

# Using Batch Acquire for Funding Letters and Award Forms

## Uploading Documents

Log in to Slate and navigate to the **Management Database** icon.



Click **Batch Acquire** under **Import**.

Import

[Upload Dataset](#)  
[Batch Acquire](#) ←  
[Consolidate Records](#)

Click **Upload Digital Documents**.

Batch Acquire

Batch Scan

Upload PDF from Document Scanner

Upload Digital Documents

Print Document Separator

Refresh Batches

You will be prompted to name the batch. Please make sure to change the default batch name and use the following naming structure:

**School – Department – Category – Date**

Ex 1: Harpur – Biology – Funding – MMDYY

Ex 2: Fleishman Center – Funding – MMDDYY

Ex 3: Watson – CS – Award Forms – MMDDYY

Ex 4: Watson – Dean's Office – Award Forms – MMDDYY

Upload Digital Documents

Batch Name

Material

Filename	Size	Status
Drag files here.		

0 b 0%

You have the option to preassign a material type to all documents at once. If you do not wish to do this, make sure that **Do not pre-assign material type to batch** is selected. Click **Add Files** and locate the document files then click **Upload**. Alternatively you can drag and drop the file into the box.

### \* Slate Tip

If you will be scanning multiple documents at once, print out a document separator using the **Print Document Separator** button. These can be placed between individual documents and will enable Slate to know where one document ends and the next begins. Once these are placed appropriately, you can scan the documents and save them to your computer. You can hold onto these and reuse as necessary.

Batch Acquire

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# Assigning Documents

If you don't see the documents you uploaded right away, please click **Refresh Batches**.


## Batch Acquire

Batch Scan
Upload PDF from Document Scanner
Upload Digital Documents
Print Document Separator
Refresh Batches

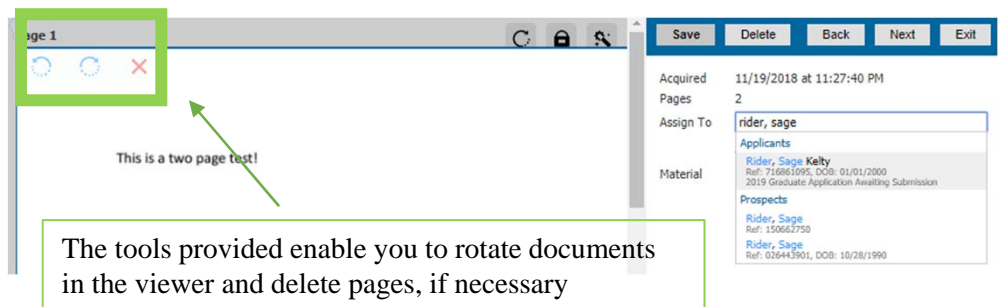
Click on the name of your batch to see thumbnail previews of your documents. Click on the thumbnail to view your documents.

Upload Digital Documents
Print Document Separator
Refresh Batches

<input type="checkbox"/> 11/13/2018 22:30:46	Sets: 1	Pages: 1	11/13/2018 at 22:31:08	Continue Scanning
<input type="checkbox"/> 11/13/2018 22:46:52	Sets: 2	Pages: 2	11/13/2018 at 22:47:20	Continue Scanning
<input type="checkbox"/> 11/19/2018 23:27:27	Sets: 1	Pages: 2	11/19/2018 at 23:27:40	Continue Scanning



In the document viewer, there is an **Assign To** field where you will type the name, B-Number, or Slate Reference number of the appropriate record. This will populate with existing application and prospect records like other search bars in Slate – please be sure to select the correct record.



This is a two page test!

The tools provided enable you to rotate documents in the viewer and delete pages, if necessary

Save	Delete	Back	Next	Exit
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Acquired 11/19/2018 at 11:27:40 PM  
Pages 2  
Assign To rider, sage  
Applicants  
Rider, Sage Kelly  
Ref: 716861095, DOB: 01/01/2000  
2019 Graduate Application Awaiting Submission  
Prospects  
Rider, Sage  
Ref: 150662750  
Rider, Sage  
Ref: 026443901, DOB: 10/28/1990

## \* Slate Tip

Slate has limited functionality when it comes to searching by B-Number. If you are searching by B-Number and the student does not have an active application in the current cycle, then Slate will not be able to find that record. In such cases, searching by name will produce more accurate results.

