



THE HIDDEN RULES POWERING YOUR INSTANCE

SLATE SUMMIT 2026

Nina Lifshay & Darian Quinn, Carnegie | Drew Griffin, Rockhurst University



Drew Griffin

Director of Admission Operations &
Technology | Slate Captain

Institution Snapshot

- Total Enrollment: 3,000 Students
- Annual Application Volume: 5,000 Applications
- New FTC Fall Enrollment: 315 Students
- Slate Since: 2018
- Enrollment Operations Team: 2 Staff Members



Today's Presenters



Darian Quinn

Slate Communications Strategist



Nina Lifshy

Senior Enrollment Analytics Specialist

Learn More About
Carnegie Solutions



BEHIND THE MUSIC: SLATE RULES

THE UNSEEN FORCE BEHIND EVERY SLATE PROCESS

What Are Rules? Rules are Slate's automation engine. They:

- Update Records & Statuses
- Trigger Communications
- Move Workflows Forward
- Populate Queries & Populations
- Drive Portals, Reports, Deliver, and Integrations

"If the rule breaks, the process breaks."

THE "BEHIND THE MUSIC" REALITY

Every Slate instance has:

- Legacy Rules No One Remembers Creating
- Duplicate/Conflicting Logic
- "Temporary" Rules from 4 years ago
- One Rule Silently Holding Together an Entire Process
- Rules Still in Local Base

And then someone edits or disables it...  

WHAT RULES CAN BREAK

Operational Impacts

PERFORMANCE & RENDERING

- Queries render slowly
- Reports time out or fail to load
- Portals become sluggish
- Materialized View queries fail at 900-sec timeout

COMMUNICATIONS

- Drip campaigns miss send windows
- Emails fail to trigger
- Populations update too slowly for timely messaging

DATA & WORKFLOW

- People fail to enter populations quickly
- Applications get stuck in Workflow Bins
- Incorrect statuses or updates occur
- Reporting and funnel counts become inaccurate

ERRORS, ERRORS & MORE ERRORS

Rule Log

This log displays the most recent errors and warnings experienced while executing rules for your database.

▲ Errors typically require intervention to resolve. ⚠ Warnings are frequently transient and resolve over time.

Timestamp Time through Time

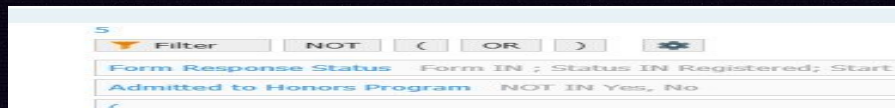
186 [Complete](#)

Results 1 to 186

Timestamp	Message
▲ 04/25/2026 04:11:23 PM	Cannot continue the execution because the session is in the kill state. A severe error occurred on the current command. The results, if any, should be discarded., 0.
▲ 04/25/2026 01:43:12 PM	Cannot continue the execution because the session is in the kill state. A severe error occurred on the current command. The results, if any, should be discarded., 0.
▲ 04/21/2026 09:43:03 AM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/19/2026 11:44:27 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/19/2026 09:41:35 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/18/2026 09:42:37 AM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/17/2026 11:39:52 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/17/2026 07:38:22 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 04/11/2026 12:46:06 AM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 03/28/2026 04:38:29 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 03/28/2026 02:38:10 PM	Execution Timeout Expired. The timeout period elapsed prior to completion of the operation or the server is not responding. Operation cancelled by user.
▲ 03/27/2026 11:25:30 AM	One or more errors occurred.
▲ 03/27/2026 11:03:04 AM	One or more errors occurred.
▲ 03/27/2026 10:39:57 AM	One or more errors occurred.
▲ 03/27/2026 10:10:38 AM	One or more errors occurred.
▲ 03/27/2026 09:58:28 AM	One or more errors occurred.
▲ 03/27/2026 09:37:49 AM	One or more errors occurred.
▲ 03/27/2026 09:17:37 AM	One or more errors occurred.
▲ 03/27/2026 08:50:16 AM	One or more errors occurred.
▲ 03/27/2026 08:36:36 AM	One or more errors occurred.
▲ 03/27/2026 08:16:19 AM	One or more errors occurred.
▲ 03/27/2026 07:56:13 AM	One or more errors occurred.
▲ 03/27/2026 07:32:24 AM	One or more errors occurred.
▲ 03/27/2026 07:16:50 AM	One or more errors occurred.
▲ 03/27/2026 06:52:24 AM	One or more errors occurred.
▲ 03/27/2026 06:27:29 AM	One or more errors occurred.

