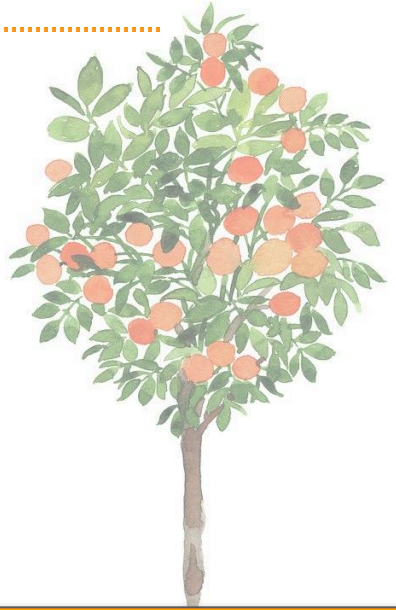
# Using Slate to Communicate with and Empower Staff

*This session focuses on how Pitzer is leveraging Slate tools to improve business processes and increase efficiency in staff communications.*



# Pitzer College

- Small Liberal Arts College
- Claremont Colleges
- Located in Southern California
- ~1,000 undergraduate students
- On Slate since 2016



PITZER COLLEGE
OFFICE OF ADMISSION

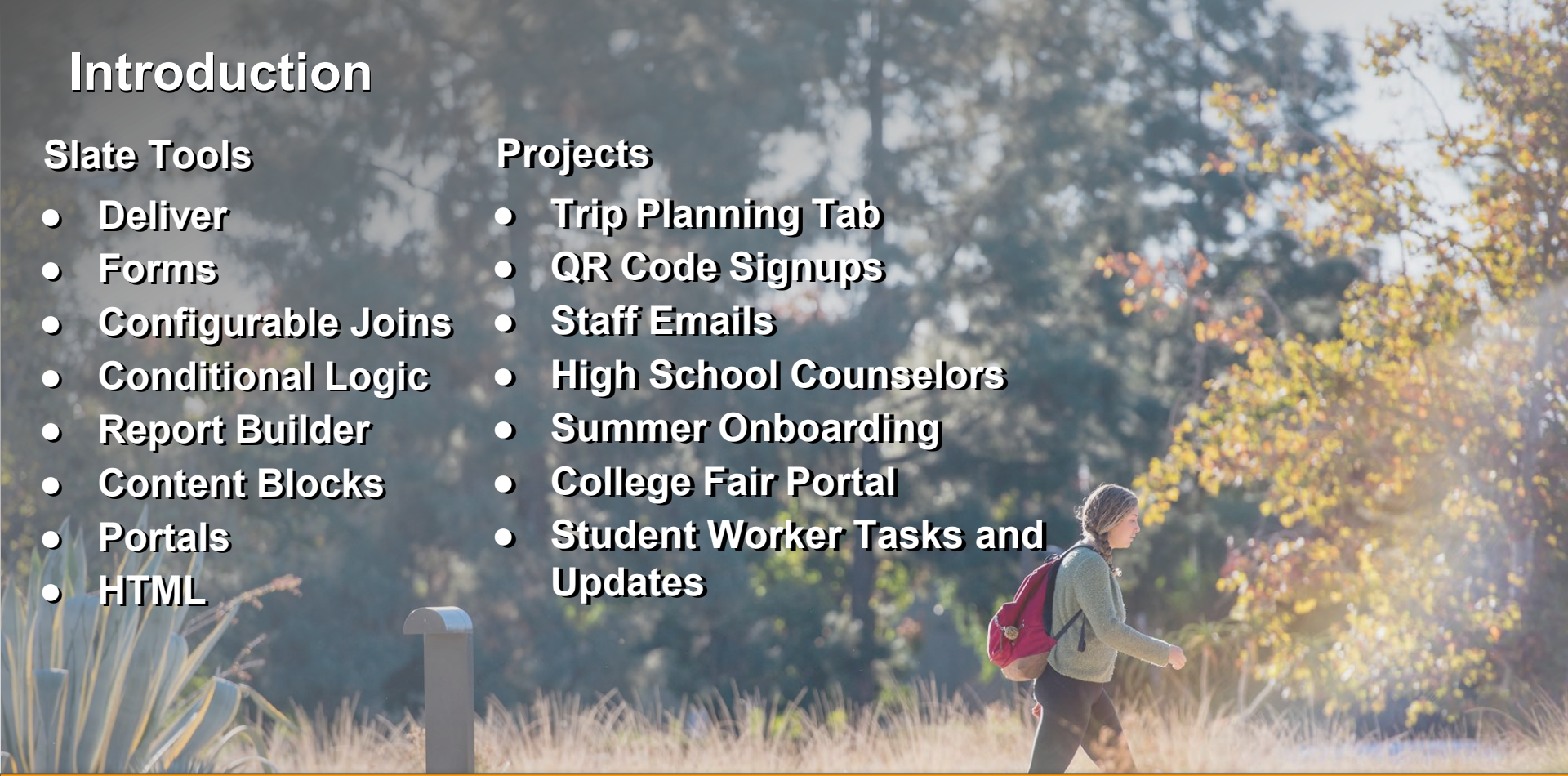
# Introduction

## Slate Tools

- Deliver
- Forms
- Configurable Joins
- Conditional Logic
- Report Builder
- Content Blocks
- Portals
- HTML

## Projects

- Trip Planning Tab
- QR Code Signups
- Staff Emails
- High School Counselors
- Summer Onboarding
- College Fair Portal
- Student Worker Tasks and Updates



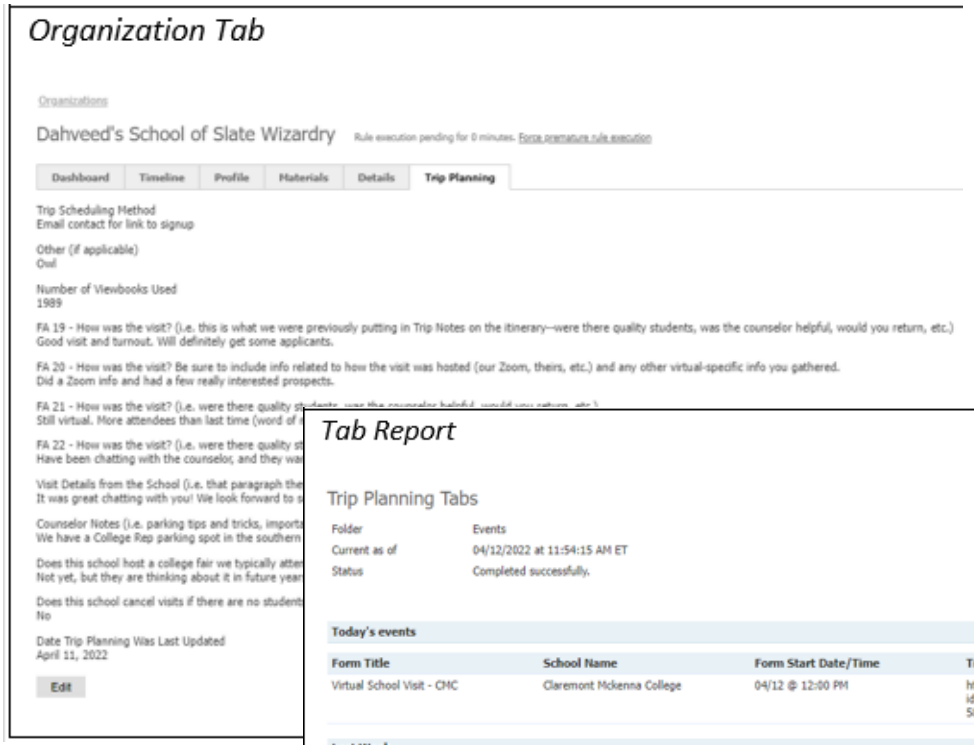
# Focus

- Leverage the strengths of Slate
- Make the lives of our staff simpler
- Provide a better user experience for students and staff



# Trip Planning

- Turnover each summer/changing territory
- Lost institutional knowledge of School/CBO Visits and College Fairs
- Added a Trip Planning Tab to track Scheduling method, material #s as well as trip and school and counselor info
- Emails and Reports to complete the entry



Organization Tab

Organizations

Dahveed's School of Slate Wizardry Rule execution pending for 0 minutes. Force premature rule execution

Dashboard | Timeline | Profile | Materials | Details | Trip Planning

Trip Scheduling Method
Email contact for link to signup

Other (if applicable)
Owl

Number of Viewbooks Used
1989

FA 19 - How was the visit? (i.e. this is what we were previously putting in Trip Notes on the itinerary--were there quality students, was the counselor helpful, would you return, etc.)
Good visit and turnout. Will definitely get some applicants.

FA 20 - How was the visit? Be sure to include info related to how the visit was hosted (our Zoom, theirs, etc.) and any other virtual-specific info you gathered.
Did a Zoom info and had a few really interested prospects.

FA 21 - How was the visit? (i.e. were there quality students, was the counselor helpful, would you return, etc.)
Still virtual. More attendees than last time (word of

FA 22 - How was the visit? (i.e. were there quality st
Have been chatting with the counselor, and they wa

Visit Details from the School (i.e. that paragraph the
It was great chatting with you! We look forward to s

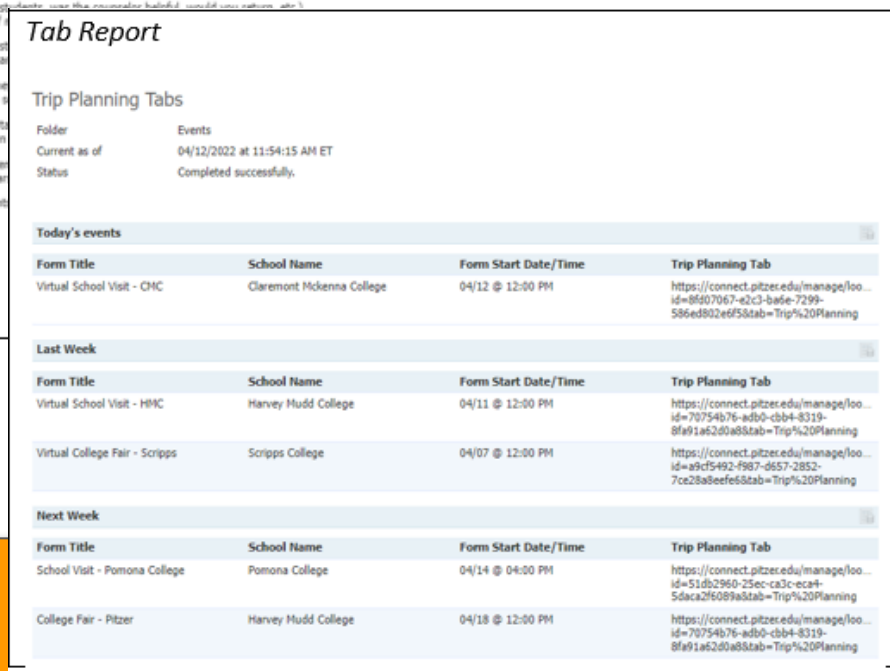
Counselor Notes (i.e. parking tips and tricks, import
We have a College Rep parking spot in the southern

Does this school host a college fair we typically atte
Not yet, but they are thinking about it in future year

Does this school cancel visits if there are no student
No

Date Trip Planning Was Last Updated
April 11, 2022

Edit



Tab Report

Trip Planning Tabs

| | |
|---|---|
| Folder | Events |
| Current as of | 04/12/2022 at 11:54:15 AM ET |
| Status | Completed successfully. |

**Today's events**

| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| Virtual School Visit - CMC | Claremont Mckenna College | 04/12 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=8fd07067-e2c3-ba6e-7299-586ed802e6f5&tab=Trip%20Planning |

**Last Week**

| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| Virtual School Visit - HMC | Harvey Mudd College | 04/11 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=70754b76-adb0-cbb4-8319-8fa91a62d0a8&tab=Trip%20Planning |
| Virtual College Fair - Scripps | Scripps College | 04/07 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=a9cf5492-f987-d657-2852-7ce28a8eefe6&tab=Trip%20Planning |

**Next Week**

| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| School Visit - Pomona College | Pomona College | 04/14 @ 04:00 PM | https://connect.pitzer.edu/manage/loo... id=51db2960-25ec-ca3c-eca4-5daca2f6089a&tab=Trip%20Planning |
| College Fair - Pitzer | Harvey Mudd College | 04/18 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=70754b76-adb0-cbb4-8319-8fa91a62d0a8&tab=Trip%20Planning |

# Trip Planning

- 1st Email

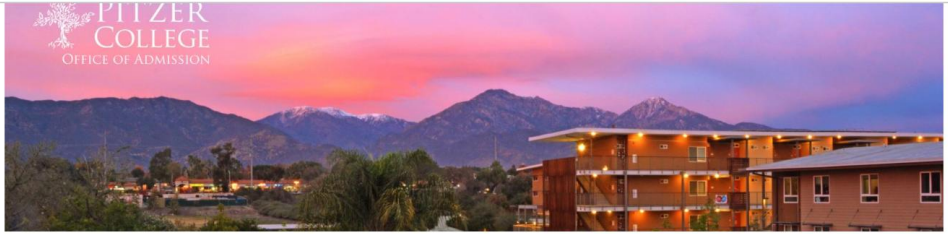



Hi {{User-First-Name}},

Congrats on completing another visit for your **{{Form-Trip}}** trip!

