

If it Ain't Broke, You Can Still Fix it

Utilizing the Workflow Editor to Enhance Existing Processes

AUGUST | 2023





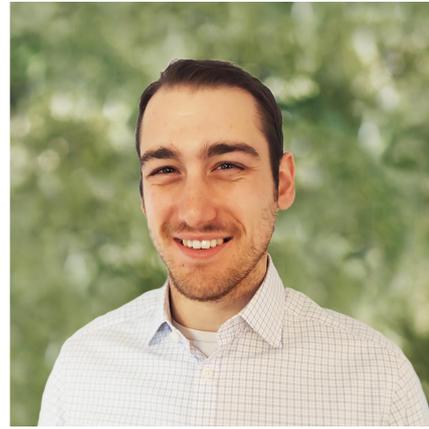
Agenda

- ① Overview
- ② Transitioning to the Workflow Tool
- ③ Workflow: Beyond Application Review

PRESENTERS

Rocco Porcellio

- + Senior Slate Student Success Implementation Strategist
- + Slate user since 2017, Carnegie since Feb. 2022
- + The Intelligent and Conceptual Searcher



Ryan Simpson

- + Slate Enrollment Implementation Strategist
- + Slate user since 2017, Carnegie since Nov. 2021
- + The Considerate and Clever Magician



PRESENTERS

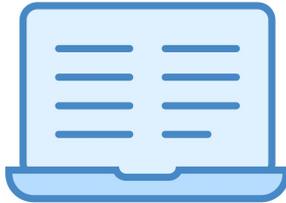
Justin Pierce

- + Slate Enrollment Implementation Strategist
- + Slate user since 2015, Carnegie since May 2022
- + The Confident and Energetic Magician



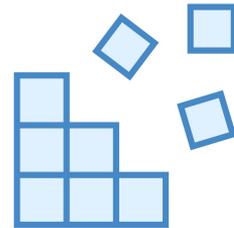
Reader

- Module/tool designed for reading applications and other processes
- Reader (Legacy): Pre-existing, legacy tool discouraged in favor of workflows



Workflow

- All-in-one environment for creating and managing Reader workflows



Why transition to Workflows?

Efficiency/Consistency

- All-in-one environment with drag-and-drop functionality
- Easier to build; easier to maintain

Transparency/Auditing

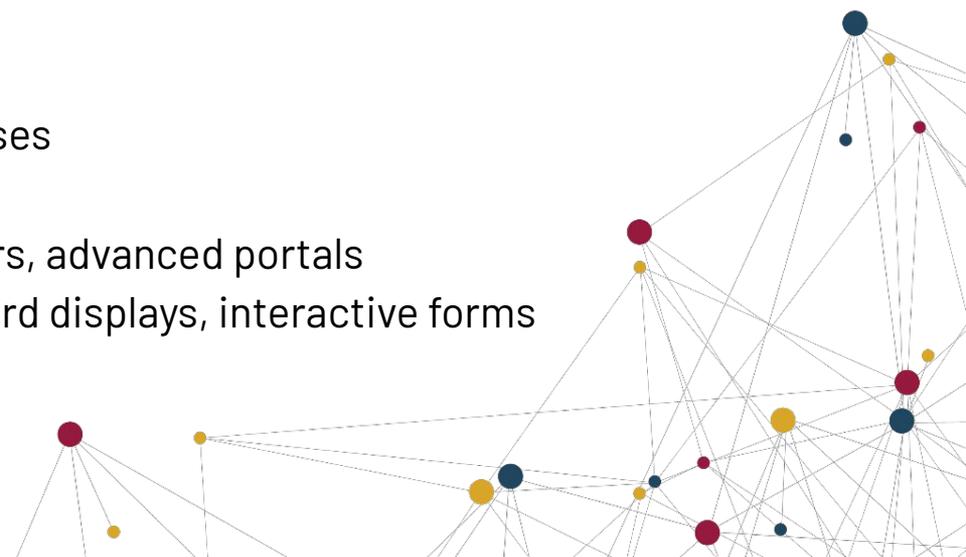
- Easier to troubleshoot issues

Approachability

- Easier staff training with clear processes

Enhancements

- Displaying information: Data containers, advanced portals
- Updating information: embedded record displays, interactive forms as tabs, pop-up forms



Workflow Transition Tips

Build on your timeline

- Workflows can exist concurrently with your Legacy Reader build
- Custom permissions can be used to hide the workflow from users

Have a plan for go-live

- Wait for a low volume activity day (or evening)
- Inactivate the Default Applications Reader via the Applications Query Base
- Update workflow permission

Using batch management and auditing

- Use queries to update application files via batch management
 - Clear existing queue assignments and move to new bins
- Ensure files run through the rules for Reader/Queue Assignment
- Use audit queries to confirm that assignments and bins are correct

If you do it right, the transition will be seamless.



