Slate Documentation – Application Management

Questions? – ems@list.vanderbilt.edu

https://www.vanderbilt.edu/aapsi/documentation/slate.php

Basics

Workflow

The Slate application system is configured to be flexible to allow schools/departments to control their own workflow. Slate's basic workflow uses bins and queues.

Bin: A filing cabinet that stores an application. An application can only reside in one bin at any time.

Queue – A user's to-do list. While an application can only reside in one bin, it can be assigned to multiple queues at a time. Every Slate user has a queue.

Access to Applications in the Reader

In order to view applications through the reader, a user must have access to the population (based on school or program) of applications they want to view and to the bin the application currently resides on. You will not be able to see applications that have been added to your queue, unless you have the access mentioned above. If you are having problems viewing applications, contact your program/school administrator.

What Bins are Viewable

Which bins are viewable to a user depends on the role assigned to them.

Most users will have limited bin access as they are only evaluating applications and not managing the application workflow. Program, school and system administrators see a greater number/all bins in the system. For questions regarding bin access and making changes to the workflow, please contact ems@list.vanderbilt.edu.

To view the bins that you have access to, click on the "Browse" tab in the Reader.

Bin Automation

The Slate Reader only has a few automated bin movements. Please note, that these may not apply to all instances of Slate.

- When an application is started by the applicant, it will appear in the **Awaiting Submission** bin.

- Once an applicant has submitted their application, the application will automatically move into the **Awaiting Payment** bin if the department or school charges an application fee.

- Once an applicant pays their application fee, their application will automatically move into the **Awaiting Materials** bin. If your department or school does not charge an application fee, then the application will bypass the **Awaiting Payment** bin and go into the **Awaiting Materials** bin.

- Finally, an application will leave the **Awaiting Materials** bin and enter the **Initial Evaluation** bin once the outstanding materials have been received. Normally, this would include a letter of recommendation or a test score. Once an application enters the Initial Evaluation bin, the application has all of its materials and is completely ready to be evaluated.

An application can be pulled out of one of these Incomplete Applications bins by a program manager. If a program manager does move an application out of one of the Incomplete Applications bins, the application will not automatically reenter one of bins. For example if an application is moved out of the **Awaiting Materials** bin into the **Evaluation bin** and an outstanding letter of recommendation is submitted, the application will not automatically move to the **Initial Evaluation** bin.

Note: Do **NOT** move an application from the Awaiting Submission bin. An applicant could decide to change their program before they submit their application, which would remove them from what you can access in your bins.
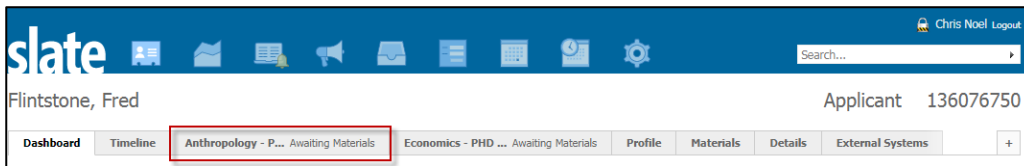
Individual Assignments

