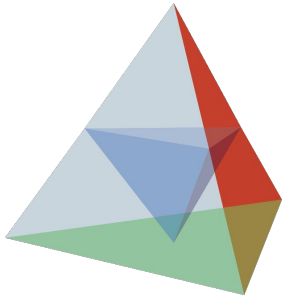

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Dive Deeper Webinar Series

Taking the Plunge: Migrating Legacy Reader to the Workflow Editor

May 8, 2024

Presentation Resources

Note
This presentation is being recorded. All slides, screenshots, code, and links are available in our presentation portal.

If you experience syncing issues during our presentation (e.g. voice echo/static or slides not updating), please refresh your web browser.

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Taking the Plunge: Migrating Legacy Reader to the Workflow Editor

Overview

Intros

Definitions

Why Take the Plunge

Pros & Cons

When to Take the Plunge

Best Practice & Tips

Live Demo & Resources

Helpful Links

Q & A

Contact Info

(ask questions along the way!)

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Introductions

Emma Hayek
Senior Slate Consultant, Slate Services

Mark Perillo
Senior Slate Consultant, Slate Services

Gwen Page
Client Support Engineer, Technolutions

Human Capital Research Corporation (HCRC)
Providing three decades of service in customized research and analytics to colleges and universities, particularly in financial aid and pricing, enrollment management and planning, student recruitment and retention, market analysis and institutional benchmarking.

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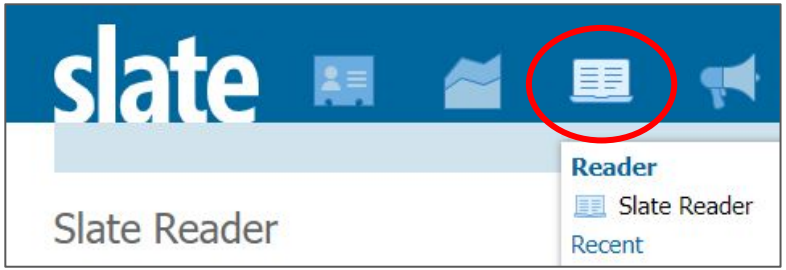
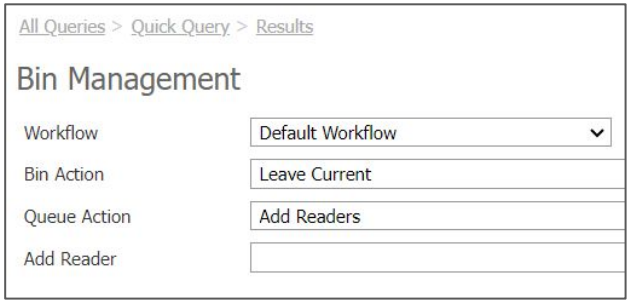
Definitions: Reader vs. Workflow

Reader vs. Workflows vs. Default Workflow: What do these words mean?

- In the Legacy Reader, you use batch management via the Default Workflow
- Once in the new Workflow Editor, you still go into Reader to review applications





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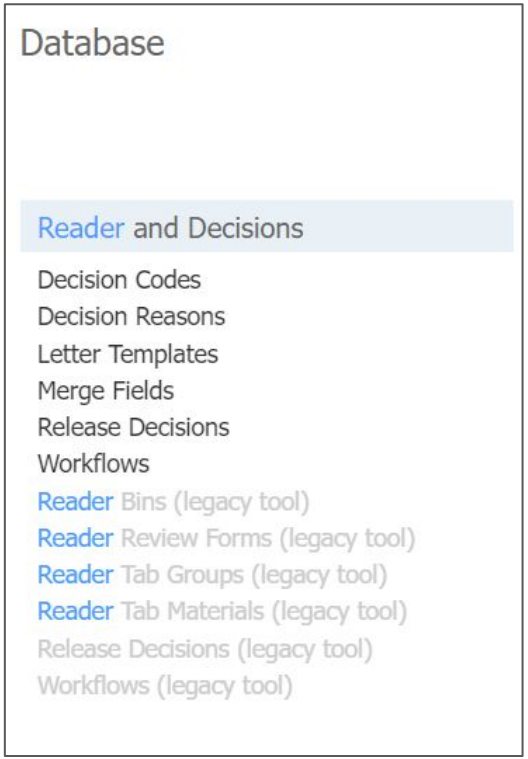
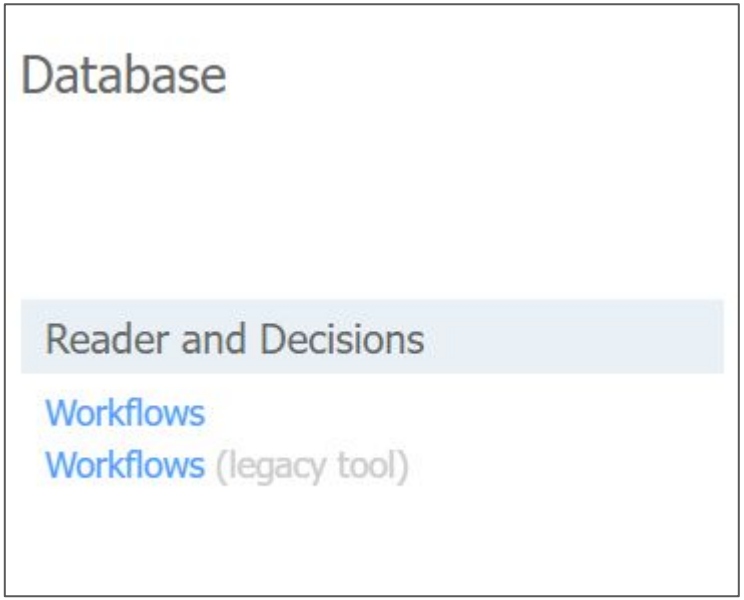
Comparison: Legacy Reader vs. Workflows



vs.



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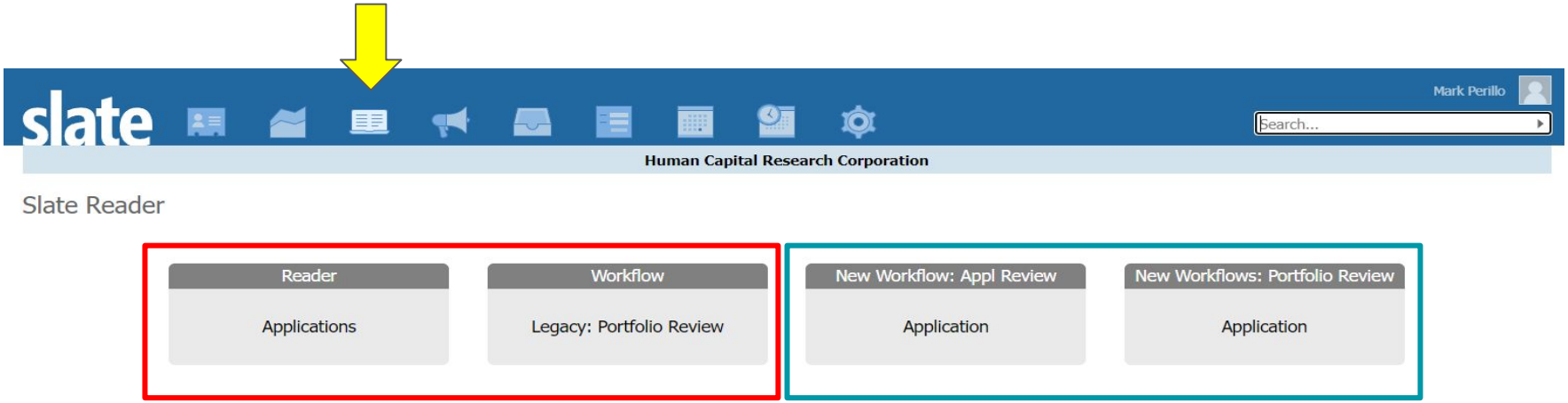
👀 Reader vs. Workflow: User Experience



Legacy Reader and Workflow

New* Workflows Tool

*(as of Fall 2021)

