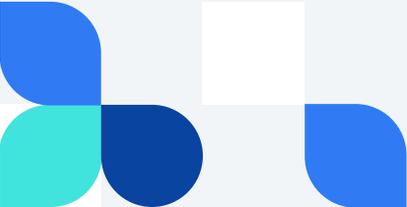




# SchoolMint Enroll



## Reports Webinar



# Agenda

Today we'll be learning about SchoolMint Enroll report tips, tricks, best practices, and new features!

- Utilizing Report Categories
- Using the Form Field Download
- Understanding the Data Model
- Common Columns
- Common Filters
- Extras:
  - Seat Tracker
  - Standard Reports (2.2)

# Logistics



Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A at the end

- Ask general questions throughout by clicking **Q&A**
- Send site specific questions to [schoolmint.zendesk.com](https://schoolmint.zendesk.com)

Survey at the end

# Reports Module



Reports are accessed by selecting the Reports module tab.

This will take you to the report dashboard where all reports available based on user permissions will appear.

Enroll Videos | Reports: SY 2021-2022

Caitlin Mayer | 2021-2022

SchoolMintEnroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Reports: SY 2021-2022

Manage Report Categories Add New Report

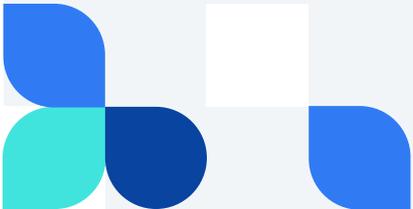
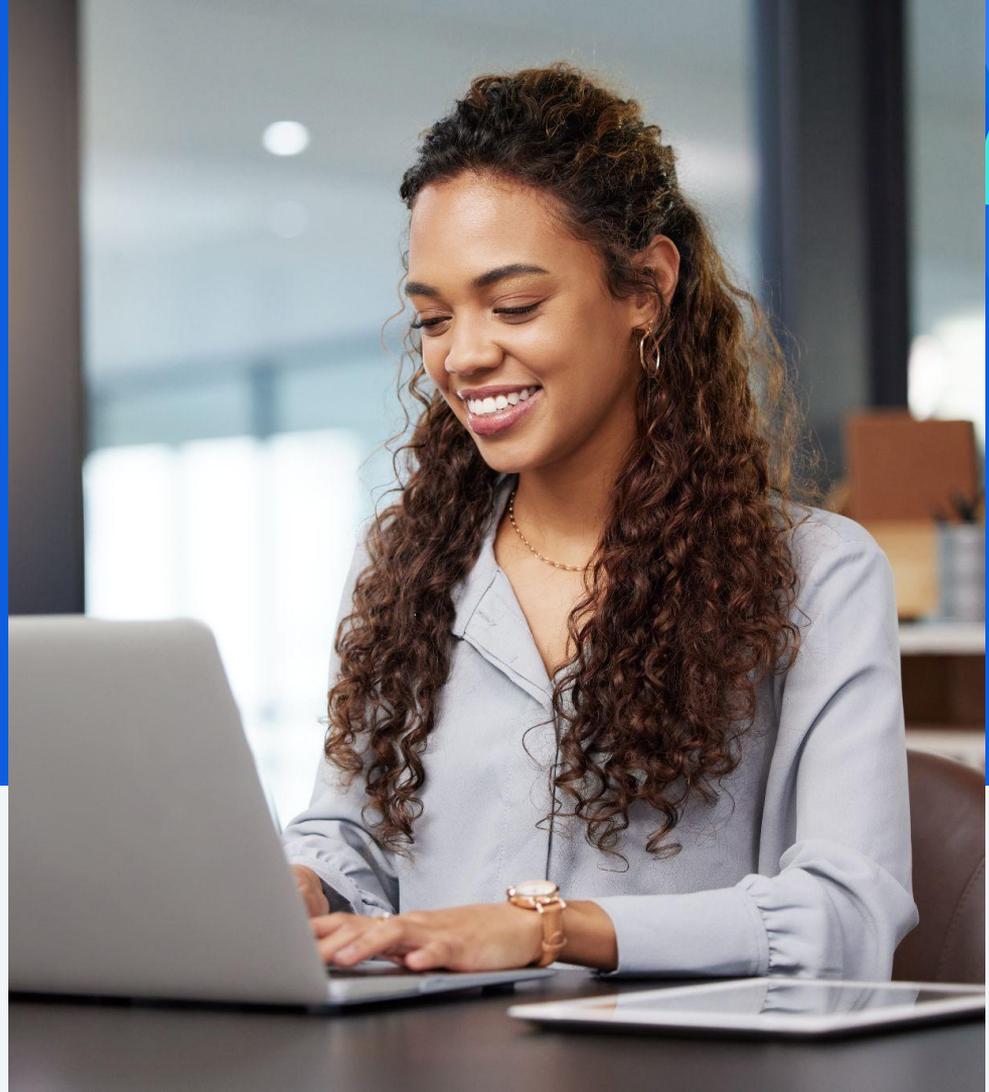
Applications

