



SchoolMint Enroll

Crafting Your Data:
Report Building Essentials



Meet the Hosts

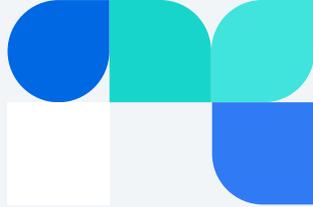


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Presenter



Ian Cary
Customer Experience Manager
Q&A





Agenda

- Report Columns
- Report Filters
- Live Demo Report Building



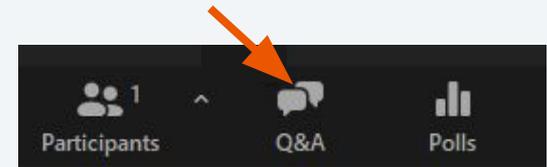
Logistics



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

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	1 Withdrawn Applications	Private Report	11/03/2021 11:36 AM	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

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.

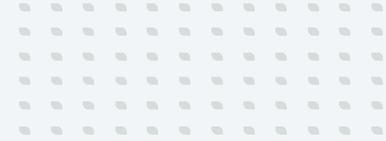
You can use filters to search for the field you are wanting to use, as well as what data model and values are connected to it!



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 Save Field

Data Model *

Appeals

Application

Event Programs

Event Sessions

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

Event Students

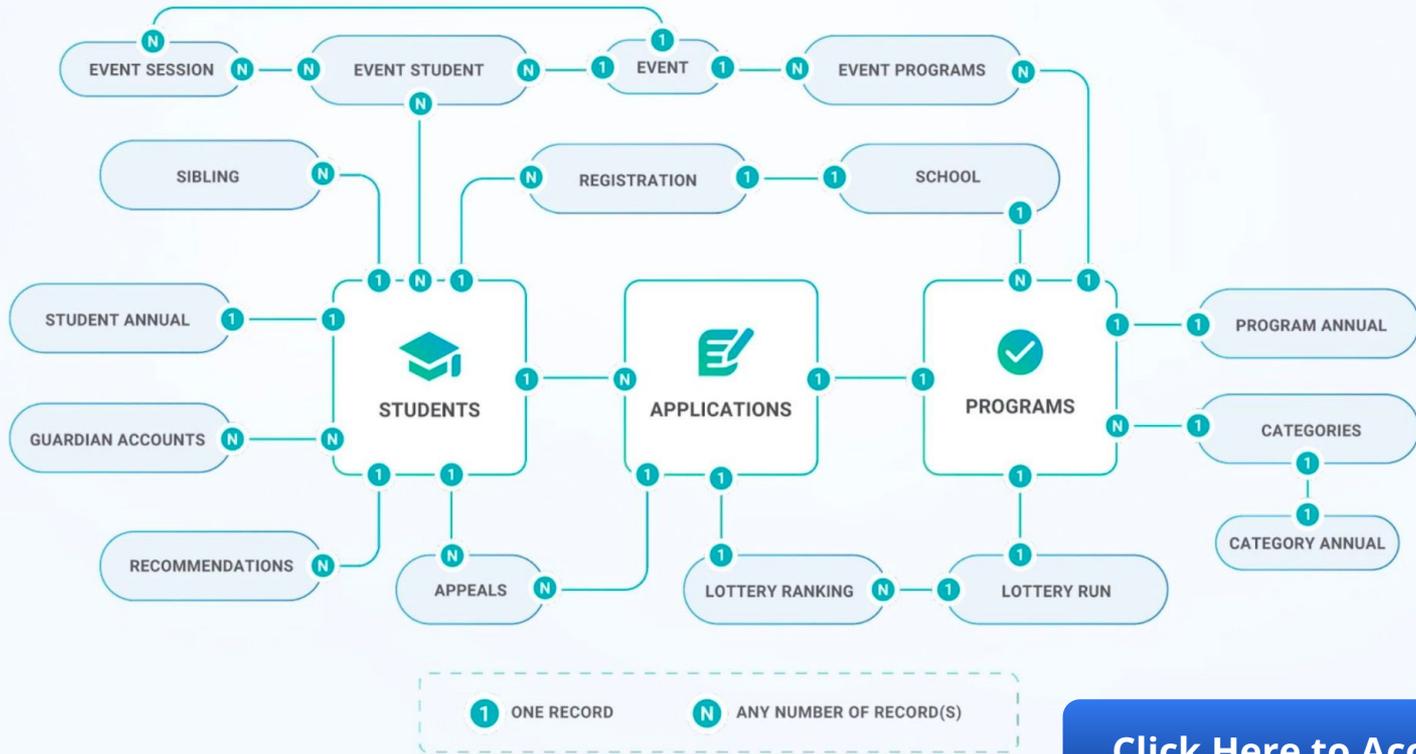
