



LIAISON

CAS

experience

JULY 24-25 2023

CHICAGO, IL

WebAdMIT Rewind: Applying Best Practices to Recent WebAdMIT Releases

July 24, 2023



A woman with dark hair, wearing a green and grey striped cardigan over a light blue shirt and clear safety goggles, is focused on her work in a laboratory. She is using a metal clamp to hold a glass flask. The lab bench is cluttered with various pieces of glassware, including beakers and flasks containing liquids of different colors (yellow, green, red). In the background, another person wearing safety goggles is partially visible. The scene is brightly lit, suggesting a modern laboratory environment.

Agenda

1. Understanding Release Notes
2. New WebAdMIT Releases
(January 2022 – July 2023)
3. Shared Lookup Table Updates
4. Q&A

Meet Our Presenter

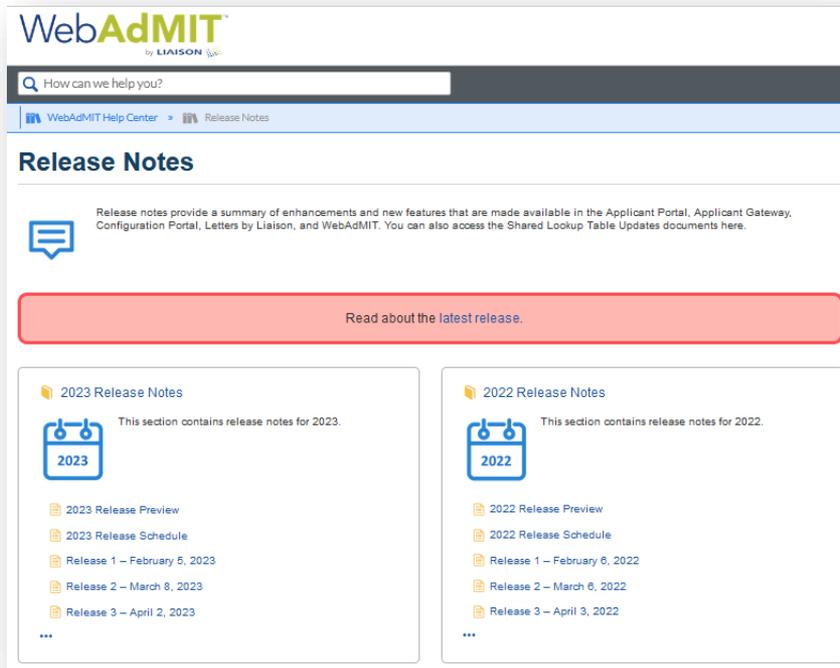
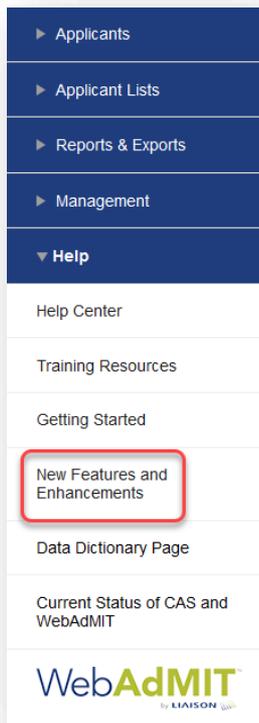


Katie Wedgewood
Knowledge Strategist
Liaison

What are release notes?

- Monthly process
- Summary of new features and enhancements
 - Current software trends and current events
 - Your feedback
- Can include screenshots, step-by-step instructions, best practices
- Highlights the benefit for you
- New documentation (e.g., reference guides, etc.)
- Scheduled maintenance
- Upcoming events, webinars, etc.

How do I find my release notes?



Release 6 – July 9, 2023

New Features and Enhancements

WebAdMIT Enhancements

Disclaimer: on rare occasions, a new feature or enhancement may be moved to a future release or otherwise subject to change.

Vertical Column Borders Throughout Entire Table

This enhancement is automatically available for use by all CASs and participating programs. No action is required on the part of any association, school, or program. Contact a member of your account team for more information.

The data within many of WebAdMIT's panels are displayed in tables. With this enhancement, the vertical column borders display throughout the entire table. Previously, vertical column borders only appeared in table headers. This enhancement reuses some of the display formatting from the old user interface.

