



SchoolMint Enroll



Reports Webinar



Meet the Hosts



Alexis Robin
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Presenter



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Q&A





Agenda

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

- Reviewing Report Features
- Utilizing Report Categories
- Seat Tracker
- Using the Form Field Download

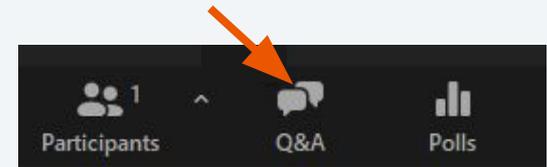
Logistics



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

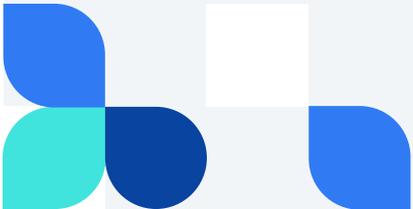
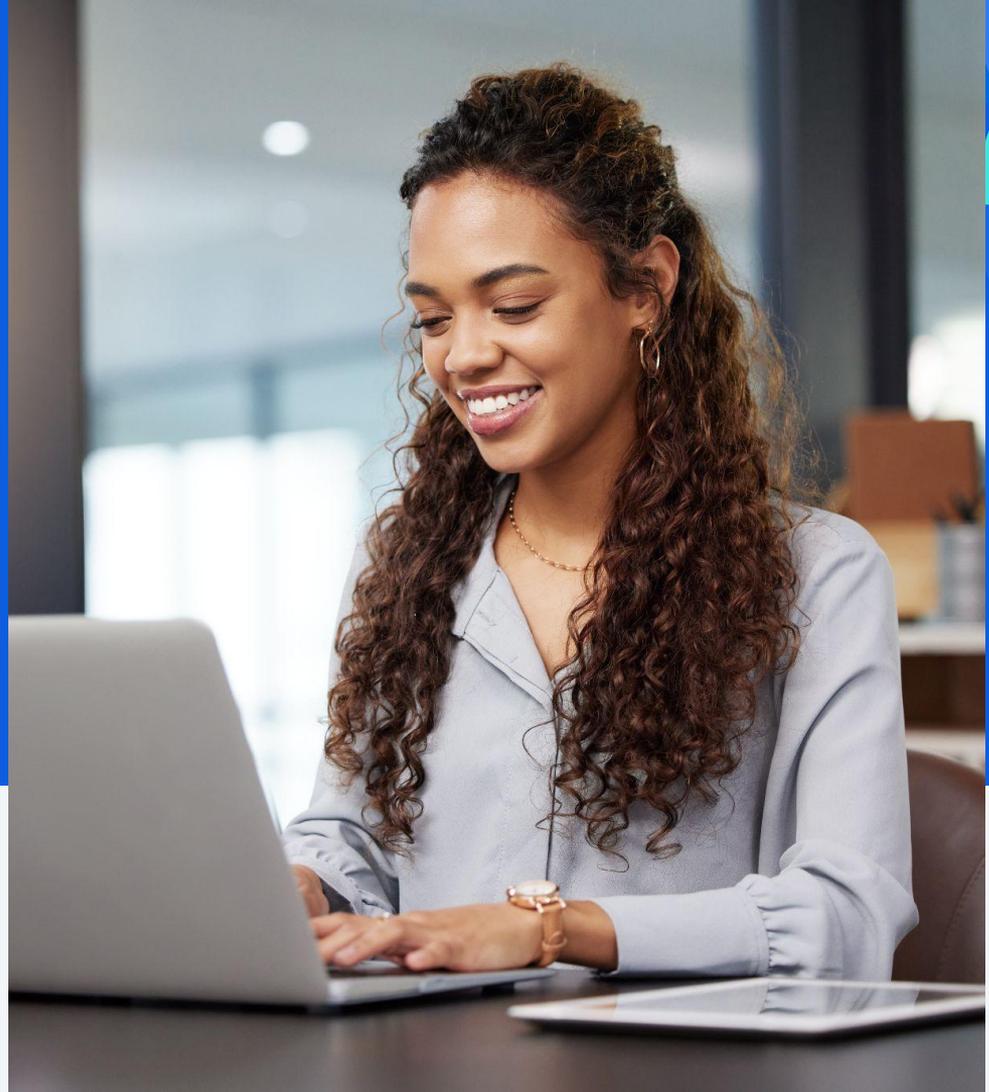
Live Q&A throughout:

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



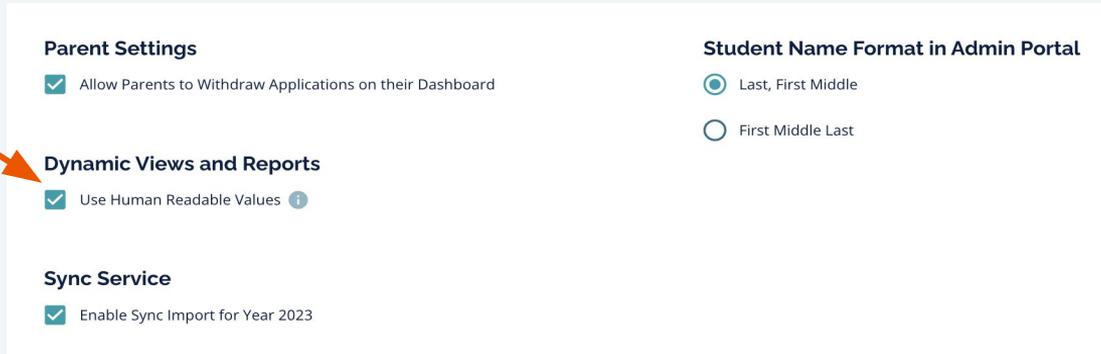
Two Surveys at the end

Report Module Features



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!](#)

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

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	 

Favorite your most used reports for easy access

★	Report Name	Access
★	Application Data for Op...	Globally Available to All...
★	Application for Transfe...	Globally Available to All...

Click the star ★ next to the report on the dashboard

Now, when you access your reports dashboard, your first screen will be your Favorited reports!

Reports: 2024-2025 Manage Report Categories Add New Report

★ Favorite Reports

Standard Reports ▲

Application Count By Rank...

TEA Reports

Application Reports

Registration Reports

Favorite Reports

Search

★	Report Name	Access	Created By	Created At	Last Run	Actions
★	Application Data for Op...	Globally Available to All...	Emily Carlson	10/25/2022 02:50 PM	10/02/2024 12:	Run View
★	Application for Transfe...	Globally Available to All...	Emily Carlson	10/27/2022 09:56 AM	01/25/2023 03:	Run View
★	Default TEA	Globally Available to All...	System	07/16/2024 10:41 PM		Run View
★	PreK Program Applicati...	Globally Available to All...	Emily Carlson	12/12/2022 06:10 AM		Run View

Seat Tracker

Reports: 2021-2022

Seat Tracker is located in the Reports area

Other Reports

Seat Tracker

To manage Seat Tracker numbers click Seat Tracker.

East West Middle

East West Middle - Dual Language - Choice Schools

Grade	Capacity 	Returning Students 	Lottery Seats Filled 	Seats Available 	Lottery Cutoff 
5	2	0	0	2	1
6	2	2	1	-1	3
7	1	0	0	1	4
Total	5	2	1	2	8

East West Middle

East WestMiddle - Neighborhood Schools

Grade	Capacity 	Returning Students 	Lottery Seats Filled 	Seats Available 	Lottery Cutoff 
5	1	0	0	1	6
6	1	0	0	1	5
7	1	0	0	1	4
8	2	0	0	2	6
Total	5	0	0	5	21

Seat Tracker - Manage Guardian View (Individual Program)

Guardian View

Configure how guardians will see Seat Availability for the program(s) they are applying to by clicking the Guardian View button in Seat Tracker.

Programs can be configured individually using the "Seat Availability: Guardian View" button on the Program Information tab.

East WestMiddle: Edit

Cancel Save Program

PROGRAM INFOR... PROGRAM ELIGIBI... APPLICATION SETT... LOTTERY SETTINGS SCHOOLFINDER

School*
East West Middle

Notification Email

Program Name*
East WestMiddle

Program Abbreviation
EW

Program Category*
Neighborhood Schools

Program Enabled

Seat Tracker Settings

Seat Availability: Guardian View

Seat Availability Settings

Guardian View

Hide seat availability

Display actual number of seats available

Display seat availability as a range

When there are or less open seats, show as: No Seats Available

When there are or less open seats, show as: Limited Seats Available

Any Open Seats number higher than the number set above will show as: Seats Available

Cancel Save Open Seat Settings

Seat Tracker - Examples of Each Guardian View

Choice Schools

East West - IB Program

● 6 Seats Available

East West International Baccalaureate allows students to thrive and grow through a challenging curriculum.

Students can expect:

- High quality programmes of education, which support development of knowledgeable and inquiring students
- A worldwide network of highly respected IB World Schools, working together to share best practice.

To learn more about our program please visit our [website](#).

East West Middle - Dual Language

● No Seats Available

East West Dual Language - Ice on parole française!

