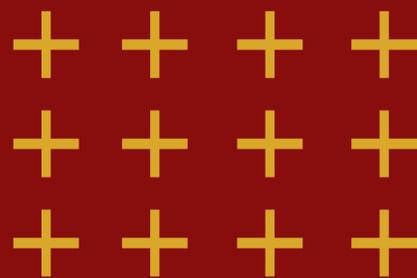


Slate Demo Series

# Concierge

June 2024



# + today's agenda

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1. What is Concierge?
2. The Concierge Interface
3. Building a Concierge Portal
4. Concierge Use Cases

# What is Concierge?

Concierge is a new user interface where an embedded portal is used as a primary screen for fast record lookups. Concierge allows for quick, curated lookups for individual Slate records.

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You are accessing a CLEAN SLATE ENVIRONMENT of Slate that is for training purposes only.

Concierge

Dailey, Steve

**Dailey, Steve**      Advisor: King Drabble

Class Standing: Freshman      Advisor: King Drabble  
 Current GPA:      Email: [sdailey+staff@technolutions.com](mailto:sdailey+staff@technolutions.com)  
 Address: 157 Church St Fl 22      Phone: +1 203-555-5555  
 New Haven, CT  
 06510-2100  
 United States

[Add Advising Note](#)   [Add Early Alert](#)   [Upload Worksheet](#)   [Email Success Team](#)  
[Access DegreeWorks](#)

Current Classes

Course Name	Midterm Grade	Final Grade	Semester	Credits	Faculty
First Year Experience	A	F	Fall 2023	1	Ken Higgins
General Biology I	A	B	Spring 2022	4	
Art	C	A	Fall 2022	3	
General Chemistry	C	B	Spring 2022	4	

Materials

Material	Date Received	Display Material
Advising Worksheet	05/03/2024	<a href="#">View Material</a>
Personal Statement	05/03/2024	<a href="#">View Material</a>

Advising Notes

Term	Referred By	Reason	Time Spent	Notes	Submitted By
Fall 2023		Informal Meeting	30 min	Met with Steve about registering for classes	Allison Beebie

Early Alerts

Comment	Internal Comment	Submitter	Created Date
Test for concierge - Steve please turn in your homework!	Internal comments test	Allison Beebie	05/03/2024

Kudos

Category	Comment	Submitter	Created Date
Academic Excellence	Yay	Courtney Mumma	04/19/2024

Referrals

Comment	Referral Office	Submitter	Created Date
Referral comments for Steve's Chemistry class.	Tutoring, Writing Center	Allison Beebie	05/03/2024

Scheduled Advising Events/Appointments

Status	Date	Title	Staff
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Materials

Status	Date	Title	Staff
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Timeline Items (past year)

- Communications
- Interactions

# Concierge

- Easy to Use
- Quick Lookup
- Interactive
- Curated Depending on the User
- Person, Application or Dataset Records

