

More Than One Way To Play a Hand: Approaches for Optimizing Your Office's Inventory Management

Presented by

Eric Hoffpauir

AUP

Jon Rowand

ReWorkflow

**Slides and ReSources
available at:**



Eric Hoffpauir (pronounced “Hoff-power”)

- Started in Slate in 2022
- Slate Administrator for Enrollment at The American University of Paris since January 2025 – solo Captain
- Previously on a Slate team at Kansas State University - undergrad and grad instances
- I live in Manhattan... Kansas.
- I love to travel, read, and play dorky video games



AUP Facts



1283

STUDENTS

1148
UNDERGRAD

135
GRADUATE



110

NATIONALITIES



21

NATIONALITIES
(FACULTY)



57

LANGUAGES
SPOKEN

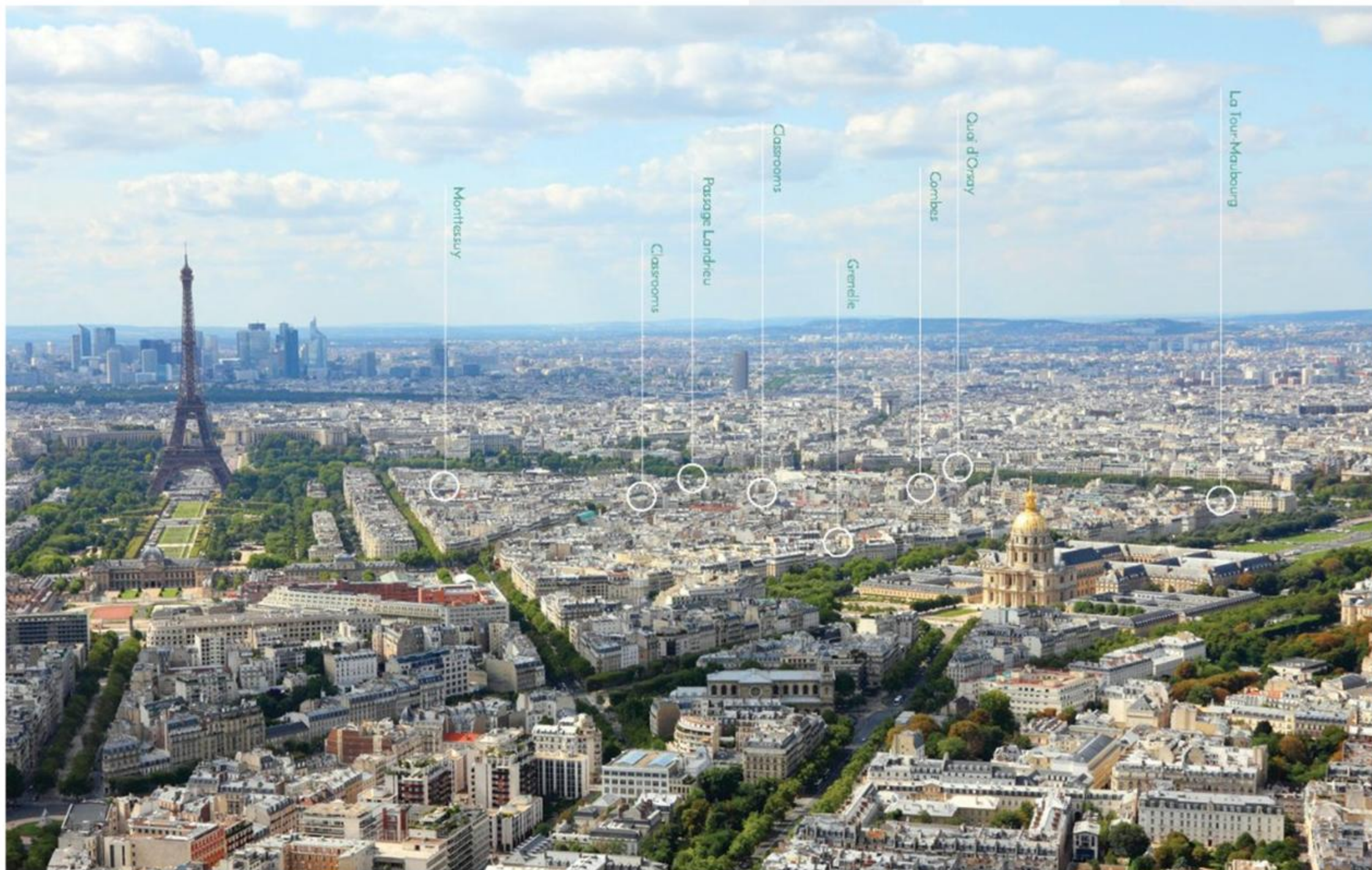


31%

MULTIPLE
PASSPORTS

74%

OF FACULTY
SPEAK 3+
LANGUAGES



Jon Rowand

- Founder & CEO of ReWorkflow
- 20+ Years in International Higher Education
- Began Slate'in back in 2019
- Currently based in Hanoi, Vietnam
- Love traveling with my family of four, distance running, and all things Seattle sports



Introduction & Context

Why track inventory?

Common Challenges

- Materials disappear into the void
- Lack of real-time visibility
- No centralized system of record
- Staff resistance to keeping usage logs
- Hard to forecast restocks

Often leading to last-minute scrambles

Introduction & Context

Events Data → Query Live Sync → Excel or CSV/Google Sheets

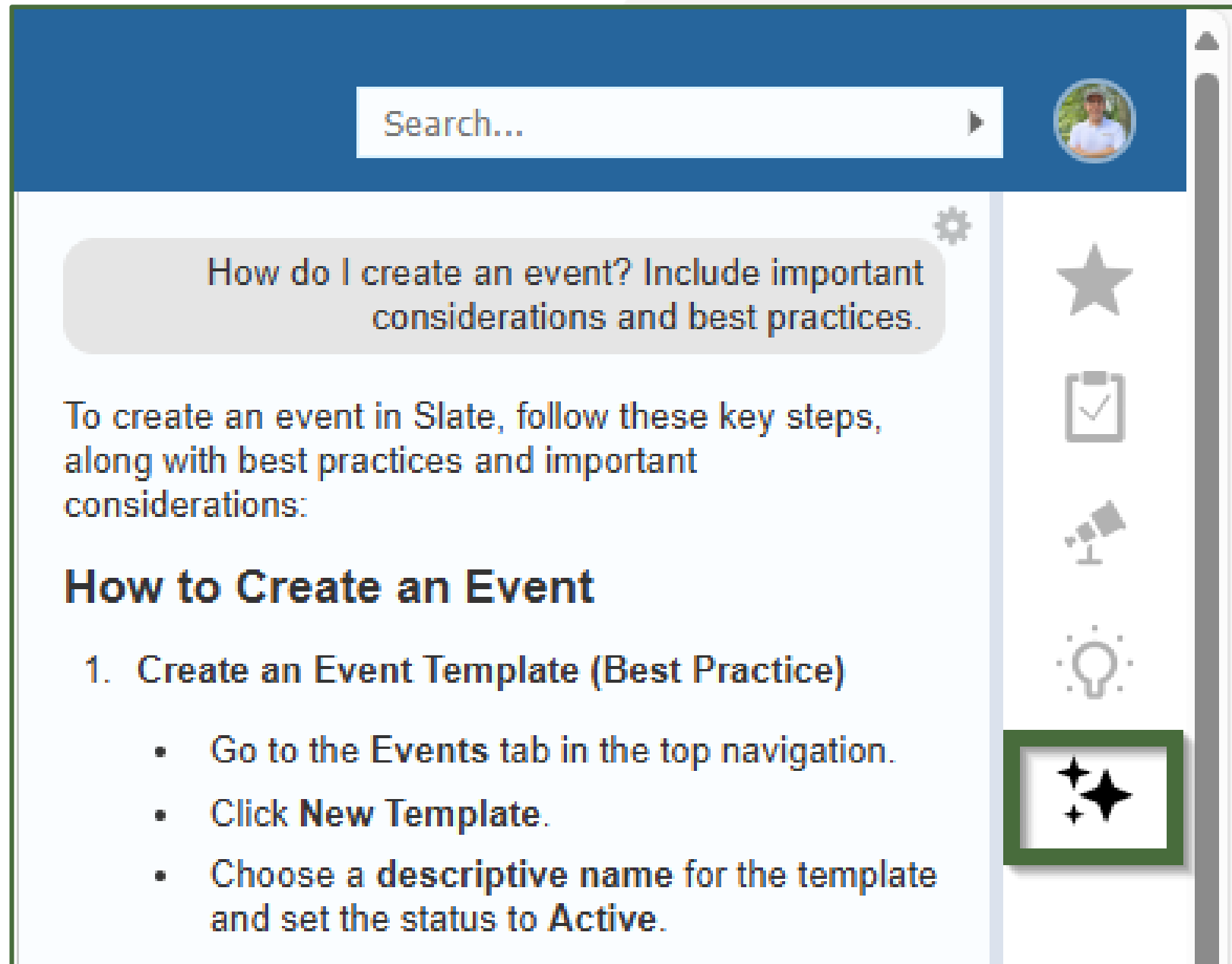
Who this approach could be for?