Other Reports

Search

★	Report Name	Access	Date Created	Actions
<input type="checkbox"/>	1 Full Application Report	Selected Programs	11/03/2021 03:20 PM	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Run Report
<input type="checkbox"/>	1 Milk Way Elementary Application Report	Full Globally Available to All Users	11/03/2021 11:14 AM	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Run Report
<input type="checkbox"/>	1 Withdrawn Applications	Private Report	11/03/2021 11:36 AM	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Run Report

# Report Module Features



## Add New Report

Search

Actions

Run View

Run View

Report History

Application Data for Open Enrollment Programs

Up to 20 snapshots available.

Bulk Actions

Access	Created By	Ran On	Actions
<input type="checkbox"/> Globally Available to All Users	Emily Carlson	2023-12-01 11:16:56	View

**Add New Report** - Create a new report.

**Search** - Use the Search field on the right side of the page to look up an existing report from the selected category.

**Edit an Existing Report** - From the Actions column, click Edit (pencil icon) to modify the report.

**Delete an Existing Report** - From the Actions column, click Delete (trashcan icon) to remove the report in entirety

**Duplicate an Existing Report** - From the Actions column, click Duplicate (two pieces of paper icon). Then, name and save the new report.

**Run an Existing Report** - From the Actions column, click “Run”. This will run the report with current data based on the filters, layout, and detail used during the last save by you or other administrators with access to edit the report.

**View a Report Snapshot** - From the Actions column, click View to display the last report snapshot.

**Report History** - See up to 20 previous snapshots of your report

# Report Best Practices



# Organize Your Reports with Report Categories

Manage Report Categories

Click "Manage Report Categories" from the Reports Dashboard

You will be rerouted to Settings>Custom Data>Manage Report Categories. From here you can manage the existing categories, or add new ones

## Manage Report Categories

Add New Category

Add, edit, and delete report categories.

Sort	Category Name	Actions
≡	Applications	 
≡	Registrations	 

Data Model \* 

Appeals

Application

Event Programs

Event Sessions  
This record contains fields that cannot be linked with the previously selected field(s).

