

Slate Standard Queries & Reports

Slate Deliver / Queries

Each program should have five standard queries/reports:

1. Decisions – University admit – (Program)
2. GS01 – (Program)
3. GS01 – (Program) (INACTIVE)
4. (Program) – Prospect Export (no opt-outs)
5. Slate Access Report – (Program)

- The decisions query generates a current snapshot of all applicants with a final decision and is **the only way to see decisions in the Admit – University bins**.

(Bin) = program MS or programs PhD IN University Admit and University Withdraw

- GS01 – (PROGRAM): This is a current snapshot of all applicants, containing all their applicant elements.

Name, Net_Id, Program, Date Created, Date Submitted, Current Bin, School and test data, and Decision and Decision Date.

- GS01 (INACTIVE): The same report as GS01 but shows all archived/inactive applicants.
- Prospect Export: Creates a report EVERY TIME you RUN the QUERY. You can refer to past reports or delete the report, which will run from the date of the last report. This report includes all PROSPECTS who have expressed interest in your program.

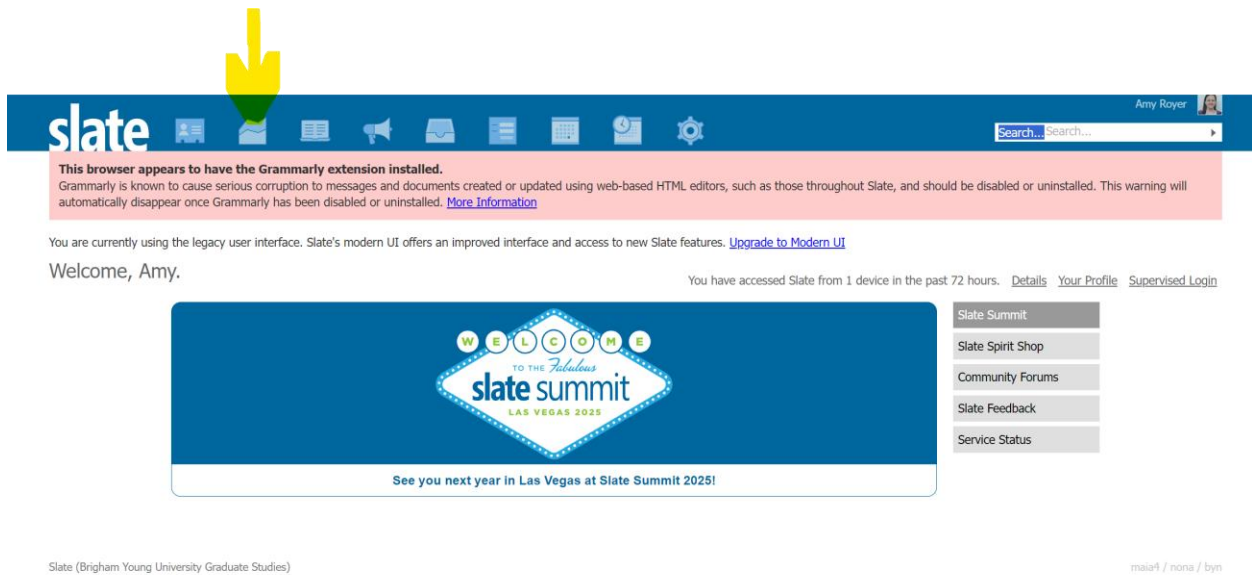
When an applicant lands on the Graduate Studies website, selects Programs, navigates to a program, and selects the Request Information button with your program selected, they will receive an email. This report indicates who requested information.

IMPORTANT: This is the same link used during the Graduate Studies recruiting efforts. You may see increased interest in October.