- Small teams
- Limited time and/or tech support
- Need quick, actionable data
for specific inventory case uses

Slate Solution at a Glance

- ✓ **Events / Event Templates**
- ✓ **Event Notes**
- ✓ **Query with Query Live Sync**
- ✓ **Excel or Google Sheets**

Events / Events Templates



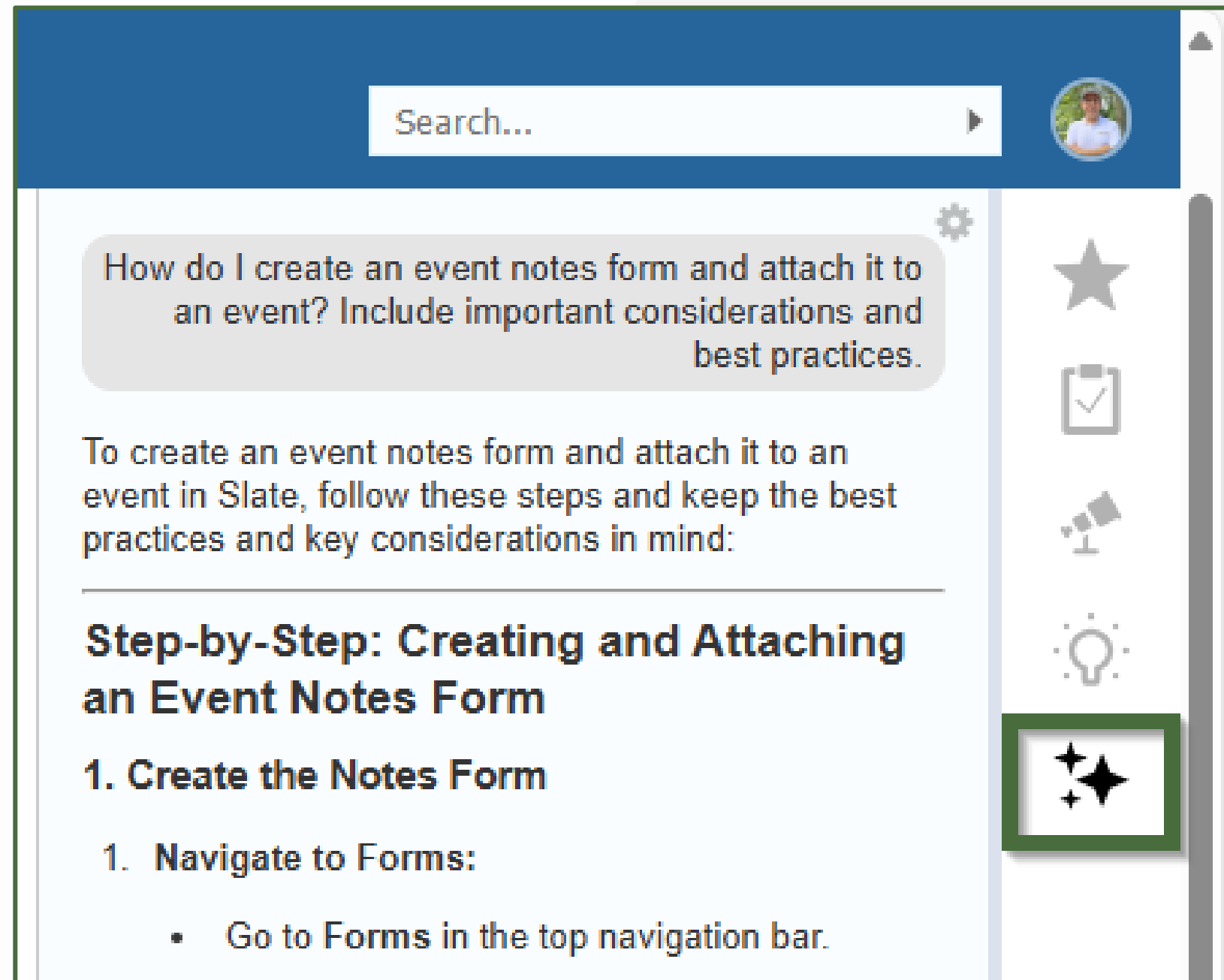
🌟 Ask Slate AI

"How do I create an event? Include important considerations and best practices."

Slate Knowledge Base › Events

<https://knowledge.technolutions.net/docs/events-events-and-interviewsevents>

Event Notes Form



🌟 Ask Slate AI

"How do I create an event notes form and attach it to an event? Include important considerations and best practices."

Slate Knowledge Base › Form and Event Notes

<https://knowledge.technolutions.net/docs/en/form-and-event-notes>

🎉 New Feature Announcement

Scope selection is moving from Edit Properties (after form creation) to New Form (at creation)!

Event Notes Form

November Open House

Notes Edit

Edit Notes

Enroll, Drew

Materials & Swag

Count for Items Sent Ahead to the Event

Viewbooks	100	FinAid Brochures	100	Program Guides	100	Transfer Pathways	50
Notepads	50	Pens	200	Stickers	50	Tote Bags	20

Count for Items Left Over After the Event

Viewbooks	64	FinAid Brochures	57	Program Guides	52	Transfer Pathways	24
Notepads	50	Pens	134	Stickers	50	Tote Bags	20

Count for Items Given Out at the Event

Viewbooks	36	FinAid Brochures	43	Program Guides	48	Transfer Pathways	26
Notepads	0	Pens	66	Stickers	0	Tote Bags	0

Portals & Website Maintenance

Event Recording URL

Event Recording Short Description

Save Cancel

Inventory (Materials & Swag)

- Conditionally displays based on Event Mode
(i.e. "On-Campus" and "Off-Campus" events)
- Three Sections
 - Items Sent | Items Left Over | Items Given Out
- Calculations
 - Items Sent – Items Left Over = Items Given

Event Notes Form

Edit Field

Status	Active ▼
Type	Text Box ▼
Label	<div>B <i>I</i> <u>U</u> S 🔗 🔗 🔗 🔗</div> <div>Viewbooks</div> <div><input type="checkbox"/> Hide Label</div>
Placeholder Text	
System Field	▼
Export Key	sent_viewbooks
Data Type	Real ▼
Size	Width: <input type="text" value="5"/>

Custom Fields

- Type = Text Box
- Label (varies)
- Export Key (varies)
- Data Type = Real
- Size > Width (varies)

Rinse and Repeat for:

- Items Sent
- Items Left Over

Event Notes Form

Edit Field

Status

Active ▾

Type

Text Box ▾

Label

B **I** **U** **S** | | | | | **I_x** Source

Viewbooks

☐ Hide Label

Placeholder Text

System Field

▾

Export Key

count_viewbooks

Data Type

Real ▾

Size

Width:

Format Mask

Maximum Counts

Characters: Words: Display:

Do not display ▾

Minimum Counts

Characters: Words: Display:

Do not display ▾

Calculation Formula

(@sent_viewbooks - @remain_viewbooks)

Auto-suggest

▾

Custom Fields Calculations

Type, Label, Export Key, Data Type, Size...

Calculation Formula

(@sent_viewbooks - @remain_viewbooks)



Reduces math/manual input errors 🚀

Event Notes Form

All Events

November Open House

Date

Monday, November 11, 2024 at 04:00 PM Mountain Standard Time UTC -07:00

Location

Los Angeles

San Diego

Dr. Emmett Brown Auditorium

1640 Riverside Drive

Hill Valley, CA

United States

Edit Map

Driving Directions

Template

Open House

Folder

Open House

User

Jon Rowand

Status

CONFIRMED

Scope

Person

URL

<https://go.reworkflow.com/register/?id=607b5c73-c855-4c81-9ac5-11dcf248725d>

Documents

Edit Documents

Registrants (0)

Launch Check In

Launch Registration

Space Available: 20

Registered

Cancelled

All Registrants

Registrant

New Registration

Slate (ReWorkflow)

Edit Notes

Event Metrics

Event Mode

On-Campus

Promoted Study Programs

(Select all that apply)

Accounting

Anthropology

Art History

Biology

Promoted Academic Department

(Select all that apply)

Anthropology

Biological Sciences

Chemistry

Civil and Environmental Engineering

Names of Faculty/Dept Representative(s)

(Select all that apply)

Grant, Adam

Harari, Yuval Noah

Huberman, Andrew

McGregor, Hannah

Admission Staff Representative(s)

(Select all that apply)

Alum, Dean

Credit, Ivy

Dents, Stu

Enroll, Drew

Materials & Swag

Count for Items Sent Ahead to the Event

Viewbooks

99

FinAid Brochures

88

Program Guides

77

Transfer Pathways

66

Notepads

55

Pens

44

Stickers

33

Tote Bags

22

Count for Items Left Over After the Event

Viewbooks

81

FinAid Brochures

72

Program Guides

63

Transfer Pathways

54

Notepads

36

Pens

27

Stickers

18

Tote Bags

9

Count for Items Given Out at the Event

Viewbooks

18

FinAid Brochures

16

Program Guides

14

Transfer Pathways

12

Notepads

19

Pens

17

Stickers

15

Tote Bags

13

Portals & Website Maintenance

Event Recording URL

www.reworkflow.com/open-houses/nov-2024

Event Recording Short Description

Marketing & Communications

Invite Mailing Needed?

☒ Yes

Notes for Marketing Team

Please include really cool information.

Marketing Team Internal Use Only

Mailing Sent Date

1

Marketing Team Comments

Save

Cancel

Notes

Edit

Edit Communications

Edit Form

Export Data

Export PDF

New Query

New Report

Search Registrants...

Status

Submitted

hera3 / mora / rnf

(Additional) Event Metrics

- Program being promoted
- Faculty participation
- Event staffing
- Recording link
- Marketing and Communication requests
- More granular internal notes use cases (i.e. going beyond Edit > Notes)

ReWorkflow

Query Set Up

🌟 (The Future of) Ask Slate AI

"I have setup an event notes form where users/hosts of events will input data about their events.