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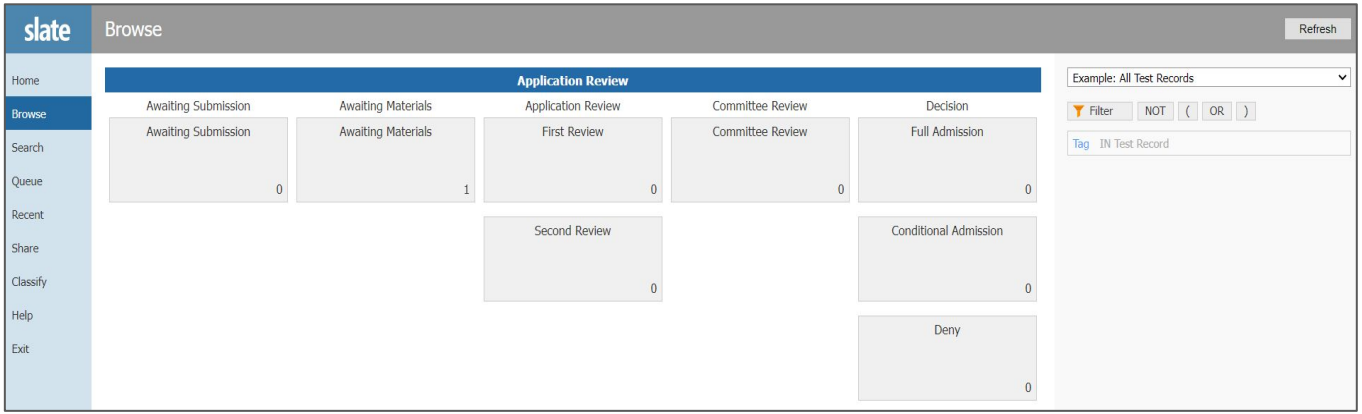
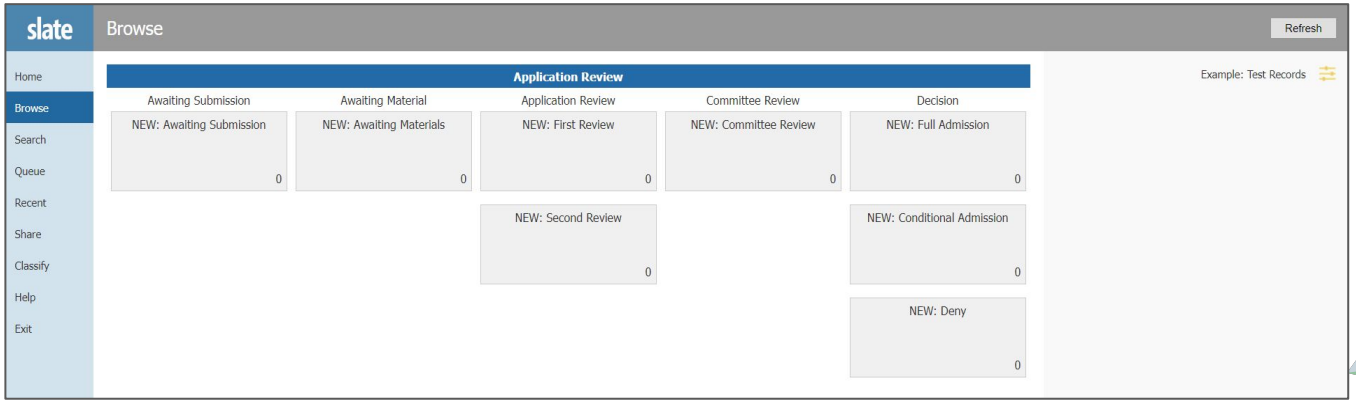
Reader vs. Workflow: User Experience

Legacy Reader



New Workflows



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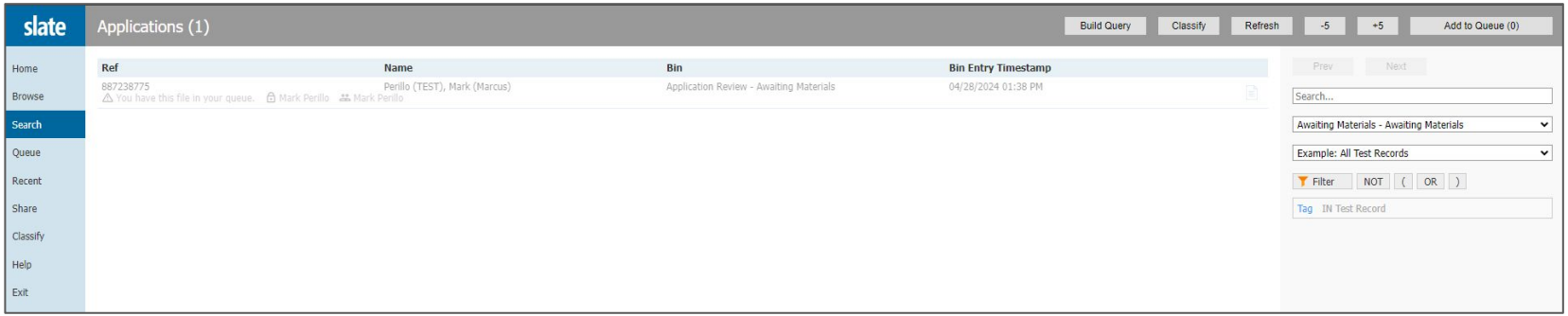
Reader vs. Workflow: User Experience

Legacy Reader



New Workflows

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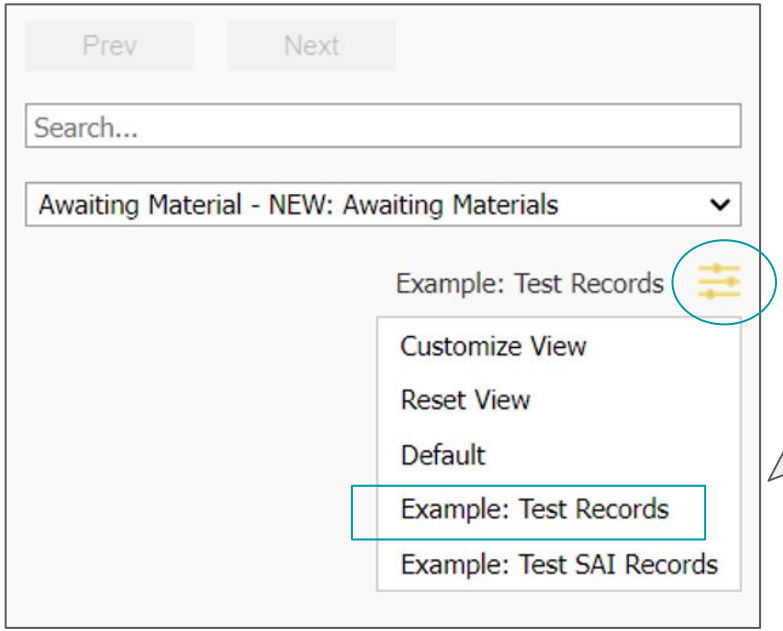
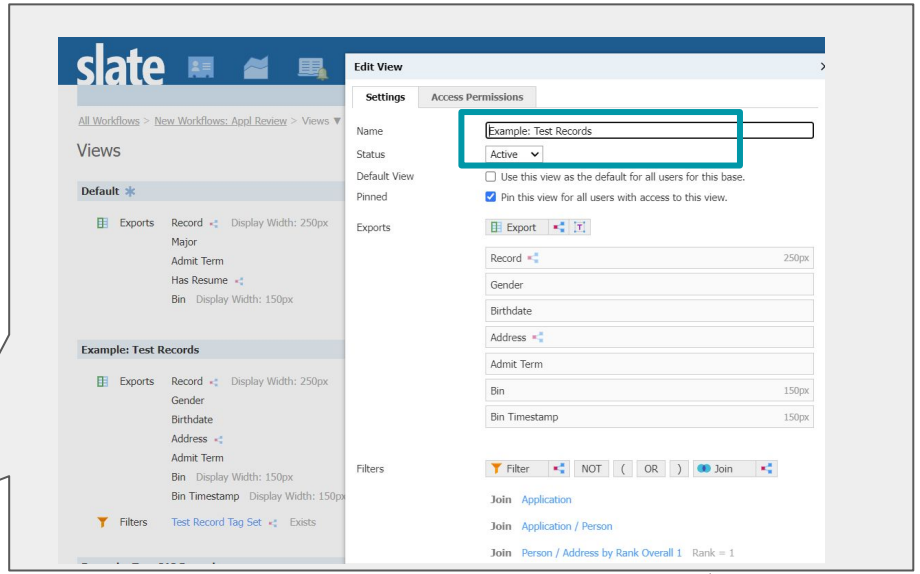
Advantages: Workflow Views

