A University of Colorado Boulder Users’ Guide
When you first log in to Slate, you will see the dashboard above.

The dashboard houses many useful tools, which include:

- The Records tool, which is used to search the database and access the student record.

- The Queries/Reports tool, which is used to pull information from the database using specific search criteria and filters.

- The Reader, which opens up the Reader view. This is where faculty reviewers can see the entire application package, the applicants assigned to them, etc.

- The Deliver tool, which is used to send customized mailings to prospects/applicants.

- The Inbox, which holds messages routed into Slate (mostly for support/gradadm use).

- The Forms tool, which is used to create the application’s customized look (admin-use only).

- The Events tool, which is used for scheduling events (we will not utilize this tool at this time).

- The Interviews tool, which is used for scheduling interviews (we will not utilize this tool at this time).

- The Database, which lists the various pieces of our system (admin-use only).

- The Search bar, which can be used to search for users/particular applications.
When you select the Records tool, you will have two options:

1. Mouse-over the button but do not click: this will show a selectable list of records that you have recently viewed, as well as a ‘search database’ option:

   Records
   Search Database
   Recent
   - Prince Test, Phillip
   - Doodle, Timber
   - Doggie Test, Tessa T...

2. Click on the Records tool icon to enter the ‘Lookup’ screen:

   In the Lookup screen, you can filter for certain results (by age, citizenship, subplan, etc.) or you can search for an applicant or prospect by typing in at least 2 characters. In this way, you can search by name, email address, phone number, etc.

After you select the person, you are taken to the Student Record View.

The first page is a Dashboard, showing basic biographic/demographic/contact information, activity history:
Notice that there are several tabs you can select from the Student Record View, including Dashboard, Timeline, Specific Application Tabs, Profile, Materials, etc. These all show specific information relating to the selected applicant.

The **Timeline tab** shows a month by month listing of all interactions (emails, recommendation requests, etc.) with the applicant. The messages can be selected to show exactly what was sent, and many have a ‘resend’ option.

Click on the ‘interactions’ option in the right hand menu to see a list of messages by date, subject, and status – here you can see if messages have been opened! You can also search the list for a specific interaction.

The next tab(s) will be for a specific application if the student has started an application. The details that will always show in an **Application tab** are: the program being applied to, the status of the application/bin position of the application, when the application was submitted or last updated, the department, degree, and subplan information, citizenship information, whose queue the application is currently in, and decision information:
After you scroll past the header information listed above, you will see the Checklist, Materials, Decisions, and Activities:

### Checklist

<table>
<thead>
<tr>
<th>Insert Requirement</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>✗ CU Financial Hold</td>
<td>Awaiting</td>
<td></td>
</tr>
<tr>
<td>✗ Official English Proficiency Test</td>
<td>Awaiting</td>
<td></td>
</tr>
<tr>
<td>✔ 03/24/2017 Official GRE Score</td>
<td>Received</td>
<td></td>
</tr>
<tr>
<td>✗ Official GRE Subject Score</td>
<td>Awaiting</td>
<td></td>
</tr>
<tr>
<td>✔ 03/24/2017 GRE Score Report</td>
<td>Received</td>
<td></td>
</tr>
<tr>
<td>✗ Transcript (Alaska Christian College)</td>
<td>Awaiting</td>
<td></td>
</tr>
</tbody>
</table>

### Materials

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Record</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/17/2017</td>
<td>Application - Applicant</td>
<td>This Application</td>
<td></td>
</tr>
</tbody>
</table>

### Decisions

<table>
<thead>
<tr>
<th>New Decision</th>
<th>Decision</th>
<th>Released</th>
<th>Received</th>
<th>User</th>
</tr>
</thead>
</table>

### Activities

<table>
<thead>
<tr>
<th>Date</th>
<th>Code</th>
<th>Subject</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/17/2017</td>
<td>Payment</td>
<td>Payment Due: 80.00 USD</td>
<td></td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Received</td>
<td>Received: GRE</td>
<td>Patty</td>
</tr>
<tr>
<td>03/24/2017</td>
<td>Received</td>
<td>Received: GRE Requirement</td>
<td></td>
</tr>
</tbody>
</table>

This page will allow you to see the same checklist information the applicant sees on their status page. The information on this page should be edited by the Processing Team only, so do not make changes to these items.

**If you like to waive a department-specific requirement (e.g. recommendation letter or GRE score) notify your processor and they will waive this requirement on the checklist.**

On the right hand side of the page, there is a link: [Department Comments](#)

Click on it to open a comment box on the bottom of the page, a good place to keep any notes on file as you are working through the application. Simply click the Edit button, type in your comments, and hit Save.
There is another menu in this tab, on the right hand side of the page:

- **Overview** is the main page that loads, that was described above.
- GPAs do not have access to the Financial Aid information.
- Read Application will open the Reader tool, to show the application.
- Download PDF will download an application summary
- Selecting Edit Application Details will open a new window of options:

Here, you can see more details about the application, including if it was submitted (and when), what bin it is in, and which readers are assigned to it. Readers can be added here as well.