In order to improve trip planning for yourself and future counselors, please complete the Trip Planning tab for **{{Location-Record-Name}}** - {{Url1}}{{Url2}}{{url3}}.

Thanks!
{{'Cecil' | snippet: "signature"}}




Hi David,

Congrats on completing another visit for your **Fictional Schools** trip!

In order to improve trip planning for yourself and future counselors, please complete the Trip Planning tab for **Dahveed's School of Slate Wizardry** - https://connect.pitzer.edu/manage/lookup/dataset?id=f866b089-2c12-45d0-90b8-a9dd31cbf51b&tab=Trip%20Planning.

Thanks!

Cecil Slate Hen

**Cecil the Slate Hen**
Slate Automated Email

# Trip Planning

- 1st Email

update_less_current_year

Subquery Export

Dependent subquery

Formula

1 Row Limit

(case when (@location_update_date < @current_year) then 'use' else '' end)

Export

location_update_date

current_year

Url1 https://connect.pitzer.edu/manage/lookup/dataset?id=

Url2

url3 &tab=Trip%20Planning

Name Url2

Source Export / Location Record / GUID

Display Width e.g, 100px or 75%

Link Type

URL

Protocol <other>

URL {{Url1}}{{Url2}}{{url3}}

ove trip planning for yourself and future counselors, please c

**{{Location-Record-Name}}** - {{Url1}}{{Url2}}{{url3}}.

# Trip Planning

- 2nd Email

counselor_trip_planning

| Title | URL |
| --- | --- |
| {{list.title}} | {{list.url}} |

ource

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <table>
   <thead>
    <tr>
     <th style="text-align: left;" width="50%">Title</th>
     <th style="text-align: left;" width="50%">URL</th>
    </tr>
   </thead>
   <tbody>{% for list in Events %}
    <tr>
     <td style="vertical-align:top">{{list.title}}</td>
     <td style="vertical-align:top">{{list.url}}</td>
    </tr>
    {% endfor %}
   </tbody>
  </table>
 </body>
</html>
```

Hi {{Preferred}},

Please visit the Trip Planning Report and complete the Planning Tabs for your events - https://connect.pitzer.edu/manage/report/render?id=0d9a7fd1-67d0-41f9-b999-ec439d5ea959

Your can also find your Trip Planning tabs for today below

{{'counselor_trip_planning' | snippet: "dictionary"}}

Thanks!



Hi David,

Please visit the Trip Planning Report and complete the Planning Tabs for your events - https://connect.pitzer.edu/manage/report/render?id=0d9a7fd1-67d0-41f9-b999-ec439d5ea959

Your can also find your Trip Planning tabs for today below

| Title | URL |
| --- | --- |
| College Fair - Dahveed's School for Gifted Slaters | https://connect.pitzer.edu/manage/lookup/dataset?id=A2D69E26-4DB0-4B0C-ADA0-49B13D029F76&tab=Trip%20Planning |
| School Vist - Dahveed's School of Slate Wizardry | https://connect.pitzer.edu/manage/lookup/dataset?id=F866B089-2C12-45D0-90B8-A9DD31CBF51B&tab=Trip%20Planning |

# Trip Planning

| | |
|---|---|
| User | David Dysart |
| Base | Configurable Joins - Active FT Staff |
| Execution Mode | Retrieve only the new records since query was last run |

Exports

- Events — Dictionary — Row Limit: 40
- Preferred
- Email
- counselor_trip_planning — counselor_trip_planning
- Cecil — Cecil

Filters — Matching Rows: 8

- Type IN Counselor

Dictionary

1 Row Limit 40

Export

- title
- url
- date_time

Filter | NOT | ( | OR | ) | Join

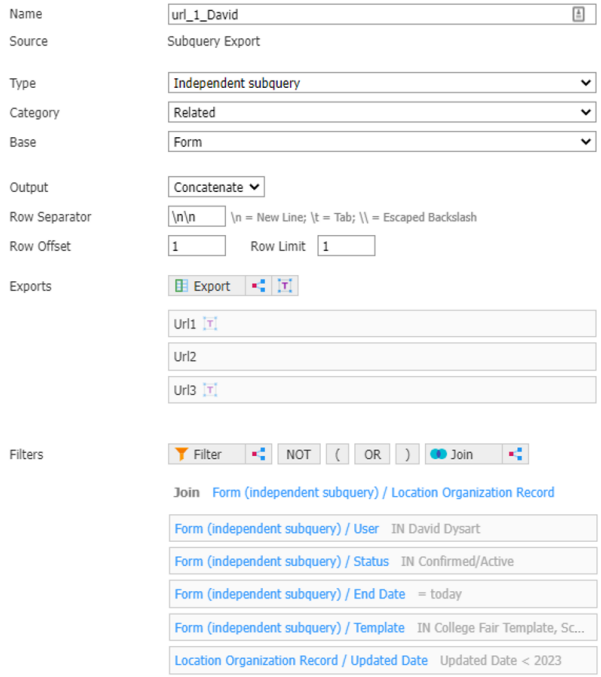
Join Form (independent subquery) / Location Organization Record

Join Form (independent subquery) / User

- Event User = FT Staff SSO
- Form (independent subquery) / Start Date = today
- Form (independent subquery) / Template IN CBO Visit Template, Colle...
- Form (independent subquery) / Status IN Confirmed/Active
- update_less_current_year

# Trip Planning

- Linking




Url1

Nested Literal / url_1_David

https://connect.pitzer.edu/manage/lookup/dataset?id=

Special Characters: \n = New Line; \t = Tab; \\ = Escaped Backslash

Url2

Nested Export / Form (independent subquery) / Location Organization Record / GUID / url_1_David

Url3

Nested Literal / url_1_David

&tab=Trip%20Planning

Special Characters: \n = New Line; \t = Tab; \\ = Escaped Backslash

Your can also find your Trip Plannin

{{event_1_David}} {{url_1_David}}

{{event_2_David}} {{url_2_David}}

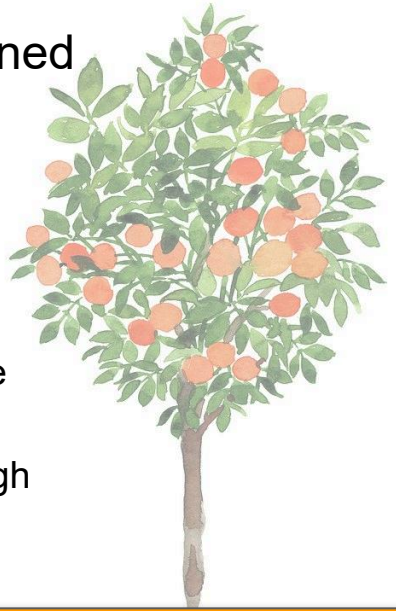
Merge Field

url_1_David

# QR Code Signups

- School/CBO Visit/College Fair & Group Visits (prior counselor sign-up)
- Staff are emailed QR Codes that attendees can scan to register for the event. These can also be generated if needed immediately
- They can also be printed, displayed on a laptop/tablet, or scanned from counselor phones

- Pros
  - Environmental sustainability (a core value at Pitzer)
  - No unreadable inquiry cards
  - Showcases innovative nature of Pitzer
  - Quick and easy
- Cons
  - Students need phone and reception/wifi
  - Must keep form short to ensure completion
  - Might have to walk them through scanning



# QR Code Signups

ission@pitzer.edu>

} - {{Start-Date-Time}}

{{'mobile_template' | snippet: "header"}}

Hi {{Form-Event-User-1-First}}

Students may use this QR code to register f
**{{Title}}**
{{Start-Date-Time}}
{{Event-QR-Code-link}}

You can also check for registrants here -
{{Internal-URL}}

{{'Admission' | snippet: "signature"}}

Fri 11/8/2019 10:28 AM

Pitzer College Admission <admission@pitzer.edu>

**QR Registration Code for Bonita High School Visit - 11/8/19 @ 1:45 PM**

To David Dysart




Hi Natalia

Students may use this QR code to register for the event instead of an inquiry card -
**Bonita High School Visit**
11/8/19 @ 1:45 PM
http://chart.apis.google.com/chart?cht=qr&chs=300x300&chl=https://connect.pitzer.edu/register/?id=6e947367-073c-40a5-9633-ab42d656a81a

You can also check for registrants here -
https://connect.pitzer.edu/manage/form/form?id=6e947367-073c-40a5-9633-ab42d656a81a




**Testing Widget**
**2/28/18 @ 12:00 AM**
**Use this QR code to sign-in for this visit! Signing in makes sure you get Demonstrated Interest credit for your application—that could help you to get accepted later.**
**TO USE:**

1. Open phone camera
2. Point it at the QR code
3. Wait for a link to pop up at the top of your screen
4. Make sure to COMPLETE and SUBMIT the form right now! Show me your confirmation page when you're done

**If it doesn't work**, let me know and I'll give you a physical card to fill out!

# QR Code Signups

Exports

| Title | |
|---|---|
| Start Date/Time | **Display Part** |
| URL | Status: Active |
| Event QR Code link | Name: Event QR Code link |
| Internal URL | Source: Custom SQL |
| Form/Event User 1 First | SQL: (select 'http://chart.apis.google.com/chart?cht=qr&chs=300x300&chl=' + (select [value] from [config] where ([key] = 'https')) + '/register/' + (coalesce(f.[alias], ('?id=' + dbo.toGuidString(f.[id])))) |
| Form/Event User 1 Email | |