- Customized views in a more user-friendly robust format





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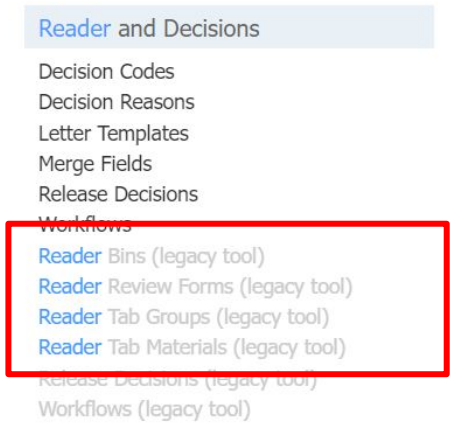
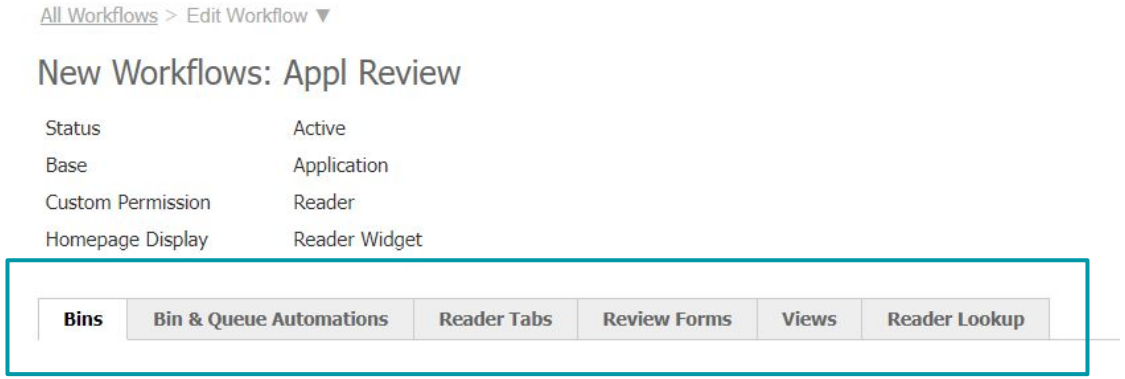
Advantages: Centralized Management

- Centralized management of bins, tabs, rules, materials, etc.



Legacy: Database
(not shown: Reader Query View and Rules)



Tabs Inside Each Workflow

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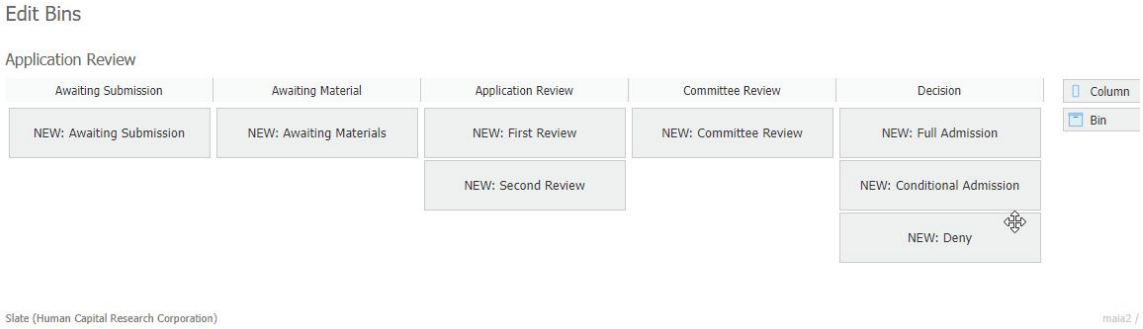
Advantages: Drag-n-Drop Bin Management

- Create and reposition Columns and Bins without setting an order.



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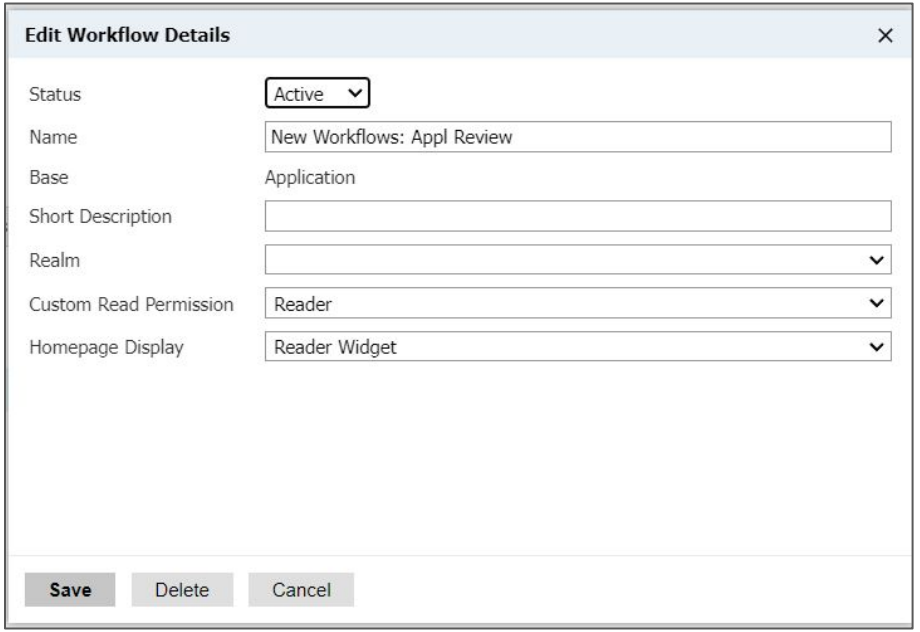
Advantages: Flexible Permissions

- Flexible Workflow Permissions
  - Individual Bins (No Change)
  - Entire Workflow New
  - Realms New
  - https://knowledge.technolutions.net/docs/realms



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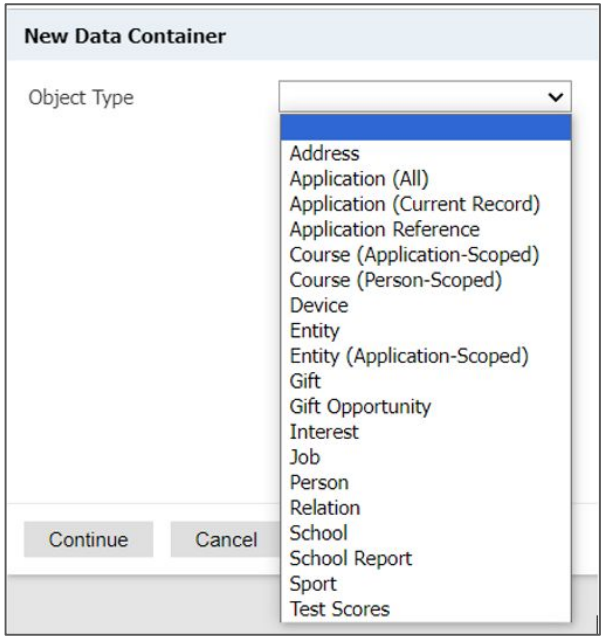
Advantages: Data Containers

- Data Containers New
  - No need to create custom .pdf documents to display application widget (i.e. one-to-many) data for reading.
  - A good solution if you are not ready to build a reader portal.
  - https://knowledge.technolutions.net/docs/data-containers