The **Profile tab** is another place where biographical data and contact information is shown, along with academic history and test scores. It too has a menu on the right hand side:

- **Overview** is the main default view for the tab.
- Select schools to see a full list of all colleges/universities attended.
- Select scores to see a full list of tests taken, sorted by date.
The **Materials tab** shows a list of all materials that have been uploaded into Slate either directly by the applicant or by the Processing Team on behalf of the applicant. These records are sortable by any of the headers (simply click on the one you wish to sort by), and are clickable if you wish to either display them fully or view a thumbnail of the file. In this view, the materials are sorted by date, newest to oldest:

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Record</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/17/2017</td>
<td>Application - Applicant</td>
<td>Fall: Psychology - PhD</td>
<td></td>
</tr>
<tr>
<td>03/17/2017</td>
<td>Recommendation Form</td>
<td>Fall: Aerospace Engineering</td>
<td></td>
</tr>
</tbody>
</table>

There are many types of materials including personal statements, essays, passport scans, C.V.’s/resumes, transcripts, recommendation forms, writing samples, etc.

The **Preferences tab** only shows prospective data. As such, it may be blank for some applicants.

The **Residency tab** is used by the tuition classification team to determine if an applicant is in-state or out-of-state. It is not for departmental use at this time.

**Note:**

**Prospects** are people who are in the system because they requested more information. They have not started an application.

**Applicants** are people who are in the system because they have started an application.
Queries/Reports Tool

When you first select the Queries/Reports Tool, 3 main options show:

**New Query** – select this option to begin a new auto-saved query

**Quick Query** – select this option to begin a single-use query

**Search Queries** (searchbar) – select this option and enter at least 3 letters to search for a past query

There is also a menu on the right hand side which allows a user to choose personal vs. shared queries. The best practice is to always have ‘Include shared queries’ selected.

- **Be sure Queries is selected (selected items are always bolded)**
- Reports is for building reports based on applicant data.
- Widgets is for admin use only.
- Predictions is for admin use only.
- Voyager is for admin use only.

- This allows you to select the user who created the query; it will default to your name unless you change it.
- Personal queries will only show the queries you created.
- **Include shared queries will show ALL shared queries.**

- All Folders will show every query in every folder.
- The Application folder is for admin use only.
- **This Department folder contains sub-folders for each dept. Save your query here!**

- The Mailing and Processing folders are for admin use only.

- Reader folder is for admin use only.
- The Reader-Reports folder is for admin use only.
- The Shared folder shows all shared queries.
- The System folder is for admin use only.
- **The Templates folder holds helpful templates for you!**
- The Test folder holds queries from other users (UGRAD, CE, etc.)
- Tuition Classification is for admin use only.
How to run a query:
Select New Query and this screen will appear:

<table>
<thead>
<tr>
<th>New Query</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>User</td>
</tr>
<tr>
<td>Sharing</td>
</tr>
<tr>
<td>Folder</td>
</tr>
<tr>
<td>Population</td>
</tr>
</tbody>
</table>

1. Enter the Name of your query
2. User will automatically be you
3. Check the share query box
4. Select the Department Folder, then select your specific departmental sub-folder
5. For Population ALWAYS select “Applications by Population” or “Prospects”
6. Hit Save

This process will open up the Edit Query page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Test</td>
</tr>
<tr>
<td>Population</td>
<td>Applications by Population</td>
</tr>
<tr>
<td>Execution Mode</td>
<td>Retrieve all records each time query is run</td>
</tr>
</tbody>
</table>

Exports

Filters

Estimated Rows: 89
As you can see from the image above, there are 2 main parts to queries: Exports and Filters.

**Exports** allow you to choose every item you would like to show in your query report.

**Filters** narrow down the files that information is pulled from.

For example, if you only want to know the Names, Emails, and Subplans for International Student (Foreign Nationals), ‘Name’ and ‘Email’ and ‘subplan’ would be exports and ‘Citizenship status IN Foreign National’ would be a filter. If you were looking for one subplan’s applicants, then the ‘subplan’ would be a filter instead of an export.

You can either drag over the Export field into the blank space – be sure to wait for a green line before ‘dropping’ the button into place – or you can double-click the Export button. This ‘Insert Query Part’ screen will appear:

![Insert Query Part](image)

**Be sure you select the ‘Slate Template Library’ checkbox at the top of the page.**

On this page, you can select any export that you want – either scroll through the entire list or start entering a search term in the search bar at the top. You can select multiple fields at once, but be sure to hit save.

This will automatically close the ‘Insert Query Part’ window and load your selections into the Query Editor as shown:

![Query Editor](image)

These items can then be rearranged in the list by dragging and dropping. Each individual item can be deleted by mousing over the end of the bar and hitting the red X, or edited by mousing over the end of the bar and selecting the pen and paper icon.

The Filters are a two-step process. You begin the same way you would for a export; by either dragging over the Filter field into the blank space – be sure to wait for a green line before ‘dropping’ the button into place – or by double-clicking the Filter button.
This ‘Insert Query Part’ screen will appear:

Only one item at a time is selectable from this list. In our example, I have selected ‘Citizenship Status’:

On this screen, you are controlling what information you want to show. The drop-down filter has two options: IN or NOT IN. Below that is a multi-select list that will automatically load with your available options based on which item you selected in the previous screen (to base your query on). (Note: Foreign National = INTL app)

After you make your selection, you can either hit save (if you are finished) or save and new (if you have more filters to add). Your Edit Query page will now have both exports and filters:

- Notice that the number of Estimated Rows changes when you add new filters. It reflects the number of records that fit your currently entered criteria.
Again, each individual export or filter can be deleted by mousing over the end of the bar and hitting the red X, or edited by mousing over the end of the bar and selecting the pen and paper icon that appears next to the red X.