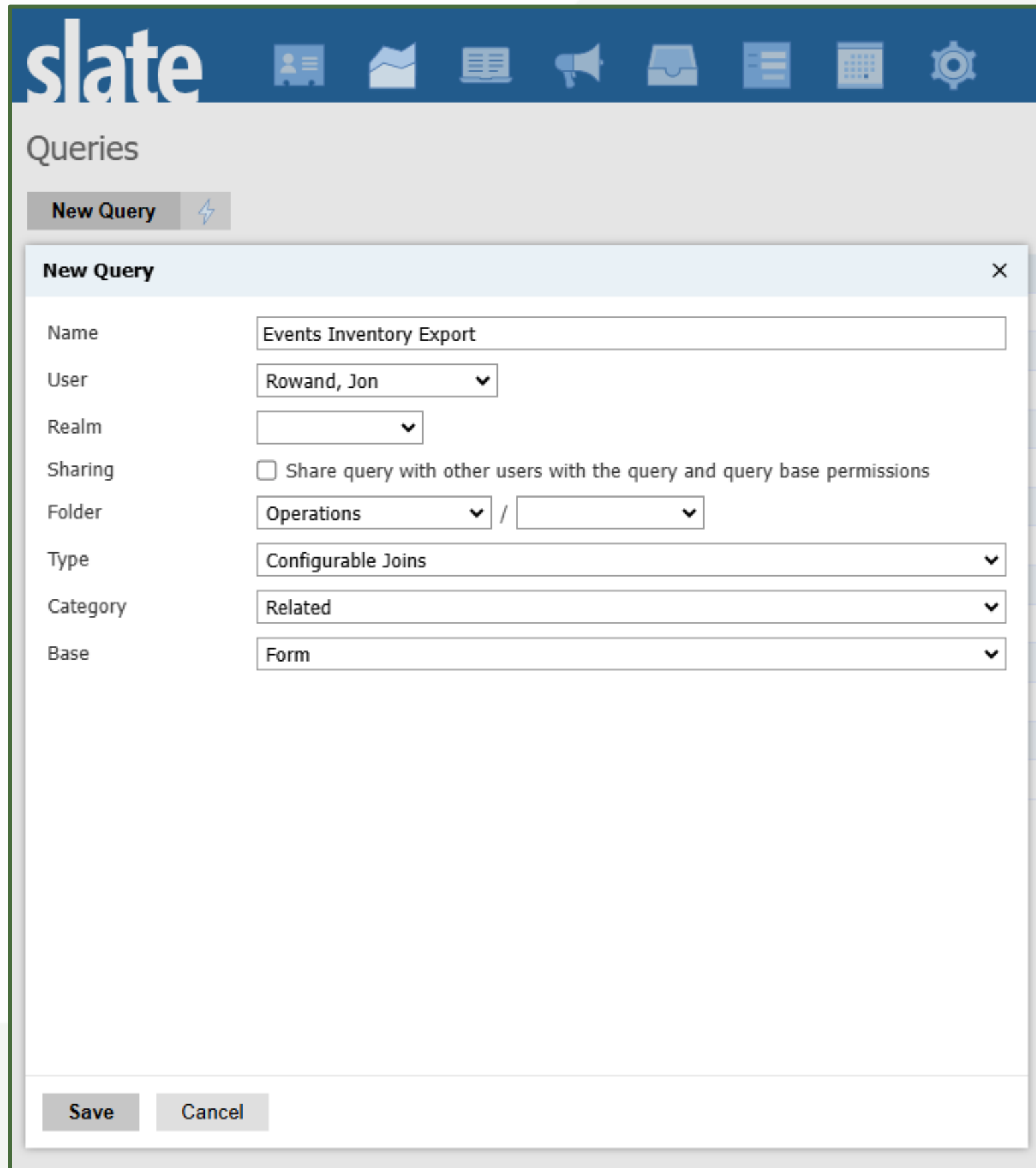
Here is the link to the event notes form: <https://go.reworkflow.com/manage/form/form?id=9633bf40-fc4f-4e03-93c6-c5a7b3fda133>

While there are a lot of fields here, I'm particularly looking to export the data from the "Event Mode IN Off-Campus, On-Campus" section and under the "Materials & Swag" header row specifically. Create an Events scoped query that includes the aforementioned data points as well as all basic information about events like event title, event date, location, and any others you recommend."

"The query capability of Slate AI is not yet available on this database. However, I can guide you on how to create this Event-scoped query in Slate:"

 ***Let's dive in →***

Query Setup



The screenshot shows the 'New Query' dialog box in the 'slate' application. The dialog has a title bar with a close button. It contains several fields for configuring a new query:

- Name:** A text input field containing 'Events Inventory Export'.
- User:** A dropdown menu showing 'Rowand, Jon'.
- Realm:** A dropdown menu with a downward arrow.
- Sharing:** A checkbox labeled 'Share query with other users with the query and query base permissions', which is currently unchecked.
- Folder:** A dropdown menu showing 'Operations' followed by a slash and another dropdown menu.
- Type:** A dropdown menu showing 'Configurable Joins'.
- Category:** A dropdown menu showing 'Related'.
- Base:** A dropdown menu showing 'Form'.

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

New Query

- Name (varies)
- User (varies)
- Folder (varies)
- Type = Configurable Joins
- Category = Related
- Base = Form

Query Setup

Edit Query Joins

Filters

- Events Notes(varies)

- Start Date (varies)

- End Date (varies)

- Folder (varies)

- Event Notes / {{custom field(s)}} (varies)

Sort

- Form Start Date/Time = (varies...I prefer ascending)

Filters

[Query Profiler](#)

Matching Rows: 77

Start Date

>= 05/04/2024

Filter

End Date

<= Now

Custom SQL

Folder

IN Admitted Student Events / Admitted Student Day, Admitted Student Events / OffCampusEve...

OR

Events Notes / Metrics_Eventmode

NOT IN Virtual

NOT

Inventory Count > 0

Exists

(

)

Sorts

Form Start Date/Time

asc

Sort

Joins

Events Notes

Rank

Row Offset: 1

Join

Query Setup

Edit Query Exports

Exports

Folder  Rank Row Offset: 1

Event Title

Event Type

Start Date

Count Viewbooks

Count Finaid

Count PGBs

Count TPBs

Count Notepads

Count Pens

Count Stickers

Count Totes

Location

Admin URL  Rank Row Offset: 1

Export 

Literal 

Custom SQL 

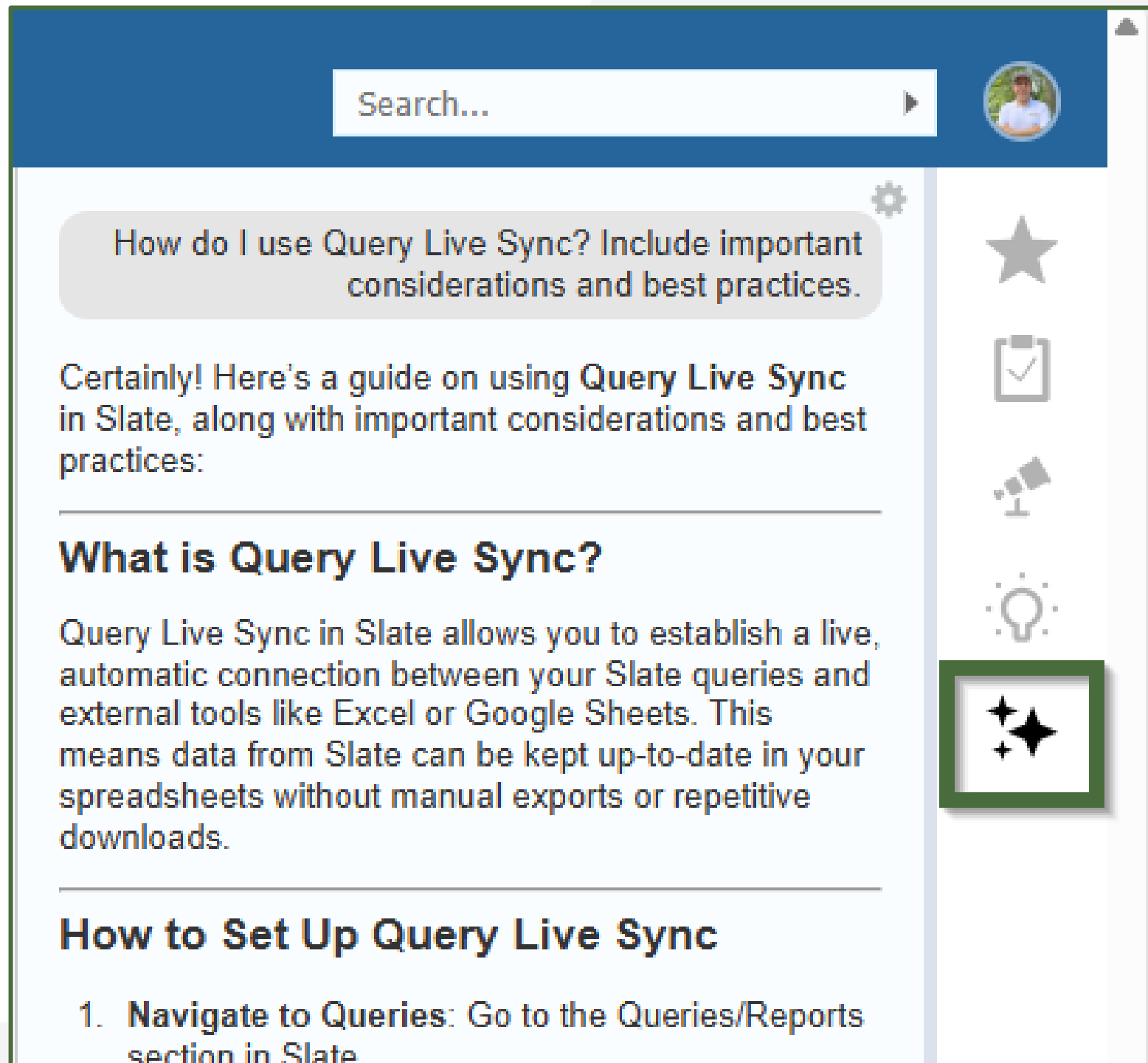
[Rename Exports](#)

- **Standard Fields (varies)**
- **Custom Fields (varies)**

Pro Tips:

- ✓ **Rename Exports**
- ✓ **Format Type and Masks (especially “Date/Time”)**
- ✓ **Creating Hyperlinks (especially “Date/Time”)**

Query Live Sync



🌟 Ask Slate AI

"How do I use Query Live Sync? Include important considerations and best practices."