```
<a href="{{Event-QR-Code-link}}"><img alt="" src="{{Event-QR-Code-link}}" /></a>
```

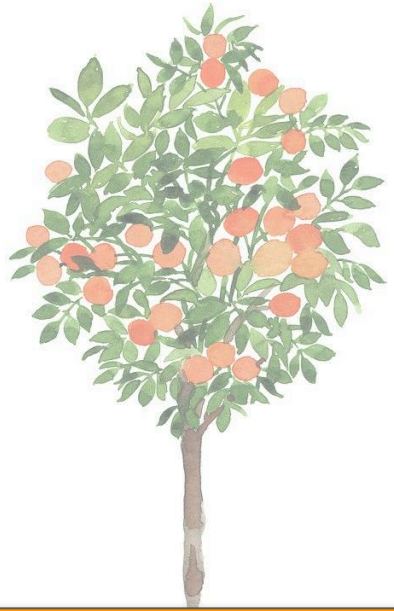


# QR Code Signups

| | |
|---|---|
| Page Title | College Fair - Dahveed's School of Slate Wizardry |
| Internal Name (optional) | |
| Template | College Fair Template |
| Folder | College Fairs / |
| Realm | Inherit: Admission |
| Status | Confirmed/Active |
| Date | 05/09/2022 Time 11:00 AM until 05/09/2022 Time |
| Deadline | 05/09/2022 Time 01:15 PM Activation Date 05/09/2022 |

**CBO, College Fairs, School Visit**

| Template | Title | Start Date/Time | End Date/Time | Deadline | User |
|---|---|---|---|---|---|
| College Fair Template | College Fair - Dahveed's School for Gifted Slaters | 05/24/22 @ 11:00 AM | 05/24/22 @ 01:00 PM | | David |
| College Fair Template | College Fair - Dahveed's School of Slate Wizardry | 05/23/22 @ 11:00 AM | 05/23/22 @ 01:00 PM | 05/23/2022 01:15 AM | David |



# QR Code Signups

Filters Matching Rows: 0

Template IN CBO Visit Template, College Fair Template, Group Visit Atter

Date >= today

Status IN Confi

(

Null Deadline

OR

Early Deadline

)

**Edit Part**

Status: Active

Name: Null Deadline

Source: Custom SQL

SQL: (f.[Deadline] is null)

**Edit Part**

Status: Active

Name: Early Deadline

Source: Custom SQL

SQL:
```
(convert(date, f.[date]) >=
convert(date, f.[Deadline]))
```

Form/Event

Export

Next

| Title | Start Date/Time | End Date/Time | Deadline |
|---|---|---|---|
| College Fair - Dahveed's School for Gifted Sla... | 05/24/22 @ 11:00 AM | 05/24/22 @ 01:00 PM | |
| College Fair - Dahveed's School of Slate Wiza... | 05/23/22 @ 11:00 AM | 05/23/22 @ 01:00 PM | 05/23/2022 01:15 AM |

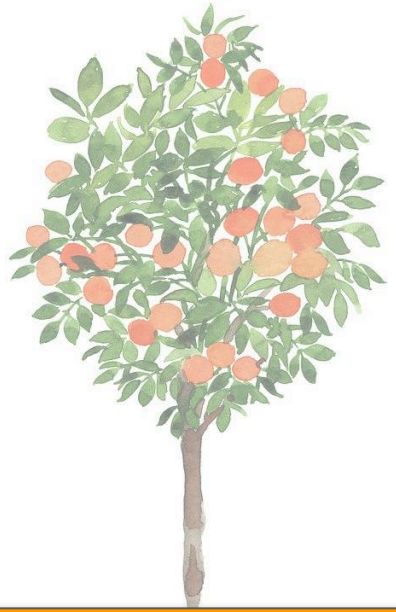
**Form/Event Management**

Records Affected: 2

Form/Event Property: Deadline (Relative)

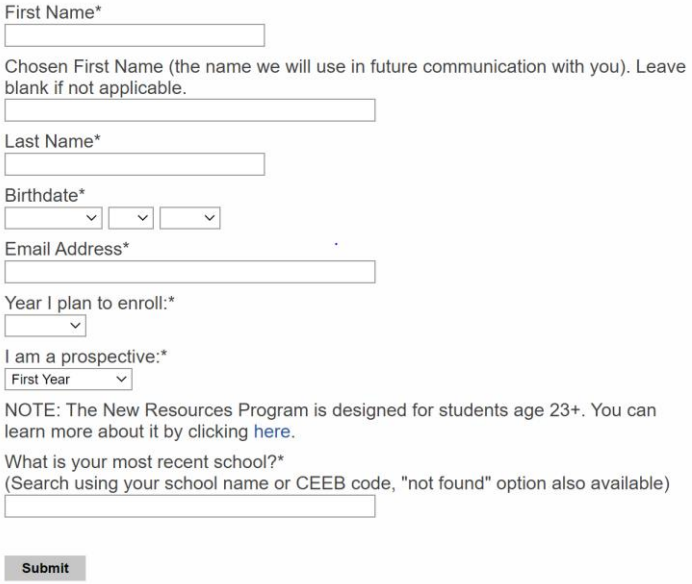
Deadline (Relative): -24

Enter the number of hours prior to the start of the event.



# QR Code Signups

## Event Form




## Confirmation Page Redirect

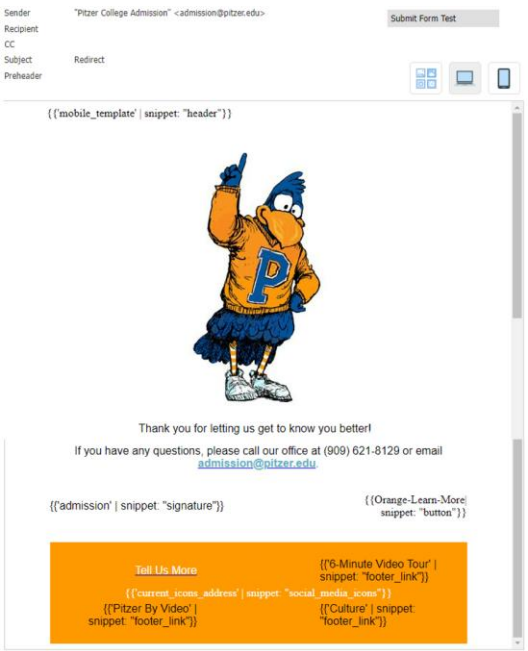
```
<script>FW.Navigate('https://connect.pitzer.edu/register/TellUsMore/?person={{Prospect-ID}}');</script>
```

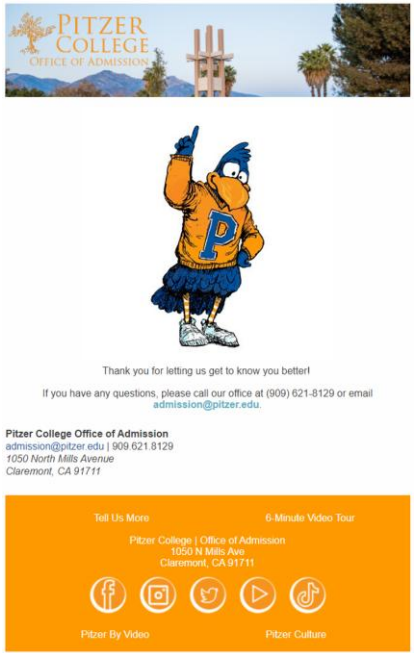
## Confirmation Page Delayed Redirect

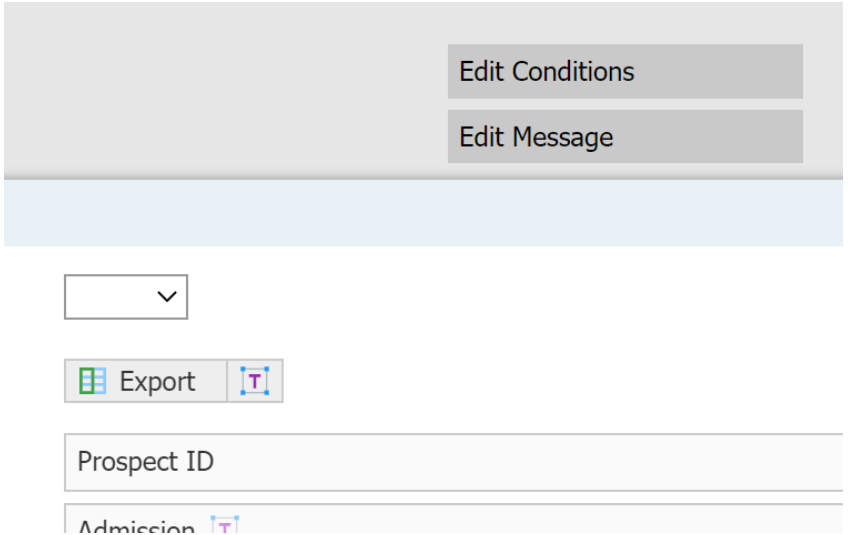
```
<script type="text/javascript">var delay = 10000; setTimeout(function(){ window.location = 'https://connect.pitzer.edu/register/TellUsMore/?person={{Prospect-ID}}'; }, delay);</script>
```

# QR Code Signups

## Confirmation Page

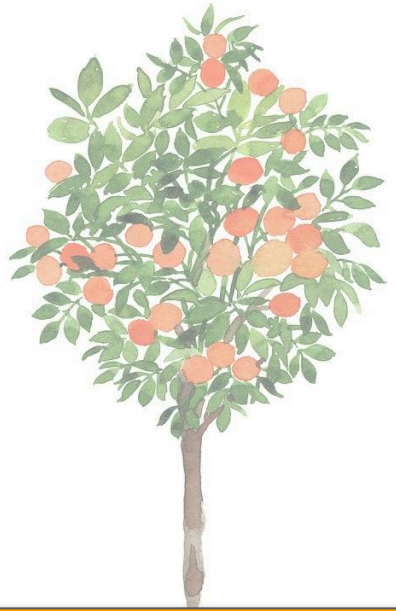


# Staff Emails

- Common, recurring emails to Admission Staff and external offices.
- Some of these emails communicate year and/application round-specific dates, so we pipe in the Content Block with our relevant dates.
- The email uses a similar but message-specific export formula to pull the correct date.
- The Deadline Content Block is also a good resource for staff to reference.



# Staff Emails

*Form*

Mailing

Committee Reports - David Notice

Mailing

- Decision Letter: Housing
- Incoming Students: Housing
- Committee: ISP Recs
- Decision Release: Admitted Student Page
- (●) Committee Reports - David Notice
- Committee Reports - Yvonne and Santiago
- Staff Birthdays
- Late Commits

Emails

david_dysart@pitzer.edu

CC Emails

palomb@pitzer.edu

Sender Email

- "Paloma Barragan" <Paloma_Barraganzepeda@pitzer.edu>
- "David Dysart" <David_Dysart@pitzer.edu>
- (●) "Enrollment Systems" <EnrollmentSystems@pitzer.edu>

*Email Export Formula*

Round_Name Σ
adm_page_deadline Σ
housing_dec_letter_deadline Σ
isp_recs_deadline Σ
Enrollment Systems Analyst T

Formula

current_date_month

```
'adm_page_' +
Case when @current_date_month in ('11') then 'ed1'
when @current_date_month in ('01') then 'ed2'
```

*Content Blocks*

adm_page_rd
adm_page_sptr
app_ed1
app_ed2
app_fatr
app_nr
app_rd
app_sptr
com_ed1

B I U S

November 15

# Staff Emails

*Email*

**Edit Message**

Sender {{Sender}} Reply To {{Sender}}

Recipient {{Emails}}

CC {{Cc_Emails}}

Subject Admitted Student Page Edits and Dates Needed for {{Round_Name}} Version 1

Preheader

Source

Format - Font - Size -

{{Season | snippet: "header"}}

Hi all,

We'll be updating our Admitted Student website for {{Round_Name}}. Can you please send me the relevant dates and any edits by {{adm_page_deadline | snippet: "admission_deadlines"}}/{{Current-Year}}

- Move-In Day/Orientation Adventure
- Fall Semester Classes Begin
- Fin Aid Appeals
- Etc.

Our Admitted Student page in case we've missed or need any corrections in regards to your office – https://www.pitzer.edu/admission/admission/admitted/

aloma Barragan" <Paloma_Barraganzepeda@pitzer.edu> Reply To "Paloma Barragan" <Paloma_Barraganzepeda@pitzer.edu>

@pitzer.edu, @pitzer.edu, @pitzer.edu, @pitzer.edu,
@pitzer.edu, pitzer.edu, @pitzer.edu

vid_dysart@pitzer.edu, paloma_barraganzepeda@pitzer.edu

lmitted Student Page Edits and Dates Needed for RDs




Hi all,

We'll be updating our Admitted Student website for RDs. Can you please send me the relevant dates and any edits by 3/7/22?

- Move-In Day/Orientation Adventure
- Fall Semester Classes Begin
- Fin Aid Appeals
- Etc.

Our Admitted Student page in case we've missed or need any corrections in regards to your office – https://www.pitzer.edu/admission/admission/admitted/

Thanks,

**Paloma Barragan**
Enrollment Systems Analyst
Enrollment Systems
Pitzer College

# High School Counselors

- We have begun to identify other helpful emails for High School Counselor
    - Upcoming Visit Student Listing
    - Applicants with missing materials

# High School Counselors

- Upcoming Visit – Listing Interested Students

Hi {{Organization-Contacts-First-Name}}, {% if {{list_students}...

I'm reaching out to connect with you about my upcoming visit at {{Form-Location}}. While we don't have any students in our system from your school currently, we are hoping you can let any students who might be interested or a great fit for Pitzer know about our upcoming visit on **{{Form-Start-Date}}** at **{{Form-Start-Time}}**. Additionally, I'm looking forward to meeting with you or a member of your team to chat should no students be available during the visit. {% endif %} {% if {{list_students}...

The following list of students from {{Form-Location}} have already shown us interest in Pitzer College. Please remind these students of my upcoming visit on **{{Form-Start-Date}}** at **{{Form-Start-Time}}** and looking forward to connecting with your students soon!
{{'school_rep_interested_students' | snippet: "dictionary"}} {% endif %}

Sincerely,

{{User-Full-Name | snippet: "signature_image"}}

Upcoming School Visit - 10/10/22

Interested Students

The following list of students from Dahveed's School of Slate Wizardry have already shown us interest in Pitzer College. Please remind these students of my upcoming visit on **10/10/22** at **10:00 AM** and looking forward to connecting with your students soon!

| Name | Status | Graduation Year |
|---|---|---|
| Dysart_test, David_test (Dahveed) | Applicant | 2024 |
| Dysart, Dahveed | Applicant | 2023 |

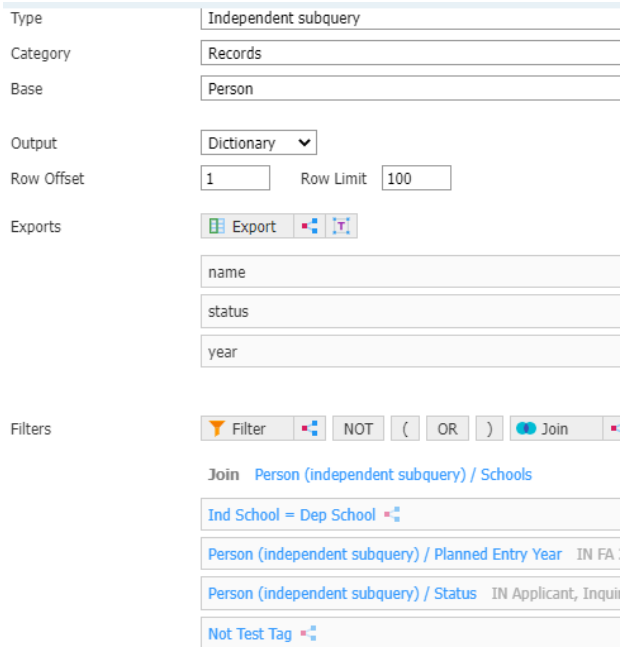
Sincerely,

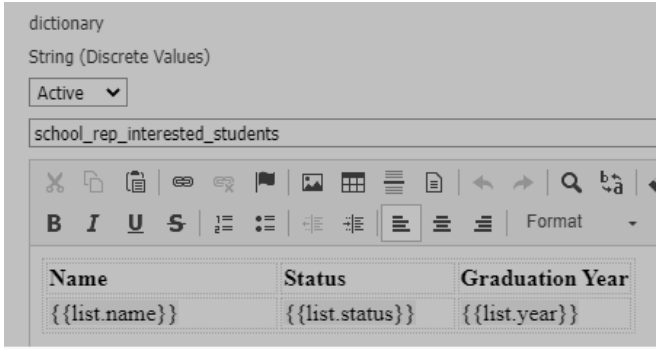


**David Dysart**
Associate Director
Pitzer College | Office of Admission
1050 North Mills Avenue
Claremont, CA 91711

# High School Counselors

- Upcoming Visit – Listing Interested Students




Source

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <table>
   <thead>
    <tr>
     <th style="text-align: left;" width="40%">Name</th>
     <th style="text-align: left;" width="30%">Status</th>
     <th style="text-align: left;" width="30%">Graduation Year</th>
    </tr>
   </thead>
   <tbody>{% for list in list_students %}
    <tr>
     <td style="vertical-align:top">{{list.name}}</td>
     <td style="vertical-align:top">{{list.status}}</td>
     <td style="vertical-align:top">{{list.year}}</td>
    </tr>
    {% endfor %}
   </tbody>
  </table>
 </body>
</html>
```