Enhancements: Taking workflows further

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Enhancement: Displaying Data in Workflows

Data Containers

- Transcript metadata - Clearly parse transcripts

Portal Displays

- SIS passthrough - See SIS screens right in Slate
- Aggregate data - Shape your class

Views

- Sorts - Prioritize your work
- Filters - Hide or show specific groups by default



Building a Data Container

Output of a Data Container

Add data to the page for this container. [Helpful Tips](#)

Page Title

Exports

Section: Academic History

Header: School 1 Level of Study Rank

Institution

Location

Degree

Header: School 2 Level of Study Rank

Institution

Location

Degree

Academic History #1

Graduate

Institution Mahindra United World College of India
Location Pune, India
Degree Master of Design

High School

Institution Creighton University
Location Omaha, NE
Degree Bachelor of Architecture

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Data Container

Transcript Metadata View

Edit Material Stream

Properties Page Builder Documents

Optional: Select the documents associated with the school record that should appear after the data.

Document #1 [Delete](#)

Material Type

Limit # (Optional)

Sort

[Add Document](#)

Save

Delete

Cancel

Academic History #1

New York University

CEEB 2562

Level of Study Undergraduate

Material Metadata

Material Information Dec 19 2022 4:16PM - sch_final_transcript

Student Information

Class Rank 50

Class Size 200

GPA 3.8

GPA Scale 4

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The screenshot displays the 'Edit View' dialog in the Slate application. The dialog is titled 'Edit View' and has two tabs: 'Settings' and 'Access Permissions'. The 'Settings' tab is currently selected and contains the following configuration options:

- Name:** Default
- Status:** Active (dropdown menu)
- Default View:** Use this view as the default for all users for this base.
- Pinned:** Pin this view for all users with access to this view.
- Exports:** A list of exportable fields: 'Export', 'Record' (250px), and 'Bin' (150px).
- Filters:** A filter configuration area with a 'Filter' button, logical operators 'NOT' and 'OR', and a 'Join' button. Below these are three join options: 'Join Application', 'Join Application / Person', and 'Join Lookup Bin'.
- Sorts:** A 'Sort' button.

At the bottom of the dialog are three buttons: 'Save', 'Delete', and 'Cancel'. The background interface shows a 'Views' section with a 'Default' view selected, and a 'Create View' button in the top right corner. The user's name 'hera3 / luna / usr' is visible in the bottom right corner of the main interface.

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Beyond Admissions Review: Updating Data in Reader

Transcript Processing & School Updates

- Review Form Merge Fields & Dictionaries
- Query String Parameters

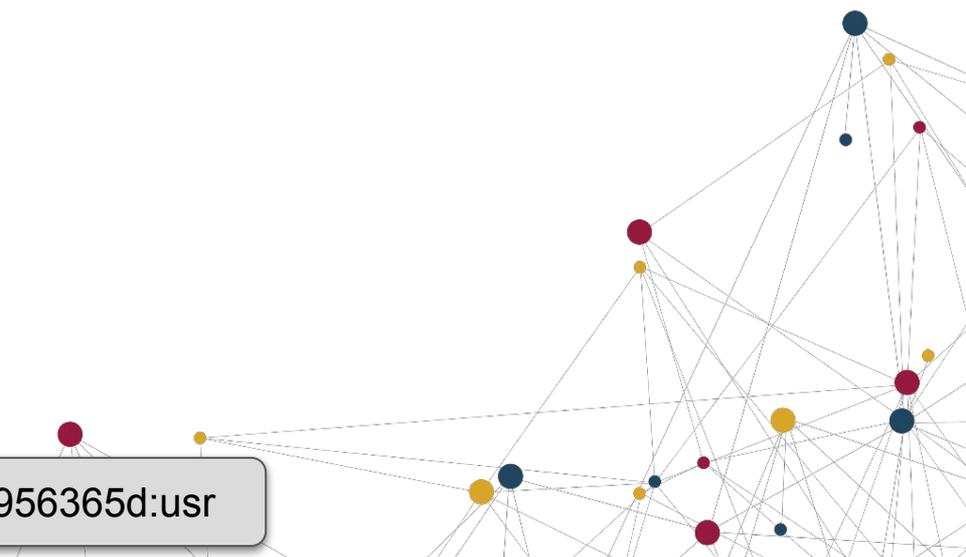
Record Access within Reader Tab

- Reader Portal
- CSS, HTML, JQuery

GPA Recalculation

- Reader Portal
- Query Strings

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Beyond Admissions Review: Updating Data in Reader

