

Slate Documentation – Application Management



VANDERBILT
UNIVERSITY

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

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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.

slate	Browse			
Home	Incomplete Applications	Evaluation	Departmental Review	Decision
Browse	Awaiting Materials 2	Initial Evaluation 48	Committee Review 0	Admit 0
Search				
Queue				
Recent				
Share				
Classify				
Help				
Exit				
	Awaiting Payment 0	Evaluation (Blind) 0	DGS Review 0	Deny 0
	Awaiting Submission 25	Evaluation 2	Internal Hold 0	Deny - Release 0
		Interview 0		Waitlist 0
				Withdrawn 1

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.

slate	Browse		
Home	Incomplete Applications	Evaluation	Departmental Review
Browse	Awaiting Materials 2	Initial Evaluation 48	Committee Review 0
Search	Awaiting Payment 0	Evaluation (Blind) 0	DGS Review 0
Queue	Awaiting Submission 25	Evaluation 2	Internal Hold 0
Recent		Interview 0	
Share			
Classify			
Help			
Exit			

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.

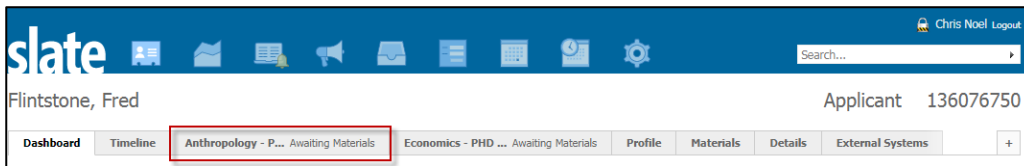
Individual Assignments

Individual bin/reader assignments can be accomplished through the **Workflow** link on the administrative side of Slate.

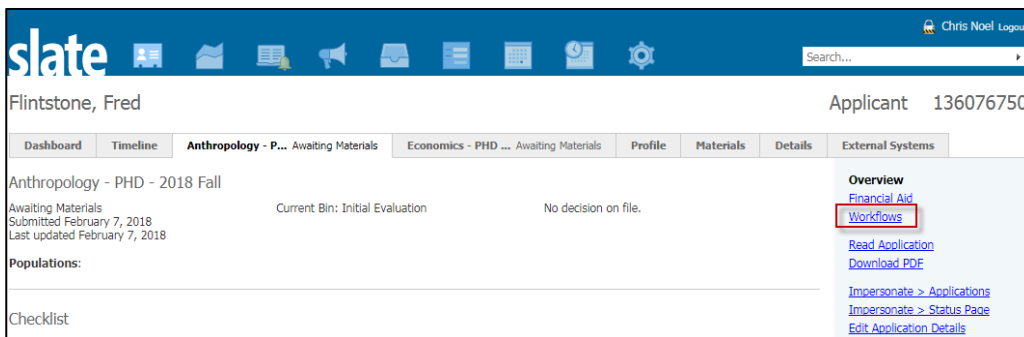
1. Lookup the applicant using the quick search or the Lookup Records tool in Slate.



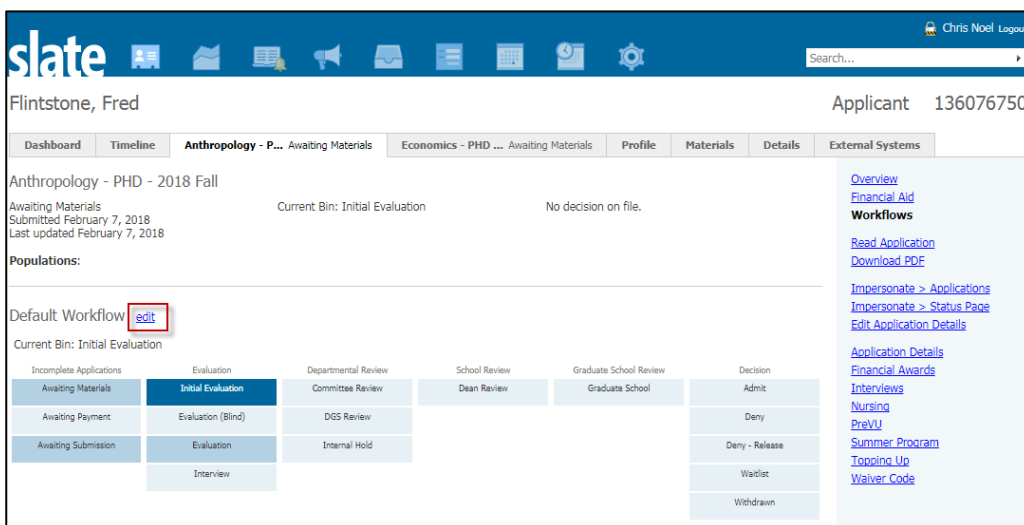
2. Locate the relevant application to move to another bin or assign evaluators to.



