

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

Jon Rowand  
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

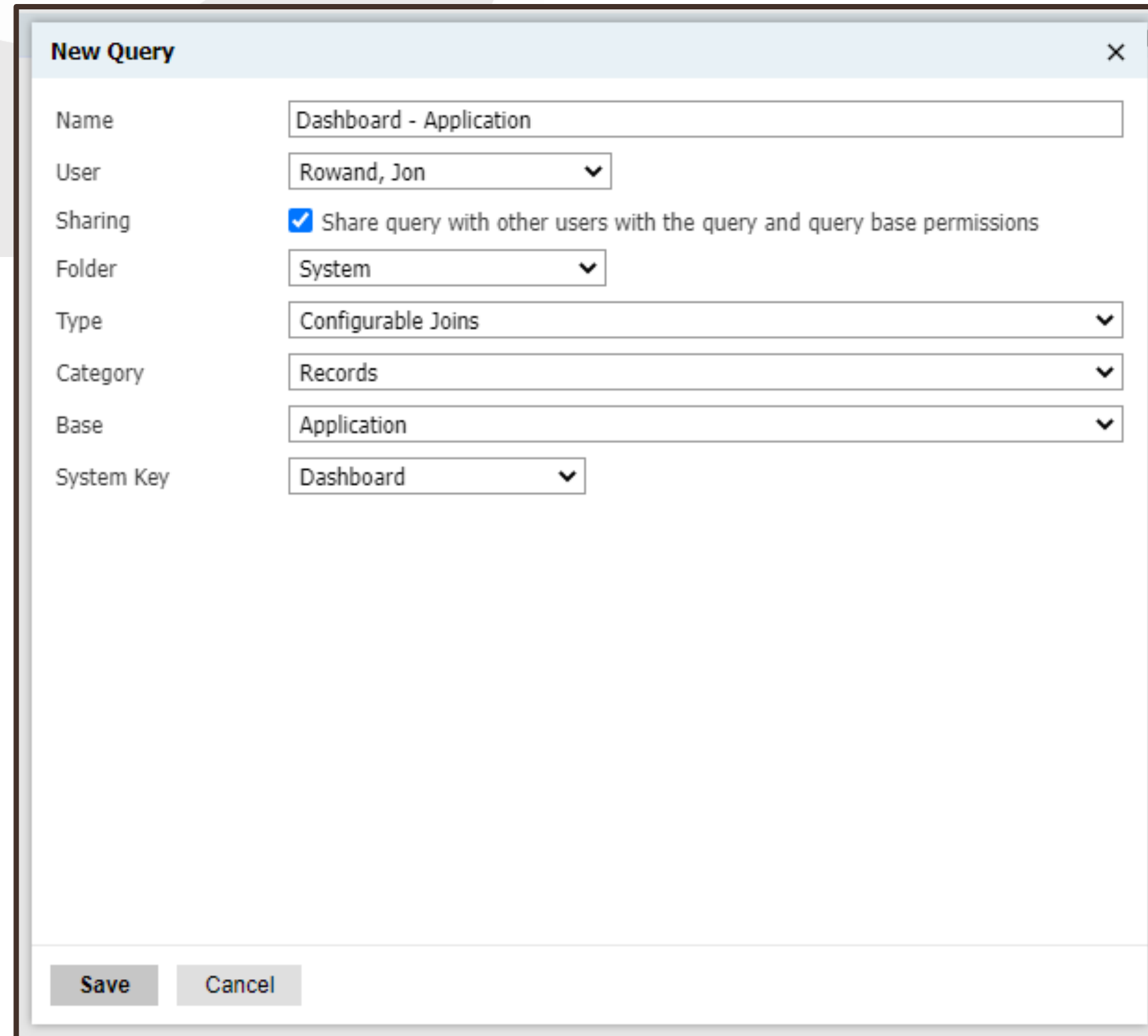
## Application Dashboard

- 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



The image shows a 'New Query' dialog box with the following settings:

Field	Value
Name	Dashboard - Application
User	Rowand, Jon
Sharing	<input checked="" type="checkbox"/> Share query with other users with the query and query base permissions
Folder	System
Type	Configurable Joins
Category	Records
Base	Application
System Key	Dashboard

Buttons: 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	

[Rename Exports](#)

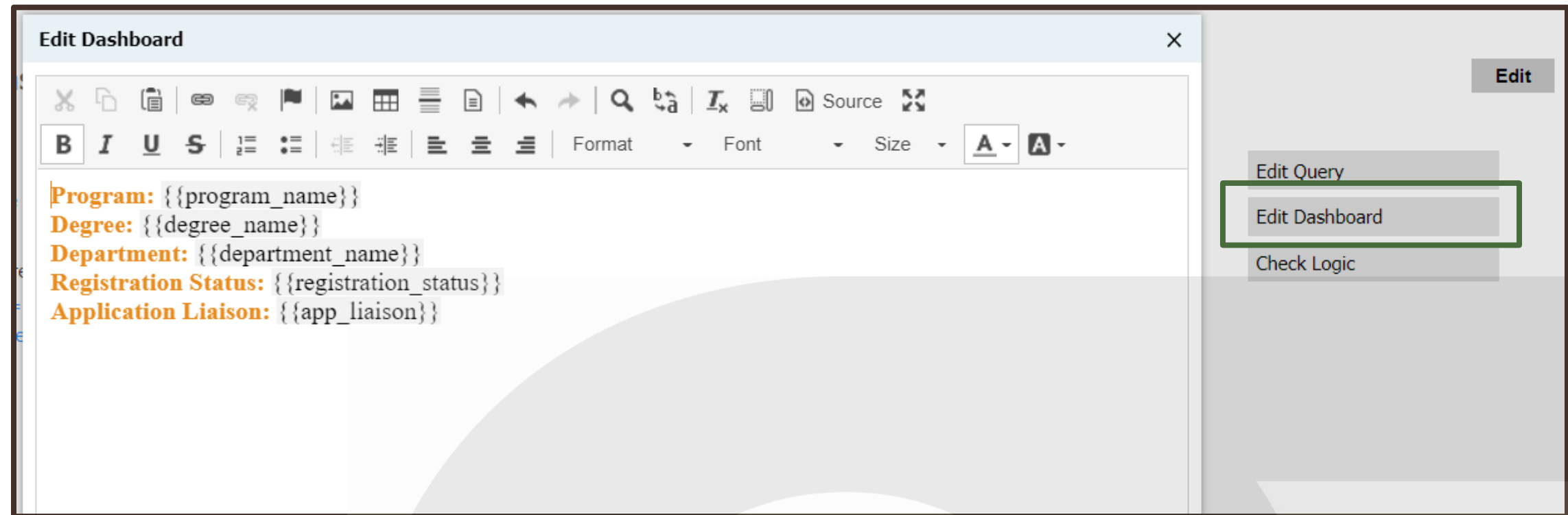
# Application Dashboard

## 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](#)



The screenshot shows a web application interface for editing a dashboard. The main area is a rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, table, and source code. The text in the editor is: **Program:** {{program\_name}}, **Degree:** {{degree\_name}}, **Department:** {{department\_name}}, **Registration Status:** {{registration\_status}}, and **Application Liaison:** {{app\_liaison}}. To the right of the editor is a sidebar with an 'Edit' button at the top, followed by three buttons: 'Edit Query', 'Edit Dashboard' (which is highlighted with a green box), and 'Check Logic'.



# Application Dashboard

What can we customize/enhance?