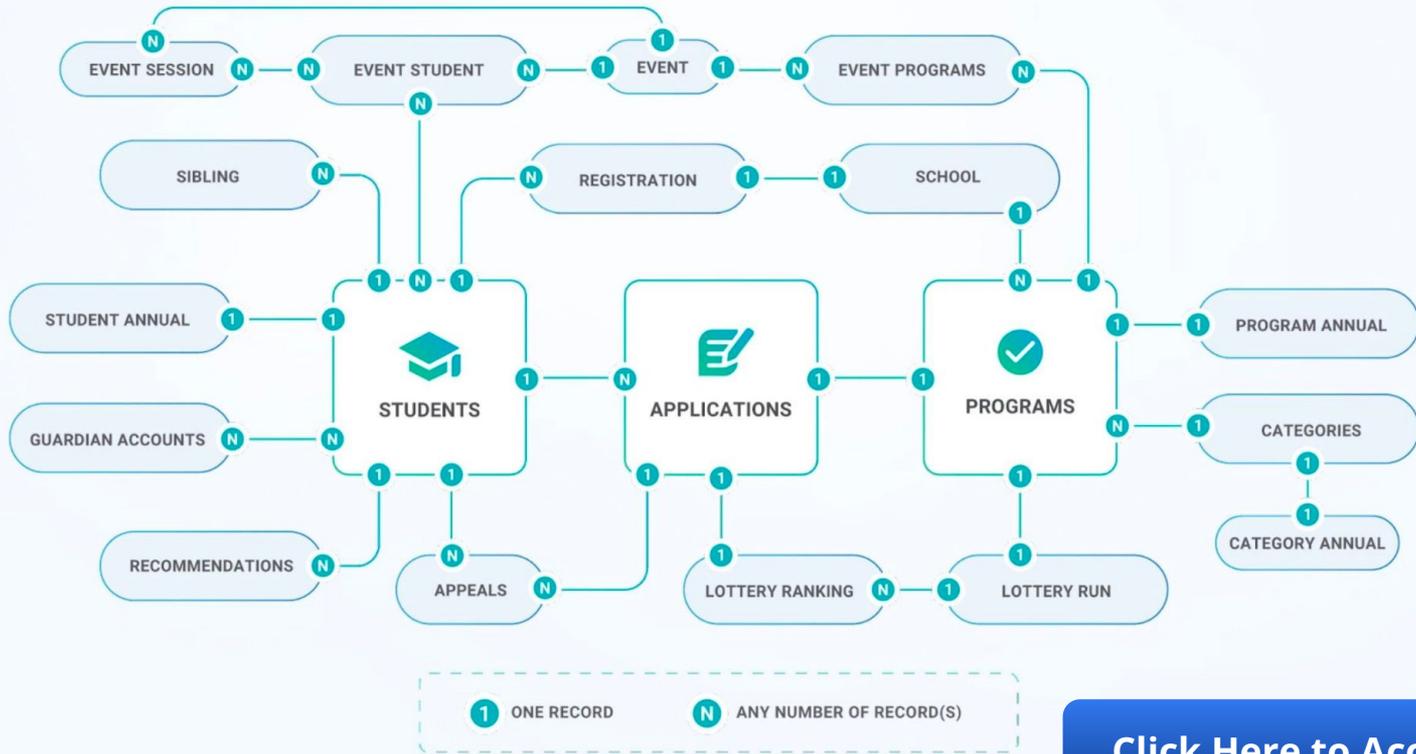
Event Students

Events  
This record contains fields that cannot be linked with the previously selected field(s).

# Understanding the Data Model Matrix

## You may have also noticed that certain data models aren't always available

- This is because certain data categories can't be accessed until we have data from other categories
- For example: we can't pull **sibling** data until we are pulling **student** data.



[Click Here to Access!](#)

# Report Tips

# Common Report Columns

## Student

- id
- student\_district\_id
- fname
- lname
- dob

## Student Annual

- grade
- guardian1\_fname
- guardian1\_lname
- guardian1\_email
- guardian1\_phone
- school\_previous\_id
- address, address2, city, state, zip

## Program (for applications)

- title

## School (for registrations)

- school\_name

## Application

- submitted
- submitted\_timestamp
- status

## Lottery Ranking

- lottery\_list
- accepted

## Registration

- submitted
- submitted\_timestamp
- status

# Conditions

We have premade filter formats that make it easy for you to select exactly what criteria students need in order to be included in the report.

## Add Filters

Match **ANY**  **ALL**  of the following conditions

Add Condition ▼

- Simple Lookup
- Field Comparison
- Student Address
- Grades
- Student In Current School
- Student Continues Feeder Path
- Programs



# Using Conditions

- **Student Address** - can pull if a student address is **INSIDE** or **OUTSIDE** a specific boundary or zone
- **Grade** - can pull if a student is **IN** or **NOT IN** specific grade(s)
- **Student In Current School** - can pull if a student is **CONTINUING** or **NOT CONTINUING** at their previous school
- **Student Continues Feeder Path** - can pull if a student is **CONTINUING** or **NOT CONTINUING** in their feeder path
- **Programs** - can pull if a student **IS** or **IS NOT** in specific program(s)

# Common Simple Lookup Filters

Most of our standard filters will use a number value of 1, 0, or -1 to determine the status of a field.

## Example:

**Submitted IS 1** - this means that the form process WAS submitted

**Withdrawn IS 0** - this means that the form was NOT withdrawn

**Status IS NOT -1** - this means that the form status is NOT still In Processing

## Other Common Filters

**[Field Name] IS EMPTY** - this will pull students who are MISSING data for that field

**[Field Name] HAS VALUE** - this will pull students who are NOT missing data for that field

# Scenario:

**“When I build reports, I get so confused about what data model, field name, or value to use!”**



# Trick: Form Field Download

Settings >> Forms >>

 **Form Field Download**

This generates a CSV file of all your report fields' data, that you can then open in Excel, Sheets, Numbers, etc.

You can use filters to search for the field you are wanting to use, as well as what data model and values are connected to it!



# Enroll v2 Report Updates

# Seat Tracker

**Seat Tracker** calculates the seats available in your school programs by grade level based on numbers you input for capacity, returning students, and lottery seats filled.

