Table of Contents

The Reader..........................................................................................................................2
Navigating the Reader.........................................................................................................3
Overview of Bins and Bin Structure................................................................................3
Filtering within the Reader...............................................................................................4
Bin movement....................................................................................................................8
Reviewing or “Taking Action” on an Application.............................................................8
Moving Multiple Applications into Queues and Bins.......................................................9
Overview of Review Forms.............................................................................................12
  Waive Dept Exam Form....................................................................................................13
  GSC Review Form...........................................................................................................14
  DGP Review Form..........................................................................................................15
  Dept Reader (Faculty) Review Form................................................................................16
Post Decision Workflow.....................................................................................................17

Reader Keyboard Shortcuts

- Arrow Keys: move up/down/left/right
- Pg Up/Pg Down: page up, page down
- +/-: zoom in, zoom out
- Tab: next section in index
- Shift + Tab: previous section in index
- 1-9: display 1st tab, 2nd tab, etc. in index
- Ctrl + Left/Right Arrow: rotate page (PC)
- Cmd + Left/Right Arrow: rotate page (Mac)
- Shift + H: toggle highlight remover
- H: toggle highlighter
- N: toggle note editor
- Q: toggle display of queue
- R: toggle display of Review Form / Send to Bin
- S: toggle display of search
- Esc: close open panels, return to first section

Reader Mouse Shortcuts

- Click tabs in the left panel to change sections
- Double-click on a page to zoom in
- Right-click on a page to zoom out
- Click-and-drag to move within/between pages
The Reader

Although applicant look-up and certain materials (test scores, essays, transcripts, etc.) can be viewed through the Records icon, the application review process will occur in the Slate Reader.

The Slate Reader can be accessed by clicking on the navigation bar’s third icon.

To perform an initial review of an application, click on “Departmental Reader.” The “Workflow: Post Decision” link is for applications that have already been reviewed. This will be explained later in the document.
Navigating the Reader

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>The default Reader landing page.</td>
</tr>
<tr>
<td>Browse</td>
<td>View all Reader Bins, including the total # of applications in each bin.</td>
</tr>
<tr>
<td>Search</td>
<td>View applications in a list view and add filters to narrow results.</td>
</tr>
<tr>
<td>Queue</td>
<td>View only applications that are currently in your queue.</td>
</tr>
<tr>
<td>Recent</td>
<td>View a list of only the most recently viewed applications.</td>
</tr>
<tr>
<td>Share</td>
<td>Allows the leader of a reading meeting to broadcast their screen to all other viewers in the meeting.</td>
</tr>
<tr>
<td>Help</td>
<td>Access helpful Reader resources, like documentation and webinars.</td>
</tr>
<tr>
<td>Exit</td>
<td>Exit the Reader and return to the student record view.</td>
</tr>
</tbody>
</table>

*Your most used menu tabs will be Browse, Search and Queue.

Overview of Bins and Bin Structure

By clicking on Browse, you open an overview of all the bins accessible to you – it is the easiest way to visualize where your program’s applications fall in the review process. The bottom-right corner of each bin displays the number of applications it currently holds.

Number of applications currently in the 1 Dept Review Bin.
Applications in the Awaiting Materials Bin, in the Pre-Review column, are applications that have been submitted, had their application fee paid, and are waiting on required, supporting materials to be received by the Graduate School. These items are most commonly official test scores and recommendation letters. Once all outstanding materials are in, applications in the Awaiting Materials Bin will automatically move into the 1 Dept Review Bin.

**Best Practice: This should be kept in mind when determining how your department wants to utilize the four Department Review Bins. Once applications are in the “Program Review” column of bins, all movements are customizable and may be tailored to your department’s needs.**

If your program is strict about not review applications until all materials are in, you can essentially disregard the Awaiting Materials bin, as *all* submitted applications with *all* supporting documents will move automatically into the 1 Dept Review Bin. However, if you have an application in the Awaiting Materials bin that you are willing to review before all materials have been received, you can manually move it into the 1 Dept Review Bin. **You can also waive an applicant’s entrance exam from Awaiting Materials Bin. Instructions for this waiver can be found on page 13 of this manual.**

Once your applications are in the 1 Dept Review Bin, your program or department can decide how the four review bins will be utilized for your review process. There are several different approaches you can take when setting up bin structure, and the Graduate School would be happy to talk through potential processes with your program. One thing to remember is that while all the bins in the Program Review column are yours to control and manage, the **names of each bin cannot be changed**, as their naming conventions are seen campus-wide.