Now that our query is built, let us turn our attention to the options at the top right of the page:

- This allows you to edit the properties of your query.
- This will not be utilized at this time.
- This allows you to edit the permissions on your query.
- This allows you to schedule exports of your query on a regular basis.
- This will allow you to preview your results in a pop-up window before running the query.
- This will not be utilized at this time.
- This will allow you to save a copy of this query (this is what you should select to copy the example queries created for you by the Graduate School).

In order to run the query, you will need to select the Query Name link at the top of the page:

Select your query name link here.

This will bring you to your query’s landing page:

On this page, select the ‘Run Query’ button to run your query!
This will bring you to the results page:

```
All Queries > Test
Test
Output: Excel Spreadsheet
```

Now, you will select how you want your information delivered to you. This is the Output which allows you to choose the method of delivery (most likely Excel Spreadsheet). The Output drop-down menu includes many options that are divided into 2 categories: Export Destinations and Batch Management.

By choosing the correct option here, you can create new mailings, downloadable spreadsheets, move files into bins and readers’ queues, and update tags/decisions/etc:

```
Rows 1-21 of 21 Prev Next
Name Email
Admissions, Grad gradadm@colorado.edu
Buttons, Theodore (Teddy) gretchen.oconnell@colorado.edu
Buttons, Theodore (Teddy) gretchen.oconnell@colorado.edu
Cat TEST, Natasha Test graduats.contest@colorado.edu
```

After you have made your selection, hit export to start that file creation. You will see a preview of your query results below the options in the drop-down list. There is also a search bar that will allow you to search within your results.

If you click on one line of your report, you will be taken to a row preview which will show all the information in that one row. In the upper right hand corner is the option to select the Previous or Next record in the query, or you can click “Lookup Record” to find the student record associated with that particular row’s information.
How to create a New Query in 10 Steps!

1. Click New Query button.
2. Name your Query (DEPT-Name of Query is the suggested format).
3. Pick the right Folder: select Department, then choose your Dept. (if your department is not shown, select Other and then type in your 4 letter abbreviation).
4. Pick Population (either ‘prospects’ or ‘applications by population’).

5. Click the checkbox to share your query.
6. Click Save.
7. Edit your query by adding your desired filters and exports.
8. Click on your query’s name in the upper left-hand corner.
9. Now that you are on your query’s main page, click Run Query.
10. Choose your Output and hit the Export button to run the query.

More Query Tips & Tricks & Timesavers

How to pin commonly used exports and filters:

Select Exports by double-clicking the icon or dragging and dropping. When the ‘Insert Query Part’ window opens, select the Edit Pinned link on the right-hand side:

This will open a new window where you can select your most commonly used Exports and Filters. After selecting, hit save and close the window. This action will cause the selected Exports and Filters to show up in the ‘Pinned Exports’ and ‘Pinned Filters’ sections in your query, so you do not have to search for them every time.

You will need to navigate out of your initial query and then re-open it to get the new Pinned Exports to show.
How to copy a query:

If you have a built a query that you do not wish to change, but you do want to modify it for another use, you should make a copy of it to edit.

1. Select your query and hit ‘edit query’.
2. On the right hand side, select ‘Save Copy.’ This will bring up a pop-up window in which you should enter the new name for your new query. You can also make sure it is in the correct folder. Note: at this stage you cannot change the designated population. It will be the same as the query you are copying.

Now you have created a new query that has all of the old Exports and Filters of the query you copied. You may now edit this new query by hitting the ‘edit query’ button.

Using the search bar to find Exports and Filters

When you are editing a query, there are many options for Exports and Filters. Be sure to always check the Slate Template Library check box at the top of the ‘Insert Query Part’ box. Now, instead of scrolling through all of the options until you find what you need, you can type in the name of the field in the search bar – so long as you enter at least 3 characters, it will start to search based on your entry.

Select multiple Exports and Filters at once

Once you click export or filter, the ‘Insert Query Part’ window will show. This allows you to select as many options as you wish. Click on each one to select it, and it will highlight the field. When you have everything you need, hit save. This is much faster than doing each piece individually!

For Filters, hit save and add to keep adding more filters at once. When you have all that you need, hit save.

Sort Key

This will allow you to sort your data/chosen fields in the query by setting it to show in Ascending or Descending order. When you select the sort key, you will be able to select the Export fields you have already added to the query. After you hit save, you can then change the sort order from ascending (the default) to descending or vice versa. Mouse over the sort key and hit the edit button to make that change.