# High School Counselors

- Applicants with missing materials

can check additional details and upload certain documents at Slate.org

{{'school_rep_student_list' | snippet: "dictionary"}}

Please refer to the deadlines of materials

| Round | Admission | Financial Aid |
|---|---|---|
| Early Decision 1 | {{'ops_external_ed1' \| snippet: "admission_deadlines"}} | {{'fin_aid_external_ed1' \| snippet: "fin_aid_deadlines"}} |
| Early Decision 2 | {{'ops_external_ed2' \| snippet: "admission_deadlines"}} | {{'fin_aid_external_ed2' \| snippet: "fin_aid_deadlines"}} |
| Regular Decision | {{'ops_external_rd' \| snippet: "admission_deadlines"}} | {{'fin_aid_external_rd' \| snippet: "fin_aid_deadlines"}} |

upload certain documents at Slate.org

| Student | Round | Outstanding Items |
|---|---|---|
| Dysart_test, David_test (Dahveed) | 2023 Early Decision 1 | - Academic Recommendation 1<br>- Early Decision Agreement |
| Dysart, Dahveed | 2023 Regular Decision | - FAFSA<br>- High School Transcript (through<br>- High School Transcript - Mid Ye available) |

Please refer to the deadlines of materials

| Round | Admission | Financial Aid |
|---|---|---|
| Early Decision 1 | November 17th | November 15th |
| Early Decision 2 | January 19th | January 6th |
| Regular Decision | February 16th | January 6th |

# Dynamic Data in Event Communications

Virtual Flyer - Entirely Slate




Designed Background w/Slate



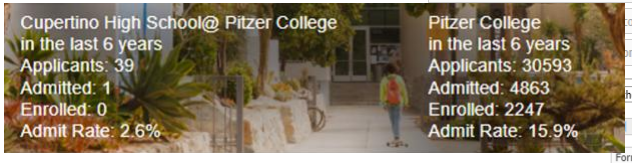

Embedded Data in emails






# Dynamic Data in Eve

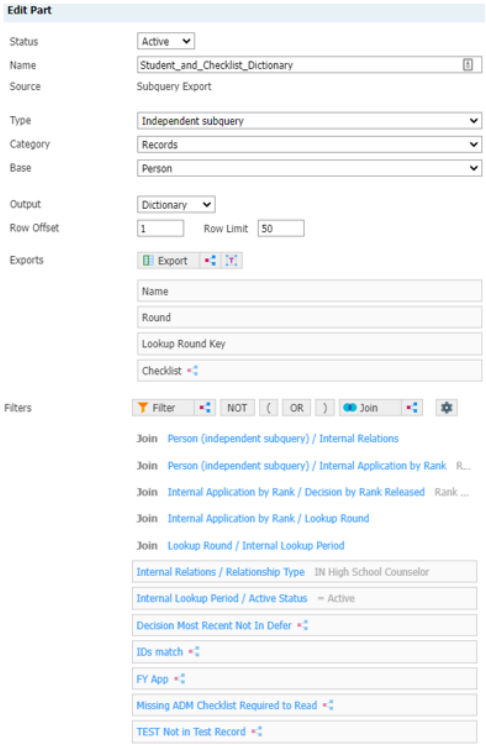
- T

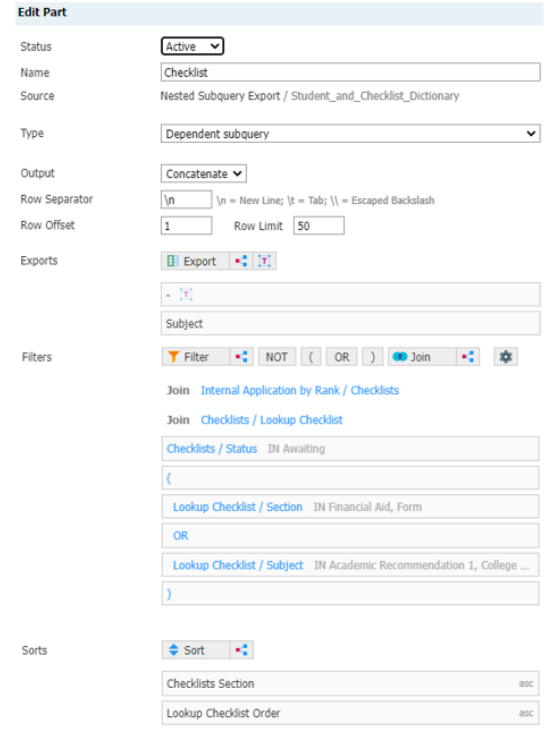


# High School Counselors

**Source**

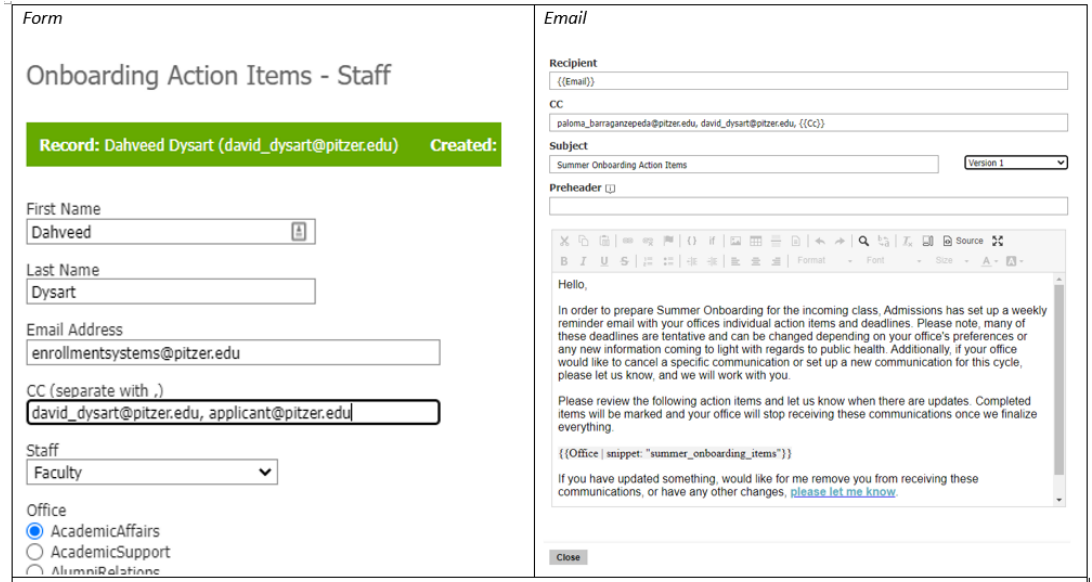
```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <table border="1" cellpadding="3" cellspacing="0" style="width:100%;">
   <thead>
    <tr>
     <th style="text-align: left;" width="25%">Student</th>
     <th style="text-align: left;" width="25%">Round</th>
     <th style="text-align: left;" width="50%">Outstanding Items</th>
    </tr>
   </thead>
   <tbody>{% for list in Student_and_Checklist_Dictionary %}
    <tr>
     <td style="vertical-align:top">{{list.name}}</td>
     <td style="vertical-align:top">{{list.round}}</td>
     <td style="vertical-align:top">{{list.Checklist}}</td>
    </tr>
    {% endfor %}
   </tbody>
  </table>
 </body>
</html>
```



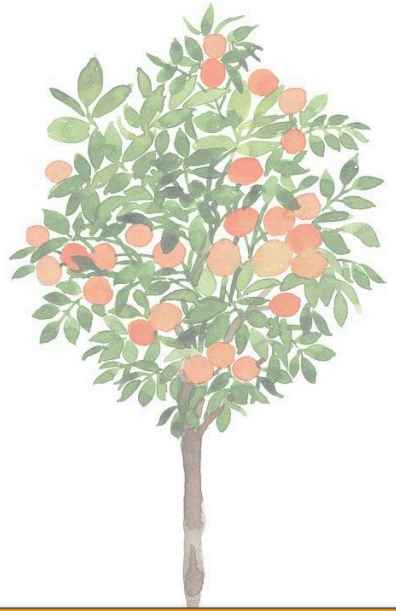
# Summer Onboarding

- Admission manages onboarding communications or other tasks to new students
- Includes office like Student Affairs, Student Accounts, etc.
- We created a weekly email that reminds the offices of their action item, deadlines, and relevant links.



# College Fair Portals

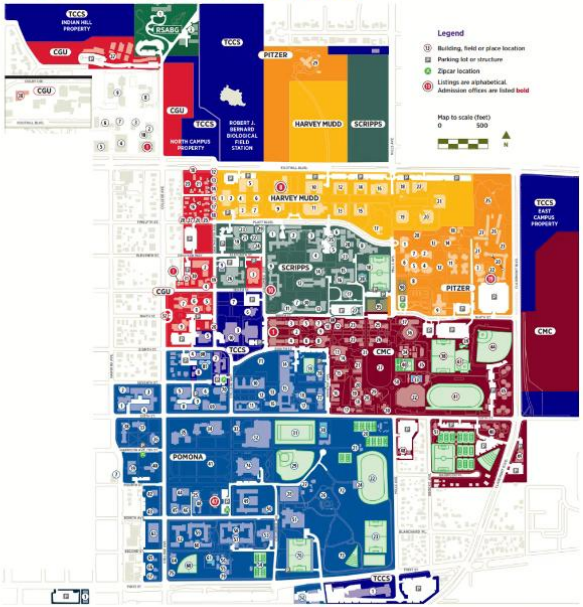
- Each of our Admission Counselors has an iPad they bring on travel
- They were torn between playing a Slideshow or the QR Code Signup or other content like a video
- Currently augmenting our Lobby TV Portal to display a slideshow, QR Code, and other content the counselor will want like their bio and a short video
- Currently a work in progress