**Filtering within the Reader**

To isolate particular types of applications, you can apply filters to a specific bin, your queue, or all applications, which can be viewed via the Search and Browse menu tabs. The Graduate School’s pre-programmed filters are always available via the drop-down menu on the right-hand side of the screen.
The “Default” filter will be initially set for all applications. The other pre-set filters are self-explanatory and fairly broad in use, or you may have had custom filters created for you by the Graduate School. **Please reach out if you’d like us to create custom reader filters.** However, if you want to sort your applications by more specific criteria – sex, citizenship, age, etc. – the filter tools are more useful.

For example, if you want to see how many applications belong to international female applicants, you can set the filter to sort on both “Citizenship Status” and “Sex.” This example shows only the “Sex” portion of this. **To start, click on “Filter” and type “Sex” into the Search bar within the “Insert Query Part” pop-up screen.**

**Best Practice:** You can add filters you frequently use to your Pinned Filters so they always appear at the top of the list. Click “Edit Pinned” to add the filter on the query page that will open, and the next time you open filter tool, the filters you added will show.
Follow the same steps to add any other filters. Each added filter will show on the right-hand side of the page.

In this example, we are filtering on female applicants, so “Female” is selected in the drop-down menu. Hit Save to apply the filter.

Once you find and select the desired filter, click “Continue.” You will then be prompted with the “Edit Filter” screen to specify which results you want to show.
Once the filter(s) are applied, you will see the number of applications decrease, meaning you are only looking at applications the filter is capturing.

Browse is the best view for a general overview of how many applications are being isolated by the filter in each individual bin.

If you are applying filters in Search, Queue or within a bin, you will see the number of applications decrease on the top of the screen.

After you select preset filters or add your own, you’ll see the numbers of applications in each bin change. Once you remove a filter, the number will return to the actual, total number for each bin.

To edit a filter, click the paper and pen icon.

To remove a filter, click the red “X”.

To edit a filter, click the paper and pen icon.
Bin Movement

Before moving applications from bin to bin, it’s best to understand the function of bin movement. As a general rule, **bin movement occurs from left to right and top to bottom, and does NOT go backwards**.

Moving applications from bin to bin can occur one by one or many at a time. Later in this document, we will explain the situations in which mass-moving applications will be useful. It can be more efficient to move multiple applications at once, but typically, you won’t move an application to the next bin until you have reviewed the application and completed the review form. Sending an application to the next Department Review Bin is, in effect, handing it off to the next reader in your program’s review process – this is also something to keep in mind when configuring the bins in your Program Review column.

Reviewing or “Taking Action” on an Application

To review or move an application, you first need to add the application to your queue. Applications can only be in one bin at a time, but can be in multiple reader’s queues at the same time. If you and a colleague are both reading an application, it will appear in both of your queues, but will remain in the same bin. **Best Practice: Don’t add an application to your queue until you know you are ready to fill out a review form or move it to another bin.**

The images below demonstrate how to add applications to your queue. When you click on a bin that is holding applications, you will see a list of the applications currently in that bin. In the sample below, the “Pre-Review – Awaiting Materials” bin has two applications in it:

Tip: If you want to jump to other bins, you can do so by selecting their title in this drop-down menu.

To select an application to add to your queue, click anywhere on the application row. Selected rows will be highlighted in dark blue. In the top right corner, the number of selected applications is indicated in parenthesis on the “Add to Queue” button. When satisfied, click “Add to Queue.”
Once you click “Add to Queue,” the queue tab will automatically open, showing all applications currently in your queue. You can now open any application by clicking anywhere in its row. In the open application, you will see a thin gray bar at the very bottom of the screen. On the far right side of the gray bar, click “Review Form/Send to Bin” to open the form with the option to send to the next bin.

**Moving Multiple Applications into Queues and Bins**

Follow the steps outlined below to move many applications at one time into someone’s queue, or into a bin. Once you are in the bin that you are moving applications from, **click the “Build Query” button** in the top right corner.

A query will open with pre-generated criteria. These criteria, listed under “Exports,” are the same as the header fields shown in the “Search” and “Queue” screens. On this page, you only need to click the “Run Query” button at the top right.

The filter will be automatically be set to produce all applications from the bin you were previously in (the bin from which you select “Build Query”).
To move the query results to a specific bin, select “Bin” under the “Batch Management” heading in the “Output” drop-down menu. After you select “Bin,” click “Export.”

After you click “Export,” you will be taken to the “Bin Management” page. From the “Bin Action” drop-down menu, select “Set Bin.” In the “Bin” drop-down menu, select the bin to which you want to move the applications. This same process – using a Reader query to move multiple applications into Dept Review bins –can be followed to waitlist or deny multiple applications at once.

You’ll notice that some options in the “Bin” drop-down list don’t appear in your Reader view. These bins are for Graduate School use only. **No bins listed between “Waitlist” and “Deny-Release” should ever be selected.**
Once you select a bin, you can then also use the “Queue Action” drop-down menu to add or clear readers. If you select “Add Readers,” enter their names into the “Add Reader” field to add the selected applications to their queue. Their names will auto-populate once you begin typing.