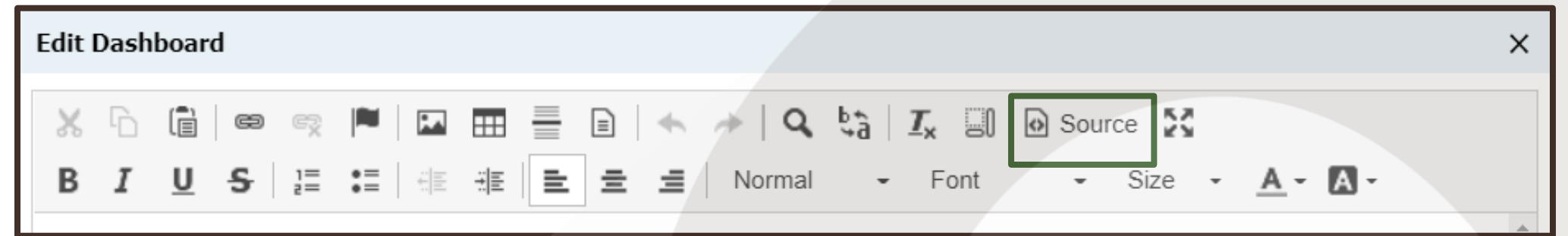


*Let's Level Up!*

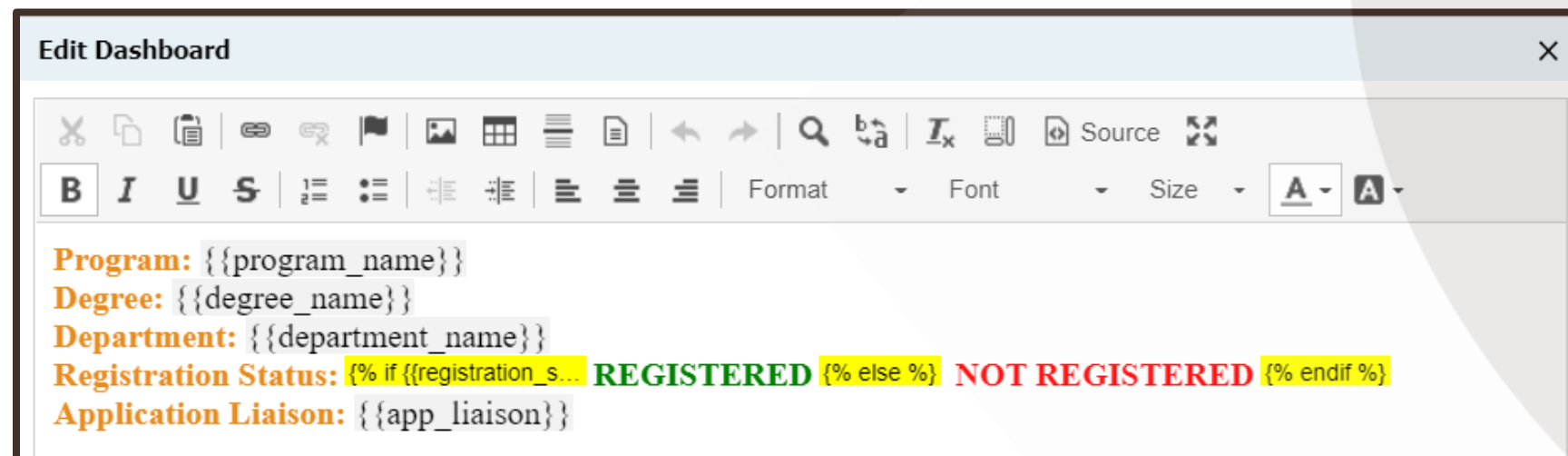
# Application Dashboard

## Conditional Displays with Liquid Markup

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



```
{% if {{registration_status}} == '1' %}<span style="color:green">REGISTERED</span>{% else %} <span style="color:red"> NOT REGISTERED</span>{% endif %}
```