Preview Results

To make sure you are pulling in all the data that you want, you can utilize the ‘Preview Results’ button on the top right hand side of the edit query page. This will show up to the first 50 rows of your query. Simply close the preview to continue editing your query if desired.
Another Example Query – Finding your Prospects

1. Click New Query button.
2. Name your Query (DEPT-Name of Query is the suggested format).
3. Pick the right Folder: select Department, then choose your department (if your department is not shown, select Other and then type in your 4 letter abbreviation).
5. Click the checkbox to share your query.
6. Click Save.
7. Edit your query by adding your desired exports.
8. Click on the Filter button.
   a. Check the Slate Template Library checkbox.
   b. Enter population into the search bar.
   c. Select Population (in the Prospects box) and hit Continue.
   d. You may use the search bar here to enter your Department abbreviation to search, or you can scroll through the list:

<table>
<thead>
<tr>
<th>Status</th>
<th>Active</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Population</td>
</tr>
<tr>
<td>Source Type</td>
<td>Local Filter</td>
</tr>
<tr>
<td>Estimated Rows</td>
<td>0</td>
</tr>
<tr>
<td>Population</td>
<td>IN</td>
</tr>
</tbody>
</table>

   (Note that you may have both Prospect and Trad Prospect listed. When both are present, it means that Trad Prospect are those interested in being traditional, on-campus students versus Prospect which represents those interested in professional or distance options. You can select more than one option by ctrl+clicking)
   e. Select the desired population (clicking will highlight your selection).
   f. Click Save.
9. Click on your query’s name in the upper left-hand corner.
10. Now that you are on your query’s main page, click Run Query.
11. Choose your Output and hit the Export button to run the query.

You can add additional items to this query, such as dates, by selecting additional filters.

For example, select Filter and select one of the Date settings.
Then, select Greater than or less than and enter either today or a specific date.
Note that all times are Eastern Standard Time, and that you should enter days as calendar days, not 24 hour periods.
Another Example - How to create a mailing from a query

After you have created a query, you may wish to email the entire list of applicants that you just pulled. To do so, select your query and hit the Run Query button.

In the Output dropdown, select “Deliver Mailing” and hit export. This will bring you into the Deliver Mailing tool where you can edit and then send your message.

To start working on the message, click Edit Message in the right-hand menu:

This will open up the message editor where you should enter a ‘reply to email address’ – this should be your departmental email, enter the email subject (required), and enter your message’s content. Hit save to continue.

You can preview your mailing by clicking Display Test Message, and when everything is set, Click Send Mailing to send your message to the entire recipient list you created with your query.

**Best Practice Tip: Always send a test message to yourself first! Or to one of us – just let us know it is coming.**
Slate Reader Tool

The Reader will be where submitted applications are reviewed. Simply click on the icon: to enter the reader.

Your first view will be the Home page of your reader. On the home page are some helpful tips for navigating around the Slate Reader:

Navigating the Interface

The Slate Reader is designed to be navigated using both the mouse and keyboard. While some users may be accustomed to using only the mouse to navigate web pages, using keyboard shortcuts enables faster navigation, and we’ve included several keyboard shortcuts in the Slate Reader to help you move through applications quickly.

Using the Mouse

- Click tabs in the left panel to change sections
- Double-click on a page to zoom in
- Right-click on a page to zoom out
- Click-and-drag to move within/between pages

Using the Keyboard

- **Arrow Keys:** move up/down/left/right
- **Pg Up/Pg Down:** page up, page down
- **+/-:** zoom in, zoom out
- **Tab:** next section in index
- **Shift + Tab:** previous section in index
- **1-9:** display 1st tab, 2nd tab, etc. in index
- **Ctrl + Left/Right Arrow:** rotate page (PC)
- **Cmd + Left/Right Arrow:** rotate page (Mac)
- **Q:** toggle display of queue
- **R:** toggle display of Review Form / Send to Bin
- **S:** toggle display of search
- **Esc:** close open panels, return to first section
The menu on the left hand side of the page shows you how the reader is organized:

- Click the slate button to go ‘back’ instead of clicking your browser’s back button.
- The Home button will bring you back to the ‘home’ page of the reader.
- The Browse button will show your review bins and how many applications are in each.
- The Search button allows you to search through your applications, filter your applications, or create a query.
- The Queue shows all applications currently in your personal queue to be viewed.
- The Recent button shows the applications you have recently viewed.
- Share allows users to share a current application view and work on a single file together.
- The Classify button allows users to select multiple applications and move them to a bin.
- The Help button shows information about the reader.
- The Exit button will bring you back to the main Slate interface, thus exiting the Reader.

**Browse**

<table>
<thead>
<tr>
<th>Awaiting Review</th>
<th>Program Review</th>
<th>Decision Review</th>
<th>Decision</th>
<th>Post-Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Awaiting Submission</td>
<td>E. Faculty Review</td>
<td>G. GS Admit Check</td>
<td>H. Admit</td>
<td>K. Accept Admission</td>
</tr>
<tr>
<td>47</td>
<td>6</td>
<td>0</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>B. Awaiting Payment</td>
<td>F. Committee Review</td>
<td></td>
<td>I. Deny</td>
<td>L. Decline Admission</td>
</tr>
<tr>
<td>0</td>
<td>2</td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>C. Processing (PR/IC)</td>
<td></td>
<td></td>
<td>J. Waitlist</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>D. Awaiting Materials (INCL)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>71</td>
</tr>
</tbody>
</table>

The Browse view shows the various points in the application process (bins), and how many applications are at each point. Applications move through each column, and then move right into the next column as appropriate.
Note that applications will move automatically through the first column of bins, from awaiting submission to awaiting payment to processing and to awaiting materials. Only after all items are turned in will an application be complete and ready to move on to departmental review.

One can click on any of the bins to see which applications are currently in that bin.

After each application has been reviewed, it will either be moved into the Deny bin or into the GS Admit Check (if you wish to admit that person). The GS Admit Check is when the processing team will make sure everything is complete before an admit or waitlist decision is finalized.

Finally, after the applicant is notified of the decision, they will move into either the accept admission or decline admission folder.