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.

Edit Workflow Bin

Bin: Evaluation - Initial Evaluation ▼

Pending Bin: ▼

Add Reader:

Queues:

Save Cancel

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.

Edit Workflow Bin

Bin: Evaluation - Initial Evaluation ▼

Pending Bin: ▼

Add Reader: Apollo Coco

Queues: Coco 2, Apollo
coco@vandy.com

Save Cancel

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

Bin

Evaluation - Evaluation

Pending Bin

Add Reader

Queues

Coco 2. Apollo

Danger 3. Apple

Save

Cancel

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

slate

Chris Noel Logout

Search...

Flintstone, Fred

Applicant 136076750

Dashboard

Timeline

Anthropology - P... Awaiting Materials

Economics - PHD ... Awaiting Materials

Profile

Materials

Details

External Systems

Anthropology - PHD - 2018 Fall

Awaiting Materials
Submitted February 7, 2018
Last updated February 7, 2018

Current Bin: Evaluation
Queue: **Coco 2. Apollo, Danger 3. Apple**

No decision on file.

Overview

Financial Aid

Workflows

Read Application

Download PDF

Impersonate > Applications

Impersonate > Status Page

Edit Application Details

Application Details

Financial Awards

Interviews

Nursing

PreVU

Summer Program

Topping Up

Waiver Code

Populations:

Default Workflow [edit](#)

Current Bin: Evaluation
Queue: **Coco 2. Apollo, Danger 3. Apple**

Incomplete Applications

Awaiting Materials

Awaiting Payment

Awaiting Submission

Evaluation

Initial Evaluation

Evaluation (Blind)

Evaluation

Interview

Departmental Review

Committee Review

DGS Review

Internal Hold

School Review

Dean Review

Graduate School Review

Graduate School

Decision

Admit

Deny

Deny - Release

Waitlist

Withdrawn

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.

Quick Query

User [Beta 1, Alpha](#)