**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

The screenshot displays an application dashboard interface. At the top left, a box labeled "Current Bin: Admit" is highlighted. To its right, the text "Admit", "Reason: Admit Pending Transcripts", and "Status: Received" is visible. A modal window titled "Open Record in Reader" is open, featuring a "Workflow" dropdown menu. The dropdown menu is expanded, showing a "Default Workflow" section with "Default Workflow (current bin: Admit)" selected, and a "Workflows" section with options: "Admission Counselor Touchpoints", "Graduate Application Review", "Special Scholarships", and "Undergraduate Application Review". Below the dropdown, a "Read" button is highlighted. On the right side of the dashboard, a sidebar menu under "Overview" includes links for "Financial Aid", "Workflows", "Portfolio", "Populations", "Read Application" (highlighted), "Download PDF", "Impersonate > Applications", "Impersonate > Status Page", "Edit Application Details", "App Details", "International Address", and "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*

#### Exports

act\_workflow\_yn  Existence Exists: Y Not Exists: N

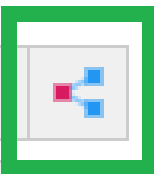
act\_workflow\_bin  Concatenate

act\_workflow\_bin\_url  Concatenate

 Export

 Literal

 Custom SQL



# Application Dashboard

**Edit Part**

Status

Name

Source

Type

Output

Value If Exists

Value If Not Exists

Exports

Filters

**Join** [Workflow Bin](#)

**Join** [Workflow Bin / Workflow](#)

Groups

**Edit Part**

Status

Name

Source

Type

Output

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

Row Offset  Row Limit

Exports

Filters

**Join** [Workflow Bin](#)

**Join** [Workflow Bin / Workflow](#)

# Application Dashboard

← → ↻ <https://greendalecc.edu/manage/reader/?r=https%3a%2f%2fgreendalecc.edu%2fmanage%2flookup%2frecord%3fid%3dfa32173c-0144-45a1-ae19-0ffa96f0a63%26tab%3dApplication%252fWorkflows&b=9e0427c3-814f-4a43-a40c-51854ad23e4a&id=fa32173c-0144-4>

**slate** 314918863 Lane (TEST), Penny REV Test Record Search...

1 / 1, Transcript: University of Washington (University of Washington - Transcript (Copy))

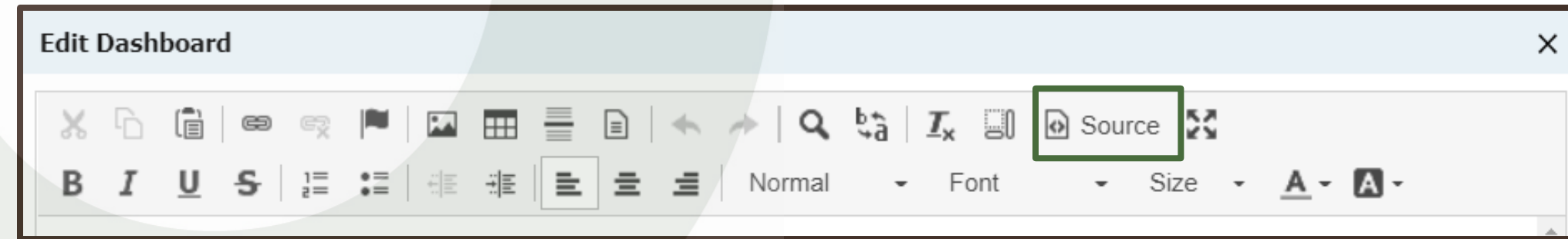
TEST

Application

### Edit Part

Status	Active ▾
Name	act_workflow_bin_url
Source	Subquery Export
Type	Dependent subquery ▾
Output	Concatenate ▾
Row Separator	<input type="text"/> \n = New Line; \t = Tab; \\ = Escaped Backslash
Row Offset	<input type="text" value="1"/> Row Limit <input type="text"/>
Exports	<input type="button" value="Export"/> <input type="button" value="↔"/> <input type="button" value="🔗"/>
	<input type="text" value="https://greendalecc.edu/manage/reader/?r=https://greendalecc.edu/ma..."/>
	<input type="text" value="Application GUID"/>
	<input type="text" value="&amp;tab=Application/Workflows&amp;b= 🔗"/>
	<input type="text" value="Workflow GUID"/>
	<input type="text" value="&amp;id= 🔗"/>
	<input type="text" value="Application GUID"/>
Filters	<input type="button" value="Filter"/> <input type="button" value="↔"/> NOT ( OR ) <input type="button" value="Join"/> <input type="button" value="⚙️"/>
	Join <a href="#">Workflow Bin</a>
	Join <a href="#">Workflow Bin / Workflow</a>
	<input type="text" value="Workflow / Name IN Admission Counselor Touchpoints"/>