Previous table layout without vertical column borders

Name & DemCAS ID	Email	Designation	Appl. Status	Local Status	Decision
Demo, Tanya 20080278	appteam100040@que.org	Master Program	Verified	Ready to Release	None

New table layout with vertical column borders

Name & DemCAS ID	Email	Designation	Appl. Status	Local Status	Decision
Demo, Abby E 833514733	appteam100040@que.org	Master Program	Verified	Application Received	None

This enhancement was inspired by user feedback.

Updated CAS and Cycle Drop-down Sort Order

This enhancement is automatically available for use by all CASs and participating programs. No action is required on the part of any association, school, or program. Contact a member of your account team for more information.

When you edit a user's account, the CAS and cycle selections under the Modify Assignments for Organization drop-down are now sorted in this order:

- Cycle (most recent listed first)
- CAS (sorted alphabetically)

This enhancement improves the readability and navigation of this drop-down.

This enhancement was inspired by user feedback.

Ongoing Maintenance

Please review the list of scheduled downtime/maintenance and product updates.

Event	Date	Details
Sandbox Environment Refresh	July 10, 2023	The WebAdMIT Sandbox environment (sandbox.webadmit.org) was refreshed with current (cleansed) production data and program configurations. Any test exports, custom fields, etc. in the current sandbox were overwritten.
Sandbox Environment Refresh	August 7, 2023	The WebAdMIT Sandbox environment (sandbox.webadmit.org) will be refreshed with current (cleansed) production data and program configurations. Any test exports, custom fields, etc. in the current sandbox will be overwritten.
Shared Lookup Table Updates	August 27, 2023	Many fields in the Applicant Portal contain predefined answer values that applicants can select; for example, the Country and County fields both have predefined answer values. These values are housed in shared "lookup tables" which are viewable in your CAS's/InCAS's data dictionary located under the Help panel in WebAdMIT. Lookup table change requests should be sent to a member of your account team, who will compile and review these requests. The deadline to submit change requests was June 16, 2023. New lookup table values will appear in the Applicant Portal on August 27, 2023 (subject to change). Review the Shared Lookup Table Updates page for more information.

Upcoming Events

Event	Date	Details
SOLD OUT – Liaison CAS Experience in Chicago, IL	July 24–25, 2023	Refine your skills, broaden your perspectives, and elevate your strategic thinking alongside like-minded higher ed professionals at the Inaugural Liaison CAS Experience, July 24–25 in Chicago, IL. Register now!

Anatomy of a Release Note

- New Features and Enhancements (broken up by product)
- Ongoing Maintenance
- Upcoming Events
- Table of contents



User Interface Updates

Dashboard and General User Interface Updates

- Retire WebAdMIT's old user interface
- Local Status color more prominent on Designations by Local Status panel
- Vertical column borders throughout entire table

The screenshot displays a modern dashboard interface. On the left is a dark blue sidebar with navigation options: Applicants, Applicant Lists, Reports & Exports, Management, Help (expanded to show Help Center and Training Resources), and Help. The main content area is titled 'Dashboard' and contains a section for 'Notes from DemoCAS' with a sub-section for 'Recently Submitted Designations'. This section features a table with the following data:

Name	DemoCAS ID	Designation	Date Submitted
Demo, Reese I.	8995241169	Masters Program	July 07, 2023
Demo, Leah	7362455118	Masters Program	July 07, 2023
Demo, Taylor	6787788807	Masters Program	July 07, 2023
Demo, Ann C.	9348849633	Masters Program	July 06, 2023
Demo, Hailey J.	4735054672	Masters Program	July 06, 2023

To the right of the table is a 'Designations by Local Status' summary panel with a bar chart showing counts for various statuses: 16 None, 22 Invite to Interview II, 0 Interviewed, 0 Interview Offered, 44 Invite to Interview, 9 Undecided, 19 No GRE/MCAT, 18 Deny, 140 Application Received, 0 Under Review, 0 No Response to Interview Offer, 0 Reschedule Interview, and 5 Alternate.

Personalized Subpanels for Pinned List, Export, and Report Templates in Menu Bar

- Customize your pinned templates
- Collapsible panels and subpanels

List Manager				New Field List	New Composite List
List Name	Owner	Type	Show on Menu Bar	Actions	
 Requirements Complete	dani@demo.edu	Field	<input type="checkbox"/>	   	
 In State Applicants	rafe@demo.edu	Field	<input type="checkbox"/>	  	
 Tri-state Applicants	dani@demo.edu	Field	<input type="checkbox"/>	   	
 Tri-state Applicants with Requirements Complete	dani@demo.edu	Composite	<input type="checkbox"/>	   	



▼ Applicant Lists

▼ My Lists

Requirements Complete

List Manager

▼ Reports & Exports

▼ My Exports and Reports

Application Review

GPA Averages

Export Manager

Report Manager

PDF Manager

Destination Manager

Recent Files

Improved Transfer Settings Summary Pages

▼ **Transfer Settings from Previous Setup**

Your program has not yet initiated the transfer process which moves settings from the previous cycle to the current cycle. As a result, you will not see local statuses, lists, email templates, etc. which may have been present in previous cycles until this task is completed.

