

CARNEGIE

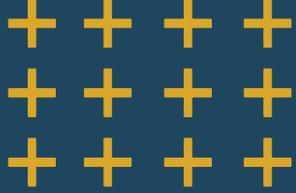
CSU | Cleveland State
University

Revolutionizing Events

Unleashing the Potent Force of Independent Subqueries

JUNE | 2024





Agenda

- ① Introductions
- ② Utilizing Independent Subqueries
- ③ Enhancing Events
- ④ Q+A

PRESENTERS

Clinton Midkiff

- + Assistant Director, Admissions Communications and Operations at Cleveland State University
- + Slate user since 2014
- + Cleveland State University since 2016
- + Carnegie partner since 2020
- + The Innovative and Inquisitive Adventurer



Brett Bieber

- + Slate Communications Strategist, Carnegie
- + Slate user since 2020
- + Carnegie since Nov. 2023
- + The Clever and Confident Producer



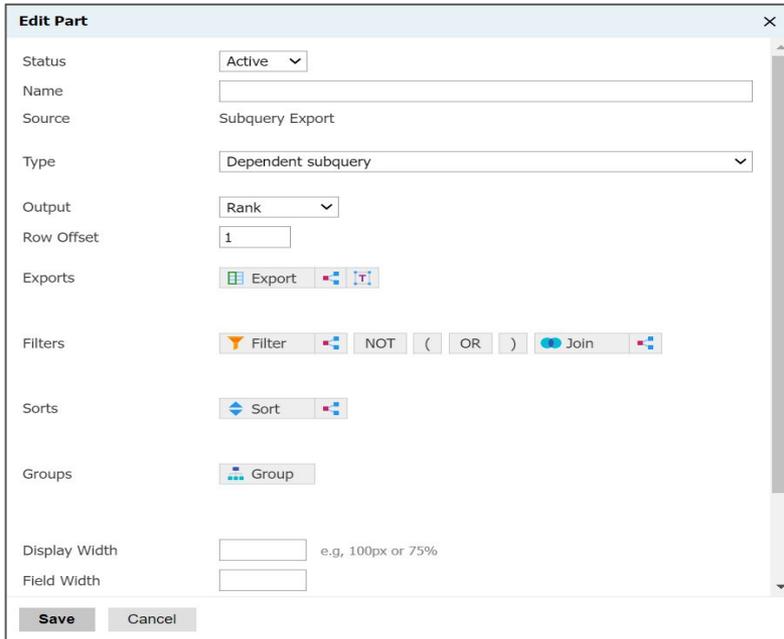
1 Independent Subqueries

SUMMARY

- + How to create
- + Exports
- + Filters
- + Outer Joins

How to Create/What is it?

Independent Subqueries are queries that become available for use that are not related to the original base selected.



Edit Part

Status: Active

Name:

Source: Subquery Export

Type: Dependent subquery

Output: Rank

Row Offset: 1

Exports:   

Filters:   NOT (OR)  

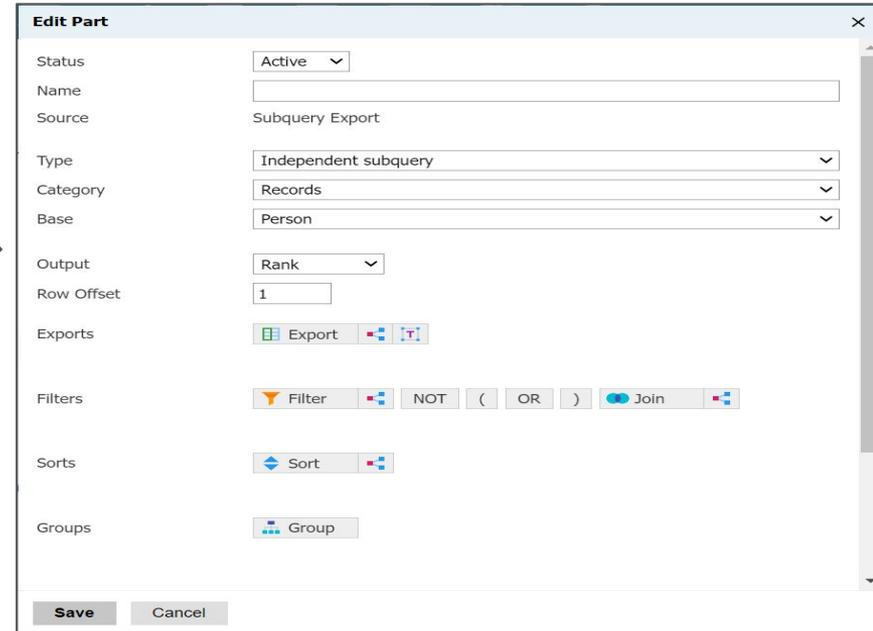
Sorts:  

