



Technolutions Slate User Guide

Graduate Division

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What is Slate?

Slate is a comprehensive admissions system that comprises CRM (Customer Relationship Management) and Application platform. It is currently being used by over 750 institutions including many UC Graduate Divisions. It is designed and developed exclusively for higher education admissions and recruitment.

Currently, UCR's Graduate Division is using the CRM portion of Slate. This tool allows us to communicate with students throughout the admissions and recruitment lifecycle, from prospects until they become admitted students.

Slate is a robust system. In addition to a communications tool, Slate has several components to assist graduate faculty and staff. In this user manual, you will find many of the features Slate provides. Slate is easy to use and user friendly.

How to Access Slate:

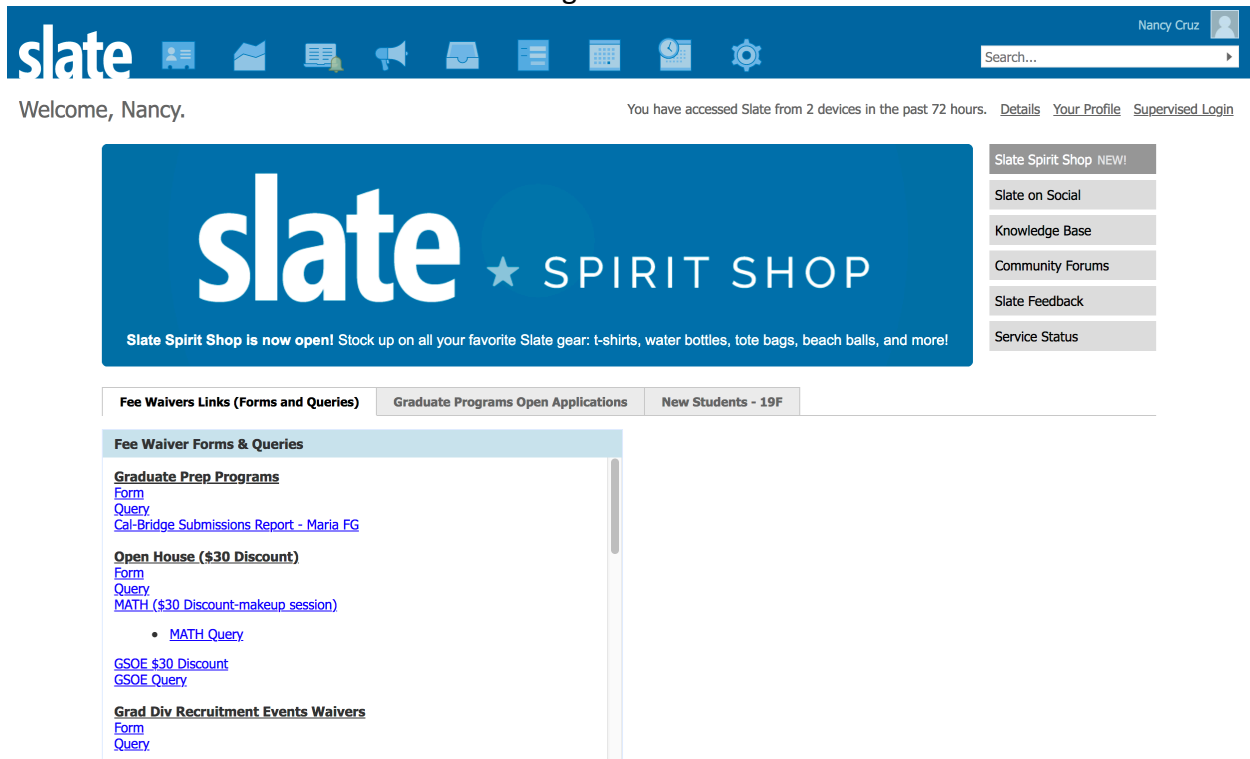
To get user access to Slate, please fill out the following form:

<https://grad.ucr.edu/register/SlateRequest>










To access Slate, please use the following link:

<https://grad.ucr.edu/manage>

The Slate Dashboard should look something similar to:



Slate Options:

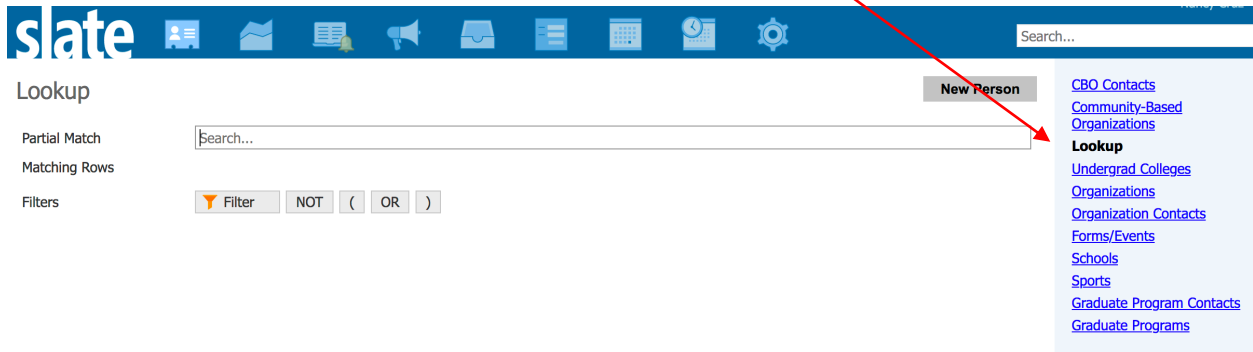
								
Records	Queries & Reports	Reader	Deliver	Inbox	Forms	Events	Schedul er	Database

Person Record:

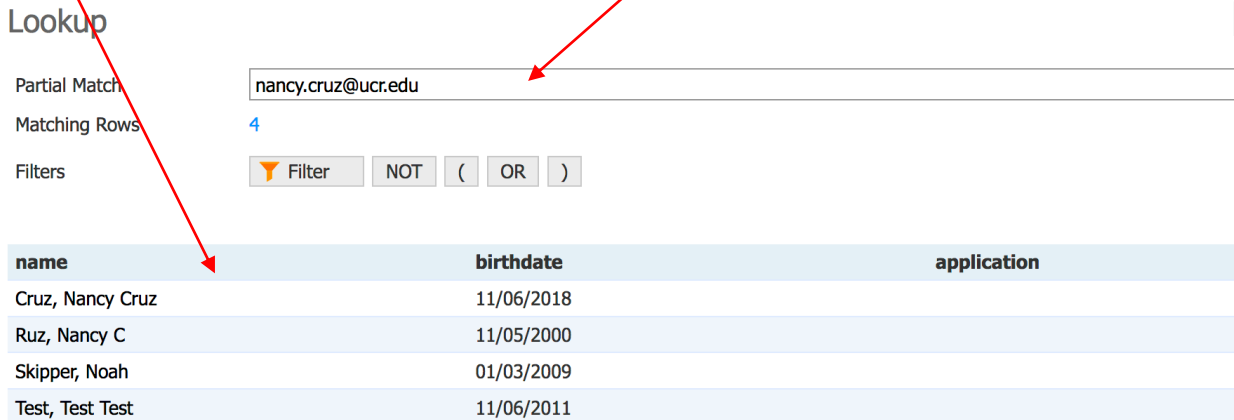
There are two ways to access a student record in Slate. First is using the Records tab on the Slate dashboard:



Click on the Records tab. Be sure that "Lookup" is selected:

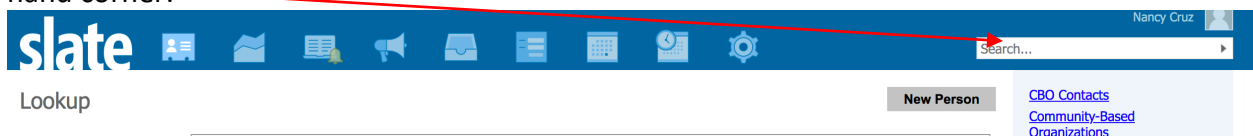




You can search a student record by name (first or last), or e-mail. Search for an individual by typing in the partial match search bar. Anyone matching what you entered will be displayed below.



Each name provided is an active link and can be clicked to view the student's record.

A second way to look for a contact/student in Slate is to use the Search bar in the upper right-hand corner:



slate  Nancy Cruz 

Lookup New Person

Partial Match

Matching Rows 4

Filters Filter NOT (OR)

nancy.cruz@ucr.edu

Prospects

Cruz, Nancy Cruz
Ref: 244511551, DOB: 11/06/2018

Ruz, Nancy C
Ref: 180945105, DOB: 11/05/2000

Skipper, Noah
Ref: 352948002, DOB: 01/03/2009

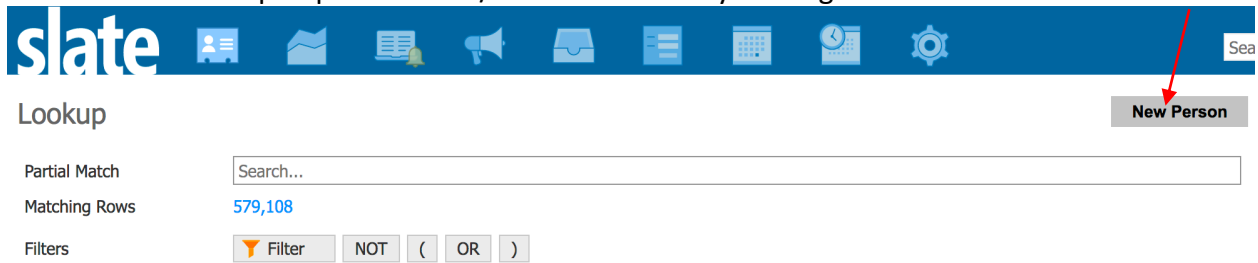
Test, Test Test
Ref: 185465799, DOB: 11/06/2011

[Organization Contacts](#)

Click on the name to bring up the student record.

How to Add a New Student/Contact:

You can add a new prospect student/contact in Slate by clicking the “New Person” button.



However, this will not add the contact into a deliver campaign, since there is no way to add a program of interest. A new contact can be added through the following link:

<https://connect.ucr.edu/register/prospectgradstudent>

This will ensure that the contact added will be added to the appropriate communication flow. New contacts can also be added through department RFI (Request For Information) forms created through Slate. Please contact Nancy Cruz (nancy.cruz@ucr.edu) to setup a department RFI.

The timeline on a person record shows a compilation of all communications the student has received.

MacDonald, Lana Inquiry 11591107

Dashboard **Timeline** Profile Materials UA Person

06/09/2020 06/09/2020

2020 June

06/09 2:11:36 PM [Sent Message](#) UCR Master of Public Policy Program - Thank You for Your Interest!

06/08 11:55:34 PM [Form Submitted](#) Prospect Grad Student

Firefox

[Set Default Tab](#)

Slate by Technolutions (University of California, Riverside) mala4 / luna / L

The timeline will show all communications sent. If the student has opened the email, there will be a line showing that interaction as well. Clicking on Interactions will show all interactions with the student record. You will be able to see how the record was added to Slate. In this example, the record was added through the Prospect Grad Student form.

MacDonald, Lana Inquiry 115911077

Dashboard **Timeline** Profile Materials UA Person

Date ▲	Code	Subject	User/Status
New Interaction			
06/09/2020	Message	#1 from SAO UCR Master of Public Policy Program - Thank You for Your Interest!	Sent
06/08/2020	Source	Prospect Grad Student	

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

Search Interactions...

Messages
 Sources
 Interactions

[Set Default Tab](#)

The Audit Log will show all access to the record.

MacDonald, Lana Inquiry 115911077

Dashboard **Timeline** Profile Materials UA Person

03/11/2020 06/09/2020 Refresh

2020 Jun

06/09 8:19:42 PM [Record Access](#)

06/09 2:11:33 PM [Query Execution](#) Query Execution of #1 from SAO (deliver-afternoon)

06/08 11:59:31 PM [Audit Event](#) Population Added - GD_SPP_Prospect

06/08 11:59:31 PM [Status Change](#) Status Change: Inquiry

06/08 11:55:35 PM [Field Set](#) Program of Interest set to Public Policy

06/08 11:55:35 PM [Field Set](#) Student Level (Person) set to Grad Prospect

06/08 11:55:35 PM [Person Created](#) Person Created

Nancy Cruz
Mark Manalang

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

[Set Default Tab](#)

The Campaigns section will show you if the record is currently in a campaign. If the record is old or has already received all communications in the campaign, this section will be empty.

MacDonald, Lana

Inquiry 115911077

Dashboard	Timeline	Profile	Materials	UA Person			
		06/09/2020		09/07/2020	<input type="text"/>	Refresh	Timeline Interactions Audit Log Campaigns
>= 6/9/2020 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Afternoon		#1 from SAO UCR Master of Public Policy Program - Thank You for Your Interest! Program of Interest IN Public Policy Student Level IN Grad Prospect Population Timestamp Days IN GD_SPP_Prospect; = 1		Running/Ongoing Preview Check Logic			
>= 6/13/2020 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Afternoon		#2 from MPP Ambassador Why I Applied for the MPP Program at UC Riverside Population Timestamp Days IN GD_SPP_Prospect; = 5 Program of Interest IN Public Policy Student Level IN Grad Prospect		Running/Ongoing Preview Check Logic			
>= 6/18/2020 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Afternoon		#3 from Graduate Advisor Faculty & Research at the UCR School of Public Policy Population Timestamp Days IN GD_SPP_Prospect; = 10 Program of Interest IN Public Policy Student Level IN Grad Prospect		Running/Ongoing Preview Check Logic			
>= 6/23/2020 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Afternoon		#4 from Dean Make an I-MPP-ACT with a UCR MPP Degree Population Timestamp Days IN GD_SPP_Prospect; = 15 Student Level IN Grad Prospect Program of Interest IN Public Policy		Running/Ongoing Preview Check Logic			
>= 6/28/2020 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Afternoon		#5 from Career Services Career Services at the UCR School of Public Policy Edit Subject Population Timestamp Days IN GD_SPP_Prospect; = 20 Program of Interest IN Public Policy Student Level IN Grad Prospect		Running/Ongoing Preview Check Logic			

The Profile tab in the student record allows you to see all information on the student record..

MacDonald, Lana

Inquiry 115911077

- Dashboard
- Timeline
- Profile**
- Materials
- UA Person

Biographic

Lana MacDonald

Contact

Email lanavalemacdonald@gmail.com

Overview

- [Biographical](#)
- [Contact / Address](#)
- [Relationships](#)

- [Schools](#)
- [Scores](#)
- [Jobs](#)
- [Courses](#)
- [Interests](#)
- [Sports](#)

- [Account](#)
- [Workflows](#)
- [Create Application](#)
- [Restore Application](#)
- [Edit Slate ID](#)
- [Edit Restricted Access](#)

[Set Default Tab](#)

Clicking on one of the links on the right will bring up information if it is available. You can also edit or add information that way.

MacDonald, Lana

Inquiry 115911077

- Dashboard
- Timeline
- Profile**
- Materials
- UA Person

Name

Prefix

First (Given)

Middle

Last (Family)

Suffix

Preferred First

Other Last Names Used

Preserve Formatting

Biographical

Sex

Birthdate

Deceased

Citizenship

Primary Citizenship

Dual Citizenship

Social Security Number

Save

[Overview](#)

- Biographical**
- [Contact / Address](#)
- [Relationships](#)

- [Schools](#)
- [Scores](#)
- [Jobs](#)
- [Courses](#)
- [Interests](#)
- [Sports](#)

- [Account](#)
- [Workflows](#)
- [Create Application](#)
- [Restore Application](#)
- [Edit Slate ID](#)
- [Edit Restricted Access](#)

The student record of someone that has an application will look different than a prospect record.

Arellanes Castro, Guadalupe

Applicant 229286719

Dashboard | Timeline | Graduate Applica... | Profile | Materials | UA Person

Biographic
Female
Born 05/15/1993, age 27

Graduate Applications - 2019-2020
Started 11/19/2018

Activity History

Academic History
[Csu Los Angeles](#), Master of Arts
Latin American Studies
Los Angeles, CA
Geomarket: CA-19 East Los Angeles
[Csu Long Beach](#), Bachelors of Art
Women's, Gender and Sexuality St
Long Beach, CA
Geomarket: CA-22 Long Beach
[El Camino College](#), Non-Degree
N/A
Torrance, CA
Geomarket: CA-20 South Bay

Inglewood, CA
CA-21 South & South Central Los Angeles

142 W Kelso St
Inglewood, CA 90301-2238

Contact
Email garellanes.castro@gmail.com
Phone +1 310-431-5302
Mobile [+1 310-431-5302](tel:+13104315302)

Tags
Deferment GradDivision GRE
Graduate Division Prepared I-20 Opt Out Puente
Riverside County Education Collaborative
Test Record Umoja

Status History
[11/19/2018 Applicant](#)

[Set Default Tab](#)

The Graduate Application tab will have information on the application. Clicking on Program/Degree Details will show the details of the application.

Arellanes Castro, Guadalupe

Applicant 229286719

Dashboard | Timeline | **Graduate Applica...** | Profile | Materials | UA Person

Graduate Applications - 2019-2020

No decision on file.

[In Progress](#)
Last updated November 13, 2019

Checklist

[Insert Requirement](#)

X	GRE Score Report	Awaiting	
----------	------------------	----------	--

Materials

Date ▲	Description	Record	User
New Material			

Decisions

Effective ▲	Decision	Released	Received	User
New Decision				

Activities

Date ▲	Code	Subject	User
New Activity			

[Set Default Tab](#)

Overview

- [Financial Aid](#)
- [Workflows](#)
- [Portfolio](#)
- [Populations](#)
- [Read Application](#)
- [Download PDF](#)
- [Impersonate > Applications](#)
- [Impersonate > Status Page](#)
- [Edit Application Details](#)
- [GOAINTL-APP](#)
- [Program/Degree Details](#)
- [SAAADMS - App](#)
- [SGASTDN-APP](#)
- [SZAUSDA-APP](#)
- [SPAIDEN](#)
- [Grad Application Details](#)

Arellanes Castro, Guadalupe

Dashboard | Timeline | **Graduate Applica...** | Profile | Materials | UA Person

Graduate Applications - 2019-2020

No decision on file.