Prior to initiating the transfer, confirm you are the individual designated user. Please refer to the attached PDF for more instructions regarding settings transfers here.

Please note that once a settings transfer is initiated, you will not be able to edit any settings. [Click here to initiate a settings transfer.](#)

Settings Transfer Cancel Transfer

The following is a list of all settings that will be brought into WebAdMIT.

If there are any items that you do not want to transfer from the previous cycle, they will need to be deactivated. Please hit 'Cancel Transfer,' deactivate any items in the previous cycle, and restart the transfer in the new cycle.

The settings are from [] via user []

Please approve the transfer at the bottom of this page.

Custom Fields

University ID
Description: University ID
Type: Text Value

SIS Admit Term
Description: SIS Admit Term
Type: Text Value

TOEFL Date
Description: TOEFL Date
Type: Date

Transfer Approval

Notes

- If items in your Settings Transfer share the same name, WebAdMIT renames the duplicate items upon transferring them to the new cycle. For example, if you have three email templates called EmailTemplate, in the new cycle, they'll appear as EmailTemplate, EmailTemplate_xxxx, and EmailTemplate_yyyy.
- When an export is transferred into the new cycle, the Last Exported Date option will be set to 'N' by default, regardless of the setting in the previous cycle. This setting can be changed manually once you are ready to receive data.
- When a PDF Template is transferred into the new cycle, the Set Document Last Printed Date option will be set to 'N' by default, regardless of the setting in the previous cycle. This setting can be changed manually once you are ready to receive data.
- Any schedules attached to exports, reports, etc, will also be disabled and must be re-enabled manually.

Email Templates

Missing Transcript Email
Subject: Missing Requirement in Your...
Excerpt: Hello, {{first_name}} {{last_name}}, According to our records, we h...

Standardized Tests Updates

- Standardized test type subpanels
- Official standardized test field name updates
 - **(test name) Official (field name)** (e.g., MCAT Official Test Date)
- Standardized test filters for TOEFL and select dental exams

Standardized Tests											
ACT	AP	CLEP	DAT	GMAT	GRE	IB	IELTS	MCAT	SAT	TEAS	TOEFL
Test	Status	Test Date	Official Results	Official Received By	Official Received Date	Graphical Result	Overall Result	Confidence Band	Overall Percentile	Result Notes	Details
GRE	Taken	Feb 22 2022	<input type="checkbox"/> Received	N/A	N/A	N/A	18	N/A	N/A	Quantitative Percentile + Verbal Percentile	Details
GRE General Official	Taken	Feb 22 2022	Official	PostbacCAS	Mar 04 2022	N/A	18	N/A	N/A	Quantitative Percentile + Verbal Percentile	Details



Updated Functionality



Expanded Template Access for WebAdMIT Administrators and Institution Managers

- Must have both levels of access
- View and delete templates in:
 - List Manager
 - Export Manager
 - Report Manager
 - PDF Manager
 - Email Templates (additionally, you can edit these templates)

Be sure to check all users' Work Groups and account access

List Manager and Search Updates

- Improved state drop-down display
- Field name hover text in List Manager
- New search options for In Progress applicants
- Update order of users on Admissions Users page

New Applicant Field List

This list, named and appear on the menu bar.

These settings can be seen by myself and the following work groups

Included applicants will match of the following rules:

equals

- Florida (United States)
- Florida (Uruguay)

New Applicant Field List

This list, named and appear on the menu bar.

