

hcrc

human capital research corporation



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.

Taking the Plunge: Migrating Legacy Reader to the Workflow Editor

Overview



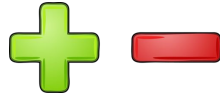
Intros



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!)



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)

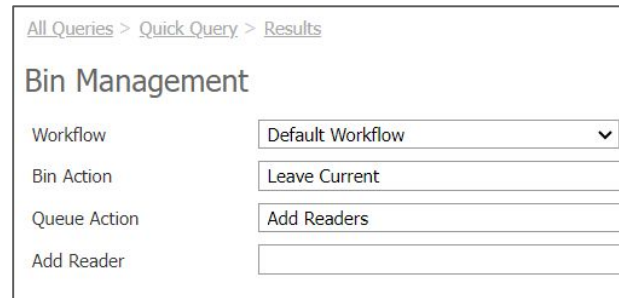
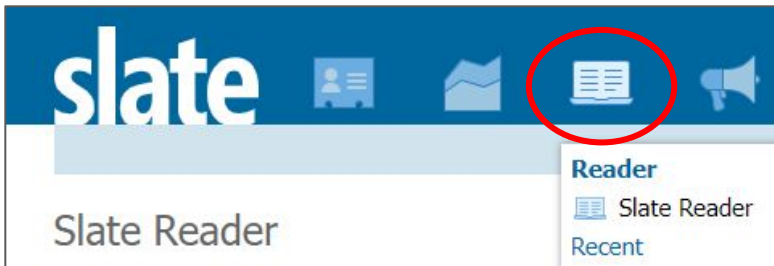
Providing three decades of service in customized research and analytics to colleges and universities, particularly in financial aid and pricing, enrollment management and planning, student recruitment and retention, market analysis and institutional benchmarking.



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





Comparison: Legacy Reader vs. Workflows

Database

Reader and Decisions

Decision Codes

Decision Reasons

Letter Templates

Merge Fields

Release Decisions

Workflows

Reader Bins (legacy tool)

Reader Review Forms (legacy tool)

Reader Tab Groups (legacy tool)

Reader Tab Materials (legacy tool)

Release Decisions (legacy tool)

Workflows (legacy tool)

vs.

Database

Reader and Decisions

Workflows

Workflows (legacy tool)

Reader vs. Workflow: User Experience



Slate Reader



Legacy Reader and Workflow

New* Workflows Tool
*(as of Fall 2021)



Reader vs. Workflow: User Experience

Legacy Reader

The Legacy Reader interface displays a dashboard for 'Application Review' with a grid of stages and counts:

Stage	Count
Awaiting Submission	0
Awaiting Materials	1
Application Review (First Review)	0
Committee Review	0
Decision (Full Admission)	0
Decision (Conditional Admission)	0
Decision (Deny)	0
Application Review (Second Review)	0

Additional features include a search bar, filter options (NOT, OR), and a tag 'IN Test Record'.

New Workflows

The New Workflows interface displays a dashboard for 'Application Review' with a grid of stages and counts, indicating new items:

Stage	Count
NEW: Awaiting Submission	0
NEW: Awaiting Materials	0
NEW: Application Review (First Review)	0
NEW: Committee Review	0
NEW: Decision (Full Admission)	0
NEW: Decision (Conditional Admission)	0
NEW: Decision (Deny)	0
NEW: Application Review (Second Review)	0

Additional features include a search bar and a menu icon for 'Example: Test Records'.



Reader vs. Workflow: User Experience

Legacy Reader

slate Applications (1) Build Query Classify Refresh -5 +5 Add to Queue (0)

Home	Ref	Name	Bin	Bin Entry Timestamp
Browse	887238775 <small>⚠ You have this file in your queue. 🔒 Mark Perillo 👤 Mark Perillo</small>	Perillo (TEST), Mark (Marcus)	Application Review - Awaiting Materials	04/28/2024 01:38 PM

Search...
Awaiting Materials - Awaiting Materials
Example: All Test Records
Filter NOT (OR)
Tag IN Test Record

