Make a Dash(board) for it!
Custom Record and Reader Dashboard Enhancements for Greater Operations/Advising Efficiencies

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Slate Innovation Festival
May 17, 2022

AGENDA

- ✓ **Dashboard build components**
- ✓ **Dashboard design piece examples**
  - • **Application records tabs**
    - ❖ **Conditional displays with liquid markup**
    - ❖ **Reader/workflow bin hyperlinks**
    - ❖ **Direct registrations for events and forms**
  - • **Reader portals**
    - ❖ **"Tags" customization**
    - ❖ **Material & School record popups**
- ✓ **Q&A**

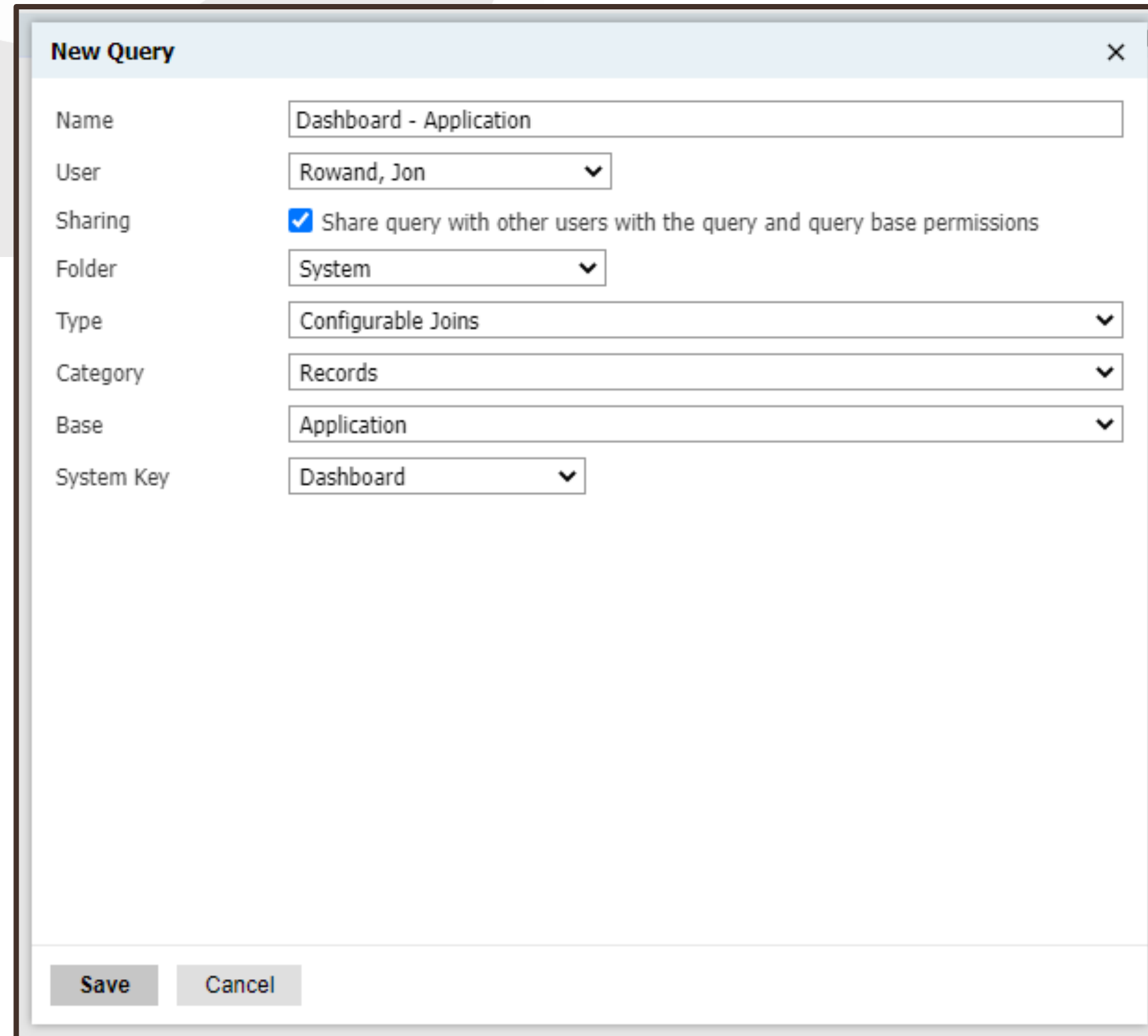*Start with the Basics → Progressively More Advanced Tips*

