



SchoolMint Enroll



**A Beginner's Guide to SchoolMint Enroll:
Saved Views & Reports**

Welcome to the Summer Series!



Get ready for a sunny journey through our Enroll platform ☀️ We're hosting a bi-weekly webinar series from June 11 to Aug 1, designed to help new admins or admins who want a platform refresher to navigate with ease in the upcoming year.

Each week will dive into a specific topic, making your learning experience a refreshing cool summer breeze 🌴 Plus, every registrant has a chance to win an exciting giveaway at the end of the series! 🎉 Stick around until the end for an opportunity to snag extra entries!



Meet the Hosts



Alexis Robin
Sr. Professional Services Specialist
Presenter



Amy Chauvin
Lead Implementation Specialist
Q&A

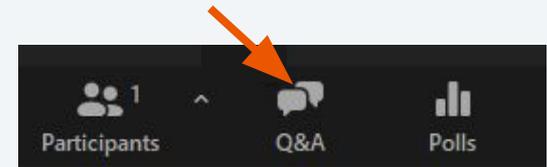
Logistics



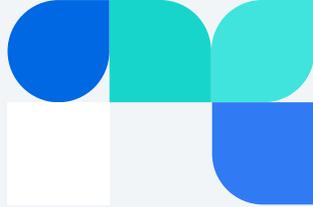
Slides, recording, and related resources will be shared in the follow up email tomorrow

Live Q&A throughout:

- Ask webinar related questions by clicking **Q&A**
- Send site-specific questions to schoolmint.zendesk.com



Two Surveys at the end



Agenda

- How to Find Fields
- Types of Records
- Learn to use the filters engine
- Common Columns
- Common Filters

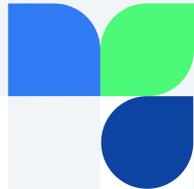




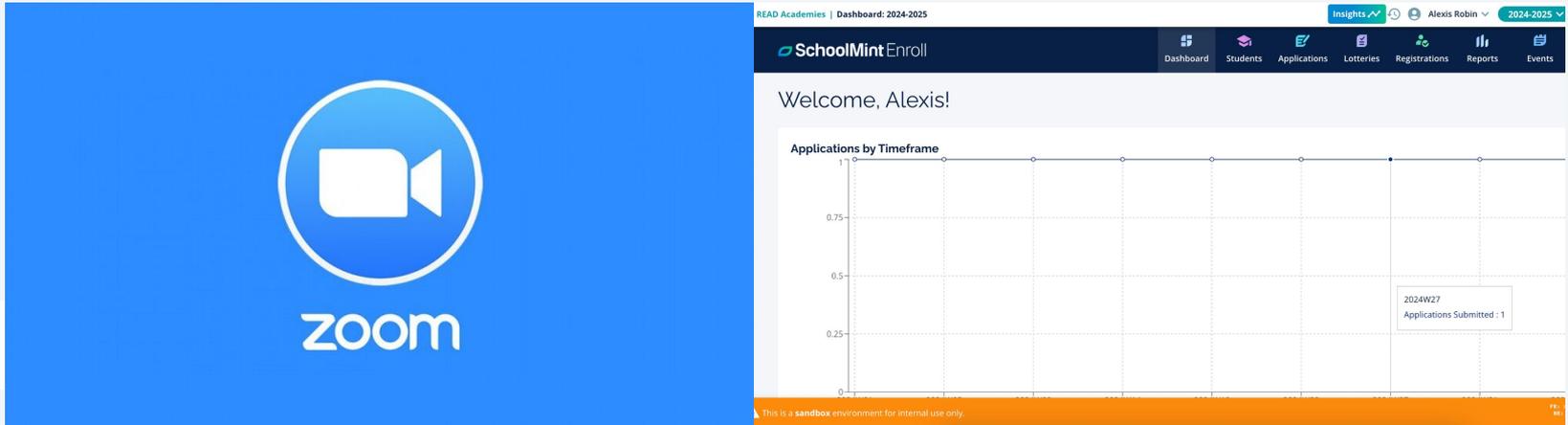
Do Now

Let's get started:

1. Navigate to **{domain}.schoolmint.com/manage** and **login**
2. Bookmark **Enroll**
3. Setup your Virtual Space



Setting up your virtual space



The image shows a screenshot of the SchoolMintEnroll dashboard. On the left, there is a large blue square containing the Zoom logo. The dashboard itself is titled 'READ Academies | Dashboard: 2024-2025' and 'SchoolMintEnroll'. The user is identified as 'Alexis Robin' for the '2024-2025' year. The dashboard includes a navigation menu with options: Dashboard, Students, Applications, Lotteries, Registrations, Reports, and Events. The main content area displays a 'Welcome, Alexis!' message and a line chart titled 'Applications by Timeframe'. The chart shows a single data point for '2024W27' with 'Applications Submitted: 1'. At the bottom of the dashboard, there is a note: 'This is a sandbox environment for internal use only.' The SchoolMint logo is visible in the bottom left corner of the overall image.

