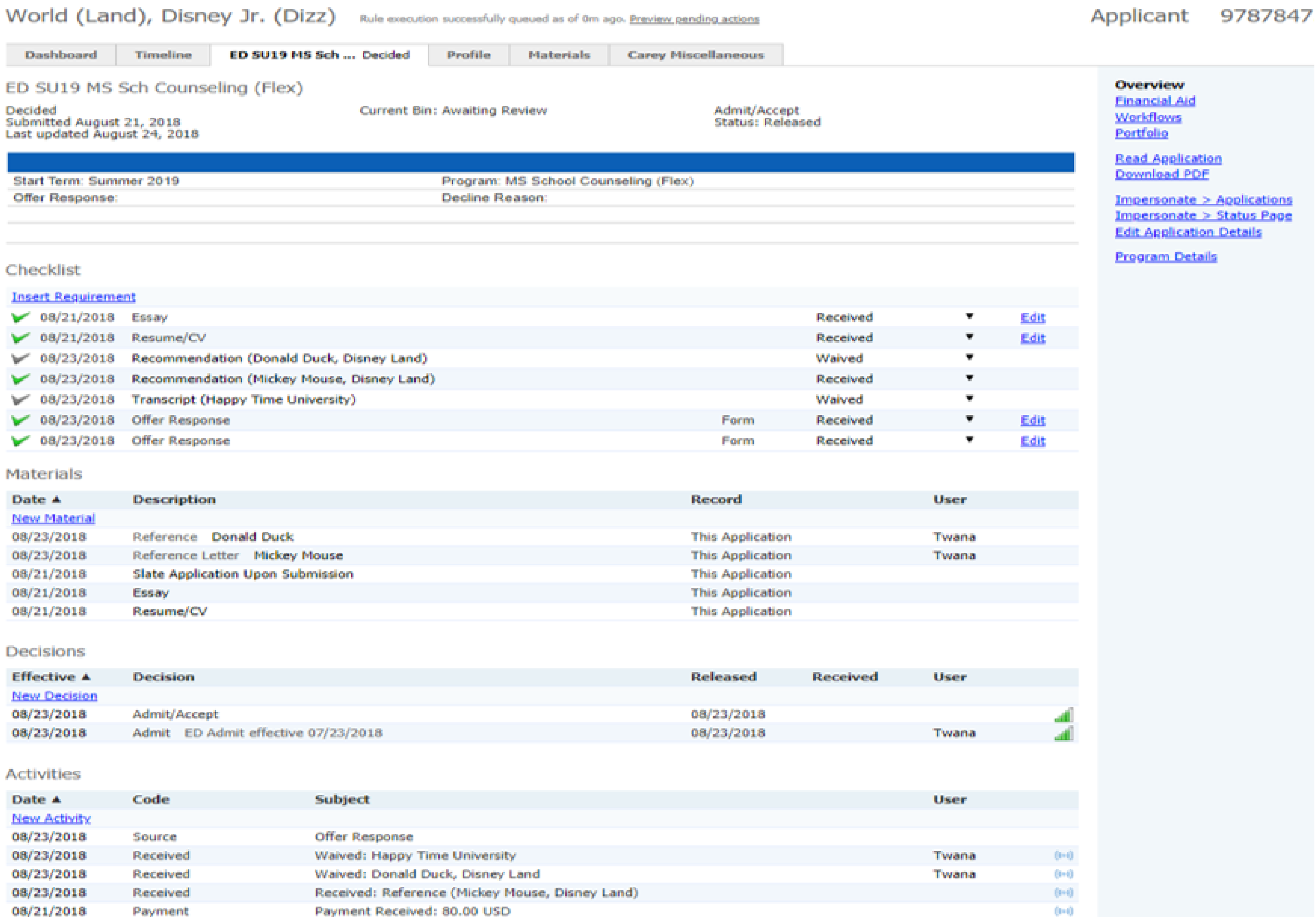
Audit Log

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

Campaigns

Displays all emails that were sent to the applicant when they were a prospect or attended an event that has campaign emails associated with it.

C Program Details Tab – application tab of the applicant's record providing an overview of their checklist items, materials, decisions, and activities.