Individual bin/reader assignments can be accomplished through the **Workflow** link on the administrative side of Slate.
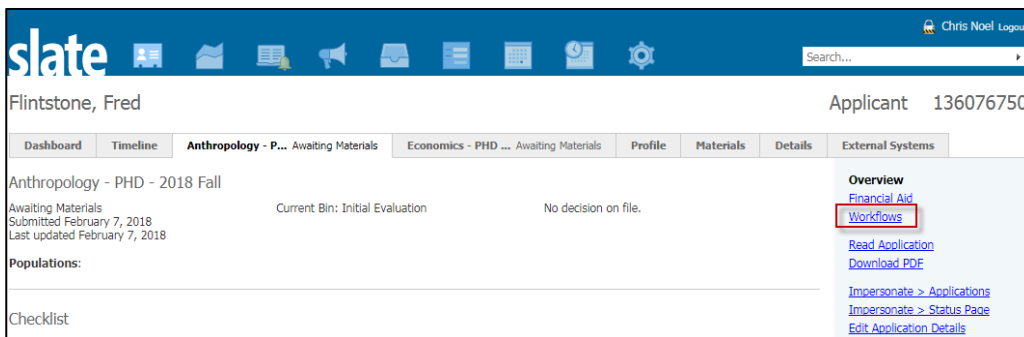
1. Lookup the applicant using the quick search or the Lookup Records tool in Slate.
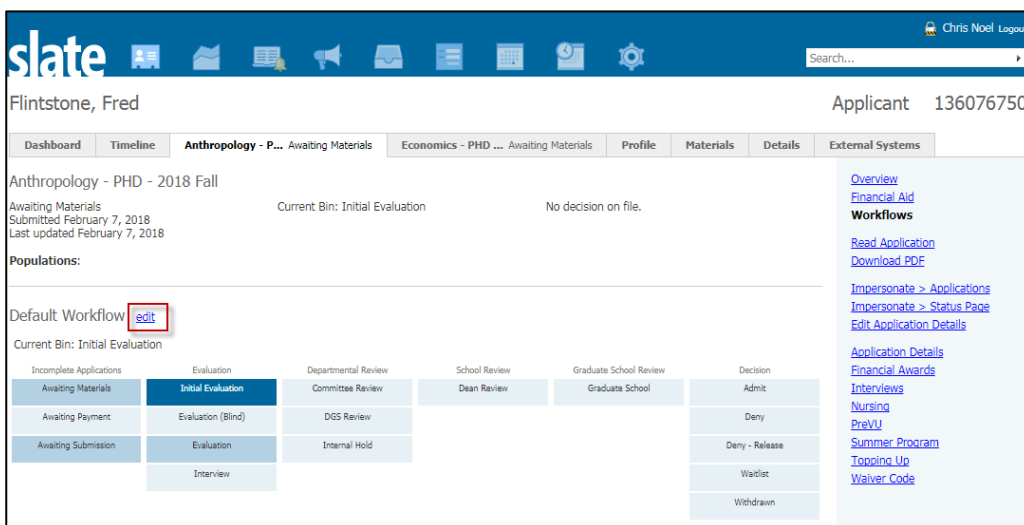

2. Locate the relevant application to move to another bin or assign evaluators to.

3. Click on **Workflows** in the menu on the right.

4. Next to the Default Workflow click **edit**.

5. In the Edit Workflow Bin window:

    a. To edit the bin – click on the Bin dropdown and select the new bin.

To add an evaluator(s) – click in the Add Reader box and start typing an evaluator's name and select the evaluator once you see them. You can add additional evaluators by repeating this process.

The total list of evaluators will show next to the Queues heading. Click **Save** when you want to apply your changes.

You will see the application reflect this new information. Sometimes you have to refresh your page (F5) to see the changes reflected immediately.

Batch Assignments

Batch assignments can be accomplished using the Query tool and the Bin Management output option.

1. Access the query tool.

2. Create a new query or select an existing query.

3. Use exports & filters to narrow down the results until you get the group of applications you want to manage. Your instance of Slate may have prebuilt queries that have been created to help you find these common groups of applications. Click here for more information.