READ Academies | Dashboard: 2024-2025

Insights ✓ Alex Robin 2024-2025

SchoolMintEnroll

Dashboard Students Applications Lotteries Registrations Reports Events

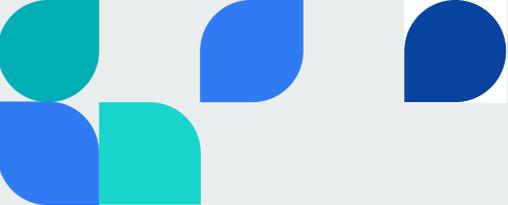
Welcome, Alexis!

Applications by Timeframe

Timeframe	Applications Submitted
2024W27	1

This is a sandbox environment for internal use only.

SchoolMint.



Poll: What are some Saved Views or Reports that you are currently using (or would like to use) that benefit your processes?

Transportation

Enrollment Checklist

**Recommendation
Reports**

Quick Tips to Get Started



Form Field Download

Settings >> Forms >>

 **Form Field Download**

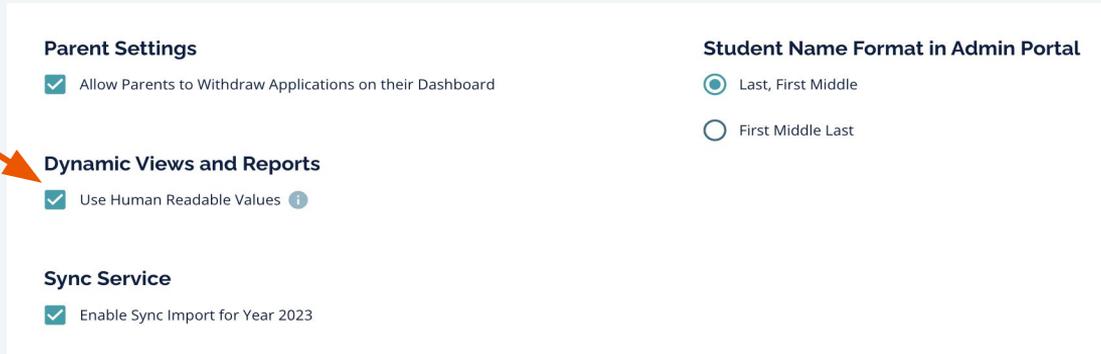
This generates a CSV file of all your report fields' data, that you can then open in Excel, Sheets, Numbers, etc.

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!



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 panel with four sections:

- Parent Settings**
 - Allow Parents to Withdraw Applications on their Dashboard
- Dynamic Views and Reports**
 - Use Human Readable Values ⓘ
- Sync Service**
 - Enable Sync Import for Year 2023
- Student Name Format in Admin Portal**
 - Last, First Middle
 - First Middle Last

An orange arrow points to the 'Use Human Readable Values' checkbox.

[Click Here to Learn More!](#)

Common Tables and Fields

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
- school_code

Application

- id
- choice_rank
- submitted
- submitted_timestamp
- status
- withdrawn
- withdrawn_reason

Lottery Ranking

- lottery_list
- accepted
- accepted_declined_by
- rank_adjusted
- timestamp_expire

Registration

- id
- submitted
- submitted_timestamp
- status
- withdrawn
- withdrawn_reason

Example Filter

Add Filters



Select a field and enter the value(s) you would like to filter this list by:

Match ANY ALL of the following conditions

Select Field

student.gender

Operator

IS

Expected Value

Female



Add Condition

Cancel

Apply Filters

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

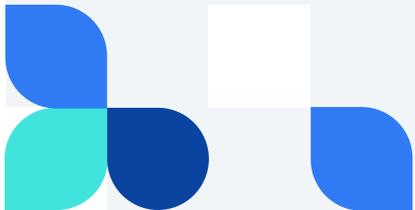
Status IS NOT -1 - this means that the form status is NOT still In Processing

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

Saved Views



Custom Filters

If you need to filter for specific criteria that is not included in your quick filters, you can use the Add Filters option to create your own filters

Common Custom Filters

- ★ Upload field IS EMPTY or HAS VALUE
- ★ Demographic Data
- ★ Language Data
- ★ Student Statuses

