Slate Training for Advisors

Link: slate.okstate.edu

Access Student Records

Click on the Rolodex style icon for records

From the results menu, choose:

- “Search Database” to search for a specific record
- Records that you access often can be “Pinned” for ease of access
- “Recent” are records you accessed recently
- Click the desired record to open the Student Record

Student Record

TAB: Dashboard (Home Page)

Student Overview

Student Success CRM (bdw) osustudentsuccess@okstate.edu Updated 11.18.2021
TAB: Timeline
Chronological listing of interactions
*Includes “Form Submitted: Advising Notes”

TAB: Profile
Basic biographic information

TAB: Materials
List of uploaded materials
*Select item to view or edit
TAB: Details

Extensive List of Student Data Points
Banner information, Student details, Advisor information, Academics, Attributes, Holds, Proxy

*Many items only populate if present for the student*

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**Academics**
- Current Academic College: College of Arts and Sciences
- Test Major: EN BDY CIVE
- Program: ENSMINT
- Concentration: Computer Science
- Last Term Attended: 2021FA
- Cumulative GPA: 3.6
- Currently Enrolled Credit Hours: 16
- Total Credit Hours: 45
- Cumulative GPA: 3.6
- Graduation Application: No
- Graduation Application Date: N/A

**Attributes**
- First Generation: Yes
- Kinship Attribute: No
- Athletic Attribute: Yes
- Student Attribute: UAC
- Student Attribute: UAKS

**Holds**
- Holds

**Proxy Information**
- Proxy Access Information: Yes
- Registration Status: Full Grades
- Academic Transcript: N/A
- Email Address: jhayes23@emailune.com
- Proxy Name: Betty Weaver
- Proxy Relationship: Parent of Legal Guardian
- Proxy Start Date: 08/17/2020
- Proxy End Date: 08/16/2023
- Proxy Name: N/A
- Proxy Relationship: N/A
- Proxy Start Date: N/A
- Proxy End Date: N/A

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**TAB: Advising**

Lists Recent Advising Appointments

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Updated 11.18.2021
### TAB: Class Schedule

Shows Current term class schedule

<table>
<thead>
<tr>
<th>CRN</th>
<th>Course</th>
<th>Status</th>
<th>Midterm Grade</th>
<th>Final Grade</th>
<th>Instructor</th>
<th>Instructor 2</th>
<th>Active?</th>
<th>Updated Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>99992</td>
<td>CAS TEST - Fall 2021</td>
<td></td>
<td></td>
<td></td>
<td>David Marott</td>
<td>David Marott</td>
<td>No</td>
<td>08/18/2021</td>
</tr>
<tr>
<td>99997</td>
<td>IRA TEST - 001 - Fall 2021</td>
<td>A</td>
<td>A</td>
<td></td>
<td>Christie Havlina</td>
<td>Larry Burns</td>
<td>No</td>
<td>07/20/2021</td>
</tr>
<tr>
<td>68841</td>
<td>MATH 14343 - 2021</td>
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<td></td>
<td></td>
<td>David Marott</td>
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<td>09/30/2021</td>
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<tr>
<td>99990</td>
<td>MATH 1223 - 001 - Fall 2021</td>
<td>B</td>
<td>A</td>
<td></td>
<td>David Marott</td>
<td>Yes</td>
<td></td>
<td>08/17/2021</td>
</tr>
</tbody>
</table>