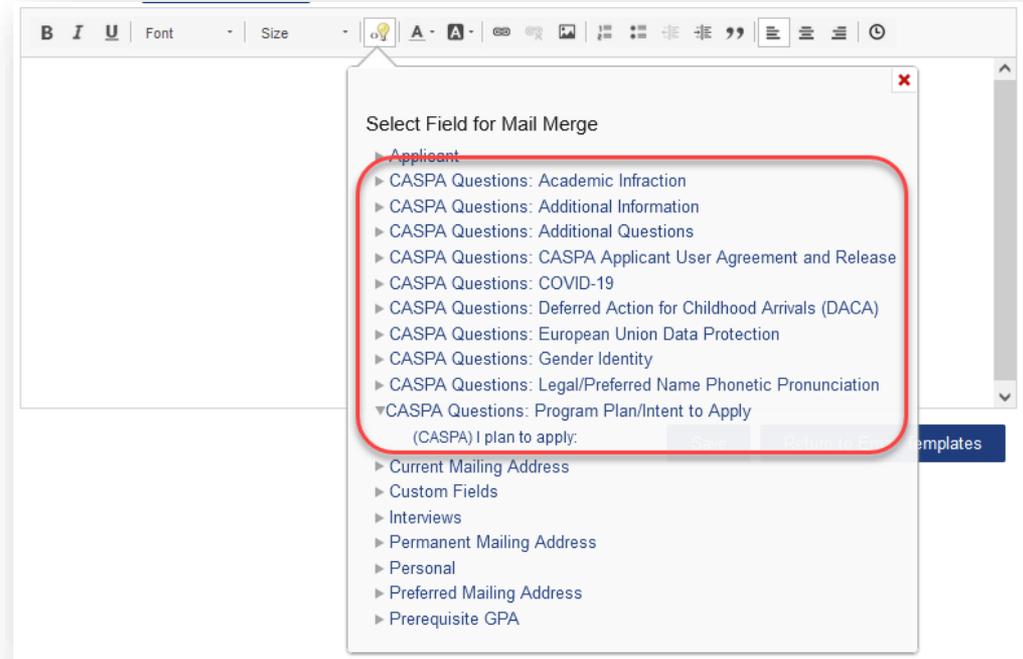
These settings can be seen by myself and the following work groups

Included the following rules:

is not null

CAS Custom Questions Available in Mail Merge

- Questions that are unique to a CAS
- Communicate more effectively with applicants
- Examples:
 - I plan to apply in...
 - I learned about the profession from...





Integration and Export Updates



New Integration Help Center

- Central repository for data integration and API content
- Great for users who use multiple Liaison products

Integration Help Center

Welcome to the Integration Help Center. Here you can access information about data integration in general, as well as API and integration information for Liaison's suite of products.

Any questions? Contact us for support.



Getting Started with
Data Integration, APIs,
and Connectors



CAS API



Enrollment Marketing
Platform Integrations



Liaison Outcomes API
and Integrations



SlideRoom API



TargetX Integrations



WebAdMIT API and
Integrations



Release Notes

<https://help.liaisonedu.com/Integration>

SFTP Delivery of Exports, Reports, and PDFs

- Schedule files from WebAdMIT to your institution's servers
- Learn more in-depth content in Working with WebAdMIT's Data Extraction Tools (tomorrow at 3 PM)

Export: States + 📅 ⌂ 🗑

Daily

Time	Destination	Next Run	Notifications	Actions
6:00 AM	(SFTP) SFTP Root and Path	Dec 1, 2022, 6:00 AM EST	E it@demo.org	✎ ⌂ 🗑

Weekly

Day	Time	Destination	Next Run	Notifications	Actions
Monday	3:00 AM	(SFTP) SFTP Root and Path	Dec 5, 2022, 3:00 AM EST	E ddirector@demo.org E it@demo.org	✎ ⌂ 🗑

