

Slate – Lookup Records

Option 1: Lookup Bar

On the Slate Dashboard, use the Lookup Bar in the upper right corner to search for individual records. Start typing and all similar names will begin generating in the drop-down menu.



Option 2: Records tab

Click the Records tab at the top.



* By simply hovering over the Records tab, you can see your most recent searches. You can pin and unpin them to your menu by selecting the “pin” image that appears to the right of their name when you hover over it.

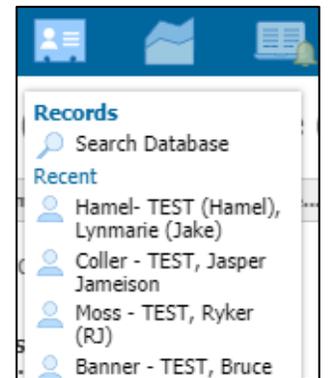


Note: These are records you have searched for, not necessarily applicants you have viewed. Applicants you have viewed in Reader will show up as recently viewed under the Reader icon.

Search criteria for record lookup include:

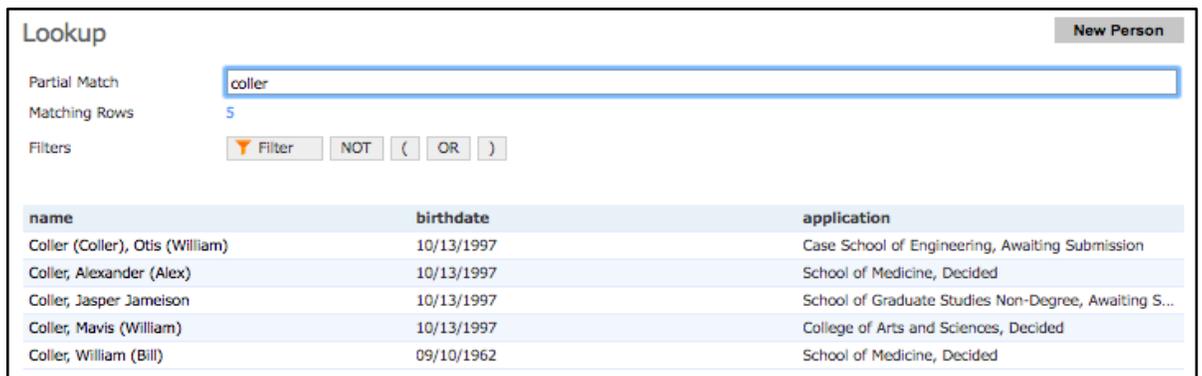
- Name (last or first) – Slate needs at least 2 characters of the name to do a search
- Phone number
- Email address
- Slate ID

Note: You cannot search by birthdate in this box, but you can use the Filters (see below). You will only be able to view applications that are specific to your population – not all records.



Search by Name

Searching by name will bring up everyone with that exact name or a partial match.



Search by Phone or Email

Searching by phone number pulls up any record with the associated phone number. Searching using an email address pulls up a single record associated with the address.

Search by Filter

Use this method to search for an individual record using a single identifiable factor, like birthdate. To search by identifiable factors like birthdate, click Filter. Then ensure the Slate Template Library checkbox is checked, search “birthdate,” click Birthdate, and click Continue at the bottom. Set the birthdate equal to (=), enter the date, and click Save. This will bring up any applicants with that exact birthdate.

If you need assistance, contact the School of Graduate Studies.

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