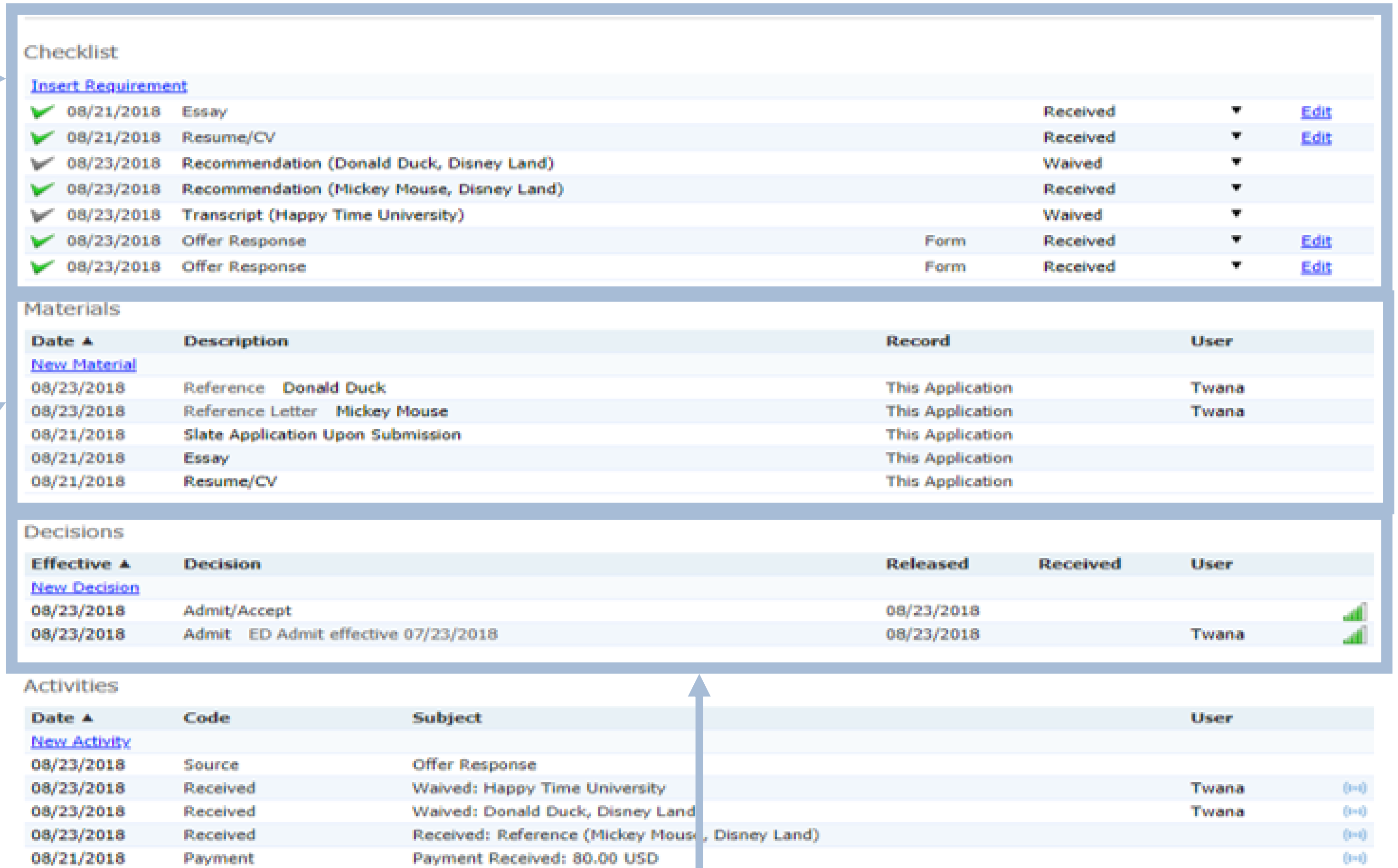
Continue to the next page for more about the Program Details Tab.

C Program Details Tab (continued)

Checklist

List of requirements of the program applied to.

- Checklist items can be administratively updated by clicking on the arrow to the right of the status.
- To add a new requirement click "insert requirement."