# Application 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 = $('<strong>.dashboard >
div').length;
if ($d_div_count > 1) {
  $('<strong>td > .dashboard > h2 ~ div:nth-child(-
1n+5)').remove();
  $('<strong>td > .dashboard > h2').remove();
  </script>
```

# Application Dashboard

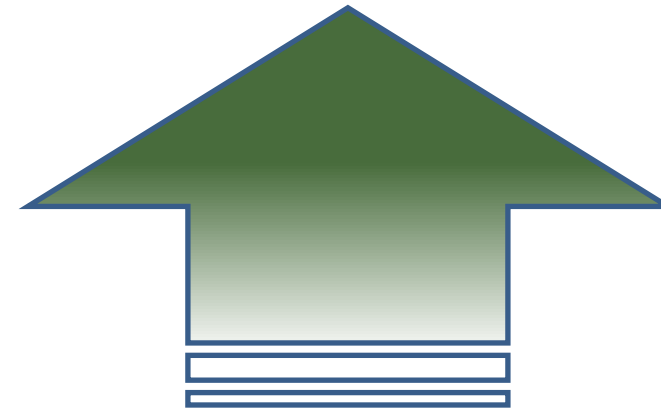
## Customized application record tab dashboard header table

**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

## Events/Forms

[Enrollment Response Form](#)  
[Orientation Registration](#)

## Reader/Workflows Bins

[Graduate Application Review: Admit](#)  
[Admission Counselor Touchpoints: Admit - Phone Call](#)  
[Special Scholarships: Award Scholarship](#)

[Enhancement Request](#)



[Submit a Ticket](#)



**Edit Part**

Status:

Name:

Source: Subquery Export

Type:

Output:

Row Separator:  \n = New Line; \t = Tab; \\ = Escaped Backslash

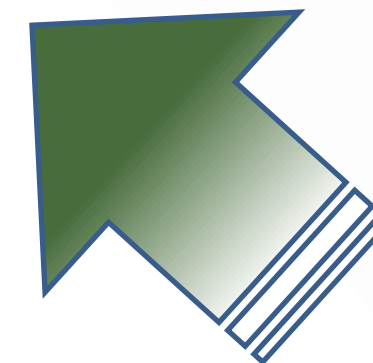
Row Offset:  Row Limit:

Exports:

Filters:

## **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>
```

The screenshot shows the 'Edit Part' configuration window for a part named 'show\_impersonate\_yn'. The 'Status' is set to 'Active'. The 'Name' is 'show\_impersonate\_yn'. The 'Source' is 'Subquery Export'. The 'Type' is 'Dependent subquery'. The 'Output' is 'Existence'. The 'Value If Exists' is 'Y' and the 'Value If Not Exists' is 'N'. There are 'Export' and 'Filter' buttons. The 'Filters' section shows a join between 'Current User' and 'Current User / Role User'.

The screenshot shows the 'Edit Part' configuration window for a part named 'impersonate\_application\_URL'. The 'Status' is set to 'Active'. The 'Name' is 'impersonate\_application\_URL'. The 'Source' is 'Subquery Export'. The 'Type' is 'Dependent subquery'. The 'Output' is 'Concatenate'. The 'Row Separator' is '\n = New Line; \t = Tab; \\ = Escaped Backslash'. The 'Row Offset' is '1' and the 'Row Limit' is empty. There are 'Export' and 'Filter' buttons. The 'Exports' section shows a URL: 'https://glendalecc.edu/manage/lookup/record?cmd=impersonate&id=...'. The 'Filters' section shows a join between 'Person GUID' and 'Application GUID'.