Slate Knowledge Base › Excel and Google Sheets Live Sync

<https://knowledge.technolutions.net/docs/excel-and-google-sheets-live-sync>

Query Live Sync

On the Slate Side

Edit Query

Folder

User

Base

Execution Mode

Web Service

Operations

[Jon Rowland](#)

Configurable Joins - For

Retrieve all records each

[CSV / Google Sheets](#)

Edit Web Service

Custom Parameters

Service Type

CSV / Google Sheets

Edit Properties

Edit Permissions

Edit Web Service

Schedule Export

Preview Results

Display SQL

Snapshots

Copy

Edit Query

Folder

User

Base

Execution Mode

Web Service

Operations

[Jon Rowland](#)

Configurable Joins - For

Retrieve all records each

[CSV / Google Sheets](#)

Edit Grantee

Active

Active

Type

User Token

Name

Events Inventory Export

Token

4b641c58-b802-4e8e-8c91-0af156904b8d

[Reset Token](#)

Allowed Networks

Optionally restrict access to specific IP addresses or subnets. Enter individual IP addresses or CIDR subnets (e.g., 123.45.67.0/24) separated by commas. The IP address of your current machine is 185.223.152.98.

Permissions

☒ Web Service

Edit Properties

Edit Permissions

Edit Web Service

Schedule Export

Preview Results

Display SQL

Snapshots

Copy

Edit Query

Folder

User

Base

Execution Mode

Web Service

Operations

[Jon Rowland](#)

Configurable Joins - For

Retrieve all records each

[CSV / Google Sheets](#)

Web Service

Select a service account to display connection instructions. Use [Edit Permissions](#) to create a User Token and/or Username for secure web service access.

Service Account

User Token - Events Inventory Export

Authorization Type

Query String

URL

https://go.reworkflow.com/manage/query/run?id=...&cmd=service&output=csv&h=4b6...

Google Sheets Instructions: Import live data into Google Sheets by clicking into a cell and entering the formula =IMPORTDATA("...") where ... is the URL above.

Edit Properties

Edit Permissions

Edit Web Service

Schedule Export

Preview Results

Display SQL

Snapshots

Copy

Query Live Sync

On the Spreadsheet Side

	A	B	C	D	E	F	G	H	I	J	K	
1	Folder	Event Title	Event Type	Location	Start Date	Count Viewbooks	Count Finaid	Count PGBs	Count TPBs	Count Notepads	Count Pens	Cc
2	Academic Depts	2024 STEM Expo	On-Campus	Dr. Emmett Brown Science Center	5/28/2024	43	73	53	55	85	78	
3	Financial Aid	Financial Aid Workshop	On-Campus	Financial Aid Office	7/13/2024	48	13	32	98	60	38	
4	Athletics	2024 Athletic Recruitment Day	On-Campus	Seahawks Memorial Field	7/31/2024	21	43	88	58	27	66	
5	Recruitment	2024 Fall College Fair - New England	Off-Campus	U Mass, Boston	9/13/2024	36	18	21	39	67	91	
6	Open House	2024 Sept Open House	On-Campus	ReW Auditorium	9/16/2024	36	12	96	54	30	43	
7	Recruitment	2024 Fall College Fair - Texas	Off-Campus	Texas A&M, College Station	9/17/2024	48	6	75	17	16	68	
8	Recruitment	2024 Fall College Fair - California	Off-Campus	SDSU, San Diego	10/16/2024	14	93	78	5	50	81	
9	Student Life	Parent and Family Weekend	On-Campus	Multiple Locations	10/19/2024	61	92	97	7	71	14	
10	Recruitment	Counselor Breakfast	On-Campus	Marty McFly Student Center	10/24/2024	45	64	11	83	97	44	
11	Open House	2024 Oct Open House	On-Campus	ReW Auditorium	10/27/2024	95	40	62	93	67	5	
12	Student Life	Diversity and Inclusion Panel	On-Campus	Marty McFly Student Center	10/30/2024	80	55	40	32	85	34	
13	Open House	2024 Nov Open House	On-Campus	ReW Auditorium	11/9/2024	80	56	26	72	57	23	
14	Open House	2024 Dec Open House	On-Campus	ReW Auditorium	12/2/2024	5	2	26	19	58	41	
15	Student Life	First-Gen Student Panel	On-Campus	Marty McFly Student Center	12/7/2024	57	90	74	98	45	56	
16	Recruitment	Transfer Info Session	On-Campus	Marty McFly Student Center	1/25/2025	87	88	88	86	66	1	
17	Student Life	Student Life Showcase	On-Campus	Marty McFly Student Center	2/4/2025	32	65	75	3	48	80	
18	Off Campus Events	ReXplore Feb 2025	Off-Campus	ReW Auditorium	2/21/2025	60	19	90	8	48	32	
19	Recruitment	Counselor Breakfast	On-Campus	Marty McFly Student Center	3/26/2025	39	42	69	63	27	62	
20	Student Life	Diversity and Inclusion Panel	On-Campus	Marty McFly Student Center	3/28/2025	62	42	87	52	44	86	
21	Admitted Students	2024 Admitted Student Day	On-Campus	ReW Auditorium	4/10/2025	67	75	20	78	3	69	
22	Admitted Students	2025 Admitted Student Day	On-Campus	ReW Auditorium	4/15/2025	25	97	69	69	94	13	
23	Recruitment	Meet the Professors	On-Campus	Marty McFly Student Center	4/16/2025	52	76	10	93	67	12	
24	Academic Depts	2025 STEM Expo	On-Campus	Dr. Emmett Brown Science Center	5/9/2025	78	96	18	65	56	28	
25	Student Life	Veteran Services Info Night	On-Campus	Marty McFly Student Center	5/23/2025	47	54	12	1	85	38	
26	Student Life	Student Life Showcase	On-Campus	Marty McFly Student Center	5/25/2025	78	31	72	21	96	41	
27	Recruitment	2024 Fall College Fair - Florida	Off-Campus	University of Florida, Gainesville	5/26/2025	95	32	43	28	80	96	
28	Student Life	Student Life Showcase	On-Campus	Marty McFly Student Center	5/29/2025	77	57	41	87	8	18	
29	Recruitment	Counselor Breakfast	On-Campus	Marty McFly Student Center	6/9/2025	91	21	65	44	26	43	
30	Student Life	Student Life Showcase	On-Campus	Marty McFly Student Center	6/12/2025	3	82	64	29	15	100	
31	Athletics	2025 Athletic Recruitment Day	On-Campus	Seahawks Memorial Field	6/18/2025	50	10	90	28	80	34	
32	Recruitment	2024 Fall College Fair - WA	Off-Campus	University of Washington, Seattle	6/21/2025	70	35	37	65	58	57	

Benefits

- ✓ Collaboration (e.g. shared editing / commenting)
- ✓ Version history and backup capabilities
- ✓ Conditional formatting
- ✓ Advanced calculations & reporting features/tools
- ✓ External user instant access (i.e. no Slate login)
- ✓ Personal preferences

Limitations and Lessons Learned

⚠️ Limitations

- Not ideal for complex inventories or shipping orders
- Harder to integrate into broader Slate workflows
- No built-in alerts or automations
- Spreadsheets are less security than Slate

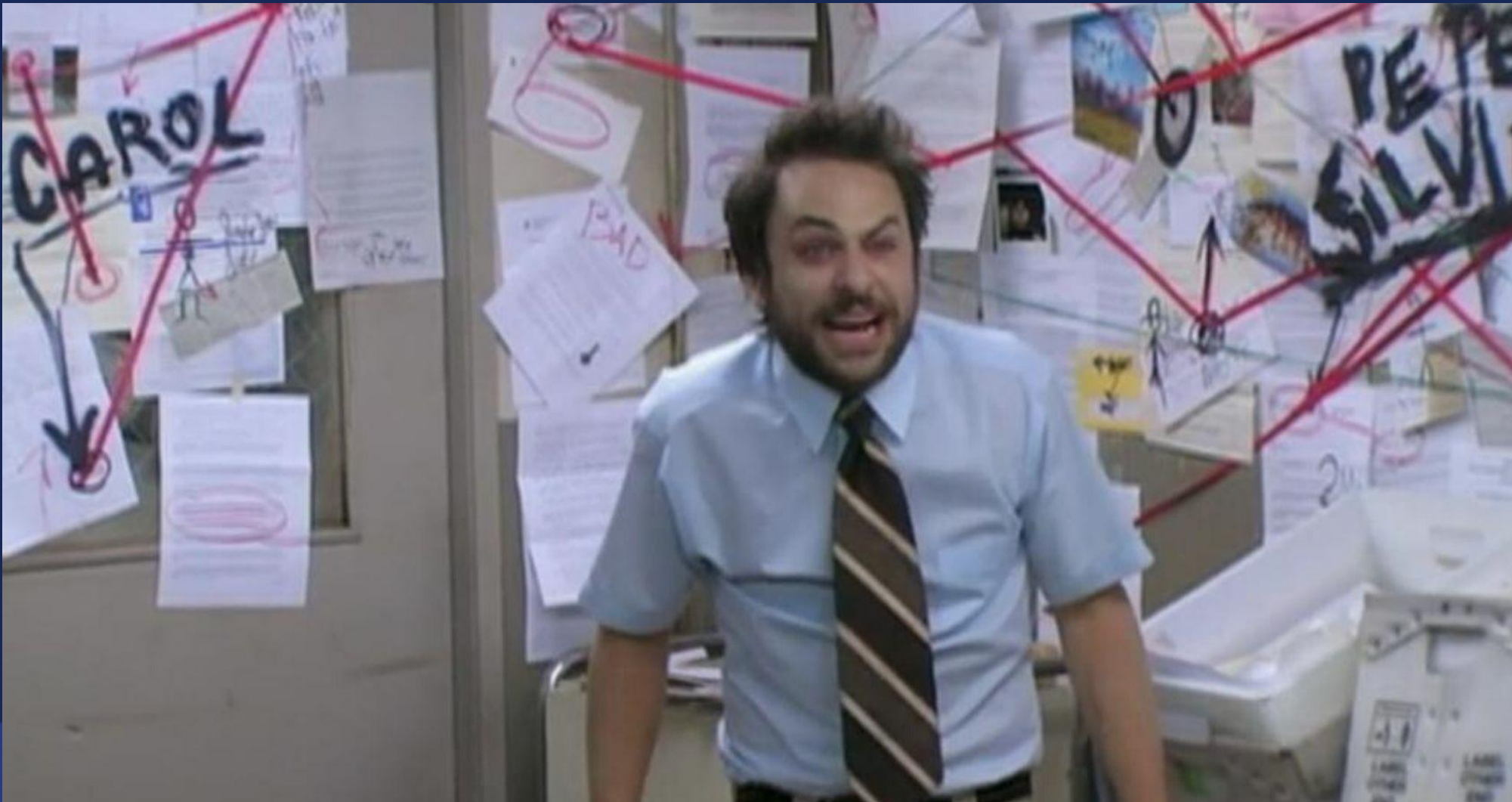
💡 Lessons

- Explaining the “Why” to help gain user buy-in
- User training and consistency is key
- Live Sync \neq Live Accuracy
- *“Perfection is the enemy of good”*

Now Let's Take it to the Next Level!



