



From Application Cloning to Custom Copying

How to Build and Automate Your Own Process





Enrollment Information

- Pullman: 17,827 students
 - Residential campus
- Spokane: 1,424 students
 - Health Science campus
- Tri-Cities: 1,430 students
- Vancouver: 2,833 students
- Everett: 186 students
 - Degree-completion campus
- Global (Online): 3,839 students



**1,523 International students
~50/50 Undergrad/Grad**



International Admissions Information (2023)

- 4 Main Student Types
 - Undergraduate direct-entry
 - Undergraduate bridge/pathway
 - Graduate bridge/pathway
 - Academic English (ESL)
- ~9,600 Int'l application records
- ~2,500 Fully-submitted applications





Illinois College Admissions

- ~5,500 total submitted apps in past year
 - ~3,500 First-time Domestic
 - ~1,000 First-time International
 - ~500 Total Transfer
 - ~500 Total Online Campus
- Online Programs
 - RN to BSN and MSN
 - Accounting, Agribusiness Management, etc.
 - ESL and Reading Teacher Endorsements
 - Post-Baccalaureate Education Licensure
 - 6 distinct start dates in an academic year





Resources

<https://bit.ly/CustomAppCopy>



Challenge

Application cloning via built-in tool functionality

- Possible human error
- Breadth of permissions needed
- Staff time to ‘clean up’ after initial creation
- Different page structure
- Impersonating applicant to populate excluded fields



Solution

Recreate cloning process through other Slate tools

- Internal form and set of scheduled export-import loops
- Application data and document materials
- Webservice and sFTP export
- Expedite when needed



Cloning Pros and Cons

Pros

- Fast
- Can clone across rounds
- Flexibility in what all is cloned
- Built-in/delivered functionality

Cons

- Just makes a copy of the application
 - Requires additional steps to add/change information on application (e.g. changing from undergrad to ESL)
- Staff w/ population-based permissions can't update until rules run
 - Leads to staff having global update permissions to avoid downtime





Custom Copy Pros and Cons

Pros

- Can set/change field values for target application (e.g. undergrad to ESL)
- Can copy/create other app-scoped things like decisions
- Can incorporate other process-related steps like activities denoting reason for copying
- Time delay + notification alleviates need to wait for rules to run, or having global permissions

Cons

- Totally custom – a truly “DIY” solution
- Copying process takes longer
 - Especially material copying
- More customization = more maintenance

Is This a Good Idea for You?

- Simple is better than complex.
- Complex is better than complicated.
- If the implementation is hard to explain, it's a bad idea.
- If the implementation is easy to explain, it may be a good idea.
 - From “The Zen of Python”



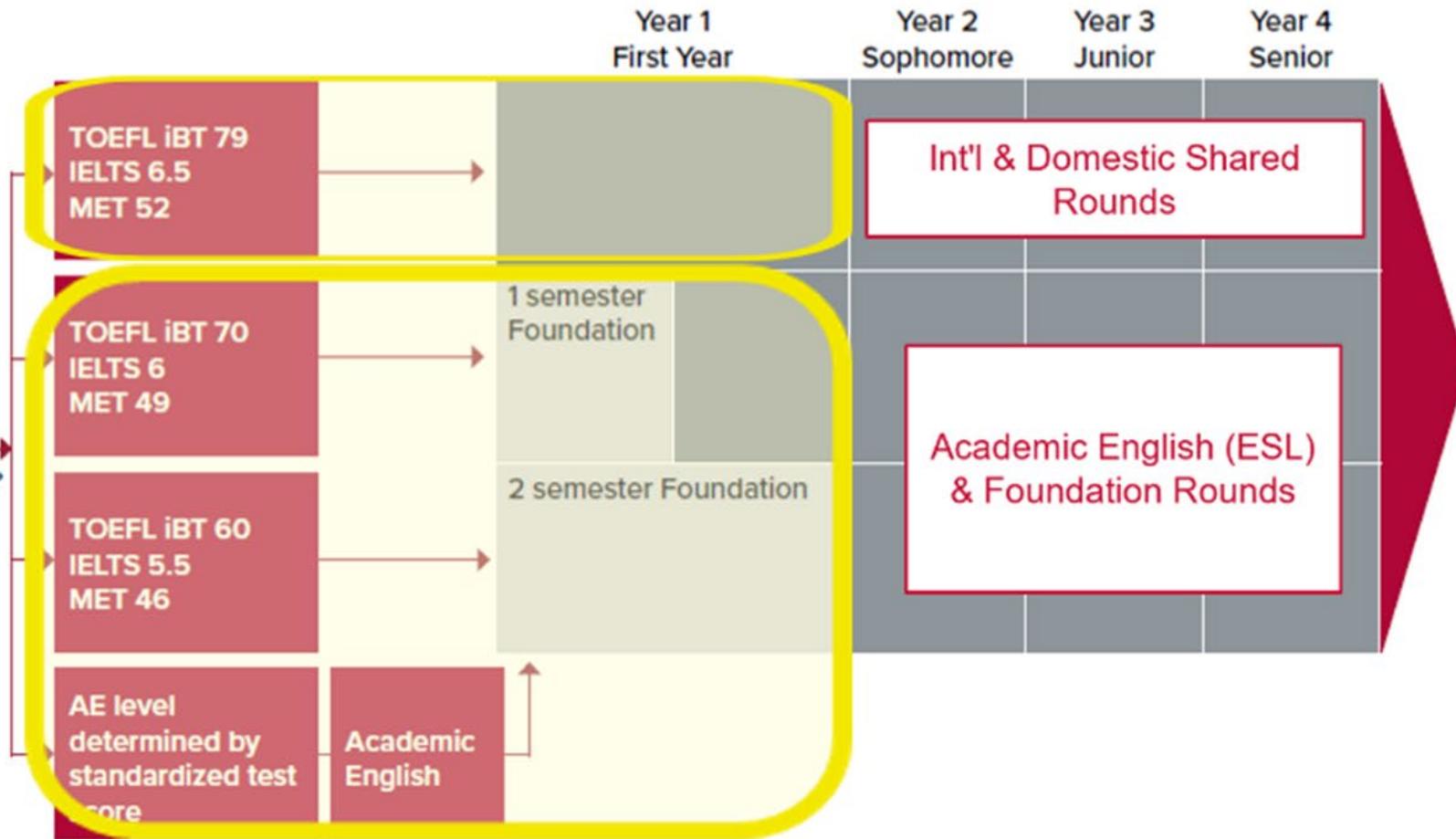


WSU's Challenge:



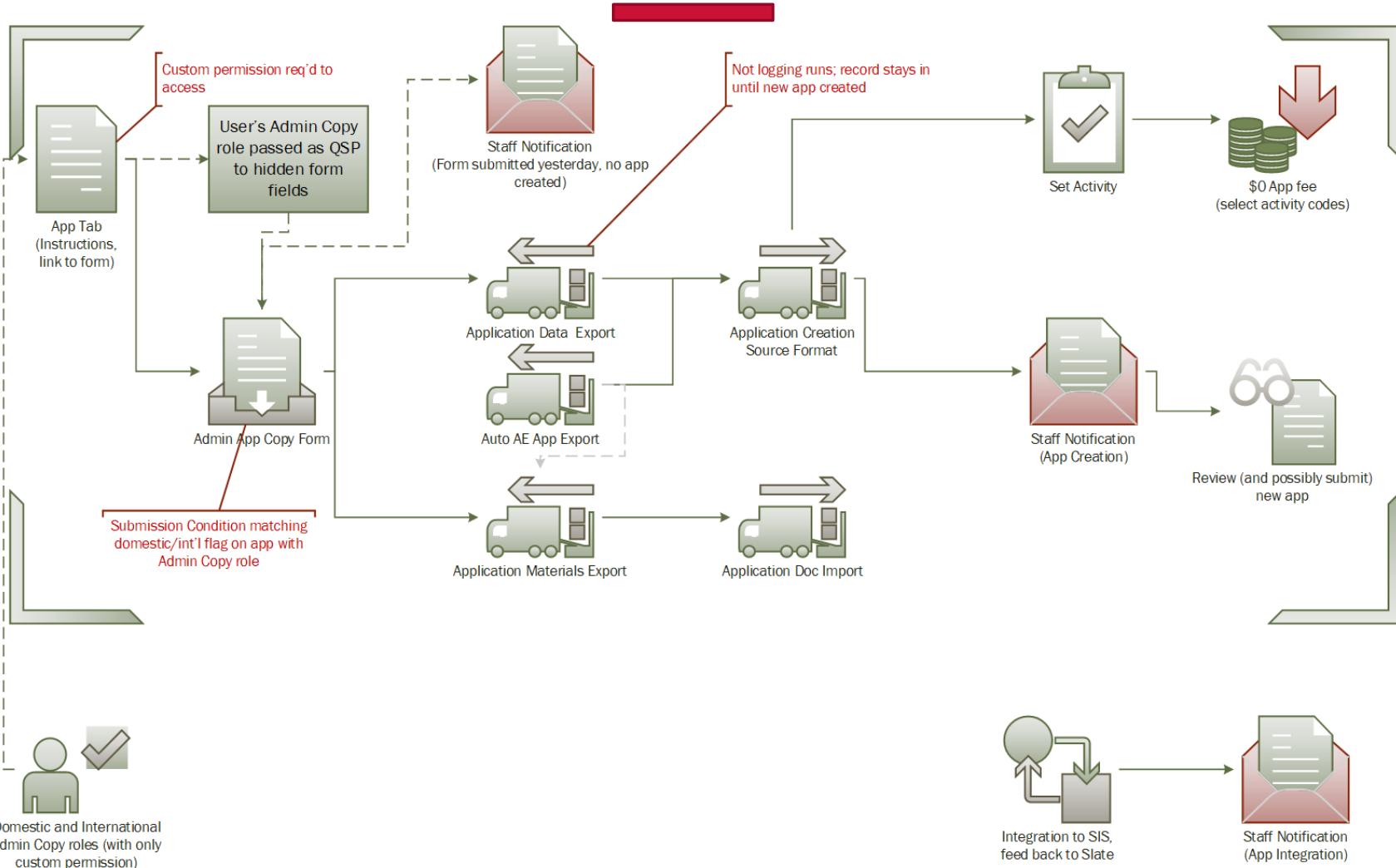
High School
Diploma
(or equivalent)
2.3 GPA

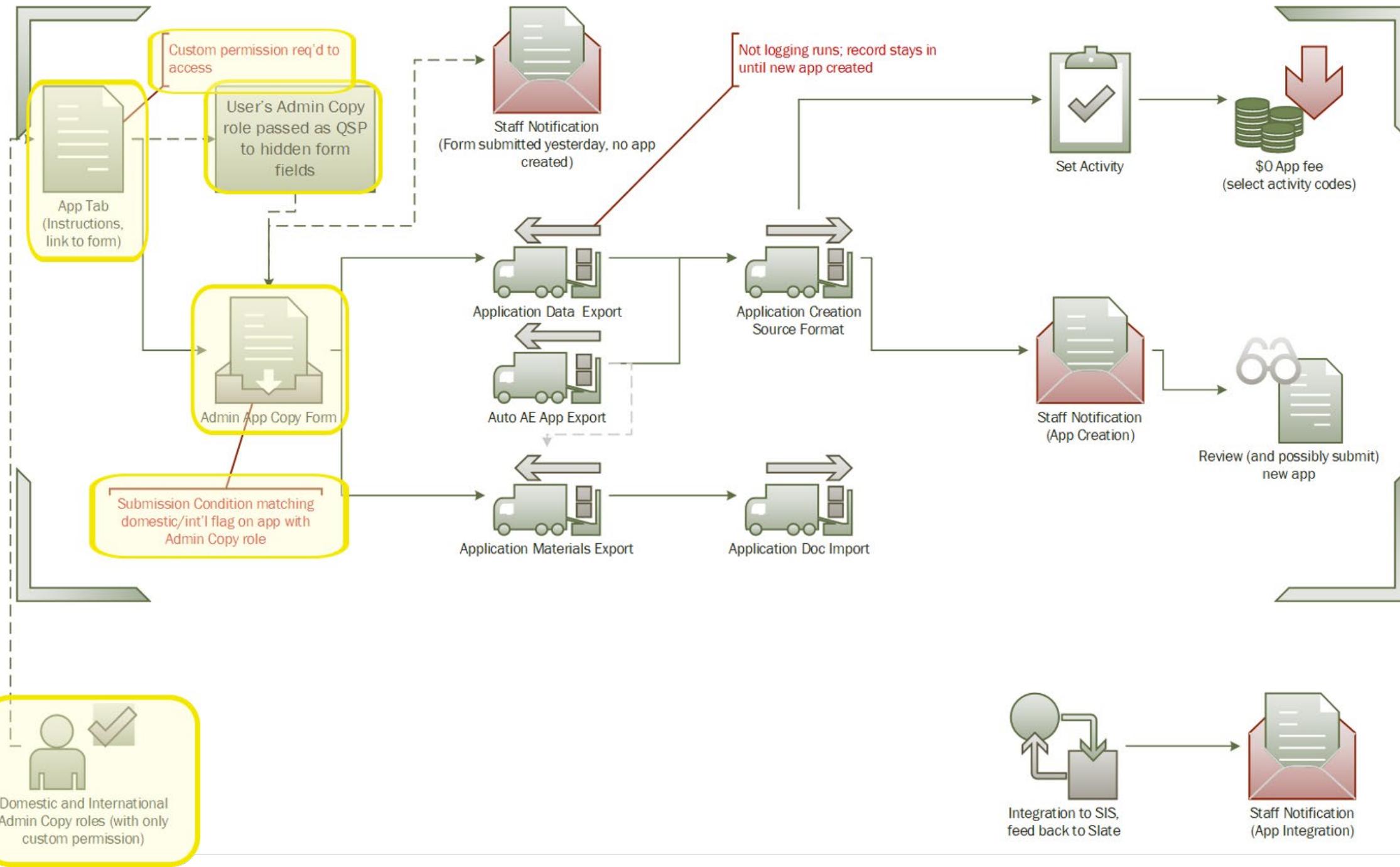
What are your scores?