Neighborhood Schools

East WestMiddle

East West Middle - Home of the Tigers!

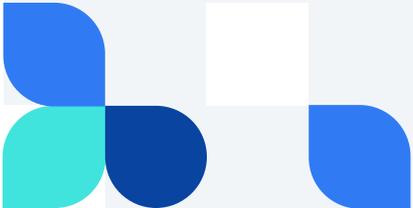
Show Less ^

Display Actual Number

Display a Range

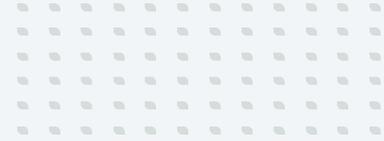
Hide Seat Availability

Report Builder



Report Settings

Set your report name, category, description, and access settings.



General Information

Report Name *

Demo Report

Report Categories

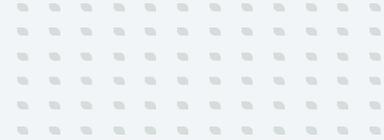
Description

Access Settings

- Private Report (only accessible to you)
- Globally Available to All Users
- Share with User Groups and/or Programs

Report Columns

Reports are in a table column format. Choose what columns you would like to include in your report by selecting the record and field name. You can also set your own column name, order, and sorting column.



+

Continue by adding a field to your report

Sort Report Data by:
Select Field
students.Iname

Ascending Descending

Manage Fields/Columns:

Order	Data Model	Field	Label	Actions
=	Application	id	Application ID	 
=	Students	Iname	Student Last Name	 

Add or Edit Field

1. Use the menus below to find and select a field to display in this report.

Data Model * Select Field *

2. How would you like this field labeled in the report?

Field Label *

Cancel

Report Filters

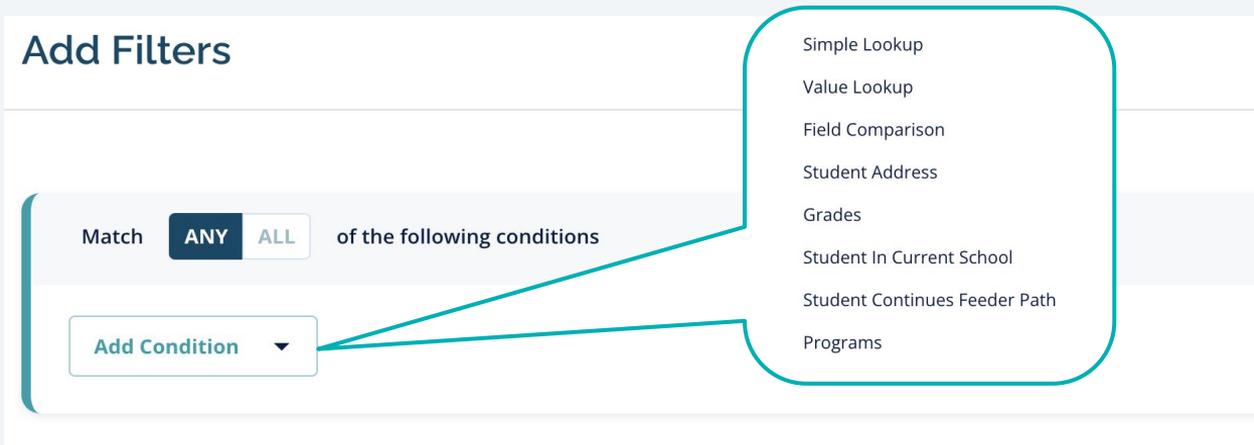
We have premade filter formats that make it easy for you to select exactly what criteria students need in order to be included in the report.

Add Filters

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

Add Condition ▼

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

The image shows a screenshot of a software interface for adding filters. At the top, the title 'Add Filters' is displayed. Below it, there is a section for selecting the match criteria, with 'ANY' selected and 'ALL' unselected. To the right of this is the text 'of the following conditions'. Below the match selector is a button labeled 'Add Condition' with a downward arrow. A teal callout box points from this button to a list of filter conditions: 'Simple Lookup', 'Value Lookup', 'Field Comparison', 'Student Address', 'Grades', 'Student In Current School', 'Student Continues Feeder Path', and 'Programs'.

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!



Zendesk

Help Articles

Webinar Calendar & Resources

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Support

Crafting Your Data: Report Building Essentials

- Common Application Columns
- Common Application Filters
- Common Lottery Columns
- Common Lottery Filters

October 15, 2024

[Click Here to Register](#)

Thank You

Survey



bit.ly/reports_enroll