Dashboard Build Components

Application Dashboard

- Powered by a **system folder query***

- App Dashboard = Designed in the **Edit Dashboard** WYSIWYG editor

- *Reader Portal Dashboard could be a System folder dashboard(Dashboard Reader), but more functionality with portal **methods, views** and multiple **queries***

*Configurable Joins Query Bases Recommended

Application Dashboard

Dashboard Query's Edit Settings

New Query ✕

Name	Dashboard - Application
User	Rowand, Jon
Sharing	☑ Share query with other users with the query and query base permissions
Folder	System
Type	Configurable Joins
Category	Records
Base	Application
System Key	Dashboard

Save Cancel

Application Dashboard

Query Exports - Renamed to be Computer-Friendly
e.g. dashes (-) or underscores (_) instead of spaces

Exports

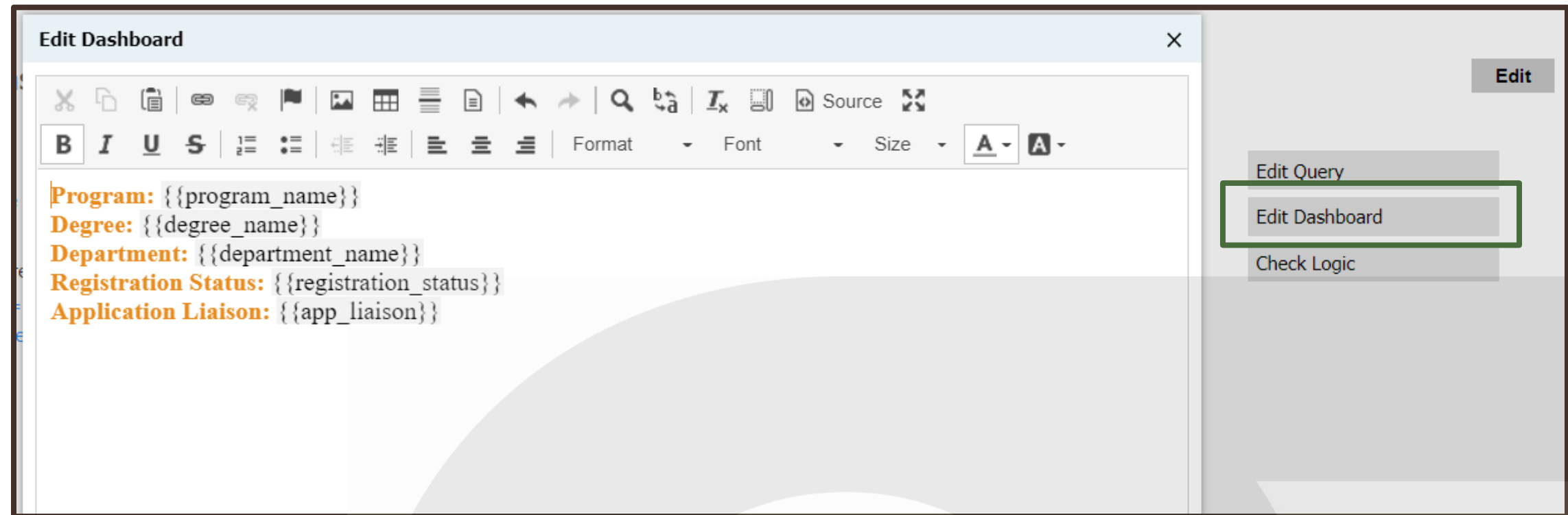| Application Reference ID | Export |
| Application-Reference-ID | Literal |
| app_ref | Custom SQL |

Edit

Rename Exports

Application Dashboard

Some Basics (with flair)

