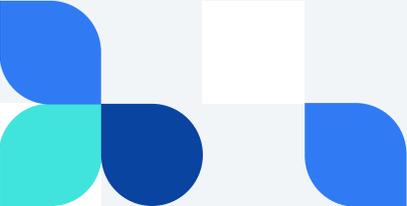




# SchoolMint Enroll

Registration Filters & Saved Views



# Meet the Hosts



**Alexis Robin**  
Professional Services Specialist  
Presenter



**Ian Cary**  
Customer Experience Manager  
Q&A



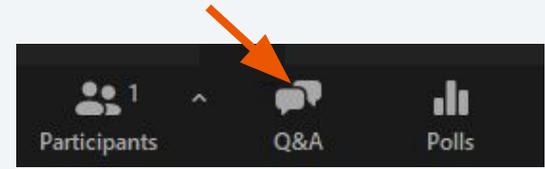
# Logistics



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](https://schoolmint.zendesk.com)



Two Surveys at the end

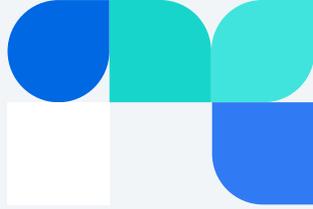


# Agenda

- Creating Filters
- Creating Saved Views

## Your Access

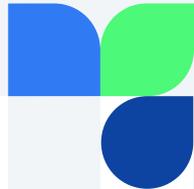
- Access to view registrations





# Let's Get Started

1. Navigate to **subdomain.schoolmint.com/manage** and **login**
2. Setup your Virtual Space



# Values, Fields, and Records



# Records

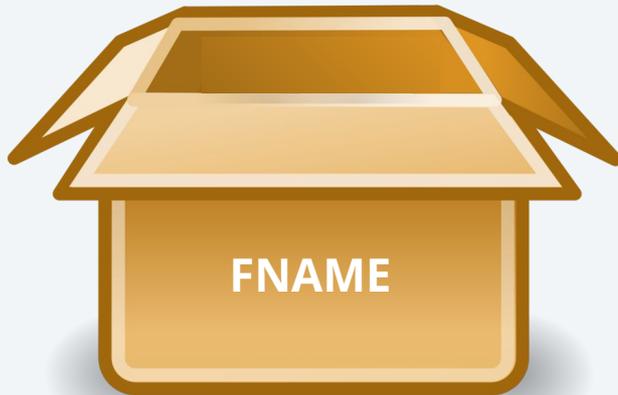
Let's think of your Enroll platform as a storage facility. Each storage unit in the facility = a record we're saving data to.



For example, all of our data related to the student would be saved in the Student record.

# Fields

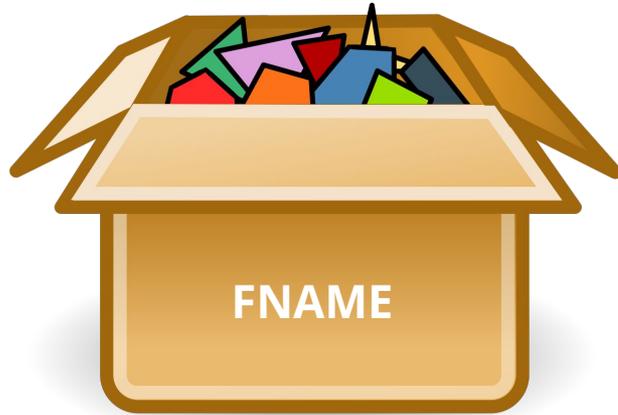
Think of fields like the storage boxes in each of your storage units. Each box is labeled with the data point it is collecting.



For example, when the student's first name is saved on the platform, the data collected will be saved to the "fname" field. That fname "box" (field) is in our Student "storage unit" (record).

# Values

Inside each of our boxes are the actual items it is collecting. Sometimes, what's inside the box matters - you can't just throw anything in there—you have to pick from what's allowed.



For example, when collecting the student's first name, the guardian can input any name. However, when collecting something like guardian relationship, they may choose from a set list of values.

# Common Records 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

## Application

- submitted
- submitted\_timestamp
- status

## Lottery Ranking

- lottery\_list
- accepted

## Registration

- submitted
- submitted\_timestamp
- status

# Form Field Download

Settings >> Forms >>

 **Form Field Download**

This generates a CSV file of all your form 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!



# Data Dictionary

## Found on Zendesk

This contains all of our standard SchoolMint fields, including form and lottery statuses.

[Click Here to Access](#)

# Status Fields

Most of our status fields are not found in the form field download, but can be found in the data dictionary. They usually use a number value of 1, 0, or -1.

