

Slate — Linking Slate to Microsoft Outlook and Email to Slate Gateway

You will need:



Internet connection



Your JHED ID and password



Web browser: Firefox, Safari or Chrome

Overview

- ★ Using the Microsoft Outlook Add-in and Slate Gateway allows for posting external emails to a Slate record.
- ★ This document is broken up into two sections: Linking Slate to Microsoft Outlook and Email to Slate Gateway

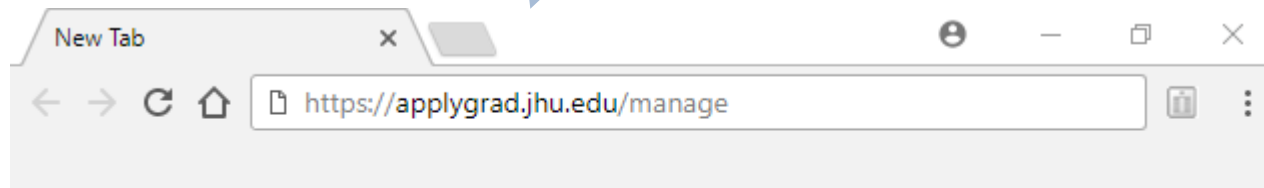
Note: Windows users can use both methods; however, **Mac users must use the Email to Slate Gateway feature** as the Microsoft Outlook Add-in feature is not available.

Linking Slate to Microsoft Outlook

This process can be utilized by Windows users only.

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, it says "Enter your Login ID and Password". There are two input fields: "Login ID" and "Password". Below these fields is a "Login" button. At the bottom right, there are links for "First time JHED User?", "Forgot Password", "Login Problems?", and "Frequently". At the very bottom, it says "© 2018 Johns Hopkins Institution". A blue arrow points from the text "Enter your JHED credentials" to the login form.

2

Click Database.

slate

Ann Shiu Logout

Search...

Welcome, Ann.

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

slate @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 accesible :-) thx @Technolutions

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

f

3

Under Messages, click **Microsoft Outlook Add-in**

The screenshot shows the Slate application interface. At the top is a blue header bar with the 'slate' logo on the left and user information 'Ann Shiu Logout' on the right. Below the header is a navigation bar with various icons. The main content area is titled 'Database' and contains a search bar. Below this is a 'Pinned Features' section with a description. The interface is organized into a grid of categories, each with a list of links:

- Records**
 - [Fields](#)
 - [Tabs](#)
 - [Prompts](#)
 - [Materials](#)
 - [Checklists](#)
 - [Tests](#)
 - [Tags](#)
 - [Activity & Interaction Codes](#)
 - [Datasets](#)
 - [Entities](#)
- Applications**
 - [Application Editor](#)
 - [Application Periods](#)
 - [Application Rounds](#)
 - [Application Logic](#)
 - [Teasers](#)
 - [Essays \(retired\)](#)
- Decisions**
 - [Release Decisions](#)
 - [Letter Templates](#)
 - [Decision Codes](#)
 - [Decision Reasons](#)
- Reader**
 - [Reader Bins](#)
 - [Reader Review Forms](#)
 - [Reader Tab Groups](#)
 - [Reader Tab Materials](#)
 - [Workflows](#)
 - [Merge Fields](#)
- Automations**
 - [Rules Editor](#)
 - [Populations](#)
 - [Origin Groups](#)
 - [Origin Sources](#)
 - [Translation Codes](#)
 - [SQL Logic](#)
 - [Triggers \(retired\)](#)
- Import**
 - [Upload Dataset](#)
 - [Batch Acquire](#)
 - [Consolidate Records](#)
 - [SFTP Explorer](#)
 - [Format Definitions](#)
 - [Transfer Objects](#)
 - [Source Formats](#)
 - [Force Process Pickup](#)
 - [Force Process Import](#)
- Queries**
 - [Query Export/Filter](#)
 - [Query Bases](#)
 - [Export/Filter References](#)
 - [Standard Query Library](#)
- Messages**
 - [Deliver Configuration](#)
 - [DKIM Configuration](#)
 - [Email Deliverability](#)
 - [Communications History](#)
 - [Message Groups](#)
 - [Email to Slate Gateway](#)
 - [Microsoft Outlook Add-in](#)

A blue arrow points from the 'Messages' category header to the 'Microsoft Outlook Add-in' link, which is highlighted with a blue box.

4

The setup.exe file will appear in the lower left corner of the screen.

Click the file to launch the setup.



Automations

[Rules Editor](#)
[Populations](#)
[Origin Groups](#)
[Origin Sources](#)
[Translation Codes](#)
[SQL Logic](#)
[Triggers \(retired\)](#)

Import

[Upload Database](#)
[Batch Acquire](#)
[Consolidate Re](#)
[SFTP Explorer](#)
[Format Definiti](#)
[Transfer Objec](#)
[Source Format](#)
[Force Process](#)
[Force Process](#)
[Scrub Address](#)