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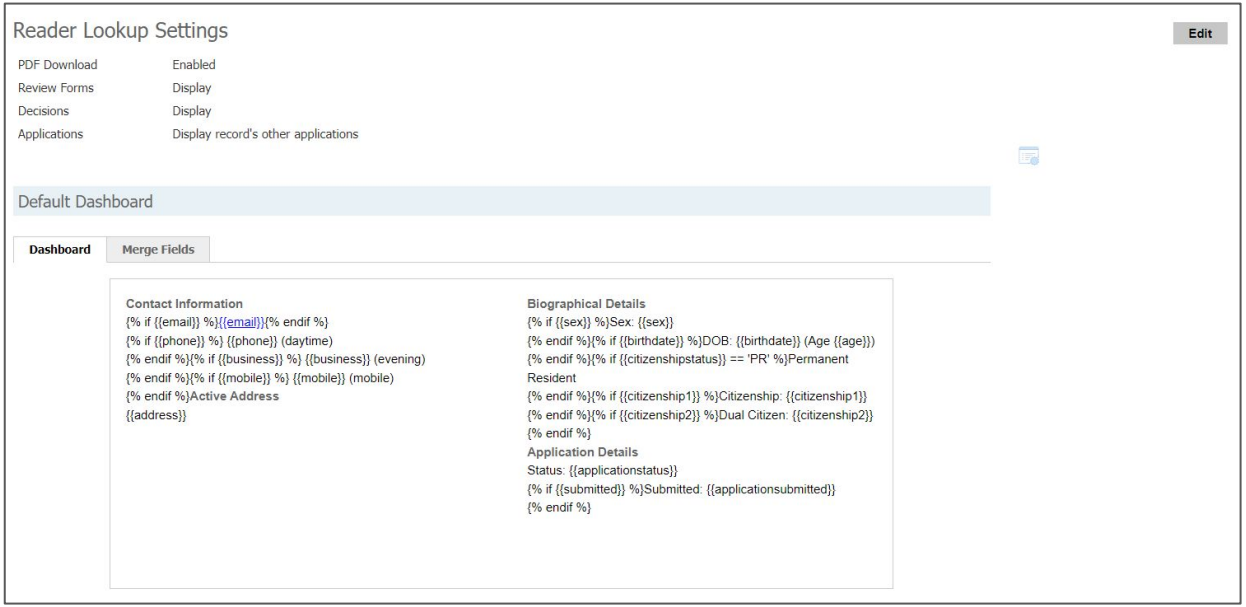
Advantages: Edit the Reader Lookup Settings

Database → Workflows → *Select Your Workflow* → Reader Lookup



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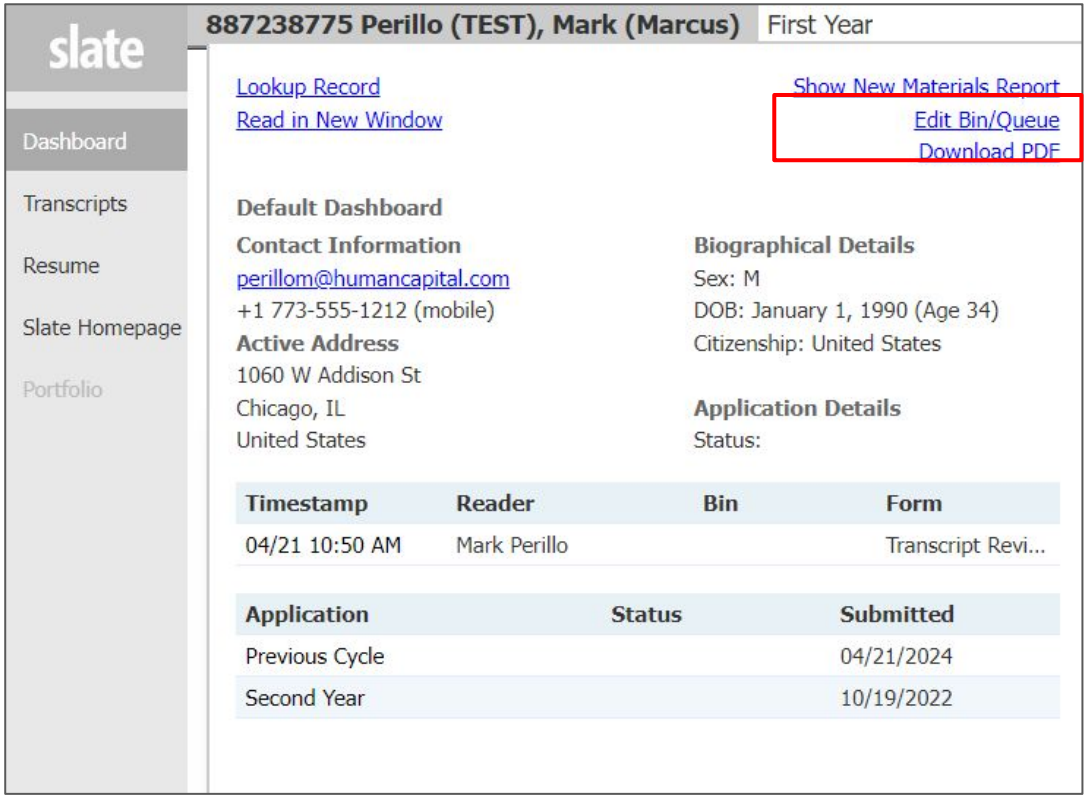
Tip: Hide the Reader Lookup: Edit Bin/Queue



This is a way to control this at a more granular level than the Application Update permission currently allows *(link to feedback requests for this in the presentation resource portal)*

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Tip: Hide the Reader Lookup: Edit Bin/Queue

```
<script>
    $(document).ready(function() {$('a[data-href*="cmd=bin"]').hide(); });
</script>
```

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Other Reasons to Take the Plunge

- You can now leverage Configurable Joins!! 🔥🥳
- **Maintainability**
  - Reader (legacy) is no longer Technolutions' primary tool for reading and reviewing
  - Future new Workflow functions/features not backwards capable
  - Stay current with Technolutions *
  - Skillset consideration for future hires
- **Flexibility**
  - Better control/access/permission

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New Workflow Editor: Room for Improvement

- Required knowledge of Configurable Joins *can* be intimidating
  - e.g. filtering on the existence of a portfolio or finding a material that has been received after a reader review form was submitted (Best Practice & Tips section and suitcase)
- Limited permissibility for bin Views
- New material highlight currently doesn't work (Feedback Request)
- Applicant search bar in the top right functions differently (Feedback Request)
- Can't copy workflows (Feedback Request)

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When to Take the Plunge?

Start building now!

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When to Take the Plunge?

Start building now!

- Set up a custom permission while you're building your new workflow(s) so it doesn't affect other users
- Can be a slow transition depending on school/business case
- Build in production with rules inactive, then refresh Test and activate rules
- Prerequisite skills?
  - Very good KB workflow documentation (KB Articles section)
  - CJs (Community Conversations)

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Don’t Just Rebuild: Reassess!

- Just like when you implemented Slate, take the opportunity to identify efficiencies, process changes, and other improvements.
- Things to consider:
  - When to build multiple workflows vs. a single workflow with multiple groups
  - Having a Workflow Bin naming convention
  - Viewing Reader Tabs: Add conditional logic if material exists vs. tab greyed out
  - Create application populations for viewing appropriate applications
  - Convert SQL permissions within query bases to custom Populations

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Reduce, Reuse, Recycle

Objects from the legacy Reader can be reused in Workflows:

- Reader Review Forms
- Reader Portal Dashboards
- Custom Permissions
- Custom PDF Materials

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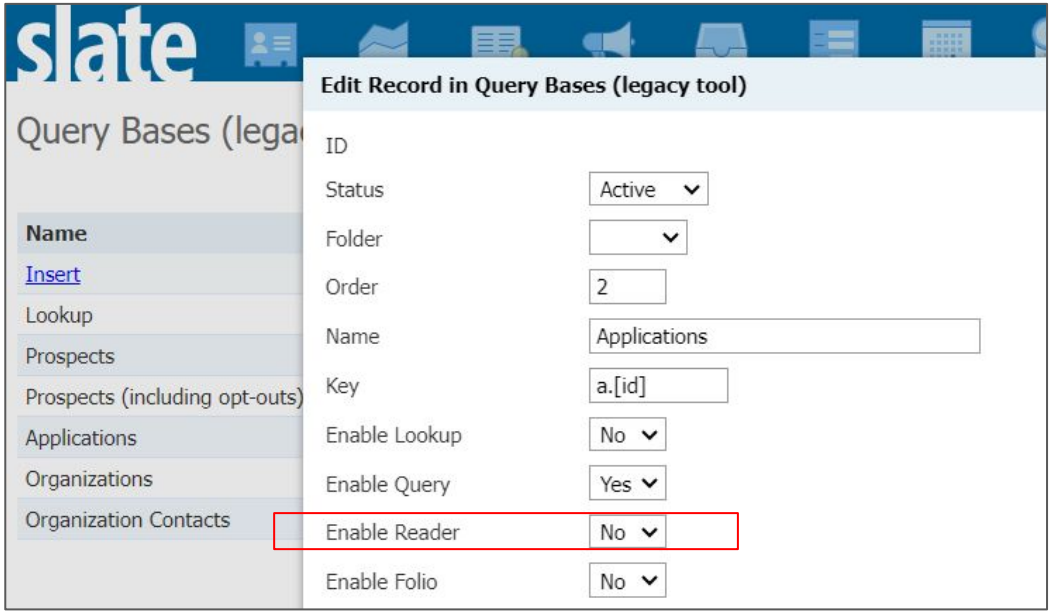
How to Say Goodbye to Default Reader

Database → Query Bases (legacy tool) → Applications → Enable Reader = **No**



Before Link After Link

Note:

This removes it from the actual Reader tool as an option, but doesn't remove it from Batch Management in a query run (Current Feedback Request).