# College Fair Portals

## Welcome to Pitzer College!

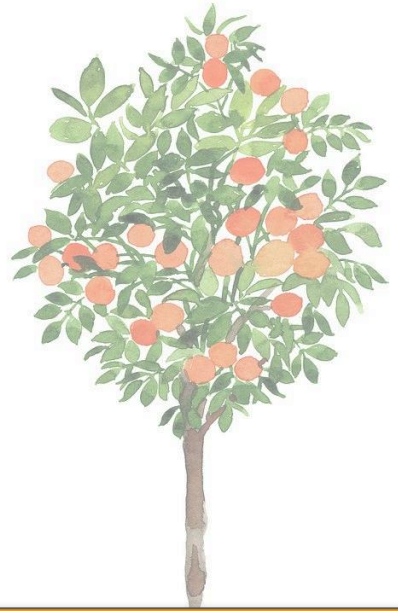
### Map of the Claremont Colleges




### Meet David Dysart

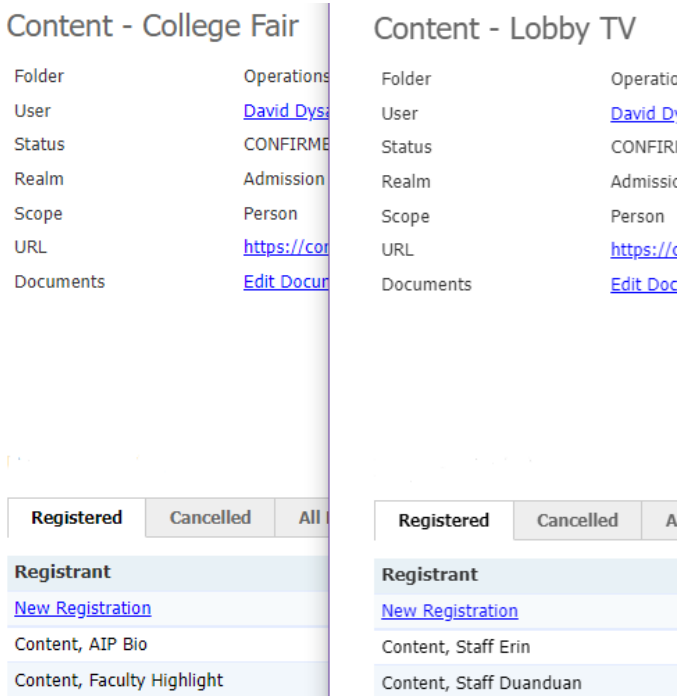
**Hometown:** San Bernardino, CA
**College Major:** Psychology
**Favorite Part of Pitzer:** My favorite part of Pitzer is the students' commitment to the core values of the institution, as well as the unique aspects of campus life, such as: the shared resources and student activities of the 5C's, the desert landscape, the Grove House, student-run dining, and more!

**Tell us you stopped by!**



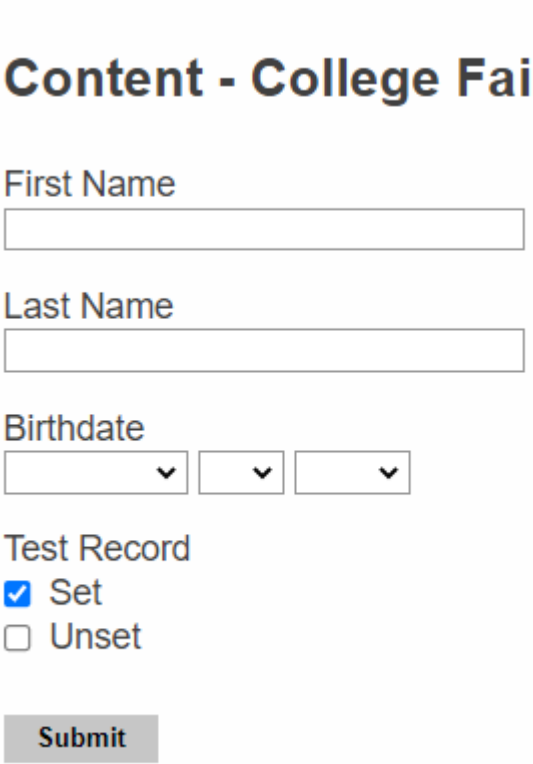
# College Fair Portals

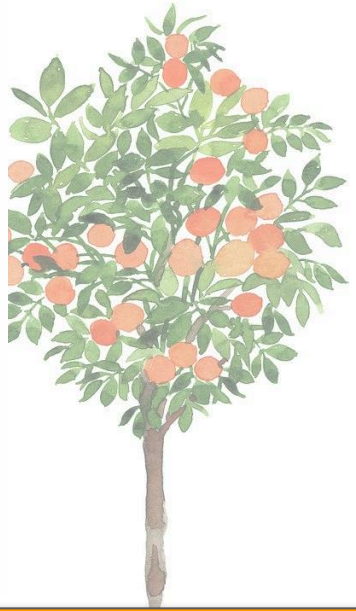
**Forms used to Populate Slideshow**





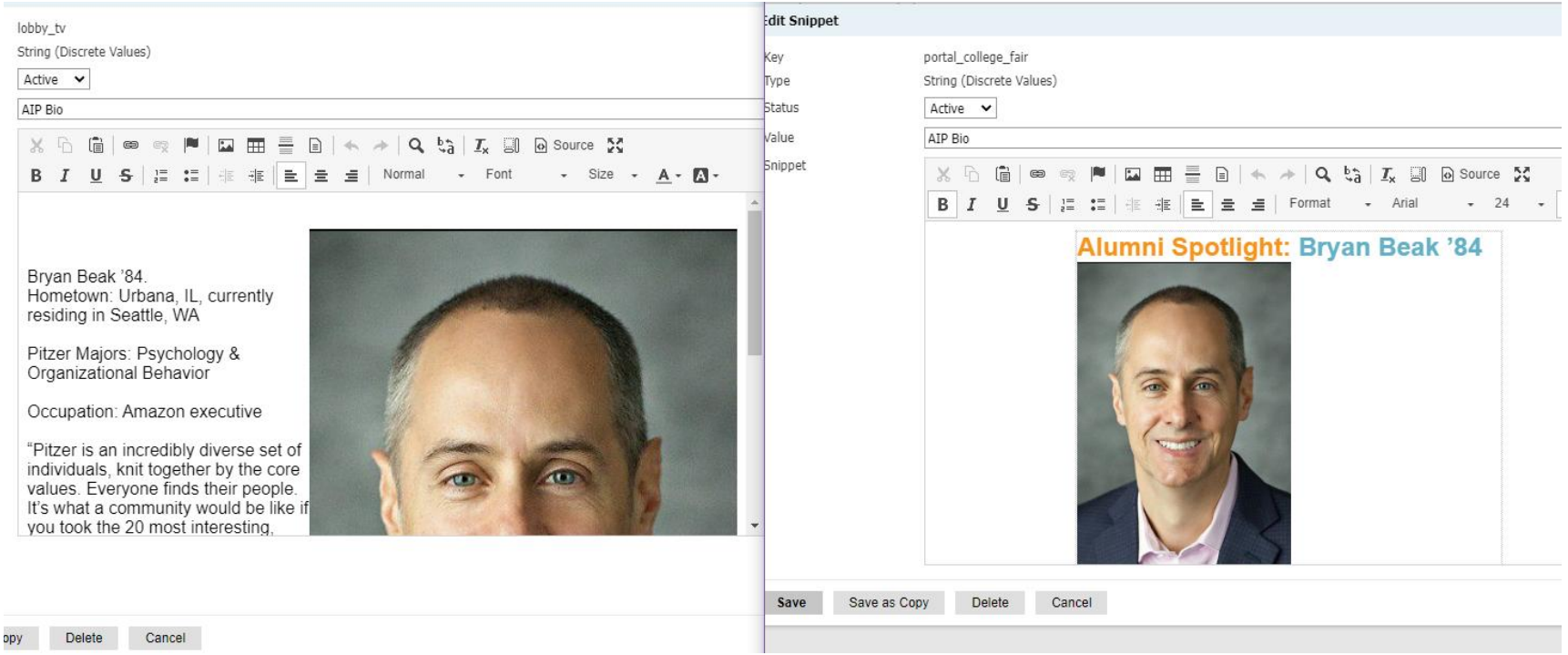




# College Fair Portals

## Content Blocks



# College Fair Portals

## Portal

Methods

| Method |
| --- |
| New Method |
| Home |

Views

| Name |
| --- |
| New View |
| Home |

Queries

| Query | Used By |
| --- | --- |
| New Query | |
| Current Time | 1 Method : Home |
| QR Code | 1 Method : Home |
| Snippet Slideshow | 1 Method : Home |

Reports

| Report |
| --- |
| New Report |
| Today's Events |

## View

**CF Snippet Slideshow**

```
{% for result in visitors %}
{{result.name | snippet:
"portal_college_fair"}}
{% endfor %}
```

**rep**

Your Representative: {{User_N

{{User_Name | snippet:
"counselor_cod_lobby"}}

**QR Code**

Tell us you stopped by!

**QR Code**

**Looping Youtube Video**



# College Fair Portals

## Slideshow HTML

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
  <style type="text/css">.mySlides {display:none;}
  </style>
 </head>
 <body>
  {% for result in visitors %}
  <div class="mySlides">
   {{result.name | snippet: "portal_college_fair"}}
  </div>
  {% endfor %}<script>
var myIndex = 0;
carousel();

function carousel() {
 var i;
 var x = document.getElementsByClassName("mySlides");
 for (i = 0; i < x.length; i++) {
  x[i].style.display = "none";
}
 myIndex++;
 if (myIndex > x.length) {myIndex = 1}
 x[myIndex-1].style.display = "block";
 setTimeout(carousel, 5000); // Change image every 5 seconds
}
</script><b></b><b></b><meta name="viewport"
                    content="width=device-width,
 initial-scale=1" />
  <meta content="text/html; charset=us-ascii" http-equiv="Content-Type" />
 </body>
 <link href="https://www.w3schools.com/w3css/4/w3.css" rel="stylesheet" />
</html>
```

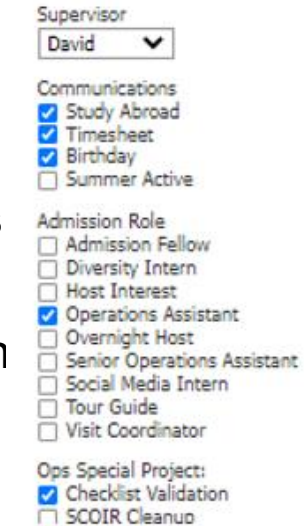
## Video HTML