Users & Access

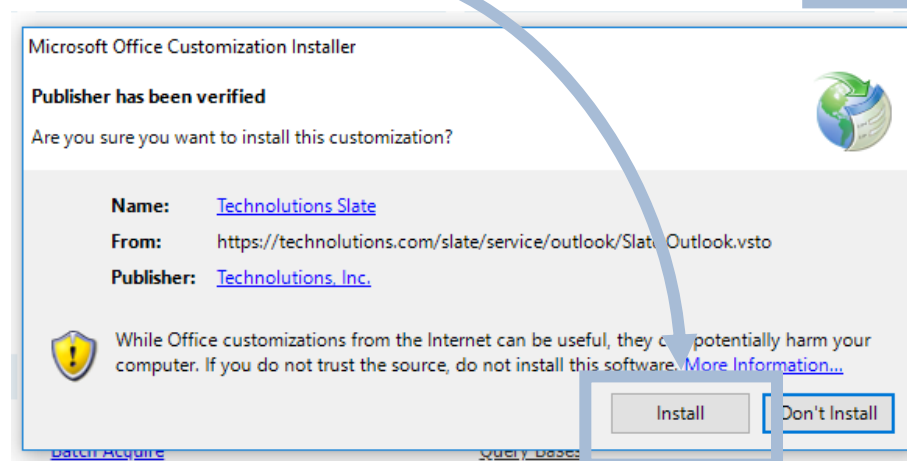
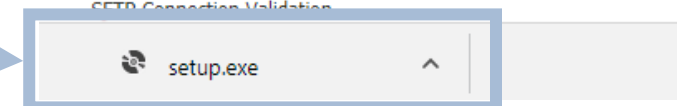
[Security Dashboard](#)
[User Permissions](#)
[Projects](#)
[Custom Permissions](#)
[Role Groups & Permissions](#)
[SFTP Connection Validation](#)

Portals

[Event Landing](#)
[Portals](#)

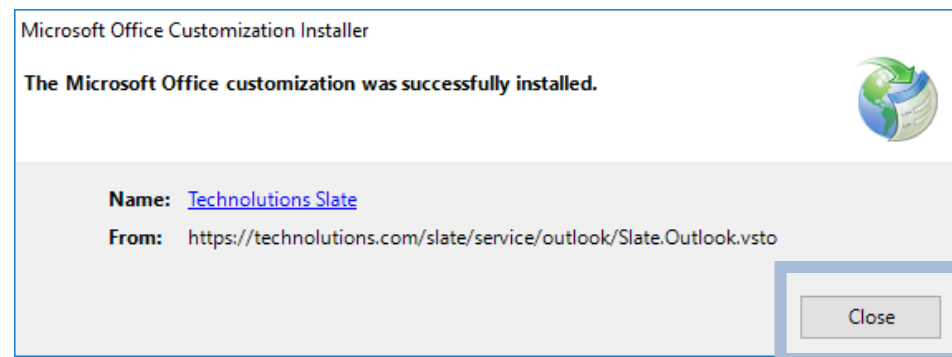
5

Click Install.



6

Click **Close** once the file is installed.



7

Restart Outlook.



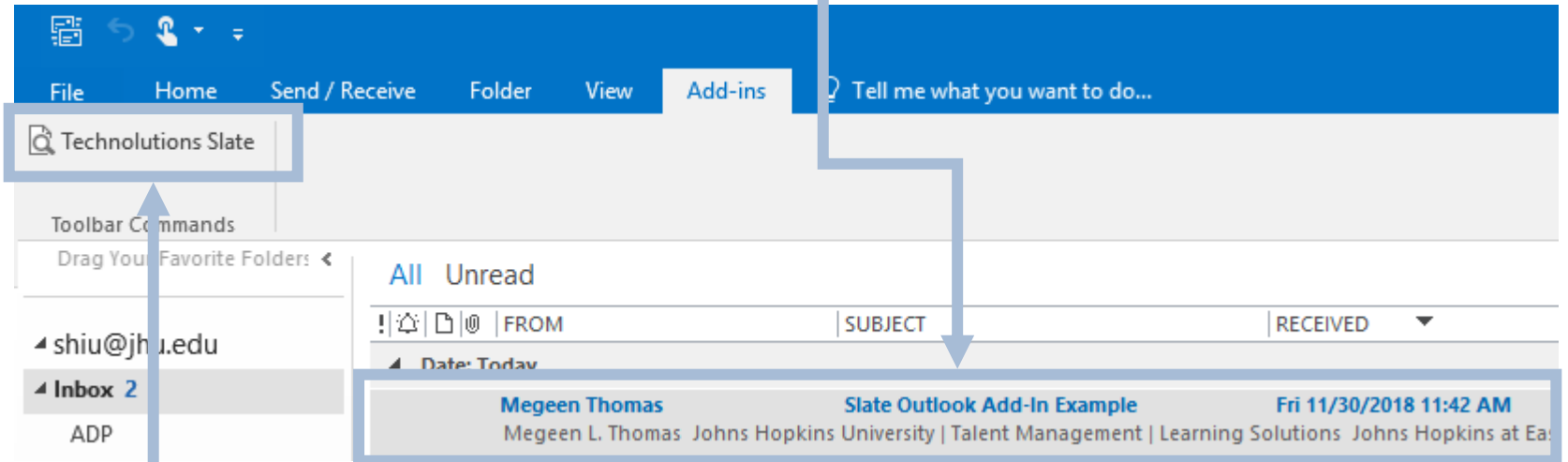
8

Click **Add-ins** from the top menu bar.



9

Highlight the email you want to import into Slate.

