

MAY 1, 2025

YOUR DAY, YOUR WAY: BUILDING ROLE-SPECIFIC, INTUITIVE HOMEPAGE DASHBOARDS

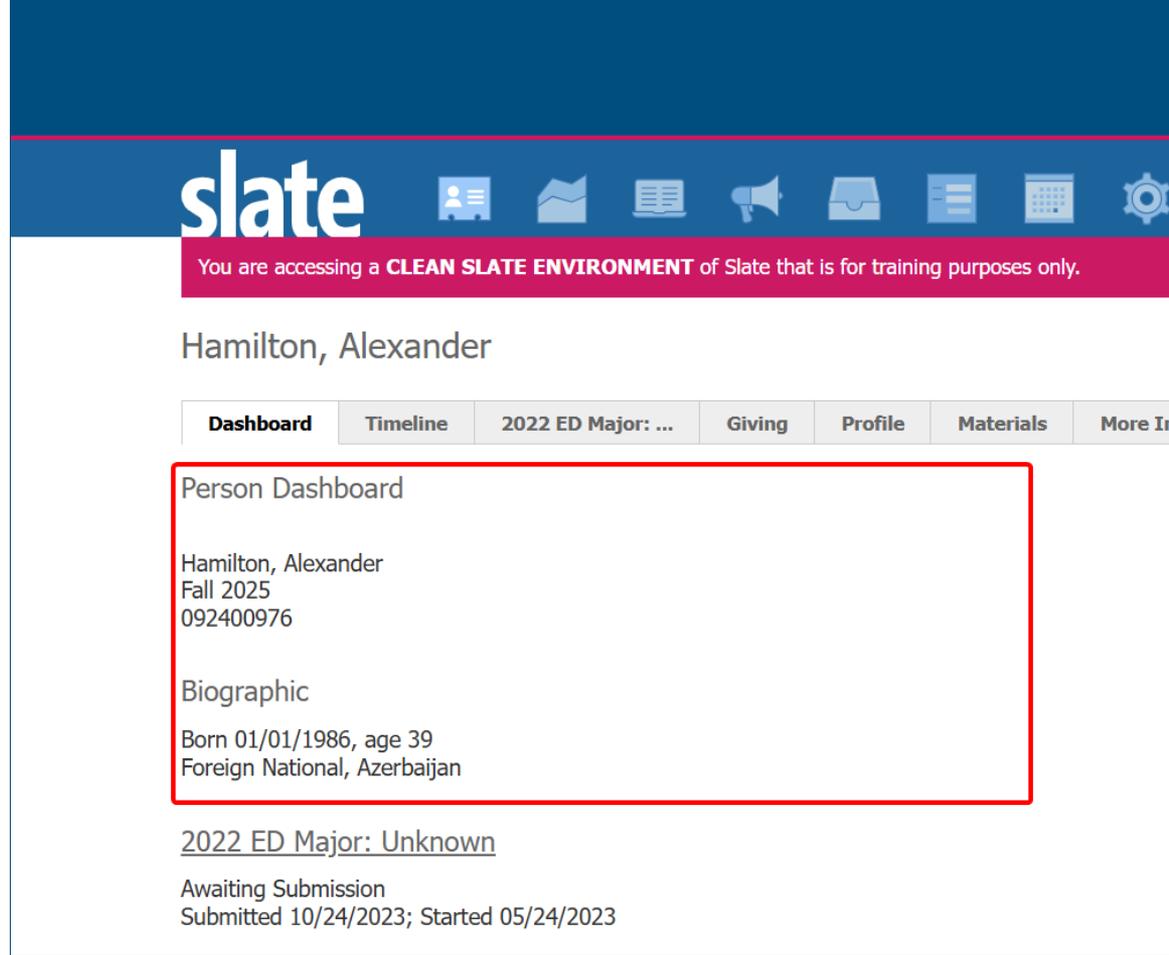
WHY DASHBOARDS?

BETTER QUESTION

WHAT KIND OF DASHBOARD?

“Dashboard” can mean

- First tab on a person record (all the default information)



slate [Icons: Person, Document, Mail, Document, Megaphone, Folder, Document, Calendar, Gear]

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

Hamilton, Alexander

Dashboard | Timeline | 2022 ED Major: ... | Giving | Profile | Materials | More I...

Person Dashboard

Hamilton, Alexander
Fall 2025
092400976

Biographic

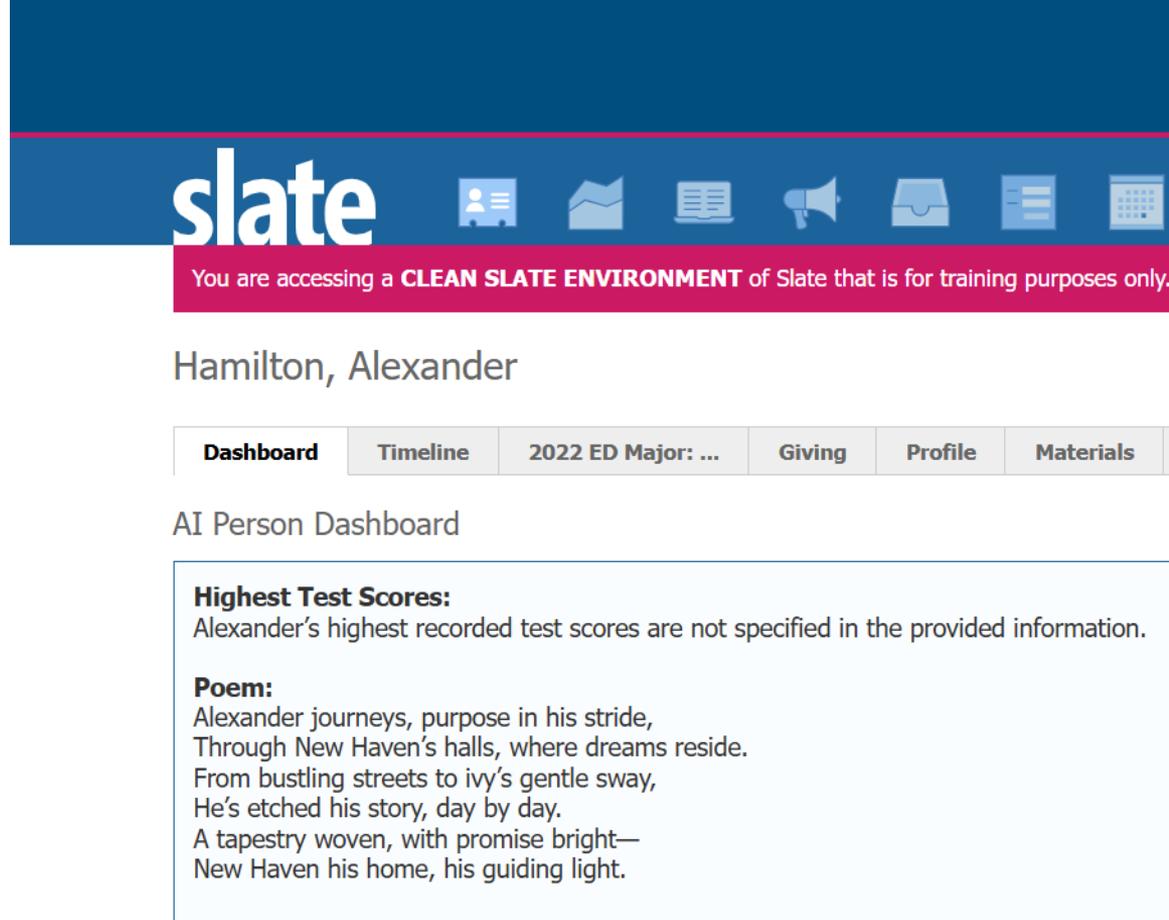
Born 01/01/1986, age 39
Foreign National, Azerbaijan

2022 ED Major: Unknown

Awaiting Submission
Submitted 10/24/2023; Started 05/24/2023

“Dashboard” can mean

- First tab on a person record (all the default information)
- Custom content on a record (think Application Dashboard or AI Dashboards)



The screenshot shows the Slate system interface. At the top, the word "slate" is displayed in a large, white, sans-serif font. To its right are several blue icons representing different system functions: a person icon, an envelope, a document, a megaphone, a folder, a list, and a calendar. Below the "slate" logo, a pink banner contains the text: "You are accessing a **CLEAN SLATE ENVIRONMENT** of Slate that is for training purposes only."