[In Progress](#)
Last updated November 13, 2019

GradSIS Application ID#
100148253

Application Status
Accepted - Final

Application Details

Application Term
Fall 2019

Graduate Program
Ethnic Studies

Degree Objective
Doctor of Philosophy

Grad Staff Assigned

SID
861024002

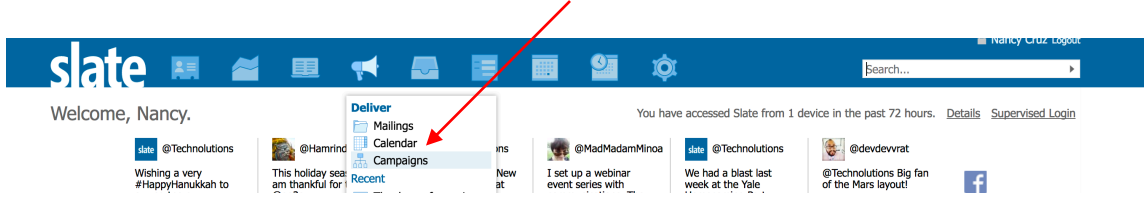
[Edit](#)

[Set Default Tab](#)

Campaigns:

To Add Communications to a Current Campaign:

Hover over the Deliver icon and click on Campaigns.



Find and click on your program's folder:

A screenshot of the 'Campaigns' section in the Slate dashboard. It shows a table with columns for 'Name', 'Mailings', 'Running', and 'Updated'. A red arrow points to the row for 'GD_CEE_SIR'.

Name	Mailings	Running	Updated
GD_AHS_Prospect	2	0	09/06/2018
GD_ANTH_Admits	1	0	11/13/2018
GD_ANTH_Prospect	2	0	08/30/2018
GD_ANTH_Saved	1	0	11/13/2018
GD_ANTH_SIR	4	0	11/14/2018
GD_BCMB_Admits	3	0	11/14/2018
GD_BCMB_Applicant	2	0	11/14/2018
GD_BCMB_Prospect	3	3	07/26/2018
GD_BCMB_Saved	4	0	11/14/2018
GD_BCMB_SIR	4	0	11/15/2018
GD_BIEN_Admits	5	0	11/20/2018
GD_BIEN_Applicant	6	0	11/20/2018
GD_BIEN_Prospect	5	5	08/13/2018
GD_BIEN_Saved	10	6	11/16/2018
GD_BIEN_SIR	5	0	11/20/2018
GD_BMSC_Prospect	3	0	09/06/2018
GD_BMSC_Saved	2	0	11/26/2018
GD_CEE_Admit	4	0	11/06/2018
GD_CEE_Applicant	11	0	11/06/2018
GD_CEE_Prospect	4	4	08/13/2018
GD_CEE_Saved	8	0	11/06/2018
GD_CEE_SIR	6	0	11/06/2018
GD_CHEM_Prospect	1	1	10/09/2018
GD_CHEM_Saved	1	0	12/03/2018

Click on New Mailing.

slate

GD_CHEM_Prospect

New Mailing

Rules

There have been no rules created for this population.

Statistics Show

Mailings

+5
Mon, Tue, Wed,
Thu, Fri, Sat, Sun;
Overnight

[Letter from Grad Div Dean](#) Running/Ongoing [Preview](#)

UCR Chemistry Graduate Program - Welcome from the Dean

Population Timestamp Days IN GD_CHEM_Prospect; = 5

OR

Program of Interest IN Chemistry

Has Form/Event Registration = Yes

Fill out the Name of your new communication.

Select the Graduate Division Folder and then your program's folder.

Enter the Number of Days when you'd like the communication to go out. If you'd like the email to go out one day after someone becomes a prospect, enter the number "1". If you'd like the email to go out five days after someone becomes a prospect, enter the number "5", etc.

Interest IN Chemistry
 ent Registration = Yes

New Mailing

Name	<input type="text" value="Thank you for your interest"/>
Folder	Graduate Division / CHEM
User	Cruz, Nancy
Method	Email
Opt Out	Allow Unsubscribe (default)
UTM Tracking	Disabled
Population	GD_CHEM_Prospect
Time Interval Type	Number of Days
Number of Days	<input type="text" value="1"/>
Hide from Timeline	<input type="checkbox"/>

Click "Edit Message" to begin editing your email:

All Campaigns > GD_CHEM_Prospect

Thank you for your interest Edit

Method	Email
Folder	Graduate Division / CHEM
User	Nancy Cruz
Recipient Lists	Thank you for your interest (live query) No exports have been configured for this recipient list. Population Timestamp Days IN GD_CHEM_Prospect; = 1
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	Allow Unsubscribe (default)

Message

Reply To	
Sender	"UCR Connect" <connect@ucr.edu>
Recipient	
CC	
Subject	

Please be sure to edit the Reply To, Sender and Subject Fields.

No exports have been configured for this recipient list

Send Mailing

Edit Message


Reply To (opt.)

Sender "UCR Connect" <connect@ucr.edu>

Recipient

CC

Subject Version 1



B *I* U ~~S~~ | | | | | | | | | | | Search | | | |

B *I* U ~~S~~ | | | | | | | | | | | Format | Font | Size | **A** | **A**

[Edit Attachments](#)

Click Save when you are done.

How to Edit a Current Campaign:

To see your communications, hover over the “Deliver” icon and click “Campaigns” on the drop down menu:

The screenshot shows the Slate dashboard interface. At the top, there is a navigation bar with the 'slate' logo and various icons. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Welcome, Nancy.' message and a feed of tweets. In the center, there is a 'Deliver' dropdown menu that is open, showing options like 'Mailings', 'Calendar', 'Campaigns', and 'Recent'. A red arrow points from the text above to the 'Campaigns' option in this menu. On the right, there are social media feeds and a search bar.

Click on the folder for your program on the right side menu:

The screenshot shows the Slate dashboard interface. At the top, there is a navigation bar with the 'slate' logo and various icons. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Campaigns' table with columns for 'Name', 'Mailings', 'Running', and 'Updated'. On the right, there is a navigation menu with options like 'Mailings', 'Calendar', 'Campaigns', 'Populations', and 'Overview'. A red arrow points from the text above to the 'Campaigns' folder in this menu.

Name	Mailings	Running	Updated
GD_BCMB_Prospect	3	1	07/26/2018
GD_BIEN_Prospect	6	0	08/13/2018
GD_CEE_Prospect	4	0	08/13/2018
GD_CMDB_Prospect	3	0	07/26/2018
GD_CSE_Prospect	3	0	08/13/2018
GD_EE_Prospect	6	0	08/13/2018
GD_EEOB_Prospect	4	0	07/30/2018
GD_ENSC_Prospect	4	0	07/26/2018
GD_ENTM_Prospect	2	0	07/26/2018
GD_ENTX_Prospect	3	0	07/30/2018
GD_GGB_Prospect	3	0	07/30/2018
GD_GLSC_Prospect	3	0	07/30/2018
GD_GSOE_MA	5	5	07/17/2018
GD_GSOE_ME	5	5	07/17/2018
GD_GSOE_PhD	5	4	07/17/2018
GD_GSOE_TEP	6	6	07/17/2018
GD_MATH_Prospect	3	0	07/30/2018
GD_MCBL_Prospect	3	0	07/30/2018
GD_ME_Prospect	7	0	08/13/2018
GD_MSE_Prospect	5	0	08/13/2018
GD_NRSC_Prospect	2	0	07/26/2018
GD_PLBL_Prospect	3	0	07/30/2018
GD_PLPA_Prospect	3	0	07/30/2018
GD_STAP_Prospect	2	0	07/30/2018

This will bring up the communications for your prospects. To edit a communication, click on the title of the communication:

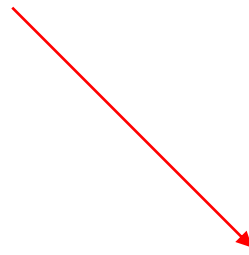
The screenshot shows a user interface for managing prospects. At the top, there is a blue navigation bar with the 'state' logo and several icons. Below the navigation bar, the page title is 'GD_CEE_Prospect' and there is a 'New Mailing' button. The 'Rules' section indicates that the population is determined by the following rules:

- [CEE Prospects](#)
Program of Interest IN Chemical and Environmental Engineering

The 'Statistics' section has a 'Show' button. The 'Mailings' section displays a list of four mailings, each with a count, a title, a subtitle, and a 'Population Timestamp Days' filter. A red arrow points from the text above to the title of the first mailing, 'Thank you for your interest'.

Count	Title	Subtitle	Filter	Status
+1	Thank you for your interest	UCR CEE Program - Thank you for your interest	Population Timestamp Days IN GD_CEE_Prospect; = 1	In Progress Preview
+3	Email from Grad Div Dean	UCR CEE - Welcome from the Dean	Population Timestamp Days IN GD_CEE_Prospect; = 3	In Progress Preview
+10	Funding Opportunities	UCR CEE - Funding Opportunitites	Population Timestamp Days IN GD_CEE_Prospect; = 10	In Progress Preview
+24	Research tracks	UCR CEE - Research Tracks	Population Timestamp Days IN GD_CEE_Prospect; = 24	In Progress Preview

Click on "Edit Message" on the right side menu:



Thank you for your interest

Method: Email
Folder: Graduate Division / CEE
User: [Nancy Cruz](#)
Recipient Lists: [Thank you for your interest](#) (live query)
[Population Timestamp Days](#) IN GD_CEE_Prospect; = 1
Current Status: Not Running
Start Date/Time:
Stop Date/Time:
Opt Out: Allow Unsubscribe (default)

Message

Reply To: gradcee@engr.ucr.edu
Sender: "UCR CEE Program" <gradcee@engr.ucr.edu>
Recipient: {{Email}}
CC:
Subject: UCR CEE Program - Thank you for your interest

Edit

- Edit Recipient Lists
- Edit Message
- Send Mailing
- Copy Mailing

- Display Sample Message
- Send Test Message



Dear {{First}},

Thank you for your interest in the [UCR's Chemical & Environmental Engineering \(CEE\) Graduate Program](#). We are excited that you are interested in becoming a part of our dynamic and engaging graduate student body. Our students enjoy access to state-of-the-art research facilities, first-rate professors, and worldwide networking that comes from being part of the prestigious UC System. In addition, we offer competitive financial packages and excellent research opportunities.

CEE's research is at the forefront of our nation's commitment to energy independence and sustainability. The UCR CEE Program is housed in Bourns College of Engineering (BCOE). BCOE has been the fastest growing engineering program in the UC system, widely recognized as the best system of public higher education in the world. BCOE combines the intellectual and material resources of the UC system with a uniquely intimate research environment, fostering frequent faculty-student interactions rarely found at other universities.

Adrienne Thomas, the CEE Graduate Student Affairs Officer, will be happy to assist you with the application process. She can be reached at (951) 827-2859 or gradcee@eng.ucr.edu.

We encourage you to complete your application as soon as possible.

Clicking on “Edit Message” will bring up your communication. You can now make changes to the communication.

Edit Message

Reply To (opt.)

Sender

Recipient

CC

Subject

B I U S | | |

Department of Chemical and Environmental Engineering *We Engineer Excellence*

Dear {{First}},

Thank you for your interest in the [UCR's Chemical & Environmental Engineering \(CEE\) Graduate Program](#). We are excited that you are interested in becoming a part of our dynamic and engaging graduate student body. Our students enjoy access to state-of-the-art research facilities, first-rate professors, and worldwide networking that comes from being part of the prestigious UC System. In addition, we offer competitive financial packages and excellent research opportunities.

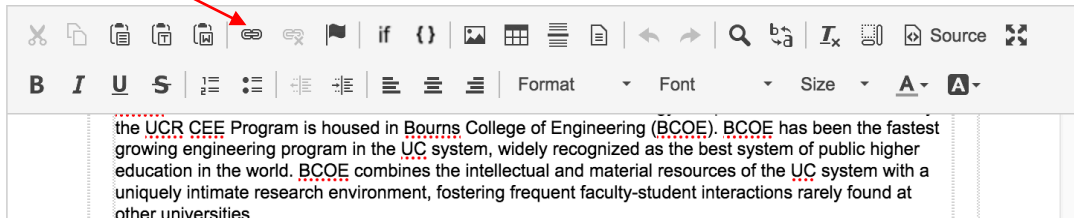
[Edit Attachments](#)

Adrienne Thomas, the CEE Graduate Student Affairs Officer, will be happy to assist you with the

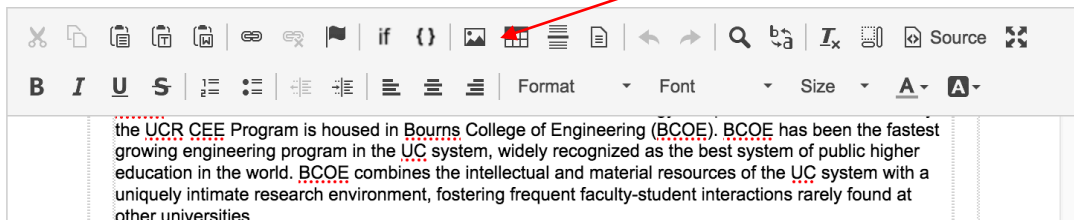
Things to look for:

- Reply To (opt.): make sure there is an email address in this field. If a prospect clicks reply, this is the email address that will receive the email.
- Sender: This is what the prospect will see as the sender of the email. This information can be edited. If you do edit, please be sure that the name of the program stays between the two quotation marks (ex: "UCR CEE Program") and that the email address stays between the two arrows (ex: <gradcee@engr.ucr.edu>)
- Recipient: Please do not change this field. It should contain the following: {{Email}}.
- Subject: This is the subject line the prospect will see when receiving this communication.

- To add a link to your communication, highlight the text and then click on the chain icon:

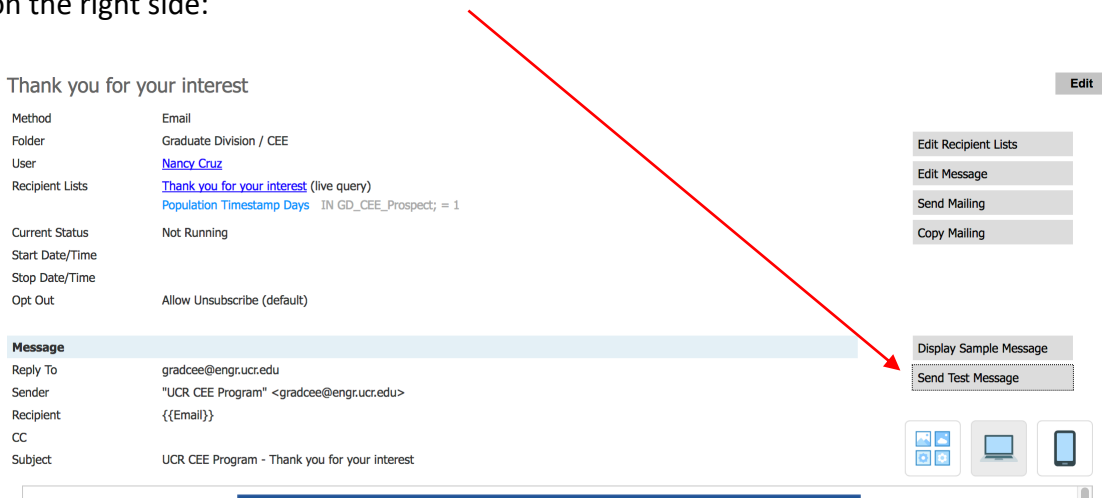


- To add or edit a picture, click on the image icon:



Click save when you are done updating/making changes.

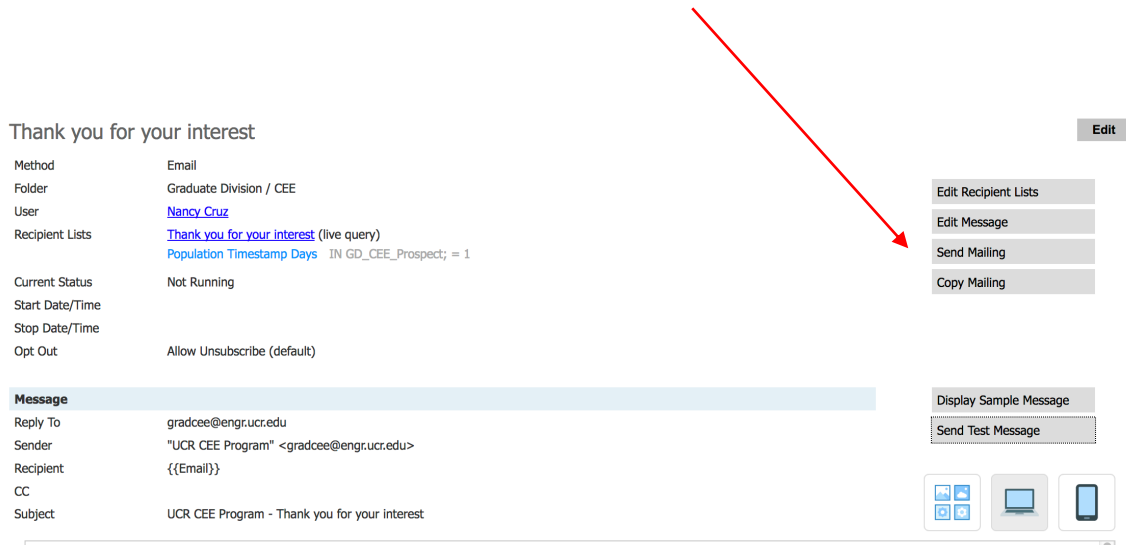
You can send a test message of the communication by clicking on the “Send Test Message” link on the right side:



Once you are satisfied with your prospect communications, you can either contact Nancy Cruz to have the communications go live, or you can set the communications to go live yourself.

Sending a Communication:

To make the communications “Live”, click on the Send Mailing link on the right side:



The screenshot shows a communication management interface. On the left, there is a table of communication details. On the right, there is a vertical menu of action buttons. A red arrow points from the text above to the 'Send Mailing' button in the right-hand menu.

Thank you for your interest	
Method	Email
Folder	Graduate Division / CEE
User	Nancy Cruz
Recipient Lists	Thank you for your interest (live query) Population Timestamp Days IN GD_CEE_Prospect; = 1
Current Status	Not Running
Start Date/Time	
Stop Date/Time	
Opt Out	Allow Unsubscribe (default)

Message	
Reply To	gradcee@engr.ucr.edu
Sender	"UCR CEE Program" <gradcee@engr.ucr.edu>
Recipient	{{Email}}
CC	
Subject	UCR CEE Program - Thank you for your interest

Buttons on the right side of the interface:

- Edit
- Edit Recipient Lists
- Edit Message
- Send Mailing (highlighted by a red arrow)
- Copy Mailing
- Display Sample Message
- Send Test Message

Mobile device icons (tablet, laptop, smartphone) are visible at the bottom right.