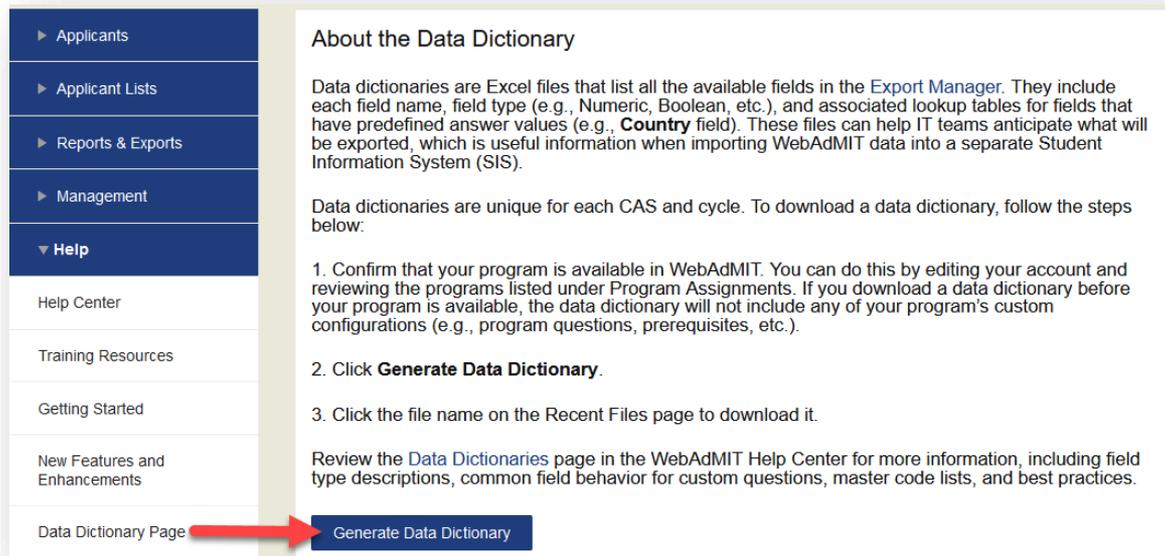
Monthly

Date	Time	Destination	Next Run	Notifications	Actions
1	1:00 AM	(SFTP) SFTP Root and Path	Dec 1, 2022, 1:00 AM EST	S E ddirector@demo.org	✎ ⌂ 🗑

Submit Changes Discard Changes

Custom Export Field Layout File Upgraded to Data Dictionary

- Lists metadata for all fields available in Export Manager and Report Manager
- Run on-demand



The screenshot shows a navigation menu on the left with the following items: Applicants, Applicant Lists, Reports & Exports, Management, Help (expanded), Help Center, Training Resources, Getting Started, New Features and Enhancements, and Data Dictionary Page. A red arrow points from the 'Data Dictionary Page' link to a blue button labeled 'Generate Data Dictionary' on the right side of the page.

About the Data Dictionary

Data dictionaries are Excel files that list all the available fields in the [Export Manager](#). They include each field name, field type (e.g., Numeric, Boolean, etc.), and associated lookup tables for fields that have predefined answer values (e.g., **Country** field). These files can help IT teams anticipate what will be exported, which is useful information when importing WebAdMIT data into a separate Student Information System (SIS).

Data dictionaries are unique for each CAS and cycle. To download a data dictionary, follow the steps below:

1. Confirm that your program is available in WebAdMIT. You can do this by editing your account and reviewing the programs listed under Program Assignments. If you download a data dictionary before your program is available, the data dictionary will not include any of your program's custom configurations (e.g., program questions, prerequisites, etc.).
2. Click **Generate Data Dictionary**.
3. Click the file name on the Recent Files page to download it.

Review the [Data Dictionaries](#) page in the WebAdMIT Help Center for more information, including field type descriptions, common field behavior for custom questions, master code lists, and best practices.

Last Exported/Printed Date Columns

- Last Exported/Printed Date Column for Export Manager and PDF Manager pages
- PDF Manager's Last Printed Date available on the Applicant Details Page
 - New for Applicant Uploaded Documents

Export Manager New Export

Export	Owner	List	Set Last Exported Date	Schedules	Show on Toolbar	Actions
Applicant States	dani@demo.edu	Regional Applicants	N	0	<input type="checkbox"/>	  

Documents

Applications (1) **Transcripts (2)** Applicant Uploaded Documents Application Level (0) Applicant Uploaded Documents Program Level (1)
Admissions Uploaded Documents (0)

Document	Source	Transcript Type	Received	Last Printed Date
 Transcript	Tennessee State University	Official	Oct 13 2022	Nov 16 2022
 Transcript	Belmont University	Official	Oct 03 2022	Nov 16 2022

Export and Report Updates

- Text Authorization, Phone Type, and Notes data added to partial view applicant exports
- Update to user report (adding cycle, CAS, Program (WebAdMIT) Label, Work Group, Institution Manager status)
- PDF download behavior changed

Shared Lookup Table Updates

- Updates to fields with predefined answer values (e.g., **County** and **Country** fields)
- Implemented twice a year
- Affects CAS application and other portals like:
 - WebAdMIT
 - CAS API
 - Liaison Outcomes
 - Analytics by Liaison

Shared Lookup Table Updates

Overview

Many fields in the Applicant Portal contain predefined answer values that applicants can select, for example, the **Country** and **County** fields both have predefined answer values. These values are housed in shared "lookup tables," which are viewable in your CAS's UNCAS's data dictionary file.