New Workflows

slate New Workflows: Appl Review (2) Build Query Classify Refresh -5 +5 Add to Queue (0)

Home	Record	Gender	Birthdate	Address	Admit Term	Bin	Bin Timestamp
Browse	Perillo (TEST), Mark (Marcus) <small>⚠ You have this file in your queue. 🔒 Mark Perillo 👤 Mark Perillo</small>	M	01/01/1990	Chicago, IL	Fall 2024	NEW: Awaiting Materials	04/22/2024 05:07 PM
Search	Perillo (TEST), Mark (Marcus) <small>⚠ You have this file in your queue. 🔒 Mark Perillo</small>	M	01/01/1990	Chicago, IL	Fall 2025	NEW: Awaiting Materials	04/28/2024 01:29 PM

Search...
Awaiting Material - NEW: Awaiting Materials
Example: Test Records



Advantages: Workflow Views

- Customized views in a more user-friendly robust format

Prev Next

Search...

Awaiting Material - NEW: Awaiting Materials

Example: Test Records

Customize View

Reset View

Default

Example: Test Records

Example: Test SAI Records

This screenshot shows a dropdown menu for selecting a workflow view. The menu is open, showing several options. The option 'Example: Test Records' is highlighted with a blue box. A blue circle highlights a three-line menu icon to the right of the 'Example: Test Records' text.

slate

Edit View

Settings Access Permissions

Name Example: Test Records

Status Active

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

Record 250px

Gender

Birthdate

Address

Admit Term

Bin 150px

Bin Timestamp 150px

Filters

Filter NOT (OR) Join

Join Application

Join Application / Person

Join Person / Address by Rank Overall 1 Rank = 1

This screenshot shows the 'Edit View' configuration page in the slate system. The page is divided into two main sections: 'Settings' and 'Access Permissions'. The 'Settings' section includes fields for 'Name' (Example: Test Records), 'Status' (Active), 'Default View' (with a checkbox), and 'Pinned' (with a checked checkbox). Below these are 'Exports' and 'Filters' sections. The 'Exports' section shows a list of fields with their display widths: Record (250px), Gender, Birthdate, Address, Admit Term, Bin (150px), and Bin Timestamp (150px). The 'Filters' section shows a filter configuration with 'Filter', 'NOT', 'OR', and 'Join' options. The 'Access Permissions' section is currently empty.



Advantages: Centralized Management

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

Reader and Decisions

Decision Codes
Decision Reasons
Letter Templates
Merge Fields
Release Decisions

Workflows

Reader Bins (legacy tool)
Reader Review Forms (legacy tool)
Reader Tab Groups (legacy tool)
Reader Tab Materials (legacy tool)
Release Decisions (legacy tool)
Workflows (legacy tool)

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

[All Workflows](#) > Edit Workflow ▼

New Workflows: Appl Review

Status	Active
Base	Application
Custom Permission	Reader
Homepage Display	Reader Widget

Bins Bin & Queue Automations Reader Tabs Review Forms Views Reader Lookup

Tabs Inside Each Workflow



Advantages: Drag-n-Drop Bin Management

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

Edit Bins

Application Review



Awaiting Submission	Awaiting Material	Application Review	Committee Review	Decision	Column
NEW: Awaiting Submission	NEW: Awaiting Materials	NEW: First Review	NEW: Committee Review	NEW: Full Admission	Bin
		NEW: Second Review		NEW: Conditional Admission	
				NEW: Deny	

Slate (Human Capital Research Corporation)