```
1  <html xmlns="http://www.w3.org/1999/xhtml">
2   <head>
3    <title></title>
4   </head>
5   <body>
6    <iframe allow="accelerometer; autoplay; clipboard-write; encrypted-
   media; gyroscope; picture-in-picture"
7           allowfullscreen="allowfullscreen" frameborder="0" height="315"
8           src="https://www.youtube.com/embed/PiUd-OeQ2S0?
   controls=0&amp;autoplay=1&amp;mute=1&amp;loop=1&amp;&amp;playlis
   t=PiUd-OeQ2S0"
9           title="YouTube video player" width="420"></iframe>
10  </body>
11 </html>
12
```

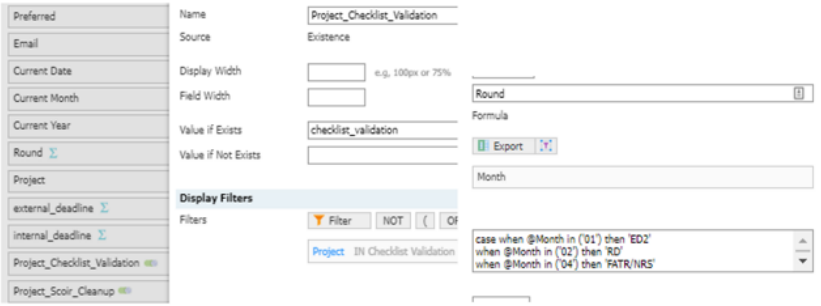
# Student Worker Tasks

- 3-4 Operations student workers.
- Only some are trained on recurring projects.
- We use a similar setup as our Onboarding process to prompt them to work on these projects per Round on given dates by certain deadlines

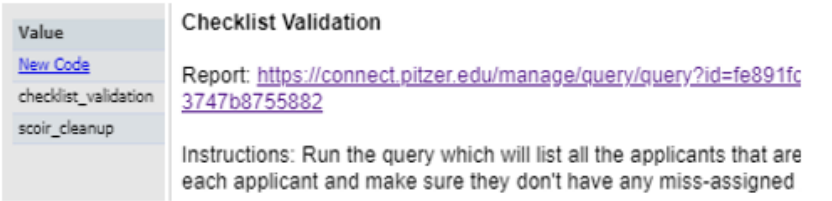
*Form*



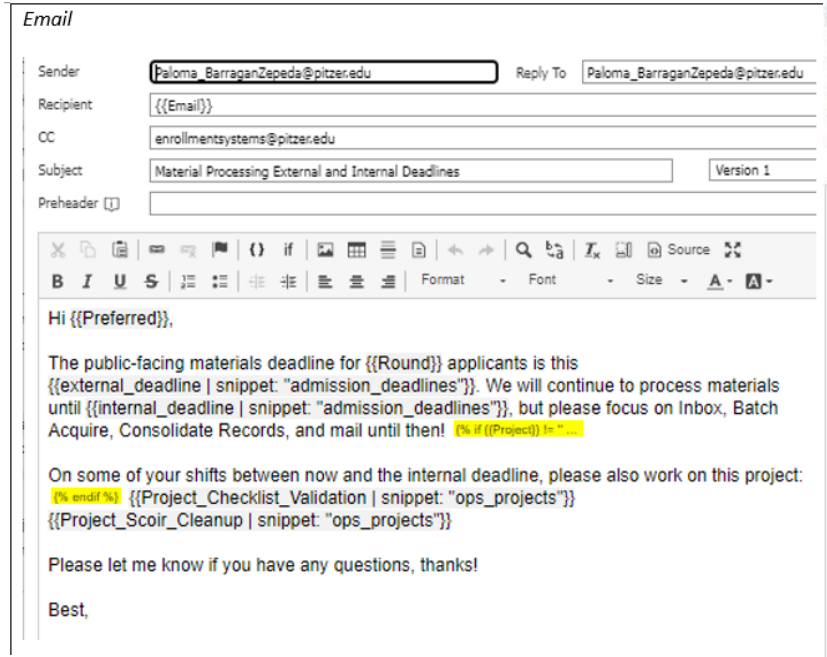

*Email Export Formula*

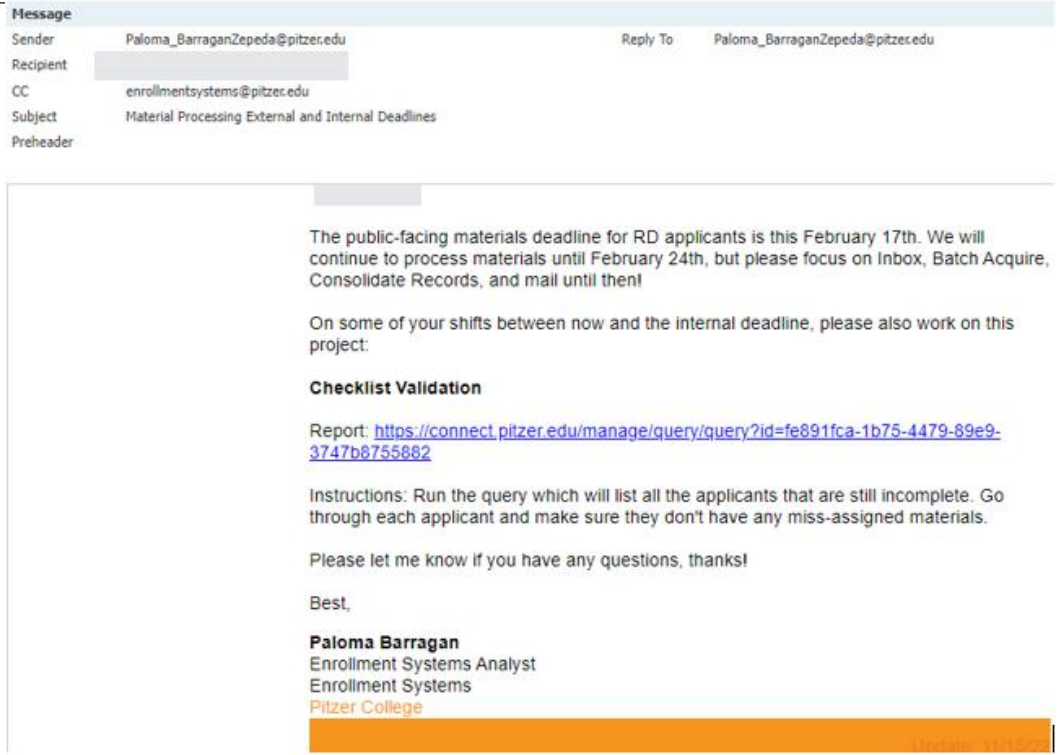



*Content Blocks*



# Student Worker Tasks



# Keeping Student Workers in the Loop

- Excluding communication opt-outs and students out for the semester/summer
- Email and text our student workers and dorm show room students

**Office**
- Confidentiality and Code of Conduct agreements
- Training and event notification and reminders

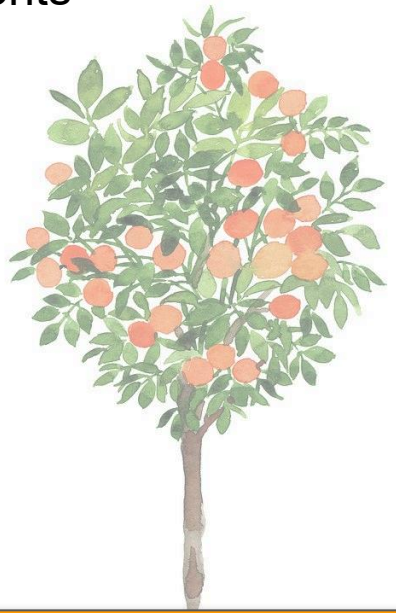
**Tours**
- Tour Guide with the # of people signed up and where they are coming from/majors
- Student Worker at the front desk (they will take half the group if it's a lot of visitors)

**Interviews**
- Student details
- Link to the Interview Report Form
- What office they'll be in (User 2)
- Staff/Alumni Interviewer – Outstanding Report hasn't been submitted

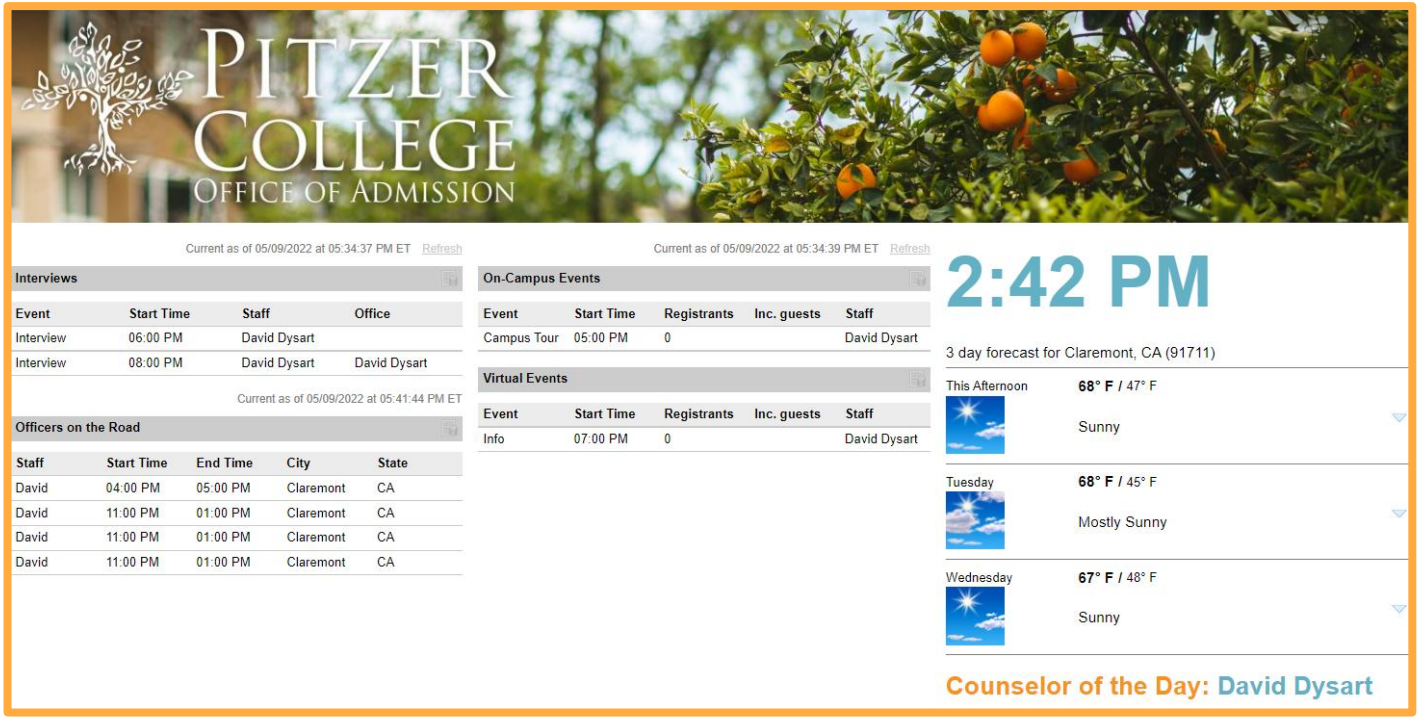
**Upcoming Interviews and Information Sessions**
Weekly Report that tells the workers when they'll have interviews and information sessions as well as current registrant numbers

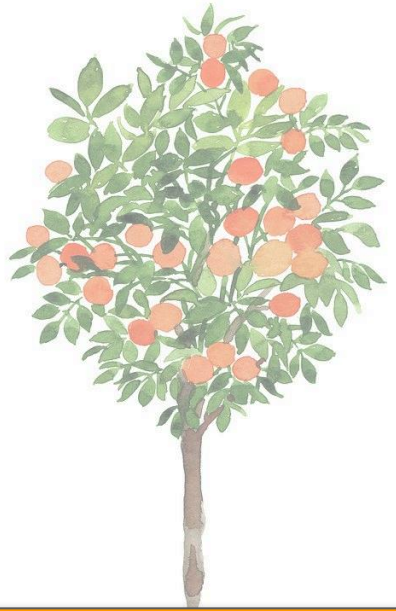
**Overnight**
- Texts to the prospective student and Overnight host
- Moving from the Waitlist, Cancelations, Reminders

**Texts**
- Happy Birthday
- Timesheet Reminder
- Tour Dorm Room Student – Time and # of guests that will be coming
- Reminder for Saturday Student workers



# Student Worker Portal



# Student Worker Portal

## Time

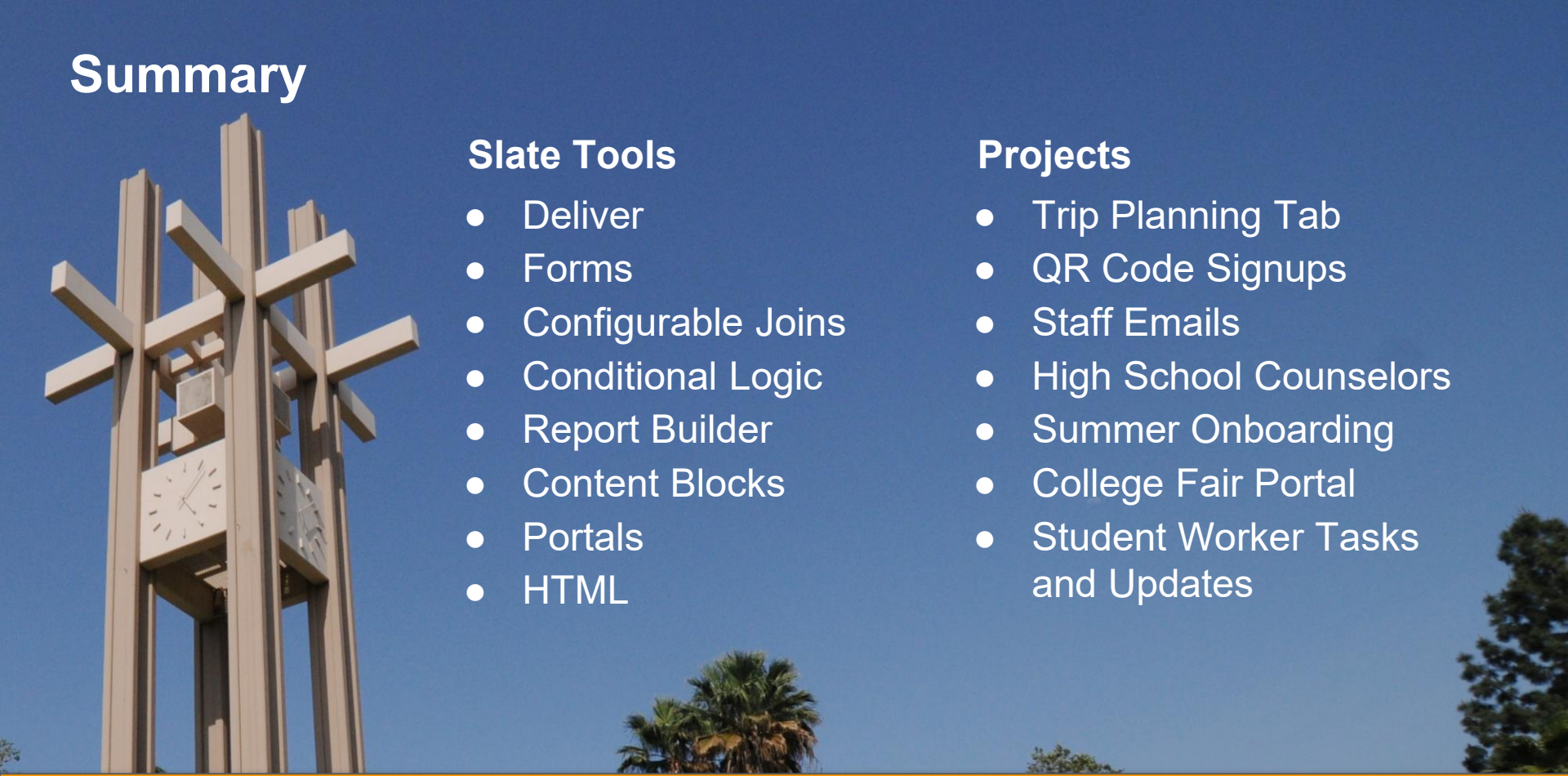
```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <div id="clockbox" style="font:80pt Arial; color:#64b0c4; font-weight: bold;">
  </div>
  <script type="text/javascript">function GetClock(){
var d=new Date();
var nhour=d.getHours(),nmin=d.getMinutes(),ap;
if(nhour==0){ap=" AM";nhour=12;}
else if(nhour<12){ap=" AM";}
else if(nhour==12){ap=" PM";}
else if(nhour>12){ap=" PM";nhour-=12;}

if(nmin<=9) nmin="0"+nmin;

var clocktext=""+nhour+":"+nmin+ap+"";
document.getElementById('clockbox').innerHTML=clocktext;
}