**Best Practice:** If you don’t want the applications to move bins, and only have readers assigned to them, you can set the “Bin Action” drop-down menu to “Leave Current” and just select “Add Readers” from the “Queue Action” drop-down.

If you want to remove the selected applications from readers’ queues, select “Clear Readers” from the “Queue Action” drop-down menu. To remove individual – but not all – readers who have the selected applications in their queue, select “Clear Specific Readers,” and then type their name(s) in the “Remove Reader” field.
Overview of Review Forms

Once an application has been added to your queue and the “Review Form/Send to Bin” button is selected, all forms will be located to the right side of the reader.

There are four forms available to departments, depending on user’s security role and which of the Reader’s bins you are currently viewing. The below table shows which forms are available in which bin. Depending on your security role, you may have access to multiple forms.

<table>
<thead>
<tr>
<th></th>
<th>Waive Dept Exam Form</th>
<th>GSC Review Form</th>
<th>Departmental Reader Review Form</th>
<th>DGP Decision Review Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Awaiting Materials</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Dept Review</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>2 Dept Review</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3 Dept Review</td>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>4 Dept Review</td>
<td></td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Waitlist</td>
<td></td>
<td></td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
**Waive Dept Exam Form and GSC Form**

The Waive Dept Exam Form and the GSC Form are both available in the “Awaiting Materials” bin. The GSC Form will only be available to those with the NCS CAMPUS GRAD Admiss Processor security role.

To mark departmental entrance exams as “Received,” select “Yes” in the drop-down menu. This will mark the checklist item as “Waived” on the application.

If an applicant should be in the ABM program, select “Yes.” After completing the form, you should upload an ABM Plan of Work via the Slate dashboard. See upload materials instructions...

Selecting “Withdraw” will remove the application from further review and will post a decision of “Withdrawn” to the applicant’s record.

Select the “Next Bin” to which you want to send the application and click “Send.” Once you click “Send,” the application will be removed from the current bin and moved into the selected “Next Bin.”

If you want to waive the departmental entrance exam, but leave it in the current bin until other materials are received, set the “Next Bin” to “Awaiting Materials.”
GSC Review Form

The GSC review form is available in the “Awaiting Materials” bin and all of the departmental review bins, including the “Waitlist” bin.

- Check the “GSC Review Form” box to expand the form.
- A GSC can add any notes that they may want DGPs or departmental reviewers to see while reviewing the application.
- Indicating the applicant’s GPAs here will populate the GPA fields on both the DGP review form and the Graduate School Liaison form.
- Select the “Next Bin” to which you want to send the application and click “Send.”
DGP Review Form

The DGP review form is available in all the departmental review bins, including the “Waitlist” bin.

- **DGP Decision Review Form**
  - **Program**: Business Administration
  - **DGP Recommended Degree/Delivery Method**: MBA Part Time - Online
  - **DGP Recommended Concentration/Subplan**: Supply Chain Management
  - **DGP Recommended Admit Term**: Spring 2019

- **Student is in an ABM program**: Yes
  - **Ugrad GPA**
  - **Grad GPA**

- **Decision**
  - **DGP Decision**

- **Send to Bin**
  - **Current Bin**: 1 Dept Review
  - **Next Bin (required)**
  - **Next Reader (optional)**

- **Send**

Check the “DGP Decision Review Form” box to expand the form.

The applicant’s program, delivery method, area of interest, and admit term will populate based on the information provided in the application. If the information they have entered is correct, leave the fields alone. If they should change, select the correct option from the drop-down.

If an applicant should be in the ABM program, select “Yes.” After completing the form, you should upload an ABM Plan of Work via the Slate dashboard.

Select either Deny, Recommend Full Admission, Recommend Provisional Admission, Waitlist, or Withdraw from the drop-down.

Once the DGP review form is complete and ready to be sent to the Graduate School, the DGP should set the “Next Bin” to the “Complete – Send to Grad School” bin and click “Send.” This will complete the application.
Dept Reader (Faculty) Review Form

The Reader review form is available in all the departmental review bins, including the “Waitlist” bin.

- The ratings from these fields are averaged to produce the total rating.
- Once the Dept Reader Review Form is complete, the reviewer should click “Send.” No change to “Next Bin” is necessary.
### Post Decision Workflow

Once applications have been recommended for admission and sent to the Grad School for review, they’ll disappear from your Program Review column of bins. If you need to go back and look at those applications again, you’ll click on the Post Decision workflow under the Reader section.

There is only one bin that holds all applications that have been recommended for admission. **Denied applications will not show here.**

You’ll notice that the column headers are different than in the normal reader. All other features will work the same as they do in the normal reader.

If you have any questions or need assistance, please contact The Graduate School.