Periodically, we receive requests to update these lookup tables to include additional response options for some of the standard questions in the Applicant Portal. We strive to respond to these requests while acknowledging that some updates can potentially impact schools leveraging that data. For example, changes to the lookup tables are reflected in data dictionaries. You can use these updates to make changes to your settings for any data extractions, where needed. Portals impacted by lookup table changes include:

- **Analytics by Liaison:** a data reporting tool.
- **API:** a data integration tool.
- **Liaison Outcomes:** an admissions review system and CRM.
- **WebAdMIT:** an admissions review system.

As we update shared lookup tables, applicants will see these changes in the application. You can download updated data dictionary files that will help you if you export data from our portals to your school's Student Information System (SIS) or another database. See below for the timeline and guidance for optimal implementation.

Timeline

Updates to the shared lookup tables are released biannually in the spring and fall. You can submit lookup table change requests throughout the year to a member of your account team.

For the Fall 2023 lookup updates, review these important dates (note that they are subject to change):

- **June 15, 2023:** final date to submit lookup table value requests.
- **June 23, 2023:** new lookup table values finalized.
- **August 27, 2023:** new lookup table values appear in the Applicant Portal and updated data dictionaries are available.

Changes to Applicant Portal Lookup Tables

Coming soon!

Where New Lookup Table Values Appear

On **August 27, 2023**, applicants can select the new options in the application. Once the new lookup table values become available to applicants, they're reflected in the applicant's profile, within the application PDF, and in our products (e.g., **Analytics by Liaison**, **API**, **Liaison Outcomes**, and **WebAdMIT**).

Changes to the Data Dictionaries and Master Code Lists

When new lookup table values are released, you should download a new data dictionary, which will contain the new lookup table values that correspond to the **Changes to Applicant Portal Lookup Tables**.

Data dictionaries are Excel files that list all the application fields you can search by or export from our products. They include each field name, field type (e.g., numeric, Boolean, etc.), and associated lookup tables. These files can help Information Technology (IT) teams anticipate what will be exported, which is useful information when importing applicant data into a separate Student Information System (SIS).

For **WebAdMIT**, you can also access the **Master Code Lists** for college, degree, and high school data. These master code lists include all the possible values for the select data, but due to the number of possible values, they are stored separately from the standard data dictionary. Additionally, these **Master Code Lists** are updated once a year in the spring.

If your school imports these fields directly from our system to yours, these new options will begin appearing in your exports as applicants select them. If you currently export data from our portals to your school's SIS or another database, share these new lookup table values and data dictionaries with your IT team. Additionally, if you created a "crosswalk" from our portals to your local data in your SIS/CRM, you may need to update this crosswalk for the newly added options.

To access a product's data dictionary:

- **Analytics by Liaison:** not applicable.
- **CAS API:** use the data dictionary API endpoint.
- **Liaison Outcomes:** under the Import/Export section in the Settings menu, click **Field Dictionary** to view the fields available in Outcomes.
- **WebAdMIT:** under the Help panel in the Menu Bar, click **Data Dictionary Page** to generate a new data dictionary. You can also download **Master Code Lists**.

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- Overview
- Timeline
- Changes to Applicant Portal Lookup Tables
- Where New Lookup Table Values Appear
- Changes to the Data Dictionaries and Master Code Lists



Need help with new features?

- Review the release notes
- Check out the WebAdMIT Help Center
- Contact the Client Support Specialist team at:
 - webadmitsupport@liaisonedu.com
 - 857-304-2020

Liaison Academy

***Mission:** foster excellence in admissions through the production and dissemination of information and knowledge.*

Your time is important!

Use Liaison Academy to:

- Quickly access all Liaison product resources
- Learn more about Liaison's products
- Educate and train staff who join your team

 Register at learn.liaisonedu.com

Create an account to access:

- Live training events
- Onboarding toolkits
- On-demand eLearning courses
- Product learning paths
- Professional development workshops
- Training videos
- Webinars

A diverse group of people in a modern office setting. A woman in the foreground is raising her hand, smiling. Other people are visible in the background, some looking towards the camera and others looking away. The overall atmosphere is positive and professional.

Q&A

The logo for the Liaison CAS experience. It features a stylized graphic of a cluster of dots in white and yellow on the left. To the right of the graphic, the text reads "LIAISON" in a small, white, sans-serif font, "CAS" in a large, bold, yellow, sans-serif font, "experience" in a smaller, white, sans-serif font, and "JULY 24-25 2023" and "CHICAGO, IL" in a small, white, sans-serif font stacked vertically.

LIAISON
CAS
experience
JULY 24-25 2023
CHICAGO, IL

Thank You

Liaison Academy
Education & Knowledge Team
academy@liaisionedu.com