## Example:

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

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

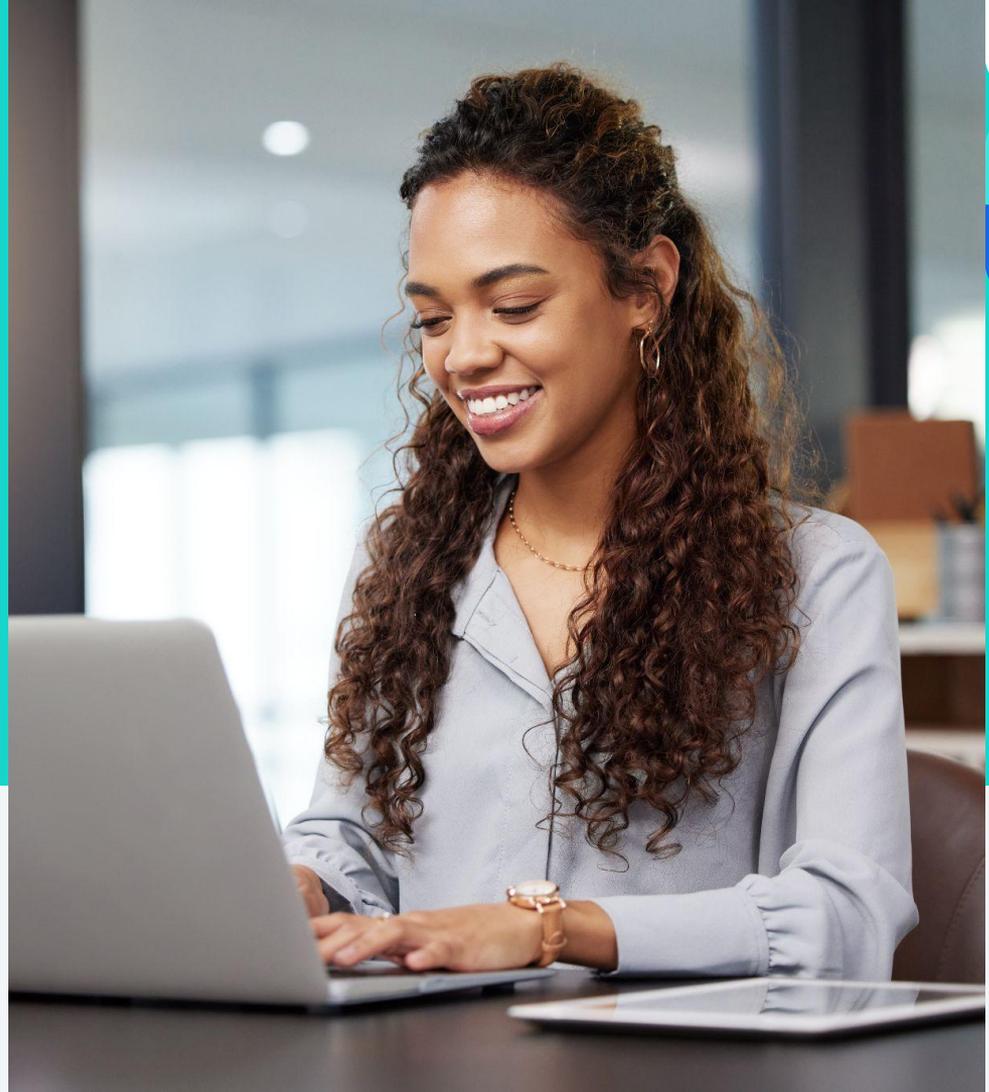
**Status IS NOT -1** - this means that the form status is NOT still In Processing

## 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

# Using Filters



# 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
- ★ Residency Data

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 student_annual.residence_t... ▼	Operator IS NOT ▼	Expected Value PermanentResidence ✕
---	----------------------	--

Cancel

Apply Filters

# Custom Filter Types

You can use a Simple Lookup, Value Lookup, or Field Comparison filters in the Application and Registration modules.

## 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

**Add Condition** ▼

- Simple Lookup
- Value Lookup
- Field Comparison

Cancel Apply Filters

# Select Field

When creating a filter, you need to select what field you want to filter with. They will be organized by record, in alphabetical order. You can also start typing the field name to find it more easily.

### 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	Operator	Expected Value
application		
application.admin_added		
application.agree		
application.auto_eligibility		
application.auto_eligibility_last_run		
application.choice_rank		

Cancel Apply Filters

# Operator

When creating a filter, there are various types of operators you can use.

### 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	Operator	Expected Value
student_annual_guardian1_...		Mother

Your most common operators are going to be:

- IS
- IS NOT
- IS EMPTY
- HAS VALUE

# Expected Value

When creating a filter, there are different types of values you can manually input, select from, or compare your selected field to, depending on the type of filter you've selected. Values must be exact to what is collected in that field.

### 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

Value Lookup student_annual.guardian1_...	Operator IS	Expected Value 
--	----------------	--------------------

- Aunt
- Aunt
- Brother
- Brother
- Father
- Father
- Friend
- Friend
- Grandfather

# Simple Lookup

A simple lookup filter is the most robust filtering option. Select the field, operator, and expected value in order to find students who meet the criteria set.

