Slate – Admissions Manager

Slate is the system used by prospective students when applying for admission to Chicago Booth. Slate has functionality to manage applications, as well as Reader functionality to view, print and assign people to read applications.

Login to Slate Manager

1. Open a web browser.
    a. Google Chrome is the preferred browser when using Slate, but it is not required.
        i. Any internet browser may be used.
        ii. If you do not have Chrome installed on your machine, you may download it at http://google.com/chrome.
    b. Point it to: https://apply.chicagobooth.edu/manage.
2. Login with your Booth User Name and Password.

Lookup Records

You may search for applications by clicking on the Lookup Records icon.

1. From left of the top menu, click on the **Lookup Records** button.
2. Select **Search Database**.
3. Select your search criteria:
    a. By default, a filter for *Partial Match* is selected.
        i. This will search on a partial match within the Name fields or Email field.
        ii. Enter a value for a *Partial Match* search.
    b. Select or remove additional filters, if desired.
4. Click on the **Search** button.

TECH NOTE: View an application record directly from the search results by clicking on the Lookup link.

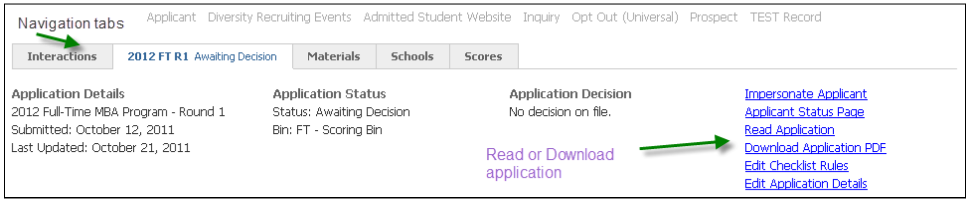
Download an Application

An application may be downloaded to PDF and then printed.

1. Open an Application.
2. On the right-hand side, click on the **Download Application PDF** link.
3. From the dropdown arrow, select the appropriate parts of the application to include in the PDF.
4. Click on the **Download** button.
5. The application opens in PDF format.

Navigating an Application

Each application will have tabs just under the contact information which you can use to navigate through the application.



Use the hyperlinks on the right to view and perform actions on the application.

1. *Impersonate Applicant* – log in to the application as the applicant.
    a. You will view the application as the applicant views it and in real time as they make changes to it.
    b. To leave the *Impersonate Applicant* view, click on the blue **X** in the upper right hand corner of the page.
2. *Application Status Page* – displays status page of the application as the applicant views it.
    a. It outlines recent activities and provides a checklist of materials and forms that are needed.
    b. To leave the *Applicant Status Page* view, click on the blue **X** in the upper right hand corner of the page.
3. *Read Application* – displays the application and all supporting materials and tags in a consolidated format for ease of reviewing.
    a. A menu is available on the left to jump to different areas within the application.
    b. To leave the *Read Application* view, click the **Close** button on the top right corner.
4. *Download Application PDF* – allows the application to be saved as a PDF.
5. *Edit Checklist Rules* – the checklist rules are not currently enabled.
6. *Edit Application Details* – allows the application to be moved to another round, bin or put in a queue, or to be marked as submitted by an administrator.

Queries & Reports

Queries and Reports allow users to create re-usable queries and reports.

To run an existing query or report:

1. From the top menu, click on the **Reports** button.
2. On the right, click on a folder to see the reports and queries.
3. On the left, click on a query to execute.
4. Click on the **Run Query** button.
5. To view an Applicant record from the search results, click on the **+** link in the search result record.
6. Export the results to a file.
    a. Under *Destination*, select the radio button of the format in which to save the query results.
    b. Click on the **Export** button.
7. If you only need to view on the screen, view the data then click on the **Return** button to go back.
8. Continue clicking on the **Return** button to go back to the top level of the section.