maix2 /



Advantages: Flexible Permissions


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

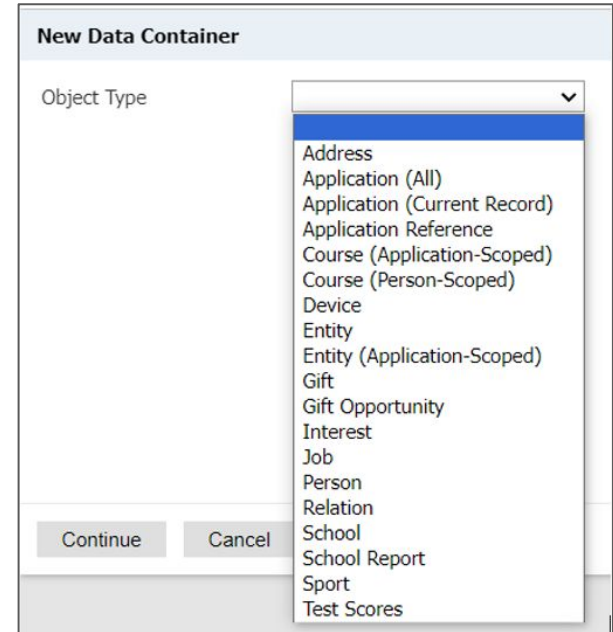
Edit Workflow Details

Status	<input type="text" value="Active"/>
Name	<input type="text" value="New Workflows: Appl Review"/>
Base	<input type="text" value="Application"/>
Short Description	<input type="text"/>
Realm	<input type="text"/>
Custom Read Permission	<input type="text" value="Reader"/>
Homepage Display	<input type="text" value="Reader Widget"/>



Advantages: Data Containers

- Data Containers 
 - 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>





Advantages: Edit the Reader Lookup Settings

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

Reader Lookup Settings Edit

PDF Download	Enabled
Review Forms	Display
Decisions	Display
Applications	Display record's other applications

Default Dashboard

Dashboard Merge Fields

Contact Information

```
{% if {{email}} %}{{email}}{% endif %}
{% if {{phone}} %}{{phone}} (daytime)
{% endif %}{% if {{business}} %} {{business}} (evening)
{% endif %}{% if {{mobile}} %} {{mobile}} (mobile)
{% endif %}Active Address
{{address}}
```

Biographical Details

```
{% if {{sex}} %}Sex: {{sex}}
{% endif %}{% if {{birthdate}} %}DOB: {{birthdate}} (Age {{age}})
{% endif %}{% if {{citizenshipstatus}} == 'PR' %}Permanent
Resident
{% endif %}{% if {{citizenship1}} %}Citizenship: {{citizenship1}}
{% endif %}{% if {{citizenship2}} %}Dual Citizen: {{citizenship2}}
{% endif %}
Application Details
Status: {{applicationstatus}}
{% if {{submitted}} %}Submitted: {{applicationsubmitted}}
{% endif %}
```

Edit Reader Lookup Settings

- Disable Lookup for All Bins
- Disable PDF Download
- Disable Review Forms
- Disable Decisions
- Disable Other Applications



Tip: Hide the Reader Lookup: Edit Bin/Queue

slate 887238775 Perillo (TEST), Mark (Marcus) First Year

[Lookup Record](#) [Show New Materials Report](#)
[Read in New Window](#) [Edit Bin/Queue](#)
[Download PDF](#)

Default Dashboard

Contact Information
perillom@humancapital.com
+1 773-555-1212 (mobile)

Biographical Details
Sex: M
DOB: January 1, 1990 (Age 34)
Citizenship: United States

Active Address
1060 W Addison St
Chicago, IL
United States

Application Details
Status:

Timestamp	Reader	Bin	Form
04/21 10:50 AM	Mark Perillo		Transcript Revi...

Application	Status	Submitted
Previous Cycle		04/21/2024
Second Year		10/19/2022

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*)



Tip: Hide the Reader Lookup: Edit Bin/Queue

```
<script>
```

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

```
</script>
```

887238775 Perillo (TEST), Mark (Marcus) | First Year

[Lookup Record](#) [Read in New Window](#) [Show New Materials Report](#) [Edit Bin/Queue](#) [Download PDF](#)

Before

Default Dashboard

Contact Information
perillom@humancapital.com
+1 773-555-1212 (mobile)

Active Address
1060 W Addison St
Chicago, IL
United States

Biographical Details
Sex: M
DOB: January 1, 1990 (Age 34)
Citizenship: United States

Application Details
Status:

Timestamp	Reader	Bin	Form
04/21 10:50 AM	Mark Perillo		Transcript Revi...