Apply Saved View  Add Filters Save View

Select a field and enter the value(s) you would like to filter this list by:

Match ANY ALL of the following conditions

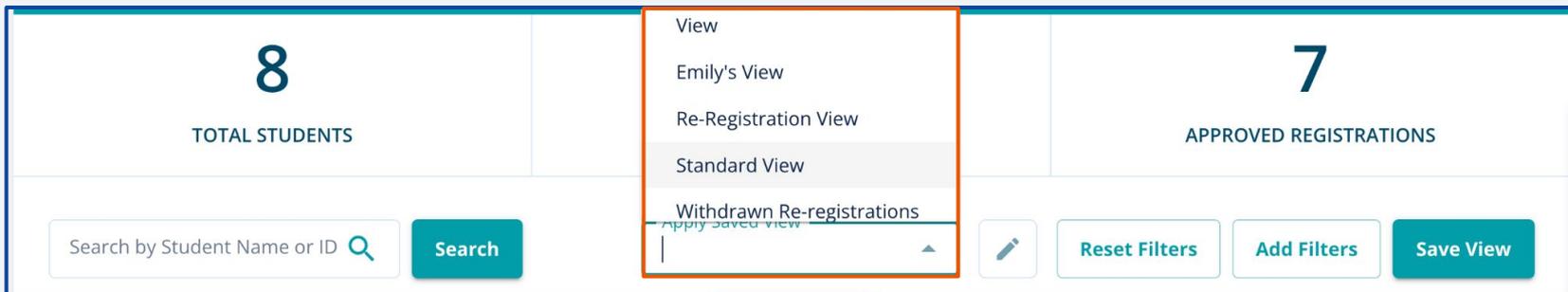
Select Field	Operator	Expected Value
student_annual.residence_t... ▼	IS NOT ▼	PermanentResidence ✕

Cancel

Apply Filters

Saved Views

You can also create your own dynamic views in many of SchoolMint Enroll's modules. These views can be kept private or shared globally with your organization. To create a Saved View, add your desired filters, and then click Save View!



[Click Here: Create Dynamic Views](#)

Saved Views: Use These Saved Views for Your Site

- ★ **Withdrawn Forms**
- ★ **Lottery Status**
- ★ **Contact Information**
- ★ **Deliverables**



=

lottery_list

lottery_list



=

Lottery Status

accepted



=

accepted_declined_by

accepted_declined_by



=

Lottery Placement

rank_adjusted



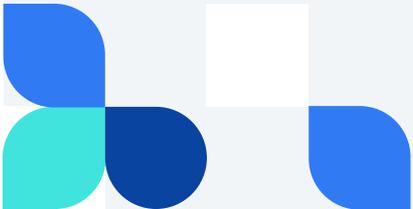
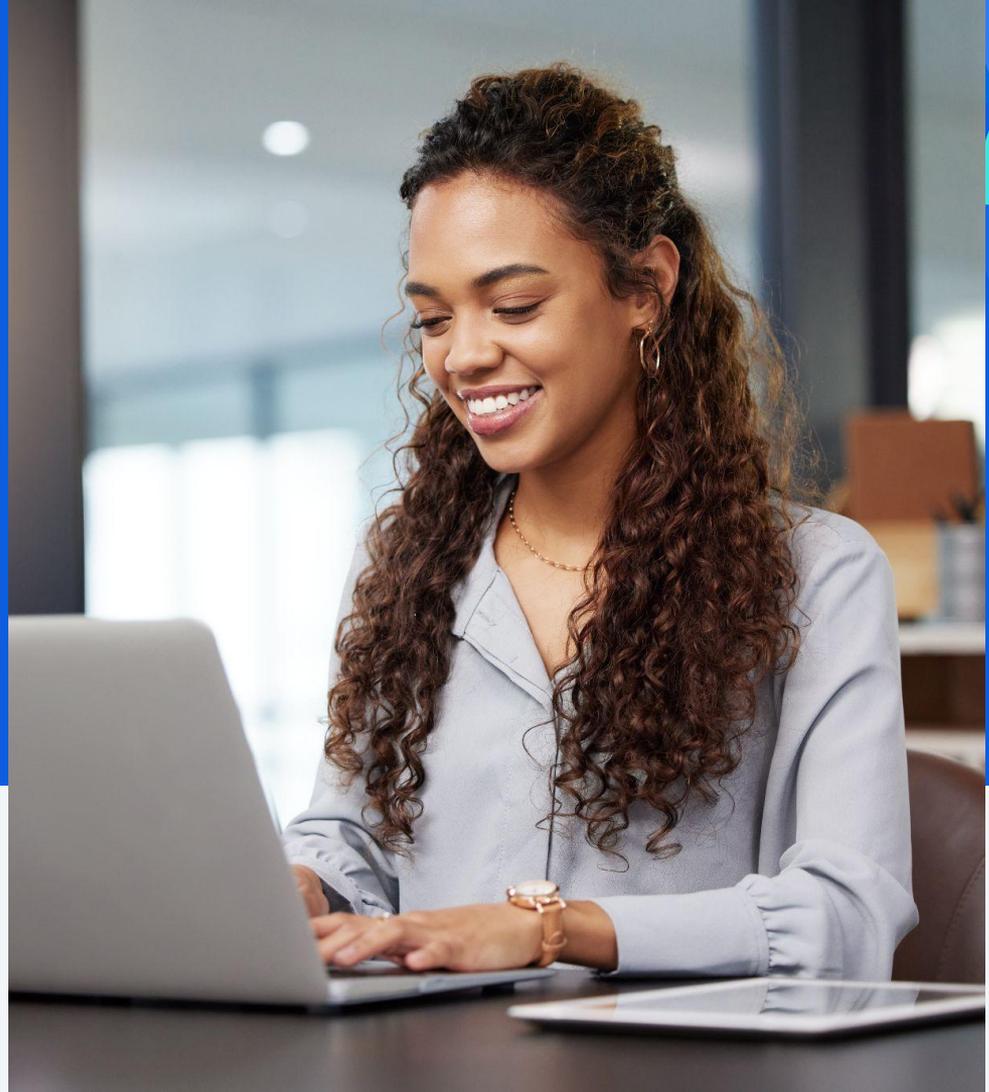
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Offer Deadline