Program: Instructional Technology and Media
Degree: Doctor of Education
Department: MST
Registration Status: No
Application Liaison: Jon Rowand

Checklist

Insert Requirement

Edit Dashboard   ✕

Program: {{program_name}}
Degree: {{degree_name}}
Department: {{department_name}}
Registration Status: {{registration_status}}
Application Liaison: {{app_liaison}}

Edit

Edit Query
Edit Dashboard
Check Logic

Application Dashboard
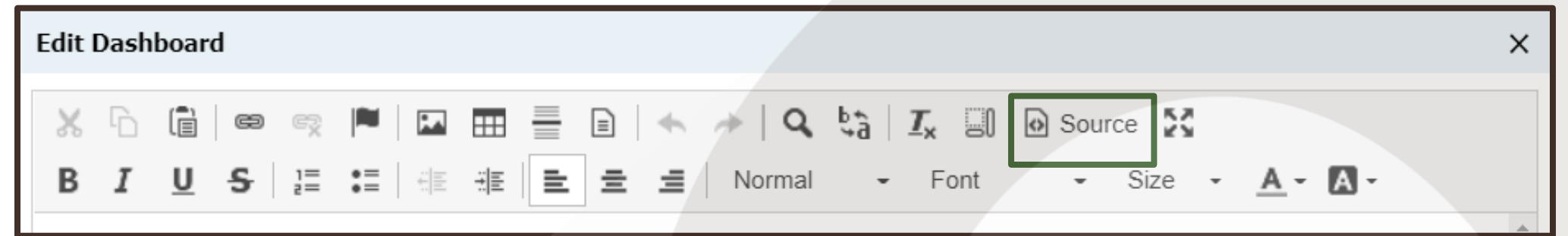
What can we customize/enhance?
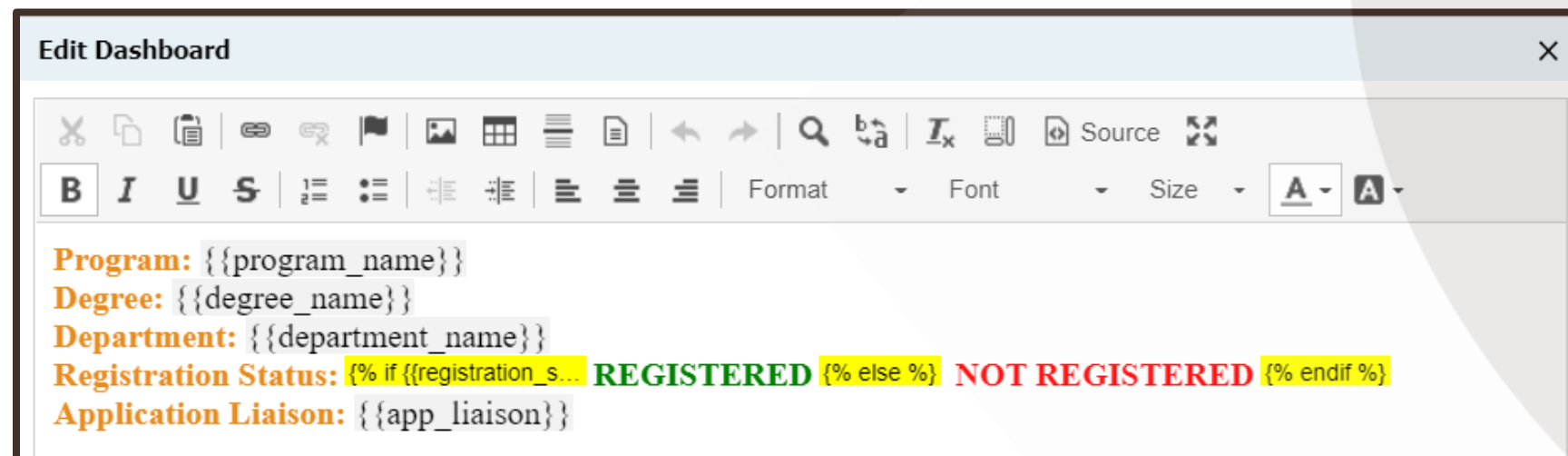

Let's Level Up!