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# Concierge Interface

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# Finding Concierge

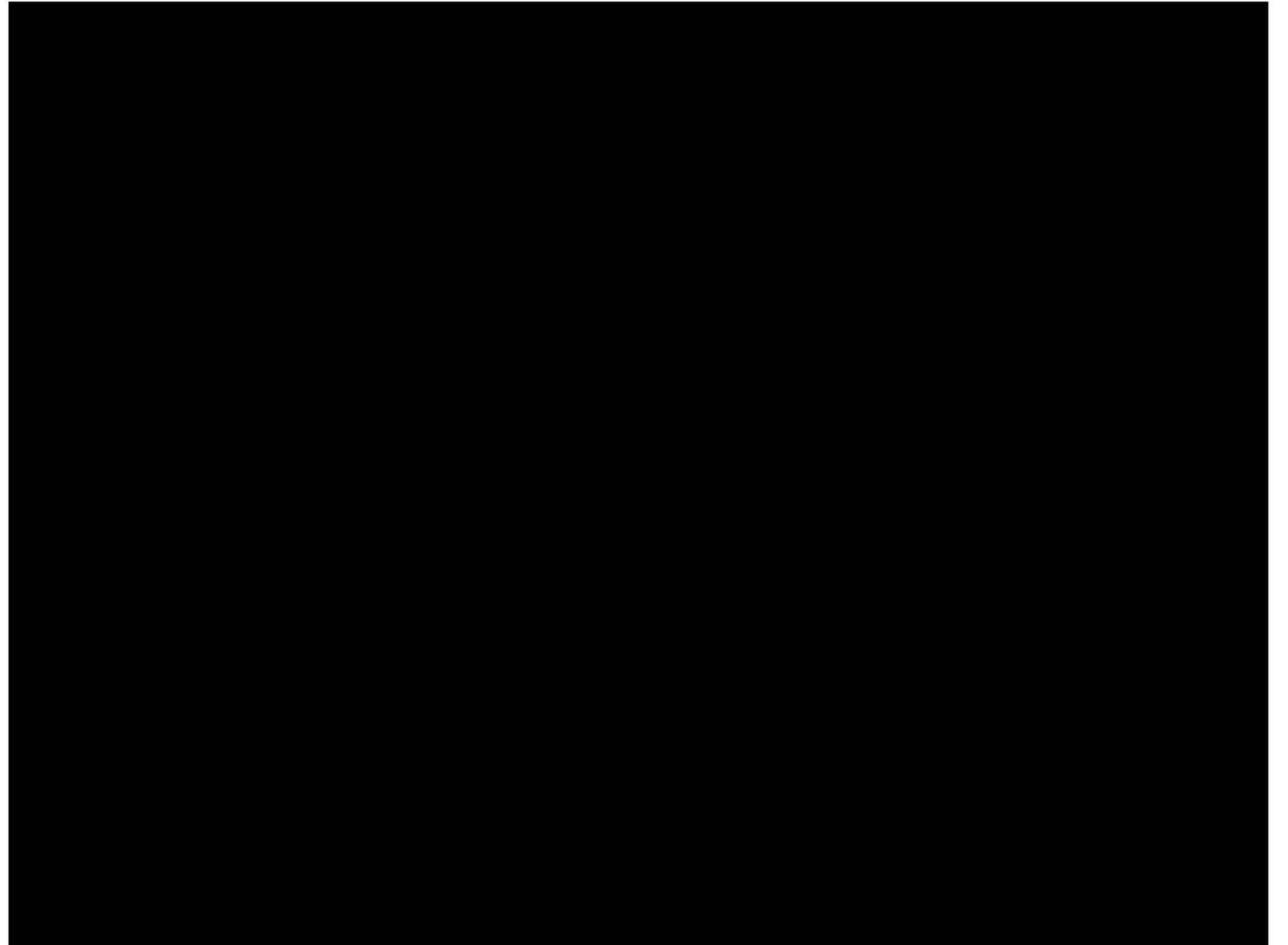
- Database Search
- Select Desired Concierge
- Click "Preview"

The screenshot shows the 'slate' application interface. At the top, there is a dark blue header with the 'slate' logo on the left and a search bar on the right containing the text 'Search...'. Below the header is a navigation bar with several icons. The main content area is titled 'Database' and features a search bar with the text 'Search Database...'. Below this is a 'Pinned' section with a message: 'To pin a feature or tool, access the feature or tool and then pin the item in your recent item list under the Database menu.' The main content is organized into a grid of categories, each with a list of items:

- Applications**
  - Application Editor
  - Application Logic
  - Application Periods
  - Application Rounds
- Auditing**
  - Access Logs
  - Cleanup / Scrub Address Records
  - Database Activity Monitor
  - Deletion Log
  - Error Logs
  - Field Search
  - GUID Search
  - Job Activity Monitor
  - Resource Auditor
  - Retention Policies
  - System Dashboard
  - Test & Other Environments
  - Unused Resources
  - Retention Policies (deprecated)
- Automations**
  - Origin Groups
  - Origin Sources
  - Populations
  - Rules
  - Translation Codes
- Branding**
  - Branding Editor
  - Ping
- Communications**
  - Bots
  - Communications History
  - Compliance Dashboard
  - Deliver Configuration
- Configurations**
  - Configuration Keys
  - Content Blocks
  - Files
  - Research Configurations
- Import and Data Processing**
  - Batch Acquire
  - Consolidate Records
  - Force Process Import
  - Force Process Pickup
- Payments**
  - Payment History
  - Payment Terminal
  - PayPal/Venmo
  - Person-Scoped Payment Configuration

# Concierge Interface

- Omni Search
- Display Static & Merged Data
- Interactive Content



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# Building a Concierge Portal

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# Building a Concierge Portal

- Traditional or Express Portal
- Define the information you want to display using query exports
- Use portal elements to display desired content

All Express Portals

Courses Concierge Demo Edit ▼

Key	courses
URL	<a href="https://usr-model.test.technolutions.net/portal/courses">https://usr-model.test.technolutions.net/portal/courses</a>
Status	Active
Folder	Concierge
Scope	Custom Courses
Security Type	Custom Courses
SSO Flag	Inactive

Views

Home (Default)

View

Header

Messenger

Impersonate

Embed Portal

Edit Permissions

Edit Template

# Building a Concierge Portal Cont'd

You are accessing a **CLEAN SLATE ENVIRONMENT** of Slate that is for training purposes only.