WSU's Solution:







Administrative Application Copy

For Deferrals/Term Changes, Cascading Applications (from direct entry to Bridge), or adding an Academic English application.

This process will copy the core data from this application, and create a new application with the specified round. If you chose to create an Academic English or Bridge application (international applicants only), you will have additional options.

Note:

- Clicking the "copy" button below will take you to the form where you can choose what you want the target application to look like
 - Round/admit term (and other options for AE/Bridge)
 - Copy latest decision (Y/N)
 - Copy app-scoped materials (Y/N)
- You will have the option to have the new application created in submitted status
 - Note: Once an application is submitted, there are quite a few rules and processes that will run, so only choose this option if you are confident the new application will not need to be edited
- You will receive a notification email once the application is copied, and once it integrates with myWSU





Administrative Application Copy

Record: Wukong Sun (jkong@gmail.com)

Registrant Name or Email Address

This form will copy the source application and save it as a new application with the changes specified below. Follow these steps to ensure that the new application is created as intended:

1. Review the **Source Application** information below, to confirm you are copying the correct application
2. Set the information (Round, etc.) for the **Target Application**
3. Choose whether to copy the **Source Application's** decision
4. Choose whether to copy the **Source Application's** (app-scoped) materials
5. You will receive a notification email once the application has been created, and once it integrates to myWSU (overnight)

Source Application Information

This is the application that you are copying:

| | | | |
|------------|--------------|------------|-----------|
| Name | SUN, Wukong | myWSU ID# | 011769551 |
| Slate app# | 007607145 | myWSU app# | |
| Admit Term | Campus | Campus | |
| App Plan 1 | Anthropology | Admit Type | |

Information about the source application

- * Values for the new application
- * Reason for copy
- * Submission status

Option to copy over decision

Option to copy over materials

More instructions

Target Application Information

This is the information you are changing:

Round*
2023 AE/Bridge

Admit Type*

Reason for Creating New App*

This will be logged as an application activity on the new application.

- Deferring to Later Term
 Administrative Update

Will this application be administratively submitted?*

This will be logged as part of the application activity, and will also impact application fee calculation and communications related to unsubmitted applications.

- Yes (exclude app from reminder emails)
 No (prompt student to submit)

Create application in submitted status?*

If you know that changes will need to be made to the new application (such as a DE applicant needing a change of campus or academic interest), choose "No". Otherwise the application can be created in submitted status.

- Yes
 No

Latest Confirmed (and/or Released) Decision

This decision can be copied to the new application in Confirmed (not released) status:

The most recently confirmed decision is : on , with a status of .
 (myWSU Action/Reason: /)

Copy over above decision?

- Yes

Application Materials

These materials can be duplicated, for use with the new application:

- Accepted English Proficiency
- Student-Submitted English Proficiency

Copy over above materials?

- Yes

Select the Admit Type

Select the Admit Term

Select the App Copy Reason

Submit

Cancel

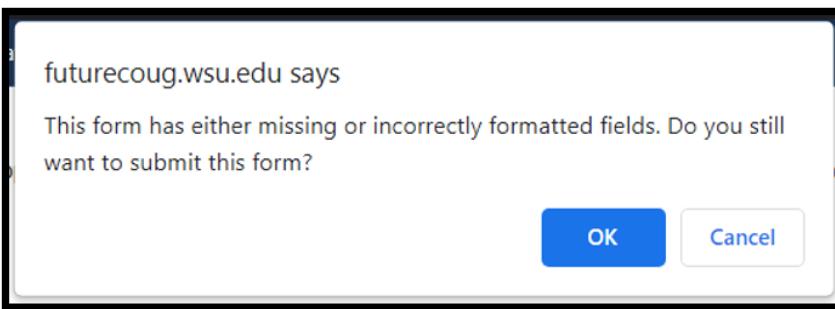




Lesson Learned #1



- Users *will* submit an incomplete application copy form, despite the popup
 - Add text to show what still needs to be done



• Student-Submitted English Proficiency

Copy over above materials?

Yes

Select the Admit Type

Select the Admit Term

Select the App Copy Reason

Submit **Cancel**

A screenshot of a web form section. It includes a bulleted list, a question "Copy over above materials?", a checked checkbox labeled "Yes", and three empty checkboxes for "Select the Admit Type", "Select the Admit Term", and "Select the App Copy Reason". A yellow rounded rectangle highlights the last three items. At the bottom are "Submit" and "Cancel" buttons.

Edit Form

Folder
ScopeTabs /
Application

For Deferrals/Term Changes, Cascading

This process will copy the core data from one student record to another. It will create an Academic English or Bridg

Edit Properties

General

Merge Fields

Exports

Export



Join Application

Join Current User

GUID

ip_role

dom_role

Link Type

URL

Protocol

<other>

URL

on={{GUID}}&ip_role={{ip_role}}&dom_role={{dom_role}}

Browse Server





Submission Conditions

Submission Denied message to be displayed when registrant does NOT meet filter criteria below

B *I* **U** **S** | | | | | **T_x**

This applicant does not appear to be in a population to which you have access.