Checklist

Insert Requirement

08/21/2018	Essay		Received	▾	Edit
08/21/2018	Resume/CV		Received	▾	Edit
08/23/2018	Recommendation (Donald Duck, Disney Land)		Waived	▾	
08/23/2018	Recommendation (Mickey Mouse, Disney Land)		Received	▾	
08/23/2018	Transcript (Happy Time University)		Waived	▾	
08/23/2018	Offer Response	Form	Received	▾	Edit
08/23/2018	Offer Response	Form	Received	▾	Edit

Materials

Date ▲	Description	Record	User
New Material			
08/23/2018	Reference Donald Duck	This Application	Twana
08/23/2018	Reference Letter Mickey Mouse	This Application	Twana
08/21/2018	Slate Application Upon Submission	This Application	
08/21/2018	Essay	This Application	
08/21/2018	Resume/CV	This Application	

Decisions

Effective ▲	Decision	Released	Received	User
New Decision				
08/23/2018	Admit/Accept	08/23/2018		
08/23/2018	Admit ED Admit effective 07/23/2018	08/23/2018		Twana

Activities

Date ▲	Code	Subject	User
New Activity			
08/23/2018	Source	Offer Response	
08/23/2018	Received	Waived: Happy Time University	Twana
08/23/2018	Received	Waived: Donald Duck, Disney Land	Twana
08/23/2018	Received	Received: Reference (Mickey Mouse, Disney Land)	
08/21/2018	Payment	Payment Received: 80.00 USD	

Materials

Required materials that have been submitted by the applicant.

- To view what has been submitted, click the material description and then display.

Decisions

Final decision made on the applicant.

Continue to the next page for more about the Program Details Tab.

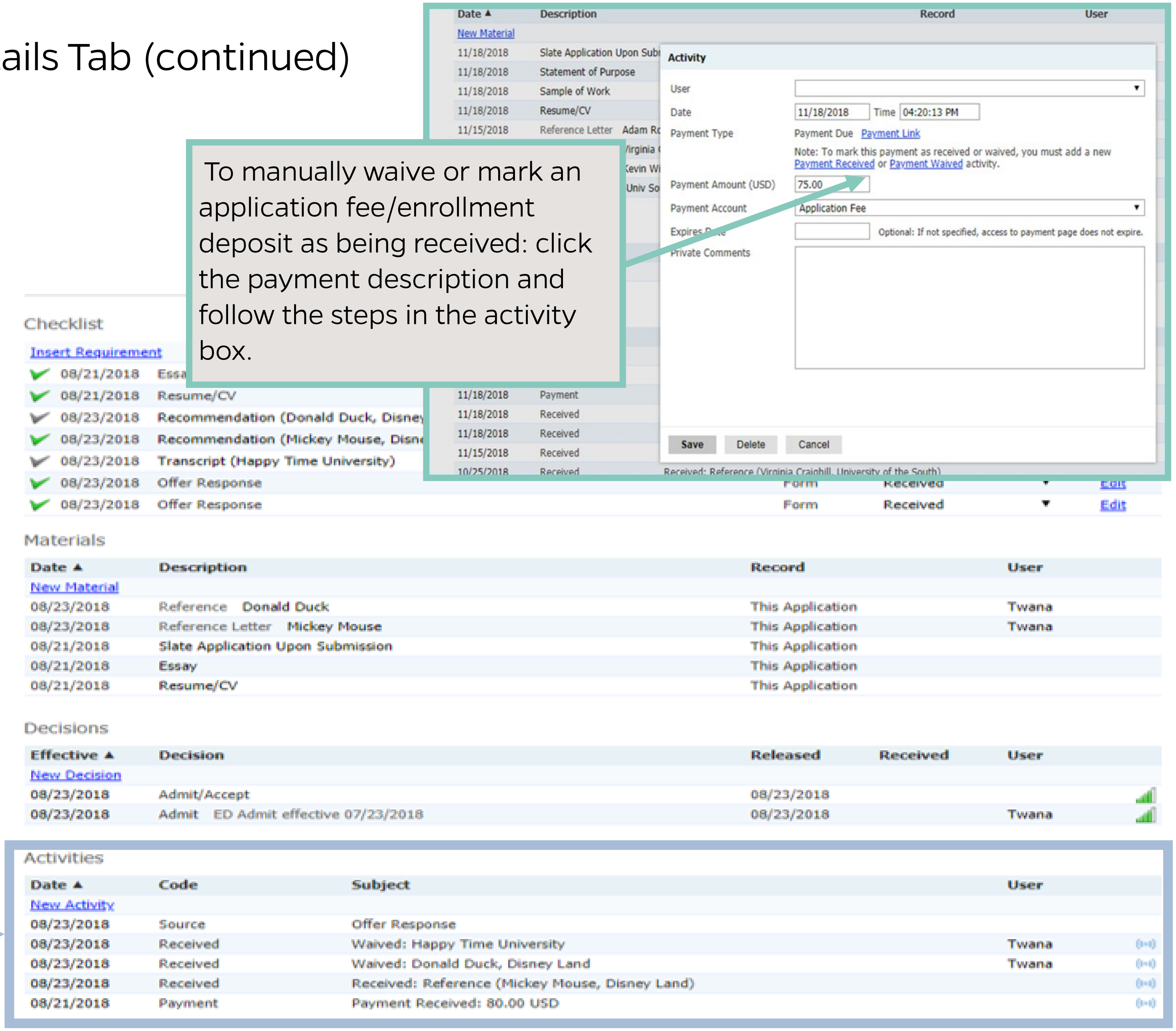
C Program Details Tab (continued)