Express Portals

[New Express Portal](#)

Name	Folder	Security Type	Key	Status
Open House		Anonymous	open_house	Active
Advising Concierge Demo (AB/BB)	Concierge	User	advising_concierge_demo	Active
Advising Concierge Portal	Concierge	User	advising_concierge	Active
Courses Concierge Demo	Concierge	User	courses	Active
One Stop for Student Center Staff	One Stop	Person	one_stop	Active
New Student Orientation Portal	Orientation	Person	orientation_portal	Active

Slate (Slate Success Showcase) hora1 / roma / usr-model-test

Portals  
**Express Portals**  
[Portal Components](#)  
[Concierge](#)  
**All Folders**  
[Concierge](#)  
[One Stop](#)  
[Orientation](#)

- Can build a Concierge within a Conventional or Express portal.
- Click "New Express Portal"
- Name the portal and give it a computer friendly Key
- Choose the portal scope (which type of record to look up)
- All Concierge portals must have User security to be accessible in the Concierge interface

# Building a Concierge Portal Cont'd

- Click into the view
- Add exports and update the export names to be computer friendly

The screenshot shows the Slate web interface for configuring a Concierge Test. The top navigation bar includes the 'slate' logo, a search bar, and a user profile for 'Nina Takacs'. A pink banner below the navigation bar states: 'You are accessing a CLEAN SLATE ENVIRONMENT of Slate that is for training purposes only.'

The main content area is titled 'Concierge Test' and includes an 'Edit' dropdown menu. Below the title is a table of configuration details:

Key	con_test
URL	<a href="https://usr-model.test.technolutions.net/portal/con_test">https://usr-model.test.technolutions.net/portal/con_test</a>
Status	Inactive
Folder	Concierge
Scope	Person
Security Type	User

To the right of the table are three buttons: 'Embed Portal', 'Edit Permissions', and 'Edit Template'. Below the table is a 'Views' section with a horizontal list of view options. The 'Home (Default)' view is selected and highlighted with a mouse cursor. To the right of the views list are three buttons: 'View', 'Header', and 'Messenger'. At the bottom left, the text 'Slate (Slate Success Showcase)' is visible, and at the bottom right, the breadcrumb 'hora1 / roma / usr-model-test' is shown.

# Building a Concierge Portal Cont'd

- Drag in portal elements
- Static Content Blocks
- Add in Merge Fields with available exports

The screenshot shows the Slate Concierge Portal editor interface. At the top, there is a blue header with the 'slate' logo and a navigation bar containing icons for various portal elements. A search bar is located in the top right corner, with the user name 'Nina Takacs' next to it. Below the header, a pink banner displays the message: 'You are accessing a **CLEAN SLATE ENVIRONMENT** of Slate that is for training purposes only.'

The main content area is titled 'Home' and includes a table with the following details:

Status	Active
Layout	One Column
URL	/portal/con_test (default view)

On the right side of the editor, there is an 'Edit' button and a vertical stack of buttons: 'View as List', 'Collapse All', and 'Edit Exports'. Below these buttons is a grid of drag-and-drop options: 'Static Content', 'Events', 'Form', 'Component', and 'Slate Video'.