Filters

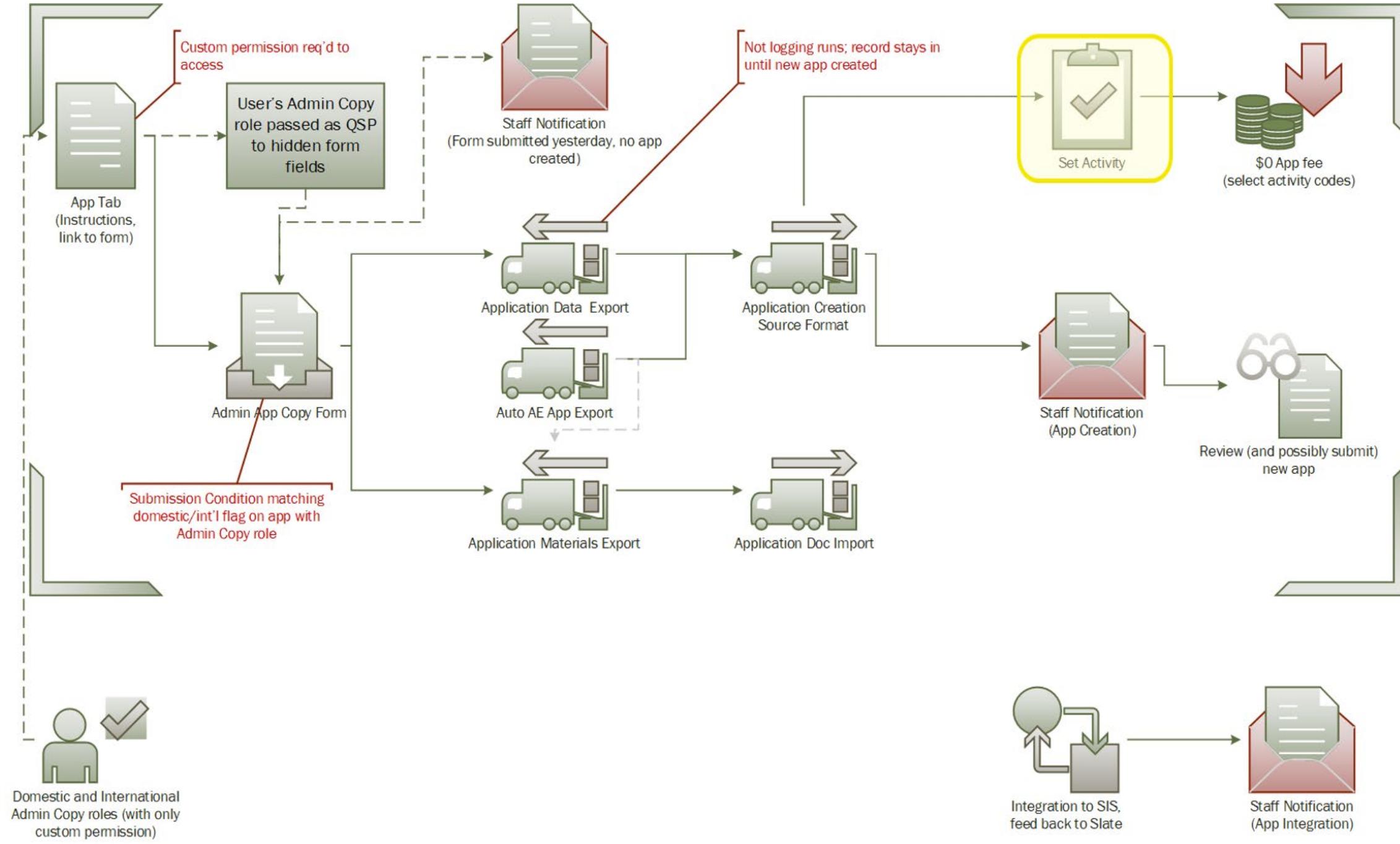
Filter NOT () OR) Join

Join Application

Int'l App, IP Copy Role

OR

Dom App, Domestic Copy Role





Backup/record?id=6b76f049dd66

Slate Slate KB TEST Slate TEST-2 Slate WSU Links WebCenter Content IP IUA WSU Office 365

MER 2023 UGRD Sent to myWSU ■ 2023 AE/Bridge Active in Program ■ 2023 AE/Bridge SPRING 2023 UGRD Profile M

Display Response [Prev](#) [Next](#) [X](#)

Target Application Information

This is the information you are changing:

Round* SUMMER 2023 UGRD

For Undergrad apps (excluding international bridge program), the campus and major information will be copied over to the target app; this can be changed after the target app is created, if needed.

Reason for Creating New App* Deferring to Later Term

This will be logged as an application activity on the new application.

Will this application be administratively Yes (exclude app from reminder emails)

SUMMER 2023 UGRD Sent to myWSU **2023 AE/Bridge Active in Program** **2023 AE/Bridge** **SPRING 2023 UGRD**

Graduate Admissions Activity [Prev](#) [Next](#) [X](#)

| | |
|------------------|---------------------------------|
| User | [REDACTED], Paul |
| Code | Administrative Application Copy |
| Subcode | Deferral/Term Change |
| Date | 04/24/2023 |
| Time | 11:31:53 AM |
| Subject | [REDACTED] 6b76f049dd66 |
| Private Comments | |