This will bring up a “Send Mailing” screen:

Send Mailing

Pre-Flight Checks

No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing before sending.

Estimated Recipients

Upon clicking Send Mailing, the following actions will be taken:

0 records will be considered for immediate delivery.
No records will be excluded as a result of suppression lists.

The recipient count is determined from the following lists:

1. Thank you for your interest (live) - 0 records

Recipient Lists

Thank you for your interest (live)

Batch Size (optional)

Send max messages and suspend.

Review

This message is ready for review.

Outbox

Send to outbox and do not deliver automatically.

Ongoing

Continue running mailing indefinitely.

Start Date/Time

Time: Eastern Time

Deduping

Delay Delivery

Delay delivery until a specific time.

Send Mailing

Save Settings

Cancel

GE's research is at the forefront of our nation's commitment to energy independence and sustainability.

Things to look for on the Send Mailing screen:

- Make sure that the Pre-Flight Checks message is green. If you have a red message, there is an error in the filter that will prevent the communication from going out. Contact Nancy Cruz if you have any error message.
- Ongoing: Please check the “Continue running mailing indefinitely” box. Clicking this option will make Slate send out this communication every day if there are any new prospects.

Send Mailing

Recipient Lists Thank you for your interest (live)

Batch Size (optional) Send max messages and suspend.

Review This message is ready for review.

Outbox Send to outbox and do not deliver automatically.

Ongoing Continue running mailing indefinitely.

Start Date/Time Time: Eastern Time

Stop Date/Time Time: Eastern Time

Weekdays Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Delivery Window Overnight: 2:00am–4:00am
 Morning: 10:00am–12:00pm
 Midday: 12:00pm–2:00pm
 Afternoon: 2:00pm–4:00pm
 Evening: 8:00pm–10:00pm

Deduping

Delay Delivery Delay delivery until a specific time.

Send Mailing Save Settings Cancel

- Start Date/Time and Stop Date/Time: You can enter a start and stop date if you like. This is optional.
- Weekdays: Check every day of the week, including weekends. If you do not select all days of the week, the flow of your communications will be affected.
- Delivery Window: Click a time frame that you would like your communications to go out.
- Deduping: This should be left at “Send only one message/recipient”. If this option is not selected, the prospect may receive the same message more than once.

When you are done, click the green “Send Mailing” link.

Send Mailing

Recipient Lists Thank you for your interest (live)

Batch Size (optional) Send max messages and suspend.

Review This message is ready for review.

Outbox Send to outbox and do not deliver automatically.

Ongoing Continue running mailing indefinitely.

Start Date/Time Time: Eastern Time

Stop Date/Time Time: Eastern Time

Weekdays Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Delivery Window Overnight: 2:00am–4:00am
 Morning: 10:00am–12:00pm
 Midday: 12:00pm–2:00pm
 Afternoon: 2:00pm–4:00pm
 Evening: 8:00pm–10:00pm

Deduping

Delay Delivery Delay delivery until a specific time.

Send Mailing Save Settings Cancel

You will get a screen asking for confirmation. Type SEND if you are certain you want the communication to go live.

To confirm that you want to SEND this mailing, type SEND into the box below.

Cancel OK

If your communication was set up correctly you will see the following message:

Thank you for your interest

Method Email
Folder Graduate Division / CEE
User [Nancy Cruz](#)
Recipient Lists [Thank you for your interest](#) (live query)
[Population Timestamp Days](#) IN GD_CEE_Prospect; = 1
Current Status **Scheduled/Running**
Start Date/Time 08/28/2018 12:01 PM
Stop Date/Time Sending until suspended
Opt Out Allow Unsubscribe (default)

Message

Reply To gradcee@engr.ucr.edu
Sender "UCR CEE Program" <gradcee@engr.ucr.edu>
Recipient {{Email}}
CC
Subject UCR CEE Program - Thank you for your interest



Edit

This mailing is active. To edit the recipient lists or message, stop the mailing.

Stop Mailing

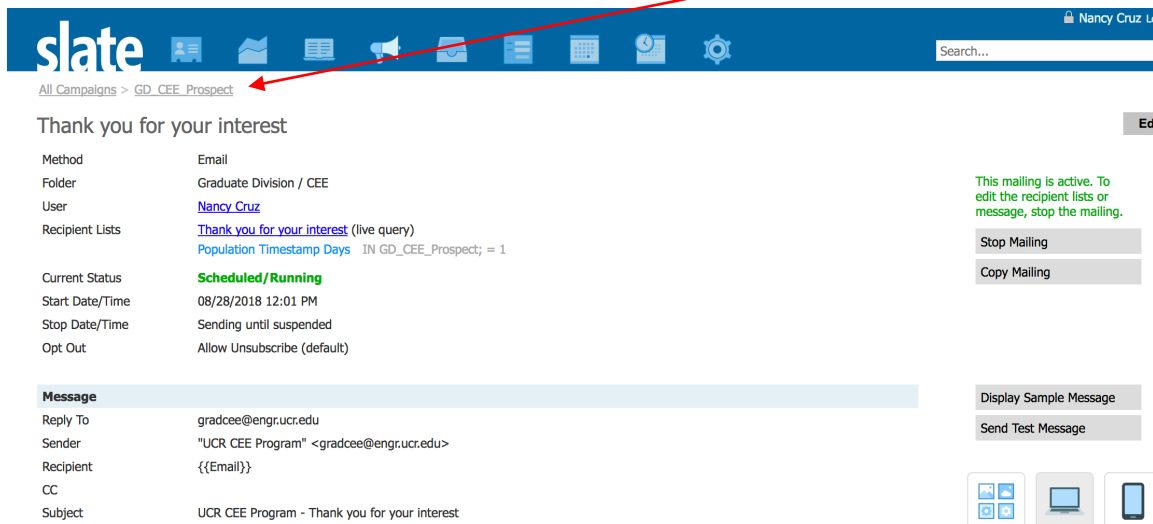
Copy Mailing

Display Sample Message

Send Test Message



You can also confirm your communication is live by going back to your programs Campaign screen. Click on your program's folder to go back:



slate Nancy Cruz Lo

All Campaigns > [GD_CEE_Prospect](#)

Thank you for your interest

Method Email
Folder Graduate Division / CEE
User [Nancy Cruz](#)
Recipient Lists [Thank you for your interest](#) (live query)
[Population Timestamp Days](#) IN GD_CEE_Prospect; = 1
Current Status **Scheduled/Running**
Start Date/Time 08/28/2018 12:01 PM
Stop Date/Time Sending until suspended
Opt Out Allow Unsubscribe (default)

Message

Reply To gradcee@engr.ucr.edu
Sender "UCR CEE Program" <gradcee@engr.ucr.edu>
Recipient {{Email}}
CC
Subject UCR CEE Program - Thank you for your interest

Edit


This mailing is active. To edit the recipient lists or message, stop the mailing.

Stop Mailing

Copy Mailing

Display Sample Message

Send Test Message



The communication will now show a green Running/Ongoing status:

Mailings

+1 Mon, Tue, Wed, Thu, Fri, Sat, Sun; Morning	Thank you for your interest UCR CEE Program - Thank you for your interest Population Timestamp Days IN GD_CEE_Prospect; = 1	Running/Ongoing Preview
+3	Email from Grad Div Dean UCR CEE - Welcome from the Dean Population Timestamp Days IN GD_CEE_Prospect; = 3	In Progress Preview
+10	Funding Opportunities UCR CEE - Funding Opportunitites Population Timestamp Days IN GD_CEE_Prospect; = 10	In Progress Preview
+24	Research tracks UCR CEE - Research Tracks Population Timestamp Days IN GD_CEE_Prospect; = 24	In Progress Preview

Once the communication is live, you cannot make edits unless you stop the communication from going out. Click the Stop Mailing link on the right:

All Campaigns > GD_CEE_Prospect

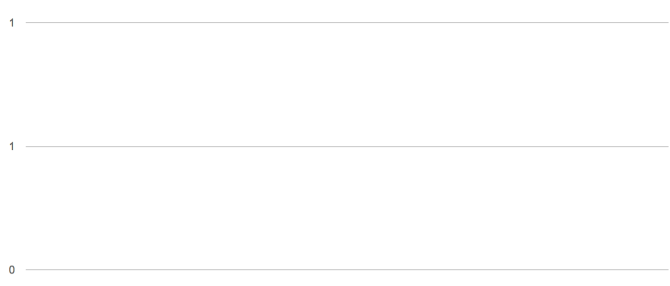
Thank you for your interest [Edit](#)

Method: Email
 Folder: Graduate Division / CEE
 User: [Nancy Cruz](#)
 Recipient Lists: [Thank you for your interest](#) (live query)
 Population Timestamp Days IN GD_CEE_Prospect; = 1
 Current Status: **Scheduled/Running**
 Start Date/Time: 08/28/2018 12:01 PM
 Stop Date/Time: Sending until suspended
 Opt Out: Allow Unsubscribe (default)

This mailing is active. To edit the recipient lists or message, stop the mailing.

[Stop Mailing](#)
[Copy Mailing](#)

[Opens/Clicks](#) [Browser/Location](#)



Sent	0
Delivered	0 NaN
Opens	0
Clicks	0
Unique Opens	0 NaN
Unique Clicks	0 NaN
Bounces	0

Click the red Stop Mailing link:

Send Mailing

Recipient Lists Thank you for your interest (live)

Batch Size (optional) Send max messages and suspend.

Review This message is ready for review.

Outbox Send to outbox and do not deliver automatically.

Ongoing Continue running mailing indefinitely.

Start Date/Time Time: Eastern Time

Stop Date/Time Time: Eastern Time

Weekdays Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

Delivery Window Overnight: 2:00am–4:00am
 Morning: 10:00am–12:00pm
 Midday: 12:00pm–2:00pm
 Afternoon: 2:00pm–4:00pm
 Evening: 8:00pm–10:00pm

Deduping

Delay Delivery Delay delivery until a specific time.

Stop Mailing Cancel

Confirm that you want to stop the mailing:

To confirm that you want to STOP this mailing, type the word STOP into the box below.

Cancel OK

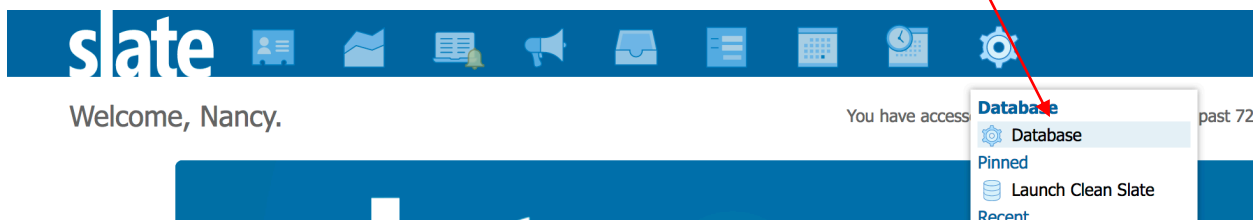
You should now be able to edit the communication.

BCC Line on Emails:

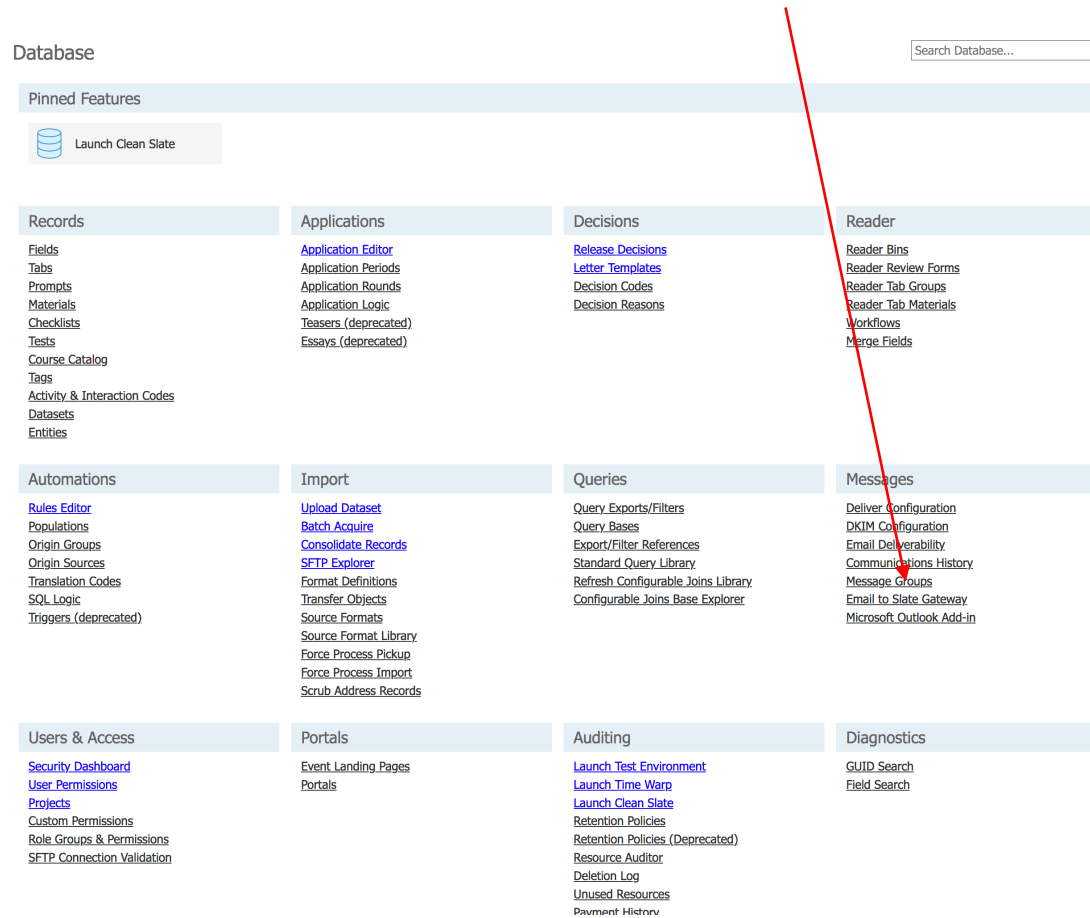
Adding a unique Slate address to the BCC line of an email (outside of Slate), will allow all communication with that contact to be documented in Slate. You can include the Slate address to the BCC line of any email you send, whether the contact has a Slate record or not. Slate has the ability to incorporate previous interactions into a contact's profile as soon as they become a prospect or applicant.

To get your unique Slate BCC address:

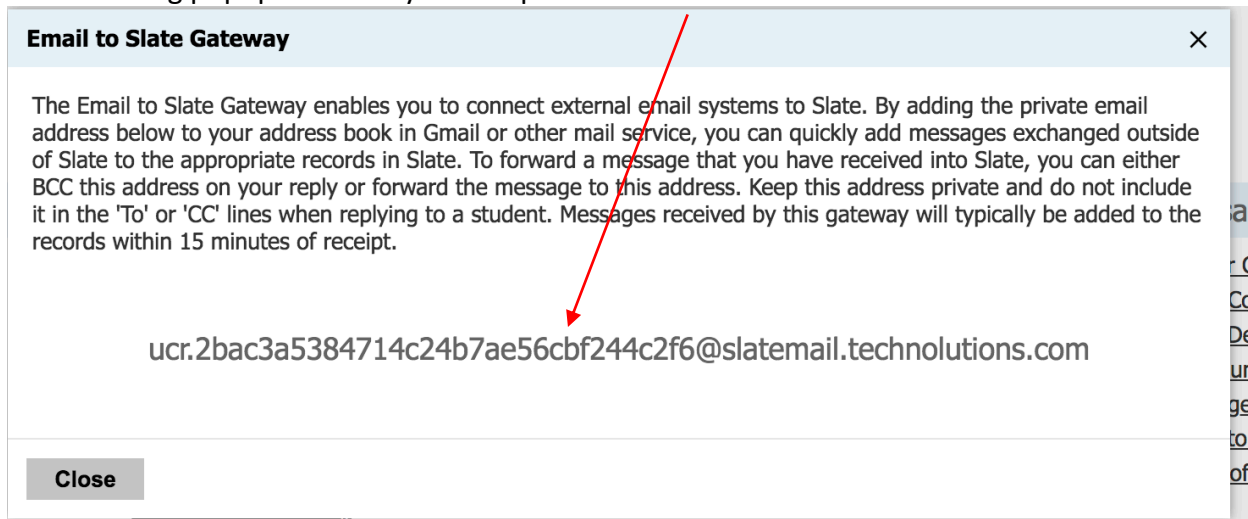
From the Slate dashboard, hover over the gear icon and click on "Database":



Under the "Messages" section, click on "Email to Slate Gateway".



The following popup will have your unique Slate BCC address:



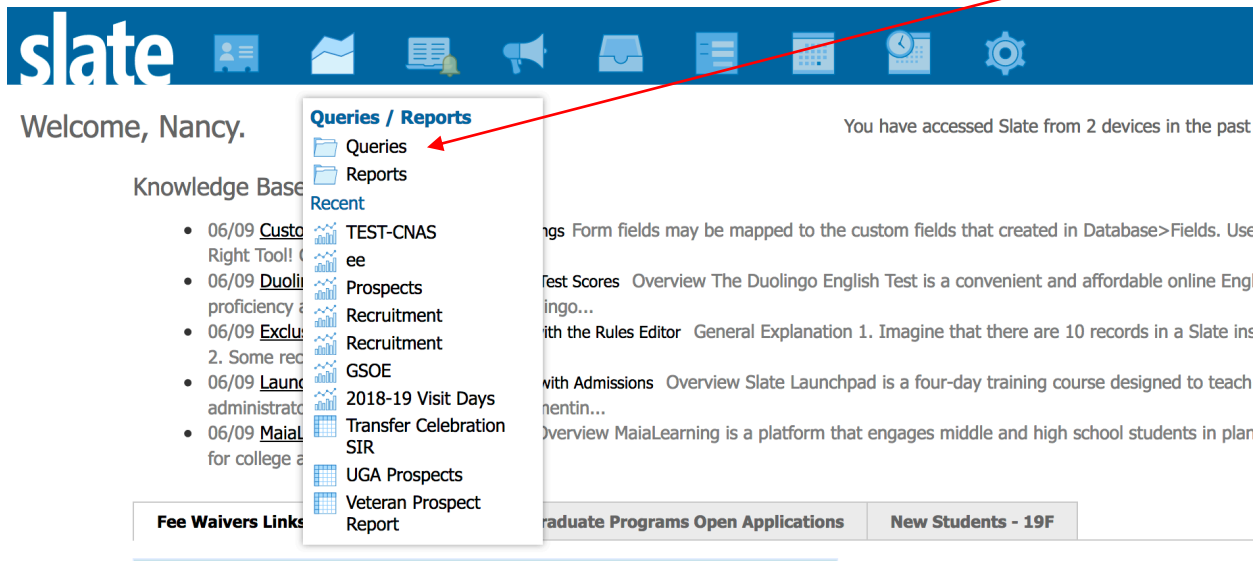
Copy and paste this address into the BCC field of your email. **Tip: add this email address to your contacts and name it "Slate" to easily add it to the BCC line.