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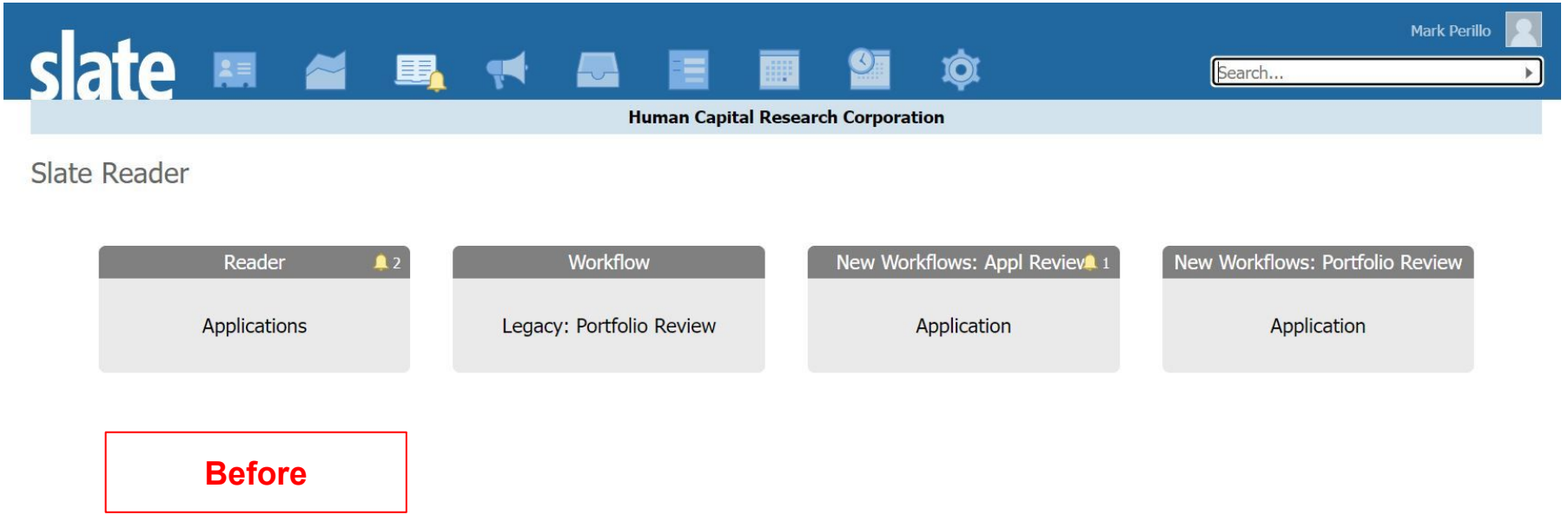
How to Say Goodbye to Default Reader



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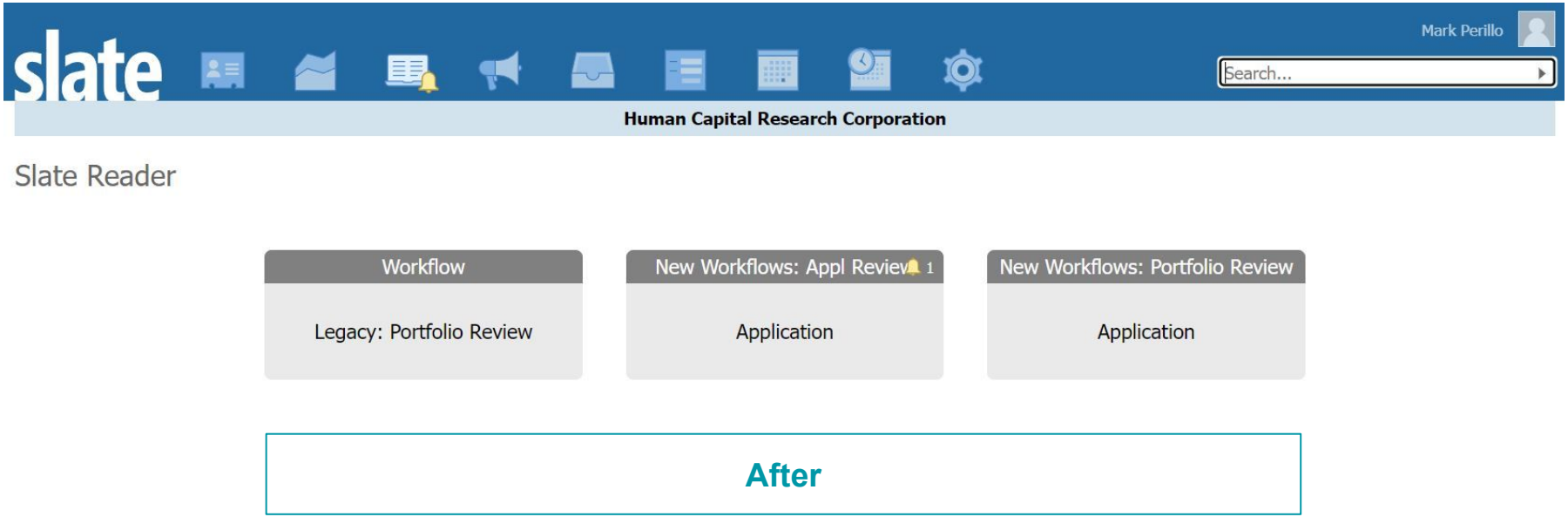
How to Say Goodbye to Default Reader



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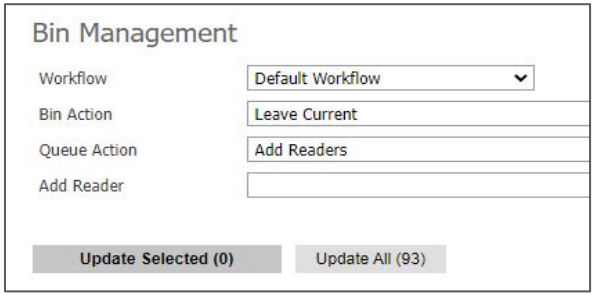
Where Default Workflow Hangs Around



- Query Output: Batch Management ➡ Bin

- Person and Application dashboards
  - You can use .css to hide the dashboard *(Best Practice & Tips section)*
- Details on student's application tab.
  - You can use .css to hide the workflow details *(BP & Tips section)*
- Note: You still have to add Admin PDF download to get the download app PDF functionality, so you may need to go into Reader Tab Materials even once you've ditched Legacy Reader.

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Hide the Default Workflow: Dashboard Details

```
<html xmlns="http://www.w3.org/1999/xhtml">
  <head>
    <title></title>
    <style type="text/css">.dashboard div[style="float: left; margin-bottom: 0; width: 33%;"] {
display: none; }
    </style>
  </head>
  <body>
        …
  </body>
</html>
```