The main content area displays the name "Hamilton, Alexander" in a large, dark font. Below the name is a horizontal navigation bar with several tabs: "Dashboard" (highlighted in dark blue), "Timeline", "2022 ED Major: ...", "Giving", "Profile", and "Materials".

Below the navigation bar, the section "AI Person Dashboard" is visible. It contains two sections:

- Highest Test Scores:** Alexander's highest recorded test scores are not specified in the provided information.
- Poem:** Alexander journeys, purpose in his stride,
Through New Haven's halls, where dreams reside.
From bustling streets to ivy's gentle sway,
He's etched his story, day by day.
A tapestry woven, with promise bright—
New Haven his home, his guiding light.

“Dashboard” can mean

- First tab on a person record (all the default information)
- Custom content on a record (think Application Dashboard)
- Central home for overview metrics (think System Dashboard, or really any report)



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

[All Reports](#)

Report Funnel

Folder: Funnel Reports
Current as of: 04/18/2025 at 03:14:28 PM ET
Status: Completed successfully.

2025 Year to Date

Metric	Applications	Completed Apps	Completion Rate	Admits	Admit Rate	Enrolled
By Round						
ED	141	114	80.9%	39	27.7%	3
GRAD	3		%		%	
RD	137	89	65%	37	27%	4
By Sex						
F	142	101	71.1%	37	26.1%	3
M	133	102	76.7%	39	29.3%	4

“Dashboard” can mean

- First tab on a person record (all the default information)
- Custom content on a record (think Application Dashboard)
- Central home for overview metrics (think System Dashboard, or really any report)
- Collection of specific to-dos and progress (think tasks panel)

The screenshot shows a user dashboard with a dark blue header containing a search bar and a user profile icon. Below the header is a pink navigation bar. The main content area is divided into sections: a left sidebar with a search bar and a 'Community Forum' link, a central area with a map of stars and a 'Community Forum' link, and a right sidebar with a 'Create Task...' dropdown, 'Your Tasks (2)' and 'Related Tasks (0)' buttons, and a list of tasks: 'Feed the cat' (Not Started, Due 05/01/2025) and 'Finish Dive Deeper Slides' (In Progress, Due 05/01/2025). A red box highlights the tasks panel on the right. A checkmark icon in a square is also highlighted in a red box on the far right sidebar.

CAN WE DO IT ALL?



Can we do it all?

- Display default information to all users
- Include user-specific information
- Make some overview metrics available
- Provide easy access to to-dos and action steps
- Offer some delight



(spoiler alert)

YES, WE CAN!

Live demo of dashboard here

How do we get there?

1. Create a homepage report
2. Create a user-scoped portal
3. Embed the portal in your homepage report
4. Spruce up the portal to accomplish our goals



Homepage Report

1. Create a new report. Save it in the System / Homepage folder.

<https://knowledge.technolutions.net/docs/homepage-reports>

2. Add a single Data/Charts report part. Select System / System as Category and Base.

3. Add a Static Content block. You will embed your portal here, later.

The screenshot displays the Slate reporting tool interface. At the top, the 'slate' logo is visible on the left, and a search bar is on the right. Below the logo, a notification states: 'You are accessing a CLEAN SLATE ENVIRONMENT of Slate that is for training purposes only.' The main navigation bar includes icons for various functions. The left sidebar shows a breadcrumb trail: 'All Reports > Dive Deeper'. The main content area is titled 'Dive Deeper' and shows a 'Folder' section with 'Dive Deeper' selected. Below this, there are sections for 'Parts' and 'Data Rows'. The 'Parts' section is currently empty, and the 'Data Rows' section shows 'New Part' and 'Data Rows'. A modal dialog box titled 'Edit Part' is open in the center, showing the following fields:

Status	Active
Name	Homepage Portal
Type	Configurable Joins
Category	System
Base	System

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons. The background interface shows a 'Data/Charts' section with options for 'Data Explorer' and 'Query'.

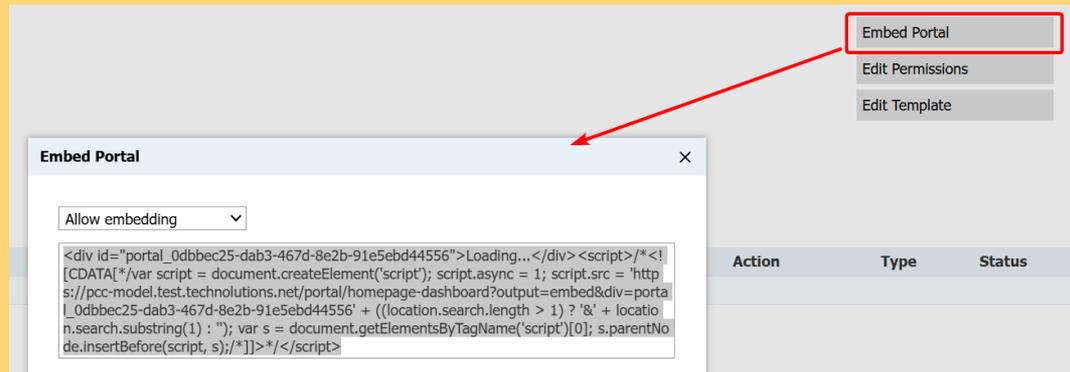
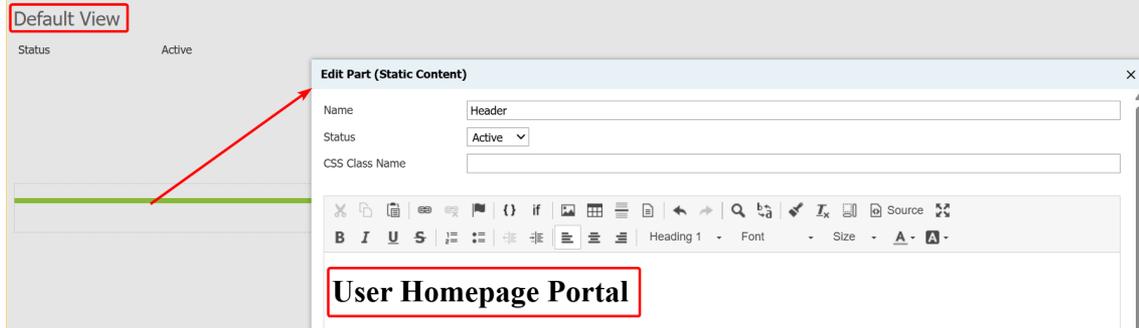
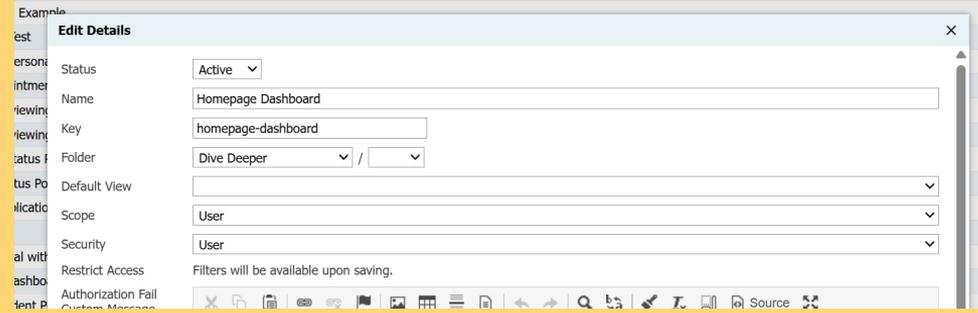
User Portal