Queries

The query tool is used to create a list of student records that meet specific criteria.

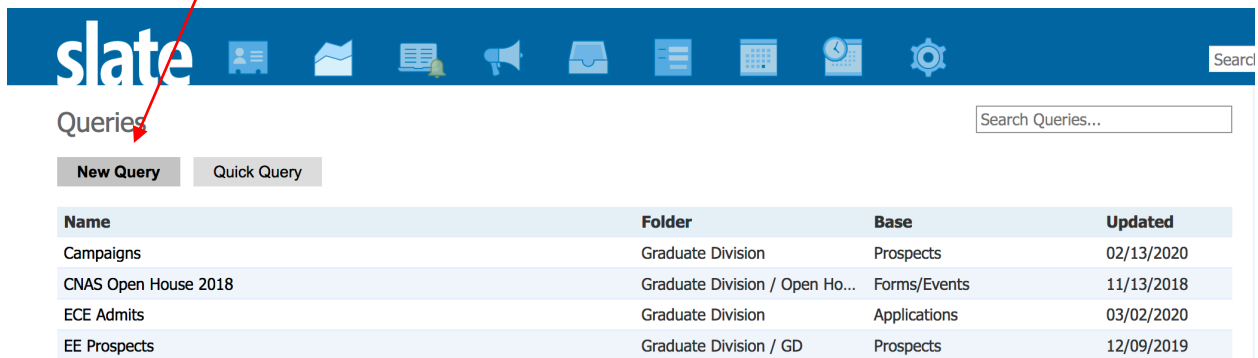
To Build a Query:

To build a Query, click on the Queries tab from the Slate dashboard and click on Queries:



The screenshot shows the Slate dashboard interface. At the top, there is a blue navigation bar with the 'slate' logo and several icons. Below the navigation bar, the main content area is visible. On the left, there is a 'Welcome, Nancy.' message and a 'Knowledge Base' section with a list of articles. In the center, a dropdown menu is open, titled 'Queries / Reports'. The menu contains two main categories: 'Queries' and 'Reports'. Under 'Queries', there is a 'Recent' section with a list of items: TEST-CNAS, Prospects, Recruitment, GSOE, 2018-19 Visit Days, Transfer Celebration SIR, UGA Prospects, and Veteran Prospect Report. A red arrow points from the text above to the 'Queries' option in the dropdown menu. On the right side of the dashboard, there is a notification: 'You have accessed Slate from 2 devices in the past'. Below the notification, there are several article snippets. At the bottom of the dashboard, there are two buttons: 'Graduate Programs Open Applications' and 'New Students - 19F'.

Click on “New Query” to build a query you will want to save.



The screenshot shows the 'Queries' page in the Slate dashboard. At the top, there is a blue navigation bar with the 'slate' logo and several icons. Below the navigation bar, the main content area is visible. On the left, there is a 'Queries' section with a 'New Query' button and a 'Quick Query' button. On the right, there is a search bar labeled 'Search Queries...'. Below the search bar, there is a table with the following columns: Name, Folder, Base, and Updated. The table contains four rows of data:

Name	Folder	Base	Updated
Campaigns	Graduate Division	Prospects	02/13/2020
CNAS Open House 2018	Graduate Division / Open Ho...	Forms/Events	11/13/2018
ECE Admits	Graduate Division	Applications	03/02/2020
EE Prospects	Graduate Division / GD	Prospects	12/09/2019

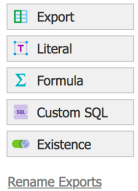
1. Name your query
2. Be sure to select the appropriate folder for your query. The first folder should always be “Graduate Division”. You can select your program folder or create one if it doesn’t exist.
3. Base: Choose the base of your population.
Prospect-this will include all student records. Each student record will appear as a single row in the query results.
Applications-all applications will be considered, regardless of the status (saved, submitted, etc.). Records with multiple applications will appear multiple times in the query results.
4. Click Save to begin your query.

New Query ×

Name	<input type="text" value="ECE-Saved"/>
User	<input type="text" value="Cruz, Nancy"/>
Realm	<input type="text"/>
Sharing	<input type="checkbox"/> Share query with other users with the query and query base permissions
Folder	<input type="text" value="Graduate Division"/> / <input type="text" value="GD"/>
Type	<input type="text" value="Local"/>
Base	<input type="text" value="Applications"/>

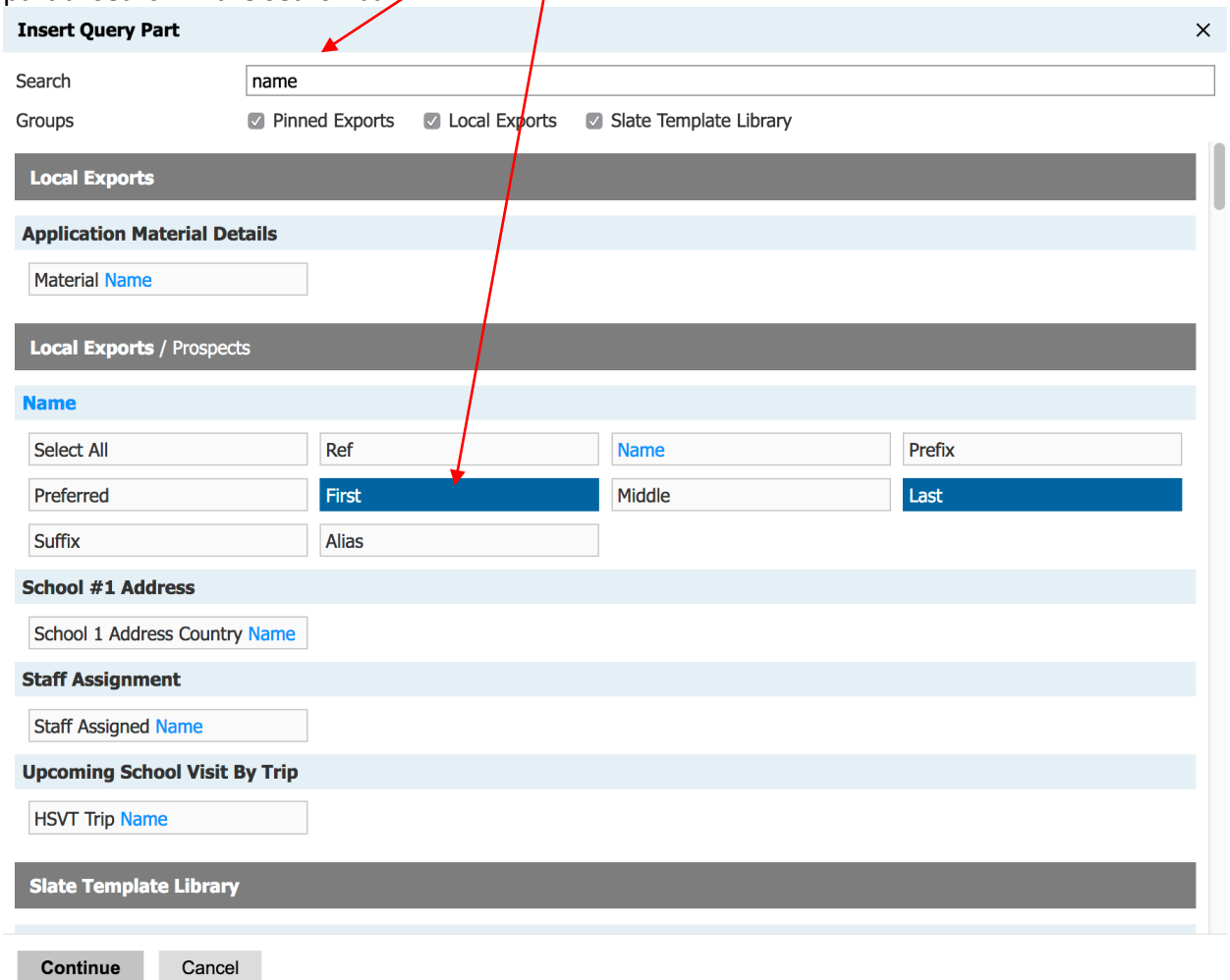
5. Click the Export button to begin selecting what information you want to query. These selections will appear as columns in your query results.

Exports



A vertical menu with five options: 'Export' (with a grid icon), 'Literal' (with a text icon), 'Formula' (with a sigma icon), 'Custom SQL' (with a code icon), and 'Existence' (with a checkmark icon). Below the menu is a 'Rename Exports' link.

6. You can select as many exports as you like. Most common used are first name, last name, email and program. You can look through the list and click the options or do a partial search in the search bar.



Insert Query Part [Close]

Search:

Groups: Pinned Exports Local Exports Slate Template Library

Local Exports

Application Material Details

Material

Local Exports / Prospects

Name

Select All	Ref	Name	Prefix
Preferred	First	Middle	Last
Suffix	Alias		

School #1 Address

School 1 Address Country

Staff Assignment

Staff Assigned

Upcoming School Visit By Trip

HSVT Trip

Slate Template Library

- You can add more exports by clicking on the Export button again. You can rearrange the exports by clicking and dragging them to the desired location. The columns of your report will appear in the order of the exports.

Exports

First
Last
Email
Program

Export
Literal
Formula
Custom SQL
Existence

Rename Exports

- Click on Filters to begin building the population of your query.

Filters Matching Rows: 149,883

Filter
Custom SQL
OR
NOT
(
)

- The first filter should always be “Student Level (person)”. This will remove any undergraduate records from your query.

Insert Query Part

Search

Groups Pinned Filters Local Filters Slate Template Library

Slate Template Library

Slate Template Library / Prospects

Continue **Cancel**

10. Click Continue and select the student level. “Graduate” will only include those with a graduate application in Slate/GradSIS. “Grad Prospect” will only include prospect students, without an application. You can select one or both options.

Edit Part ✕

Status	<input type="text" value="Active"/>
Name	Student Level (Person)
Source	Library Filter
Matching Rows	22,204
Student Level (Person)	<div style="border: 1px solid #ccc; padding: 5px;"> <input type="text" value="IN"/> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="background-color: #f4a460; padding: 2px;">Grad Prospect</div> <div style="background-color: #f4a460; padding: 2px;">Graduate</div> <div style="padding: 2px;">Medical</div> <div style="padding: 2px;">Undergrad Prospect</div> <div style="padding: 2px;">Undergraduate</div> </div> </div>

11. For this example, we will be looking for all Electrical Engineering contacts who have a saved application. To accomplish this, we will need to filter for application status and program name.

Filters Check Logic Matching Rows: 341

Student Level (Person) IN Graduate	<input type="button" value="Filter"/> <input type="button" value="Custom SQL"/> <input type="button" value="OR"/> <input type="button" value="NOT"/> <input type="button" value("("=""/> <input type="button" value=")"/>
Application Status IN Saved	
Program Electrical Engineering	

12. Other options when creating a query:

a. Edit Properties:

The screenshot displays the 'Edit Query' interface. At the top, there is a table of properties:

Folder	Graduate Division / GD
User	Nancy Cruz
Base	Applications
Execution Mode	Retrieve all records each time query is run

Below this is an 'Exports' section with input fields for 'First', 'Last', 'Email', and 'Program'. To the right of these fields is a vertical menu with options: 'Export', 'Literal', 'Formula', 'Custom SQL', 'Existence', and 'Rename Exports'. Below the exports is a 'Filters' section showing 'Matching Rows: 341' and three filter rules:

- Student Level (Person) IN Graduate
- Application Status IN Saved
- Program IN Electrical Engineering

At the bottom right, there is another vertical menu with options: 'Filter', 'Custom SQL', 'OR', 'NOT', '(', and ')'. A red arrow points from the 'Edit Properties' text to the 'Edit Properties' button in the right-hand menu.

13. Saved queries can be configured to limit records based on a number of factors. Click Edit Properties to set some of those limitations. Only use “Limit Rows” if you only want a specific number of records. **Not used often. For Executive Options, select “**Retrieve all records each time query is run**” when you want all records that meet the criteria to be included in your query, each time the query is run. “**Retrieve all records and save recent result history**” will give you all records that meet the query criteria each time the query is run. Each time the query is run, the history will be saved so you can see the records that met the query criteria previously. “**Retrieve only the new records since query was last run**” will give you new records that were not included in the previous query results. The history of the query results is also saved.

Edit Properties

Limit Rows

Execution Options Retrieve all records each time query is run
 Retrieve all records and save recent result history
 Retrieve only the new records since query was last run

Queue

Primary Key a.[id]

Secondary Key

Warning! Secondary keys should be specified only under special circumstances. They introduce extreme risks for mailings if used inappropriately.

Save **Cancel**

14. Click on “Sharing Permissions if you would like to have other Slate users view and/or edit your queries. Click on “Add Grantee”.

Edit Permissions ×

Grantee	Permissions	Status
Add Grantee		

Close

15. Type should be set to “User”. Under the “User” search bar, type the name of the Slate user you would like to share the query with. For “Permissions”, select the appropriate permissions setting. Users you share a query with can have permission to “Display/Run Query”, “Edit Query” or both. Edit permission requires both permissions to be selected.

Edit Grantee ✕

Active

Type

User

Permissions Display/Run Query
 Edit Query

16. **Schedule Export**-typically used when exporting data from Slate to an external system. Not typically used.
17. **Preview results**-used to preview results of your query.
18. **Save a Copy**-Allows you to save a copy of your query. Queries can be saved, re-named and edited if you want to build a new, similar query without starting over.

19. Once you have all your criteria selected, you are ready to run the query. Click on the name of your query in the upper left-hand corner of Slate.

All Queries > ECE-Saved

Edit Query

Folder: Graduate Division / GD
 User: [Nancy Cruz](#)
 Base: Applications
 Execution Mode: Retrieve all records each time query is run

Exports

First
 Last
 Email
 Program

Filters Check Logic Matching Rows: 341

Student Level (Person) IN Graduate
 Application Status IN Saved
 Program IN Electrical Engineering

Run Query

20. Click on “Run Query”

All Queries

ECE-Saved

Folder: Graduate Division / GD
 User: [Nancy Cruz](#)
 Base: Applications
 Execution Mode: Retrieve all records each time query is run
 Filters: [Student Level \(Person\)](#) IN Graduate
 [Application Status](#) IN Saved
 [Program](#) IN Electrical Engineering
 Matching Rows: 341

Run Query

The next screen will be your query output. You have several options with the query. Most common output options to use are “Excel Spreadsheet” and “Deliver Mailing”.

The screenshot shows a software interface with a table of data and an 'Export Destinations' dialog box. The table has columns for 'Output', 'First', and 'Pro'. The 'Export Destinations' dialog box is open, showing a list of options. A red arrow points from the text above to the 'Deliver Mailing' option in the list.

Output	First	Pro
	Mohammad Hossein	Elec
	Neman	Elec
	Vvvv	Elec
	Kamran	Elec
	Ahraar Shareef Muqsit	Elec
	Mohammed	Elec
	Olutola	Elec
	Md Ibrahim Ibne	Elec
Zahraalsadat	Alavizadeh	Elec

Export Destinations

- Excel Spreadsheet
- Deliver Mailing
- Portal
- Report Builder
- Comma-Delimited CSV File
- Tab-Delimited File
- PDF Document Export
- Decision Letter Export to Word
- PDF Report
- HTML Report
- Mail Merge Word Document

Batch Management

- Activity
- Bin
- Checklist
- Decision
- Field
- Generate PIN
- Interaction

Choosing “Deliver Mailing” will add your query to an email that can be sent out. Email should be created and saved before attempting to add the query to a deliver mailing. This option is meant to be used with one-off emails and not with a communication in your campaign.

Events

Creating a new event:

If your event is a recurring event, creating a template will save time.

To create a new template:

Login to Slate: <https://connect.ucr.edu/manage>

Click on the Events tab and click “Events”:

Welcome, Nancy. You have accessed Slate from 1 device in the past 72 hours. [Details](#) [Your Profile](#) [Supervised Login](#)

slate INNOVATION SUMMIT
CHICAGO · 2019

Summit is approaching. Register at SlateSummit.org to join 3,000 members of the Slate family in 7d 19h 55m 9s.

Click on New Template:

Events

New Event **New Template**

May 2019 month week day < > today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
	High School/Communi... Riverside, CA #1 FULL (62)	High School/Communi... Riverside, CA #1 (44)	High School/Communi... Riverside, CA #5 (121)	4th Annual Ethnic St... Fullerton, CA #4	High School/Communi... Riverside, CA #7 FULL (324)	
	Individuals/Families Riverside, CA #112 (83)	Individuals/Families Riverside, CA #58 (46)	Individuals/Families Riverside, CA #28 (22)	East Los Angeles Col... Monterey Park, CA	Individuals/Families Riverside, CA #96 (64)	
	Santa Monica Colleg... Santa Monica, CA	9:00am San Bernardi... Sn Bernrdno, CA	8:30am Admitted Stu... Los Altos Hls, CA	Elementary/Middle S... Riverside, CA #5 FULL (412)	9:00am Engineering ... Riverside, CA #5 (3)	

Fill out the New Template information:

New Template [X]

Details | Location | Description | Limits | Rescheduling | Notes

Template Name: TEP-Info Sessions

Internal Name (optional):

Status: Active

Timezone: Autodetect from Location

Privacy: Do not display on public landing pages.

User: Cruz, Nancy

Admin Notify Email: nancy.cruz@ucr.edu

Save **Cancel**

Freshman I... de, CA | 11:00am San Berardi... Sn Bernrdno, CA | 11:00am Freshman I... Riverside, CA | 10:00am Residence ... Riverside, CA | 11:00am High School... Riverside, CA

Template Name is required.