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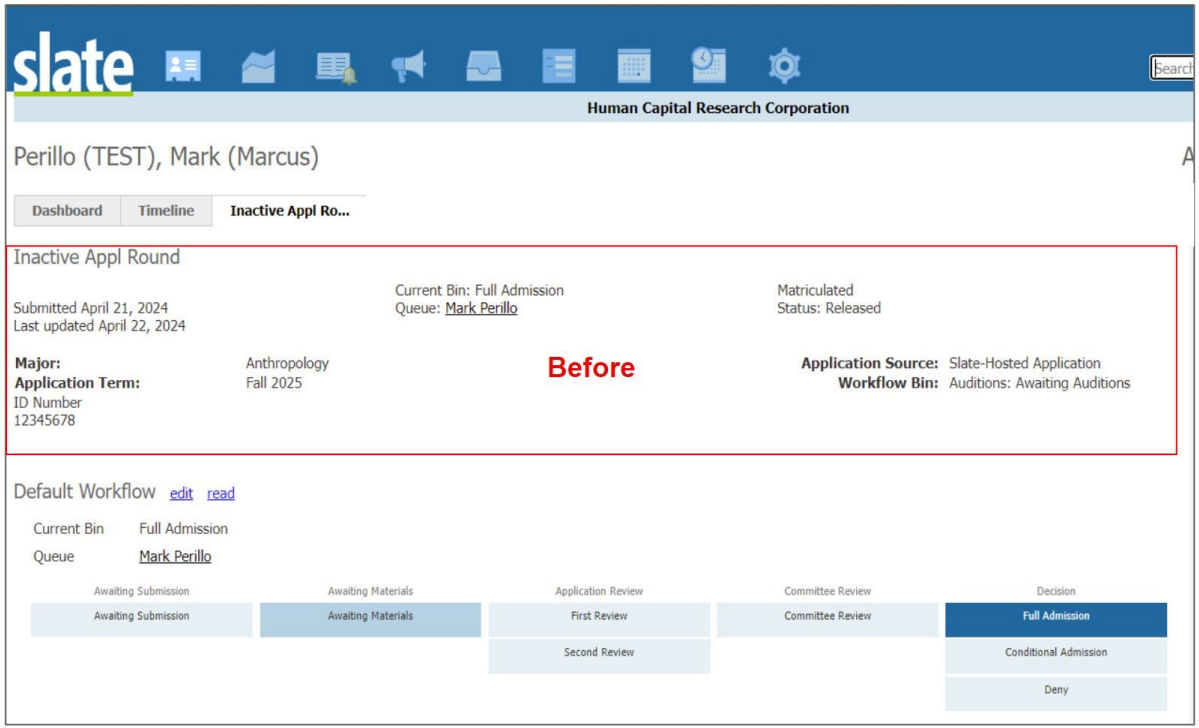
Hide the Default Workflow: Dashboard Details



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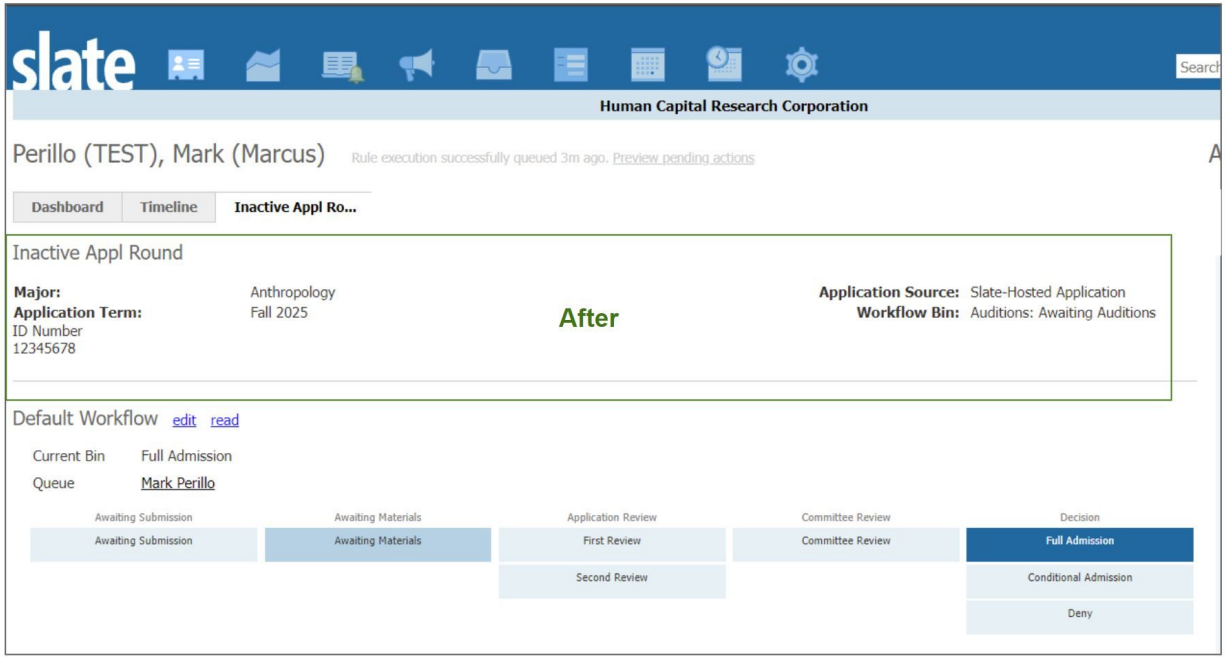
Hide the Default Workflow: Dashboard Details



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Hide the Default Workflow: Visual Bin Diagram

```
<html xmlns="http://www.w3.org/1999/xhtml">
  <head>
    <title></title>
    <style type="text/css">div[style*="margin-top: 10px;"]:first-of-type
{
  display: none ;
}
    </style>
  </head>
  <body>
        ...
  </body>
</html>
```

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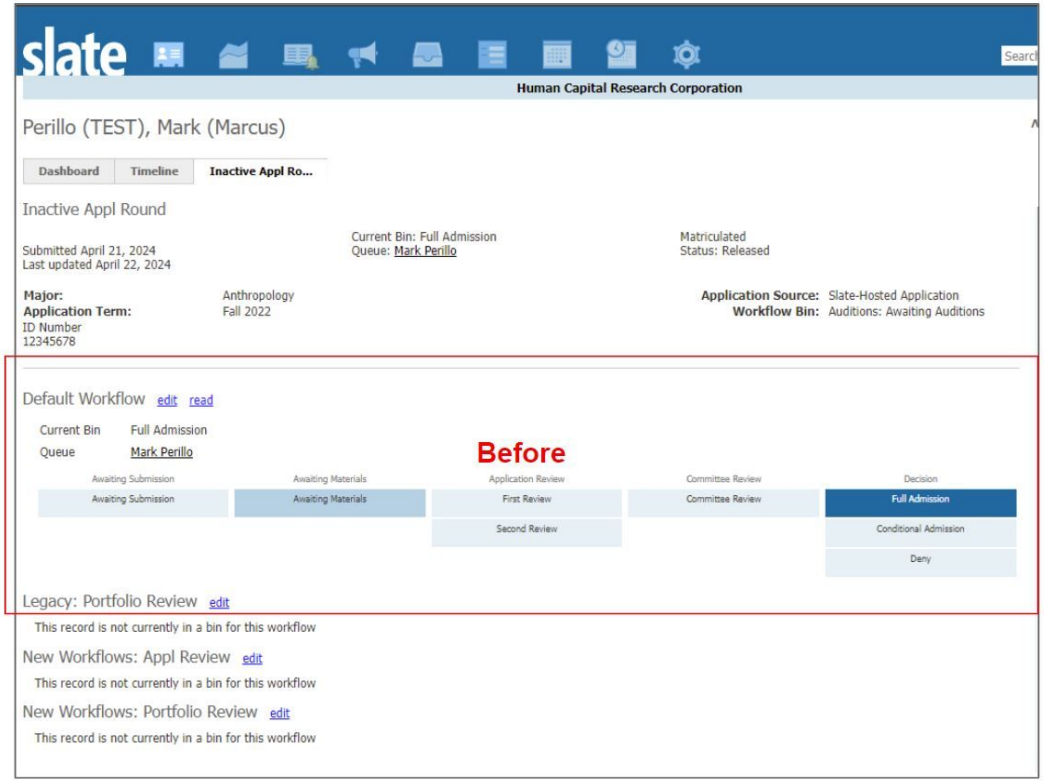
Hide the Default Workflow: Visual Bin Diagram