1. Create a new portal. Set Scope and Security to User.

<https://knowledge.technolutions.net/docs/creating-a-custom-portal>

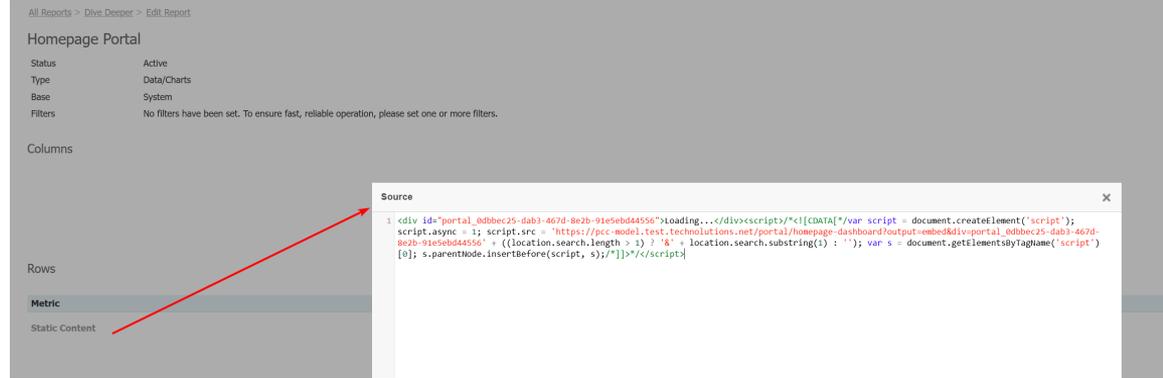
2. Configure a Default View. Add some text to this block so you can test that it is working on the homepage.

3. Enable Embed Portal functionality and copy the embed script. (Remember to click Save)



Back to Homepage Report

1. Open the Homepage Report and get to the Static Content block we created earlier.
2. Click Source Code.
3. Paste the Embed Script and Save.
4. The text from your portal should be visible in the report, then also on the Slate homepage.



All Reports > Dive Deeper > Edit Report

Homepage Portal

Status: Active
Type: Data/Charts
Base: System
Filters: No filters have been set. To ensure fast, reliable operation, please set one or more filters.

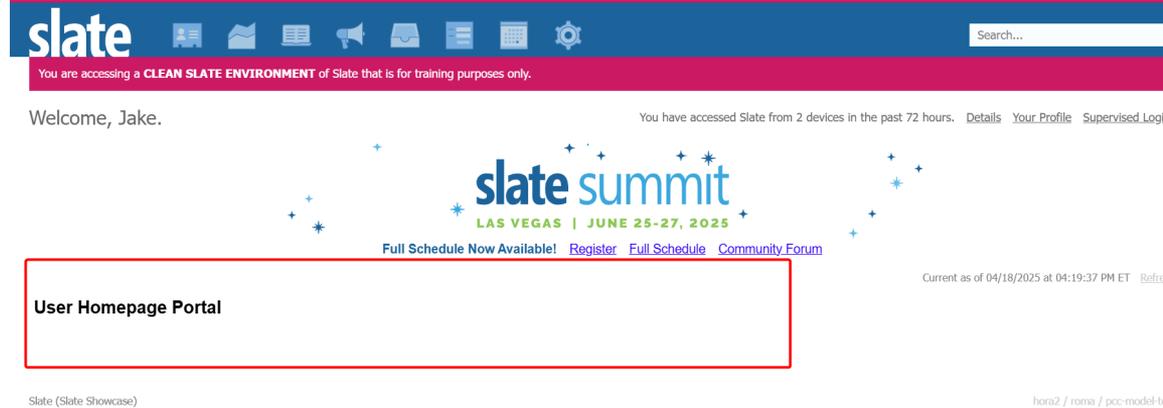
Columns:

Rows:

Metric

Static Content

```
Source
1 <div id="portal_0dbbec25-dab3-467d-8e2b-91e5ebd44556">loading...</div><script>*<![CDATA[*var script = document.createElement('script');
script.async = 1; script.src = 'https://pcc-model-test.technologies.net/portal/homepage-dashboard/output-embed&div=portal_0dbbec25-dab3-467d-8e2b-91e5ebd44556' + ((location.search.length > 1) ? '&' + location.search.substring(1) : ''); var s = document.getElementsByTagName('script')[0]; s.parentNode.insertBefore(script, s);/*</script>
```



slate

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

Welcome, Jake.

You have accessed Slate from 2 devices in the past 72 hours. [Details](#) [Your Profile](#) [Supervised Logging](#)

slate summit
LAS VEGAS | JUNE 25-27, 2025

[Full Schedule Now Available!](#) [Register](#) [Full Schedule](#) [Community Forum](#)

Current as of 04/18/2025 at 04:19:37 PM ET [Refresh](#)

User Homepage Portal

Slate (Slate Showcase)

hora2 / roma / pcc-model-test

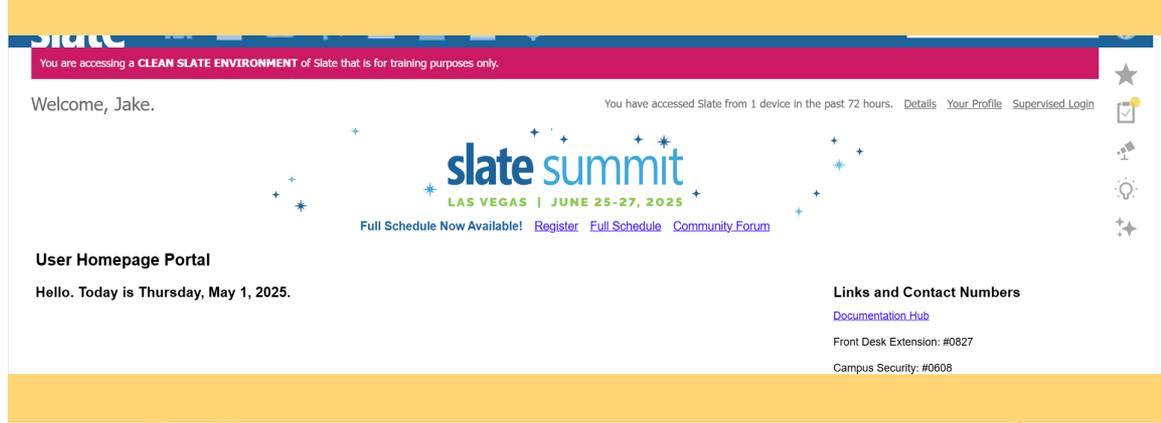
GOAL #1 – Display default information to all users