Search

The Search view shows a selectable list of your applications, as well as a search/filter on the right hand side, and buttons on the top including build query, refresh, and add to queue. One can utilize the filter to show applications with certain features — like a subplan for instance — or the search bar to look for a certain applicant’s name (must type in at least 3 letters for the search to function). Submitted applications are in bold while those applications that have yet to be submitted are greyed out, and both include the application status. One can double-click on any submitted application to open it in the reader view.

Clicking the Build Query button will take you directly into the quick query view. If you selected any filters while on the search page of the reader, they will automatically import into the quick query. Remember, quick queries do not auto-save, so if you wish to save the query you create here, you must click the Save Copy button on the upper right hand side.

One can use the query to assign readers to certain applications by clicking Run Query, selecting Bin as the output and clicking export, and then selecting the Queue Action ‘Add Readers’. Enter in the name of your Reader(s) into the Add Reader Box and then click either Update Selected (after selecting which files you want to assign by checking their checkboxes) or selecting Update All:

Please contact the graduate school to enter in your faculty readers’ information.
Queue

This view shows all the applications currently in your queue. No one but the faculty reviewers or other reviewers should have anything in their queue. The queue, when populated, shows a selectable list of assigned applications, as well as a search/filter on the right hand side, and buttons on the top including build query, refresh, and add to queue.

Classify

The main function of this section is to allow you to select multiple applications and move them all to a pending bin. On the right hand side above the Search bar and the Filter buttons, is a Set Pending Bin dropdown. Select which files are to be moved, select the proper bin, and click the Update button. There is also a Select All Button if you do not wish to click on everything one by one – though that would move all selected files into the same bin. Use with caution!
Deliver Mailings

The Deliver tool is used to send and schedule mailings to prospective students and applicants. When you click on the bullhorn icon, a list of mailings will be shown. Each department can set up their own mailings which will be found in their own subfolder under the Departments Emails folder. These folders are shown on the right hand side of the page.

Do not edit any mailings that are located outside of your department folder.

How to create a new mailing:

1. Either click on the Deliver icon or mouse over it and select Mailings.
2. Click the New Mailing button on the upper left of the window.
3. Name the email using this formula: DEPT – Name of Mailing.
4. Change the folder to Departments emails.
5. Choose your DEPT in the dropdown to the right, or if it does not exist, select Other and enter your department code in the text box that appears.
6. Click Save.

After the mailing is created, named, and saved in your departmental folder, you can build the message itself. There is a menu on the right hand side that will allow you to edit your recipient list, edit the message, send the mailing, or make a copy of the mailing. Since we are creating a new message in this example, select Edit Message.

1. Be sure to enter a reply-to email address – this should be the departmental email address you wish students to be able to reply to.
2. Enter the email subject you wish to use – this is a required piece of the message. You will not be able to save your mailing without a subject line in place.
Now you can type in your message. Notice the image above, which shows the full range of tools available to you during the editing process. A Departmental Email Template has also been created for you. This template is scalable between wired and mobile devices, and we highly suggest that you make use of it.

To find this template, click the paper icon.

1. Choose the Department Email Template
2. Enter in your own message by clicking into the boxes on the template, adding your own signature, etc.

**Do not change the format on the template!**

Be sure to use your signature and update the social icon links as desired. To edit, simply double-click the social icon buttons and change their links.

Click Save to save your message.

Preview the responsive email by clicking on the email or the phone icon above the message window:

- Display Sample Message
- Send Test Message

If the information does not scale properly (i.e. if a scroll bar appears), your message is not formatted correctly. You can also check your formatting by sending a test message to a non-Outlook email account.
**Edit Recipient lists**

Editing the recipient list will allow you to choose the records that will receive the mailing. There are two ways to add a recipient list: through a query or by uploading a spreadsheet.

**Query for an individual (only possible if person has a record in Slate)**

You can create a query using the same method as described on page 17 for sending to a group, but set your filters to target an individual person specifically.

The easiest way to do this is to add a last name filter and enter the entire last name of the recipient. Beware the estimated count – if there is more than one person with that last name, additional filters will need to be applied to target the correct person. Always preview the query results to confirm you have found the correct individual.

If you choose to upload a spreadsheet, the merge fields will be pulled using the header row of the file uploaded. Please contact patricia.stanfield@colorado.edu for further instructions.

At any point, you can use the breadcrumb links at the top of the page to return to the mailing.

After you set up a recipients list, you can add merge fields:

**Add merge fields**

1. Click Edit Mailing.
2. On the right side will be the fields available to use in the merge for the mailing.
3. Drag the Email field into the recipient part of the message header.
4. Place other merge fields as desired throughout the email body.
5. Click Save.

Preview what the email will look like to the recipients by clicking Display Sample Message – all merge fields will show a value from a row on the recipient list.

The email is now ready to send.
Sending the Mailing

Click Send Mailing – if attempted before all steps are complete, the system will give a red error message:

If all is in order, the Pre-Flight checks message will be green and a recipient count will be displayed:

The green message does not signify the message is what is expected, simply that the system has no reason not to allow the send. Be sure to double check the message, send test messages, check the test messages on different email clients, and have others look at them - more eyes are always better in testing!
Mailings can be sent once, or as ongoing messages that go out every day or weekly for a specified time, or forever. Note the Start and Stop time stamps are in Eastern Time; add two hours to any entry here.