To build a new query or report:

1. From the top menu, click on the **Reports** button.
2. To create and save a query, click the **New Query** button.
    a. Type a name for your query; follow the naming conventions.
    b. Select a folder for the query. To create a new folder, select **Other** and type a folder name.
    c. Select the type of records to be returned from this query.
    d. Select the appropriate options.
    e. Click on the **Save** button.
    f. Set up the columns to display in your query and the filters.
        i. On the left, check the checkboxes of the columns to be displayed.
        ii. On the right, drag and drop the yellow column headings to arrange the order of the columns.
        iii. On the bottom, add any filters to narrow down the search results.
        iv. Click on the **Save** button.
        v. To run the query, click on the **Run Query** button.
        vi. To modify the query, click on the **Edit Query** button.
        vii. To return to the main query view, click on the **Return** button.
3. To create a one-time query not needing to be saved, click on the **Quick Query** button.
    a. Select the type of records to be returned.
    b. Click on the **Continue** button.
    c. Set up the columns to display in the query and the filters.
        i. On the left, check the checkboxes of the columns to be displayed.
        ii. On the right, drag and drop the yellow column headings to arrange the order of the columns.
        iii. On the bottom, add any filters to narrow down the search results.
        iv. To run the query, click on the **Run Query** button.
        v. To save the query, click on the **Save Copy** button.

To download Applications from a Query or Report.

TECH NOTE Maximum of 500 applications may be downloaded to PDF at once using this option.

1. Run a selected Query or Report.
2. From the results screen, select the **PDF Document Export** radio button.
3. Click on the **Select Parts** link.
4. Click on the dropdown and select the appropriate options to include in the PDF.
5. Check the **Export as individual PDFs within a ZIP archive** check box.
6. Click on the **Save** button.
7. Click on the **Export** button.

The export may take a few minutes depending on how many applications and parts were selected.

TECH NOTE **Note:** Once generated the ZIP archive will contain individual PDFs of all of the applicants selected along with the parts chosen.

Application Reader

Applications may be read and reviewed online screen.

1. From the top menu, click on the **Application Reader** button.
2. Use the buttons on the right to view your queue of applications to review, the application Bins or all applications.
    a. *Dashboard* – returns you back to the home page or dashboard of Slate.
    b. *Queue* – displays the items which are assigned to you.
    c. *Bins* – displays the bins for all programs.
        i. Bins are used to organize the applications based on their progress through the read process.
        ii. Each Program has a custom set of bins, based on their specific read processes. Scroll down to view each set of bins per Program.
        iii. Click on a bin to view the applications within that step of the read process.
            1. The list of applications appears.
            2. Click on the **Display Copy** button to view the application.
            3. Click on the **Add to Queue** button to add the application to your Queue.
            4. Add filters on the right to narrow down the applications within the bin which are displayed.
    d. *Apps* – displays all Applications within the selected bin.
        i. Add filters on the right to narrow down the applications within the bin that are displayed
3. Click on the **Close** button to return to the Slate application.

E-mail Delivery

The Deliver area houses the emails which are wired to the applications and workflows to be sent out for a particular scenario, as well as marketing emails.

1. From the top menu, click on the **Deliver** button.
2. Emails wired to the applications and workflows should <u>not</u> be modified.
3. Marketing emails can be modified and new marketing emails can be created.
    a. If you create a new marketing email, place it in the appropriate Program's email folder; follow the naming conventions.

Form Builder, Event Registration, Scheduler

The Forms are currently being built out for Booth by Slate. If you need a new form built, please contact Slate.
Events have not currently been implemented.
Scheduler is used to schedule interviews.

Manage Database

The Slate TV is the only section you should use here. It contains training videos you may watch to learn how use to better use Slate.

Naming Conventions

When naming an item in Slate, it should follow these conventions.

1. Prefix the query name with your Program.
    a. *FT – Round 1 Admits.*
    b. *FT – Round 2 Admits.*