Groups:  

Display Width: e.g., 100px or 75%

Field Width:

Save **Cancel**



Edit Part

Status: Active

Name:

Source: Subquery Export

Type: Independent subquery

Category: Records

Base: Person

Output: Rank

Row Offset: 1

Exports:   

Filters:   NOT (OR)  

Sorts:  

Groups:  

Save **Cancel**

The Value

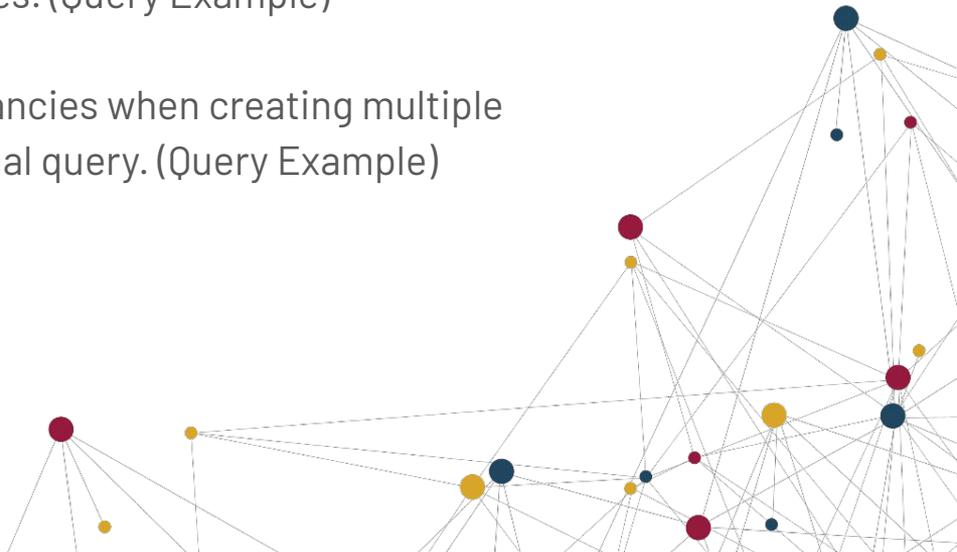
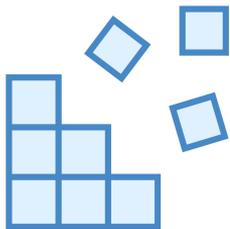
Typically, we can only portray or utilize data that is directly related to the original base chosen (dependent subqueries).

Independent subqueries bypass the requirement of being directly related to the original base. This is exemplified through the examples used in the presentation. However, independent subqueries are not limited to only the examples used today.

The inherent value is full functionality of an upcoming event newsletter, upcoming event queries, variable event invitation information within portals, and more!

Independent Subquery Exports, Filters, and Joins

- + **Independent Subquery Exports** are used to portray data that is not directly correlated to the initial base. (Communication Example)
- + **Independent Subquery Filters** work to filter down and reduce computations when utilizing these two independent subqueries. (Query Example)
- + **Independent Outer Joins** reduce redundancies when creating multiple independent subqueries within one original query. (Query Example)



2 Enhancing Events

Utilizing Independent Subqueries

- + Event Communications
- + Event Queries
- + Event Portals

Enhancement: Event Communications

With Independent subqueries and dictionary outputs, upcoming campus events can be represented in mailings.

These mailings can serve as one-offs, or as a section of a newsletter for students.



How to Create/What is it?

Dictionary Output Functionality - Creates a loop of exports that iterates through itself until no new values exist.

The screenshot shows the 'Edit Part' configuration window for a 'Dictionary Output'. The window is titled 'Edit Part' and has a close button (X) in the top right corner. The configuration is as follows:

- Status:** Active (dropdown)
- Name:** Dictionary Output (text input)
- Source:** Subquery Export
- Type:** Dependent subquery (dropdown)
- Output:** Dictionary (dropdown)
- Row Offset:** 1 (text input)
- Row Limit:** 1 (text input)
- Exports:** Includes an 'Export' button and a URL: `https://FakeURL/CarnegieRocks` (text input)
- Filters:** Includes a 'Filter' button, logical operators (NOT, (, OR,), and a 'Join' button. Below the filters, there are two 'Join' options: `Join Form Responses` and `Join Form Responses / Form`.

Previewing Results

Dictionary Output - Each object is put in a row tag,

1. Each export for the object, each property for the object, is put in a p tag
2. In each p tag:
 - The export's name is put in a k tag,
 - The export's value is put in a v tag,

Row Preview		×
Record	Lookup Record	
Person Name	Bieber, Brett	
Person Email		
Dictionary Output	<pre><row><p><k>Form Title</k><v>Tell us about your training experience.</v> </p><p><k>Form Start Date/Time</k></p><p> <k>https://FakeURL/CarnegieRocks</k><v /></p></row></pre>	

How to Create

Independent Subqueries can be used to pull on forms (events) that are upcoming.