## 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

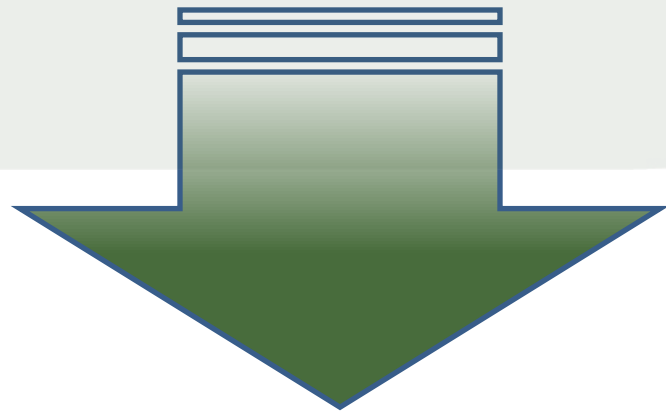
**Application Liaison:** Jon Rowand

```
{% 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](#)

```
<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:

Filters:

Sorts:

### Banner Screens

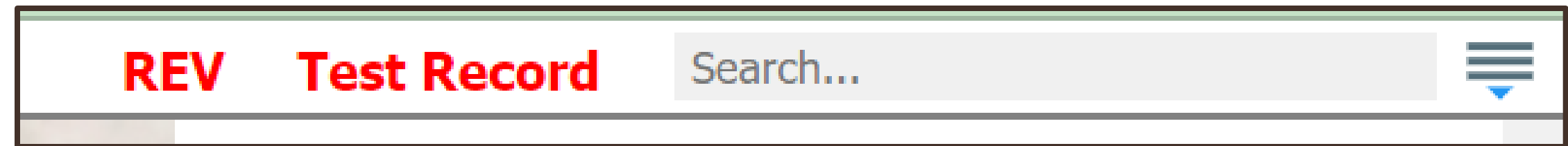
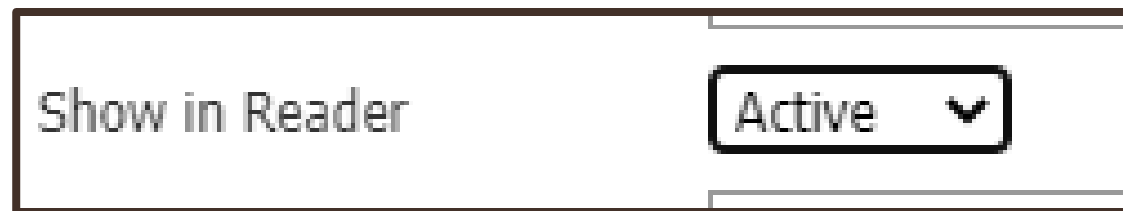
SAADCRV	SAAADMS
SPAIDEN	SGASTDN
SOAHOLD	SFARHST
RRAAREQ	TSADETL

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



# Reader Portal

## *“Tags” Customization*



## **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

**slate** 314918863 Lane (TEST), Penny REV Test Record Search...

**community**

### Applicant Dashboard for Penny

**Applicant Information**

Degree: Master of Arts - Initial Certification  
Round: 2022 Fall  
Program: Applied Linguistics  
Anticipated Enrollment:

Sex:  
Gender:  
Race:  
Citizenship: FN  
Age: 107

Active Address: New York, NY, United States

Admit shift:

**Schools Attended**

School	Degree Type	From	To	Conferral	GPA
Tacoma Community College	Associate Degree	2010-01-01	2011-10-01		3.5
University of Washington	Bachelor of Arts	2011-01-01	2014-08-01	2014-08-01	3.77

**Test Scores**

ELP Test Status	ELP Test Date	ELP Test Type
Verified	2021-02-01	TOEFL

#### Screen #2

**slate** You are accessing a TIME WARP ENVIRONMENT of Slate that is for auditing purposes only. Snapshot Date: 04/19/2022 05:20 AM