Activities

Record of any activity related to the application requirements, fees, and decisions.

- To view details about any item, click the name and you will either be able to see additional information or a copy of the uploaded document.

To manually waive or mark an application fee/enrollment deposit as being received: click the payment description and follow the steps in the activity box.



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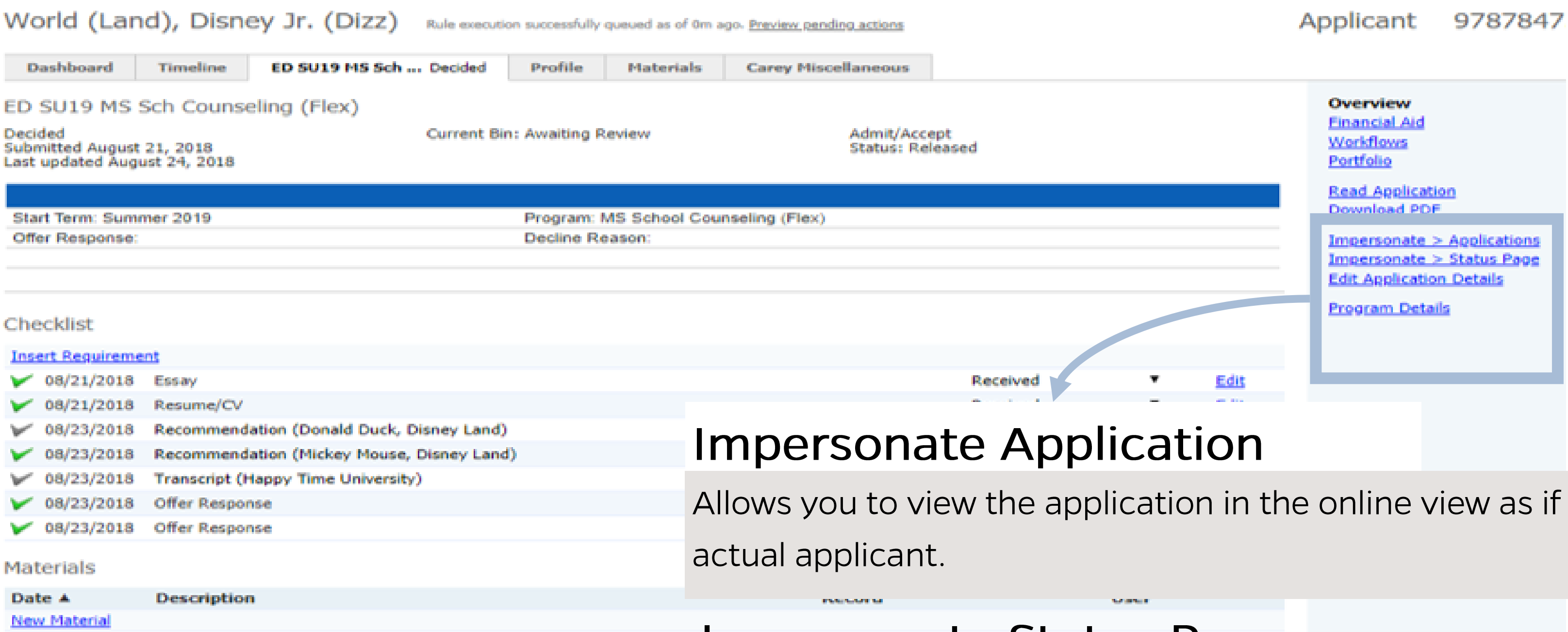
c Program Details Tab (continued)