Application	Status	Submitted
Previous Cycle		04/21/2024
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887238775 Perillo (TEST), Mark (Marcus) | First Year

[Lookup Record](#) [Read in New Window](#) [Show New Materials Report](#) [Download PDF](#)

After

Default Dashboard

Contact Information
perillom@humancapital.com
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Active Address
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Status:

Timestamp	Reader	Bin	Form
04/21 10:50 AM	Mark Perillo		Transcript Revi...

Application	Status	Submitted
Previous Cycle		04/21/2024
Second Year		10/19/2022



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



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](#))



When to Take the Plunge?

Start building now!



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)





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



Reduce, Reuse, Recycle

Objects from the legacy Reader can be reused in Workflows:

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



How to Say Goodbye to Default Reader

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

The screenshot shows the 'Edit Record in Query Bases (legacy tool)' form in the Slate application. The form includes the following fields:

Field	Value
ID	
Status	Active
Folder	
Order	2
Name	Applications
Key	a.[id]
Enable Lookup	No
Enable Query	Yes
Enable Reader	No
Enable Folio	No

The 'Enable Reader' field is highlighted with a red box. The left sidebar shows a navigation menu with 'Applications' selected.

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).



How to Say Goodbye to Default Reader



slate  Mark Perillo

Search... 

Human Capital Research Corporation

Slate Reader

Reader  2	Workflow	New Workflows: Appl Review  1	New Workflows: Portfolio Review
Applications	Legacy: Portfolio Review	Application	Application

Before



How to Say Goodbye to Default Reader



Slate Reader

Workflow	New Workflows: Appl Review 🔔 1	New Workflows: Portfolio Review
Legacy: Portfolio Review	Application	Application

After



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.

Bin Management

Workflow	Default Workflow ▼
Bin Action	Leave Current
Queue Action	Add Readers
Add Reader	

Update Selected (0) Update All (93)



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>
```



Hide the Default Workflow: Dashboard Details

slate Human Capital Research Corporation

Perillo (TEST), Mark (Marcus)

Dashboard Timeline **Inactive Appl Ro...**

Inactive Appl Round

Submitted April 21, 2024
Last updated April 22, 2024

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Matriculated
Status: Released

Major: Anthropology
Application Term: Fall 2025
ID Number: 12345678

Application Source: Slate-Hosted Application
Workflow Bin: Auditions: Awaiting Auditions

Before

Default Workflow [edit](#) [read](#)

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Awaiting Submission Awaiting Materials Application Review Committee Review Decision

Awaiting Submission Awaiting Materials First Review Committee Review Full Admission

Second Review Conditional Admission

Deny



Hide the Default Workflow: Dashboard Details

The screenshot shows the Slate application interface for Human Capital Research Corporation. The top navigation bar includes the 'slate' logo, a search bar, and various utility icons. The main content area displays the user 'Perillo (TEST), Mark (Marcus)' with a status message: 'Rule execution successfully queued 3m ago. [Preview pending actions](#)'. Below this are tabs for 'Dashboard', 'Timeline', and 'Inactive Appl Ro...'. The 'Inactive Appl Round' section shows details for an application in Anthropology, Fall 2025, with ID 12345678. The application source is 'Slate-Hosted Application' and the workflow bin is 'Auditions: Awaiting Auditions'. A large green 'After' label is centered in this section. Below, the 'Default Workflow' section shows a flowchart with steps: 'Awaiting Submission', 'Awaiting Materials', 'Application Review' (subdivided into 'First Review' and 'Second Review'), 'Committee Review', and 'Decision' (subdivided into 'Full Admission', 'Conditional Admission', and 'Deny'). The 'Full Admission' step is highlighted in dark blue.

Human Capital Research Corporation

Perillo (TEST), Mark (Marcus) Rule execution successfully queued 3m ago. [Preview pending actions](#)

Dashboard Timeline **Inactive Appl Ro...**

Inactive Appl Round

Major: Anthropology **Application Source:** Slate-Hosted Application
Application Term: Fall 2025 **Workflow Bin:** Auditions: Awaiting Auditions
ID Number: 12345678

After

Default Workflow [edit](#) [read](#)

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Awaiting Submission	Awaiting Materials	Application Review	Committee Review	Decision
Awaiting Submission	Awaiting Materials	First Review	Committee Review	Full Admission
		Second Review		Conditional Admission
				Deny



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>
```