The default for status is “Active”. If you do not want your template to be active immediately, change the status to “Inactive”. If you do make the template inactive, you will need to return to this screen to change the status once the template is ready to be used.

If you would like to receive an email each time someone signs up for your event, enter your email address in the “Admin Notify Email” section. Separate emails with a comma.

Click Save.

Your template has been created. Next step is to add the registration form for your event. Click “Edit Form”:

All Events

TEP-Info Sessions

[Edit](#)

Folder: Templates
User: [Nancy Cruz](#)
Status: CONFIRMED
Documents: [Edit Documents](#)

Upcoming Instances

Date/Time ▼	Description	Category	Status
-------------	-------------	----------	--------

Past Instances

Date/Time ▲	Description	Category	Status
-------------	-------------	----------	--------

Technolutions Slate (University of California, Riverside) mala1 / luna / ucr

You will get a basic Slate form. You can add and remove fields by using the options on the right side of the screen:

All Events > TEP-Info Sessions

Edit Form

Email Address

First Name

Middle Name

Last Name

Birthdate

Mailing Address
Country:

Street

City

State

Postal Code

Sharing Permissions

- Edit Properties
- Edit Conditions
- Edit Rules
- Edit Scripts
- Show Form Logic
- Copy Form
- Sharing Permissions

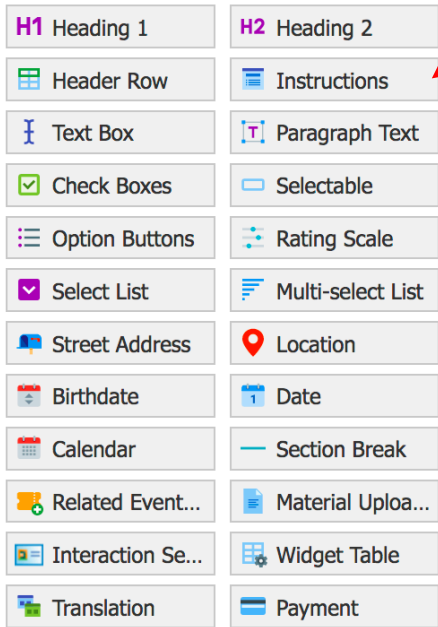
Widget Palette:

- H1 Heading 1
- H2 Heading 2
- Header Row
- Instructions
- Text Box
- Paragraph Text
- Check Boxes
- Selectable
- Option Buttons
- Rating Scale
- Select List
- Multi-select List
- Street Address
- Location
- Birthdate
- Date
- Calendar
- Section Break
- Related Event...
- Material Uploa...
- Interaction Se...
- Widget Table
- Translation
- Payment

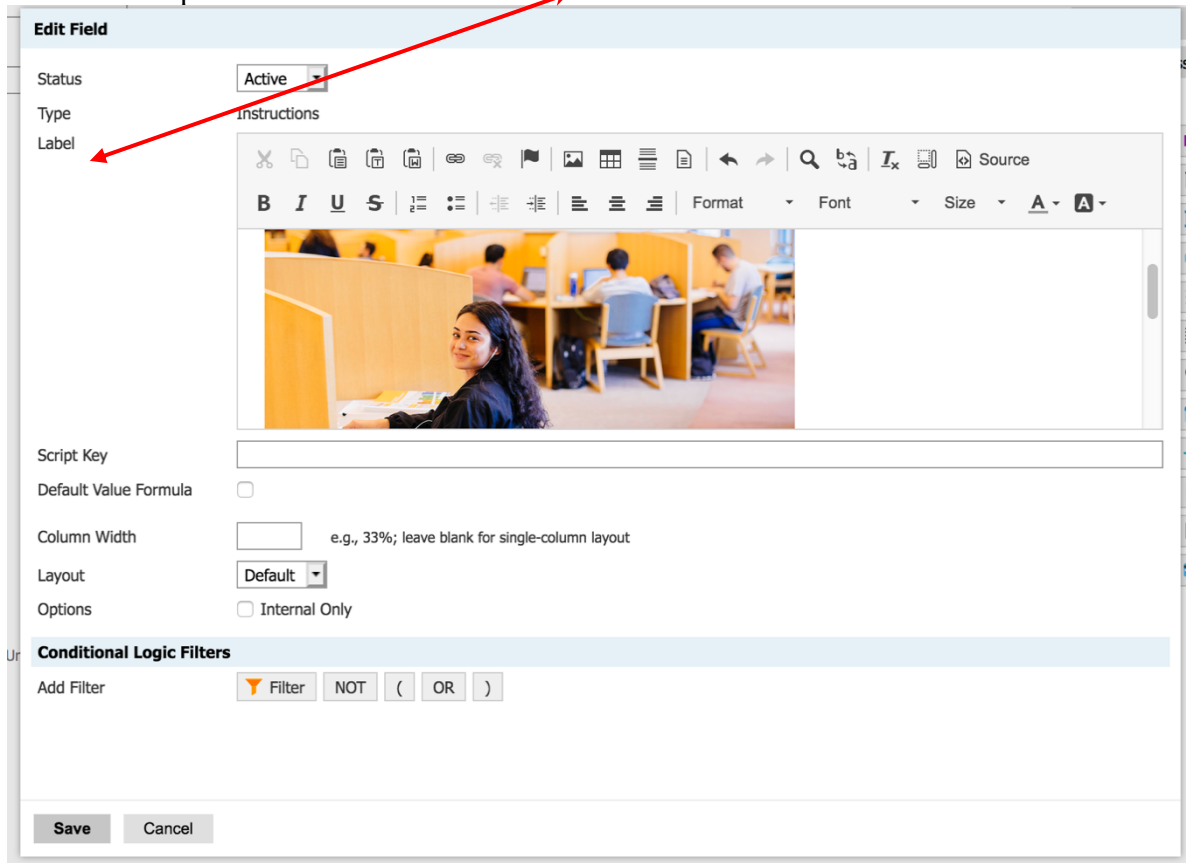
Technolutions Slate (University of California, Riverside) mala1 / luna / ucr

Do not remove the Email Address, First Name and Last Name fields. These are system fields which will create a person record for all who fill out the form.

To add a picture and instructions, click on Instructions:



Add text and pictures in the Label text box:



Click Save when done.

Continue adding desired fields. Be sure to mark fields as “Required”. If not marked as required, the form may be submitted with missing information.

Groups

- Social Media
- UCR Website
- UCR Faculty/Staff
- UCR Student
- UCR Alumni
- On-Campus Flyer
- Google Search
- Other

Default Value Formula

Default Value(s)

- Social Media
- UCR Website
- UCR Faculty/Staff
- UCR Student
- UCR Alumni

Maximum Selectable

Column Width e.g., 33%; leave blank for single-column layout

Layout

Options

- Required
- Internal Only
- Read Only
- Hidden (accessible through script)
- Disabled / Display but do not store

Conditional Logic Filters

Add Filter

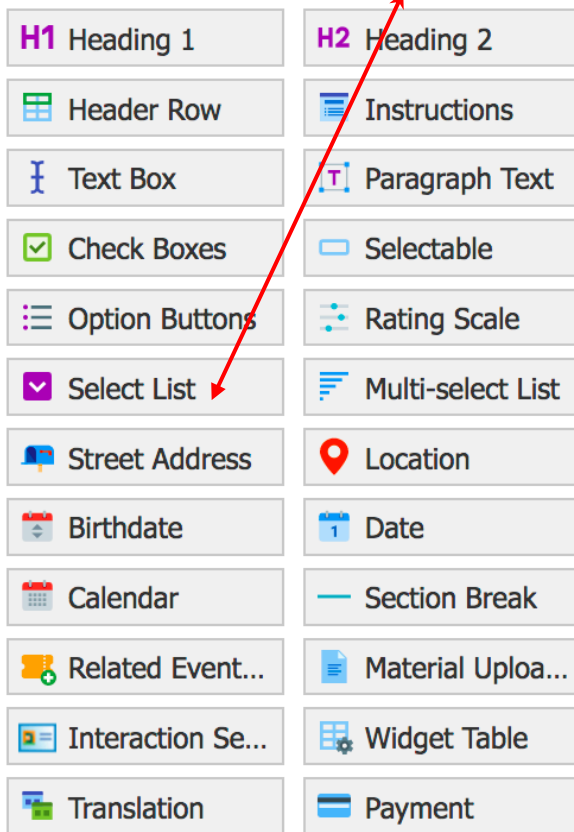
If you would like the person filling out the form to be added into a Deliver Campaign, the following two fields must be included in your form:

Program of Interest:

Student level

To add the Program of Interest field:

Drag the Select List field onto your form:



The following fields must be filled out:

Label: Enter the name of the field. This will be visible to the person filling out the form.

System Field: Select “Fields” from the drop down menu:

The image shows a form configuration interface with the following fields and controls:

- Status:** A dropdown menu currently set to "Active".
- Type:** A dropdown menu currently set to "Select List".
- Label:** A text input field containing "Program of Interest:". Below it is a checkbox labeled "Hide Label".
- Placeholder Text:** An empty text input field.
- System Field:** A dropdown menu that is open, showing a list of options. A red arrow points from the text "System Field:" to the "Fields" option in the list. The options in the list are: Record, Address, Device, Fields, Interaction, Interests, Jobs, Project Task, Project Task Log, Relationship, Relationship Job, Relationship School, School Courses, Schools, Sport, Tags, Test Scores, Special Form Fields, and System.
- Export Key:** An empty text input field.
- Data Type:** An empty text input field.
- Size:** An empty text input field.
- Prompts:** An empty text input field.
- Default Value Formula:** An empty text input field.
- Default Value:** An empty text input field.

At the bottom of the form, there are two buttons: "Save" and "Cancel".

Select “Other – Degree Objective” on the next drop down menu:

Status

Type

Label
 Hide Label

Placeholder Text

System Field

Export Key

Data Type

Size Expanded width

Prompts

Default Value Formula

Default Value

Column Width e.g., 33%; leave blank for single-column layout

Other - Academic Interest
 Other - Area of Research Interest
 Other - Area of Specialization
 Other - Athlete
 Other - Birth Country (Banner)
 Other - California Residency
 Other - Class Level
 Other - Country of Birth
 Other - Country of Citizenship
 Other - Current Grade Level
 Other - Deceased
 Other - Degree Objective
 Other - Degree Objective - GSOE
 Other - Division
 Other - Entry Term
 Other - Ethnicity
 Other - Ethnicity(U)
 Other - Exam Status
 Other - Exam Type
 Other - First Generation

Export Key will automatically pre-populate. Do not change this field.

Prompts: This field will pre-populate with all the degree objectives. If you would like to change this, check “Override system prompts”.

Export Key

Data Type

Size Expanded width

Prompts

Master of Arts
Master of Education
Teacher Education Program
Doctor of Philosophy

Override system prompts Connect to system pro

Default Value Formula

Default Value

Column Width e.g., 33%; leave blank for single-column layout

Layout

Options Required
 Internal Only
 Read Only
 Hidden (accessible through script)
 Disabled / Display but do not store

Conditional Logic Filters

Clicking “Override system prompts” will allow you to remove the degree objectives you do not want on your form. It will also add a bunch of numbers and letters after the name. Do not remove this tag.

Edit Field

Export Key: sys:field:gd_degree_objective_gsoe

Data Type: Text/Unspecified

Size: Expanded width

Prompts: Teacher Education Program^96aadaa0-05e1-4f63-9227-ab7a96c23aef

Override system prompts

Default Value Formula:

Default Value:

Column Width: e.g., 33%; leave blank for single-column layout

Layout: Default

Options: Required
 Internal Only
 Read Only
 Hidden (accessible through script)
 Disabled / Display but do not store

Conditional Logic Filters

Add Filter: ()

Click on the “Internal Only” option:

Default Value:

Column Width: e.g., 33%; leave blank for single-column

Layout:

Options: Required
 Internal Only
 Read Only
 Hidden (accessible through script)
 Disabled / Display but do not store

Example of how this field should look:

Edit Field ×

Status

Type

Label ↔
 Hide Label

Placeholder Text

System Field ↔

Unsafe Override Enable unsafe import to this destination

Export Key

Data Type

Size Expanded width

Prompts ↔
 Override system prompts [Edit Prompt Conditions](#)

Default Value Formula

Default Value ↔

Column Width e.g., 33%; leave blank for single-column layout

Layout

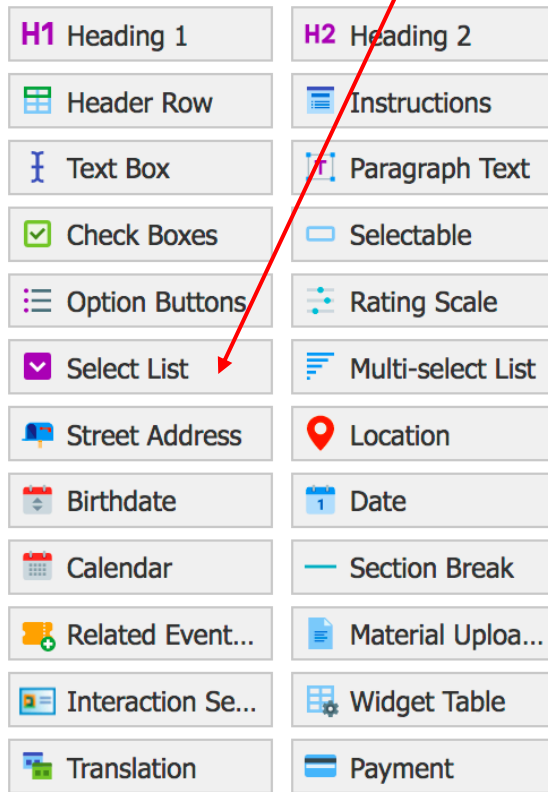
Options ↔ Required
 Internal Only
 Read Only
 Hidden (accessible through script)
 Disabled / Display but do not store

Conditional Logic Filters

Add Filter

Click Save when you are done.

To add the Student Level field:
Drag the Select List field onto your form:



Label: Enter the name of the field. This will be visible to the person filling out the form.

System Field: Select “Fields” from the drop down menu:

A screenshot of a form configuration page. The left sidebar contains labels for various fields: Status, Type, Label, Placeholder Text, System Field, Export Key, Data Type, Size, Prompts, Default Value Formula, and Default Value. The main area shows a form with a 'Status' dropdown set to 'Active', a 'Type' dropdown set to 'Select List', and a 'Label' field containing 'Program of Interest:'. Below the label is a 'Hide Label' checkbox. A dropdown menu is open over the 'System Field' field, listing various options. A red arrow points from the text 'System Field:' to the 'Fields' option in the dropdown menu. At the bottom, there are 'Save' and 'Cancel' buttons.

Select “Other – Student Level”

A screenshot of a form configuration page, similar to the one above. The 'Status' dropdown is 'Active', the 'Type' dropdown is 'Select List', and the 'Label' field contains 'Student Level'. The 'System Field' dropdown is set to 'Fields'. A dropdown menu is open over the 'System Field' field, listing various options. A red arrow points from the text 'Select “Other – Student Level”' to the 'Other - Student Level' option in the dropdown menu. At the bottom, there are 'Save' and 'Cancel' buttons.

The Export Key will pre-populate as well as the Prompts. Do not change the Export Key:

Edit Field

Unsafe Override Enable unsafe import to this destination

Null Handling Enable custom null handling

Export Key

Data Type

Size Expanded width

Prompts

- Grad Prospect
- Graduate
- Medical
- Undergrad Prospect
- Undergraduate

Override system prompts Connect to system prompts

Default Value Formula

Default Value

Column Width e.g., 33%; leave blank for single-column layout

Layout

Options

- Required
- Internal Only
- Read Only
- Hidden (accessible through script)
- Disabled / Display but do not store

Conditional Logic Filters

Save **Cancel**

Click on “Override System Prompts”. This will allow you to remove the student levels not needed:

Export Key

Data Type

Size Expanded width

Prompts

Override system prompts

Default Value Formula

Default Value

Column Width e.g., 33%; leave blank for single-column

Layout

Options Required
 Internal Only
 Read Only
 Hidden (accessible through script)
 Disabled / Display but do not store

Conditional Logic Filters

Add Filter

Remove all student levels except “Grad Prospect”:

Edit Field

Export Key

Data Type

Size Expanded width

Prompts

Override system prompts

Default Value Formula

Default Value

Column Width e.g., 33%; leave blank for single-column layout

Layout

Options

- Required
- Internal Only
- Read Only
- Hidden (accessible through script)
- Disabled / Display but do not store

Conditional Logic Filters

Add Filter

Select Default Value and set the field Options to “Hidden”.

Click Save to make the changes to your form.

Once your form is completed, you are ready to add events to this template.

To add an event:
Click on the Events tab and click “Events”:

Welcome, Nancy. You have accessed Slate from 1 device in the past 72 hours. [Details](#) [Your Profile](#) [Supervised Login](#)

slate INNOVATION SUMMIT
CHICAGO · 2019

Summit is approaching. Register at SlateSummit.org to join 3,000 members of the Slate family in 7d 19h 55m 9s.

Click on New Event:

slate Search

Events Search Events...