Let's start with:

1. Today's date
2. Some important upcoming dates
3. A link to our internal documentation resource

Default information for all users

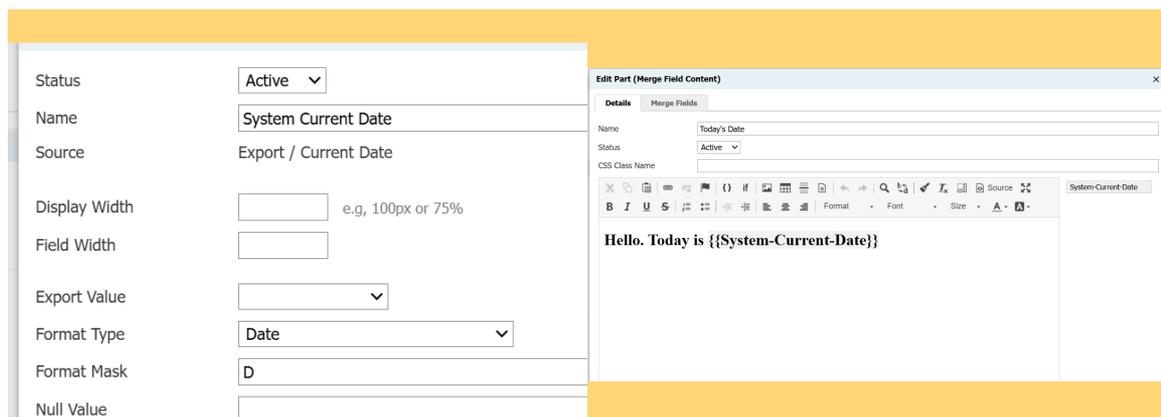
1. In the default view for your portal, let's add some a new static content block.
2. For something like a static link, or a list of upcoming important dates, a normal static content block is fine.
3. For something like today's date (which we can use a query to return), use a Merge Field Content block.
4. On the Merge Fields tab, add System Current Date. Format the date however you'd like, then merge it into your text.



The screenshot shows the Slate Summit user homepage. At the top, a pink banner reads "You are accessing a CLEAN SLATE ENVIRONMENT of Slate that is for training purposes only." Below this, the user is greeted with "Welcome, Jake." and a notification: "You have accessed Slate from 1 device in the past 72 hours." The main header features the "slate summit" logo with "LAS VEGAS | JUNE 25-27, 2025" and links for "Full Schedule Now Available!", "Register", "Full Schedule", and "Community Forum". The page is divided into two main sections: "User Homepage Portal" and "Links and Contact Numbers". The "User Homepage Portal" section displays "Hello. Today is Thursday, May 1, 2025." The "Links and Contact Numbers" section includes a "Documentation Hub" link, "Front Desk Extension: #0827", and "Campus Security: #0608".



This screenshot shows the Slate user interface with a red arrow pointing to the "Today's Date" field in the "User Homepage Portal" section. The field contains the text "Hello. Today is {{System-Current-Date}}". The "Links and Contact Numbers" section is also visible, containing a "Documentation Hub" link and contact information: "Front Desk Extension: #0827", "Campus Security: #0608", and "IT Help Desk: #1111".



The screenshot shows the "Edit Part (Merge Field Content)" dialog box in Slate. The "Details" tab is active, showing the "Merge Fields" section. The "Name" field is set to "Today's Date", the "Status" is "Active", and the "CSS Class Name" is empty. The "Export Value" field is set to "System Current Date". The "Format Type" is set to "Date" and the "Format Mask" is set to "D". The "Null Value" field is empty. The "Display Width" field is set to "e.g., 100px or 75%". The "Field Width" field is empty. The "Export Value" field is set to "System Current Date". The "Format Type" is set to "Date" and the "Format Mask" is set to "D". The "Null Value" field is empty. The "Display Width" field is set to "e.g., 100px or 75%". The "Field Width" field is empty. The "Export Value" field is set to "System Current Date". The "Format Type" is set to "Date" and the "Format Mask" is set to "D". The "Null Value" field is empty.

GOAL #2 – Include user specific information

Now let's add in:

1. The user's name
2. An extra block if they are an administrator
3. A list that is specific to them

User specific information #1

Add in the user's name

1. Inside your Merge Field Content block, now adding in User Preferred Name.
2. This is available immediately because the portal is user-scoped.
3. Note – what if a user does not have Preferred Name set? Consider using a subquery export with the Coalesce type to set fallback options for First Name.

Select All	Full Name	First	Last
Account Type	Active Status	Created Date	Department
Email	Expiration Date	Export Value	Export Value 2
Export Value 3	Export Value 4	Export Value 5	GUID
Home Country	Inbox SMS Sender	MFA	Mobile Number
Notes	Phone Number	Preferred	Short Name (deprecated)
Supervised Account	Title	Updated Date	Username

System

Select All	Current Date	Current Query ID	Current Query Run Created
Current Query Run ID	Current Query Run Timestamp ...	Current Query Run Timestamp ...	Database Friendly Name
Database HTTPS	Database Name	Random ID	Row Number

Name: Today's Date

Status: Active

CSS Class Name:

System-Current-Date

User-Preferred

Hello {{User-Preferred}}. Today is {{System-Current-Date}}

User specific information #2

Conditionally Displaying a Block

1. Add a new block to your portal view.
2. Scroll down to Filters and add a subquery filter.
3. Use an Exists filter to limit the display of this block to users who have the Administrator (All Access) role.

The screenshot shows the 'Edit Part (Static Content)' interface. At the top, there are fields for 'Name' (Administrator Only Block), 'Status' (Active), and 'CSS Class Name'. Below these is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, image, table, and text color. The main content area contains the text: **You are a Slate Administrator. With great power comes great responsibility.**

Below the editor is a 'Filters' section. It shows 'Matching Rows' as 52. The filter configuration includes a 'Filter' button, a 'NOT' operator, and a 'Join' button. A subquery filter is added: 'Has Administrator Role'.

At the bottom of the filter section are 'Save' and 'Cancel' buttons.

User specific information #2

Conditionally Displaying a Block

1. Add a new block to your portal view.
2. Scroll down to Filters and add a subquery filter.
3. Use an Exists filter to limit the display of this block to users who have the Administrator (All Access) role.

Edit Part ✕

Status	Active ▼
Name	Has Administrator Role
Source	Subquery Filter
Type	Dependent subquery ▼
Aggregate	Exists ▼
Exports	 Export  
Filters	 Filter  NOT (OR)  Join 
	Join Role User
	Role User / Role Name Role IN Administrator (All Access)

User specific information #3

Add a user-specific list

1. We're going to need to add a query.
2. Now that we're adding a query, you'll need a method to connect your existing view and the new query.
3. Make sure your method does not have an 'action' – that makes it the Default Method for your portal. It will return the results for the linked queries when the portal loads.

slate [Icons: Messages, Mail, Documents, Megaphone, Folder, Lists, Calendar, Settings]

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

All Portals

Homepage Dashboard

Key	homepage-dashboard
URL	https://pcc-model.test.technolutions.net/portal/homepage-dashboard
Default View	* Default View
Status	Active
Folder	Dive Deeper
Scope	User
Security Type	User

Methods

Method
New Method
* Default Method

Views

Name
New View
* Default View

Queries

Query	Used By
New Query	
Get My Prospects	1 Method : * Default Method

Now add a method and a query. Make sure your method is connected to the Default View, does NOT have action set, and is connected to your query.