Impersonate Application

Allows you to view the application in the online view as if you were the actual applicant.

Impersonate Status Page

Takes you to the applicant's status portal.

Edit Application Details

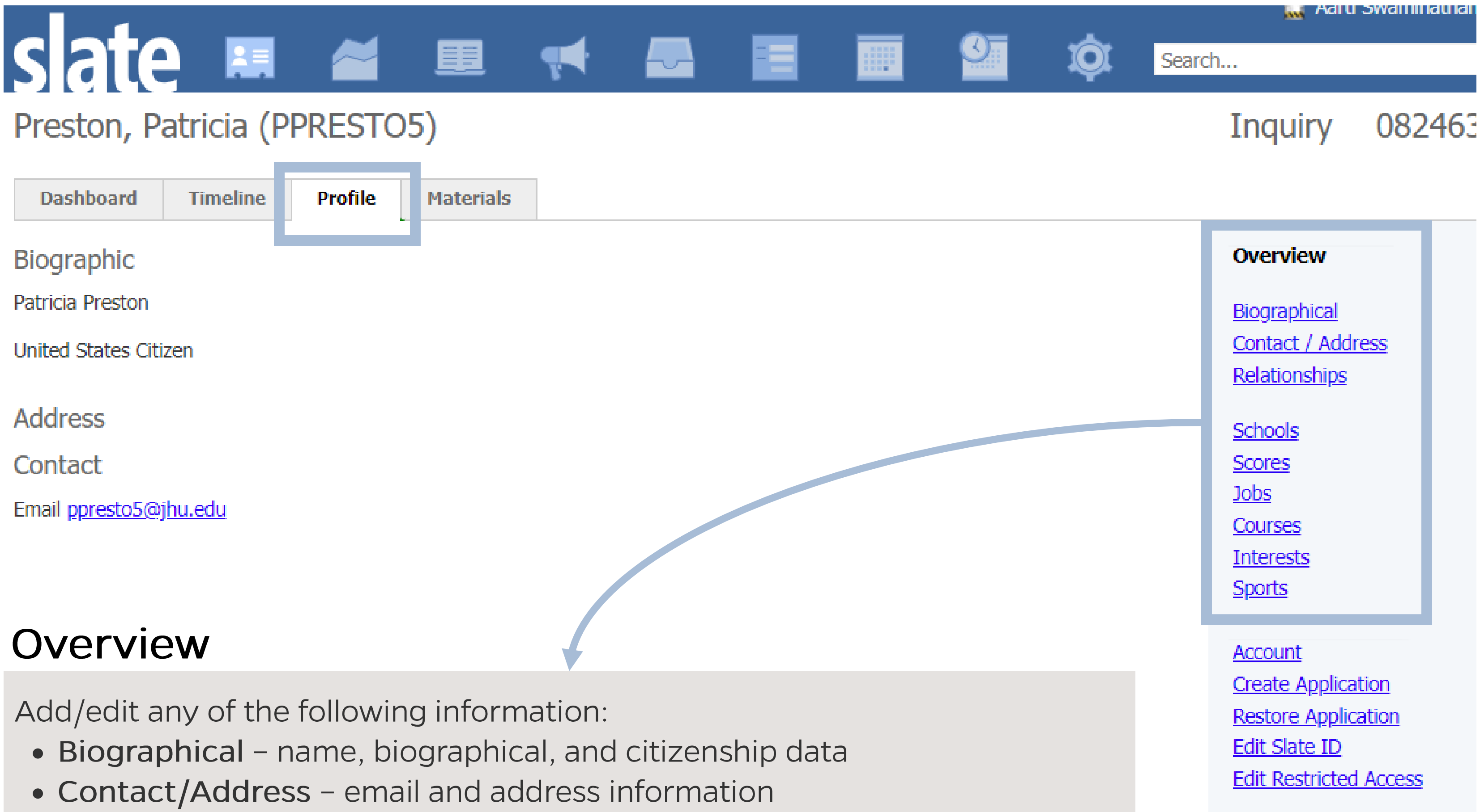
Allows you to change the round of the current application and see submission date and payment date. You can also delete the application or clone it if necessary.