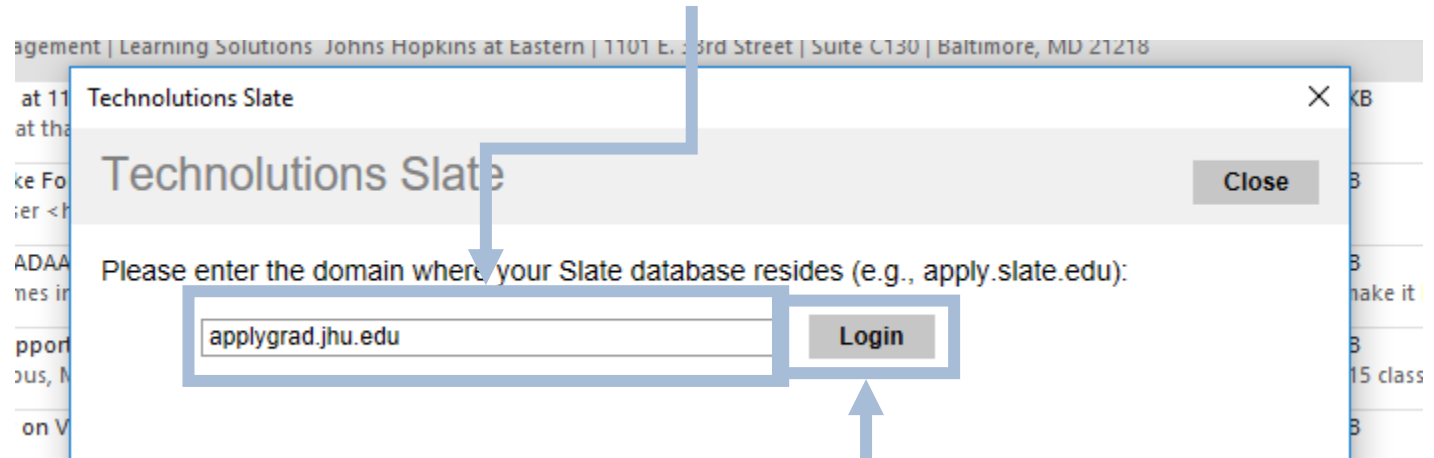


10

Click Technolutions Slate.

11

Enter the Slate domain: applygrad.jhu.edu



The screenshot shows a web browser window with a dialog box titled "Technolutions Slate". The dialog box has a "Close" button in the top right corner. Below the title bar, the text reads: "Please enter the domain where your Slate database resides (e.g., apply.slate.edu):". There is a text input field containing "applygrad.jhu.edu" and a "Login" button to its right. A blue arrow points from the text "applygrad.jhu.edu" in the instruction to the input field. Another blue arrow points from the "Login" button to the text "Click Login." in step 12.

12



Click Login.

13

Login with your JHED credentials.

ment | Learning Solutions Johns Hopkins at Eastern | 1101 E. 33rd Street | Suite C130 | Baltimore, MD 21218

Technolutions Slate

**ENTERPRISE
AUTHENTICATION**
11/30/2018 11:58 AM

Enter your Login ID and Password

Login ID

.....

Login

The purpose of Johns Hopkins Enterprise Authentication is to provide a single sign-on functionality for our customers to access many applications with just one login.

[First time JHED User?](#) [Forgot Password?](#) [Change Password?](#)

[Login Problems?](#) [Frequently Asked Questions](#)

Johns Hopkins Enterprise Authentication - v9.8.2h-23

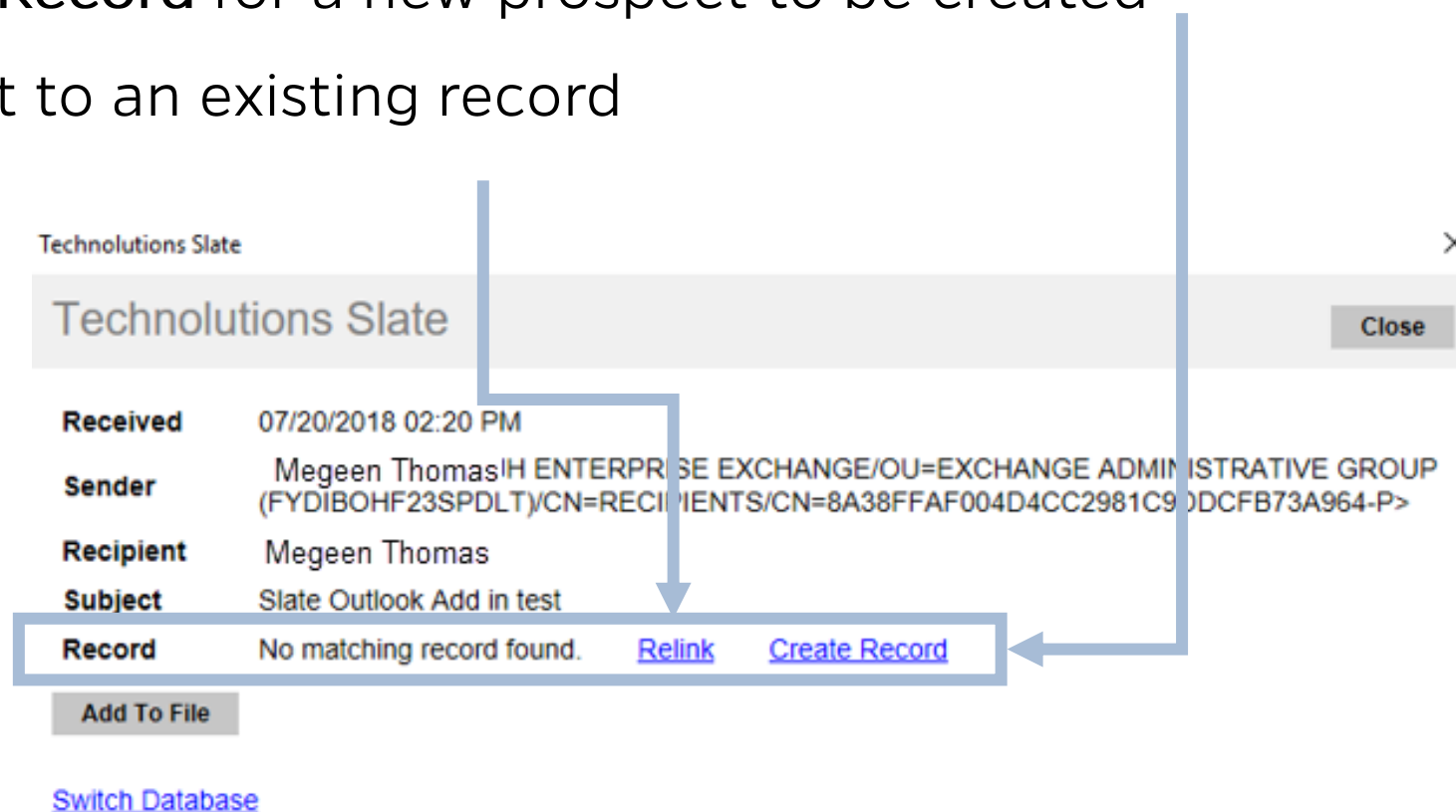
[Use of the Johns Hopkins Enterprise Directory \(JHED\)](#)