GetClock();
setInterval(GetClock,1000);</script>
 </body>
</html>
```

# Summary



## Slate Tools

- Deliver
- Forms
- Configurable Joins
- Conditional Logic
- Report Builder
- Content Blocks
- Portals
- HTML

## Projects

- Trip Planning Tab
- QR Code Signups
- Staff Emails
- High School Counselors
- Summer Onboarding
- College Fair Portal
- Student Worker Tasks and Updates

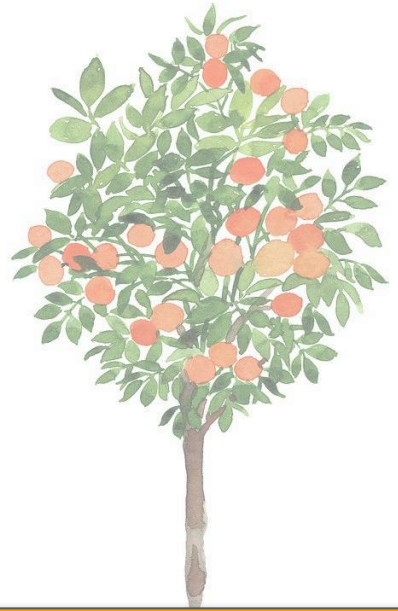
# Briefcases and Resources

- https://www.pitzer.edu/admission/pitzer_resource_communications

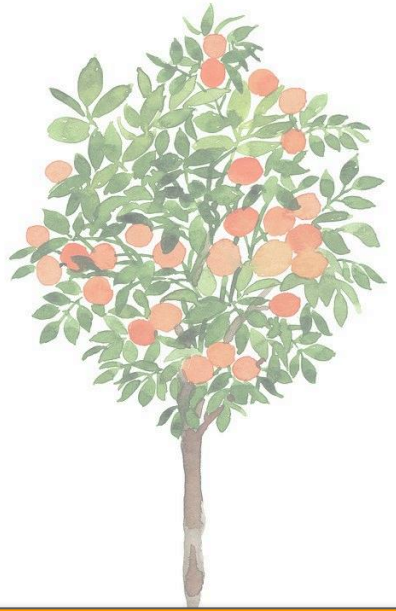


# Questions?

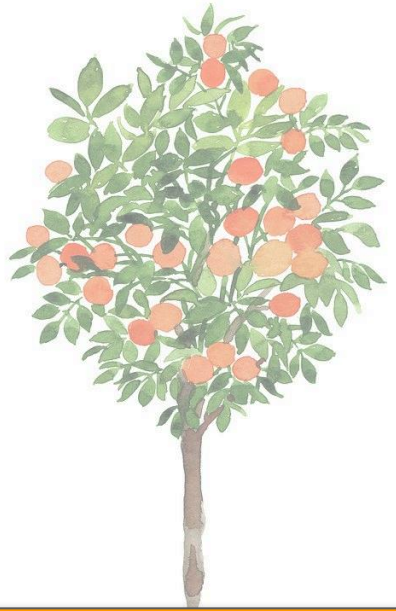
**David Dysart**, Associate Director of Enrollment Systems
David_Dysart@Pitzer.edu



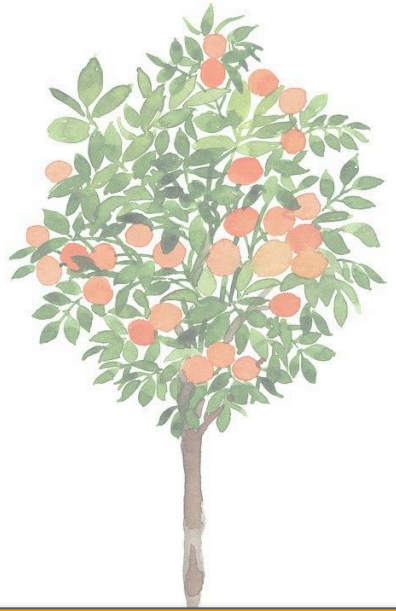
# TITLE



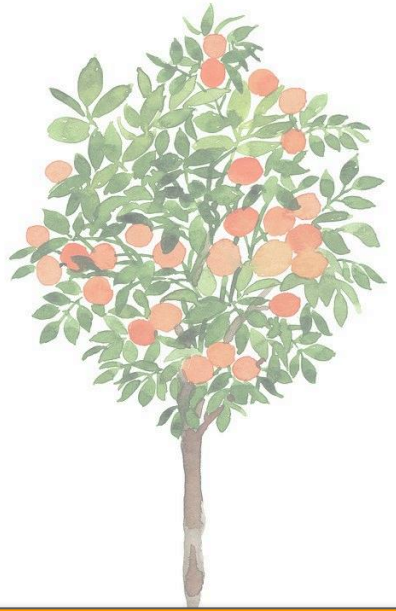
# Late Commit



# Gap Year Requests



# Lobby and Student Worker Portals



# Keeping Student Workers in the Loop

**Office**
- Confidentiality and Code of Conduct agreements
- Training and event notification and reminders

**Tours**
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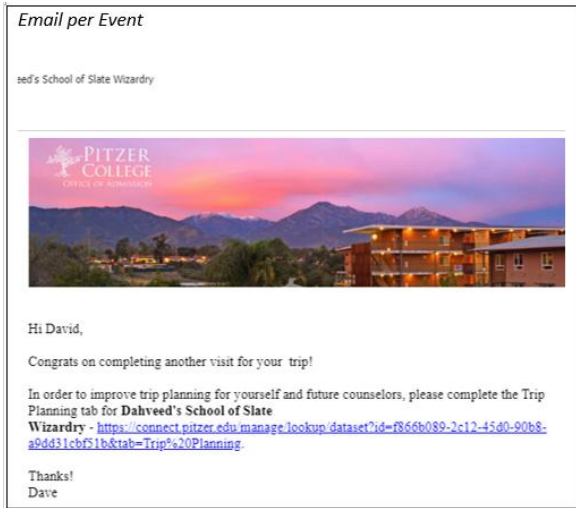
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- Moving from the Waitlist, Cancelations, Reminders

**Texts**
- Happy Birthday
- Timesheet Reminder
- Tour Dorm Room Student – Time and # of guests that will be coming
- Reminder for Saturday Student workers

# Trip Planning

- Turnover each summer/changing territory
- Lost institutional knowledge of School/CBO Visits and College Fairs
- Added a Trip Planning Tab to track Scheduling method, material #s as well as trip and school and counselor info
- Emails and Reports to complete the entry

*Email per Event*



ed's School of Slate Wizardry

Hi David,

Congrats on completing another visit for your trip!

In order to improve trip planning for yourself and future counselors, please complete the Trip Planning tab for **Dahveed's School of Slate Wizardry** - https://connect.pitzer.edu/manage/lookup/dataset?id=f866b089-2c12-45d0-90b8-a9dd31cbf51b&tab=Trip%20Planning.

Thanks!
Dave

*Email with Multiple Events*



Hi David,

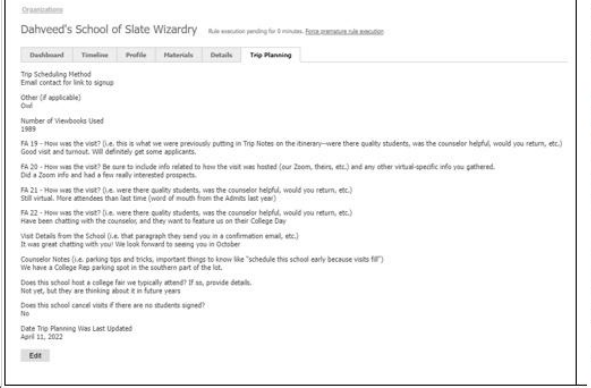
Please visit the Trip Planning Report and complete the Planning Tabs for your events - https://connect.pitzer.edu/manage/report/render?id=0d9a7fd1-67d0-41f9-b999-ec439d5ea959

Your can also find your Trip Planning tabs for today below

Dahveed's School of Slate Wizardry https://connect.pitzer.edu/manage/lookup/dataset?id=F866B089-2C12-45D0-90B8-A9DD31CBF51B&tab=Trip%20Planning

Dahveed's School for Gifted Slaters https://connect.pitzer.edu/manage/lookup/dataset?id=A2D69E26-4DB0-4B0C-ADA0-49B13D029F76&tab=Trip%20Planning

*Organization Tab*



Dahveed's School of Slate Wizardry

Dashboard | Timeline | Profile | Materials | Details | Trip Planning

Trip Scheduling Method
Email contact for link to signup

Other (if applicable)
Owl

Number of Viewbooks Used
1989

FA 19 - How was the visit? (i.e. this is what we were previously putting in Trip Notes on the itinerary--were there quality students, was the counselor helpful, would you return, etc.)
Good visit and turnout. Will definitely get some applicants.

FA 20 - How was the visit? Be sure to include info related to how the visit was hosted (our Zoom, theirs, etc.) and any other virtual-specific info you gathered.
Did a Zoom info and had a few really interested prospects.

FA 21 - How was the visit? (i.e. were there quality students, was the counselor helpful, would you return, etc.)
Still virtual. More attendees than last time (word of mouth from the Admits last year)

FA 22 - How was the visit? (i.e. were there quality students, was the counselor helpful, would you return, etc.)
Have been chatting with the counselor, and they want to feature us on their College Day

Visit Details from the School (i.e. that paragraph they send you in a confirmation email, etc.)
It was great chatting with you! We look forward to seeing you in October

Counselor Notes (i.e. parking tips and tricks, important things to know like "schedule this school early because visits fill")
We have a College Rep parking spot in the southern part of the lot.

Does this school host a college fair we typically attend? If so, provide details.
Not yet, but they are thinking about it in future years

Does this school cancel visits if there are no students signed?
No

Date Trip Planning Was Last Updated
April 11, 2022

Edit

*Tab Report*



Trip Planning Tabs

Folder: Events
Current as of: 04/12/2022 at 11:54:15 AM ET
Status: Completed successfully.

**Today's events**

| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| Virtual School Visit - CMC | Claremont Mckenna College | 04/12 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=8fd07067-e2c3-ba6e-7299-586ed802e6f5&tab=Trip%20Planning |

**Last Week**

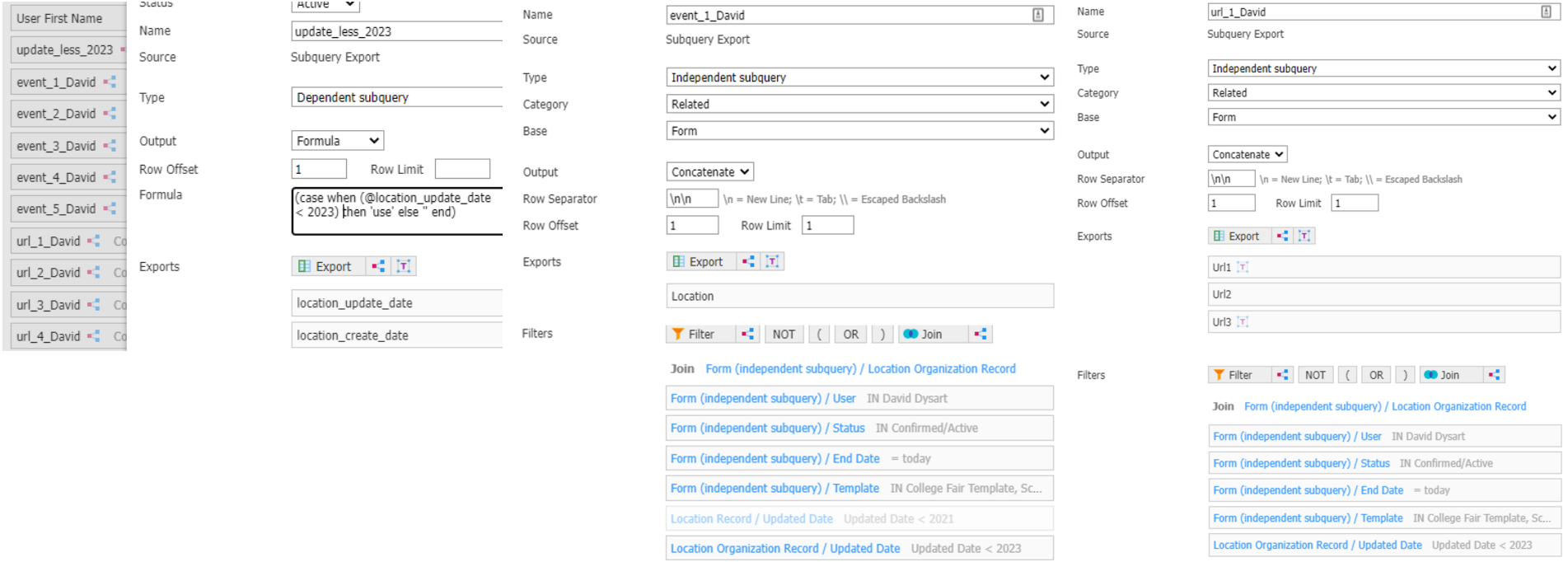
| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| Virtual School Visit - HMC | Harvey Mudd College | 04/11 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=70754b76-ad50-cbb4-8319-8fa91a62d0a8&tab=Trip%20Planning |
| Virtual College Fair - Scripps | Scripps College | 04/07 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=a9cf5492-f987-d657-2852-7ce28a8eefe6&tab=Trip%20Planning |

**Next Week**

| Form Title | School Name | Form Start Date/Time | Trip Planning Tab |
|---|---|---|---|
| School Visit - Pomona College | Pomona College | 04/14 @ 04:00 PM | https://connect.pitzer.edu/manage/loo... id=51db2960-25ec-ca3c-ece4-5daca2f6089a&tab=Trip%20Planning |
| College Fair - Pitzer | Harvey Mudd College | 04/18 @ 12:00 PM | https://connect.pitzer.edu/manage/loo... id=70754b76-ad50-cbb4-8319-8fa91a62d0a8&tab=Trip%20Planning |

# Trip Planning

- The Configurable Joins Rec List is bulky but does the job



# Staff Emails

*Form*

Mailing

Committee Reports - David Notice

Mailing

- Decision Letter: Housing
- Incoming Students: Housing
- Committee: ISP Recs
- Decision Release: Admitted Student Page
- (●) Committee Reports - David Notice
- Committee Reports - Yvonne and Santiago
- Staff Birthdays
- Late Commits

Emails

david_dysart@pitzer.edu

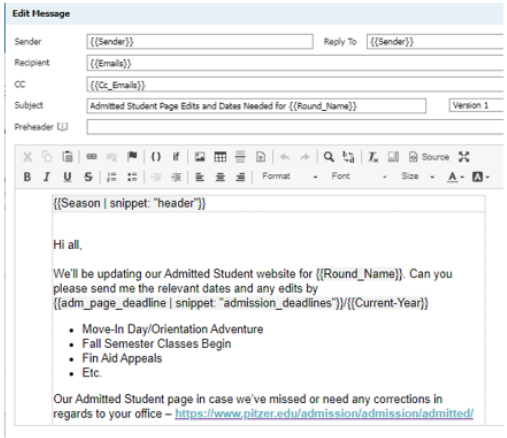
CC Emails

palomb@pitzer.edu

Sender Email

- "Paloma Barragan" <Paloma_Barraganzepeda@pitzer.edu>
- "David Dysart" <David_Dysart@pitzer.edu>
- (●) "Enrollment Systems" <EnrollmentSystems@pitzer.edu>

*Email*




*Email Export Formula*

Round_Name Σ

adm_page_deadline Σ

housing_dec_letter_deadline Σ

isp_recs_deadline Σ

Enrollment Systems Analyst T

Formula

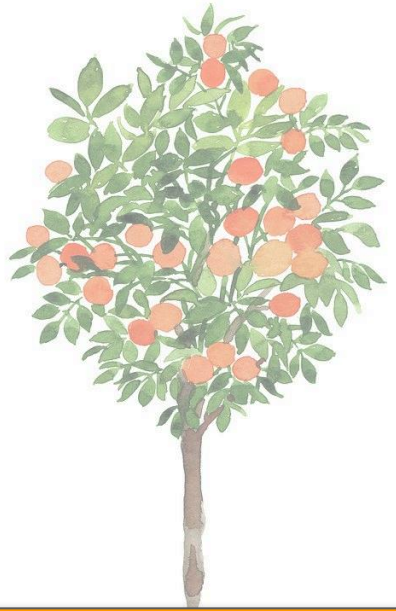
current_date_month