Program Details, Ops Admin, etc

[Label name varies by school]

All additional information needed for application processing will be found here [i.e. stipend, scholarship amounts, tuition].

D Profile – displays the person's biographical information.

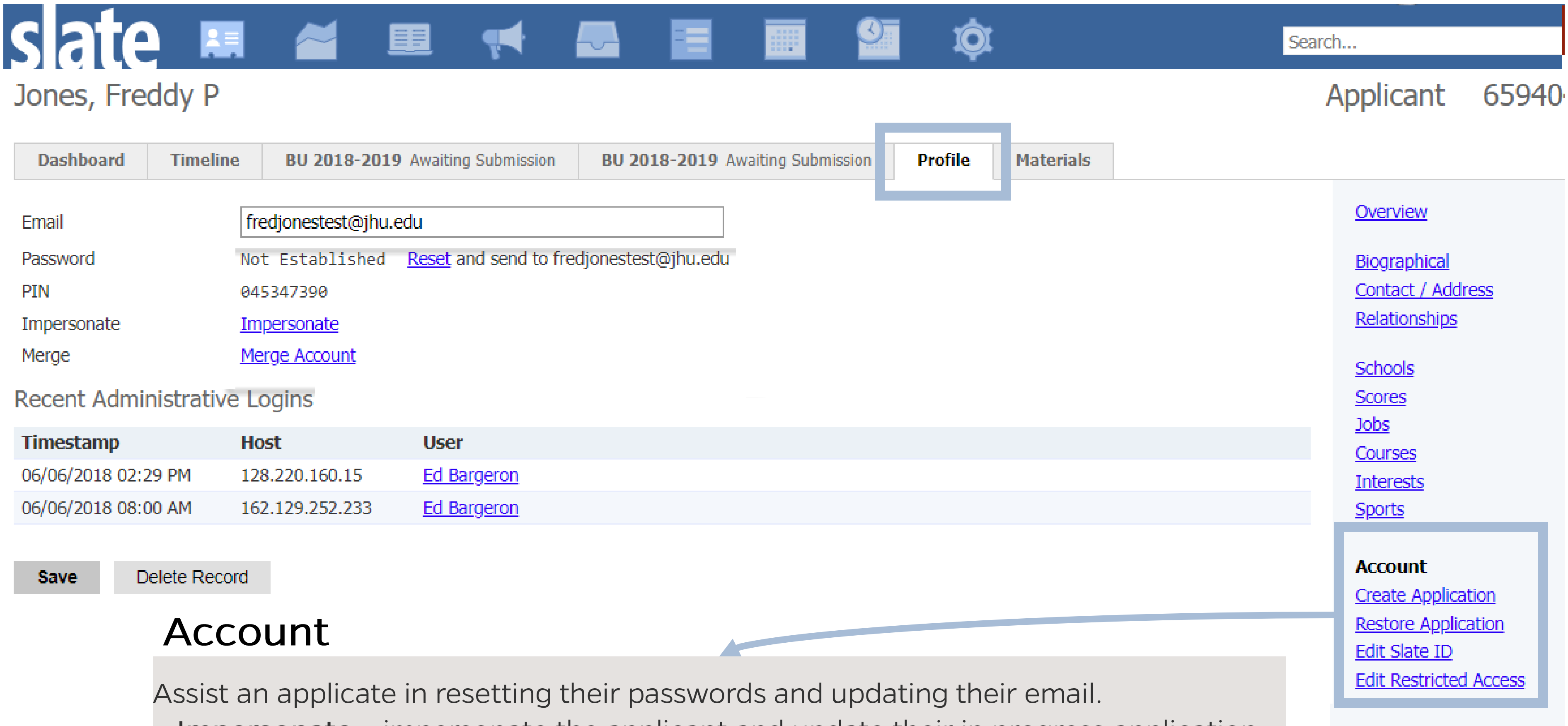


Overview

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)