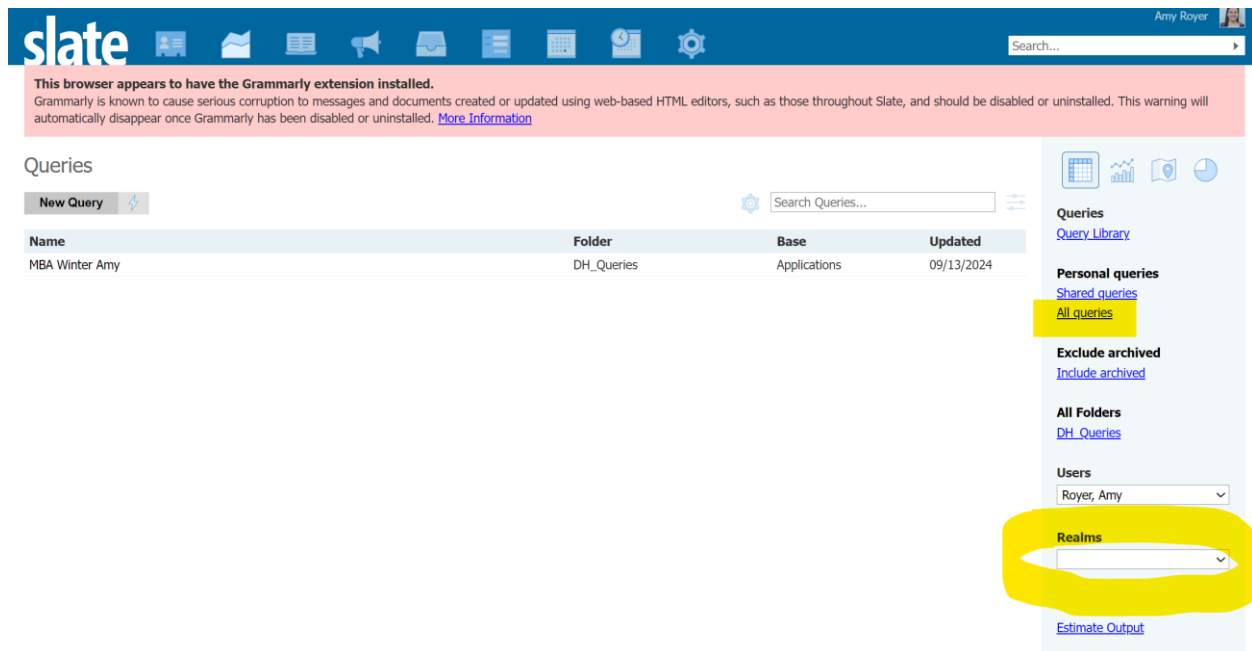
- **Slate Access Report:** This is a list of all individuals in your program who have Slate access. Audit this report at least once a year and remove individuals who no longer need access. This is important as we are audited every year on access privileges. A good time to audit is at the end of August or early September.

Using the reports:

Select the second icon from the left, Queries/Reports.



In the left-hand dropdown menu, select Queries -> Under Realms and select your program. Make sure “All queries” is selected in the same left-hand margin.



Requests for Additional Reports

Several programs have requested additional reports. If you need additional reports related to the application system's data elements, email me at doug_harvey@byu.edu to request the report and related details.

Slate Deliver / Mailings

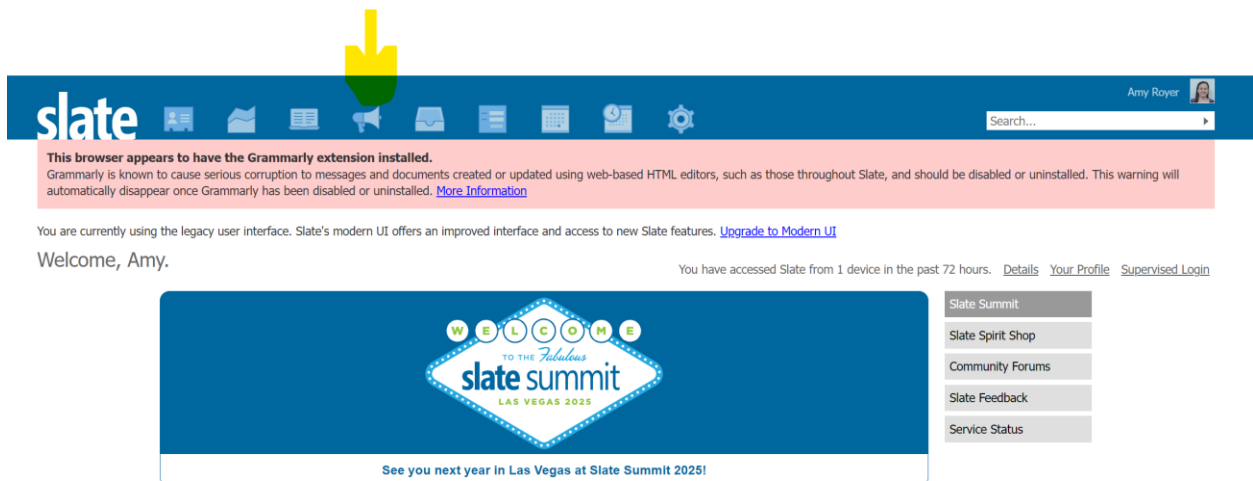
You can email nearly any applicant base in Slate for your program.