Events

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

Understanding the Data Model Matrix

You may notice 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!](#)

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

Report Filters

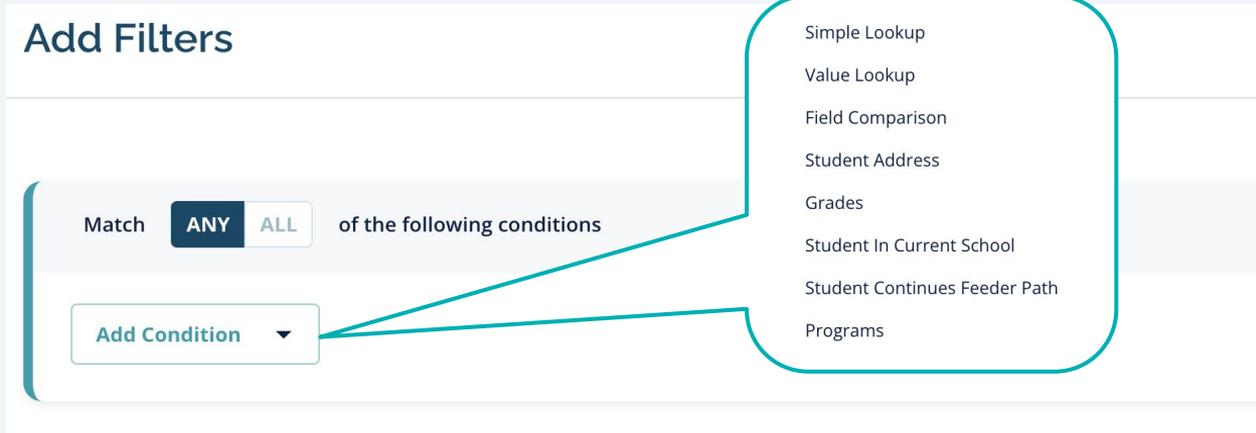
We have premade filter formats that make it easy for you to select exactly what criteria students need in order to be included in the report.

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 user interface for adding filters. At the top, it says 'Add Filters'. Below that, there is a 'Match' section with two radio buttons: 'ANY' (which is selected) and 'ALL'. To the right of these buttons is the text 'of the following conditions'. Below this is a button labeled 'Add Condition' with a downward-pointing arrow. A teal callout box points from this button to a list of filter options: 'Simple Lookup', 'Value Lookup', 'Field Comparison', 'Student Address', 'Grades', 'Student In Current School', 'Student Continues Feeder Path', and 'Programs'.