New Event New Template

May 2019 month week day < > today

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	1	2	3	4
	High School/Communi... Riverside, CA #1 FULL (52)	High School/Communi... Riverside, CA #1 (44)	High School/Communi... Riverside, CA #5 (121)	4th Annual Ethnic St... Fullerton, CA #4	High School/Communi... Riverside, CA #7 FULL (324)	
	Individuals/Families Riverside, CA #112 (83)	Individuals/Families Riverside, CA #58 (46)	Individuals/Families Riverside, CA #28 (22)	East Los Angeles Col... Monterey Park, CA	Individuals/Families Riverside, CA #96 (64)	
	Santa Monica Colleg... Santa Monica, CA	9:00am San Bernardi... Sn Bernrdo, CA	8:30am Admitted Stu... Los Altos Hls, CA	Elementary/Middle S... Riverside, CA #5 FULL (412)	9:00am Engineering ... Riverside, CA #5 (3)	

Fill out the Page Title. This will be visible to your registrants.
Click on Template and pick the template created for this event:

New Event ✕

Details	Location	Description	Limits	Notes
Page Title	<input type="text" value="TEP-Information Session"/>			
Internal Name (optional)	<input type="text"/>			
Template	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> High School/Community College Recreation Center Tour Individuals/Families MATH Preview Day Template Online Event Recreation Center Tour Residence Hall Tour Teacher Education Program Info Session Teacher Education Program Webinar Info Session TEP-Info Sessions Test TEST 1- Ind. Lab Tour TEST 1- Ind. Residence Hall Tour test-esme-mapping groups CTO Transfer Information Session UA_Admit Celebration UA_Avid Classroom Visit UA_BSU UA_CBO UA_CCC Advising Appointment UA_Chaffey Initiative UA_Classroom Presentation </div>			
Folder				
Status				
Recurrence				
Date				
Deadline				
Timezone				
Privacy				
User				
Trip				
Admin Notify Email				
Related Records				

Save
Cancel

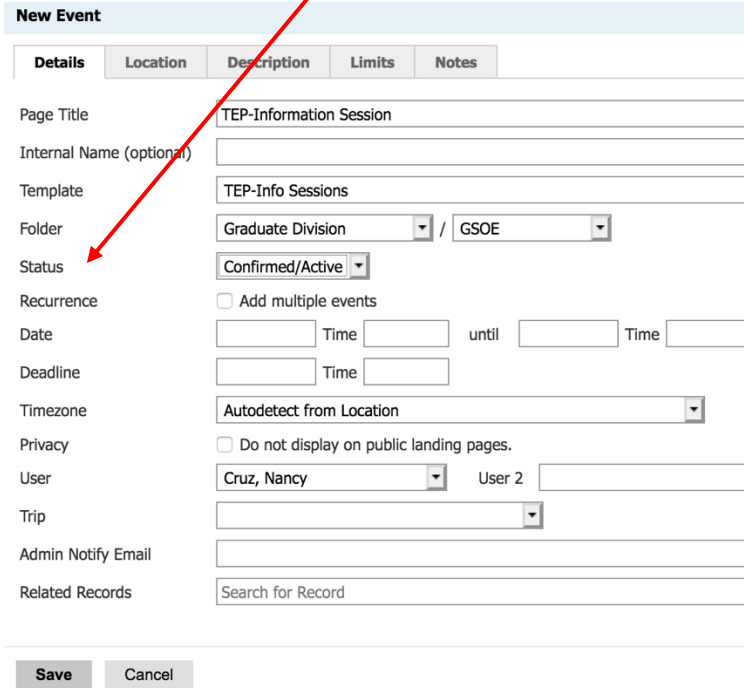
Choose a folder for your event:

Details ✕

Location	Description	Limits	Notes
Page Title	<input type="text" value="TEP-Information Session"/>		
Internal Name (optional)	<input type="text"/>		
Template	<input type="text" value="TEP-Info Sessions"/>		
Folder	<div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> ✓ Campus Tour CNAS CNAS Open House Graduate Admissions Graduate Division UA Campus Tours Office UA CTO Options UA CTO Visit Day Options UA Events UA FR Events UA Non-Res Events UA TR Events UA_Admit Celebrations UA_CEO UA_China Regional Events Other </div>		
Status			
Recurrence			
Date			
Deadline			
Timezone			
Privacy			
User			
Trip			
Admin Notify Email			
Related Records			

Save
Cancel

Change the Status to “Confirmed/Active”:



New Event

Details | Location | Description | Limits | Notes

Page Title: TEP-Information Session

Internal Name (optional):

Template: TEP-Info Sessions

Folder: Graduate Division / GSOE

Status: **Confirmed/Active**

Recurrence: Add multiple events

Date: [] Time [] until [] Time []

Deadline: [] Time []

Timezone: Autodetect from Location

Privacy: Do not display on public landing pages.

User: Cruz, Nancy / User 2 []

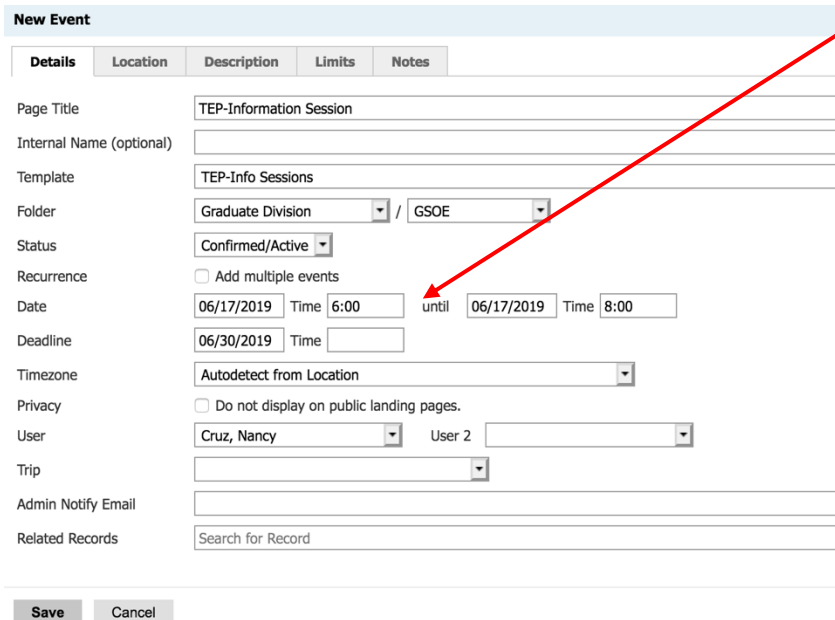
Trip: []

Admin Notify Email:

Related Records: Search for Record

Save **Cancel**

Fill out the Date of your event. Select a Deadline that is after your event. If no deadline date is set or if you set the deadline date the same as the event date, your form will become inactive on the date of the event. No one will be able to see or submit the form:



New Event

Details | Location | Description | Limits | Notes

Page Title: TEP-Information Session

Internal Name (optional):

Template: TEP-Info Sessions

Folder: Graduate Division / GSOE

Status: Confirmed/Active

Recurrence: Add multiple events

Date: 06/17/2019 Time 6:00 until 06/17/2019 Time 8:00

Deadline: 06/30/2019 Time []

Timezone: Autodetect from Location

Privacy: Do not display on public landing pages.

User: Cruz, Nancy / User 2 []

Trip: []

Admin Notify Email:

Related Records: Search for Record

Save **Cancel**

Admin Notify Email: Fill out if you would like to be notified when a form is submitted. Click Save.

Your event has been created:

[All Events](#)

TEP-Information Session

Date Monday, June 17, 2019 at 06:00 PM until 08:00 PM
Template [TEP-Info Sessions](#)
Folder Graduate Division / GSOE
User [Nancy Cruz](#)
Status CONFIRMED
URL <https://connect.ucr.edu/register/?id=9e1eb2f0-6b3b-41c9-b780-23cecadfd726> [Edit URL](#)
Documents [Edit Documents](#)

Registrants (0)

[Launch Check In](#)

[Launch Registration](#)

Registered **Cancelled** **All Registrants**

Registrant	Payment D
New Registration	

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Once your event is created, you should be able to see it in the event calendar view:

Click on the Events tab and the event tab will be visible:

Events

Search Events...

New Event New Template

June 2019

month week day < > today

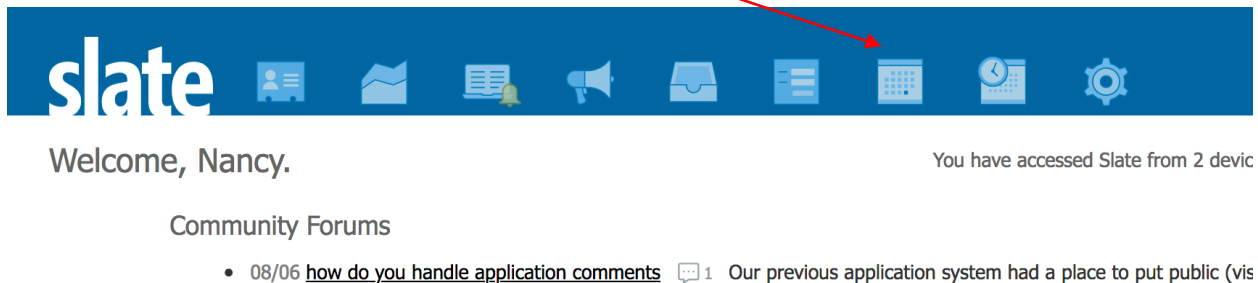
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
			3:30pm TEP Informa... Riverside, CA #23			
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
	6:00pm TEP-Informa... #15	10:00am Graduate O... #15	3:30pm TEP Informa... Riverside, CA #5			
23	24	25	26	27	28	29
			10:00am Workshop #3 #19 (12)			
30	1	2	3	4	5	6

Select “Graduate Division” link on the right side to view events only pertaining to Graduate Division. You can then select your department subfolder to only view your events.

Online Events and Webinars

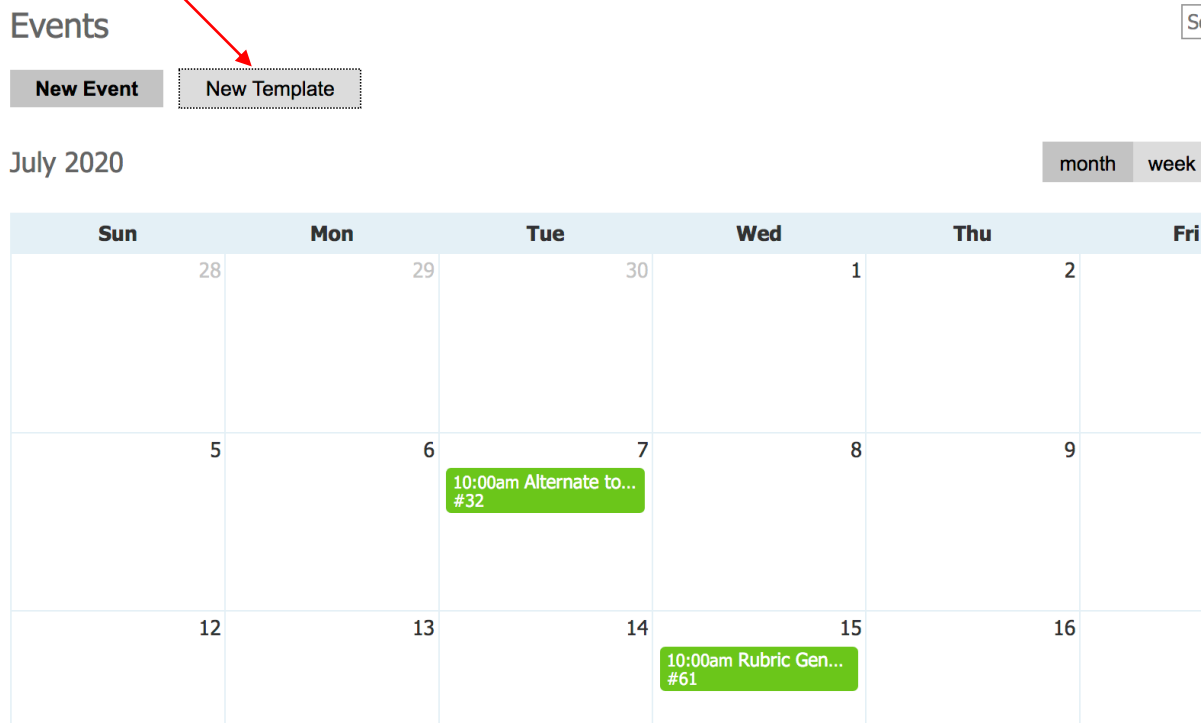
Slate provides the ability to host online events through its Share webinar platform. Its features include the ability to broadcast live streaming audio, video, and content from PowerPoint, PDF documents, URL video content or image files. Share also offers open and moderated chat functionality. There are no enforced limits on attendees who can register and attend an online event.

To create a Share webinar session, go to the Events tab in Slate:



Online events should be approached like any event. A template should be created if it is a recurring event. Creating an event template saves time and effort by allowing you to configure event components for an event type in a central location. All events that have an event template use that template's registration form and communications.

Click on "New Template":



Fill out the details of your event on the Details tab:

New Template [X]

Details | Location | Description | Limits | Rescheduling | Notes

Template Name: Open House 2020

Internal Name (optional):

Realm: [Dropdown]

Status: Active [Dropdown]

Time Zone: Autodetect from Location [Dropdown]

Privacy: Do not display on public landing pages.

User: Cruz, Nancy [Dropdown]

Admin Notify Email: nancy.cruz@ucr.edu

Save | Cancel

Click on the Location tab:

The screenshot shows a 'New Template' dialog box with a close button (X) in the top right corner. The 'Location' tab is selected and highlighted in blue. A red arrow points to this tab. The dialog contains the following fields:

- Online Event: A dropdown menu.
- Location Name: A text input field.
- Country: A dropdown menu with 'United States' selected.
- Street Address: A text input field.
- City: A text input field.
- State: A dropdown menu with 'Select State' selected.
- Postal Code: A text input field.
- Preserve Formatting: A checkbox that is unchecked.

At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Click on the Online Event drop down menu. Select "Host event using Share webinar Platform"

This screenshot shows the same 'New Template' dialog box, but with the 'Online Event' dropdown menu open. A red arrow points to the dropdown. The menu is open, showing two options:

- Host event using Share webinar platform (with a checkmark)
- Host event using external service

The other fields in the dialog are the same as in the previous screenshot. The 'Save' and 'Cancel' buttons are visible at the bottom.

The Share Template menu will be displayed and you will be able to select your desired functions:

Share Template ×

Template Name

Audio

Audio via Bridge

Video

Share Screen

Record Webinar

Chat

Chat Moderation

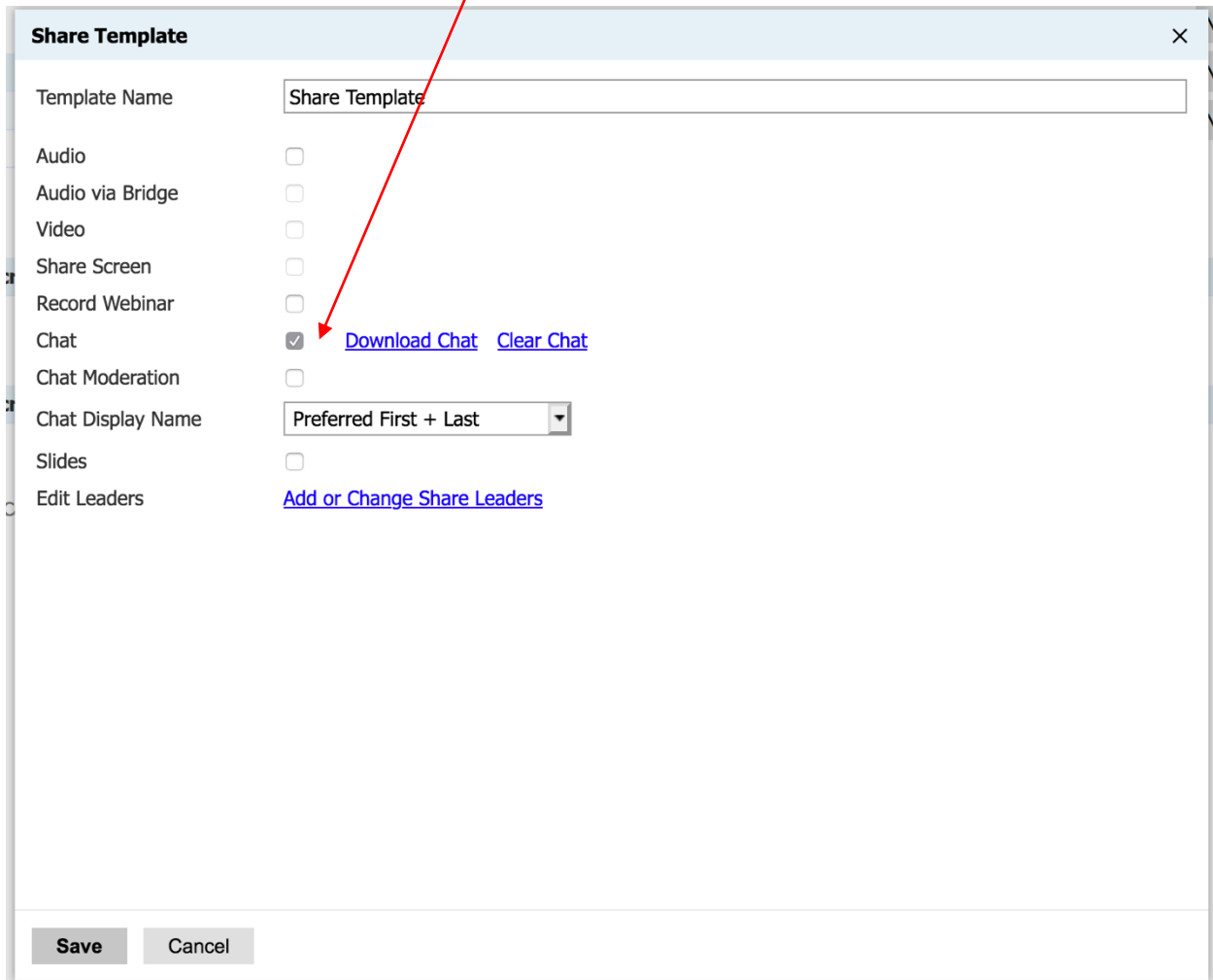
Slides

Edit Leaders [Add or Change Share Leaders](#)

Save **Cancel**

- Audio – allows for presenters to use their microphones/recording devices to capture and play audio share.
- Audio via Bridge – allows for 2-way audio via a conference bridge. In place of a separate phone line, audio from both presenters and participants can be utilized within Share and recorded for later use.
- Video – allows multiple presenters to broadcast videos but attendees do not share their video. The interface updates based on the number of moderators to allow multiple simultaneous videos broadcasted (one for each moderator with video enabled).
- Share Screen – allows sharing of content on primary or secondary monitors, useful for doing a live demonstration.
- Record Webinar – Allows users to record the full content from any online webinar hosted via Slate’s Share platform. The recording combines all aspects of a Share broadcast including slides, multimedia, live screen sharing, and audio/video into one simple playback interface. Recorded webinars can be viewed in their entirety, or one can simply skip through the recording to important moments.

- Chat – Allows participants to chat during webinar. If “Chat” is enabled, “Moderated Chat” also becomes an option. If Moderate Chat is not enabled, chat messages will be seen by all attendees and the presenter as they come in. When it is enabled, all questions from participants will appear in the Questions tab, where they will require moderator approval before being seen by all participants.