The main content area contains a merge field: `{% for view in views %}`  

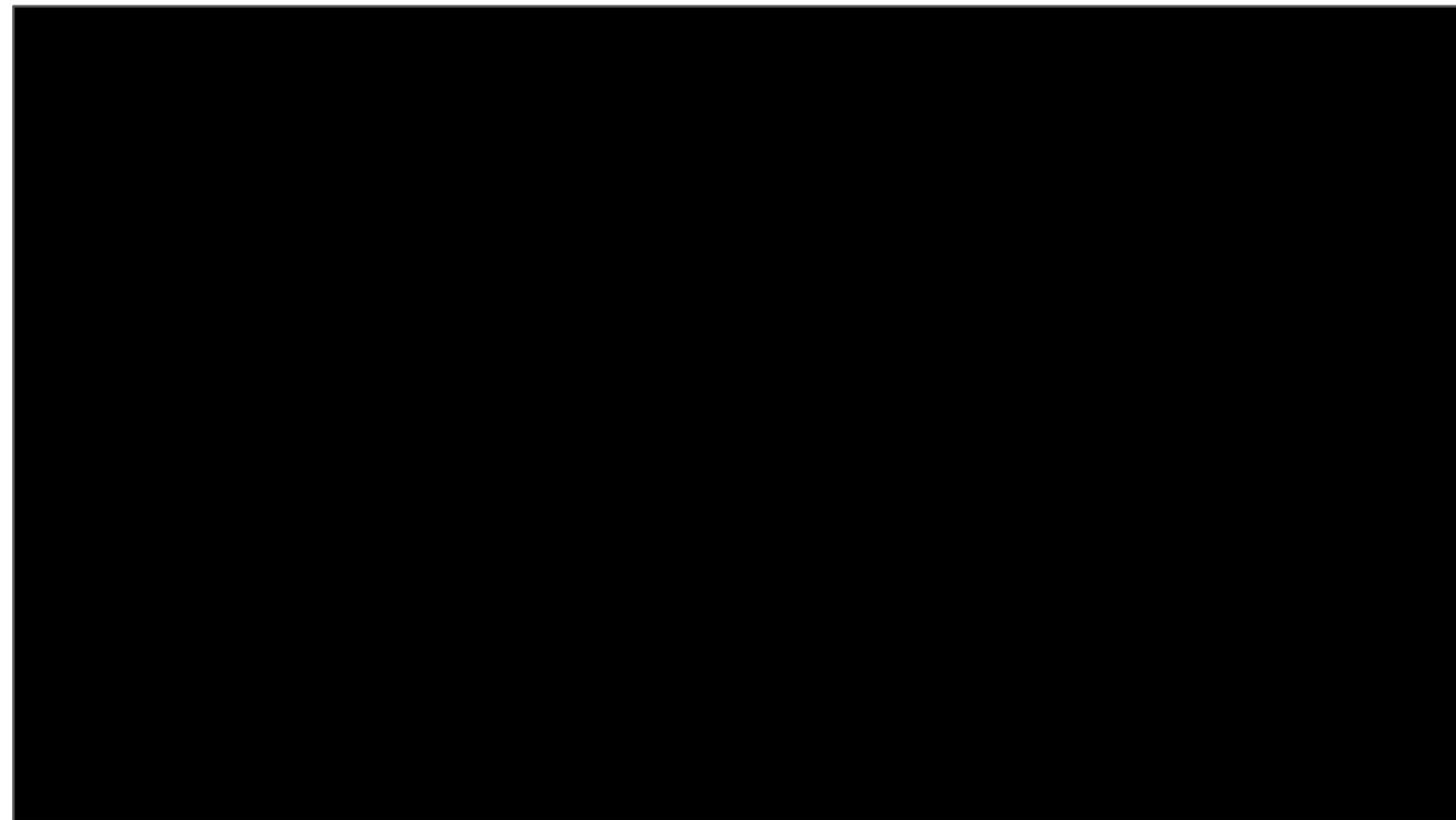
- `>{{view.name}}`

`{% endfor %}`

At the bottom left, the text 'Slate (Slate Success Showcase)' is visible. At the bottom right, the text 'hora1 / roma / usr-model-test' is displayed.

# Building a Concierge Portal Cont'd

- Activate the portal
- Navigate to Concierge
- Click "New Concierge"
- Activate, name, and select the appropriate User portal



You are accessing a **CLEAN SLATE ENVIRONMENT** of Slate that is for training purposes only.

### Concierge

[New Concierge](#)

Name	Status
Academic Advising	1
Advising Concierge Demo (AB/BB)	1
Courses Concierge Demo (NRT)	0
One-Stop	1
test	0

[Portals](#)  
[Express Portals](#)  
[Portal Components](#)  
**Concierge**

Slate (Slate Success Showcase) hora1 / roma / usr-model-test

# Building a Concierge Portal Cont'd

You are accessing a **CLEAN SLATE ENVIRONMENT** of Slate that is for training purposes only.

## Concierge

[New Concierge](#)

Name	Status
Academic Advising	1
Advising Concierge Demo (AB/BB)	1
Concierge Test	1
Courses Concierge Demo (NRT)	0
One-Stop	1
test	0

[Portals](#)  
[Express Portals](#)  
[Portal Components](#)  
**Concierge**

Slate (Slate Success Showcase) hora1 / roma / usr-model-test

- Click "Preview"
- Type in the record name or reference number
- Hit enter

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# Concierge Use Cases

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# Concierge Use Cases

## ○ **Admissions**

- Territory Management/Telerecruiting
- Event Management
- Front Desk/Walk-In Management

## ○ **Student Success**

- Academic Advising
- International Student Management

## ○ **Advancement**

- Donor Profile/History

## ○ **Datasets**

- Faculty Dataset
- Custom Courses Dataset



# Thank You!



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**Slate Admissions Implementation Strategist**

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