Application Dashboard

Conditional Displays with Liquid Markup

Program: Instructional Technology and Media
Degree: Doctor of Education
Department: MST
Registration Status: No
Application Liaison: Jon Rowand

Edit Dashboard ✕

Source

B I U S Normal Font Size

{% if {{registration_status}} == '1' %}REGISTERED{% else %} NOT REGISTERED{% endif %}

Edit Dashboard ✕

Format Font Size

Source

B I U S

Program: {{program_name}}
Degree: {{degree_name}}
Department: {{department_name}}
Registration Status: {% if {{registration_s... **REGISTERED** {% else %} **NOT REGISTERED** {% endif %}
Application Liaison: {{app_liaison}}

Program: Instructional Technology and Media
Degree: Certificate
Department: MST
Registration Status: NOT REGISTERED
Application Liaison: Jon Rowand

Program: Instructional Technology and Media
Degree: Certificate
Department: MST
Registration Status: REGISTERED
Application Liaison: Jon Rowand

Application Dashboard

Conditional Displays with Liquid Markup

Current Bin: Admit

Admit
Reason: Admit Pending Transcripts
Status: Received

Open Record in Reader   ✕

Workflow

| ▼ |

Default Workflow
  Default Workflow (current bin: Admit)
Workflows
  Admission Counselor Touchpoints
  Graduate Application Review
  Special Scholarships
  Undergraduate Application Review

Read   Can

Awaiting   ˅

Overview
Financial Aid
Workflows
Portfolio
Populations

Read Application
Download PDF

Impersonate > Applications
Impersonate > Status Page
Edit Application Details

App Details
International Address
Processing

*Read Application > Workflows dropdown selection > Read
(i.e. click, click, click…"There's gotta be a better way!")*

Application Dashboard

Conditional Displays with Liquid Markup

Building out workflow bin hyperlinks
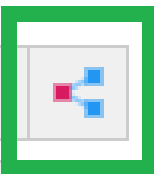
Application Dashboard

Edit Part

Status	Active
Name	act_workflow_yn
Source	Subquery Export
Type	Dependent subquery
Output	Existence
Value If Exists	Y
Value If Not Exists	N
Exports	⊞ Export
Filters	▼ Filter NOT (OR) ◉ Join ⚙

Join Workflow Bin

Join Workflow Bin / Workflow

Workflow / Name IN Admission Counselor Touchpoints

Groups	Group

Edit Part

Status	Active
Name	act_workflow_bin
Source	Subquery Export
Type	Dependent subquery
Output	Concatenate
Row Separator	\n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	1 Row Limit
Exports	⊞ Export

Workflow Name

:

Workflow Bin Workflow Bin

Filters	▼ Filter NOT (OR) ◉ Join ⚙

Join Workflow Bin

Join Workflow Bin / Workflow

Workflow / Name IN Admission Counselor Touchpoints

Application Dashboard

slate

TEST

Application

REV   Test Record   Search...

Edit Part

Status	Active
Name	act_workflow_bin_url
Source	Subquery Export
Type	Dependent subquery
Output	Concatenate
Row Separator	\n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	1 Row Limit
Exports	Export

https://greendalecc.edu/manage/reader/?r=https://greendalecc.edu/ma...

Application GUID

&tab=Application/Workflows&b= [T]

Workflow GUID

&id= [T]

Application GUID

| Filters | Filter   NOT   (OR   )   Join |

Join   Workflow Bin

Join   Workflow Bin / Workflow

Workflow / Name   IN Admission Counselor Touchpoints

Application Dashboard

Edit Dashboard ✕

```
<h3>
 Current Workflow(s) Bins
</h3>
{% if ug_workflow_yn == 'Y' %}<a href="{{ug_workflow_bin_url}}" target="_blank">{{-ug_workflow_bin-}}</a><br />{% endif %}
{% if grad_workflow_yn == 'Y' %}<a href="{{grad_workflow_bin_url}}" target="_blank">{{-grad_workflow_bin-}}</a><br />{% endif %}
{% if act_workflow_yn == 'Y' %}<a href="{{act_workflow_bin_url}}" target="_blank">{{-act_workflow_bin-}}</a><br />{% endif %}
{% if scholarships_workflow_yn == 'Y' %}<a href="{{scholarships_workflow_bin_url}}" target="_blank">{{-scholarships_workflow_bin-}}</a>{% endif %}
```

Current Workflow(s) Bins

{% if ug_workflow_y...