Why an Inventory Dataset?



Wanted to replace tangled web of Qualtrics forms, a giant spreadsheet, Post-It notes, frantic emails/calls to reorder

Why an Inventory Dataset?



Business process changes:

- More tightly controlled inventory storage
- accessible by inventory manager
- Bring out materials to fill requests as needed

Inventory as a Beginner Dataset



Advantage: it's self-contained

You can focus on it as a process separate from collecting and processing student data

Easier to “dual track” with existing process, or to try and start over if necessary

Creating a Custom Dataset



Follow the 5 Steps:

1. Create the dataset
2. Create custom fields and prompts
3. Refresh the quartet
4. Create a new record form
5. Create a display name rule

KB Article: [Creating a Custom Dataset](#)

Creating a Custom Dataset

Updated 27 Mar 2025 • 11 minute read

Print Share Dark PDF

Custom datasets are useful for storing data as you would on a person record, but for a different type of object or constituency not included among [standard datasets](#) in Slate.

True to their name, custom datasets are **entirely custom**: many of the features taken for granted on the person record ***must be built from scratch in a custom dataset to achieve baseline functionality***. These include: Display name, matching criteria, Lookup, and the "Create a New Record" form.

Before jumping into a custom dataset, [familiarize yourself with the general principles of datasets](#). Your goal might be achievable with a Slate feature that requires a smaller commitment.

✦ **Tip:** Start a conversation in the [Community Forums](#) to find the right case for a custom dataset.

Five steps required to create a custom dataset

To make a custom dataset, you'll do the following:

Add a Type!



Minor point – don't skip adding a Type to your dataset

Edit Record in Datasets

ID	fa3b7c3d-53b8-4142-9435-abf5ebc8099d
Status	Active
Folder	
Name	Inventory
Type	item
Parent	
Custom Icon	Office Building

Entities as “ledgers”



3 Entities for recording transactional data

Orders – counts materials ordered from a supplier

Requests – counts materials requested from staff across campus

Returns – counts materials not used by staff and returned to inventory

Each item has in effect its own set of ledgers

Where to start?



Highly recommend looking at existing materials you want to keep track of

It's OK to *start* with a spreadsheet

Catalog the different properties you want to note about each

Breaking it down



- Began with a master spreadsheet of all items
- Columns for key properties like type, reorder threshold, contact for reorder
- Color coded for categories

1	Item Type	Year	Location	Request Required	Reorder Trigger	Supplier	Contact for reorder Name and Email	Use Case	Color Code
2	Admit Folder	2023-2024	Closet #3	Yes	5,000	DCM	Alexis Bestwick amp8888@ksu.edu	Both	Semester Specific
3	Affordability Booklet (Financial Aid Guide)	2023-2024	Closet #3	Yes	5,000	DCM	Alexis Bestwick amp8888@ksu.edu	Both	Year Specific
4	Branded Poster		Closet #3	ORA Only	500	DCM	Alexis Bestwick amp8888@ksu.edu	Internal	Ongoing Use - began in specific year
5	Business Cards		Closet #1	Yes	500	University Printing	Courtney H.	Both	Evergreen
6	Die-Cuts	2023-2024	Closet #3	ORA Only	1,000	DCM	Alexis Bestwick amp8888@ksu.edu	Internal	
7	Domestic Road Piece	2023-2024	Closet #3	Yes	5,000	DCM	Alexis Bestwick amp8888@ksu.edu	Both	
8	First Year Information Request Cards		Closet #3	Yes	1,000	DCM	Alexis Bestwick amp8888@ksu.edu	Both	
9	Folded Note Cards/Postcards		Closet #1	ORA Only	250	DCM	Alexis Bestwick amp8888@ksu.edu	Internal	
10	Inquiry Folder	2023-2024	Closet #3	Yes	5,000	DCM	Alexis Bestwick amp8888@ksu.edu	Both	
11	International Road Piece	2022-2024	Closet #3	Yes	2,500	DCM	Alexis Bestwick amp8888@ksu.edu	Both	
12	KS Scholarship Sheets	2023-2024	Closet #3	ORA Only	100	DCM	Alexis Bestwick amp8888@ksu.edu	Both	
13	Lanyards		Closet #1	ORA Only	N/A	Scoby Brothers	Courtney H.	Internal	
14	Manhattan Visitor Guide	2023-2024	Closet #3	Yes	1,000	City of Manhattan		Both	

Dataset Record



Naming conventions

Do you differentiate based on season, year, staff member?

Fall Events Brochure

2025-2026 Financial Aid Guide

Eric Hoffpauir Business Cards

Pens

Name comes from gluing together different elements, depending on type
(Done in the Record Creation Form)

Dataset Record



Static information about the item

- Name
- Storage Location
- Usage (Admissions Only, Campus Partners, or Both)
- Supplier Contact (who should reorder this when quantities are low?)

Dataset Record - Dashboard



Self-guided Campus Tour Sheet

Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns
-----------	----------	---------	-----------	---------	--------	----------	---------

Item Dashboard

Estimated Remaining Count: 3623

Last Request Date: 12/07/24 03:56 PM

Last Order Date: 04/28/25 05:30 PM

Location: Berney Closet #1

Dataset Record - Dashboard



Estimated Remaining Count: {{count}}

Last Request Date: {{last_request_date}}

Last Order Date: {{last_order_date}}

Location: {{location}}

{% if {{has_im_role}}...

Supplier: {{supplier}}

Supplier Contact: {{supplier_contact}}

Supplier Email: {{supplier_contact_mail}}

Supplier Phone: {{supplier_contact_phone}}

{% endif %}

Dataset Record



Self-guided Campus Tour Sheet

Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns
<p>For Use By: Both</p> <p>Item Location Berney Closet #1</p> <p>Standard Reorder Amount 3000</p> <p>Order Threshold <i>An amount below this number will trigger an email to reorder.</i> 1000</p> <p>Supplier DCM</p> <p>Supplier Contact Kim Schurle, Kevin Chrisjohn, Rachel Sielaff</p> <p>Supplier Contact Email kheller@ksu.edu, kpchrisjohn@ksu.edu, rsielaff@ksu.edu</p> <p>Supplier Contact Phone</p> <p>Edit</p>							

How to Count?



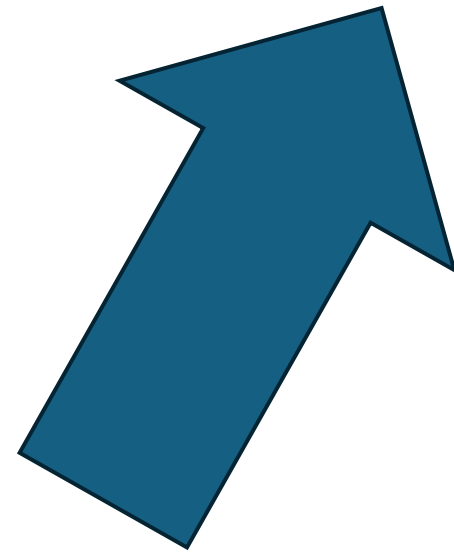
Entities vs Amount Field

Wanted to be able to store more transactional information than adding or subtracting an amount

Self-guided Campus Tour Sheet							
Self-guided Campus							
Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns
Amount Requested	Created Date	Needed by Date	Address Note	Delivery Address	Status	Requester	Ticket Number
Add New							
60	06/04/24 05:25 PM	06/06/24		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Maddi Gage	102
300	03/24/25 09:12 AM	03/24/25		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Holly Gerke	340
642	05/22/24 12:32 PM	05/24/24		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Emme Mount	25
10	06/07/24 09:14 AM	06/14/24	(please send through campus mail)	122 Anderson Hall Manhattan KS 66506	Requested	Sonya Paph	133
500	04/03/25 03:45 PM	04/04/25		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Emme Mount	422

Each Inventory Item

Orders



Requests



Returns



Entities



1. Orders – counts materials ordered from a supplier
2. Requests – counts materials requested from staff across campus
3. Returns – counts materials not used by staff and returned to inventory

Tabs on Record contain Entity Widgets

Orders



- How many?
- Order Status
- Cost
- Calculated price per item

Self-guided Campus Tour Sheet

Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns	
Order Date	Amount Ordered		Delivered Date		Order Status	Order Note	Item Cost	Cost Per Item
Add New								
11/27/24 09:08 AM	3000		11/26/24 12:00 AM		Received			\$0.00
02/28/25 04:17 PM	3000		02/28/25 12:00 AM		Received			\$0.00
10/02/24 10:38 AM	3000		10/02/24 12:00 AM		Received			\$0.00
04/28/25 05:30 PM	3000		04/28/25 12:00 AM		Received			\$0.00
05/07/24 02:18 PM	13470				Received			\$0.00




Orders – Entity Widget Form



Edit Properties

Custom List Fields

Exports

 Export  

Order Date

Amount Ordered

Delivered Date

Order Status

Order Note

Item Cost

Cost Per Item

[All Forms](#) > [Widget: Item Order](#)

Edit Form

Folder

Custom Datasets / Inventory

Scope

Entity Widget - Item Orders

Amount Ordered

Delivered Date

Item Cost

Cost Per Item

Order Status

Order Note

Requests

- How many?
- Who needs it?
- Where to deliver? (Entity-scoped custom address fields – no block)
- When is it needed by?