timestamp_expire



Reports



Reports Module



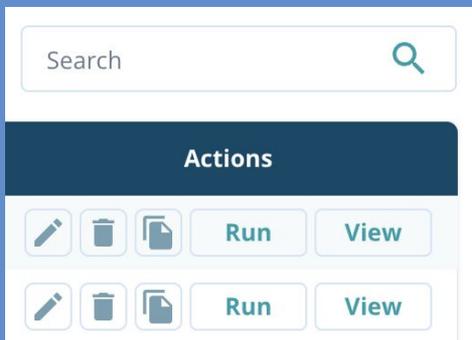
Reports are accessed by selecting the Reports module tab.

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

The screenshot shows the SchoolMintEnroll interface. At the top, there's a header with 'Enroll Videos | Reports: SY 2021-2022' and user information 'Caitlin Mayer' for '2021-2022'. Below the header is a navigation bar with icons for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main content area is titled 'Reports: SY 2021-2022' and has two buttons: 'Manage Report Categories' and 'Add New Report'. On the left, there are two tabs: 'Applications' (selected) and 'Other Reports'. The main area displays a table of reports under the heading 'Applications'.

★	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

Add New Report



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

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).

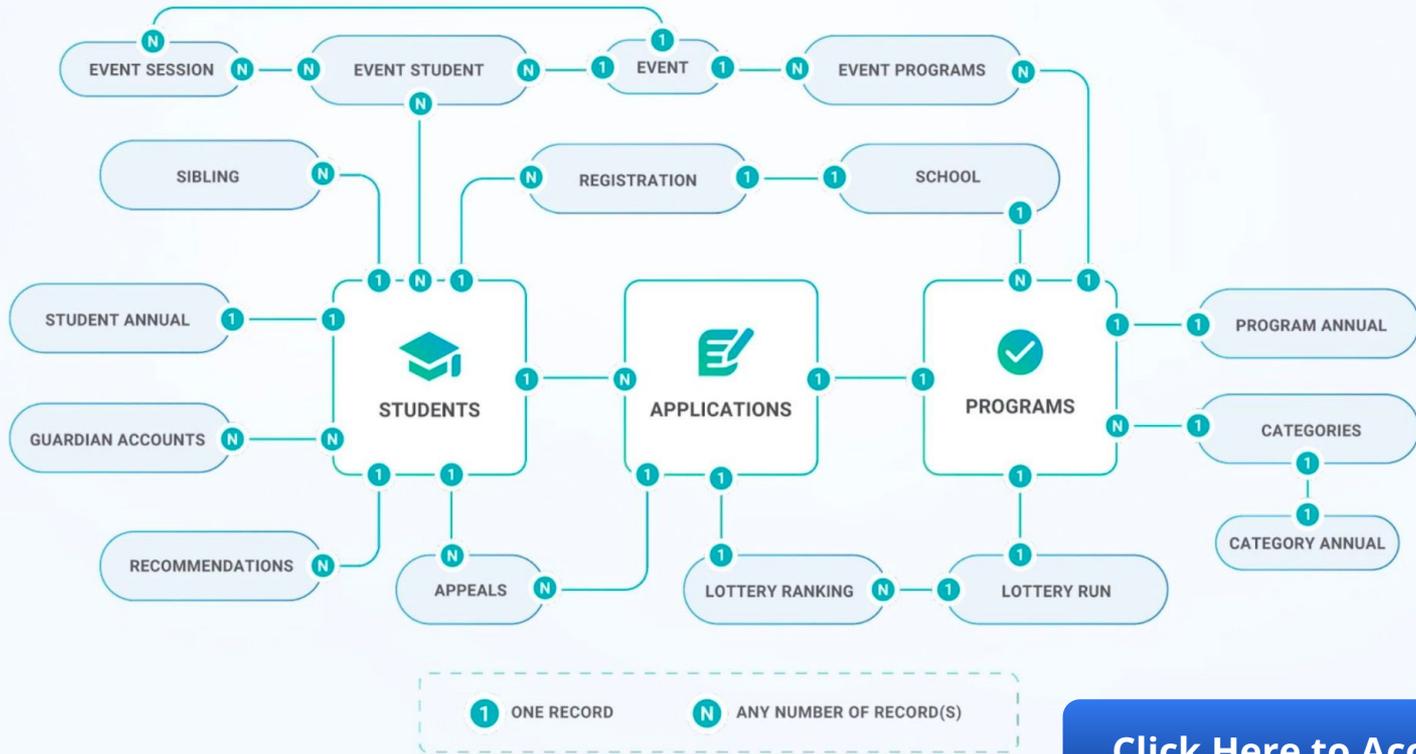
Event Students

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!](#)

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!](#)

Report Tips

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

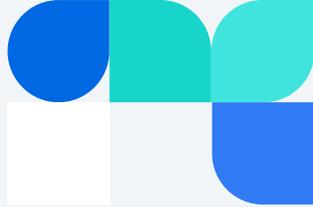
Add Condition ▼

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



Using Conditions

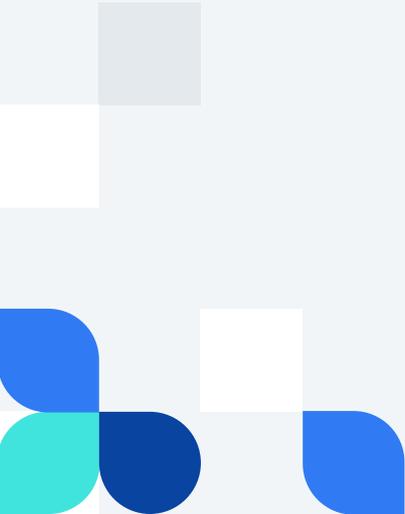
- **Student Address** - can pull if a student address is INSIDE or OUTSIDE a specific boundary or zone
- **Grade** - can pull if a student is IN or NOT IN specific grade(s)
- **Student In Current School** - can pull if a student is CONTINUING or NOT CONTINUING at their previous school
- **Student Continues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



Standard Reports

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.