User specific information #3

Add a user-specific list

1. We're going to need to add a query.
2. Now that we're adding a query, you'll need a method to connect your existing view and the new query.
3. Make sure your method does not have an 'action' – that makes it the Default Method for your portal. It will return the results for the linked queries when the portal loads.

All Portals > Homepage_Dashboard

Portal Method

Name	* Default Method
Type	GET
Action	
View	* Default View
Output Type	Default Branding
Status	Active

Queries

Query	Node
Get My Prospects	assigned

User specific information #3

Add a user-specific list (continued)

4. Since you're in a portal, "Current User" filters won't work in queries!
5. Use the **@identity** variable instead.
6. Now that we're adding a query, you'll need a method to connect your existing View and the new Query.
7. Don't forget to add a node! You will need this to refer to your query results in the view.

Exports

person_name

person_url  Concatenate

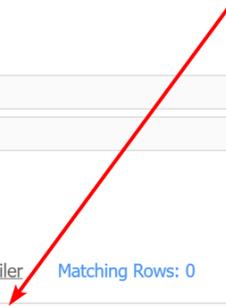
Filters [Check Logic](#) [Query Profiler](#) Matching Rows: 0

[Staff Assigned / GUID](#) IN LIST @identity

Joins

[Staff Assigned](#)

@identity comes from the Scope of the portal - in this portal it is the user who's logged in



Edit Parameters

Output Node

Parameters

Exports

person_name

User specific information #3

Add a user-specific list (continued)

8. In your view, add a new static content block.
9. Use liquid looping to return the query results on the portal page.
10. Refer to the Knowledge Base for specific liquid markup tips:
<https://knowledge.technolutions.net/docs/en/liquid-markup-looping>

The screenshot displays a user interface for a 'User Homepage Portal'. At the top, a header section contains the text 'User Homepage Portal'. Below this, a message reads 'You are a Slate Administrator. With great power comes great responsibility.' To the right of this message, there are two contact details: 'Campus Security: #0608' and 'IT Help Desk: #1111'. A red box highlights a section titled 'Your Assigned Prospects' which contains the following liquid markup: `{% for i in assigned %} {% endfor %}` followed by a table header `Name` and a table row `{i.person_name}`. On the right side of the interface, there is a vertical toolbar with various widgets: 'New Row', 'Static Content', 'Merge Field C...', 'Scheduler', 'Events', 'Form', 'Component', 'Report', 'Social Media', 'Table', and 'Weather'.

User specific information #3

Add a user-specific list (continued)

8. In your view, add a new static content block.
9. Use liquid looping to return the query results on the portal page.
10. Refer to the Knowledge Base for specific liquid markup tips:
<https://knowledge.technolutions.net/docs/en/liquid-markup-looping>

Source

```
1 <html xmlns="http://www.w3.org/1999/xhtml" >
2 <head>
3   <title></title>
4 </head>
5 <body>
6   <h2>
7     Your Prospects
8   </h2>
9
10  <table class="sortable table">
11    <colgroup>
12      <col style="width: 100%" />
13    </colgroup>
14    <thead>
15      <tr class="column">
16        <th>Name</th>
17      </tr>
18    </thead>
19    <tbody>{% for i in assigned %}
20      <tr>
21        <td><a href="{{i.person_url}}" target="_blank">{{i.person_name}}</a></td>
22      </tr>
23    {% endfor %}
24    </tbody>
25  </table>
26 </body>
27 </html>
28
```

OK pause, where are we?

1. Add a portal to the homepage
2. Display some static information to all users
3. Display some user-specific information

★ **User-Specific => Intuitive** ★

A user should be able to operate the dashboard without an instruction manual!

The layout, labels, and actions are clear and require no explanation. As a user, I don't have to scroll past or click around information that is not relevant to me.

The screenshot shows the Slate Summit user homepage. At the top, there is a navigation bar with the 'slate' logo, utility icons, a search bar, and a user profile icon. Below the navigation bar is a pink banner with the text: 'You are accessing a CLEAN SLATE ENVIRONMENT of Slate that is for training purposes only.' The main content area features a welcome message 'Welcome, Jake.' and a notification 'You have accessed Slate from 1 device in the past 72 hours.' The central focus is the 'slate summit' logo with the text 'LAS VEGAS | JUNE 25-27, 2025' and links for 'Full Schedule Now Available!', 'Register', 'Full Schedule', and 'Community Forum'. A red annotation '#1' points to the 'User Homepage Portal' section, which includes a greeting 'Hello Jake. Today is Thursday, May 1, 2025.' and a message 'You are a Slate Administrator. With great power comes great responsibility.' A red annotation '#2' points to the 'Links and Contact Numbers' section, which lists 'Documentation Hub', 'Front Desk Extension: #0827', 'Campus Security: #0608', and 'IT Help Desk: #1111'. A red annotation '#3' points to the 'Your Prospects' section, which contains a table with columns for 'Name' and a list of names: Gato, Carlos; Giovinazzo, Traci; Kelly, Shawn; Nickel, Ajax; and Nickel, Stephen. The footer of the page includes 'Slate (Slate Advancement Showcase)' and 'hzn02 / rnm / pcc-modif-test'.

but wait, there's more

**NOW LET'S *REALLY*
DIVE DEEPER**

GOAL #3 – How about some overview metrics?

Now let's add in:

1. The total number of visitors today
2. The number of tasks assigned to me

(We're keeping this generic and lifecycle-agnostic)

GOAL #3 – Choose your own adventure

“EASY”

Hard code everything

- Start with queries you want your users to run.
- Copy the query into your portal.
- Use liquid markup “size” method to return the count.
- Hard code a link to the query results.

MEDIUM

Query Library FTW

- Start with the query library. Build the filters you care about.
- Use those filters to create queries outside your portal.
- Use the same filters to create subquery export counts in your portal.
- Still – make sure all queries stay in synch.

HARD

Don't Repeat Yourself

- Build the queries ONCE. Put them in a special folder.
- Tell your portal to query for *those* queries.
- Tell your portal to return the count for *those* queries. (Warning: javascript required!)

Overview Metrics #1

The “easy” and direct way –very manual

1. Find the query you want to use in your portal. Run query, then choose Portal as output. Add to your portal that way (basically clone a copy into the portal).
2. Give your query a node and attach it to the default method.
3. Build your view using `{{node.size}}` method to display the total.
4. Beware Current User! Remember, that query filter will need some adjustment inside a portal.