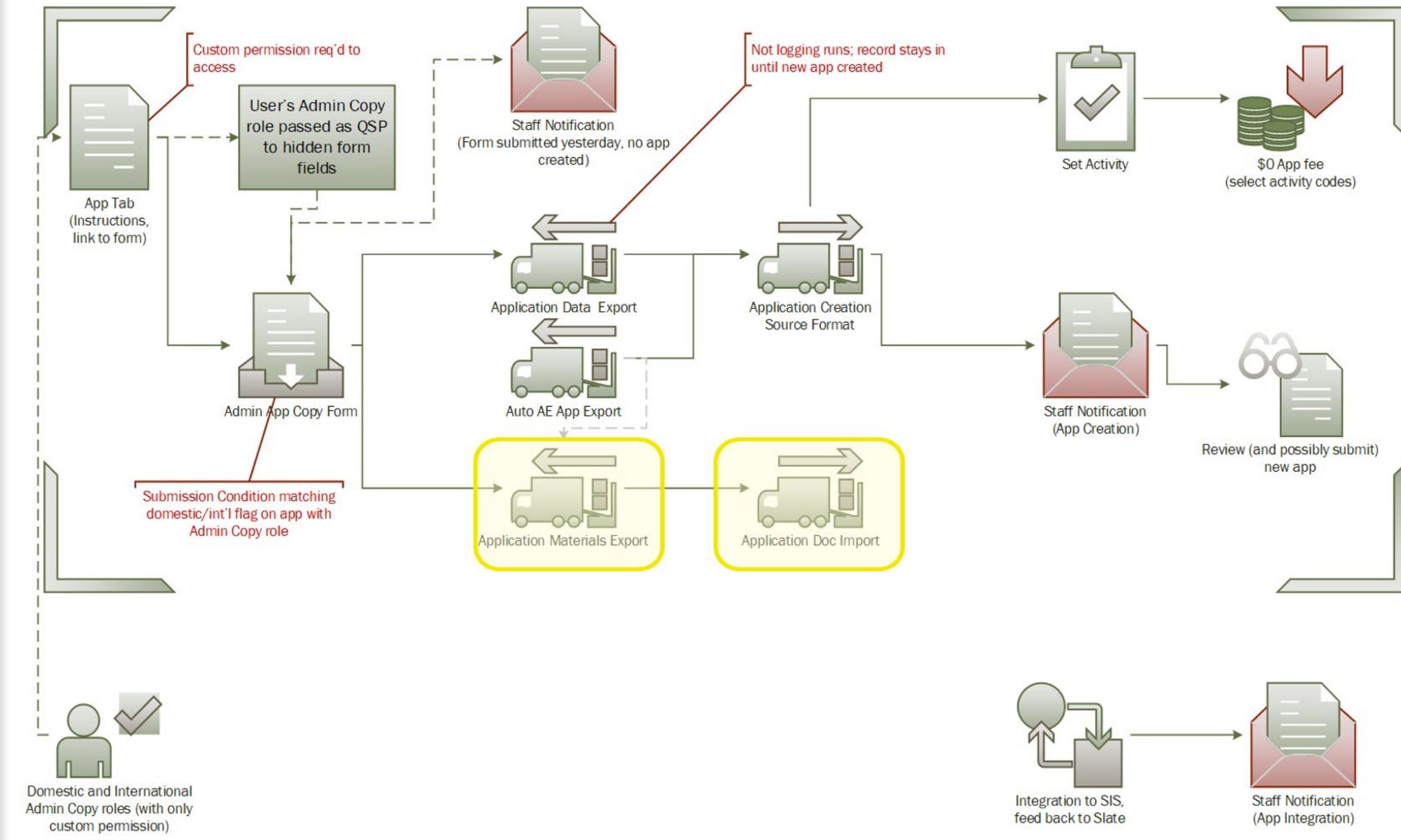
473747652

Pullman

First-Year Student Summer 2023



WASHINGTON STATE UNIVERSITY





App Copy Materials Export CJ

| | |
|------------------|---|
| Folder | International / Scheduled |
| User | Trevor Kingsley |
| Realm | International |
| Base | Configurable Joins - Document |
| Execution Mode | Retrieve only the new records since query was last run |
| Scheduled Export | /incoming/IP_App_Copy_Docs_%FT%T.zip |
| Limit Rows | 500 |
| Filters | Data Sent to Admin App Process Yesterday Exists Admin App Copy Form skip materials NOT EXISTS Not Exists Lookup Material / Name IN Academic Resume, Accepted English Proficiency, Additional Document |

Edit Query

| | | | |
|------------------|--|------------|--|
| Folder | International / Scheduled | Name | Application Slate GUID |
| User | Trevor Kingsley | Source | Subquery Export |
| Realm | International | Type | Dependent subquery |
| Base | Configurable Joins - Document | Output | Rank |
| Execution Mode | Retrieve only the new records since query was last run | Row Offset | 1 |
| Limit Rows | 500 | Exports | Export New App GUID |
| Scheduled Export | /incoming/IP_App_Copy_Docs_%FT%T.zip | Filters | Filter NOT (OR) Join |

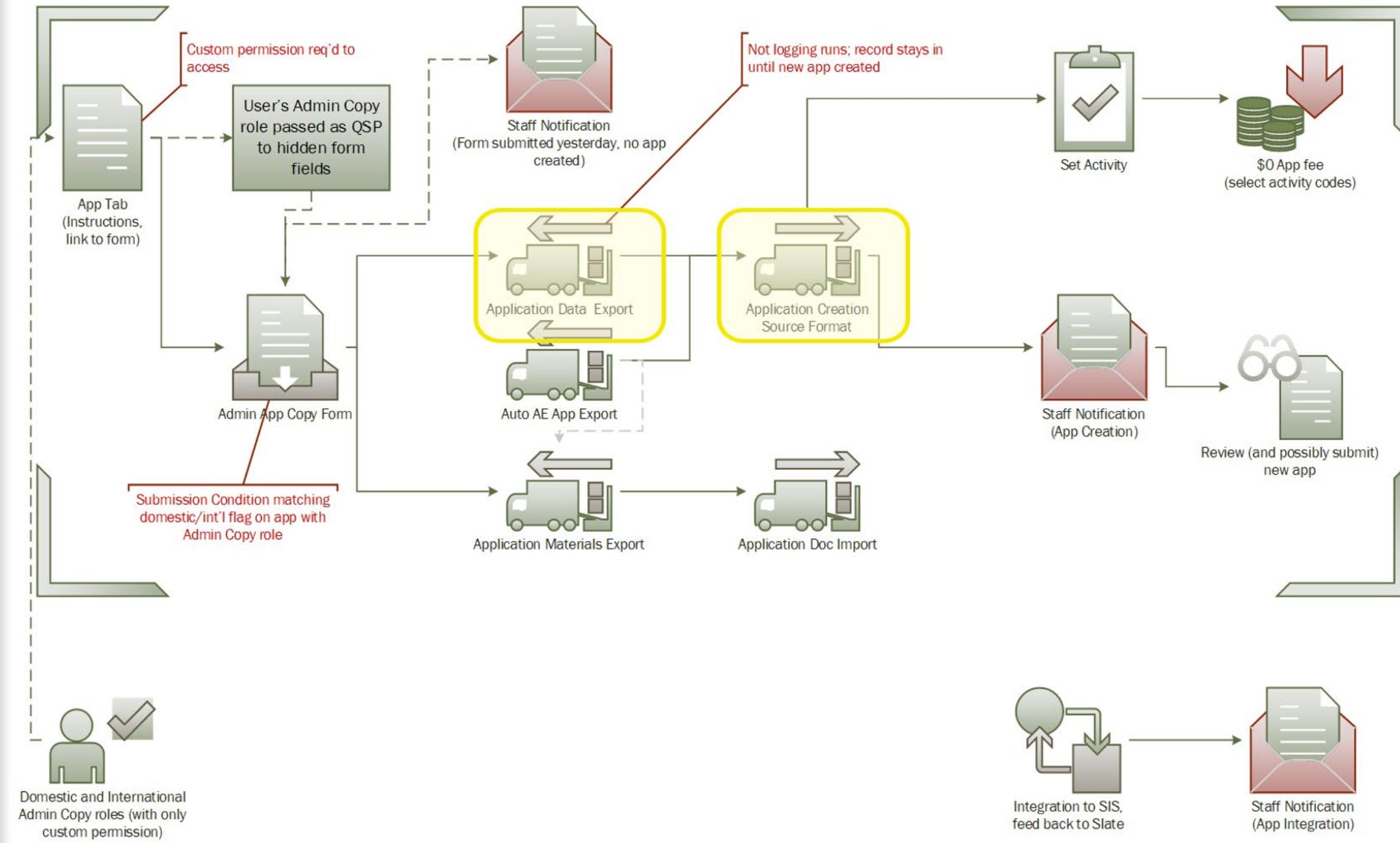
Exports

Application Slate GUID Rank Row Offset: 1

Join New App

Join New App / New App Activity

New App Activity / Code IN Administrative Application Copy - Adding A...