Important Factors:

- + Start Dates
- + Folders
- + Row Limits
- + Sorting

Edit Part

Name: On-campus

Source: Subquery Export

Type: Independent subquery

Category: Related

Base: Form

Output: Dictionary

Row Offset: 1 Row Limit: 3

Exports: Export

Title:

Start:

URL:

Filters: Filter NOT (OR) Join

Form (independent subquery) / Status IN Confirmed/Active

Form (independent subquery) / Folder IN Testing / On Campus

Form Date Vs Current Date

Save Delete Cancel

WYSIWYG View

Two Choices!

You can visit campus either in person or virtually!

Visit campus



Upcoming On-Campus Events

{% for result in On...}

- {{result.Title}} - {{result.start}}

{% endfor %}



Upcoming Off-Campus Events

{% for result in Off-...}

- {{result.Title}} - {{result.start}}

{% endfor %}

Source View

Within the source view, we will assign an object name to our dictionary export to be called upon. From here, we can utilize unique CSS techniques we may want, adding bold, color, bullet points, links, ect to the information.

```
<span style="font-family:Arial,Helvetica,sans-serif;"><b>{% for result in On-Campus %}</b></span>  
<ul>  
  <li>  
    <span style="font-family:Arial,Helvetica,sans-serif;"><b></b><span style="font-size:14px;"><a  
href="{{result.URL}}">{{result.Title}}</a></span> - <span style="font-size:14px;">{{result.start}}</span><b></b></span>  
  </li>  
</ul>  
<span style="font-family:Arial,Helvetica,sans-serif;"><b>{% endfor %}</b></span></td>
```

Final View

Based on the total number of row limits chosen, up to that amount of events will be displayed. It is recommended to split up on-campus, off-campus, and school specific events into different sections. When there are no longer any available events, conditional logic can be built within the source to remove the html encasing that section, and remove empty content without needing to stop the mailing.

Visit campus



**10th ANNUAL
THE
CARNEGIE
CONFERENCE**

- [\(Test\) On-Campus Visit](#) - 04/13/2024 10:00 AM
- [\(Test\) On-Campus Visit](#) - 04/20/2024 10:00 AM
- [\(Test\) On-Campus Visit](#) - 04/27/2024 10:00 AM

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Upcoming Off-Campus Events

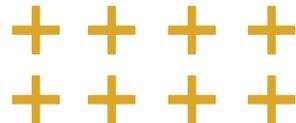
- [\(Test\) Off-Campus](#) - 03/10/2024 04:00 PM
- [\(Test\) Off-Campus](#) - 03/17/2024 04:00 PM
- [\(Test\) Off-Campus](#) - 03/24/2024 04:00 PM

Enhancement: Event Queries

By utilizing independent subquery joins, counselors can view students at upcoming high school/university visits.

Because we are pulling student information as both an export and filter from this independent subquery, we want to start compiling this information from a subquery Join.

We've had the ability to create this in a local HSV (High School Visit) query base before. We are now able to expand to colleges for our transfer events, as well recreate the HSV queries in a new configurable joins query.



Enhancement: Event Queries

Our focus will be on transfer visits, but college fairs, high school visits, and virtual high school visits are all in play.

Sorts

Sort

Joins

Join

College Fair @ School in 14 Days Exactly Rank Row Offset: 1

College Fair @ School in 14 Days Exactly Rank Row Offset: 1

Community College Visit in 14 Days Exactly Rank Row Offset: 1

High School Visit in 14 Days Exactly Rank Row Offset: 1

Virtual High School Visit in 14 Days Exactly Rank Row Offset: 1

Enhancement: Event Queries

Edit Part ✕

Status Active ▾

Name Community College Visit in 14 Days Exactly

Source Subquery Join

Type Independent subquery

Base Form

Filters

Filter
NOT
(
OR
)
Join
⚙️

Join [Form \(independent subquery\) / Location Dataset Record](#)

Join [School by Level of Study, Rank](#) Level of Study = Undergraduate...

Join [School by Level of Study, Rank / Organizations](#)

[Form \(independent subquery\) / Start Date](#) = Today + 14

[Form \(independent subquery\) / Status](#) IN Confirmed/Active

[Form \(independent subquery\) / Template](#) IN Community College (Test)

[Org School is Student's School](#)

Sorts

Sort
⚙️

Save
Delete
Cancel

Breaking this down:

1. Independently Join to Form Base
2. Join from our Form Base to Location Dataset Record
3. Join from our Person base to School by level of study, Rank and then to Organizations.

Enhancement: Event Queries

But wait... what's that at the bottom!?