RULES | THE SOLUTION 🎸

- **Carnegie**
 - *Small Shop = Little to No Capacity*
- **Rules Audit**
- **Enhanced Rules Structure**
 - *Naming Conventions & Foldering*
- **Better Use of Exclusivity Groups**
 - *Previously, Each Rule had ALL the Filters*
- **Didn't Touch Bin Rules...yet**



THE AUDIT

1. Export

2. Organize

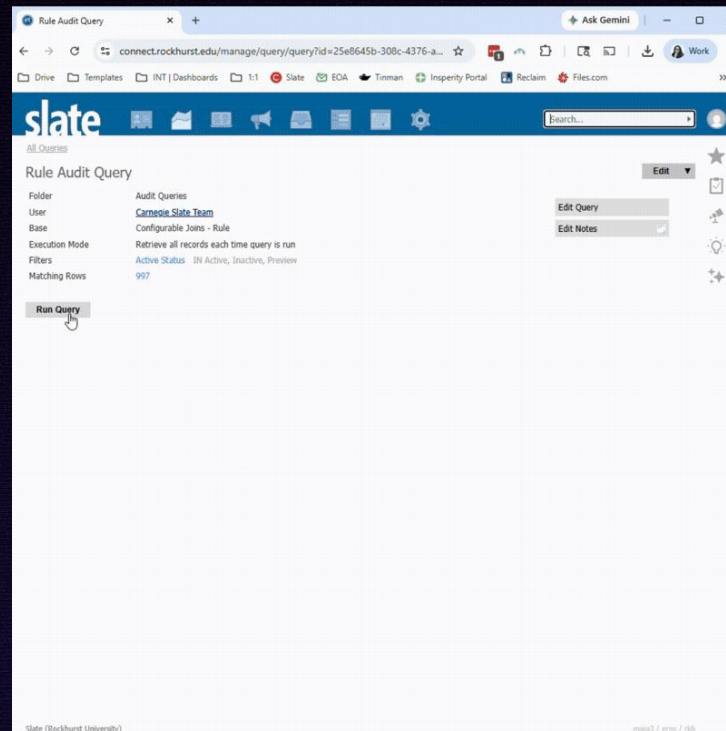
3. Check Errors

4. Prioritize

5. Review

6. Notate

Get the query and spreadsheet in the suitcase:
f7a84fb4-f98f-48d9-9b7d-9c8180c4b24b:rkh



RULES | THINGS WE DISCOVERED FROM AUDIT

- A sizable number of rules required update every term → easy to miss
- Exclusivity groups had overlapping priorities
- Very few exclusivity groups used → extra processing load
- Many rules still in the local base
- Updated CJ rules had one-to-many joins outside of subqueries
- Contradicting rules hidden in different folders
- Many rules used NOT IN with very long lists
- Lots of ORs and NOTs → some rules with as many as four ORs
- Rules erroring regularly or taking an exceptionally long time to run
- Foldering structure only half used
- Old rules left in Preview status

RULES | NAMING CONVENTIONS IN ACTION

Name	Folder	Exclusivity Group	#
CJ - Not Admitted- Do Nothing	academic advisor assgn...	Academic Advisor	1
CJ - Assign Academic Advisor ABSN TUG	academic advisor assgn...	Academic Advisor	4
CJ - Assign Academic Advisor BSN TUG	academic advisor assgn...	Academic Advisor	5
CJ - Assign Academic Advisor RN-BSN TUG	academic advisor assgn...	Academic Advisor	10
CJ - Assign Academic Advisor Engineering	academic advisor assgn...	Academic Advisor	15
CJ - Assign Academic Advisor Pre-med/bio	academic advisor assgn...	Academic Advisor	20
CJ - Assign Academic Advisor Pre-med/chem	academic advisor assgn...	Academic Advisor	25
CJ - Assign Academic Advisor BIIA	academic advisor assgn...	Academic Advisor	30
CJ - Assign Academic Advisor CHHS	academic advisor assgn...	Academic Advisor	35
CJ - Assign Academic Advisor ARDN	academic advisor assgn...	Academic Advisor	40
CJ - Assign Academic Advisor A&S - A-K	academic advisor assgn...	Academic Advisor	45
CJ - Assign Academic Advisor A&S - L-Z	academic advisor assgn...	Academic Advisor	50
CJ - Assign Academic Advisor for Post Bac Pre Health	academic advisor assgn...	Academic Advisor	55
CJ - Assign Academic Adviser CATCH ALL	academic advisor assgn...	Academic Advisor	60

EXCLUSIVITY GROUPS

How Exclusivity Groups Optimize Rule Performance:

- Stops Unnecessary Rule Processing
- Improves Overall System Performance
- Prevents Conflicting Automations
- Reduces Risk of Delays and Timeouts
- Creates Cleaner and Easier-to-Manage Logic

MAKE IT EVERGREEN

Small & Direct

Each rule addresses one action and ideally one population.