Hide the Default Workflow: Visual Bin Diagram

slate Human Capital Research Corporation

Perillo (TEST), Mark (Marcus)

Dashboard Timeline **Inactive Appl Ro...**

Inactive Appl Round

Submitted April 21, 2024
Last updated April 22, 2024

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Matriculated
Status: Released

Major: Anthropology
Application Term: Fall 2022

Application Source: Slate-Hosted Application
Workflow Bin: Auditions: Awaiting Auditions

ID Number: 12345678

Default Workflow [edit](#) [read](#)

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Before

```
graph LR; A[Awaiting Submission] --> B[Awaiting Materials]; B --> C[Application Review]; C --> D[Committee Review]; D --> E[Decision]; C --> E; subgraph Application_Review [Application Review]; direction TB; C1[First Review]; C2[Second Review]; end; subgraph Decision; direction TB; E1[Full Admission]; E2[Conditional Admission]; E3[Deny]; end;
```

Legacy: Portfolio Review [edit](#)

This record is not currently in a bin for this workflow

New Workflows: Appl Review [edit](#)

This record is not currently in a bin for this workflow

New Workflows: Portfolio Review [edit](#)

This record is not currently in a bin for this workflow



Hide the Default Workflow: Visual Bin Diagram

slate

Human Capital Research Corporation

Perillo (TEST), Mark (Marcus)

Dashboard Timeline **Inactive Appl Ro...**

Inactive Appl Round

Submitted April 21, 2024
Last updated April 22, 2024

Major: Anthropology
Application Term: Fall 2022

Current Bin: Full Admission
Queue: [Mark Perillo](#)

Matriculated
Status: Released

Application Source:
Workflow Bin:

Legacy: Portfolio Review [edit](#)

This record is not currently in a bin for this workflow

New Workflows: Appl Review [edit](#)

This record is not currently in a bin for this workflow

New Workflows: Portfolio Review [edit](#)







This record is not currently in a bin for this workflow

After

[Set Default Tab](#)

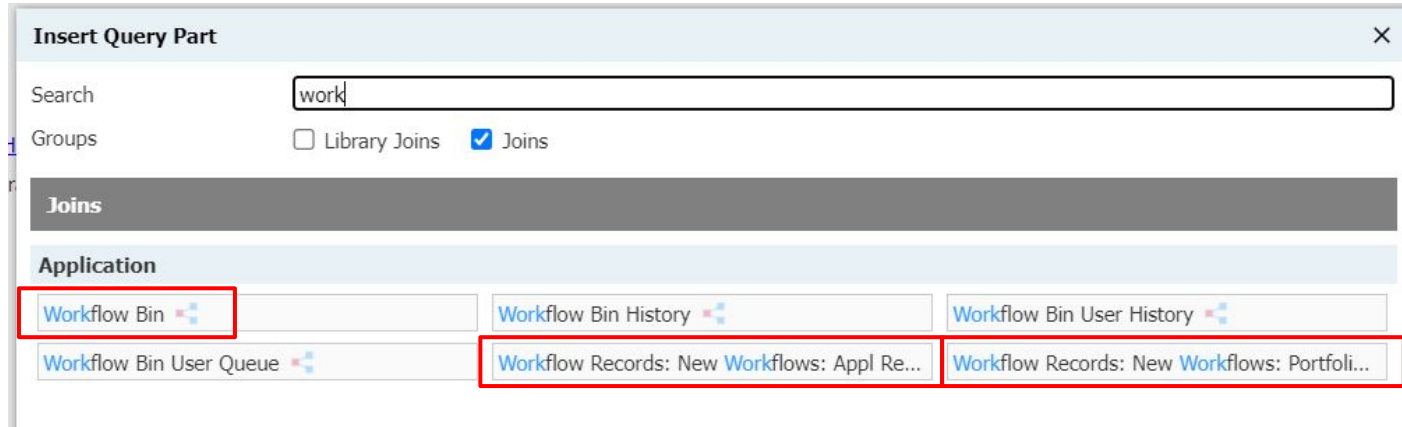


Tables in Legacy Reader vs. Workflow Editor

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



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



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](#)