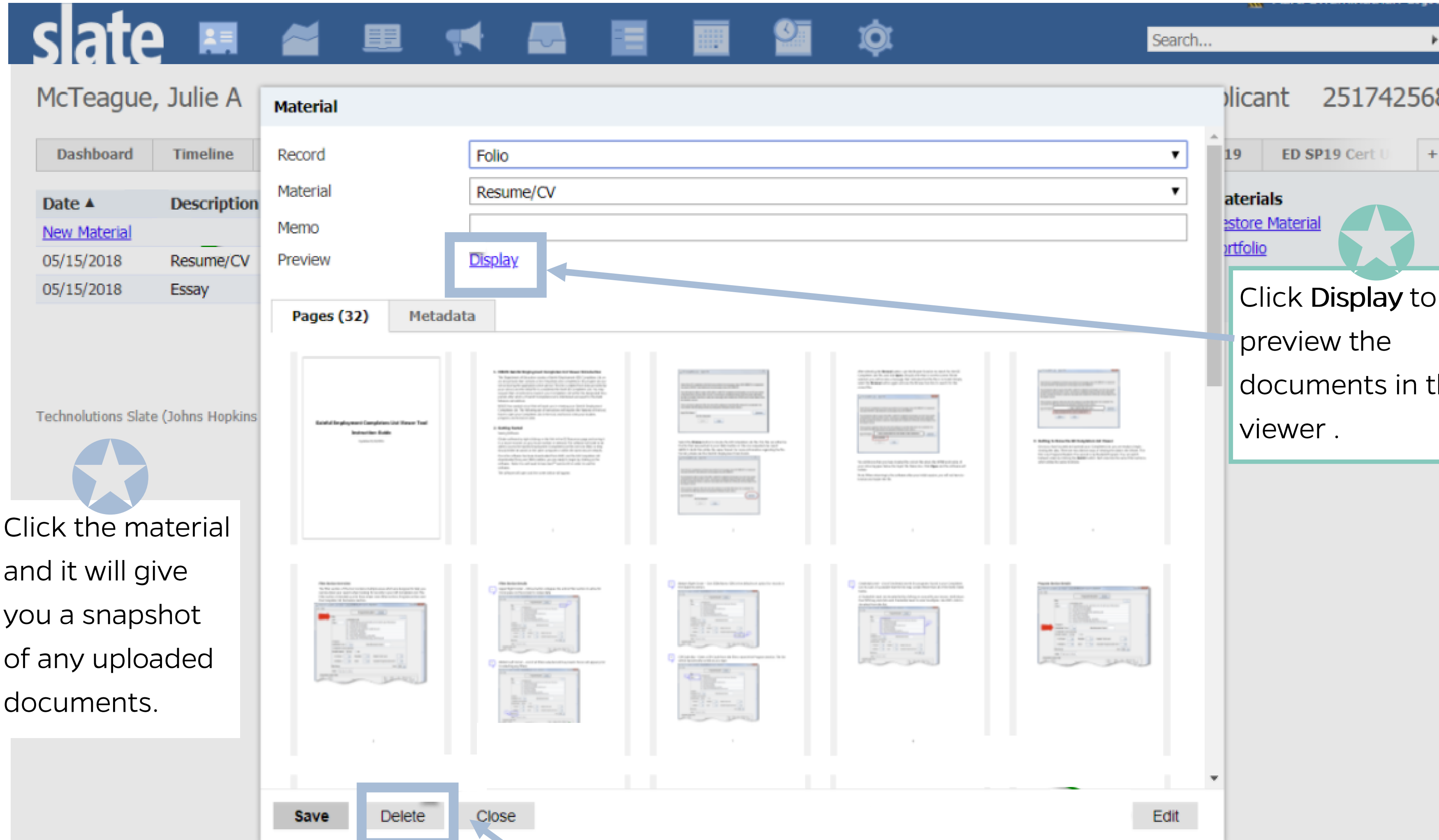


Account

Assist an applicate 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

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



Click **Display** to preview the documents in the viewer .

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

Delete

Delete the material and its uploaded documents.