Self-guided Campus Tour Sheet

Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns
Amount Requested	Created Date	Needed by Date	Address Note	Delivery Address	Status	Requester	Ticket Number
Add New							
60	06/04/24 05:25 PM	06/06/24		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Maddi Gage	102
300	03/24/25 09:12 AM	03/24/25		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Holly Gerke	340
642	05/22/24 12:32 PM	05/24/24		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Emme Mount	25
10	06/07/24 09:14 AM	06/14/24	(please send through campus mail)	122 Anderson Hall Manhattan KS 66506	Requested	Sonya Paph	133
500	04/03/25 03:45 PM	04/04/25		705 N Martin Luther King Jr Dr Manhattan KS 66506	Requested	Emme Mount	422

Self-guided Campu

Requests – Entity Widget Form



[All Forms](#) > [Widget: Item Request](#)

Edit Form

Folder




Custom Datasets / Inventory

Scope

Entity Widget - Item Requests

Custom List Fields

Exports

 Export  

Amount Requested

Created Date

Needed by Date

Address Note

Delivery Address 

Status

Requester

Ticket Number

Save

Cancel

Status

Requester

Amount Requested

Need it by:

Delivery Note

Street Address

City

State

ZIP Code

Country

Address Note

Requests – Entity Widget Form



Delivery Address is a concatenation of all the custom entity-scoped address fields

Edit Part

Status

Active

Name

Delivery Address

Source

Subquery Export

Type

Dependent subquery

Output

Concatenate

Row Separator

\n = New Line; \t = Tab; \\ = Escaped Backslash

Row Offset

1

Row Limit

Export Separator

Exports

Export

Item Requests Request Street

Item Requests Request City

Item Requests Request State

Item Requests Request Postal

Item Requests Request Country

Returns

- How many?
- Who?
- When?



Dashboard	Timeline	Profile	Materials	Details	Orders	Requests	Returns
Amount Returned					Return Date		Returner
Add New							
16					08/09/24 05:26 PM		ralvarado
180					02/11/25 12:03 PM		dylanh02
260					04/04/25 02:46 PM		emmem
198					05/02/25 02:52 PM		gerke

Set Default Tab

Returns – Entity Widget Form



Edit Properties

General	Merge Fields	Widget Settings
Scope	Entity Widget	
Entity	Item Returns	
Layout	Stacked (default)	
Export Value		

Custom List Fields

Exports	<div>Export</div>
Amount Returned	
Return Date	
Returner	

[All Forms](#) > [Widget: Item Return](#)

Edit Form

Folder	Custom Datasets / Inventory
Scope	Entity Widget - Item Returns
Amount Returned	
Returner	

Estimated Remaining Count



Subquery Export!

Sum of Orders
– Sum of Requests
+ Sum of Returns

Count

Edit Part

StatusActive

Namecount

SourceSubquery Export

TypeDependent subquery

OutputFormula

Row Offset1Row Limit

Formula@orders + @returns - @requests

Exports

Export

orders

requests

returns

Estimated Remaining Count



Orders

- Subquery export
- Join to Orders
- Aggregate = Sum
- Amount Ordered
- Filtered for Received








Status	Active
Name	orders
Source	Nested Subquery Export / count
Type	Dependent subquery
Output	Aggregate
Aggregate	Sum
Format Mask	
Exports	<div>Export</div> <div>Item Orders Amount Ordered</div>
Filters	<div><div>Filter</div><div>NOT</div><div>(</div><div>OR</div><div>)</div><div>Join</div></div> <div>Join Item Orders</div> <div>Item Orders / Order Status IN Received</div>

Estimated Remaining Count



Requests

- Subquery export
- Join to Requests
- Aggregate = Sum
- Amount Requested
- #Nofilter







Status	Active ▾
Name	requests
Source	Nested Subquery Export / count
Type	Dependent subquery ▾
Output	Aggregate ▾
Aggregate	Sum ▾
Format Mask	
Exports	 Export  
	Item Requests Amount Requested
Filters	 Filter  NOT (OR)  Join 
	Join Item Requests

Estimated Remaining Count



Requests

- Subquery export
- Join to Returns
- Aggregate = Sum
- Amount Requested
- #Nofilter

Status	Active ▾
Name	returns
Source	Nested Subquery Export / count
Type	Dependent subquery ▾
Output	Aggregate ▾
Aggregate	Sum ▾
Format Mask	
Exports	<div>Export  </div> <div>Item Returns Amount Returned</div>
Filters	<div> Filter  NOT (OR)  Join </div> <div>Join Item Returns</div>

Forms, Forms, Forms

- Record Creation Form
- Order Form
- Request Form
- Return Form

- Ticket Forms

Record Creation Form



Item Creation Form

Use this form to add a new item to the inventory. If it's an existing item, do NOT use this form to order more. Use the order form to do that!

Is there an item type in the drop down for the item you want?

- ☐ Yes
- ☐ No

Item Location

Where will this item be used? Internally within ORA, externally for campus partners, or both?

Would you like to add supplier information?

- ☐ Yes
- ☐ No

Would you like to record an initial order amount?

- ☐ Yes
- ☐ No





Item Name (no type)

Record Creation Form



- Necessary information like storage location, supplier, who should have access, etc.
- Lots of conditional logic to generate name

Export Key	sys:name		
Data Type	Text/Unspecified ▾		
Size	Width: 48		
Format Mask			
Maximum Counts	Characters: <input type="text"/>	Words: <input type="text"/>	Display: Do not display ▾
Minimum Counts	Characters: <input type="text"/>	Words: <input type="text"/>	Display: Do not display ▾
Calculation Formula	@sys:field:item_year_text + ' ' + @sys:field:item_type_text		

 Filter  NOT (OR)  Join 

Field:Item_Type IN Affordability Booklet (Financial Aid Guide), Die-Cuts, Domestic Road Piece, Inquiry Folder, International Ro...

Record Creation Form

Look at all the possible variations of names!

Item Name (no type)	
Item Key (no type)	
Item Name (year)	
Item Key (year)	
Item Name (business cards)	
Item Key (business cards)	
Item Name (postcards)	
Item Key (postcards)	
Item Name (stickers)	
Item Key (stickers)	
Item Key (envelopes)	
Item Name (envelopes)	
Item Name (evergreen)	
Item Key (evergreen)	

Request Form – Registration Blocks



Registration Blocks can allow multiple form responses to be made from a single form submission.

Edit Field

Status

Active

Type

Section Break

Script Key

Default Value Formula

Column Width

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

Layout

Default

Replicate

Registration Block

Registration Title

Insert Label

Registration Label

Registration Limit

Registration Minimum

Conditional Logic Filters

Filters

Filter

NOT

(

OR

)

Request Form – Registration Blocks



Fields outside the registration block (like requester name, department) take in information that applies to all registrations in that submission.

Requests made within 10 business days of the requested date may not be completed by the desired date.

Due to the University being closed for fall break, we will not be processing material requests at this time. Once staff have returned, we will process requests by date they are needed.

Please fill this out fully for each order. If you need a set of folders stuffed with materials, please request all items using this form submission, adding each item needed for a request up to 10 items, before you click the Submit button.

You may complete a separate form submission if you have any additional separate requests.

Requester Name

Requester Email

Requester Department

What other department are you requesting for?

Request Name

For reference, describe what this is for. This will help later when you refer back to your ticket.

Need it by:

Again, requests made within 10 business days of the requested date may not be completed by the desired date!!!

Request Form – Registration Blocks



Fields inside the registration block take information specific to each individual request (like name and quantity.)

Request Items

Set Request Status as Requested (hidden)

What can you request?

Item Name
You must pick from the autosuggest list!
Only one item at a time, please. Email Amanda Chance if you do not see what you are needing.

Item Key

Item Name
Make sure you pick from the autosuggest list.

Item Key

YOU MUST PICK SOMETHING FROM THE AUTOSUGGEST LIST.
Start typing in the Item Name field and select the item from the list. If the item you are looking for is not on the list, it is out of stock or unavailable.

hidden name calc

{{'Branded Poster' | block: "item_images"}}

Amount Requested

Special Instructions

Ticket Number

Ticket Number RDR

Request Form



Outside the Registration Block

- Requester
- Requester department
- Requester Email
- Request Name – short description to help processing
- Need it by date – instruction blocks to warn staff if date was too close
- Delivery Address – one block was hard coded to the welcome center address

Request Form

Inside the registration block

Records particulars for each request

Request Items

Set Request Status as Requested (hidden)

What can you request?

Item Name

You must pick from the autosuggest list!

Only one item at a time, please. Email Amanda Chance if you do not see what you are needing.

Item Key

Item Name

Make sure you pick from the autosuggest list.

Item Key

YOU MUST PICK SOMETHING FROM THE AUTOSUGGEST LIST.

Start typing in the Item Name field and select the item from the list. If the item you are looking for is not on the list, it is out of stock or unavailable.

hidden name calc

{{'Branded Poster' | block: "item_images"}}

Amount Requested

Special Instructions

Ticket Number

Ticket Number RDR

Request Form



- Help-text for current items available for request
- Item name and (hidden) key
- Amount requested
- 2 different selections for item name and key, depending on department
- Population aware autosuggest

Population-aware Autosuggest



- First assign records to a population
- Note Population GUID
- Use population GUID in autosuggest code
- Both name and key fields

More details with [Get Inspired!](#)

You must pick from the autosuggest list!
Only one item at a time please. Email Amanda Chance if you do not see what you are needing.