{{ug_workflow_bin}}

{% endif %}   {% if grad_workflow...

{{grad_workflow_bin}}

{% endif %}   {% if act_workflow_...

{{act_workflow_bin}}

{% endif %}   {% if scholarships_...

{{scholarships_workflow_bin}}

{% endif %}

Current Workflow(s) Bins

Graduate Application Review: Admit
Admission Counselor Touchpoints: Admit - Phone Call

Application Dashboard

Current Bin: Admit

Admit
Reason: Admit Pending Transcripts
Status: Received

Reader/Workflows Bins

Graduate Application Review: Admit
Admission Counselor Touchpoints: Admit - Phone Call
Special Scholarships: Award Scholarship

Overview
Financial Aid
Workflows
Portfolio
Populations

Read Application
Download PDF

Impersonate > Applications
Impersonate > Status Page

The Default Application Dashboard is sticking around...

"There's gotta be a better way!"

Application Dashboard

How to remove Slate's delivered out-of-the-box dashboard header table?

With a dash of JavaScript


```
<body>
  <script type="text/javascript">
    //Hide the built-in dashboard
    $d_div_count = $('.dashboard >
div').length;
if ($d_div_count > 1) {
    $('td > .dashboard > h2 ~ div:nth-child(-
1n+5)').remove();
    $('td > .dashboard > h2').remove();
  </script>
```
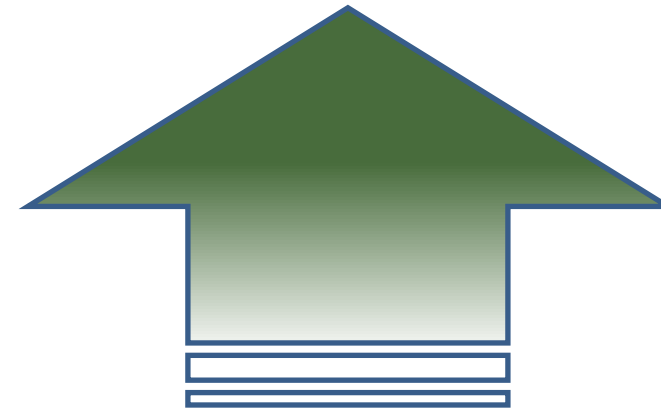
Application Dashboard

Customized application record tab dashboard header table

2022 Summer

Submitted: 03/01/2022
Last Updated: 05/16/2022

Bin: [Degree Applications - Final Admission Review](#)
Queue: Jon Rowand

Decision: Withdraw > Withdraw-Incomplete
Status: Released on 04/15/2022

2022 Summer

Decided
Submitted March 1, 2022
Last updated May 16, 2022

Current Bin: Final Admission Review
Queue: Jon Rowand

Withdraw
Reason: Withdraw Incomplete
Status: Released

Application Dashboard

Direct registrations for events and forms

Recreating the register link with query string parameters appended to the URL (App GUID, Person GUID)

Program: Instructional Technology and Media
Degree: Certificate
Department: MST
Registration Status: REGISTERED
Application Liaison: Jon Rowand

Reader/Workflows Bins

Graduate Application Review: Admit
Admission Counselor Touchpoints: Admit - Phone Call
Special Scholarships: Award Scholarship

Enhancement Request

Submit a Ticket

Events/Forms

Enrollment Response Form
Orientation Registration

Edit Part

Status	Active ⌄
Name	erf_url
Source	Subquery Export
Type	Dependent subquery ⌄
Output	Concatenate ⌄
Row Separator	\n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	1 Row Limit
Exports	⊞ Export
	https://glendalecc.edu/manage/form/register/EnrollmentResponse?perso...
	Application GUID
Filters	▼ Filter NOT (OR) Join

For example:
Counselors or student workers outreach to unresponsive admitted and/or deposited students.
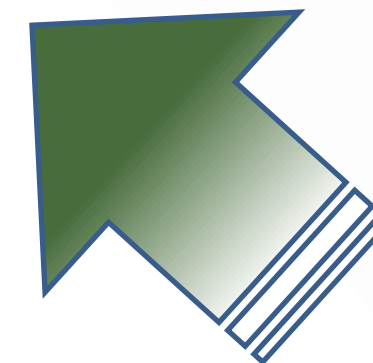
BONUS
Fun with icons

Application Dashboard

A couple more dashes of JavaScript?