The screenshot shows a 'Share Template' dialog box with the following settings:

Template Name	Share Template
Audio	<input type="checkbox"/>
Audio via Bridge	<input type="checkbox"/>
Video	<input type="checkbox"/>
Share Screen	<input type="checkbox"/>
Record Webinar	<input type="checkbox"/>
Chat	<input checked="" type="checkbox"/> Download Chat Clear Chat
Chat Moderation	<input type="checkbox"/>
Chat Display Name	Preferred First + Last
Slides	<input type="checkbox"/>
Edit Leaders	Add or Change Share Leaders

At the bottom of the dialog are 'Save' and 'Cancel' buttons. A red arrow points from the 'Chat' checkbox to the 'Download Chat' link.

- Slides – Allows attendees to see only the current, current and previous, or all slides, based on preference.

Share Template [Close]

Template Name:

Audio

Audio via Bridge

Video

Share Screen

Record Webinar

Chat

Chat Moderation

Slides

Slide Display:

Edit Leaders

Slides

Upload Slides: No file selected.

URL/Video:
URLs and videos must support access and delivery via HTTPS.

- The Edit Leaders function assigns the users that will be leading or working on the online event. Edit Leaders must have access to Slate.

Participants must be registered for the event in order to access the online event. Each participant will receive a personalized link to the webinar. In order for participants to get this link, event communications must be set up.

1. Click on Edit Communications:

The screenshot shows the 'Open House 2020' event page. At the top right, there is an 'Edit' button. Below it, a dropdown menu is open, showing options: 'Edit Communications', 'Edit Form', 'New Query', 'New Query (Preview)', 'New Report', and 'New Events'. A red arrow points from the text '1. Click on Edit Communications:' to the 'Edit Communications' option in the dropdown menu.

Folder: Templates
User: [Nancy Cruz](#)
Status: CONFIRMED
Documents: [Edit Documents](#)

Share Templates

Name	Features	Updated
New Share Template		
Share Template		08/06/2020

Upcoming Instances

Date/Time	Description	Category	Status
-----------	-------------	----------	--------

Past Instances

2. Click on New Mailing

The screenshot shows the 'Communications' page for the 'Open House 2020' event. At the top right, there is a 'New Mailing' button. A red arrow points from the text '2. Click on New Mailing' to this button.

Editing these mailings will update mailings for all associated event(s).

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3. Fill out the New Mailing box and Save

The 'New Mailing' form is shown with the following fields filled out:

- Name: Link for Event
- Trigger: Upon registration or update
- Group: Email + Confirmation Page
- Status: Active
- Method: Email
- UTM Tracking: Disabled
- Attach iCal: Do not attach iCal file
- Hide from Timeline:

Buttons: Save, Cancel

4. Click Edit Message:

Method Email
Form Open House 2020
Trigger Upon registration or update
Group Email + Confirmation Page
Status Active
Pre-Flight **Error: Recipient field is missing.**
Error: No subject has been specified.

	Opens/Clicks	Browser/Location	Sent
1			0

Delivered 0
Opens 0

5. Fill out the needed information to send out email. To include the personalized link to the webinar, include the merge field "Form-Share-Link". It appears as "Access Webinar" when dragged into the mailing. This will merge the link to the Share Webinar and tie it to the registrant's person ID.

Sender "UCR Graduate Division" <no-reply@admissionsucr.edu> Reply To nancy.cruz@ucr.edu
Recipient {{sys-email}}
CC
Subject Thank you for Registering Version 1
Preheader

Form-Link
Form-Internal-Link
Form-Share-Link
Form-Share-Recording-Link
Form-Mobile-Pass
Form-Title
Form-Date-Time
Form-Date
Form-Time
Form-End-Date-Time
Form-End-Date
Form-End-Time
Form-Deadline
Form-Timezone
Form-Location
Form-Street
Form-City
Form-Region
Form-Postal
Form-Country
Form-Person-ID
Form-Record-ID

Access Webinar

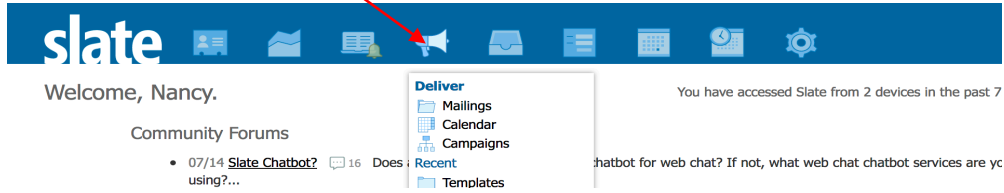
Save Cancel Edit Attachments

When registrants access the webinar through the link, they will automatically be marked as attended.

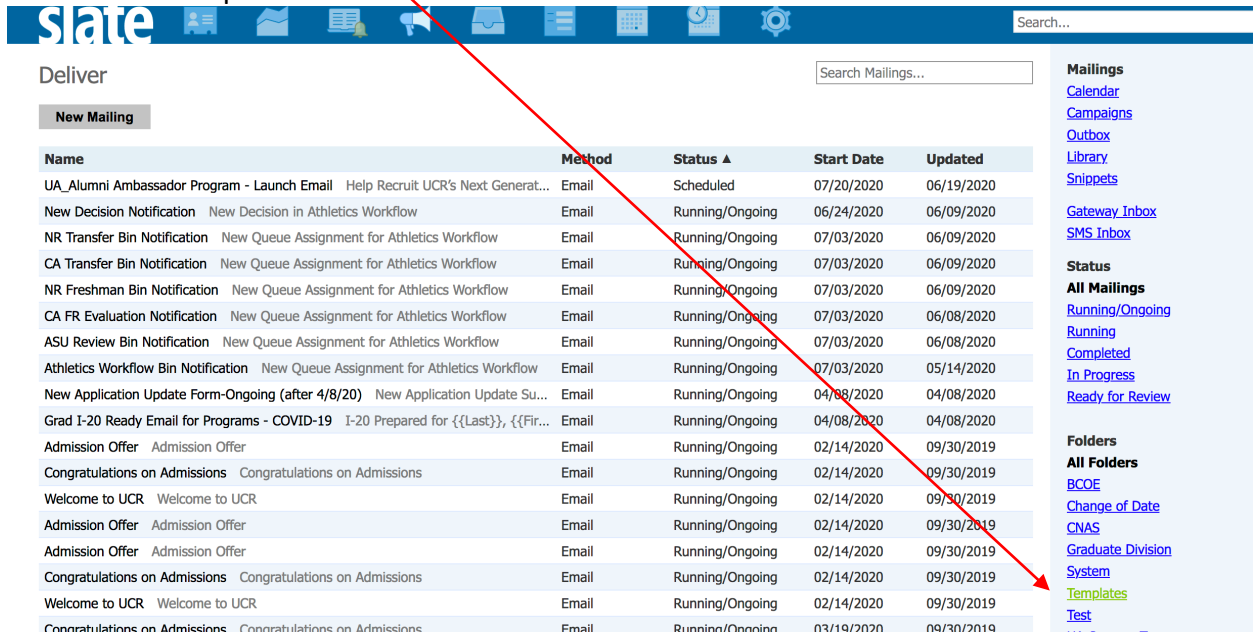
Using Mailchimp with Slate

Importing a Mailchimp Template into Slate:

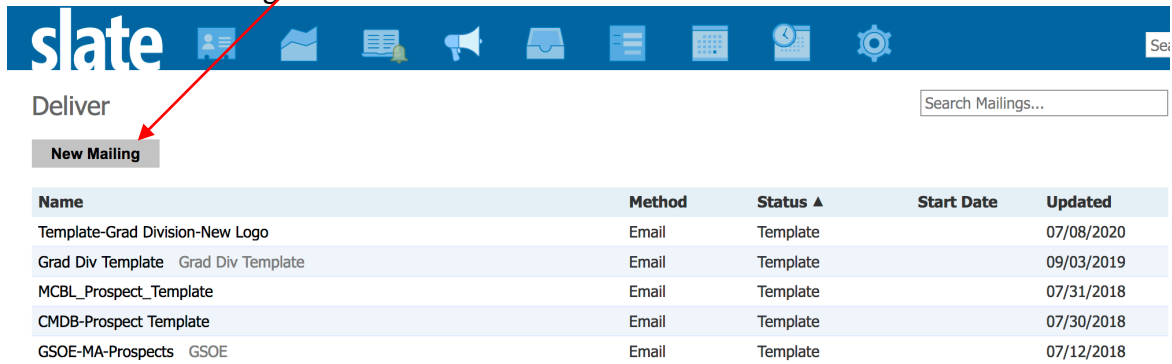
1. Click on the Deliver icon:



2. Click on the Templates folder:



3. Click on New Mailing:



4. Fill out the New Mailing box:
 - a. Name – name of your template
 - b. Folder – MUST assign all templates to the Template Folder. Do not assign a template to your department folder. You can assign your department sub-folder by selecting “Other” or finding your department name.
 - c. Click Save.

New Mailing [X]

Name: Math Template

Folder: Templates / Other
Math

The Templates and System folders are special folders that should not be used for normal message delivery. Messages in these special folders may have certain options disabled, including the option to send the message.

User: Cruz, Nancy

Realm: []

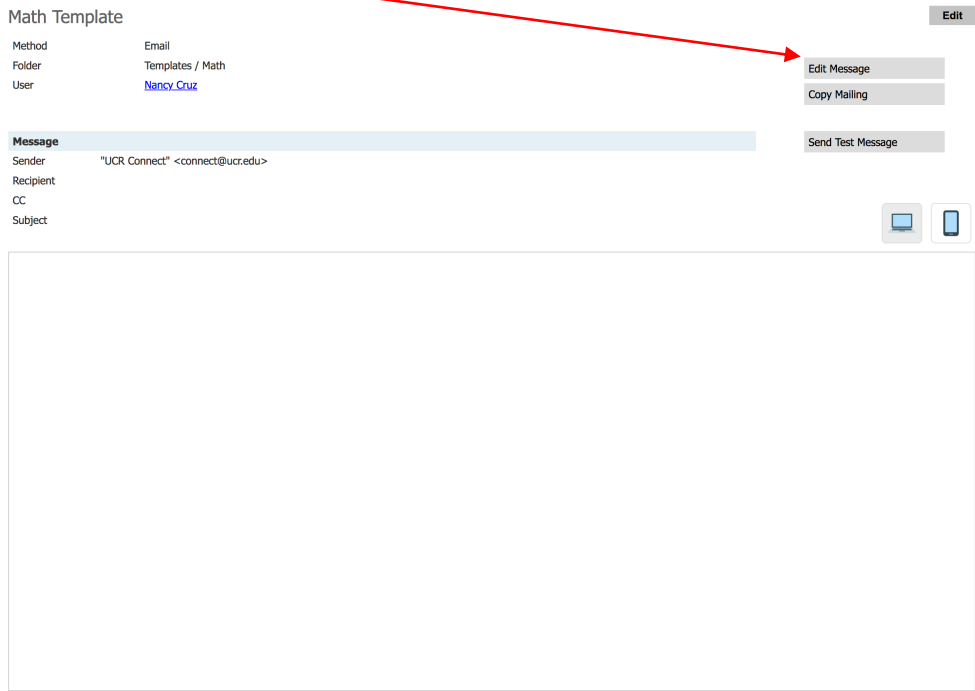
Method: Email

UTM Tracking: Disabled

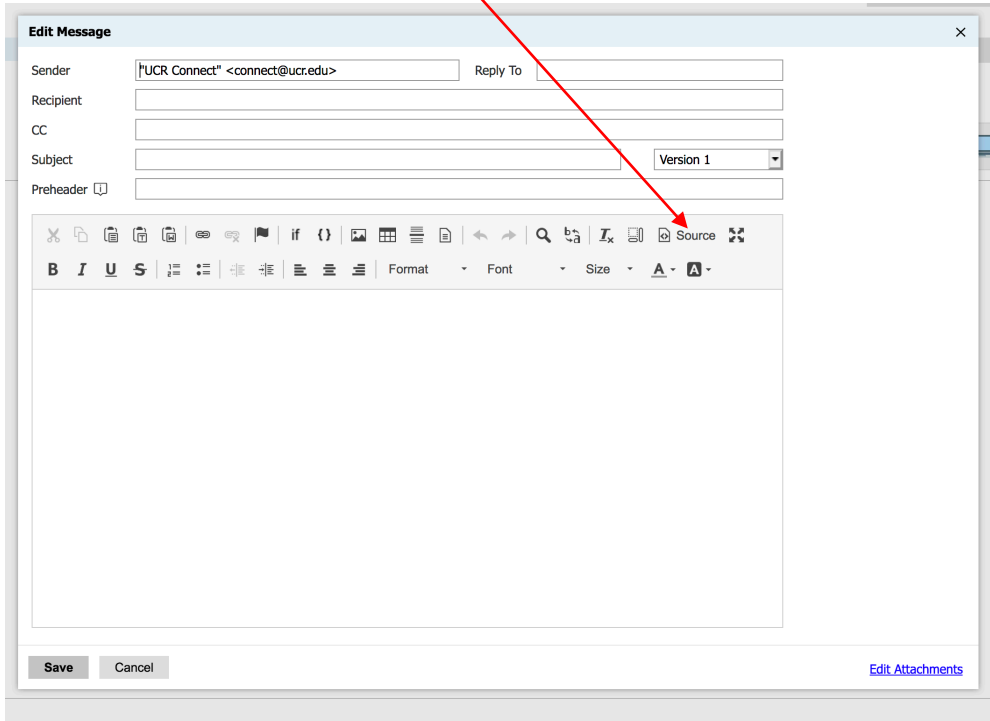
Hide from Timeline:

Save Cancel

5. Click "Edit Message":



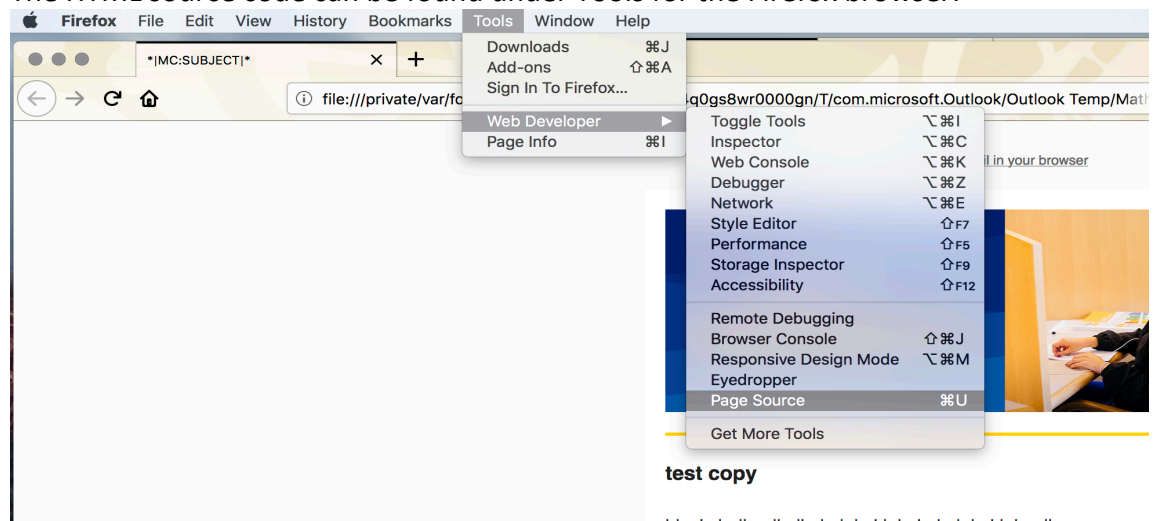
6. Click Source on the Slate text editor:



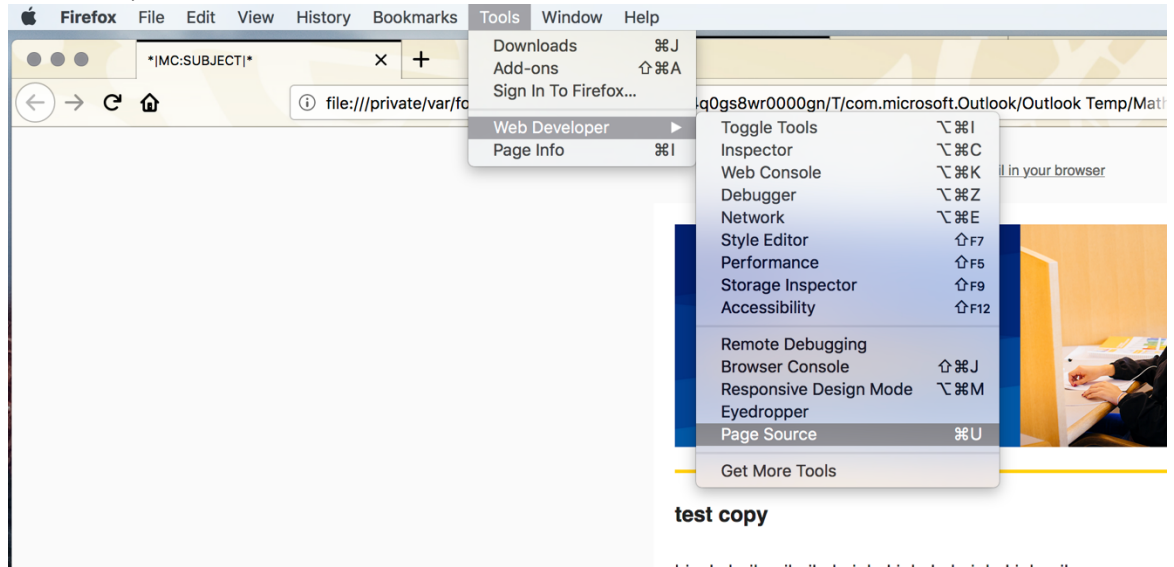
7. Delete HTML code:



- 8. Go to your mailchimp template. Copy the HTML source of the mailchimp template.
 - a. The HTML source code can be found under Tools for the Firefox browser:



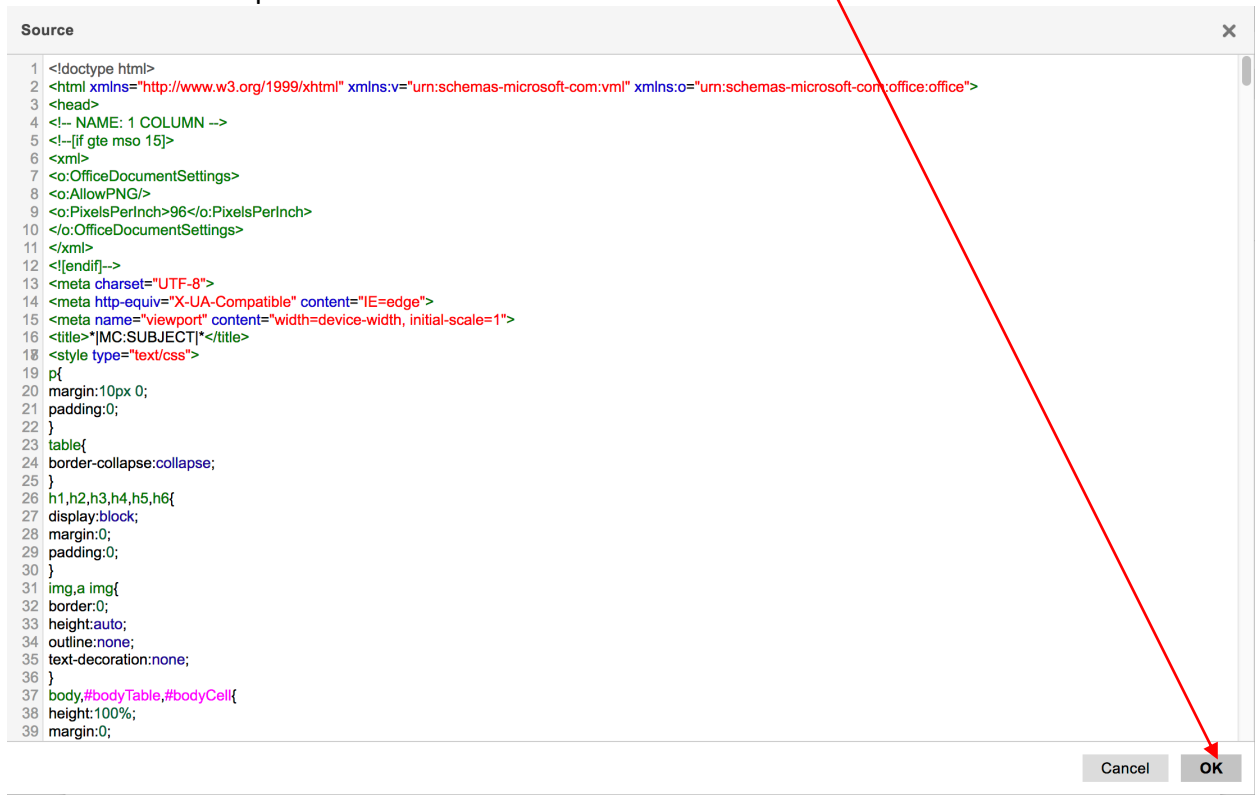
b. For Safari, the HTML source code can be found under the Tools menu:



9. Copy all the code that appears under Page Source:

```
Firefox File Edit View History Bookmarks Tools Window Help
*|MC:SUBJECT|*
file:///private/var/fc...
qOgs8wr0000gn/T/com.microsoft.Outlook/Outlook Temp/Mat...
ll in your browser
test copy
...
1 <!doctype html>
2 <html xmlns="http://www.w3.org/1999/xhtml" xmlns:v="urn:schemas-microsoft-com:vml" xmlns:o="urn:schemas-microsoft-com:
3 <head>
4 <!-- NAME: 1 COLUMN -->
5 <!--[if gte mso 15]>
6 <xml>
7 <o:OfficeDocumentSettings>
8 <o:AllowPNG/>
9 <o:PixelsPerInch>96</o:PixelsPerInch>
10 </o:OfficeDocumentSettings>
11 </xml>
12 <![endif]-->
13 <meta charset="UTF-8">
14 <meta http-equiv="X-UA-Compatible" content="IE=edge">
15 <meta name="viewport" content="width=device-width, initial-scale=1">
16 <title>*|MC:SUBJECT|*</title>
17
18 <style type="text/css">
19 p{
20 margin:10px 0;
21 padding:0;
22 }
23 table{
24 border-collapse:collapse;
25 }
26 h1,h2,h3,h4,h5,h6{
27 display:block;
28 margin:0;
29 padding:0;
30 }
31 img,a img{
32 border:0;
33 height:auto;
34 outline:none;
35 text-decoration:none;
36 }
37 body,#bodyTable,#bodyCell{
38 height:100%;
39 margin:0;
40 padding:0;
41 width:100%;
42 }
43 .monPreviewText{
44 display:none !important;
45 }
46 #outlook a{
47 padding:0;
48 }
49 img{
50 -ms-interpolation-mode:bicubic;
51 }
52 table{
```

10. Paste the mailchimp HTML source code onto Slate and click OK:



```
1 <!doctype html>
2 <html xmlns="http://www.w3.org/1999/xhtml" xmlns:v="urn:schemas-microsoft-com:vml" xmlns:o="urn:schemas-microsoft-com:office:office">
3 <head>
4 <!-- NAME: 1 COLUMN -->
5 <!--[if gte mso 15]>
6 <xml>
7 <o:OfficeDocumentSettings>
8 <o:AllowPNG/>
9 <o:PixelsPerInch>96</o:PixelsPerInch>
10 </o:OfficeDocumentSettings>
11 </xml>
12 <![endif]-->
13 <meta charset="UTF-8">
14 <meta http-equiv="X-UA-Compatible" content="IE=edge">
15 <meta name="viewport" content="width=device-width, initial-scale=1">
16 <title>[MC:SUBJECT]</title>
17 <style type="text/css">
18
19 p{
20 margin:10px 0;
21 padding:0;
22 }
23 table{
24 border-collapse:collapse;
25 }
26 h1,h2,h3,h4,h5,h6{
27 display:block;
28 margin:0;
29 padding:0;
30 }
31 img,a img{
32 border:0;
33 height:auto;
34 outline:none;
35 text-decoration:none;
36 }
37 body,#bodyTable,#bodyCell{
38 height:100%;
39 margin:0;
```

11. Your mailchimp template should now appear in the body of your Slate Template:

Edit Message


Sender: "UCR Connect" <connect@ucr.edu> Reply To:

Recipient:

CC:


Subject: Version 1

Preheader



B *I* U ~~S~~ Format Font Size

[View this email in your browser](#)



 [Edit](#)

12. Since this is a basic template for you to use when creating future communications in Slate, you do not need to fill out any information except the Subject.

Edit Message

Sender: "UCR Connect" <connect@ucr.edu> Reply To:

Recipient:

CC:

Subject: Math Template - New Logo Version 1

Preheader:

View this email in your browser

UC RIVERSIDE
MATHEMATICS

Save Cancel [Edit Attachments](#)

Please note: Mailchimp adds hidden code to the HTML source code you copy and paste to Slate. Slate may not allow your email to go out if it detects some of this coding. If you have any issues sending an email that came from a mailchimp template, please contact Nancy Cruz or fill out a Slate trouble ticket at: <https://connect.ucr.edu/register/SlateRequest>

Here is some possible coding to remove:

Mailchimp logo on email header:



Remove the `<title>*|MC:SUBJECT|*</title>` line from the source code (line 11 on this example)

```
Source
1 <html xmlns="http://www.w3.org/1999/xhtml" xmlns:o="urn:schemas-microsoft-com:office:office" xmlns:v="urn:schemas-microsoft-com:vml">
2 <head>
3 <meta charset="us-ascii" /><!-- NAME: 1 COLUMN --><!--[if gte mso 15]>
4 <xml>
5 <o:OfficeDocumentSettings>
6 <o:AllowPNG/>
7 <o:PixelsPerInch>96</o:PixelsPerInch>
8 </o:OfficeDocumentSettings>
9 </xml>
10 <![endif]--><meta http-equiv="X-UA-Compatible" content="IE=edge" /><meta name="viewport" content="width=device-width, initial-scale=1" />
11 <title>*|MC:SUBJECT|*</title>
12 <style type="text/css">p{
13 margin:10px 0;
14 padding:0;
15 }
16 table{
17 border-collapse:collapse;
18 }
19 h1,h2,h3,h4,h5,h6{
20 display:block;
21 margin:0;
22 padding:0;
23 }
24 img,a img{
25 border:0;
26 height:auto;
27 outline:none;
28 text-decoration:none;
29 }
30 body,#bodyTable,#bodyCell{
31 height:100%;
32 margin:0;
33 padding:0;
34 width:100%;
35 }
36 .mcnPreviewText{
37 display:none !important;
38 }
```

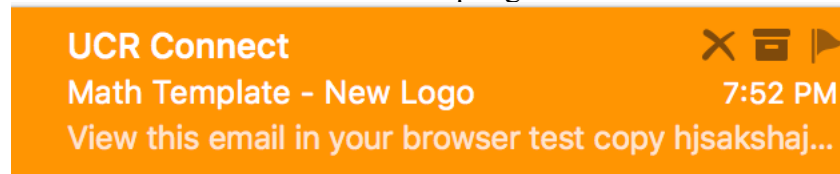
and



```
<!--*|IF:MC_PREVIEW_TEXT|*--><!--[if !gte mso 9]><!--><span class="mcnPreviewText" style="display:none; font-size:0px; line-height:0px; max-height:0px; max-width:0px; opacity:0; overflow:hidden; visibility:hidden; mso-hide:all;">*|MC_PREVIEW_TEXT|*</span><!--><![endif]--><!--*|END:IF|*-->
```

```
Source x
536 #templateFooter .mcnTextContent,#templateFooter .mcnTextContent p{
537 /*@editable*/font-size:14px !important;
538 /*@editable*/line-height:150% !important;
539 }
540
541 }
542 </style>
543 </head>
544 <body>
545 <!--|IF:
546 PREVIEW_TEXT|*--><!--[if !gte mso 9]><!--><span class="mcnPreviewText" style="display:none; font-size:0px; line-height:0px; max-height:0px; max-width:0px; opacity:0;
overflow:hidden; visibility:hidden; mso-hide:all;">*|MC_PREVIEW_TEXT|*</span><!--><![endif]--><!--|END:IF|*-->
547 <center>
548 <table align="center" border="0" cellpadding="0" cellspacing="0" height="100%" id="bodyTable" width="100%">
549 <tbody>
550 <tr>
551 <td align="center" id="bodyCell" valign="top"><!-- BEGIN TEMPLATE // --><!--[if (gte mso 9)](IE)>
552 <table align="center" border="0" cellspacing="0" cellpadding="0" width="600" style="width:600px;">
553 <tr>
554 <td align="center" valign="top" width="600" style="width:600px;">
555 <![endif]-->
556 <table border="0" cellpadding="0" cellspacing="0" class="templateContainer" width="100%">
557 <tbody>
558 <tr>
559 <td id="templatePreheader" valign="top">
560 <table border="0" cellpadding="0" cellspacing="0" class="mcnTextBlock" style="min-width:100%;" width="100%">
561 <tbody class="mcnTextBlockOuter">
562 <tr>
563 <td class="mcnTextBlockInner" style="padding-top:9px;" valign="top"><!--[if mso]>
564 <table align="left" border="0" cellspacing="0" cellpadding="0" width="100%" style="width:100%;">
565 <tr>
566 <![endif]--><!--[if mso]>
567 <td valign="top" width="600" style="width:600px;">
568 <![endif]-->
569 <table align="left" border="0" cellpadding="0" cellspacing="0" class="mcnTextContentContainer" style="max-width:100%; min-width:100%;" width="100%">
570 <tbody>
571 <tr>
572 <td class="mcnTextContent" style="padding: 0px 18px 9px; text-align: center;" valign="top"><a href="**|ARCHIVE|**" target="_blank">View this email in your browser</a></td>
573 </tr>
574 </tbody>
575 </table>
576 </tr>
577 </tbody>
578 </table>
579 </tr>
580 </tbody>
581 </table>
582 </center>
583 </body>
584 </html>
```

Cancel OK

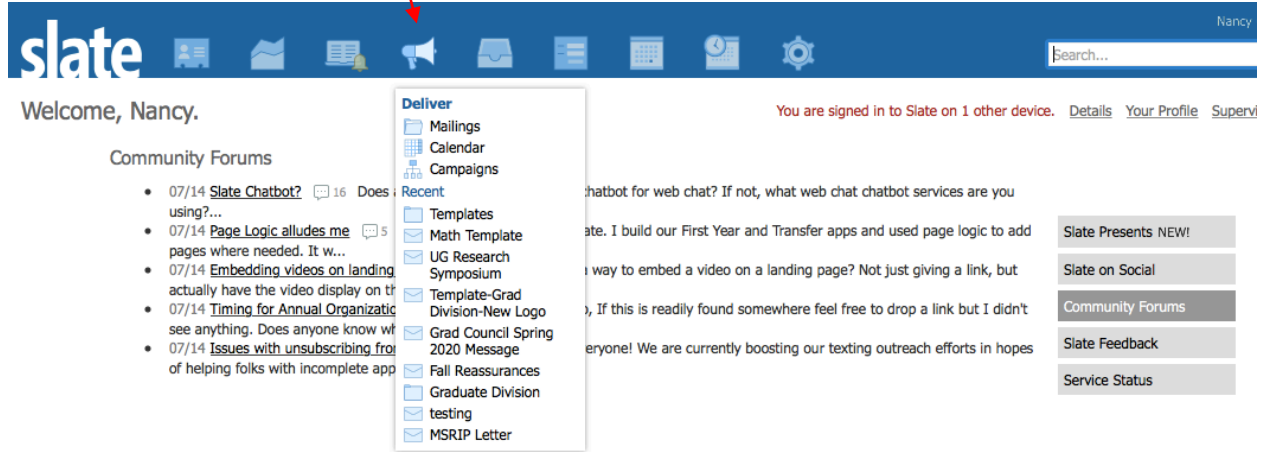
This should clear out the mailchimp logo:



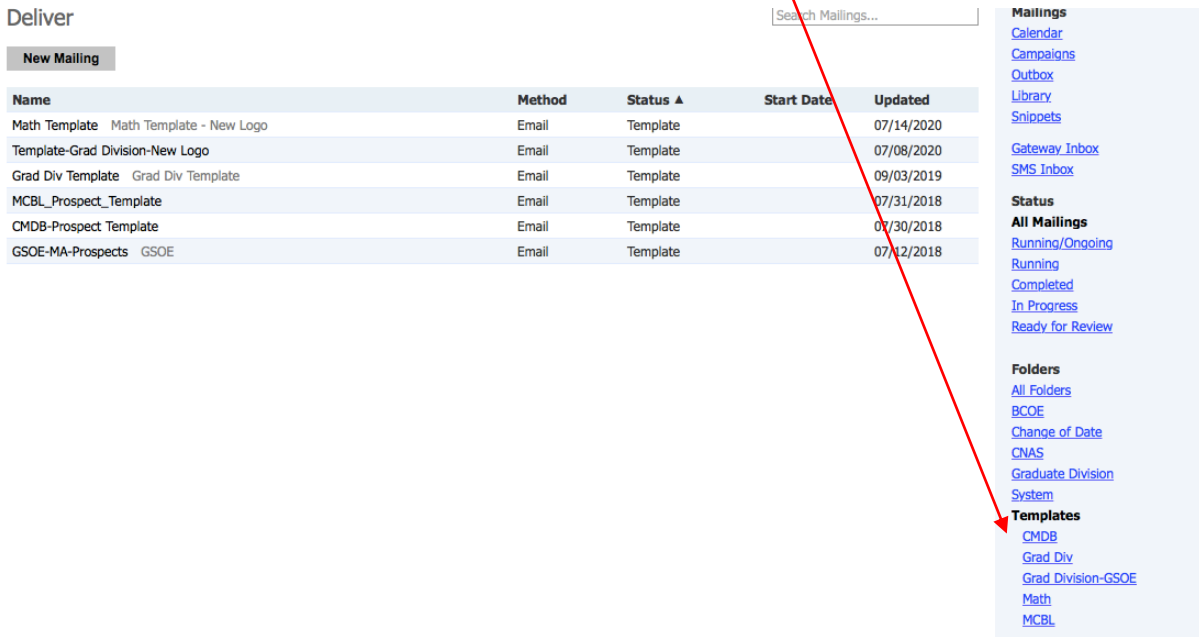
Nancy Cruz 
<no subject> 7:19 PM
Nancy Cruz has shared a OneDrive for Business file

To use a previously created template:

1. Go to Deliver Tab in Slate



2. Click on Templates then click on your department folder:



3. Click on the Template you wish to use:

Deliver [Search Mailings...]

New Mailing

Name	Method	Status ▲	Start Date	Updated
Math Template <small>Math Template - New Logo</small>	Email	Template		07/14/2020
Template-Grad Division-New Logo	Email	Template		07/08/2020
Grad Div Template <small>Grad Div Template</small>	Email	Template		09/03/2019
MCBL_Prospect_Template	Email	Template		07/31/2018
CMDB-Prospect Template	Email	Template		07/30/2018
GSOE-MA-Prospects <small>GSOE</small>	Email	Template		07/12/2018

Mailings

- [Calendar](#)
- [Campaigns](#)
- [Outbox](#)
- [Library](#)
- [Snippets](#)
- [Gateway Inbox](#)
- [SMS Inbox](#)

Status

All Mailings

- [Running/Ongoing](#)
- [Running](#)
- [Completed](#)
- [In Progress](#)
- [Ready for Review](#)

Folders

- [All Folders](#)
- [BCOE](#)
- [Change of Date](#)
- [CNAS](#)
- [Graduate Division](#)
- [System](#)

Templates

- [CMDB](#)
- [Grad Div](#)
- [Grad Division-GSOE](#)
- [Math](#)
- [MCBL](#)

4. Click on Copy Mailing:

All Mailings

Math Template Ed

Method	Email
Folder	Templates / Math
User	Nancy Cruz


Edit Message

Copy Mailing


Send Test Message

Message

Sender	"UCR Connect" <connect@ucr.edu>
Recipient	
CC	
Subject	Math Template - New Logo



[View this email in your browser](#)



5. Fill out the Copy Mailing screen:
 1. Name - Name of communication
 2. Folder - Change from Template folder to your department folder. First change to Graduate Division and then find your department subfolder. Click copy:

6. Click "Edit Message" to begin editing your email.

Once you've copied your template, it becomes a sendable communication. You will need to create a query or upload a spreadsheet to send out the email. Please see "How to Edit A Mailing" for instructions on editing emails. Please see "How to Create A Query" to create a query.