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Slate will attempt to link the email address to an existing record. It will tell you if a record was found.

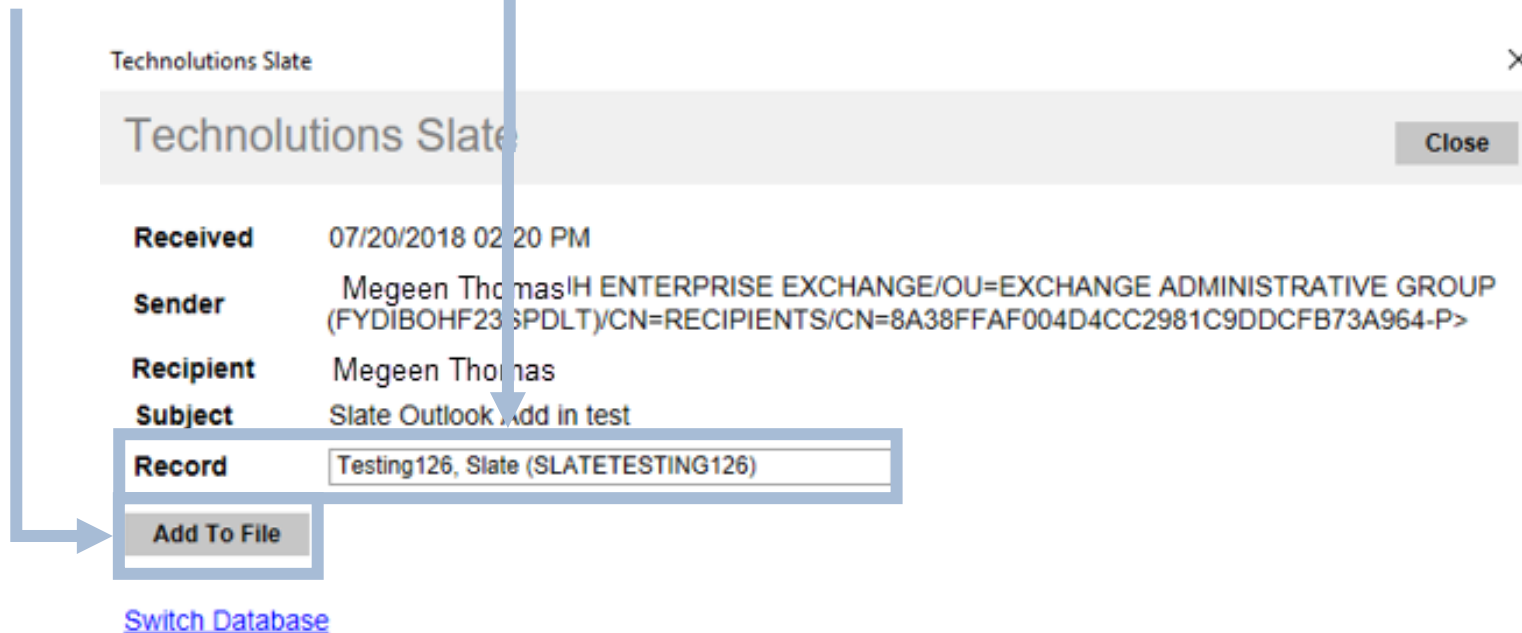
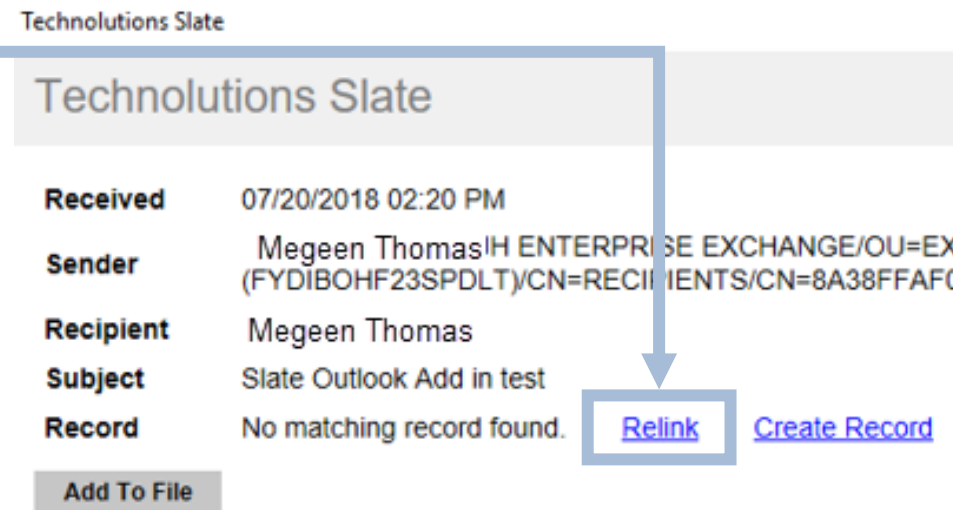
If no record was found, you can do the following:

- Create Record for a new prospect to be created
- Relink it to an existing record



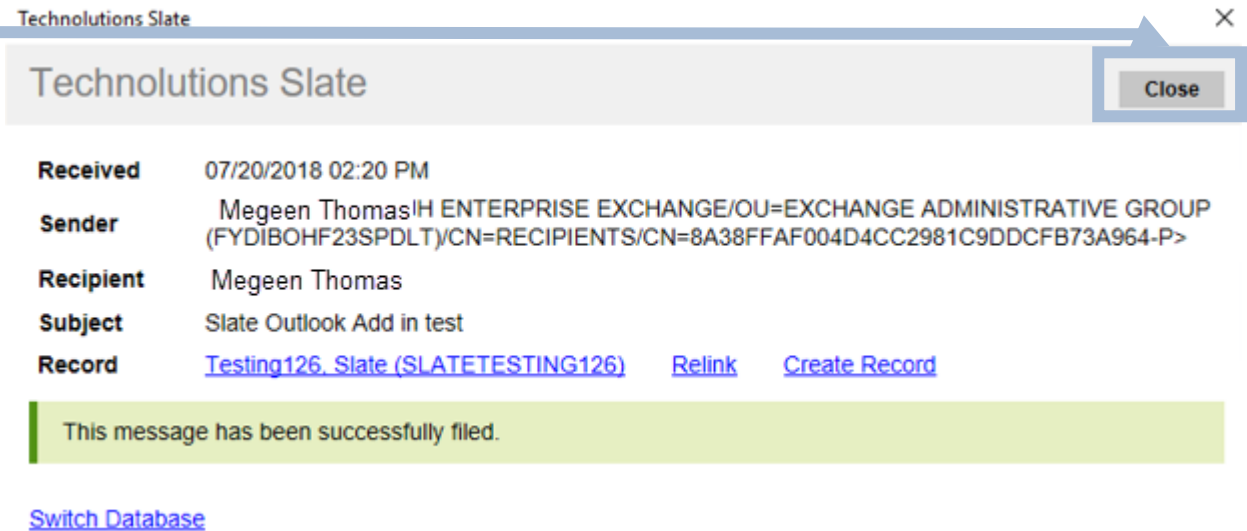
To Relink, complete the following steps:

- A** Click Relink.
- B** Type the name of the prospect or the email address. Then, select the record.
- C** Click Add to File.



A notice will appear that the message has been filed successfully.

 Click Close.



Technolutions Slate

Technolutions Slate

Received 07/20/2018 02:20 PM

Sender Megeen Thomas\H ENTERPRISE EXCHANGE/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=8A38FFAF004D4CC2981C9DDCFB73A964-P>

Recipient Megeen Thomas

Subject Slate Outlook Add in test

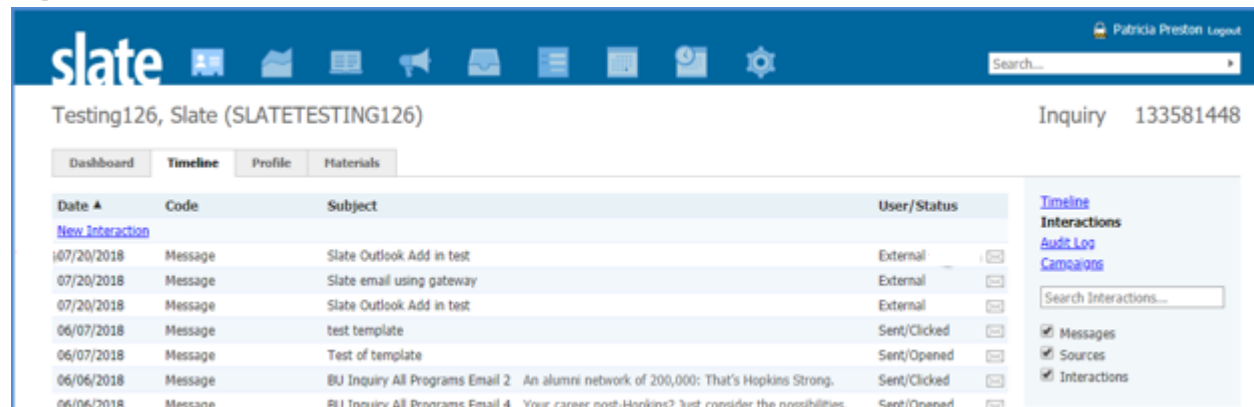
Record [Testing126_Slate \(SLATETESTING126\)](#) [Relink](#) [Create Record](#)

This message has been successfully filed.

[Switch Database](#)

The imported email will appear in Slate as an **External** interaction.