Click ‘Send Mailing’ when you have finished testing your mailing.

Slate will make you confirm the send by prompting you to type SEND before the system will schedule the mailing.

The Current Status of the email will update to Scheduled/Running. If the message is a one-time send, the status will update to Completed after it is sent. If you wish to edit a mailing after you have sent it or scheduled it to send, you must click the ‘stop mailing’ button before the system will allow you to make any changes. After you make your additions/corrections, you will need to select ‘Send Mailing’ again to turn it back on.

We are happy to be your guinea pigs! You may send test messages to us – just let us know they are coming!

**Departmental Fee Waivers**

To request a fee waiver, send the following to patricia.stanfield@colorado.edu:

“The Department of XXX would like to waive the application fees for the following applicants.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Type</th>
<th>Applied for Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>McExample</td>
<td>Colleen</td>
<td>Domestic</td>
<td>Fall 20XX</td>
</tr>
<tr>
<td>One</td>
<td>More</td>
<td>Domestic</td>
<td>Spring 20XX</td>
</tr>
<tr>
<td>Cool</td>
<td>Christopher</td>
<td>International</td>
<td>Fall 20XX</td>
</tr>
</tbody>
</table>

Please charge ST XXXXXXX.

These requests will be processed, logged in a folder and the speedtype will be charged with the total amount of all submitted waivers. Waivers can be applied as soon as an application is started, so you do not need to wait for them to finish to submit this waiver. The applicant will submit like normal.

If an applicant has any other fee waiver questions (i.e. is not getting their fee paid for by the department in the method explained above), have them contact gradadm@colorado.edu with any questions.
Review & Decision

Once an application is complete, it will be moved into the **E. Faculty Review** bin, and is ready for review.

*Remember – No Queue Until Faculty Review!*

*Do Not add any applications to your faculty queues until they are in the E. Faculty Review bin – it will delay the processing team.*

The GPA should assign applications in the **E. Faculty Review** bin to the appropriate faculty queues. The easiest way to do this is through the Reader.

Select Browse from the menu on the left hand side to see applications grouped by bin:

![Slate interface showing E. Faculty Review bin]

Click on the **E. Faculty Review** bin. This will show a list of all applications currently in that bin.

At the upper right of that page you will see a menu bar.

Click on ‘Build Query’:
This will take you to the quick query screen, where a number of exports and a filter for the bin are pre-loaded into the query:

Quick Query

User: Patty Knud Steenfield
Population: Applications by Population

Exports
- Term
- Name
- Degree
- Subplan/Track
- Bin
- Submitted
- Users
- Readers
- Notes

Filters

() {
  Partial Match CONTAINS
  Bin IN Program Review - E. Faculty Review
}

Estimated Rows: 307

If you want to add any other filters (for example, subplans) you may do so. Then hit run query.

Set the ‘output’ to Bin as shown below, and then hit export:

Quick Query

Output: Bin

Export

This Bin Management screen is where you assign readers to applications through the ‘Add Reader’ text box – this will add applications to faculty queues:
Once you have typed at least 3 letters, the system will autosuggest names which can be selected. Multiple readers may be assigned at one time; simply type another name into the box and continue until you have everyone you wish to assign at this time.

There are 2 main methods of assigning applications to readers:
1. Check the box for each individual application you wish to assign, type the reader name into the ‘Add Reader’ box, and select ‘Update Selected.’
2. Add all readers you wish to assign to every application in the query list, and select ‘Update All’ to assign all applications from that query to all of the entered readers.

Note: You can also clear readers on this screen by changing the ‘Queue Action’ from ‘Add Readers’ to ‘Clear Readers.’

Once the faculty have applications assigned to them, a weekly reminder email will be sent, letting them know they have items in their queue.

The only way to turn-off this weekly notification is to clear their queue by completing the Faculty Reviewer Form for each application assigned to them.

To access the Faculty Review Form, the reader will need to select an application from their queue to open it in the Reader. Then, they will click on the ‘Review Form / Send to Bin’ button in the bottom right-hand side of the Reader:

Review Form / Send to Bin

Then select the checkbox for Faculty Review Form:

☑ Faculty Review Form

This will open the Faculty Review Form on the right-hand side of the page.
Once ‘Yes’ is selected for ‘My Review of this Application is Complete,’ one more question populates:

Recommend for Admission?
- Yes
- No
To submit the form, the reader should scroll to the end (after the recommend for admission question):

<table>
<thead>
<tr>
<th>Send to Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Bin</td>
</tr>
<tr>
<td>E. Faculty Review</td>
</tr>
<tr>
<td>Next Bin (required)</td>
</tr>
<tr>
<td>E. Faculty Review (current)</td>
</tr>
<tr>
<td>Next Reader (optional)</td>
</tr>
</tbody>
</table>

The Next Bin (required) must be set to match the Current Bin – this is the only option available.

A reader can also suggest a Next Reader (and enter comments to that reader) in the optional field. This will add this application to the entered reader’s queue.

Hit the Send button to complete the form and remove this application from the queue.

After all faculty readers have completed the Faculty Review Form for applicants in their queues (at least the last two questions, which are required), the GPA should move the applications to either the I. Deny bin or the F. Committee Review bin.