Transcript Processing & School Updates - Pop-up Forms

- Review Form Merge Fields & Dictionaries
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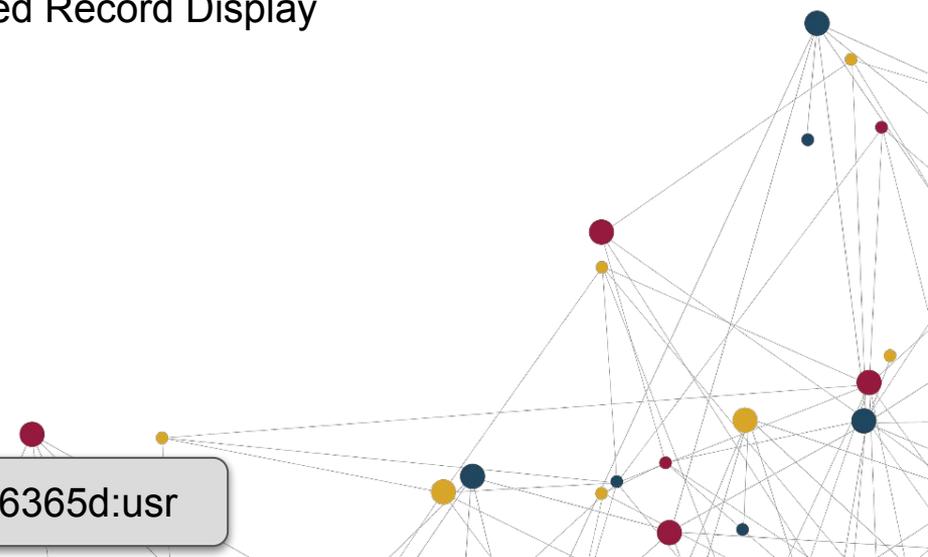
Record Access within Reader Tab - Embedded Record Display

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- CSS, HTML, JQuery

GPA Recalculation - Interactive Form Tab

- Reader Portal
- Query Strings

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Transcript Processing & School Updates

slate
308876644 Simpson Test, Ryan Test BQLP: Fall 2023
Queer Leadership

Dashboard

Application

Transcripts

Test Scores

Academic Reco...

Non-Academic...

Essay

Work Samples

Interviews

Additional Mat...

Prior Application

Reader Review

Materials

Student Info

Applying To:	Bard Queer Leadership Project 2023, Fall 2023
Counselor:	Jaclyn Hall
Name (Preferred):	Ryan Test Ryan Test Simpson Test
Home Address:	123 N Main St Houston, TX 77002-1037 United States
Country of Citizenship / Citizenship Status:	United States / US
Current School:	New York University New York, NY
Current Grade / H.S. Graduation Year:	/
Financial Aid Applicant:	No / Yes
BRS Eligibility:	Does not reside in BRS Scholarship eligible county
Referral:	This student was not referred by an alum

Family Info

Type	Name	Age	Education	Deceased	Resides with Student
Legal Guardian	Rocco Porcellio	53		No	Yes
Mother	Laura Bald		Graduate school	No	Yes
Parent	Justin Test			No	Yes
Step-Father	Chris Besse			No	Yes
Step-Parent	Courtney Mumma			No	Yes

Tests

Type	Subtype	Date	Total	Score 1	Score 2	Score 3	Score 4	Status
ACT		01/01/2021	10					Verified
IELTS		02/01/2022	6.5	6 (Listening)	7 (Reading)	7 (Writing)	6 (Speaking)	Verified

Processor Review Form - School Information

Reader Form

First Reader (please select your own name from the list if you are completing this form for a First Read)

Standardized Tests

Has the applicant submitted standardized test scores that should be taken into consideration?

Standardized Test Scores Comments

Qualitative Factors

Teachers' Comment Rating

Teacher's Comments (Optional)

Counselors' Comment Rating

Counselor's Comments (Optional)

Writing Content Rating

Writing Grammar and Style Rating

Writing Comments (Optional)