Administrative Application Copy Export v2

| | |
|----------------|--|
| Folder | International / Scheduled |
| User | Trevor Kingsley |
| Realm | Administrator |
| Base | Configurable Joins - Form Response |
| Execution Mode | Retrieve all records each time query is run |
| Filters | <p>Form / Title IN International / Application/Administrative Application Copy Registration Status IN Registered Form Submission Date >= TODAY - 1 Form Submission Date > 2/17/2023 No Copied App GUID within Today - 1 Not Exists</p> |
| Matching Rows | 0 |

Run Query





Lesson Learned #2



- (Apparently) Source Format web service calls can timeout before a query finishes running
 - Query runs successfully, but no file imported by source format
 - May need to setup query to keep pulling records until copied app is generated





| | |
|---|--|
| Target_Round | Form Field Export Key = Target_Round |
| Application_Admit_Term | Form Field Export Key = Admit_Term |
| Ae_Session | Form Field Export Key = Ae_Session |
| Application_Program_1 | Formula CASE WHEN @Admin-App-Copy-Aebr_Type LIKE 'Academic English%' THEN @Admin-Aj ELSE @Admin-Aj END |
| Application_Plan_1 | Formula CASE WHEN @Admin-App-Copy-Aebr_Type LIKE 'Undergraduate Foundation%' THEN @Adr ELSE @Adr END |
| Reason | Form Field Export Key = Reason |
| Admin_Sub | Form Field Export Key = Admin_Sub |
| Sub_Now | Form Field Export Key = Sub_Now |
| FeeWaiver_Admin_Approve | Form Field Export Key = FeeWaiver_Admin_Approve |
| FeeWaiver_Admin_Notes | Form Field Export Key = FeeWaiver_Admin_Notes |
| FeeWaiver_Dept_Bill | Form Field Export Key = FeeWaiver_Dept_Bill |
| FeeWaiver_Admin_Date | Form Field Export Key = FeeWaiver_Admin_Date |
| Undergraduate_Application_Fee_Waiver_Flag | Formula CASE WHEN @approved = 'Approved' THEN '1' END |
| decision_code | Formula CASE WHEN @copy = 'Yes' THEN @code END |
| decision_reason | Formula CASE WHEN @copy = 'Yes' THEN @reason END |
| decision_date | Formula CASE WHEN @copy = 'Yes' THEN @System-Current-Date END |
| Sub_Date | |
| Submitter_Username | |



Source Formats

XML Administrative App Copy2

General Format Definition Import Automation

Format XML

```
<layout type="xml" node="/data/row">
<f s="Person_GUID" id="Person_GUID" />
<f s="Random_ID" id="Random_ID" />
<f s="Target_Round" id="Target_Round" />
<f s="Application_Admit_Term" id="Application_Admit_Term" />
<f s="Ae_Session" id="Ae_Session" />
<f s="Application_Program_1" id="Application_Program_1" />
<f s="Application Plan 1" id="Application Plan 1" />
```



Source Formats

XML Administrative App Copy2

General Format Definition Import Automation

Format

Status

Type

Remap As Of Date

Remap Status

Scope

Import Path/Mask

Import Remote Server

HTTP Headers

Add a list of headers in the form <t name="HEADER">VALUE</t>

<https://futurecoug.wsu.edu/manage/query/run?id=42115bd9-8f81-46>

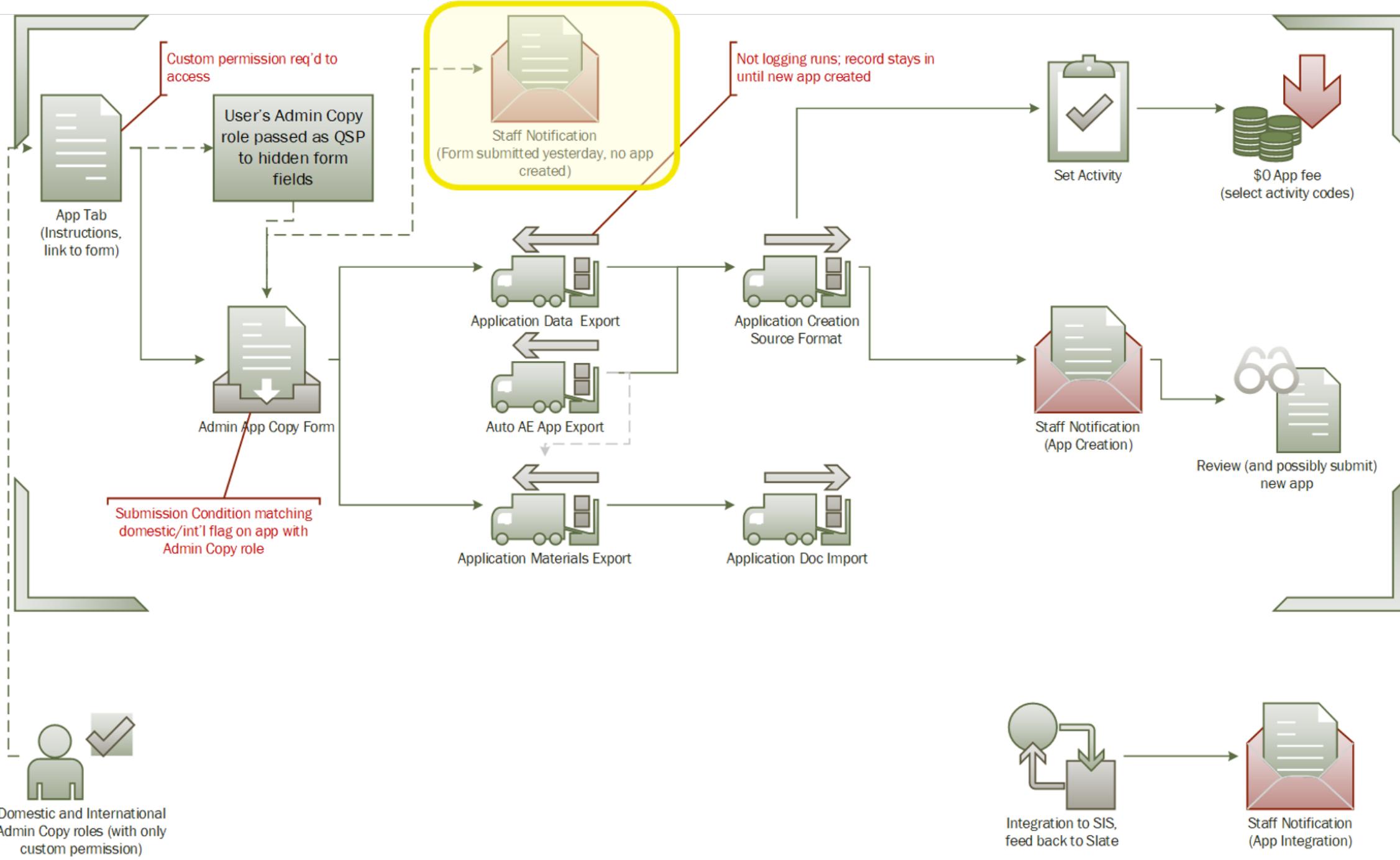


Lessons Learned #3 & #4



- Keep your field name characters very *un*-special
- Queries seem to be less sensitive than source formats