To move the applications in batch, from the Reader, select the E. Faculty Review bin to open up a list of all applications in that bin. On the right-hand side, select the second dropdown (generally set at default) and select the ‘Review Complete’ as shown below:

<table>
<thead>
<tr>
<th>Search...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Complete</td>
</tr>
<tr>
<td>Filter NOT ( OR )</td>
</tr>
<tr>
<td>Review Complete IN Yes</td>
</tr>
<tr>
<td>Queue Assignment Exists = Queue Assignment Does ...</td>
</tr>
<tr>
<td>Bin IN Program Review - E. Faculty Review</td>
</tr>
</tbody>
</table>

Note: There is also a Review Incomplete option if you want to see those that are not yet completed!

This selection automatically adds extra filters so the GPA can see, at a glance, those files which have completed Faculty Review Forms, and the recommendations for admission from those forms. These files can then be assigned to the next bin using a query.

Click on Build Query on the top right of the screen.

This will take you to the quick query screen, and you will already have the exports and filters from the reader pre-loaded into the query:

If you want to add any other filters (for example, subplans) you may do so. Then hit run query.

Set the ‘output’ to Bin and then hit export.
This Bin Management screen is where the GPA can batch move these applications to the next bin:

<table>
<thead>
<tr>
<th>Bin Action</th>
<th>Set Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bin</td>
<td>F. Committee Review</td>
</tr>
<tr>
<td>Queue Action</td>
<td>Add Readers</td>
</tr>
<tr>
<td>Add Reader</td>
<td></td>
</tr>
</tbody>
</table>

Set ‘Bin Action’ to ‘Set Bin’.

Set ‘Bin’ to the next bin – either ‘F. Committee Review’ for those files that need a final decision, or ‘I. Deny’ if they should be denied.

If moving applications into the ‘I. Deny’ bin, no readers will need to be added.

‘Queue Action’ is automatically set to ‘Add Readers’. If moving to ‘F. Committee Review’ bin, simply enter the name(s) of the one(s) making the final decisions (whether it is the GPA, Grad Director, Decision Committee Chair, etc.) in the ‘Add Reader’ box. Select either ‘Update Selected’ or ‘Update All’ as needed to move the applications to the selected bin and add those readers.

The readers added at this stage will be the ones who fill out the Decision Form in the reader for each application in the F. Committee Review Bin. The Decision Form is required.

The Decision Form is accessed in the same way the Faculty Review Form is: the reader will need to select an application from their queue to open it in the Reader. Then, they will click on the ‘Review Form / Send to Bin’ button in the bottom right-hand side of the Reader:

This will open the Decision Form on the right hand side of the Reader view:
Enter the Decision Recommendation here – Admit, Deny, Waitlist or Provisional.

Check the box here if you wish to admit the applicant to a different degree level.

Check the box here if you wish to admit the applicant to a different subplan.

If you check either box to make a change to degree level or subplan, this warning will show to remind you that a grad change form must be emailed to your processor:

Don’t forget to submit a change form to your grad processor to update the applicant’s admission to the correct plan/subplan!

Send to Bin

Current Bin
F. Committee Review

Next Bin (required)
F. Committee Review (current)

Next Reader (optional)

Send

Saving in 12s...

To submit the form, the reader should scroll to the end:

The Next Bin (required) should be set to match the Current Bin – this is the only option available.

Hit the Send button to complete the form and remove this application from the queue. This finalizes the decision.
When the Decision Form is filled out in the reader and submitted, the departmental application review is complete and the application will automatically move to its next bin.

- For Deny decisions, the application will automatically move into the ‘I. Deny’ bin.
  - The GPA can then release the deny decisions and letters after this bin movement has taken place. This can be done in a batch – instructions begin on page 37 of this manual.
- For Admit decisions (including provisional and waitlist), the application will automatically move into the ‘G. GS Admit Check’ bin.
  - The Graduate Processing team performs the final check of each application and will then move them to the next bin – either ‘H. Admit’ or ‘J. Waitlist.’

When the application has reached the ‘H. Admit’ bin, The GPA can then release the admit decision and letter.

---

*Remember – do NOT send any decision letters until the application is in the Admit or Deny bin! Decisions are not finalized until the applications have been moved, and no letters or notifications should go out until that stage.*

---

**Processing Admits**

The GS Admit letter is the default admit letter and should be used every time. In addition, the GPA may upload a specific departmental letter for each applicant, to be displayed at the same time the GS Admit Letter is shown.

This is done in the Student Record View on the application tab:

<table>
<thead>
<tr>
<th>Decisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Decision</td>
</tr>
<tr>
<td>New Decision</td>
</tr>
</tbody>
</table>

Click ‘New Decision’ to enter the Decision screen:
On this screen, set the code to Admit (or Deny or Waitlist as needed).

The ‘Reason’ selection will appear when you select the Admit Code. Select ‘Graduate Admit.’

Letter should be set to ‘2016-10-06 – Admit – GS Admit Letter’. This is the default letter for all admits.

Click the ‘Confirm’ button to confirm the admit decision.

Click the ‘Released’ button to release the decision (send it to the applicant’s status page). You can set the date and time of the release if you want the letter to be released in the future – for example, if you wanted all letters released at the same time/date.

Click the ‘Expires’ button if you wish to set a date that the offer will expire on, i.e. the date it will disappear from the applicant’s status page.

The ‘Notification’ check box will automatically show as checked after the applicant receives and views the decision letter(s).

We will not be utilizing the ‘Merge Fields’ box at this time.