Affirmative

Filter for what IS true, not what is NOT true.

Independent

Rules should not depend on other rules to function.

Stable

Built to survive cycle prep without manual edits.

Testable

Preview mode validates before going live and when processes change.

TIP: CATEGORY ON TERMS

Instead of hardcoding term values, assign categories like 'Current Term' and 'Previous Term' to make rules evergreen automatically.

Summer 2025	Previous Term
Fall 2025	Previous Term
Spring 2026	Current Term
Summer 2026	Future Term
Fall 2026	Future Term

Edit Prompt

DetailsXML ConfigurationNotes

ID

ba61afaa-3468-46ef-b823-c31ef8a19e0b

Status

Active

Folder

Entry Term

Value

Spring 2026

Category

Current Term

Edit Part

Status

Active

Name

Previous Term

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Exists

Exports

Export

Filters

FilterNOT(OR)Join

JoinField Values

JoinField Values / Lookup Prompt

Field Values / ID = app_entry_term

Lookup Prompt / CategoryCategory IN entry_term - Previous Term

COMMON MISTAKES

✗ Building in Local

→ The time has come to move to Configurable Joins

✗ Using NOT IN

→ Replace with subquery NOT EXISTS

✗ Filtering in the Negative

→ Affirmative Conditions are Faster

✗ Long List of Prompts

→ Choose Options that Minimize Prompt Chains

✗ Custom Formulas / SQL

→ Avoid Custom Logic; Use Native Filters

✗ Rules Left in Preview Status

→ Activate or Delete — Preview Still Runs

✗ Using Comparisons Unnecessarily

→ Use Other Filter Types When Available

✗ Using OR to Address Multiple Populations

→ Break Them Out Into Smaller Rules

RULES | TIPS & TRICKS

- Check Rules: Bi-Weekly or Monthly Task
- Delete Rules Not in Use: Inactive or Preview Status
- Utilize CJ Naming Prefix in all New Rules
- Re-Evaluate & Re-Assess your Rule Groups
 - *Especially when changing populations or adding new programs*
- Turn Rules On/Off in Chunks; Ease into the Transition to See if Anything Breaks



Suitcase: f7a84fb4-f98f-48d9-9b7d-9c8180c4b24b:rkh

RULES | THE SUITCASE

Rules Audit Query, Sheet, and Tips

User
Suitcase ID
Comments

Carnegie Slate Team
f7a84fb4-f98f-48d9-9b7d-9c8180c4b24b:rkhh



ROCKHURST
UNIVERSITY

CARNEGIE

Use this query in conjunction with the spreadsheet template linked below to get started on your rules audit! *Before exporting, be sure to update the 'Link to Rule' export to your instance's URL.* Be sure to make a copy or download as an excel sheet to edit for your own use.

Sample Rules Audit Sheet

Looking for additional guidance? Check out this Knowledge Base article to help you identify what rules are Erroring or flagging Warnings, as well as other problem areas: [Troubleshooting Tips for Database Health](#)

Remember these tips ([read more about them here](#)) as you are auditing and building:

- **Always build in Configurable Joins**
- **Use operators efficiently**
 - Limit NOT and OR operators in your rules.
 - If you find yourself relying on OR in your rules, consider breaking the rule into multiple rules and using an exclusivity group.
 - Generally filter in the *positive* (include only those records that satisfy a given filter criterion), rather than in the *negative* (exclude all records that don't satisfy a filter criterion).
 - Choose the option that requires the fewest selections when using In vs Not In, don't forget you can use a Not Exists subquery in place of Not In
- **Avoid custom formulas or SQL**
- **Deactivate rules in Preview status**

Items	Fields	Prompts	
Name	Type	As Of	Home Page
Add Item			
➤ Rule Audit Query	Query	4/24/2026	Home Page
➤ Rules with Specific Field ID or GUID (Parameter)	Query	5/12/2026	Home Page

ID: f7a84fb4-f98f-48d9-9b7d-9c8180c4b24b:rkhh

QUESTIONS?

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