Lane (TEST), Penny Rule execution successfully queued 1m ago. [Preview pending actions](#) Applicant 314918863

Dashboard Timeline 2022 Fall Decided 2022 Summer AdvC... Decided 2022 Summer 2022 Fall Profile Materials +

Name	Degree	From	To	School Conferred Date
<a href="#">New School</a>				
University of Washington	Bachelor of Arts	01/01/2011	08/01/2014	08/01/2014
Tacoma Community College	Associate Degree	01/01/2010	10/01/2011	

**Profile**

- [Overview](#)
- [Biographical](#)
- [Contact / Address](#)
- [Relationships](#)
- Schools**
- [Scores](#)
- [Jobs](#)
- [Courses](#)
- [Interests](#)
- [Sports](#)
- [Account](#)
- [Create Application](#)
- [Restore Application](#)
- [Edit Slate ID](#)
- [Edit Restricted Access](#)

Set Default Tab

# Reader Portal

## Popup Windows for Bringing Tabs into the Reader

314918863 Lane (TEST), Penny REV Test Record Search...

TC Lane (TEST), Penny - Google Chrome  
apply.tc.edu/manage/lookup/record?id=bc9d4c01-21e1-4128-b4d7-5ffe41a58df7&tab=Profile%2fSchools

slate Jon Rowand Search...

Lane (TEST), Penny Rule execution successfully queued 2m ago. [Preview pending actions](#) Applicant 314918863

Dashboard Timeline ■ 2022 Fall Decided ■ 2022 Summer AdvC... Awaiting Materials ■ 2022 Summer ■ 2022 +

Name	Degree	From	To	School Conferred Date
<a href="#">New School</a>				
University of Washin...	Bachelor of Arts	01/01/2011	08/01/2014	08/01/2014
Tacoma Community ...	Associate Degree	01/01/2010	11/01/2011	

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

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

or Penny

**Schools Attended**

Name	Degree Type	From	To	Conferral	GPA
Community College	Associate Degree	2010-01-01	2011-10-01		3.5
of Washington	Bachelor of Arts	2011-01-01	2014-08-01	2014-08-01	3.77

**Test Scores**

Status	ELP Test Date	ELP Test Type	ELP Test Total
	2021-02-01	TOEFL	120

GRE Test  
Test Optional Hidden

# Reader Portal

## Export Merge Field and Hyperlink on the View

**Edit Part**

Status: Active

Name: schooltable-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://apply.tc.edu/manage/lookup/record?id= {{schooltable\_url}}&tab=Profile%2fSchools

Person GUID:

Filters: Filter, NOT, (, OR, ), Join

Sorts: Sort

Save, Delete, Cancel

**Edit Part (Static Content)**

Name: Schools Attended Title

Status: Active

CSS Class Name:

Link

Link Info | Target

Display Text: Schools Attended

Link Type: URL

Protocol: <other>

URL: {{schooltable\_url}}

Browse Server

OK, Cancel

**Link**

Link Info | Target

Target: <popup window>

Popup Window Name:

Popup Window Features:

- Resizable
- Location Bar
- Menu Bar
- Scroll Bars
- Status Bar
- Toolbar
- Full Screen (IE)
- Dependent (Netscape)

Width: 600

Height: 600

Left Position: 100

Top Position: 100

OK, Cancel

### **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	<input checked="" type="checkbox"/> Reload portal when form is submitted
Popup	<input checked="" type="checkbox"/> Form is inside a popup
Query String Parameters	<input checked="" type="checkbox"/> Enable passing form-related query string parameters into the form (i.e. person, form_fieldKey)
Filters	
Matching Rows	920
Filters	<input type="button" value="Filter"/> <input type="button" value="NOT"/> ( <input type="button" value="OR"/> ) <input type="button" value="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&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?**

**Jon Rowand**

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<https://www.linkedin.com/in/jonmaesrowand/>

**Slate Slack Users Group - <https://slate-users.slack.com/>**