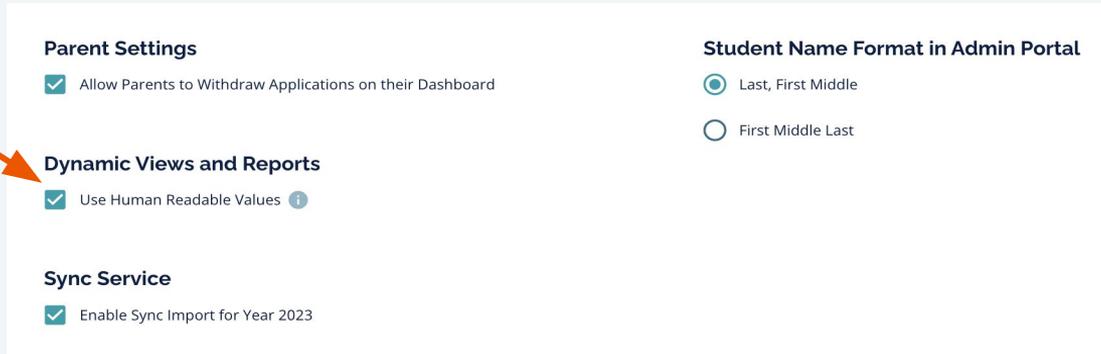
The **Seat Availability Report** uses data from Seat Tracker to give you a holistic view of seat availability in your district by school, program, and grade level.

Seat availability can be **displayed to guardians** during the application process and in SchoolFinder so families can view seat availability when searching for school programs.

[Click Here to Learn More!](#)

# Human Readable Values

The **Human Readable Value** enablement option displays words in place of numbers for default fields such as status on both your Dynamic Views as well as Reports. You can enable this in **Settings >> General**



The screenshot shows a settings interface with three sections: 'Parent Settings', 'Dynamic Views and Reports', and 'Sync Service'. An orange arrow points to the 'Use Human Readable Values' checkbox, which is checked. To the right, the 'Student Name Format in Admin Portal' section shows 'Last, First Middle' selected with a radio button.

Section	Setting	Status
Parent Settings	Allow Parents to Withdraw Applications on their Dashboard	Checked
	Dynamic Views and Reports	
	Use Human Readable Values ⓘ	Checked
Sync Service	Enable Sync Import for Year 2023	Checked

**Student Name Format in Admin Portal**

- Last, First Middle
- First Middle Last

[Click Here to Learn More!](#)

# New Standard Reports and Data Models (Upcoming)

A **Standard Report** is a pre-built type of report that's available to orgs out-of-the-box. These reports can include fields and formats that are not available in the report builder such as charts, graphs, etc.

**Over time, more Standard Report types will be added based on the most common requests and high-priority needs.**

We are also adding the following new Data Models:

- School - Previous
- School - Zoned (Neighborhood)
- School - Applying Program
- School - Registering

[Click Here to Learn More!](#)

- Workflow Notifications
- Lottery priority names displayed on the application table
- Fields from the Lottery Rankings table available for saved views on the application table
- Ability to bulk update application settings for programs
- Notify Guardian option when admin accepts/declines a lottery placement on behalf of the family
- Clickable links on Students and Lotteries screens for improved navigation
- User Group restrictions to hide a form step or set it as view only
- Exclude weekends option at the program level for auto-decline/offer expiration
- Calculated fields allows for three decimal places
- New standard report: Application Count by Ranked Choice
- New data models added to report builder
- New fields added to Skyward API

**Enroll 2.2  
Release on  
Wednesday,  
December 13 at  
7pm Central**

**Zendesk**

**Help Articles**

**Webinar Recordings and Slide Decks**

**Issues, Bugs, and General Q&As**

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

# Q & A



# Questions & Answers Pt 1

- Can I restrict my reports to be where only certain user groups would have access to that information?
  - **Yes! This can be managed when editing a report under Access Settings**

Share with User Groups and/or Programs

Share with these user groups:                      Share with admins of these program(s)

All User Groups                       All Schools/Programs

- Can I edit the order of my columns on reports?
  - **Yes! You can rearrange columns by holding, dragging, and dropping them to a new location**
- For Standard Reports, will we have the ability to sort the columns?
  - **There is no ability to manipulate / sort standard reports, only use the filters above the report**

# Questions & Answers Pt 2

- When can we expect the Users data model to be available on reports?
  - **At the time, we have no ETA on adding Users data model to reports. We've submitted this request to the product team!**
- Where can I access zendesk?
  - **You can access Enroll's Zendesk at <https://schoolmint.zendesk.com>**
- How do you get to the Customer Forum?
  - **You can go to Zendesk using the link above, then click Customer Forum in the Community Segment**

## The Community

Our community is the best place to collaborate with your peers and Schoolmint experts. Find everything from recommendations to feature ideas here!

### Customer Forum

Share best practices for using SchoolMint Enroll, ask questions, and learn from others!

### Feature Requests

Have an idea or a request for a new feature or enhancement? Add it here!

### Product Research

Help us get input on things we're currently designing via surveys and feedback groups!



**Thank You**