Some common use scenarios using the Slate email functionality:

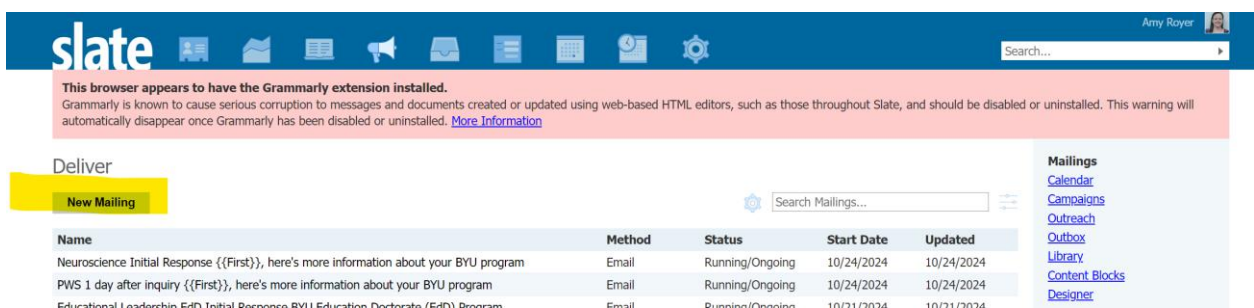
- Initial Response Email: (IMPORTANT) This email is set for every program and should be updated often. This email is sent automatically when a prospect expresses interest in your program. This email should be inviting, with images representing your program and who to contact if they want to learn more.
- Deadline Approaching Reminders: This is a common use when you need to notify applicants who have started an application and are in the Awaiting Submission bin.
- Scheduling interviews

Starting and Sending an Email in Slate

1. To send an email, select the fourth icon from the left-hand side -> Mailings -> New Mailing



2. Select “New Mailing.”



3. Enter the name for the mailing. Example: “Please join us for our virtual info session.”
4. Folder (select programs and your program)
5. Change the Opt-Out if needed: The general rule is to keep the default “Allow Unsubscribe” if you are communicating with prospects. (Important) If you are communicating with applicants in any of the bins, set this to “No Unsubscribe.” The only exception may be applicants awaiting submission.
6. Click Save.

Deliver

New Mailing

Name

Method

Status

Start Date

Updated

Opt Out

Save

Mailings

Calendar

Campaigns

Outreach

Outbox

Library

Content Blocks

Designer

Gateway Inbox

SMS Inbox

Status

All Mailings

Running/Ongoing

Running

Scheduled

Completed

In Progress

Ready for Review

All Folders

application

belonging

Electrical and Computer Engineering

Events

Grad Studies

Internal notifications

programs

recruiting

Conduct Pack

7. Select Edit Message.
 - a. Ignore the Recipient section for now.
 - b. Enter the Subject of the email.
 - c. You can set a Preheader if you want. (A small line of text that appears after the subject line. Email preheaders summarize the contents of an email.)
 - d. Enter the main body of the email.
 - e. Click Save.
8. Setting the Recipient List. Please call or send an email indicating that you have created the email – the name of the email and the base you want it sent to. (doug_harvey@byu.edu)

9. Send Mailing:

- a. Pre-Flight Checks: Generally, you can ignore most of the warnings. YOU CANNOT SEND DECISION-RELATED emails.
- b. Frequency:
 - i. Send mailing once. Send the email only once.
 - ii. Send mailing on a recurring basis.
 - 1. Set the send dates and times, if needed.
 - iii. Deduping:
 - 1. Do Not Dedupe messages
 - a. Even if the email address for a record already exists as the recipient of the same mailing, the record with that email address will receive the message again.
 - 2. Set to send only one email to the recipient
 - a. If multiple records exist with the same email address in a query run, only one message will be sent per email address. The system will skip other records with that email address when it sends the mailing.
 - 3. Allow recurring delivery
 - a. Warning: This option will send the same message to the same recipient multiple times. Use it primarily for notification-type emails.
 - 4. Send Mailing