All Queries > Today's Visitors

Today's Visitors

Output: Portal

Export

Rows 1-2 of 2 Prev Next

Person Reference ID	Person Name
242938693	
241890962	

Portal

Homepage Dashboard

Run query, choose Portal, copy to your Homepage portal

Queries

Query	Used By	Updated	Node
New Query			
Get Homepage Metric Queries	1 Method : * Default Method	04/21/2025	queries
Get My Prospects	1 Method : * Default Method	04/21/2025	assigned
Today's Visitors	1 Method : * Default Method	04/21/2025	visitors

Overview Metrics #1

The “easy” and direct way –very manual

1. Find the query you want to use in your portal. Run query, then choose Portal as output. Add to your portal that way (basically clone a copy into the portal).
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Edit Part (Static Content)

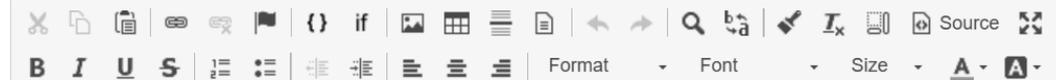
Name

Homepage Queries - Option #1 - The Direct Way

Status

Active

CSS Class Name



Today's Visitors

`{{visitors.size}}`

Overview Metrics #2

The query library method

1. Save your filters in the Query Library. Remember that you can copy/paste from existing queries into the library.

Subquery successfully pasted.

Edit Part

Status: Active

Name:

Source: Subquery Filter

Type: Dependent subquery

Aggregate: Exists

Exports:

Matching Rows: 2

Filters: (OR)

Join: Form Responses

Join: Form Responses / Form

Form / Start Date = 5/1/2025

Form / Type IN Event, Scheduler

Form Responses / Registration Status IN Attended, Registered

Overview Metrics #2

The query library method (continued)

2. Use your library filters in an aggregates query in your portal. This is one query, usually on the System base, that uses independent subqueries to return counts.
3. Use the export you created in your view.
4. Again and still – beware current user filters!

Exports

visitors Count

Filters Query_Profiler Matching Rows: 1

Edit Part

Status: Active

Name: visitors

Source: Subquery Export

Type: Independent subquery

Category: Records

Base: Person

Output: Aggregate

Aggregate: Count

Format Mask:

Matching Rows: 1 Preview Results

Filters: Filter NOT (OR) Join

Library filter: Person (independent subquery) / Has Visit Today

Name: Homepage Queries - Option #2 - The Library Way

Status: Active

CSS Class Name:

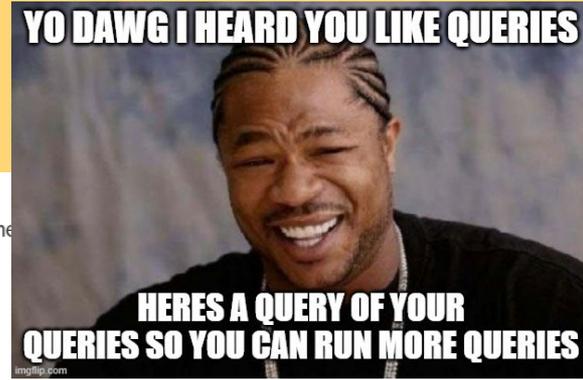
Today's Visitors

{{visitors}}

Overview Metrics #3

Don't Repeat Yourself

1. Since these queries ALREADY exist, write a query to pull them. Put all the queries you want on your dashboard in the same folder to make this easier.
2. We're going to return the id and name of the query, then use those to construct the box on the homepage.
3. Make sure this portal query has a node.



Base Configurable Joins - Query
Execution Mode Retrieve all records each time

Exports

query_guid

query_name

Filters [Query Profiler](#) [Matching Rows: 2](#)

[Folder](#) IN Homepage / Metrics

Overview Metrics #3

Don't Repeat Yourself (continued)

4. Loop over the queries to create one box for each result. The box should contain the name of the query and a placeholder for the count.
5. We're going to use the same functionality as the Estimate Output button on the queries page.
6. Build it into your dashboard so that any query displayed on the homepage (i.e., in a particular folder) is listed with its count.

The screenshot shows a web application editor interface. At the top, there's a header "Edit Part (Static Content)". Below it, there are form fields for "Name" (containing "Homepage Queries - Option #3 - The Custom Way"), "Status" (set to "Active"), and "CSS Class Name".

The main area is a code editor with a rich text toolbar. The code being edited is a loop structure: `{% for q in queries %}`, `{{q.query_name}}`, `#`, and `{% endfor %}`. The loop tags are highlighted in yellow.

Below the code editor, there's a section titled "Queries" with a "New Query" button and a search bar. A table lists queries with columns for Name, Folder, Base, and Updated.

Name	Folder	Base	Updated
Tasks Assigned to Me	Homepage / Metrics	Project Task	04/21/2025
Today's Visitors	Homepage / Metrics	Person	04/21/2025

On the right side, there's a sidebar with navigation links: "Queries", "Reports", "Voyager", "Widgets", "Query Library", "Personal queries", "Shared queries", "All queries", "Exclude archived", "Include archived", "All Folders", "Homepage", "Users", and a dropdown menu for "Users" (showing "Daly, Jake").

At the bottom right, there's a red-bordered button labeled "Estimate Output".

Overview Metrics #3

Don't Repeat Yourself (continued)

7. Use caution! Don't overload or abuse this – keep the number of queries down. And the more complicated the query, the slower the count will be.

Source

```
75   div.dash_table div.metric {
76     color: var(--metric-color,#004d80);
77     font-size: 3em;
78     margin: 5px 0;
79   }
80   div.dash_table span.description {
81     color: var(--description-color,#7f8c8d);
82     font-size:1em;
83   }
84
85   </style>
86 </head>
87 <body>
88   <div class="dashboard-container">
89     <div class="dash_table">
90       {% for q in queries %}
91         <div>
92           <span class="label">{{q.query_name}}</span>
93           <div class="metric" data-query="{{q.query_guid}}">
94             #
95           </div>
96         </div>
97       {% endfor %}
98     </div>
99   </div>
100  <script>
101    const queries = document.querySelectorAll(`div.metric[data-query]`);
102    queries.forEach((query) => {
103      fetch(`/manage/query/build/?id=${query.dataset.query}&cmd=estimate`)
104        .then(response => response.json())
105        .then(response => query.innerText = response.count)
106        .catch(err => console.error(err));
107    })
108  </script>
109 </body>
110 </html>
111
```

Result:

1. Our homepage portal displays overview metrics.
2. As a Slate captain, all I need to do is put a new query in a specific folder to make the metric appear on the homepage.
3. The name of the query becomes the metric title. The number of results is the metric displayed.

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

Welcome, Jake. You have accessed Slate from 1 device in the past 72 hours. [Details](#) [Your Profile](#) [Supervised Login](#)

slate summit

LAS VEGAS | JUNE 25-27, 2025

[Full Schedule Now Available!](#) [Register](#) [Full Schedule](#) [Community Forum](#)

User Homepage Portal

Hello Jake. Today is Thursday, May 1, 2025.

You are a Slate Administrator. With great power comes great responsibility.

Today's Visitors: 2

Tasks Assigned to Me: 1

Now these counts are calculated when you open the homepage

Links and Contact Numbers

[Documentation Hub](#)

Front Desk Extension: #0827

Campus Security: #0608

IT Help Desk: #1111

Your Prospects

Name
Galo, Carlos
Glovinazzo, Traci
Kelly, Shawn
Nickel, Ajax
Nickel, Stephen

Slate (Slate Advancement Showcase) horiz2 / roma / pcc-model-test

GOAL #5 – Provide easy access to action steps

Can we take it even farther?

1. OK great, I can see how many tasks are assigned to me.
2. But can I see the actual list?

(With tasks: just use the tasks panel. But pretend this is a query and I need to take action on every row.)

Now Run the Query

We have everything we need to run that query

1. In your box that displays the metric, let's add a link to run the query it corresponds to.
2. With methods #1 and #2 (hard coding and query library), you'll need to provide the specific query link every time.