*Hide the "Impersonate ›
Application" link, then recreate it
on the App Dashboard*

```
<script type="text/javascript">
    //Change text for Impersonate >
Status Page
  $('li > a:contains("Impersonate >
Application")').remove();
</script>
```

Edit Part

Status	Active
Name	show_impersonate_yn
Source	Subquery Export
Type	Dependent subquery
Output	Existence
Value If Exists	Y
Value If Not Exists	N
Exports	▦ Export ⬨T
Filters	▼ Filter NOT (OR) ◉ Join ⬨ ⚙

Join **Current User**

Join **Current User / Role User**

Role User / Role Name   Role IN Administrator (All Access), Admission Fi...

Edit Part

Status	Active
Name	impersonate_application_URL
Source	Subquery Export
Type	Dependent subquery
Output	Concatenate
Row Separator	\n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	1 Row Limit
Exports	▦ Export ⬨ T

https://glendalecc.edu/manage/lookup/record?cmd=impersonate&id=...

Person GUID

&r=/apply/?id= T

Application GUID

| Filters | ▼ Filter NOT (OR) ◉ Join ⬨ |

2022 Fall

Submitted: 03/28/2022
Last Updated: 05/16/2022
[Impersonate > Applications](#)

Program: Instructional Technology and Media
Degree: Doctor of Education
Department: MST
Registration Status: REGISTERED
Application Liaison: Jon Rowand

```
{% if {{show_impersonate_yn}} == 'Y' %}<a href="{{impersonate_application_URL}}" target="_blank">Impersonate > Applications</a>
```

Application Dashboard

A couple more dashes of JavaScript?

Impersonate › Status Page
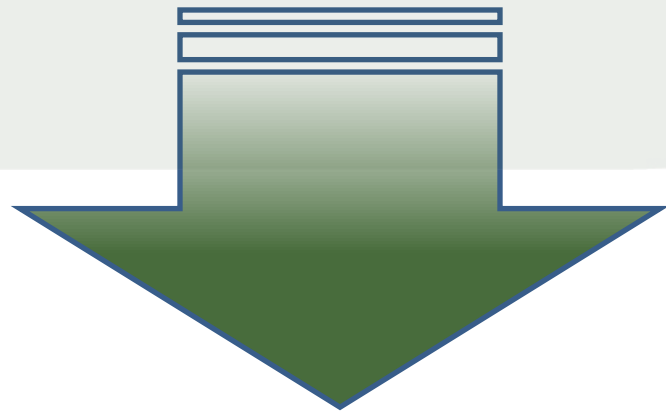
Impersonate › [custom label]

For example:

Read Application

Download PDF

Impersonate > Applications

Impersonate > Student Portal

Edit Application Details

```html
<script type="text/javascript">
    //Change text for Impersonate >
Status Page
  $('li > a:contains("Impersonate >
Status Page")').text('Impersonate >
Student Portal');
</script>
```

Application Dashboard

Student Information System (SIS) Deep Link Buttons (Banner)

Edit Part

Status	Active ▾
Name	saadcrv_link
Source	Subquery Export
Type	Dependent subquery ▾
Output	Concatenate ▾
Row Separator	\n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	1 Row Limit
Exports	▦ Export ⁝ T
	https://banner.glendalecc.edu/applicationNavigator/seamless?=SAADCR...
	Application GUID
Filters	▼ Filter ⁝ NOT (OR) ⬤ Join ⁝
Sorts	⬍ Sort ⁝