4. Run the query to see the results.

5. In the Output dropdown select **Bin** under the **Batch Management** section.
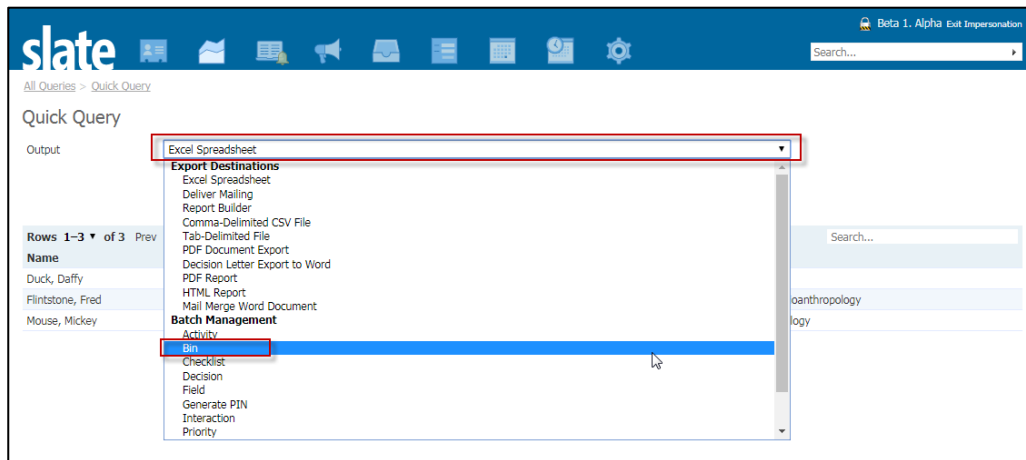
6. In the bin management screen, you have a number of options:
   a. **Bin Action** – select "Set Bin" to move the applications to another bin. If you only want to add readers keep the default "Leave Current Bin".
   b. **Bin** – select the bin you wish to move the applications into.
   c. **Queue Action** – you can select whether you want to "Add Readers" or "Clear Readers". If you just want to change bins and not add readers, then leave Add Readers as the option.
   d. **Add Readers** - start typing an evaluator's name and select the evaluator once you see them. You can add additional evaluators by repeating this process. The list of users will proliferate underneath the Add Reader option.
   e. **Check boxes next to applications** – you can individually select which applicants you want to move or assign readers to. Click the box first box to select/deselect all.
   f. **Update Selected** – this will update all of applicants with checkboxes checked next to them.
   g. **Update All** – this will update all applicants in the query
   h. The Bin Management: Bin and Bin Management: Readers columns in the query will update as you make changes. This way you can see what changes you have made.
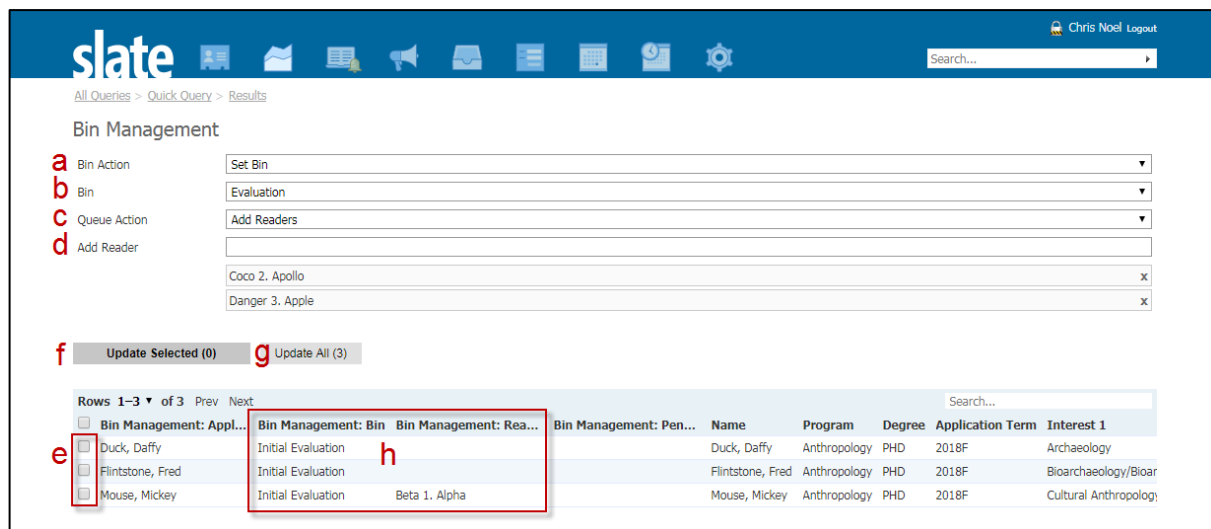
Prebuilt Queries

In certain instances of Slate, we have created some general queries for all departments to use. Please contact ems@list.vanderbilt.edu if you have specific questions regarding these. These queries can be accessed by doing the following:

1. Access the query tool.

2. Click on the link to **Include shared queries**.
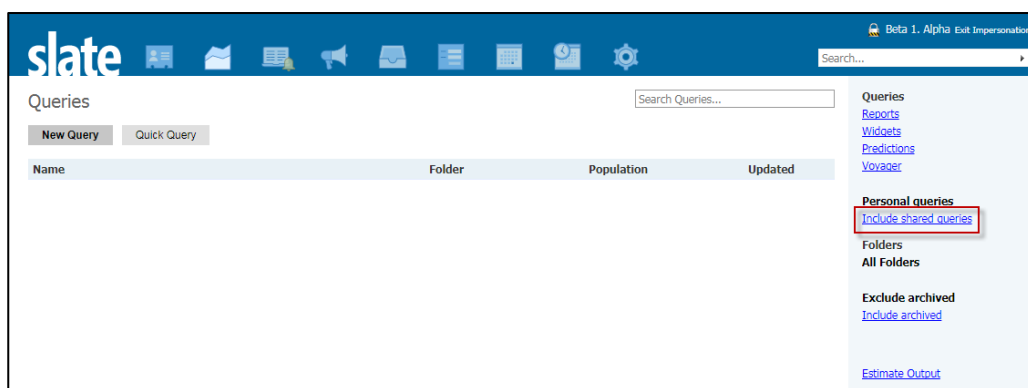
3. Select the **Queries for programs** folder.
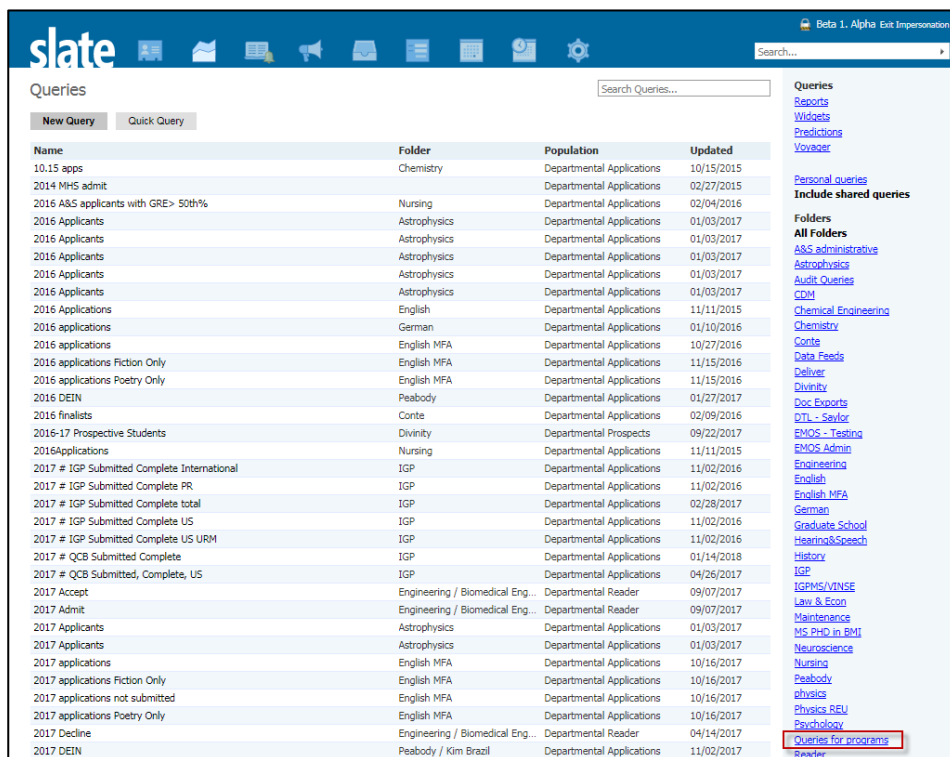
4. The workflow queries available will include the bin in the Name of the query. Click on the appropriate query.

5. Click on the **Run Query** button to run the query. People will not have access to edit these queries.

6. Follow steps 5 & 6 in the previous section in order manage your bin and/or readers.