Name: Homepage Queries - Option #1 - The Direct Way - WITH Run Button

Status: Active

CSS Class Name:

Today's Visitors

{{visitors.size}}

Run

Tasks Assigned to Me

{{tasks.size}}

Run

```
80 </head>
81 </body>
82 <div class="dashboard-container">
83 <div class="dash_table">
84 <div>
85 <span class="label">Today's Visitors</span>
86 <div class="metric">
87 {{visitors.size}}
88 </div>
89 <div class="button_container">
90 <a class="button" href="/manage/query/query?id=f829990a-9f39-4ed9-b7f6-00664dca3b52&cmd=run" target="_top">Run</a>
91 </div>
92 </div>
93 <div>
94 <span class="label">Tasks Assigned to Me</span>
95 <div class="metric">
96 {{tasks.size}}
97 </div>
98 <div class="button_container">
99 <a class="button" href="/manage/query/query?id=14f472d5-6eab-4b29-9b09-5e3154cad8da&cmd=run" target="_top">Run</a>
100 </div>
101 </div>
102 </div>
103 </body>
104 </html>
```

Now Run the Query

Note the link format

1. Append **&cmd=run** to the end of your query link and you will be taken straight to the results.
2. Make sure to set the Target attribute for your links. Target controls *where* the requested page is opened. Set this to either New Window (will open in a new tab in your browser) or Topmost Window (will replace the Slate homepage with the requested page). If you do NOT set Target, the requested page will replace the homepage portal only – it does not work well or look good.

Link Info Target

Display Text

Run

Link Type

URL

Protocol

<other>

URL*

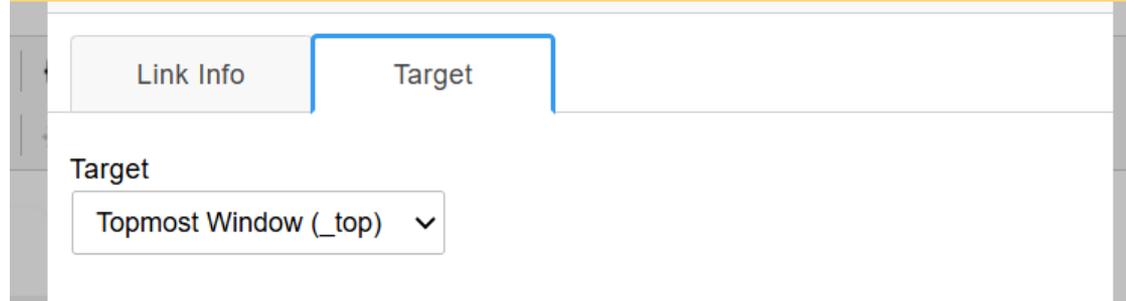
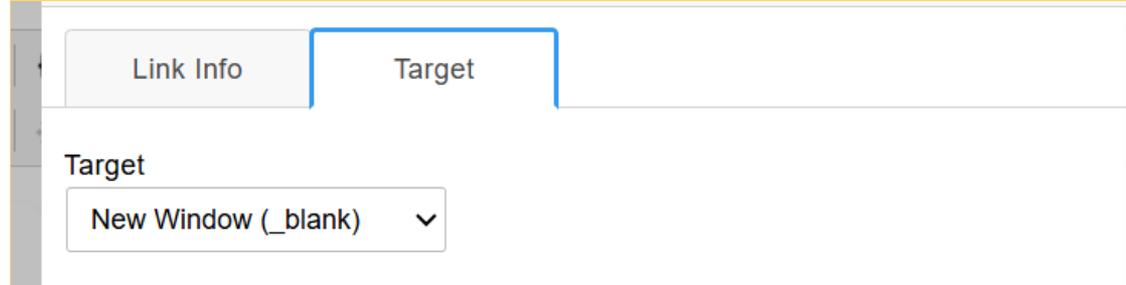
query?id=f829990a-9f39-4ed9-b7f6-00664dca3b52&cmd=run

Browse Server

Now Run the Query

Note the link format

1. Append **&cmd=run** to the end of your query link and you will be taken straight to the results.
2. Make sure to set the Target attribute for your links. Target controls *where* the requested page is opened. Set this to either New Window (will open in a new tab in your browser) or Topmost Window (will replace the Slate homepage with the requested page). If you do NOT set Target, the requested page will replace the homepage portal only – it does not work well or look good.



Now Run the Query

This is actually easier in method #3

1. When you are looping over a list of queries, you already have the GUID of the query.
2. Use that to dynamically create the Run link for each metric.

```
90 <body>
91 <div class="dashboard-container">
92 <div class="dash_table">
93   {% for q in queries %}
94   <div>
95     <span class="label">{{q.query_name}}</span>
96     <div class="metric" data-query="{{q.query_guid}}">
97       #
98     </div>
99
100     <div class="button_container">
101       <a class="button" href="/manage/query/query?id={{q.query_guid}}&cmd=run" target="_top">Run</a>
102     </div>
103   </div>
104   {% endfor %}
105 </div>
106 </div>
107 <script>
108   const queries = document.querySelectorAll(`div.metric[data-query]`);
109   queries.forEach((query) => {
110     fetch(`/manage/query/build/?id=${query.dataset.query}&cmd=estimate`)
111       .then(response => response.json())
112       .then(response => query.innerText = response.count)
113       .catch(err => console.error(err));
114   })
115 </script>
116 </body>
```

All About That Base

Mind your query base!

1. In these examples, we query on Project Task.
2. You might get more traction querying on Person and filtering for records that HAVE a task.
3. With a person-scoped query, you can treat this like a call list and provide links to other pages or forms.

Three dashboard cards are displayed. The first card, 'Today's Visitors', shows a count of 2 and a 'Run' button. The second card, 'Person Version: Tasks', shows a count of 1 and a 'Run' button; this card is highlighted with a red border. The third card, 'Tasks Assigned to Me', shows a count of 1 and a 'Run' button.

A screenshot of a data table titled 'Person Version: Tasks'. The table has one row with the 'Person Reference ID' 023495053. A 'Row Preview' window is open, showing details for the selected record: Record (Lookup Record), Person Reference ID (023495053), Person Name (Giovinnazzo, Traci), and Complete Form (Complete Form). A red arrow points from the 'Person Reference ID' in the table to the 'Person Reference ID' in the row preview.

Contact Report Form

Traci Giovinnazzo (not-tracs-email@test.com)
Not Traci Giovinnazzo? [Click here](#).

Example Contact Report

In this example contact report, we are capturing the details about a single individual at a time. Adding Registration Blocks around the basic contact details will allow for multiple contacts to be captured on a single form. To see an example of how this Group Registration works (as well as autosuggesting records), provision a Slate Advancement Showcase environment from within Clean Slate.

Contact Demographic & Matching Details

Email Address

First Name

Birthdate

GOAL #6 – Delight

What can we add here to improve the day-to-day experience for our team?

1. How about some kudos!
2. Shout out to Jaime and Michele at Carleton College – this is shared with their permission, and they deserve the credit for this amazing idea.

Create a Kudos Form

1. Create a form to collect shout outs for staff.
2. Keep it simple. Not everything has to be mapped, create records, or fill in fields! This can be 100% unmapped.