App *Not* Copied Staff Notification

| | |
|-----------------|--|
| Method | Email |
| Folder | International / Staff Notifications |
| User | Trevor Kingsley |
| Realm | International |
| Recipient Lists | App Copy Form, no new app (live query) Has Copied App since Yesterday No New App |
| Current Status | Scheduled/Running |
| Start Date/Time | 04/12/2023 07:53 PM |
| Stop Date/Time | Sending until suspended |
| Opt Out | No Unsubscribe (disregard opt out; transactional mailings only) |

You recently submitted an Administrative Application Copy form for ,
[REDACTED] (WSU ID# [REDACTED]) - but a new application has **not** yet been created. Please review the source application and try re-copying the application.

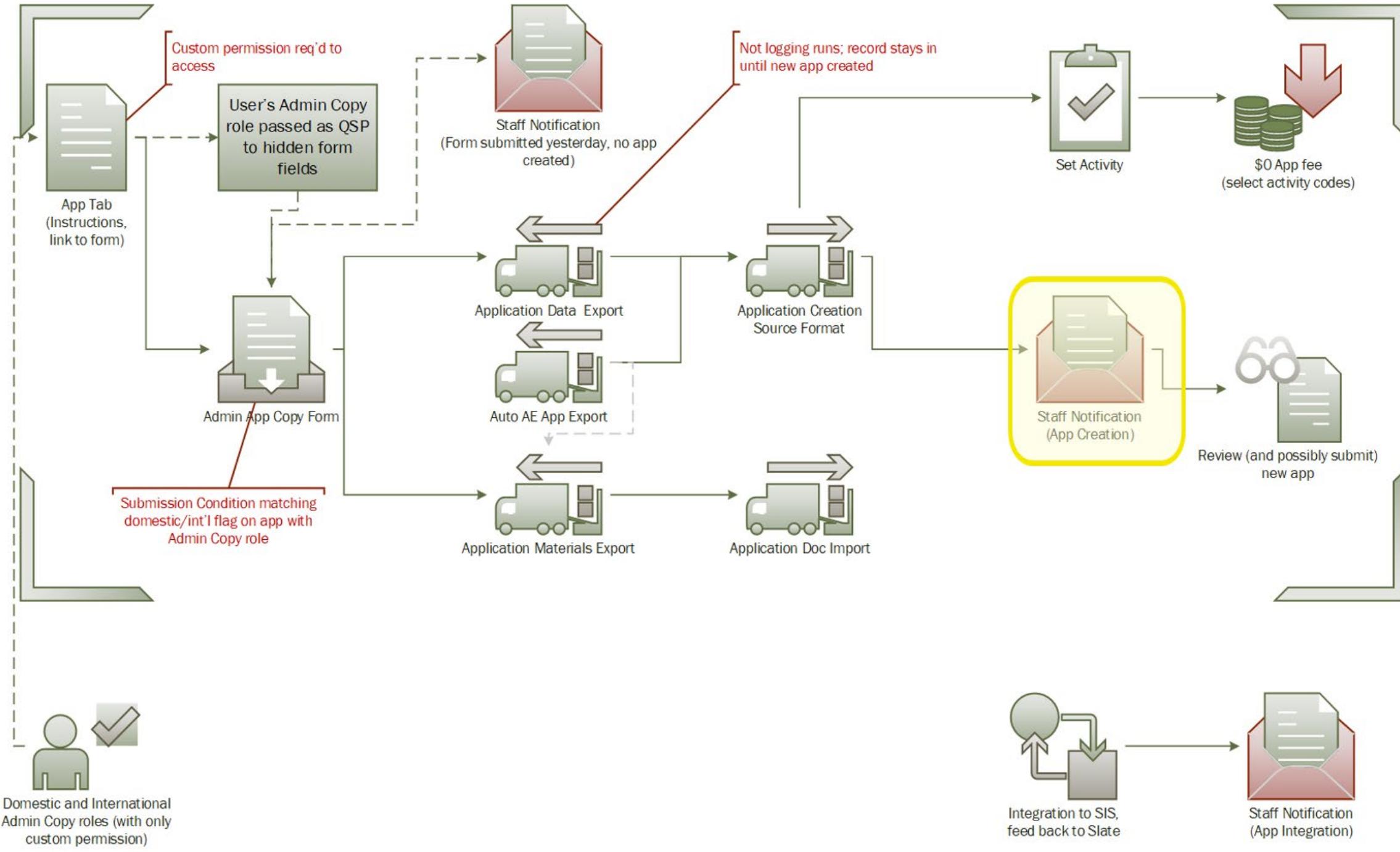
Target Application Details (from form submission):

| | |
|----------------------------|--|
| Admit Term / Round: | Fall 2023 (Aug - Dec) / 2023 AE/Bridge <i>Fall 1 (August - October) session</i> |
| AE/Bridge Type: | Academic English |
| Copy Reason: | Adding Academic English App - Admin Submission: Yes (exclude app from reminder emails) |

[Check Source App](#)



WASHINGTON STATE UNIVERSITY



App Copy Staff Notification

Method Email
Folder International / Staff Notifications
User [Trevor Kingsley](#)
Realm International
Recipient Lists [App Copy Exists \(live query\)](#)

Current Status **Scheduled/Running**
Start Date/Time 04/12/2023 07:19 PM
Stop Date/Time Sending until suspended
Opt Out No Unsubscribe (disregard opt out; transactional mailings only)

Code IN Administrative Application Copy, Administrative Application Co
Date >= TODAY - 1
Application International IN Yes

A new application (Slate application # [REDACTED]) has been created in submitted status for [REDACTED] (WSU ID# [REDACTED]). Please review the application and complete any remaining steps needed to produce the desired application.