Students admitted before Slate was implemented may not have a Slate record. If you are uploading documents for a student that does not have an existing record, you can use the **Create Record** feature that is located under the **Assign To** field. Click **Create Record** and enter the appropriate information in the window that opens. When done, click **Create**.

### New Person

Email	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Birthdate	<input type="text"/> mm/dd/yyyy

## Assigning Documents (Continued)

Below the **Assign To** field, there is a drop-down menu labeled **Material**. In this drop-down, you must select **Record Folio**.

Save Delete Back Next Exit

Acquired 09/10/2019 at 09:10:47 AM

Pages 1

Scope Folio/Application

Assign To Rider, Sage Kelty

Create Record Clear

Material Record Folio

Memo

After selecting the appropriate application or folio, a second drop-down menu will appear that contains a list of possible materials.

For the purposes of funding documentation, the appropriate choices include:

- Funding Offer Letter
- Funding Letter Signed: Tuition Only
- Funding Letter Signed: Stipend Only
- Funding Letter Signed: Stipend & Tuition
- Funding Letter Signed: Stipend, Tuition & PDSF

\*PDSF: Provost's Doctoral Summer Fellowship

For the purpose of uploading awards forms, the appropriate choice is:

- Award Form

Save Delete Back Next Exit

Acquired 09/10/2019 at 09:10:47 AM

Pages 1

Scope Folio/Application

Assign To Rider, Sage Kelty

Create Record Clear

Material Record Folio

Funding Offer Letter

Memo

The **Memo** field must be filled out when uploading funding documentation as this information is required by Human Resources. Please make sure to use the following naming structure is used:

20-21 AY  
 20-21 F  
 20-21 S  
 20-21 AY / Updated  
 20-21 F / Updated  
 20-21 S / Updated

AY should be used for full academic year offers, F should be used for Fall offers and S should be used for spring offers.

Click **Save** when you are ready.

Save Delete Back Next Exit

Acquired 09/10/2019 at 10:53:07 AM

Pages 1

Scope Folio/Application

Assign To Rider, Sage Kelty

Create Record Clear

Material Record Folio

Funding Offer Letter

Memo 19-20 AY

# Viewing Documents

The uploaded material will appear on the **Materials** tab. In the event the student has multiple tabs which don't fit in the header area, the "+" sign in the header area will show the additional tabs that are available. The material type, memo, and the name of the person who uploaded the document will appear here.

The screenshot shows the Slate application interface. At the top, there is a blue header with the 'slate' logo, navigation icons, and a search bar. Below the header, a red banner indicates 'You are accessing a TEST ENVIRONMENT of Slate that is for testing purposes only.' and 'Snapshot Date: 01/28/2019 09:17 AM'. The main content area shows the user 'Rider, Sage Kelty' and the applicant ID '716861095'. A navigation bar contains tabs for 'Dashboard', 'Timeline', 'OnlineApp'20', 'App: Fall 2019 Awaiting Submission', 'App: Fall 2019', 'App'18', 'App: Fall 2018', 'App: Fall 2018', 'App'17', and '2015 Graduation'. A '+' icon is highlighted in a green box. Below the navigation bar is a table with columns 'Date', 'Description', 'Record', and 'User'. The table contains one row: '09/10/2019', 'Award Form', 'Folio', and 'Ben'. A green box highlights this row. To the right of the table is a sidebar with a 'Materials' section containing links for 'Restore Material' and 'Portfolio'. Below the sidebar is a list of items: '2015 Graduation', 'Profile', 'Materials', 'Prospect Details', and 'Graduation Status'.

Date ▲	Description	Record	User
09/10/2019	Award Form	Folio	Ben

The templates for funding letters as well as the recommendation for award forms can be found here:  
<https://www.binghamton.edu/grad-school/resources/forms.html>

If you have any questions, please contact the Graduate School at [slate@binghamton.edu](mailto:slate@binghamton.edu).