Slate Knowledgebase

Slate serves as the Customer Relationship Management (CRM) platform for the UC Davis Graduate School of Management (GSM), enabling efficient storage and retrieval of student data for comprehensive reporting and query purposes. This Slate Knowledgebase document consolidates all relevant training resources into a centralized repository, streamlining access to essential functions related to Queries and Reports. The resources for both Queries and Reports are organized in a progressive manner, ranging from foundational to advanced functionalities.

Query New User:

Query: Advanced User

- [Slate User-Defined SQL Functions](#)
- [Custom SQL Hybrid Queries](#)
- [Direct SQL Access](#)
- [Slate Interactive Encore: Understanding Configurable Joins and How to Use Them](#)

- [Dependent Subqueries and Independent Subqueries](#)
- [Consecutive Years of Giving and Sequential Value Groups](#)
- [Group by Functionality in Subquery Exports](#)
- [Using Formulas in Queries](#)

Reports: New User

- [Report Builder Overview: Structure and Navigation](#)
- [Data Explorer](#)
- [Reporting on Multi-Valued Fields](#)
- [Report and Query Timeout Errors](#)
- [Report Permissions](#)

- [Pinned Filters in Reports](#)
- [Parameters in Reports](#)
- [Customizing Colors in Reports](#)
- [Report Widgets](#)
- [Report Widgets for Student Success](#)
- [Geo-Spatial Prospecting](#)

Reports: Advanced User

- [Creating, Editing, and Rendering Reports](#)
- [Using Reports to Compare Data](#)

- [Formulas in Reports](#)
- [Cluster Report](#)