The ‘Comments’ box is available if you have any comments to record at this time for this applicant – this is not displayed to the applicant.
Use the ‘Custom Letter Upload’ by selecting the Choose File button and selecting your customized departmental letter to this applicant. Note: if you offering funding, you must use the Admit Letter with Offer of Funding – either Domestic or International. These are found on the Graduate School site.

‘Custom Letter Override’ should always be set to “Show both assigned letter and custom letter.’

The screen should look similar to this (for an Admit) before you hit save:

<table>
<thead>
<tr>
<th>Code</th>
<th>Admit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reason</td>
<td>Graduate Admit</td>
</tr>
<tr>
<td>Letter</td>
<td>2016-10-06 - Admit - GS Admit Letter</td>
</tr>
<tr>
<td>Confirmed</td>
<td>Date 11/02/2017 Time (ET) 04:32:25 PM</td>
</tr>
<tr>
<td>Released</td>
<td>Date 11/02/2017 Time (ET) 04:32:25 PM</td>
</tr>
<tr>
<td>Expires</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td>Decision has been received by applicant.</td>
</tr>
<tr>
<td>Merge Fields</td>
<td>Field=Value</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td>Custom Letter Upload</td>
<td>Choose File  No file chosen</td>
</tr>
<tr>
<td>Custom Letter Override</td>
<td>Show both assigned letter and custom letter</td>
</tr>
</tbody>
</table>

Once the decision is released, an email will automatically be sent to the applicant notifying them of a status update and prompting them to log in to the status page. The admit letter and custom letter will show on the applicant status page under a “Status Update” link.

For an admit, after the applicant views the letter(s), the Reply to Offer of Admission form automatically populates on his or hers status page. The applicant uses that form to confirm his/her intent to enroll.

- If the applicant chooses to decline their offer of admission, they are automatically moved from the Admit Bin to the Decline Admission Bin.
- If the applicant confirms his/her intent to enroll, they are then prompted to pay the $200 confirmation deposit on their status page. Once the deposit is paid, the application moves from the Admit Bin to the Accept Admission Bin. Matriculation follows.
- If the applicant is an international student, they will be prompted to provide any extra materials needed for visa purposes before the confirmation deposit is due. After submitting any extra visa materials, they
pay the $200 confirmation deposit on their status page. Once the deposit is paid, the application moves from the **Admit Bin** to the **Accept Admission Bin**. Matriculation follows.

**Batch Denials**
If there are multiple denials to process at once, the GPA can do these in a batch to save time.

From the Reader, in Browse, select the **I. Deny** bin. This will show a list of all applications in the bin.

From this view, select the Build Query button in the upper right corner of the screen. This will take you to the quick query screen, and you will already have exports and a filter for the bin pre-loaded into the query:

Select Run Query.

In ‘Output’ select ‘Decision’ and then hit export:
This will open the Decision Management screen:

Select ‘Deny’ for the code, and select a letter using the ‘Letter’ dropdown menu – if your department does not have a specific letter loaded, the GS Deny Letter shown in the example above is available as a generic deny letter.

If you would like a specific department deny letter uploaded, please send it to Patty at patricia.stanfield@colorado.edu

Check the status box to confirm the decision immediately upon updating, then select ‘Update All’ or ‘Update Selected’ as appropriate.

After this, you will still need to Release the decisions. Select the database button from the top menu:

Then, select ‘Release Decisions’ under the Decisions column:

Select your decision group by checking the box and hit ‘Display’ to bring up a list of all the denials you just processed. Select the checkbox next to ‘Applicant’ to select all files:

Then, at the bottom of the page set the Release Date and hit the ‘Release’ button to make these decision letters available to the applicants:
The applicants will then get a notification that their status has been updated, prompting them to log into the Status Page. The Deny letter will be shown on the decision page under a “Status Update” link.
In summary, here is the decision process breakdown:

1. Application is ready for review once it moves into the **E. Faculty Review** Bin:
   a. GPA adds applicants to faculty queues
   b. Faculty empty their queues by evaluating applications and filling out the Faculty Review Form
2. GPA moves applications (based on the Review Form responses) to either **I. Deny** Bin or **F. Committee Review** Bin:
   a. If moved to **I. Deny** Bin, the GPA can release deny decisions and letters (this can be done in a batch or one by one)
   b. If moved to **F. Committee Review** Bin, GPA adds applicants to GPA/faculty/grad director’s queue(s) (whoever is the decision maker for admit/deny)
   c. The required Decision Form is filled out by the authority (GPA/Grad Director/etc.)
3. Application moves automatically based on the Decision Form either to **I. Deny** Bin or **G. GS Admit Check** Bin:
   a. If in **I. Deny** Bin, the GPA can release deny decisions and letters (this can be done in a batch or one by one)
4. Processor will move applications from **G. GS Admit Check** Bin to **H. Admit** Bin:
   a. If in **H. Admit** Bin, the GPA can release acceptance decisions and letters
      i. GS Admit letter must be selected
      ii. Additional custom letter may be uploaded
5. Applicant receives notification of admit, confirms intent to enroll, pays deposit and then moves from **H. Admit** Bin to the **K. Accept Admission** Bin. Matriculation follows
   OR
   Applicant receives notification of admit, declines enrollment, and then moves from **H. Admit** Bin to **L. Decline Admission** Bin.

Please send any Slate questions to patricia.stanfield@colorado.edu