 Click the message to see the full content.



slate

Testing126, Slate (SLATETESTING126) Inquiry 133581448

Dashboard Timeline Profile Materials

Date ▲	Code	Subject	User/Status
New Interaction			
07/20/2018	Message	Slate Outlook Add in test	External
07/20/2018	Message	Slate email using gateway	External
07/20/2018	Message	Slate Outlook Add in test	External
06/07/2018	Message	test template	Sent/Clicked
06/07/2018	Message	Test of template	Sent/Opened
06/06/2018	Message	BU Inquiry All Programs Email 2 - An alumni network of 200,000: That's Hopkins Strong.	Sent/Clicked
06/06/2018	Message	BU Inquiry All Programs Email 4 - Your career post-Hopkins? Just consider the possibilities.	Sent/Opened

[Timeline](#)
[Interactions](#)
[Audit Log](#)
[Campaigns](#)

Search Interactions...

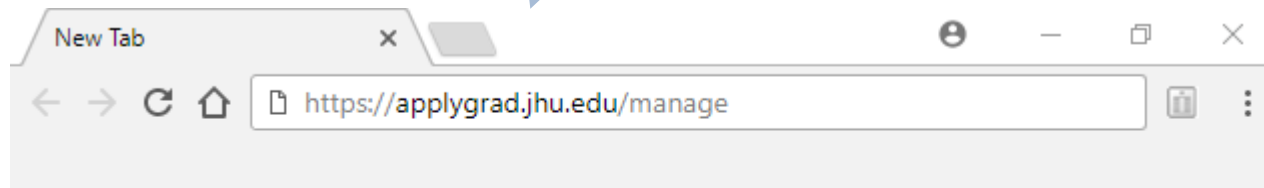
☒ Messages
☒ Sources
☒ Interactions

Email to Slate Gateway

This process can be utilized by Windows and Mac users .

1

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



Enter your
JHED credentials

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2

Click Database.

slate

Ann Shiu Logout

Search...

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 accesible :-) thx @Technolutions

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

f

3

Under Messages, click **Email to Slate Gateway**

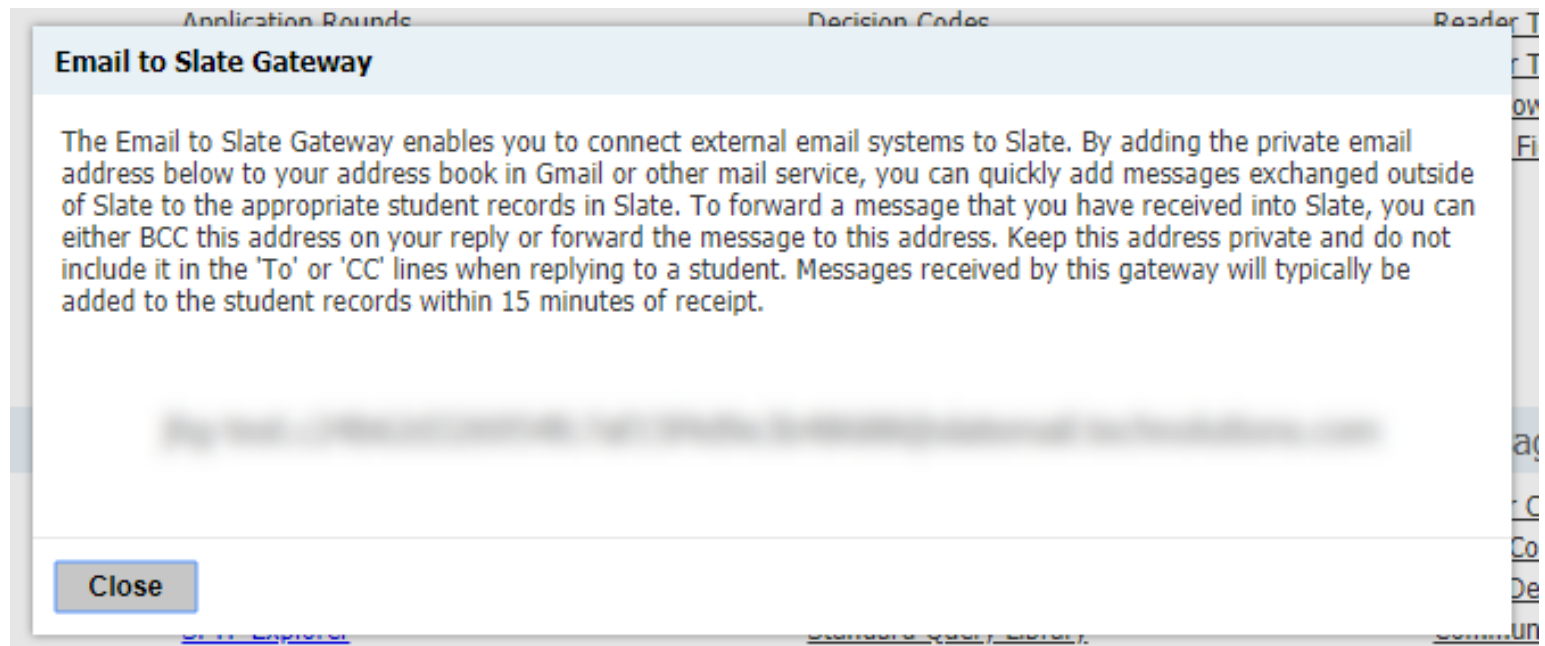
The screenshot shows the Slate application interface. At the top is a blue header with the 'slate' logo, navigation icons, and a user profile 'Ann Shiu' with a 'Logout' link. Below the header is a 'Database' section with a search bar. The main content area is divided into a grid of feature categories:

- Pinned Features:** A section with instructions on how to pin features.
- Records:** Includes links for Fields, Tabs, Prompts, Materials, Checklists, Tests, Tags, Activity & Interaction Codes, Datasets, and Entities.
- Applications:** Includes links for Application Editor, Application Periods, Application Rounds, Application Logic, Teasers, and Essays (retired).
- Decisions:** Includes links for Release Decisions, Letter Templates, Decision Codes, and Decision Reasons.
- Reader:** Includes links for Reader Bins, Reader Review Forms, Reader Tab Groups, Reader Tab Materials, Workflows, and Merge Fields.
- Automations:** Includes links for Rules Editor, Populations, Origin Groups, Origin Sources, Translation Codes, SQL Logic, and Triggers (retired).
- Import:** Includes links for Upload Dataset, Batch Acquire, Consolidate Records, SFTP Explorer, Format Definitions, Transfer Objects, Source Formats, Force Process Pickup, and Force Process Import.
- Queries:** Includes links for Query Exports/Filters, Query Bases, Export/Filter References, and Standard Query Library.
- Messages:** Includes links for Deliver Configuration, DKIM Configuration, Email Deliverability, Communications History, Message Groups, **Email to Slate Gateway** (highlighted with a blue box and a blue arrow), and Microsoft Outlook Add-in.

You will be prompted with a unique gateway code. DO NOT share this code. Note: the code has been blurred in this document for security purposes.

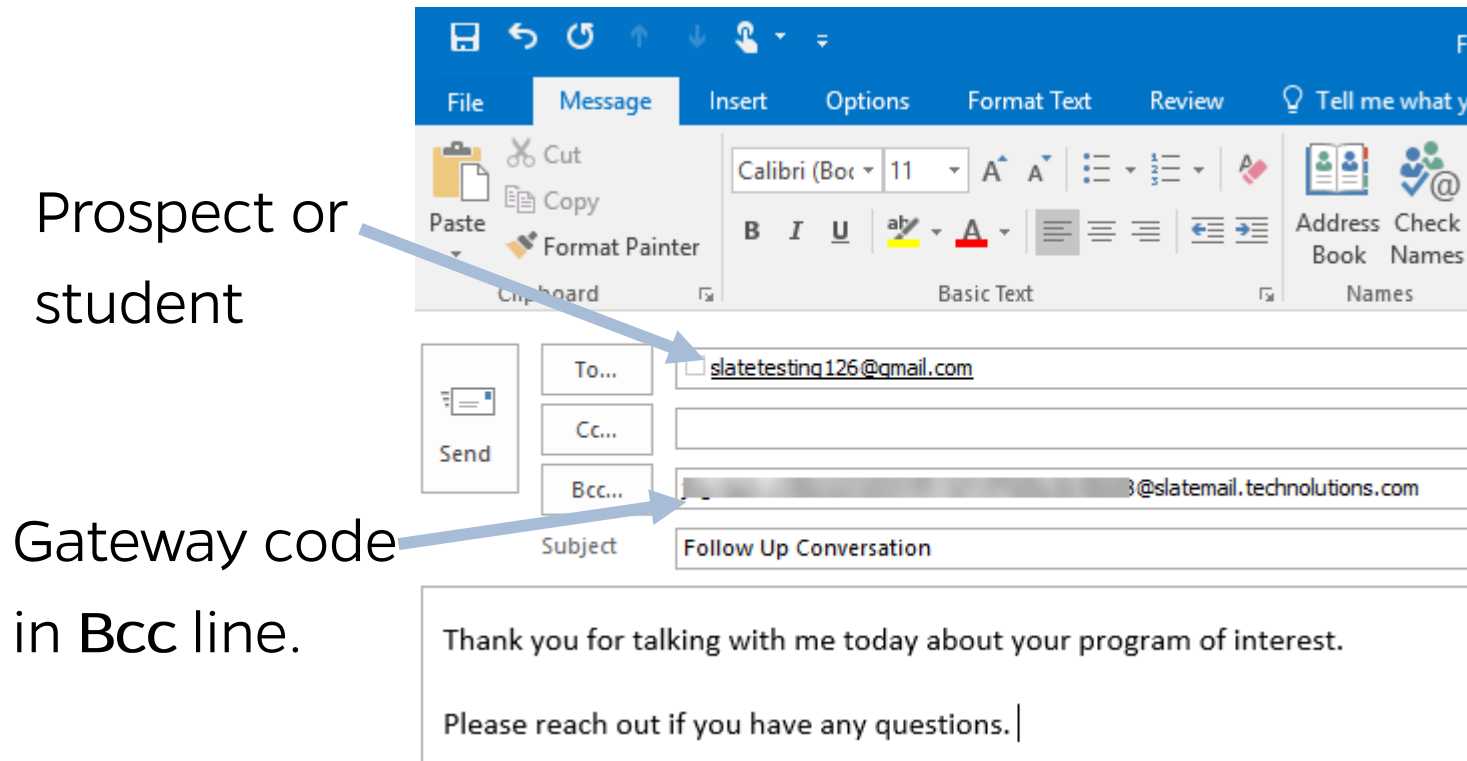


Follow the directions in the box.



Continue to the next page for an example of using this code.

Sample email that is going to be sent to a prospect or student.



Always use **Bcc** or forward the message directly to the Gateway code.

DO NOT include the gateway code in the 'To...' or 'Cc...' lines when replying to a student.

Additional Information About Using Gateway Codes

- Messages received by this Gateway will typically be added to the student records within 15 minutes of receipt.
- The imported email will appear in Slate as an **External** interaction.
- Click the message to see the full content.