[Click Here to Learn More!](#)

Zendesk

Help Articles

Webinar Recordings and Slide Decks

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Resources

Summer Webinar Series

A Beginner's Guide to SchoolMint Enroll

We are excited to announce a comprehensive webinar series designed to equip new administrators with the fundamental skills needed to effectively navigate and manage their SchoolMint Enroll platforms. This series will be hosted every other week from **June 11 - August 1**, each week focusing on a single topic.

- ~~Week 1: Form Building~~
- ~~Week 2: Application 101~~
- ~~Week 3: Saved Views and Reports~~
- **Week 4: Communications**

[Click Here to Register](#)

A photograph of several students in a classroom, overlaid with a blue and green gradient. The students are focused on their work, with one student in the foreground smiling while writing in a notebook. The text 'Extra Entry Opportunity' is centered over the image in a large, white, sans-serif font.

Extra Entry Opportunity



Homework:

Join the Discussion on Seamless School Applications and Enrollment!

1. Go to the [Zendesk Portal](#).
2. Find the **Community** section
3. Select [Customer Forum](#).
4. Look for the post titled "**Tips and Tricks for Seamless School Applications and Enrollment**".

Share your insights and learn from fellow admins!

Q&A

Survey



bit.ly/3XS2YLH

Q&A

Q: My form field download didn't pull up a field values table

A: The form field download should have 2 files that will pull in the zip file - one for the form field download, and one for the values. In the example I used for the webinar, I had created a Google Sheet, and imported my form field download in one tab, and imported field values in the second tab!



Thank You