Remove from Queue
Annotations
Review Form / Send to Bin

Suitcase ID: 84ce3ebd-e853-4d49-9945-d5a36956365d:usr

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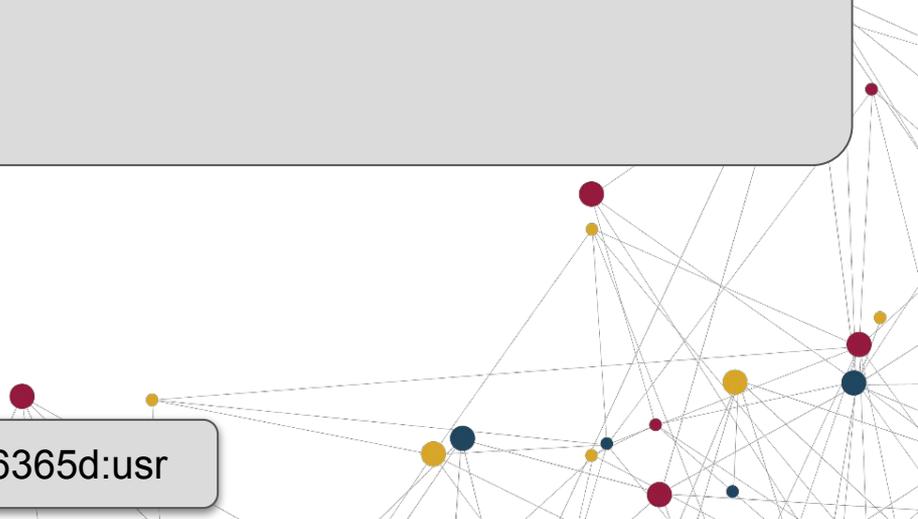
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Record Access Within Reader

slate
308876644 Simpson Test, Ryan Test BQLP: Fall 2023
Queer Leadership Search...

Simpson Test, Ryan Test

Application Submitted: 2022-11-18T11:50:53

Date	Description	Record	User
New Material			
01/05/2023	Academy application	BQLP: Fall 2023	Carnegie
12/19/2022	Final Transcript (Official) TESTING - New York University	Folio	Carnegie
12/01/2022	Test Score (Duolingo, TOEFL, or IELTS)	BQLP: Fall 2023	Carnegie
11/18/2022	Transcript (Copy) - New York University	Folio	Carnegie
11/18/2022	Criminal History Explanation	COL: Fall 2023	
11/18/2022	Disciplinary Explanation	COL: Fall 2023	
11/18/2022	Disciplinary Explanation	BQLP: Fall 2023	

Materials

[Restore Material](#)

[Portfolio](#)

Remove from Queue
Annotations
Review Form / Send to Bin

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Interactive Form Within Reader Tab

slate
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Form in Tab

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Applying To:	Bard Queer Leadership Project 2023, Fall 2023
Counselor:	Jaclyn Hall
Name (Preferred):	Ryan Test Ryan Test Simpson Test
Home Address:	123 N Main St Houston, TX 77002-1037 United States
Country of Citizenship / Citizenship Status:	United States / US
Current School:	New York University New York, NY
Current Grade / H.S. Graduation Year:	/
Financial Aid Applicant:	No / Yes
BRS Eligibility:	Does not reside in BRS Scholarship eligible county
Referral:	This student was not referred by an alum

Family Info

Type	Name	Age	Education	Deceased	Resides with Student
Legal Guardian	Rocco Porcellio	53		No	Yes
Mother	Laura Bald		Graduate school	No	Yes
Parent	Justin Test			No	Yes
Step-Father	Chris Besse			No	Yes
Step-Parent	Courtney Mumma			No	Yes

Tests

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Teachers' Comment Rating

v

Teacher's Comments (Optional)

Counselors' Comment Rating

v

Counselor's Comments (Optional)

Writing Content Rating

v

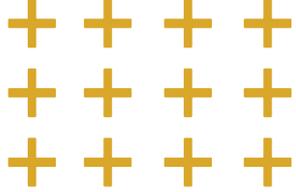
Writing Grammar and Style Rating

v

Writing Comments (Optional)

Remove from Queue
Annotations
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Suitcase ID: 84ce3ebd-e853-4d49-9945-d5a36956365d:usr



Resources

- **Query String Parameters**

<https://knowledge.technolutions.com/hc/en-us/articles/360032795252>

- **Reader Review Forms**

<https://knowledge.technolutions.com/hc/en-us/articles/360000265931-Reader-Review-Forms-Settings>

- **Workflow Editor**

<https://knowledge.technolutions.com/hc/en-us/articles/4404356484763-Workflows#bin-queue-automations-0-3>

- **Portals in Reader**

<https://knowledge.technolutions.com/hc/en-us/articles/360033470231-Portals-in-Reader>

- **Matching Criteria for System Objects**

<https://knowledge.technolutions.com/hc/en-us/articles/360033350231>



Thank You!

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Rocco Porcellio

rporcellio@carnegiehighered.com

Ryan Simpson

rsimpson@carnegiehighered.com

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