Population Departmental Applications

Run Query

Preview Results

Display SQL

Save Copy

Exports

Name

Program

Degree

Application Term

Interest 1

Export

Literal

Existence

Filters Matching Rows: 3

Bin IN Initial Evaluation

Tag IN Test Account

Filter

OR

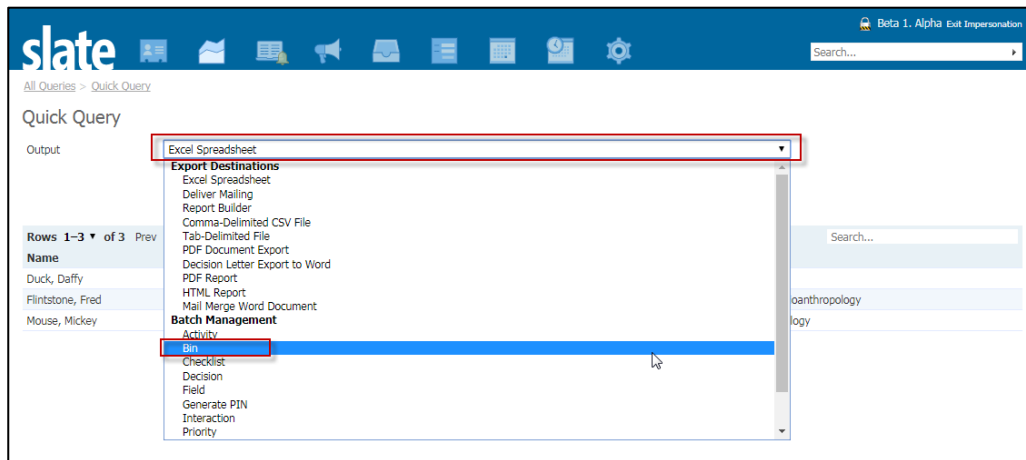
NOT

(

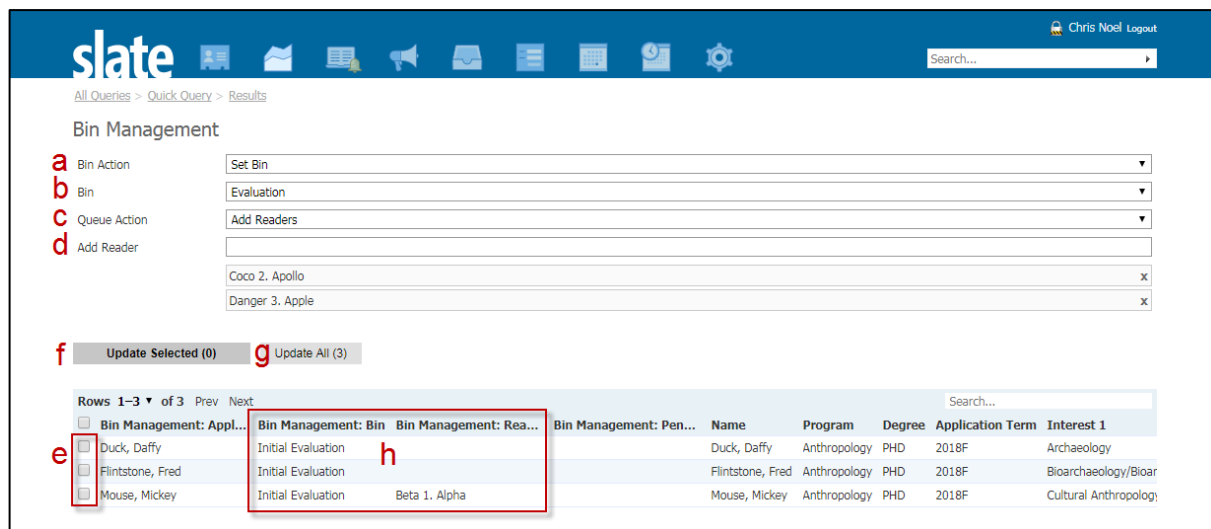
)

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.



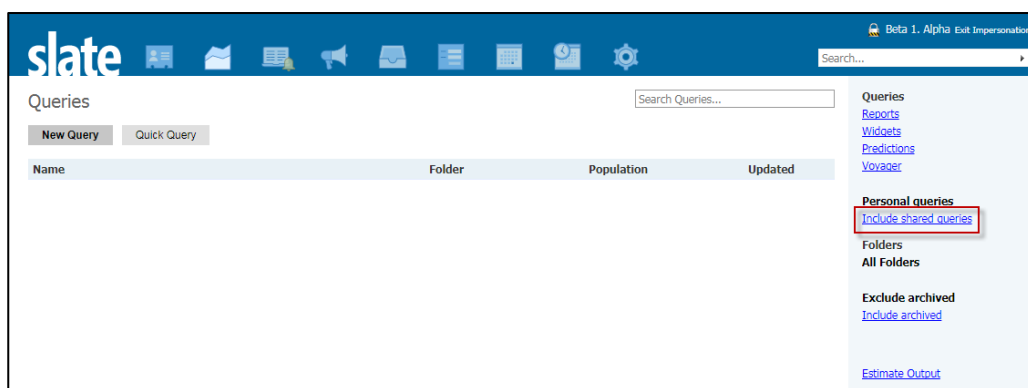
Prebuilt Queries

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:

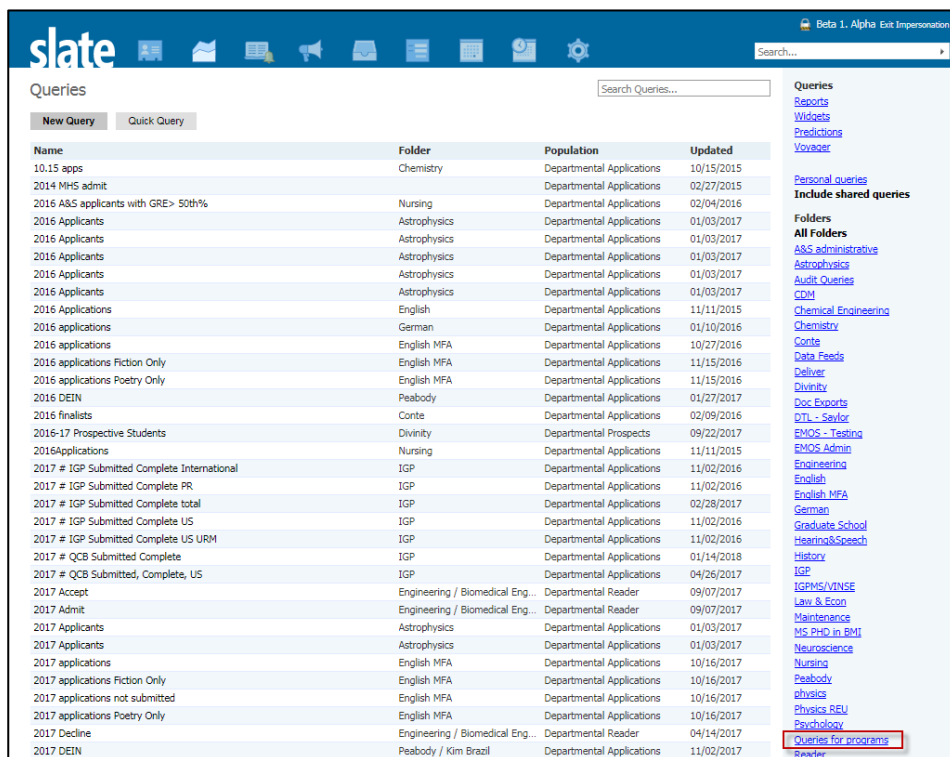
1. Access the query tool.



2. Click on the link to **Include shared queries**.



3. Select the **Queries for programs** folder.



- The workflow queries available will include the bin in the Name of the query. Click on the appropriate query.

The screenshot shows the 'Queries' section of the Slate application. A table lists various queries with columns for Name, Folder, Population, and Updated. A red box highlights a group of queries related to 'Current Applications in the Initial Evaluation Bin'.

Name	Folder	Population	Updated
Current Applications - Accepted Offer of Admission	Queries for programs	Departmental Applications	11/07/2017
Current Applications - Admitted	Queries for programs	Departmental Applications	11/07/2017
Current Applications - All Submitted Applications	Queries for programs	Departmental Applications	02/05/2018
Current Applications - Declined Offer of Admission	Queries for programs	Departmental Applications	11/07/2017
Current Applications - Deny	Queries for programs	Departmental Applications	11/07/2017
Current Applications in the Awaiting Materials Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Awaiting Payment Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Awaiting Submission Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Committee Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Dean Review Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the DGS Review Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Evaluation Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Graduate School Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Initial Evaluation Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Internal Hold Bin	Queries for programs	Departmental Applications	02/05/2018
Current Applications in the Interview Bin	Queries for programs	Departmental Applications	02/05/2018
Discretionary Waivers	Queries for programs	Departmental Applications	08/31/2017
Previous Applications 2014-2015 - Accepted Offer of Admission	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2014-2015 - Admitted	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2014-2015 - Declined Offer of Admission	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2014-2015 - Deny	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2015-2016 - Accepted Offer of Admission	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2015-2016 - Admitted	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2015-2016 - Declined Offer of Admission	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2015-2016 - Deny	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2016-2017 - Accepted Offer of Admission	Queries for programs	Departmental Applications	12/12/2017
Previous Applications 2016-2017 - Admitted	Queries for programs	Departmental Applications	12/12/2017

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

The screenshot shows the details of a query named 'Current Applications in the Initial Evaluation Bin'. The 'Run Query' button is highlighted with a red box.

Folder	Queries for programs	
User	EMOS User	
Population	Departmental Applications	
Execution Mode	Retrieve all records each time query is run	
Filters	Current Application Period IN Current	
	Bin IN Initial Evaluation	
	Tag NOT IN Test Account	
Matching Rows	47	

Run Query

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