Testing126, Slate (SLATETESTING126) Inquiry 133581448

Dashboard **Timeline** Profile Materials

Date ▲	Code	Subject	Use /Status
New Interaction			
07/20/2018	Message	Slate Outlook Add in test	External
07/20/2018	Message	Slate email using gateway	External
07/20/2018	Message	Slate Outlook Add in test	External

[Timeline](#)
[Interactions](#)
[Audit Log](#)
[Campaigns](#)
Search Interactions...

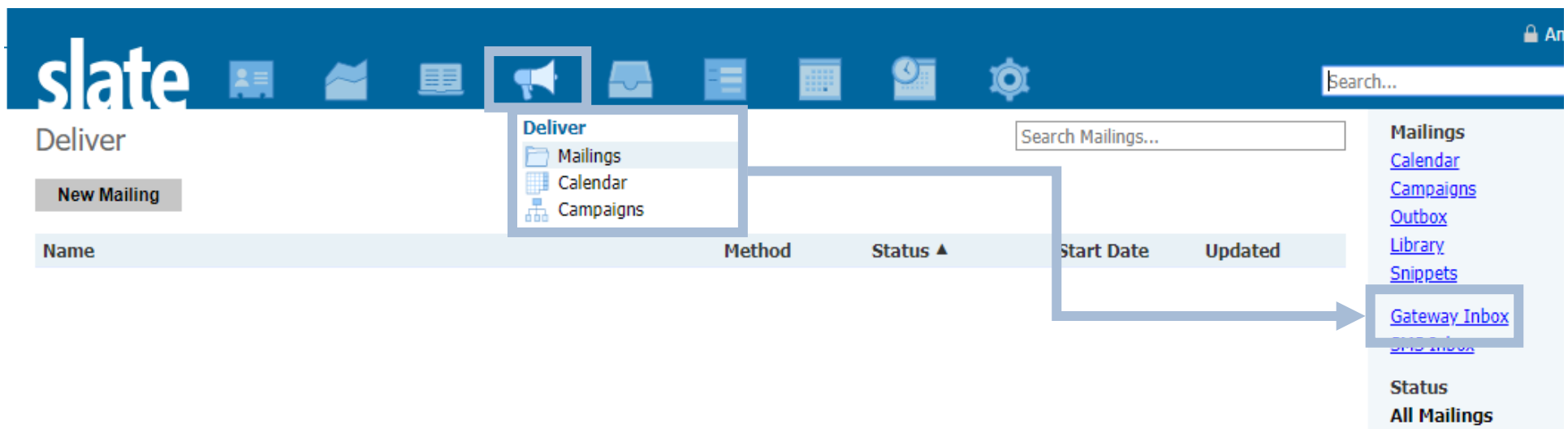
Additional Information About Using Gateway Codes (cont.)

Since you are not explicitly linking this message to the student record, access the Gateway Inbox to do so.

- Linking the messages insures the message query base shows all external emails on the person record.

A Click the **Deliver** icon on the top menu bar, then click **Mailings**.

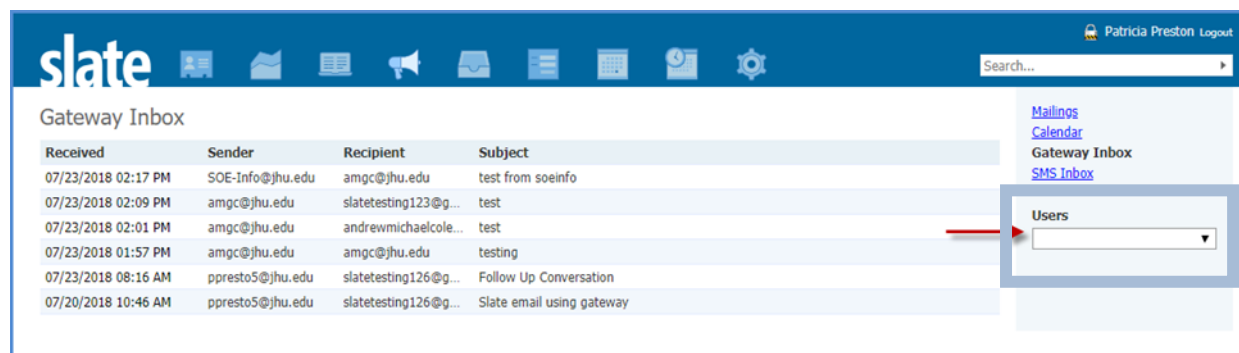
B Click **Gateway Inbox** link on the right navigation menu.



Additional Information About Using Gateway Codes (cont.)

All external emails that have not been explicitly linked to a person record, regardless of school/user will display here.

- The 'Users' dropdown, left blank, will show all records that need attention.
- You can work just those messages you sent to the Gateway by selecting your user name from the dropdown menu.
- Anyone can link the messages to person records regardless of whether they were sent by that user.



Additional Information About Using Gateway Codes (cont.)

- Click the email you want to link to a person record.
- Slate will attempt to identify which record the email should link to. If you see the correct record with blue links, **click the link** and the record will populate in the 'Assignee' block. Next, click **Assign**.
- If you do not see a correct record in blue, **start typing the name** in the 'Assignee' block until the correct record appears and then click the record to populate in the 'Assignee' block. Click **Assign**.
- The email record will then be removed from the Gateway Inbox listing.
- The practice of monitoring and maintenance of the Gateway Inbox should be implemented to ensure message queries are up to date.