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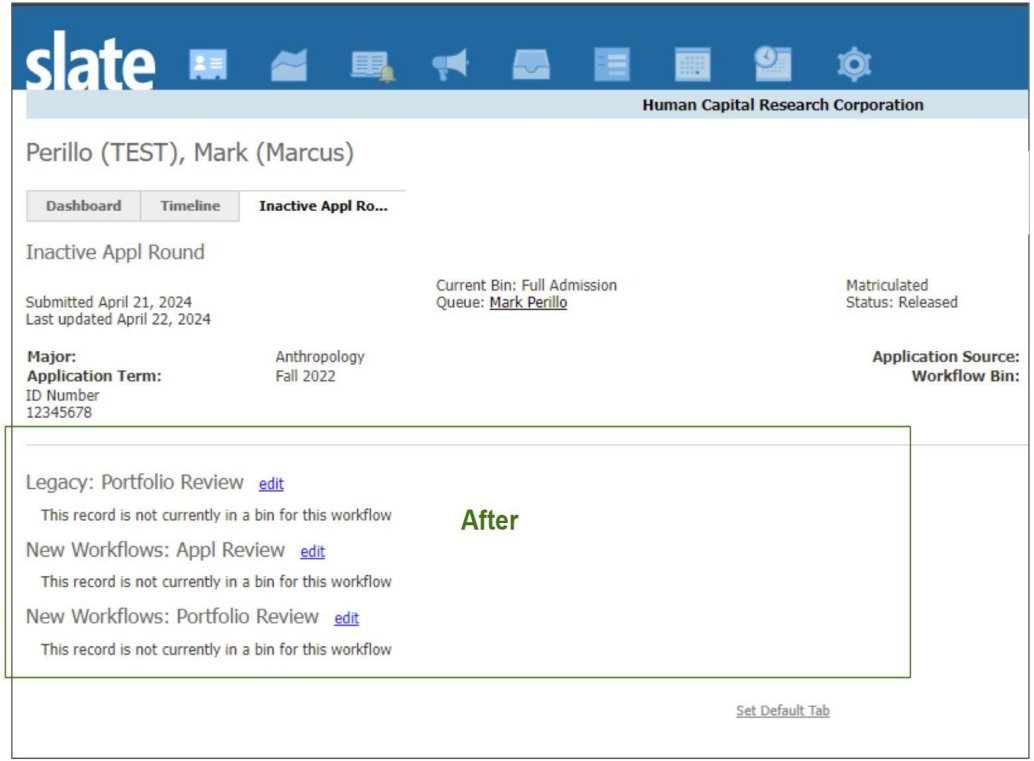
Hide the Default Workflow: Visual Bin Diagram



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Tables in Legacy Reader vs. Workflow Editor

Legacy Reader	Workflow Editor
Application Reader Queue	Workflow Bin User Queue
Current Bin	Workflow Bin
Bin History	Workflow Bin History
	Workflow Bin User History

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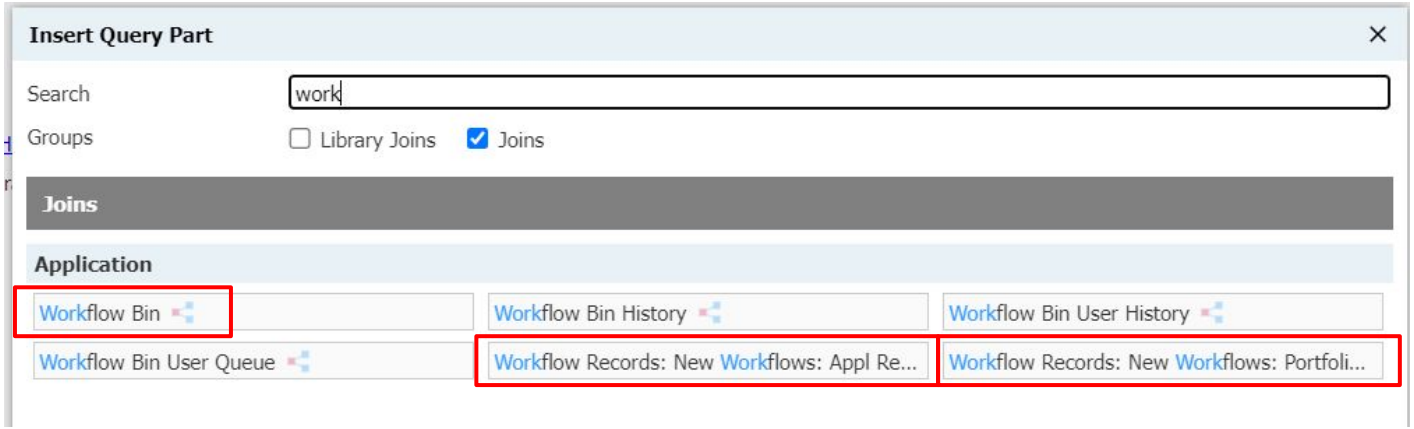
Joining to Workflow Bin vs a Specific Workflow



Joining from Application to Workflow Bin is a one-to-many join

Joining from Application to a specific workflow is a one-to-one join

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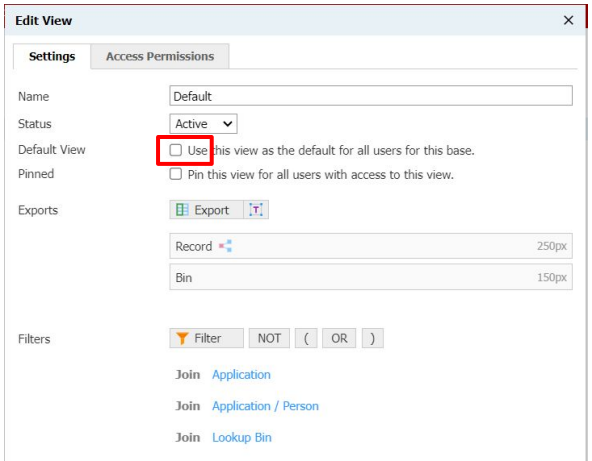
New Workflow Editor Best Practices / Tips

- If you build rules within the new Workflow Bin Automation tab, it will still show in the main Rules editor of Slate, and vice versa.
- Making sure you change to the correct Workflow when using queries for bin batch management - it defaults to Default Workflow, even if you've disabled it
- When you create a new workflow, it comes with a view *called* Default, but the Default View box isn't checked. Check it.
- Reader Portal Latency
- Troubleshooting Workflows



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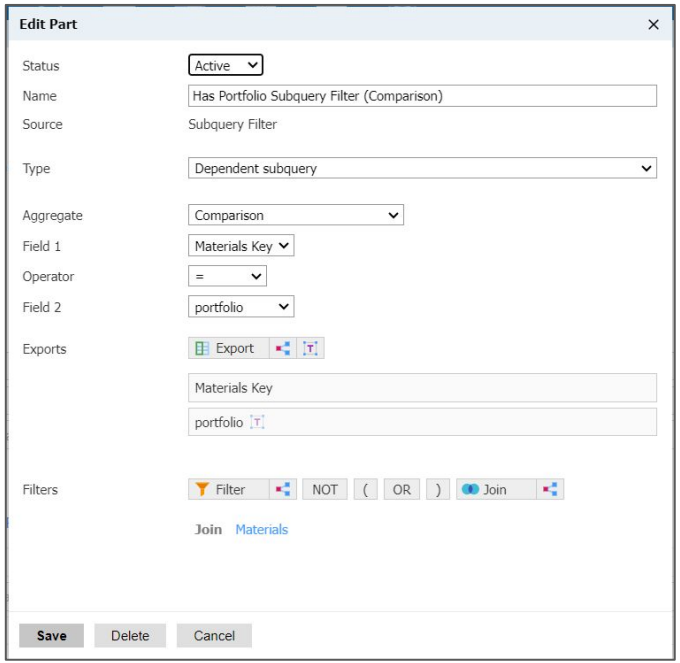
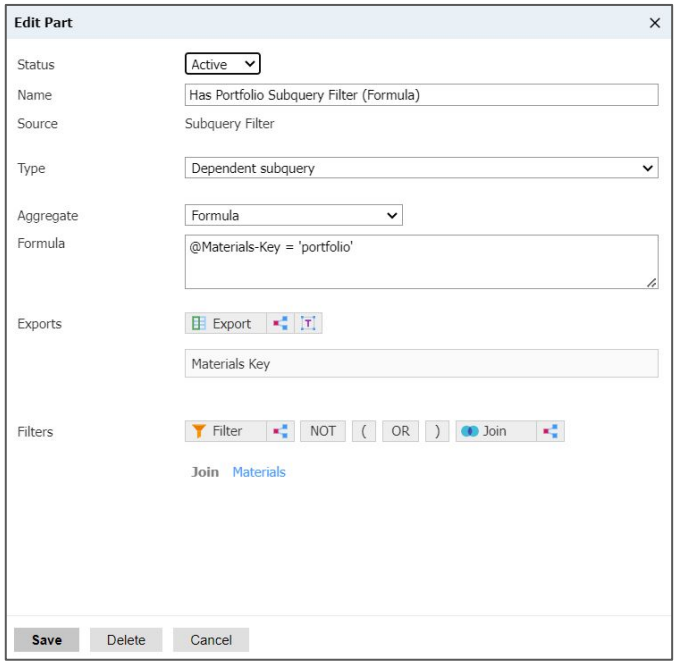
Querying on Portfolio in CJ