All Forms

Give Kudos

Folder Dive Deeper
User [Jake Daly](#)
Status CONFIRMED
Scope Person
URL <https://pcc-model.test.technolutions.net/register/?id=652edbf-c6f1-45e6-b71f-357a885eaa01> [Edit URL](#)
Documents [Edit Documents](#)

[Edit](#)

- Edit Communications
- Edit Form
- Export Data
- Export PDF
- New Query
- New Report

Registrants (0)

[Registered](#) [Cancelled](#) [All Registrants](#)

Date	Kudo	Anonymous	Who wrote it
New Registration			

Edit Form

Folder Dive Deeper
Scope Person

Want to give a colleague a shout-out on the homepage?

What would you like to share?

Share

- I'd rather stay anonymous
 You can share my name

Who are you?

Add the kudos to your view

1. Add a new block to your view. Add the list of kudos.
2. Provide a link to the kudos form so staff can add their own shout outs.

User Homepage Portal

Hello Jake. Today is Thursday, May 1, 2025.

You are a Slate Administrator. With great power comes great responsibility.

Today's Visitors

2

Run

Person Version: Tasks

1

Run

Tasks Assigned to Me

1

Run

Links and Contact Numbers

[Documentation Hub](#)

Front Desk Extension: #0827

Campus Security: #0608

IT Help Desk: #1111

Your Prospects

Name
Galo, Carlos
Giovinazzo, Traci
Kelly, Shawn
Nickel, Ajax
Nickel, Stephen

Date	Kudos	From
Thursday, April 24	Jaime and Michele did a really wonderful job with kudos in their Slate Instance and deserve a big shout out!	Jake

Give Kudos

GOAL #6 – Delight, continued

Can we make it look nice?

1.



Layout Adjustments

1. Explore your options! Try different row configurations. Move parts around until they fit the way you want.
2. If you really don't like the row layouts that are available, you can apply custom CSS to adjust them, or you can combine the contents of some blocks and control the layout with custom html.
3. Be creative! Keep trying different layouts.

The screenshot displays a web editor interface for a "User Homepage Portal". The main content area is divided into several sections:

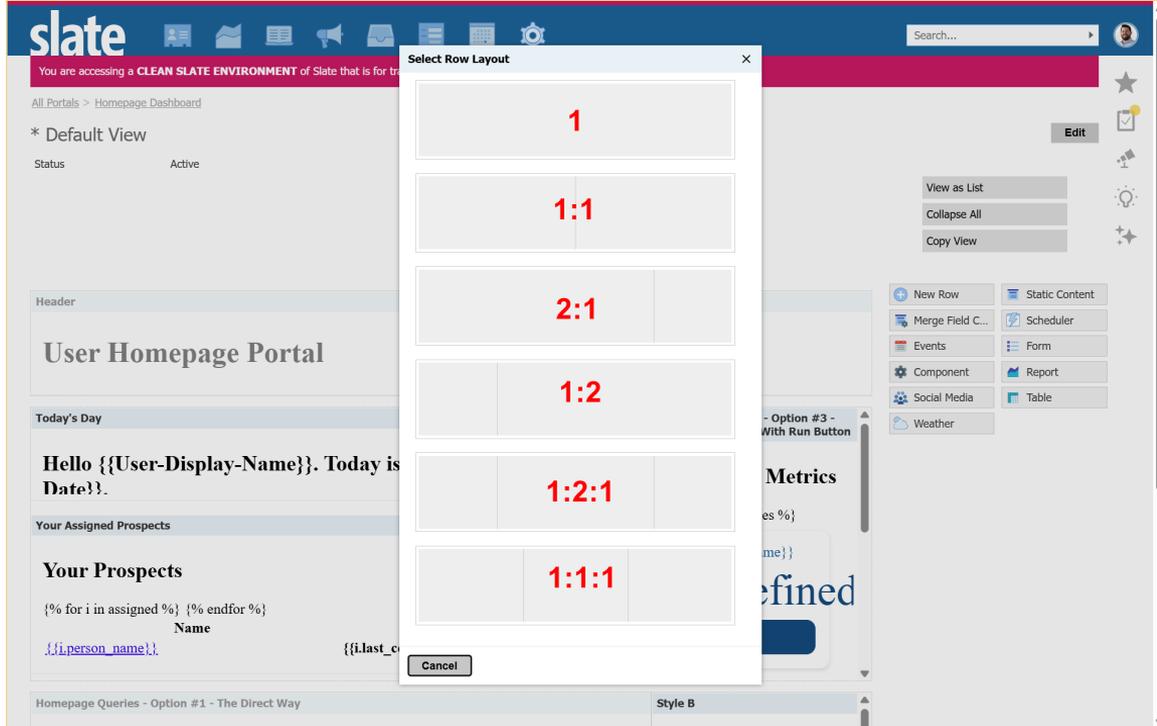
- Header:** Contains the text "User Homepage Portal".
- Today's Day:** Contains the text "Hello {{User-Display-Name}}. Today is {{System-Current-Date}}".
- Your Assigned Prospects:** Contains a table with the following structure:

Name	Days Since Last Contact
{{i.person_name}}	{{i.last_contact}}
- Important Metrics:** Contains the text "Important Metrics" and a "Run" button. The text below the button is "undefined".

On the right side, there is a sidebar with a "Copy View" button and a "New Row" button (highlighted with a red box). Below these are several widget options: "Static Content", "Merge Field C...", "Scheduler", "Events", "Form", "Component", "Report", "Social Media", "Table", and "Weather".

Layout Adjustments

1. Explore your options! Try different row configurations. Move parts around until they fit the way you want.
2. If you really don't like the row layouts that are available, you can apply custom CSS to adjust them, or you can combine the contents of some blocks and control the layout with custom html.
3. Be creative! Keep trying different layouts.



CSS Tips

Some basic guidelines as you explore CSS

1. All content blocks will automatically have a class of “part” – you can use that to apply consistent styles across your portal.
2. Consistent spacing, muted colors, and subtle border radius (rounded corners) can add polish in a hurry.
3. AI resources can be extremely helpful tools for brainstorming and proofreading CSS.

Hello Jake. Today is Thursday, May 1, 2025.

Your Prospects

Name	Days Since Last Contact
Galo, Carlos	30
Giovinazzo, Traci	30
Nickel, Stephen	30
Kelly, Shawn	21
Nickel, Ajax	6

Office Shoutouts

Date	Kudos	From
Thursday, April 24	Jaime and Michele did a really wonderful job with kudos in their Slate instance and deserve a big shout out!	Jake

[Give Kudos](#)

Important Metrics

Gifts to Acknowledge
19
[Run](#)

My Upcoming Events
6
[Run](#)

Tasks Assigned to Me
1
[Run](#)

Today's Visitors
2
[Run](#)

You are a Slate Administrator.
With great power comes great responsibility.

Links and Contact Numbers

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Hello Jake. Today is Thursday, May 1, 2025.

Your Prospects

Name	Days Since Last Contact
Galo, Carlos	30
Giovinazzo, Traci	30
Nickel, Stephen	30
Kelly, Shawn	21
Nickel, Ajax	6

Office Shoutouts

Date	Kudos	From
Thursday, April 24	Jaime and Michele did a really wonderful job with kudos in their Slate instance and deserve a big shout out!	Jake

[Give Kudos](#)

Important Metrics

Gifts to Acknowledge 19 Run	My Upcoming Events 6 Run
Tasks Assigned to Me 1 Run	Today's Visitors 2 Run

You are a Slate Administrator.
With great power comes great responsibility.

Links and Contact Numbers

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Front Desk Extension: #0827

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THANK YOU