Banner Screens

SAADCRV	SAAADMS
SPAIDEN	SGASTDN
SOAHOLD	SFARHST
RRAAREQ	TSADETL

https://banner.tc.columbia.edu/applicationNavigator/seamless?=SAADCRV&person={{person-GUID}}

Reader Portal

"Tags" Customization

Show in Reader	Active ∨

REV   Test Record   Search...   ≡ ▼
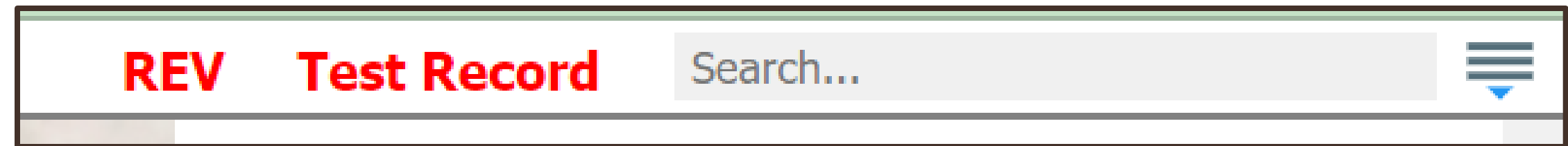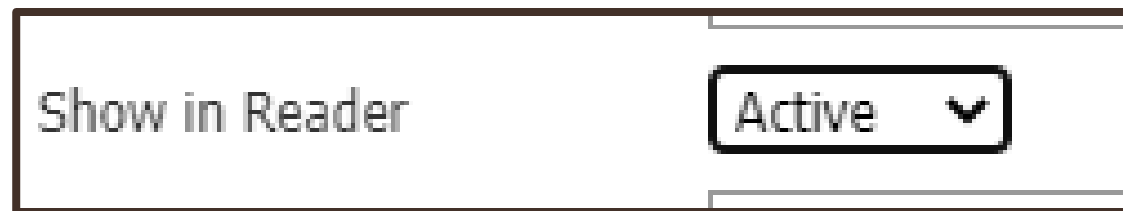
**Conditional Displays
with Liquid Markup**

*[refer back to Application
Dashboard examples]*

=

**Some room for
creativity here**

For example:

- Fraud review
- Director/Dean hold

*Any highlights that you don't want
faculty and/or readers to be biased by.*

Reader Portal

Popup Windows for Bringing Tabs into the Reader

Editing school details while reading

Screen #1

Screen #2

Reader Portal

Popup Windows for Bringing Tabs into the Reader

Reader Portal

Export Merge Field and Hyperlink on the View

Another Example
Materials tab > marking a material as illegible

Reader Portal

Application/Person Scoped Form Submissions

Review Forms

Date ▼		Bin
03/03/2022	Processing Review Form	Complete Application
03/07/2022	Program Review Form	Faculty Program Review
03/09/2022	Admission Decision Allocation Form	Final Admission Review

For Example
Workflows or bin processes that require protecting sensitive information such as fraud or criminal background check review

Reader Portal

Application/Person Scoped Form Submissions

Create a portal **Method** and a **View** for your popup

View *(popup)*

Edit Part (Form)

Name	Form Popup
Status	Active
CSS Class Name	Form-Popup
Form	Tab Forms - Form-Popup
Submission Behavior	☑ Reload portal when form is submitted
Popup	☑ Form is inside a popup
Query String Parameters	☑ Enable passing form-related query string parameters into the form (i.e. person, form_fieldKey)

Filters

Matching Rows	920
Filters	▼ Filter NOT (OR) Join

Method *(popup)*

Edit Details

Status	Active
Name	Form Popup
Type	GET
Output Type	AJAX Popup/No Branding
Page Title	
Action	formpopup
View	Form Popup

View *(dashboard)*

```
<a data-href="?cmd=formpopup&amp;person={{app_guid}}" href="#" onclick="$(this).parents('tr').css('font-style','italic');
return(FW.Lazy.Popup(this, {width: '500px'}));"><span style="background-color:#004B87; color:white;">Form</span></a><br />
```

Thank you for participating!

Any Questions?

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Slate Slack Users Group – https://slate-users.slack.com/