The screenshot shows the 'Edit Part' dialog box with the following configuration:

- Status: Active
- Name: Community College Visit in 14 Days Exactly
- Source: Subquery Join
- Type: Independent subquery
- Base: Form
- Filters: Filter, NOT, (, OR,), Join, and a settings gear icon.
- Join: Form (independent subquery) / Location Dataset Record
- Join: School by Level of Study, Rank / Level of Study = Undergraduate...
- Join: School by Level of Study, Rank / Organizations
- Form (independent subquery) / Start Date = Today + 14
- Form (independent subquery) / Status IN Confirmed/Active
- Form (independent subquery) / Template IN Community College (Test)
- Org School is Student's School
- Sorts: Sort

Buttons at the bottom: Save, Delete, Cancel

Enhancement: Event Queries

Our connection from our independent Join (Form) to our original base (Person)!

By matching the Organization's GUID (From the person record) to the Location Dataset Record GUID (From the Form), we will only be able to export/filter on those that fit this specific criteria.

Edit Part [X]

Status: Active [v]

Name: Org School is Student's School

Source: Nested Subquery Filter / Community College Visit in 14 Days Exactly

Type: Dependent subquery [v]

Aggregate: Comparison [v]

Field 1: Organizations GUID [v]

Operator: = [v]

Field 2: Location Dataset Record GUID [v]

Exports: [Export] [Filter] [Join]

Organizations GUID

Location Dataset Record GUID

Filters: [Filter] [NOT] [(] [OR] [)] [Join]

[Save] [Delete] [Cancel]

Enhancement: Event Queries

The screenshot shows the 'Edit Part' dialog box with the following configuration:

- Status: Active
- Name: Community College Visit in 14 Days Exactly
- Source: Subquery Join
- Type: Independent subquery
- Base: Form
- Filters:
 - Filter: NOT (OR) Join
 - Join: Form (independent subquery) / Location Dataset Record
 - Join: School by Level of Study, Rank Level of Study = Undergraduate...
 - Join: School by Level of Study, Rank / Organizations
 - Form (independent subquery) / Start Date = Today + 14
 - Form (independent subquery) / Status IN Confirmed/Active
 - Form (independent subquery) / Template IN Community College (Test)
 - Org School is Student's School
- Sorts: Sort

Buttons at the bottom: Save, Delete, Cancel

Compiled together, this outer join allows us to pull on the information of students who currently attend a organization GUID that matches a dataset form GUID.

From here you can configure mailing lists, call campaigns, counselor SMS, or just prepare for upcoming travel.

Enhancement: Event Portals

By utilizing independent subquery joins, dictionary statements, and the coalesce output students can have personalized visit opportunities based on their application status.



Enhancement: Event Portals

Edit Part
✕

Status Active ▾

Name

Source Subquery Export

Type Dependent subquery ▾

Output Coalesce ▾

Row Offset

Exports

Export
⊞

Admitted Events
⊞

Open House Events
⊞

Filters

Filter
⊞
NOT
(
OR
)
Join
⊞

Sorts

Sort
⊞

Groups

Group
⊞

Save
Delete
Cancel

Edit Part
✕

Source Nested Subquery Export / events

Type Independent subquery ▾

Category Related ▾

Base Form ▾

Output Dictionary ▾

Row Offset Row Limit

Exports

Export
⊞

Title
⊞

Start
⊞

URL
⊞

Filters

Filter
⊞
NOT
(
OR
)
Join
⊞
⚙️

Decisions / Code
IN
Admit
⊞

Form (independent subquery) / Folder
IN
On Campus / Admitted Stude...
⊞

Form (independent subquery) / Start Date
>=
today
⊞

Save
Delete
Cancel



Enhancement: Event Portals

Upcoming Events

Discover your future at Cleveland State University! Come experience our dynamic campus firsthand and explore endless opportunities in the heart of Cleveland. Schedule your visit now and ignite your journey!

Fall Visit Day (Test)
Thursday, August 1, 2024

Fall Visit Day (Test)
Sunday, September 1, 2024

Fall Visit Day (Test)
Tuesday, October 1, 2024



Enhancement: Event Portals

Upcoming Events

Discover your future at Cleveland State University! Come experience our dynamic campus firsthand and explore endless opportunities in the heart of Cleveland. Schedule your visit now and ignite your journey!

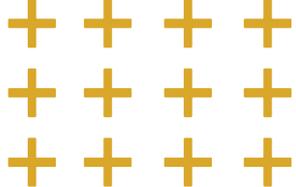
Admitted Student Day (Test)
Saturday, February 1, 2025

Admitted Student Day (Test)
Saturday, March 1, 2025



Enhancement: Event Portals





Resources



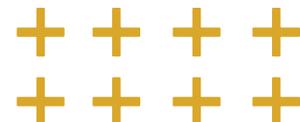
[Independent Subqueries](#)



[Dictionary Output](#)



[Outer Joins](#)





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Thank You!

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