Using Conditions

- **Simple Lookup:** choose the filter, operator, and input the expected value
- **Value Lookup:** choose the filter, operator, and pick from an existing value (limited field selection)
- **Field Comparison:** compare the values of two fields
- **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 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

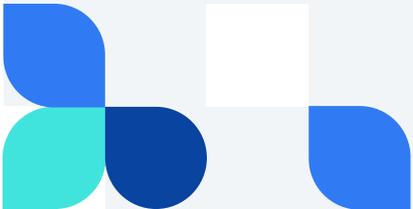
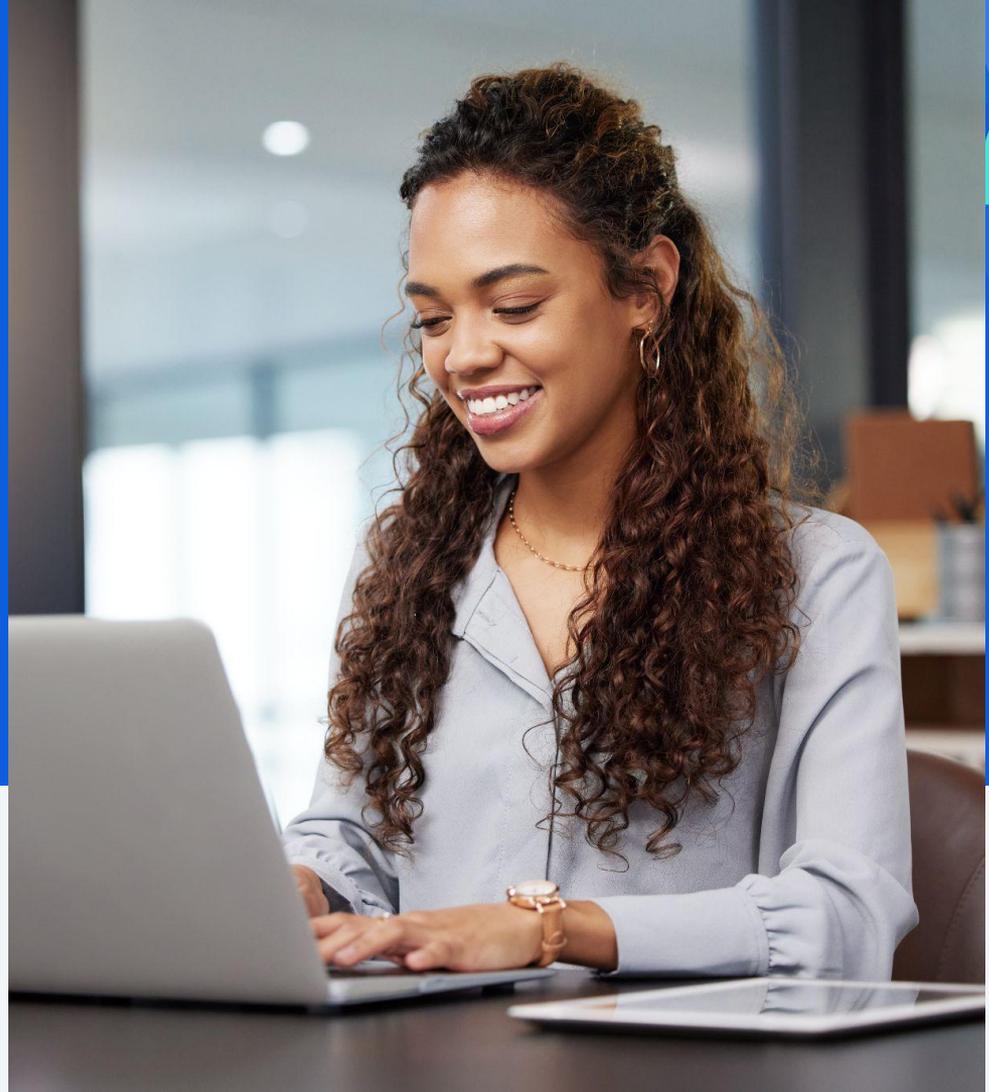
Status IS NOT -1 - this means that the form status is NOT still In Processing

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

Let's Build an Application Report Together!



Zendesk

Help Articles

Webinar Recordings and Slide Decks

Issues, Bugs, and General Q&As

Community

Customer Forum

Feature Requests

Admin Resources

Q&A

Survey





Thank You