Edit View [X]

Settings | Access Permissions

Name: Default

Status: Active

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: [Export] [Print]

Record: 250px

Bin: 150px

Filters: [Filter] [NOT] [OR] [AND]

Join: Application

Join: Application / Person

Join: Lookup Bin



Querying on Portfolio in CJ

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

Edit Part [Close]

Status: Active [v]

Name: Has Portfolio Subquery Filter (Comparison)

Source: Subquery Filter

Type: Dependent subquery [v]

Aggregate: Comparison [v]

Field 1: Materials Key [v]

Operator: = [v]

Field 2: portfolio [v]

Exports: [Export] [Filter] [Join]

Materials Key

portfolio [Filter]

Filters: [Filter] [NOT] [(] [OR] [)] [Join]

Join: Materials

[Save] [Delete] [Cancel]

or

Edit Part [Close]

Status: Active [v]

Name: Has Portfolio Subquery Filter (Formula)

Source: Subquery Filter

Type: Dependent subquery [v]

Aggregate: Formula [v]

Formula: @Materials-Key = 'portfolio'

Exports: [Export] [Filter] [Join]

Materials Key

Filters: [Filter] [NOT] [(] [OR] [)] [Join]

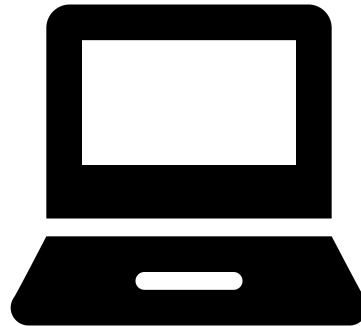
Join: Materials

[Save] [Delete] [Cancel]



New Workflow Editor

[HCRC Live Workflow Demonstration](#)





Presentation Resource Portal

engage.humancapital.com/portal/dive_deeper_may_2024



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
c8c94d5-8f6d-46c8-b65c-1a8b95a745a-hcr	

HCRC Slate Pre-Summit 2024 Events

Join Human Capital, Chicago's hometown Platinum Preferred Partner, for learning and engagement opportunities around State 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 [HumanCapital.slack.com](#) 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 State -> 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

[Getme Started with Reader and Workflows](#)

[Reviewing](#)

[Displaying Data \(Portals in Reader, Data Containers, Auto PDF, etc.\)](#)

[Workflow Queue Internal Notification with Detail](#)

[Reader Portal Latency](#)

[Troubleshooting Workflows](#)

Helpful Knowledge Base Articles: Configurable Joins





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](#)

+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



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/>



Upcoming Community Conversations

- **Collecting Data in the Reader**

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

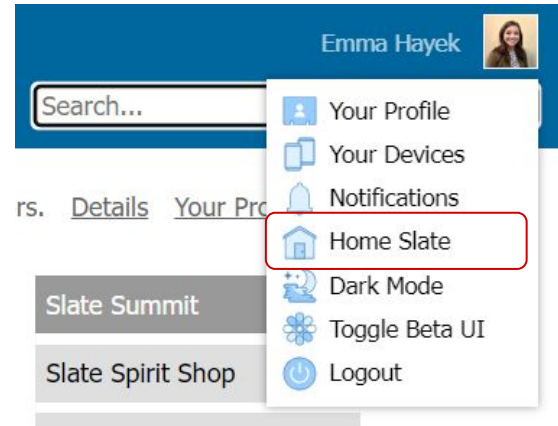
- **Displaying Data in the Reader**

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



? Questions

Pre-Submitted Questions

? 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?”

? Pre-Submitted Questions

Question:

“Best Practices for moving from Legacy Reader to Workflow”

? 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](#)

? 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.)”

? 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.”

? 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.”

? Additional Questions

Additional Questions?





Contact Information and More About HCRC

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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>