- How to query portfolio items using Configurable Joins (CJs)



or



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New Workflow Editor

HCRC Live Workflow Demonstration

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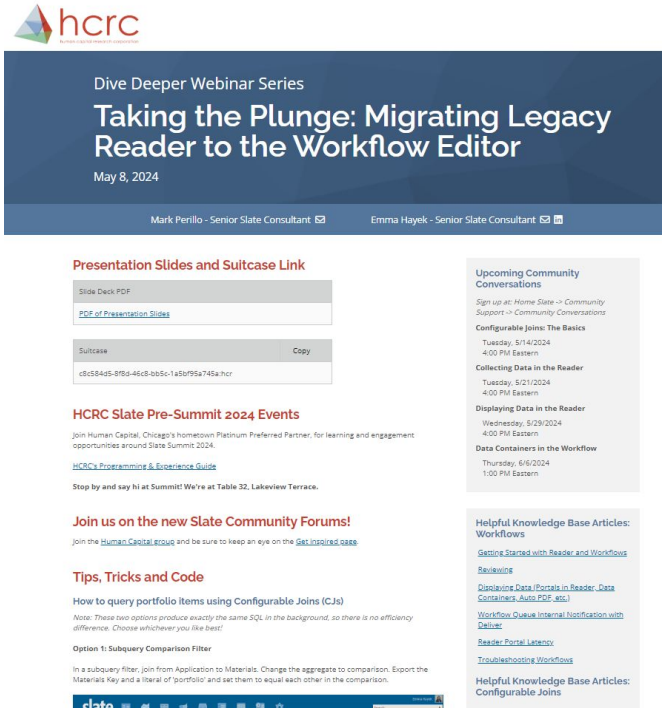
Presentation Resource Portal

engage.humancapital.com/portal/dive_deeper_may_2024



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Dive Deeper Webinar Series

Taking the Plunge: Migrating Legacy Reader to the Workflow Editor

May 8, 2024

Mark Perillo - Senior Slate Consultant Emma Hayek - Senior Slate Consultant

Presentation Slides and Suitcase Link

Slide Deck PDF

PDF of Presentation Slides

Suitcase Copy

c8c584d5-8f8d-46c8-bb5c-1a5bf95a745a:hcr

HCRC Slate Pre-Summit 2024 Events

Join Human Capital, Chicago's hometown Platinum Preferred Partner, for learning and engagement opportunities around Slate Summit 2024.

HCRC's Programming & Experience Guide

Stop by and say hi at Summit! We're at Table 32, Lakeview Terrace.

Join us on the new Slate Community Forums!

Join the Human Capital group and be sure to keep an eye on the Get inspired page.

Tips, Tricks and Code

How to query portfolio items using Configurable Joins (CJs)

Note: These two options produce exactly the same SQL in the background, so there is no efficiency difference. Choose whichever you like best!

Option 1: Subquery Comparison Filter

In a subquery filter, join from Application to Materials. Change the aggregate to comparison. Export the Materials Key and a literal of 'portfolio' and set them to equal each other in the comparison.

Upcoming Community Conversations

Sign up at: Home Slate -> Community Support -> Community Conversations

Configurable Joins: The Basics

Tuesday, 5/14/2024
4:00 PM Eastern

Collecting Data in the Reader

Tuesday, 5/21/2024
4:00 PM Eastern

Displaying Data in the Reader

Wednesday, 5/29/2024
4:00 PM Eastern

Data Containers in the Workflow

Thursday, 6/6/2024
1:00 PM Eastern

Helpful Knowledge Base Articles: Workflows

Getting Started with Reader and Workflows

Reviewing

Displaying Data (Portals in Reader, Data Containers, Auto PDF, etc.)

Workflow Queue Internal Notification with Deliver

Reader Portal Latency

Troubleshooting Workflows

Helpful Knowledge Base Articles: Configurable Joins

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Useful Knowledge Base (KB) Articles

- **Workflows**
  - Getting Started with Reader and Workflows
  - Displaying Data
  - Reviewing
- **Configurable Joins**
  - Transitioning to Configurable Joins
  - Slate Interactive Encore: Understanding Configurable Joins and How to Use Them (66 min video)
  - Commonly Used Person-Scoped Exports and Filters
  - Commonly Used Application-Scoped Exports and Filters
- **Other Resources**
  - Adding a Mailing via Suitcase
  - Realms

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+1 Feedback Requests: Consider Upvoting

Copy Workflow

New material highlighting broken in new workflow tool

Search Functionality in New Workflow

Apply Logic to Next Reader Bin Options

Application Update - Permission Expansion

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Additional Resources

- HCRC Community Forum Group (Join Us!)

  https://community.technolutions.net/hcrc

- Technolutions Community Forum

  https://community.technolutions.net/

- Facebook: Super Slate Technolutions Friends

  https://www.facebook.com/groups/superslatefriends/

- Slack

  https://slate-users.slack.com/

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Upcoming Community Conversations

- **Collecting Data in the Reader**

  Tuesday, 5/21/2024
  4:00 PM Eastern

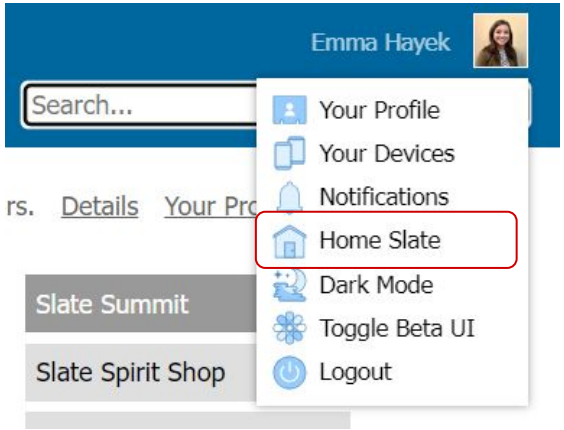
- **Displaying Data in the Reader**

  Wednesday, 5/29/2024
  4:00 PM Eastern

- **Data Containers in the Workflow**

  Thursday, 6/06/2024
  1:00 PM Eastern

Sign up at: Home Slate -> Community Support -> Community Conversations



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Questions

Pre-Submitted Questions

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Pre-Submitted Questions

Question:

“Why should schools that are successfully using the legacy Reader migrate to Workflow Editor? Is there any reason they shouldn't?”

“We have the most basic of bin workflows, so why redo it?”

“Why is workflow better than the reader?”

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Pre-Submitted Questions

Question:

“Best Practices for moving from Legacy Reader to Workflow”

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Pre-Submitted Questions

Question:

“I have a special bin movement rule that moves an application into a particular if a transcript material is received after the reader review form is submitted. STL has filters that specifically pick that. As I work on moving to the workflow, how would I rewrite this rule in CJs?”

Step-by-step explanation

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Pre-Submitted Questions

Question:

“Is it possible to download application PDFs as part of “workflow” processing? (Our departments need actual pdf files of their admitted applications once the season comes to its end.)”

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Pre-Submitted Questions

Question:

“How would you transition from using a custom query base in the legacy Reader, to the new Reader?”

“The biggest obstacle we have is that our graduate instances are also relying on departmental reader query bases to control departments' access to records so we need to add in populations and rebuilding permissions and queries when considering moving from the Legacy Reader to Workflows.”

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Pre-Submitted Questions

Question:

“How would you recommend transitioning department users from not having access to query directly from the Reader with the new workflow? This is one of the sticking points that has prevented us from moving forward with using the new Reader workflow despite desperately wanting to do so for all the additional functionality. With the addition that our users who are in the Reader have difficulty with querying currently after we've done significant trainings and narrowed down the export/filter list; Configurable Joins would be a whole other beast and difficult to manage with a small team of 1-2 people and thousands of users.”

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Additional Questions

Additional Questions?

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Presentation Resource Portal
https://engage.humancapital.com/portal/dive_deeper_may_2024

including presentation slides, suitcase link and screenshots

HCRC at Slate Innovation Summit (June 20-21, 2024)
Lakeview Terrace: Table 32

HCRC Pre-Summit In-Person Workshops and Reception (June 19-20, 2024)
https://engage.humancapital.com/portal/slate-summit-2024

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