```
'adm_page_' +
Case when @current_date_month in ('11') then 'ed1'
when @current_date_month in ('01') then 'ed2'
```

*Content Blocks*

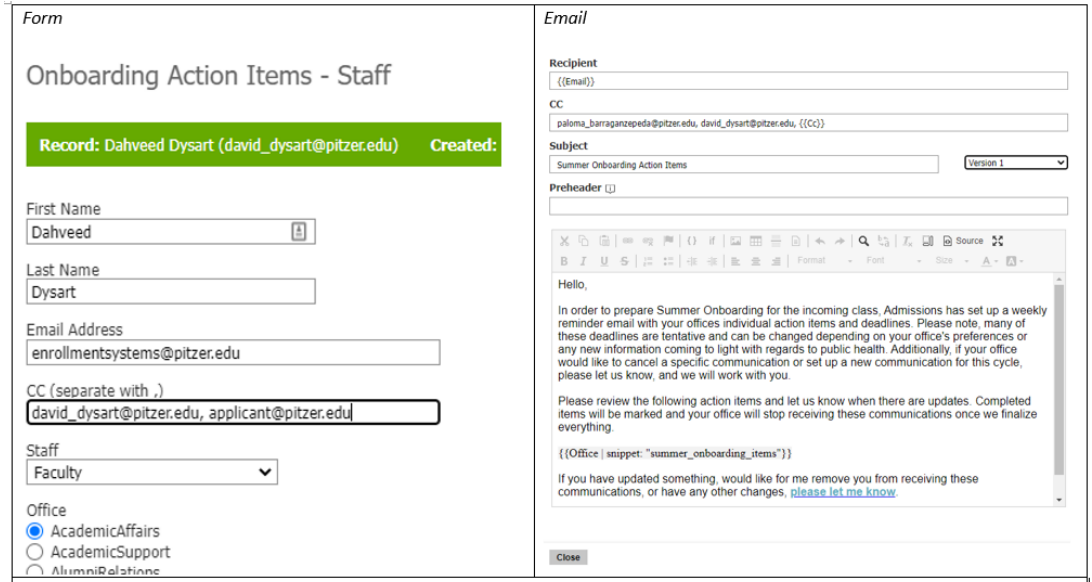
adm_page_rd
adm_page_sptr
app_ed1
app_ed2
app_fatr
app_nr
app_rd
app_sptr
com_ed1



# Summer Onboarding

- Admission manages onboarding communications or other tasks to new students
- Includes office like Student Affairs, Student Accounts, etc.
- We created a weekly email that reminds the offices of their action item, deadlines, and relevant links.



# College Fair Portals

## Slideshow HTML

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
  <style type="text/css">.mySlides {display:none;}
  </style>
 </head>
 <body>
  {% for result in visitors %}
  <div class="mySlides">
   {{result.name | snippet: "portal_college_fair"}}
  </div>
  {% endfor %}<script>
var myIndex = 0;
carousel();

function carousel() {
 var i;
 var x = document.getElementsByClassName("mySlides");
 for (i = 0; i < x.length; i++) {
   x[i].style.display = "none";
}
 myIndex++;
 if (myIndex > x.length) {myIndex = 1}
 x[myIndex-1].style.display = "block";
 setTimeout(carousel, 5000); // Change image every 5 seconds
}
</script><b></b><b></b><meta name="viewport"
                content="width=device-width,
 initial-scale=1" />
  <meta content="text/html; charset=us-ascii" http-equiv="Content-Type" />
 </body>
 <link href="https://www.w3schools.com/w3css/4/w3.css" rel="stylesheet" />
</html>
```

## Time

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <div id="clockbox" style="font:80pt Arial; color:#64b0c4; font-weight: bold;">
  </div>
  <script type="text/javascript">function GetClock(){
var d=new Date();
var nhour=d.getHours(),nmin=d.getMinutes(),ap;
if(nhour==0){ap=" AM";nhour=12;}
else if(nhour<12){ap=" AM";}
else if(nhour==12){ap=" PM";}
else if(nhour>12){ap=" PM";nhour-=12;}

if(nmin<=9) nmin="0"+nmin;

var clocktext=""+nhour+":"+nmin+ap+"";
document.getElementById('clockbox').innerHTML=clocktext;
}

GetClock();
setInterval(GetClock,1000);</script>
 </body>
</html>
```

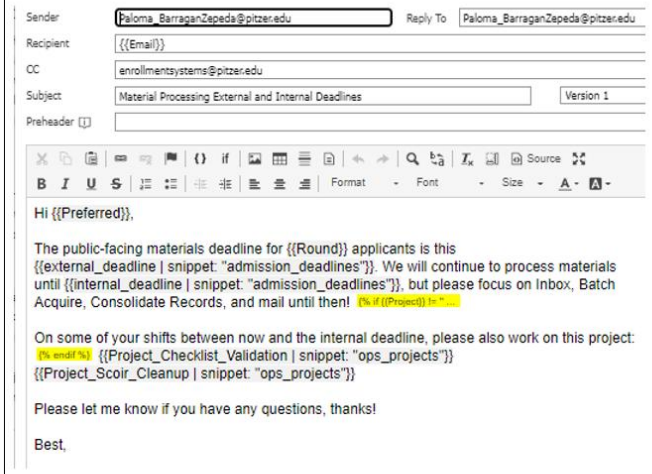
## Video HTML

```
<html xmlns="http://www.w3.org/1999/xhtml">
 <head>
  <title></title>
 </head>
 <body>
  <div style="text-align: center;">
   <iframe allow="accelerometer; autoplay; clipboard-write;
                encrypted-media; gyroscope; picture-in-picture"
          allowfullscreen="allowfullscreen" frameborder="0" height="262"
          src="https://www.youtube.com/embed/PiUd-OeQ2S0?
              controls=0&amp;
              autoplay=1&amp;
              mute=1&amp;
              loop=1&amp;&amp;
              playlist=PiUd-OeQ2S0"
          title="YouTube video player"
          width="350"></iframe>
  </div>
 </body>
</html>
```

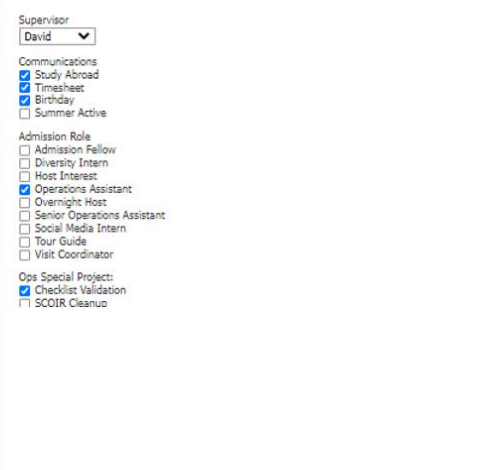
# Student Worker Tasks

- 3-4 Operations student workers.
- Only some are trained on recurring projects.
- We use a similar setup as our Onboarding process to prompt them to work on these projects per Round on given dates by certain deadlines

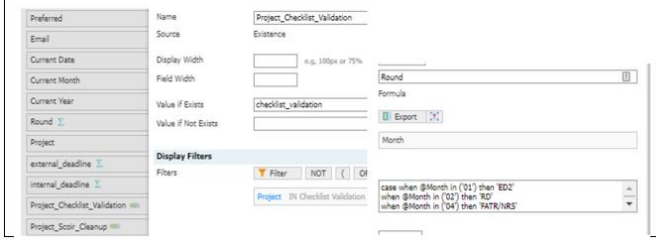
*Email*




*Form*




*Email Export Formula*




*Content Blocks*