☐ Hide Label

Holder Text: Start typing to find your item

Item Field: Record Name

Item Key: sys:name

Type: Text/Unspecified

Width: 48

At Mask:

Num Counts: Characters: Words: Display: Do not display

Num Counts: Characters: Words: Display: Do not display

lation Formula:

-suggest: Other suggest,item/name,p:64c554fb-f2ee-4472

ult Value Formula: ☐

ult Value:

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

suggest, [Dataset Type]/name,p:[Population GUID]
suggest, [Dataset Type]/key,p:[Population GUID]

Tickets



- Added a ticket number Related Dataset Row field (# of Registrants + 1)
- Provides link between Inventory Dataset and Ticket Dataset
- Allows Requests to be grouped together

Ticket Number

Ticket Number RDR

Ticket Number Key

NEVER EVER EDIT THE REQUEST REGISTRATION OR BAD THINGS WILL HAPPEN!

Another dataset?!?



Ticket Dataset with name, key, and status (Requested, Ready to Fill, Shipped)

Pre-created 3000 ticket dataset records, and set a reminder message to add more once 2900 had been used.

Ticket Number

Ticket Number RDR

Ticket Number Key

NEVER EVER EDIT THE REQUEST REGISTRATION OR BAD THINGS WILL HAPPEN!

Forms, Forms, Forms



Order Form – select name, quantity, delivered date, price, status

Return Form – select name, quantity, status

Order Form

Made this a registration block to record multiple orders quickly

Form: Item Order



Item Order

New Order 1

Item Name

Amount Ordered

Order Status

Delivered Date

Item Cost

Cost Per Item

Order Note

[Click here to add another order](#)

Return Form



Made this one super simple

[All Forms](#) > [Form: Item Return](#)

Edit Form

Folder	Custom Datasets / Inventory
Scope	Dataset - Inventory

Item Name

Item Key

Amount Returning

Returned by

▼

Form: Item Return

Item Name

Item Key

Amount Returning

Returned by

▼

Submit

How to Process Requests



Staff member reviews a report to get totals for each item for all upcoming requests

Pulls quantities from the inventory closet

Then clicks each line item to drill down for totals for each ticket

They can assemble stacks for each ticket

Separate query pulls name and delivery address for each filled ticket

Inventory Processing Report



Metric	In Closet	Staged	Filled	Total
Requested in Last 10 Days / Item Requests Ticket Number				
2024-2025 Domestic Road Pie...			100	100
547			100	100
2024-2025 Spanish Affordablit...			1	1
544			1	1
2024-2025 Spanish Roadpiece...			1	1
544			1	1
4x6 ORA return address envel...				500
Anderson Sunrise - Folded No...				100
Good to be a Wildcat - Folded...				200
K-State Alumni Buttons			50	50
Manhattan Apple Stickers				250
Notepads			100	100
547			100	100
Done			100	100

Ticket Staging



Ticket Staging

By clicking submit, you will be marking the tickets that you've entered as filled and shipped.

Student help needed to fill? Use this form submission to mark all tickets that require student help.

- ☐ Yes
- ☐ No

Tickets ready to be filled

Ready 1

Ticket Number

Requester

[Mark another ticket ready](#)

Ticket Completion Form



By clicking submit, you will be marking the tickets that you've entered as complete.

Ticket Number

Edit Form

Scope

Dataset - Item Ticket

Status (hidden)

By clicking submit, you will be marking the tickets that you've entered as complete.

Ticket Number

Ticket Key (hidden)

Inventory Processing Report



Report is Item Requests Entity base

Filtering on requests that are needed by the next 10 days

[All Reports](#) > [Inventory Processing Report](#) > [Edit Report](#)

Requests This Week

StatusActive

TypeData/Charts

BaseItem Requests

FiltersNumbers match this week

Columns

In Closet

Staged

Edit Part

StatusActive

NameRequests This Week

BaseItem Requests

Exports

Export

Matching Rows6

Filters

FilterNOT(OR)

Numbers match this week

72

Inventory Processing Report



[All Reports](#) > [Inventory Processing Report](#) > [Edit Report](#)

Requests This Week

Status: Active
Type: Data/Charts
Base: Item Requests
Filters: [Numbers match this week](#)

Columns

In Closet	Staged	Filled	Total
-----------	--------	--------	-------

Rows

Metric	In Closet	Staged	Filled	Total
Requested in Last 10 Days				
4x6 ORA return address envelopes ...			500	500
Anderson Sunrise - Folded Notecard			100	100
Good to be a Wildcat - Folded Notec...			200	200
Manhattan Apple Stickers			250	250
Devonport Stickers			500	500

Four columns

- 1. Amount in closet
- 2. Staged
- 3. Filled Requests
- 4. Total

In Closet



[All Reports](#) > [Inventory Processing](#)

Requests This Week

Status

Type

Base

Filters

Columns

In Closet

Active

Data

Item

Num

Edit Column

Name

In Closet

Type

Population ▾

Column Group

Column Width

e.g., 150px, 25%

Column Alignment

Left ▾

Variable Name

@in

e.g., @applicants

Filters

Matching Rows

0

Filters

Filter

NOT

(

OR

)

Join

In Closet

Subquery Filter

74

In Closet



[All Reports](#) > [Inventory Processing Report](#) > [Edit Report](#)

Requests This Week

StatusActive

TypeData/Charts

BaseItem Requests

FiltersNumbers match this week

Columns

In Closet

Staged

Rows

MetricIn Closet

Requested in Last 10 Days

StatusActive

NameIn Closet

Source

TypeDependent subquery

AggregateComparison

Field 1Item Requests Ticket Number

Operator=

Field 2Ticket Request RDR - Item Ticket Name

Exports

Export

Filters

Join Ticket Request RDR - Item Ticket Ticket Request RDR - Item Ticket / Ticket Status IN Requested

Subquery Filter

Comparison matches the Ticket Number to Related Dataset Row Ticket Name

Filtered on Ticket Status = Requested

Staged



[Processing Report](#) > [Edit Report](#)

Week

Active

Data/Charts

Item Requests

Numbers match this week

Staged

Edit Column

Name	Staged
Type	Population ▾
Column Group	
Column Width	<input type="text"/> e.g., 150px, 25%
Column Alignment	Left ▾
Variable Name	@out

Filters

Matching Rows	0
Filters	<div><div>Filter</div><div><div></div></div><div>NOT</div><div>(</div><div>OR</div><div>)</div><div>numbers match</div><div><div></div></div></div>

Subquery Filter

Staged



Status

Active ▾

Name

numbers match

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Comparison ▾

Field 1

Ticket Request RDR - Item Ticket Name ▾

Operator

= ▾

Field 2

Item Requests Ticket Number ▾

Exports

Export

Item Requests Ticket Number

Ticket Request RDR - Item Ticket Name

Filters

Filter

NOT

(

OR

)

Join

Join

Ticket Request RDR - Item Ticket

Ticket Request RDR - Item Ticket / Ticket Status

IN Ready to Fill

Subquery Filter

Comparison matches
the Ticket Number to
Related Dataset Row
Ticket Name

Filtered on Ticket Status
= Requested

Staged



Edit Report

is week

Filled

Edit Column

NameFilled

TypePopulation ▾

Column Group

Column Widthe.g., 150px, 25%

Column AlignmentLeft ▾

Variable Name@fillede.g., @applicants

Filters

Matching Rows1,602

Filters

Filter

NOT

(

OR

)

Join

shipped

Subquery Filter

Staged



Edit Part

Status

Active

Name

shipped

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Comparison

Field 1

Item Requests Ticket Number

Operator

=

Field 2

Ticket Request RDR - Item Ticket Name

Exports

Export

Ticket Request RDR - Item Ticket Name

Item Requests Ticket Number

Filters

Filter

NOT

(

OR

)

Join

Join Ticket Request RDR - Item Ticket

Ticket Request RDR - Item Ticket / Ticket Status IN Shipped

Subquery Filter

Comparison matches
the Ticket Number to
Related Dataset Row
Ticket Name

Filtered on Ticket Status
= Shipped

Rows



Columns

In Closet

Staged

Rows

Metric

Requested in Last 10 Days

4x6 ORA return address envelopes ...

Anderson Sunrise - Folded Notecard

Good to be a Wildcat - Folded Notec...

Manhattan Apple Stickers

Powercat Stickers

SJ Gardner Business Cards

Edit Part

Type

Data Table ▾

Heading

Requested in Last 10 Days

Row Type

Aggregate ▾

Function

Sum ▾

Number Format

#

Variable Name

e.g., @applicants

Group By

Exports

Export

Join

Join

Inventory

Inventory Name

Item Requests Ticket Number

Value

Exports

Export

Join

Item Requests Amount Requested

Data Table

Row Type = Aggregate
Function = Sum

Group by – Join to Inventory,
Export - Name and Item
Request Ticket Number

Value – Item Requests Amount
Requested

Inventory Processing Report



Metric	In Closet	Staged	Filled	Total
Requested in Last 10 Days / Item Requests Ticket Number				
2024-2025 Domestic Road Pie...			100	100
547			100	100
2024-2025 Spanish Affordablit...			1	1
544			1	1
2024-2025 Spanish Roadpiece...			1	1
544			1	1
4x6 ORA return address envel...				500
Anderson Sunrise - Folded No...				100
Good to be a Wildcat - Folded...				200
K-State Alumni Buttons			50	50
Manhattan Apple Stickers				250
Notepads			100	100
547			100	100
Done			100	100

Basic report on current quantities in stock



Basic report on current quantities in stock

Simple name and Remaining Count

Great place to spot possible duplicates!

Inventory Overview

Folder EM
Current as of 05/22/2025 at 02:40:34 PM ET
Status Completed successfully.


