Slate — Administrative Dashboard

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 dashboard navigation.

The inquiry dashboard has default tabs:

- **Dashboard**
- **Timeline**
- **Program Details Tab**
- **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.

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.
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, audit log and campaigns.

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

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.
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.
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.”

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.
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.

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