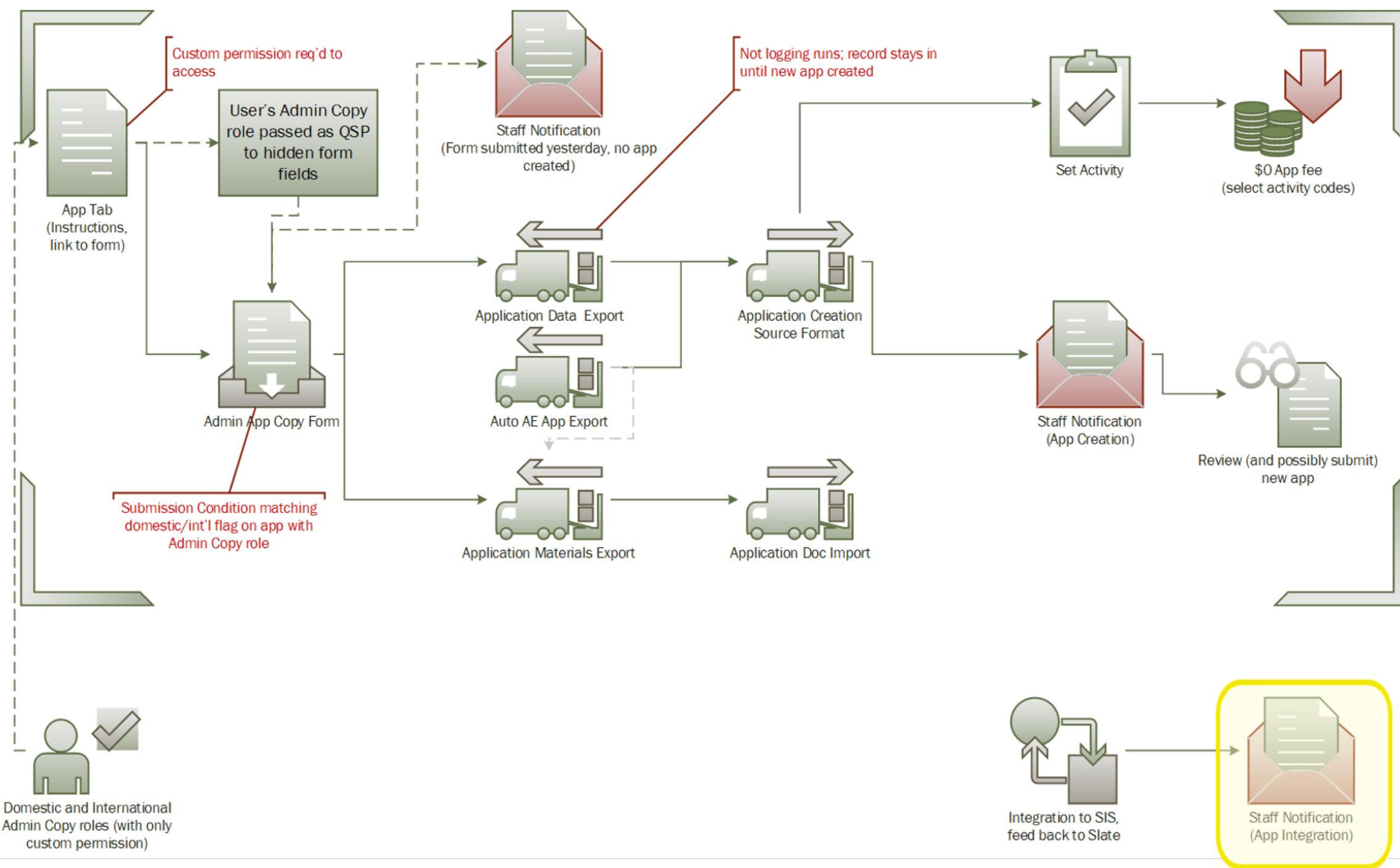
New Application Details:

| | |
|---------------------|--|
| Admit Term / Round: | Summer 2023 / 2023 Summer Undergraduate Admissions Application |
| Admit Type: | First-Year Student |
| Campus: | Pullman |
| Plan 1: | Business |
| Copy Reason: | Deferral/Term Change |

Decision Details:

The following decision has been copied over: MATR: (Confirmed (but not Released))

[Check App](#)



Copied App Integration Staff Notification

| | |
|-----------------|--|
| Method | Email |
| Folder | International / Staff Notifications |
| User | Trevor Kingsley |
| Realm | International |
| Recipient Lists | Copied App Integrated (live query) |
| | Code IN Administrative Application Copy, Administrative Application Cop Date > 11/21/2022 myWSU app # exists Application International IN Yes |
| Current Status | Scheduled/Running |
| Start Date/Time | 04/12/2023 10:37 PM |
| Stop Date/Time | Sending until suspended |
| Opt Out | No Unsubscribe (disregard opt out; transactional mailings only) |

Hello Paul,

The copied application for [REDACTED] (WSU ID# [REDACTED]) has integrated to myWSU and now has a myWSU application number listed. Please complete any processing steps necessary.

Application Details:

| | |
|---------------------|--|
| Admit Term / Round: | Summer 2023 / 2023 Academic English/Bridge |
| Admit Type: | Academic English Session 1 |
| Campus: | Pullman |
| Plan 1: | Academic English Foundation |
| myWSU App #: | [REDACTED] |

[Check App: Slate](#)[Check App: myWSU](#)

Expedite the Process

- Synchronous conversation with applicant
- Staff Assigned anxious to follow up processing
- Other dependent processes downstream





Do it NOW!

Application Scoped Materials

```
{% for item in {{app_mat}} %}  
• {{item.name}}  
{% endfor %}
```

Copy over these materials?

 Yes

Expedite?

 No Yes

Slate (Illinois College)





| | |
|------------|---|
| Form | Administrative Application Copy |
| Trigger | Upon registration or update |
| Group | Confirmation Page Only |
| Status | Active |
| Pre-Flight | No errors have been found. Pre-flight checks identify only the most common issues, so please still review your mailing. |

Edit Conditions
Edit Message

1

Exclusivity Group

Exports

Matching Rows 0

Filters

Expedite_Copy IN Yes

Expedite_Copy IN Yes

Your submission included the [Expedite] flag set to 'Yes'.

Please run the [Data](#) and the [Docs](#) queries on demand to make that happen.

Slate (Illinois College)

Execution Mode Retrieve only the new records since query was last run
Scheduled Export /incoming/App_Copy/App_%FT%T.xlsx

Filters Registration Status IN Registered
Expedite_Copy PINNED IN No

Matching Rows 0

Run Query Run to SFTP Run to Browser

Run Date Memo

Slate (Illinois College)

Expedite_Copy IN Yes



Questions

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Resources

<https://bit.ly/CustomAppCopy>