Metric	Remaining
"I know a Spot" 4x6 Postcards	2904
10x13 ORA return address Envelopes	1438
2023-2024 Admit Folder	3893
2023-2024 Affordability Booklet (Financial Aid Guide)	2828
2023-2024 Die-Cuts	613
2023-2024 Domestic Road Piece	2172
2023-2024 Inquiry Folder	1713
2023-2024 International Road Piece	
2023-2024 KS Scholarship Sheets	
2023-2024 Manhattan Visitor Guide	3517
2023-2024 MO Scholarship Sheets	270

Reorder Notices

- Weekly Mailing
- User scoped recipient list query
- Filters – independent subquery comparing if supplier email addresses match user email address
- Only for active dataset records whose quantity remaining below set threshold
- Exports: user mail
 - dictionary export of all items matched to that user
 - quantity
 - usual order amount (if exists)

Example Reorder Message



Sender "Kansas State University" <events@ksu.edu>
Recipient challen@ksu.edu 
CC emmem@ksu.edu, borgmanh@ksu.edu, archance@ksu.edu
Subject Reorder Needed
Preheader

Courtney,

The following items are running low in our inventory. Please reorder them as soon as possible and let Amanda know when you have reordered.

- Powercat Cup - current count: 40, standard reorder amt:
- School Visit Keychain - current count: 45, standard reorder amt:

This email was sent to challen@ksu.edu by "Kansas State University" <events@ksu.edu>.
[Unsubscribe](#) from Kansas State University.

Reorder Mailing Filters

3 different filters to account for multiple reorder contacts

I know – the ORs!



Item Reorder Reminder

Method

Email

Folder

User

Eric Hoffpauir

Realm

EM Deliver

Recipient Lists

Reorder Please Mailing

user email matches too low item contact

OR

user email 2 matches too low item contact

OR




user email 3 matches too low item contact

Reorder Mailing Filters



Independent Subquery

- Inventory Base
- Comparison between User email and subquery export for an email contact










Status	Active ▾
Name	user email matches too low item contact
Source	Subquery Filter
Type	Independent subquery ▾
Category	Records ▾
Base	Inventory ▾
Aggregate	Comparison ▾
Field 1	email for items too low ▾
Operator	= ▾
Field 2	User Email ▾
Exports	<div>Export  </div> <div>User Email</div> <div>email for items too low </div>

Reorder Mailing Filters

“email too low” export

- Filters for active items with counts below the stated threshold
- Exports the first of the email addresses

Edit Filter

Status	Active ▾
Name	email for items too low
Source	Nested Subquery Export / user email matches too low item contact
Type	Dependent subquery ▾
Output	Rank ▾
Row Offset	1
Exports	 Export  
	email 1 
Filters	 Filter  NOT (OR)  Join 
	item below threshold 
	Inventory (independent subquery) / Active Status = Active




Reorder Mailing Filters



“email 1” export

- Uses Split output
- Export Separator = ,
- Offset = 1
- Exports the email address before the comma if multiple addresses are listed in contact email

Edit Part ✕

Status	<div>Active ▼</div>		
Name	<div>email 1</div>		
Source	<div>Nested Subquery Export / email for items too low / user email matches too low item contact</div>		
Type	<div>Dependent subquery ▼</div>		
Output	<div>Split ▼</div>		
Row Offset	<div>1</div>		
Export Separator	<div>,</div>	Offset	<div>1</div>
Exports	<div><div> Export  </div><div>Inventory (independent subquery) Supplier Contact Email</div></div>		

Reorder Mailing Filters



Item below threshold

- Comparison between count subquery export and static number in threshold field

Status	Active ▾
Name	item below threshold
Source	Nested Subquery Filter / email for items too low / user email matches too low item contact
Type	Dependent subquery ▾
Aggregate	Comparison ▾
Field 1	Inventory (independent subquery) Estimated Remaining Count ▾
Operator	<= ▾
Field 2	Inventory (independent subquery) Item Threshold ▾
Exports	<div><div><div><div></div></div><div>Export</div></div><div><div></div></div><div><div></div></div></div> <div>Inventory (independent subquery) Estimated Remaining Count <div></div></div> <div>Inventory (independent subquery) Item Threshold</div>

Reorder Mailing Filters



Item below threshold

- Again, count is:

Orders – Requests + Returns

Status	Active		
Name	Inventory (independent subquery) Estimated Remaining Count		
Source	Nested Subquery Export / Inventory (independent subquery) / item below threshold / email for items too low / user email matches too low Item contact		
Type	Dependent subquery		
Output	Formula		
Row Offset	1	Row Limit	
Formula	@orders + @returns - @requests		
Exports	<div>Export</div> <div>orders</div> <div>requests</div> <div>returns</div>		

Reorder Mailing Filters

To get user email 2, copy the first filter and change the offset in your Split export.



Item Reorder Reminder

Method	Email
Folder	
User	Eric Hoffpauir
Realm	EM Deliver
Recipient Lists	Reorder Please Mailing user email matches too low item contact OR user email 2 matches too low item contact OR user email 3 matches too low item contact

Reorder Mailing Filters



“email 2” export

- Uses Split output
- Export Separator = ,
- Offset = 2
- Exports the second email if multiple addresses are listed in contact email

Edit Part ✕

Status	Active ▼		
Name	email 2		
Source	Nested Subquery Export / email for items too low / user email 2 matches too low item contact		
Type	Dependent subquery ▼		
Output	Split ▼		
Row Offset	1		
Export Separator	,	Offset	2
Exports	Export ↔ T		
	Inventory (independent subquery) Supplier Contact Email		

Reorder Mailing Exports



4 Exports

1. Email – user needing to reorder
2. User First Name
3. Dictionary – to loop item name, count, and standard reorder amount
([Read KB for more on liquid looping!](#))
4. Manager Email – to cc in staff with inventory manager role

Reorder Mailing Export - Dictionary



Simple name = items

- Name (of item)
 - Count
 - Standard Reorder Amount
-
- Filters on count being too low




Status	Active		
Name	items		
Source	Subquery Export		
Type	Independent subquery		
Category	Records		
Base	Inventory		
Output	Dictionary		
Row Offset	1	Row Limit	
Exports	<div>Export</div>		
	name		
	count		
	reorder		
Matching Rows	2		
Filters	<div>Preview Results</div> <div>count low</div>		

Reorder Mailing Export - email



User Email export

Filter to make sure there's an item with a low count

Status	Active ▾
Name	email
Source	Subquery Export
Type	Independent subquery ▾
Category	Records ▾
Base	Inventory ▾
Output	Rank ▾
Row Offset	1
Exports	<div>Export  </div> <div>User Email</div>
Matching Rows	2 Preview Results
Filters	<div>count low </div>

Reorder Mailing Export - Dictionary



Count low filter

Compares static amount in threshold field to estimated remaining count

Additional nested filter to make sure low count matches to a contac email

Status	Active
Name	count low
Source	Nested Subquery Filter / Items
Type	Dependent subquery
Aggregate	Comparison
Field 1	Inventory (independent subquery) Item Threshold
Operator	>=
Field 2	Inventory (independent subquery) Estimated Remaining Count
Exports	<div>Export</div> <div>Inventory (independent subquery) Item Threshold</div> <div>Inventory (independent subquery) Estimated Remaining Count</div>
Filters	<div>Filter NOT (OR) Join</div> <div>Inventory (independent subquery) / Active Status = Active</div> <div>(</div> <div>email 1 match</div>

Reorder Mailing Export – Manager Email



Concatenates all users with the Inventor Manager role

Name	<input type="text" value="manager_email"/>		
Source	Subquery Export		
Type	<input type="text" value="Independent subquery"/>		
Category	<input type="text" value="Related"/>		
Base	<input type="text" value="User"/>		
Output	<input type="text" value="Concatenate"/>		
Row Separator	<input type="text" value=","/> <small>\n = New Line; \t = Tab; \\ = Escaped Backslash</small>		
Row Offset	<input type="text" value="1"/>	Row Limit	<input type="text"/>
Export Separator	<input type="text"/>		
Exports	<div><input type="button" value="Export"/> <input type="button" value="Share"/> <input type="button" value="Print"/></div> <div>User (independent subquery) Email</div>		
Matching Rows	2 Preview Results		
Filters	<div>Join User (independent subquery) / Role User</div> <div>Role User / Role Name Role IN Dataset Update - Inventory Manager</div>		

Reorder Mailing - Liquid Markup



Sender	<input <events@ksu.edu>"="" kansas="" state="" type="text" university\"="" value="\"/>		Reply To	<input type="text"/>
Recipient	<input type="text" value="{{email}}"/>			
CC	<input type="text" value="{{manager_email}}"/>			
Subject	<input type="text" value="Reorder Needed"/>	Version 1 <input type="button" value="v"/>		
Preheader	<input type="text"/>			

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

{{first}},

The following items are running low in our inventory. Please reorder them as soon as possible and let Amanda know when you have reordered.

- **{{item.name}}** - current count: **{{item.count}}**, standard reorder amt: **{{item.reorder}}**

Reorder Mailing - Liquid Looping Source Code



Creates object “item” and identifies the array “items”

Tells the loop to merge in the **name**, **count**, and **reorder** amount for each item with a low count

```
9 The following items are running low in our inventory. Please reorder them as soon as possible and let Amanda know when you have reordered.
10 <ul>
11 {% for item in items %}
12 <li>
13 {{item.name}} - current count: {{item.count}}, standard reorder amt: {{item.reorder}}
14 </li>
15 {% endfor %}
16 </ul>
```

Future improvements



Making sure cost is included

Better reporting tied to cost and trip usage

Processing in Workflow

Staff Dataset or User custom fields could tie directly to Inventory for reordering

Thank you for attending!

Questions?

PPT Slides & ReSources

Eric Hoffpauir
[LinkedIn](#)



Jon Rowand
[LinkedIn](#)

ReWorkflow