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.guardian1_... ▼	IS ▼	Mother  <input type="button" value="x"/>

▼

# Value Lookup

A value lookup filter is similar to the simple lookup, but instead of needing to enter in the value yourself, you can choose from a dropdown of the expected values. This is limited to only our SchoolMint standard fields.

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

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

Value Lookup student_annual.guardian1_...	Operator IS	Expected Value 
--	----------------	--------------------

**Add Condition** ▼

- Aunt
- Aunt
- Brother
- Brother
- Father
- Father

# Field Comparison

A field comparison filter allows a user to compare the value of two fields and determine whether they have the same or similar values or not.

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\_annual.address

Operator

IS NOT

Select Field

student\_annual.guardian1\_...

Add Condition

# ANY or ALL?

When you add more than one filter using the Additional Filters option, you can choose to add an AND or OR function between the 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_annual.guardian1_... ▼	Operator IS NOT ▼	Select Field student_annual.address ▼	✕
--	----------------------	--	---

**AND**

Select Field student_annual.guardian2_... ▼	Operator IS NOT ▼	Select Field student_annual.address ▼	✕
--	----------------------	--	---

Add Condition ▼

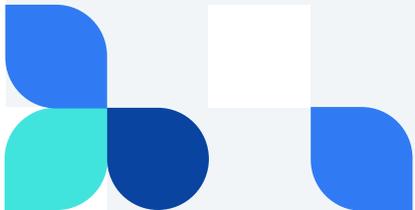
# Practice

Complete the following challenge in Enroll

- 1. Use Quick Filters to filter for Submitted + In Processing Registrations**
- 2. Create a filter that finds students whose gender is Female**

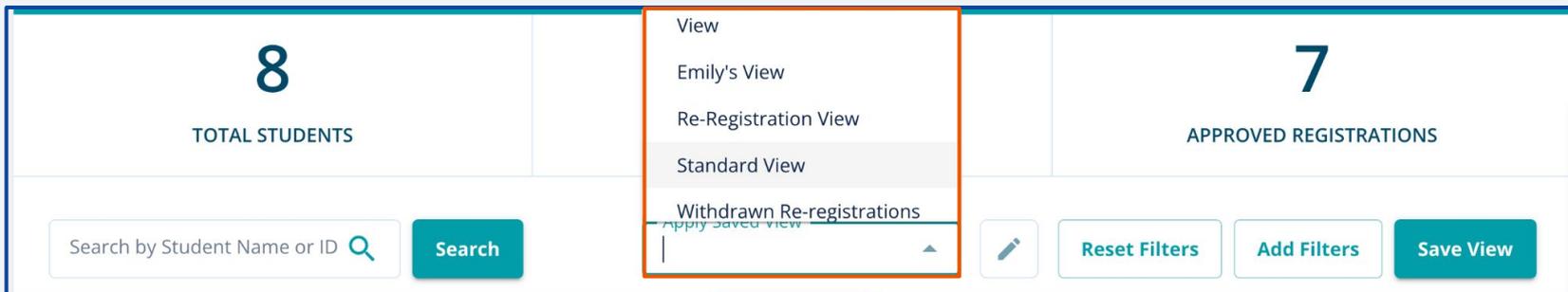


# Saved Views



## 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](#)

# Registration: Using Dynamic Views

Save View: [Add New](#)

Cancel

Save View

## General Information:

Name this View \*

IEP

## Access Settings

- Private Report (only accessible to you)
- Globally Available to All Users

## Filters Applied:

[Add Filters](#)

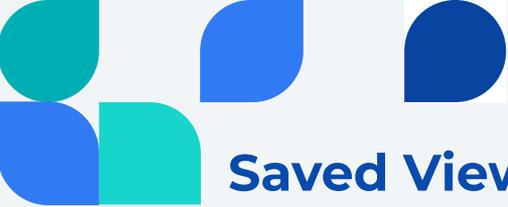
Field	Operator	Value	Actions
iep	IS	Yes	 

## Quick Filters Applied: *Edit quick filters on the application dashboard.*

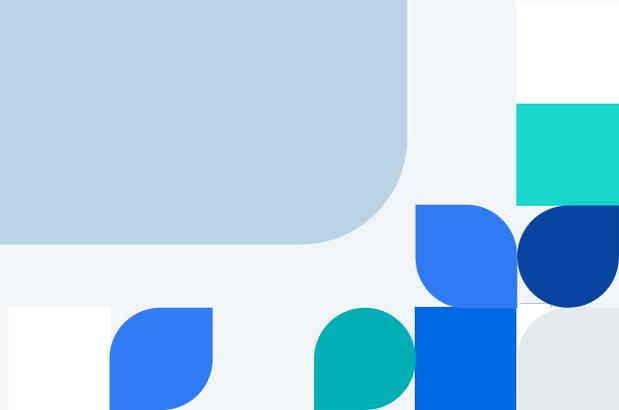
Field	Operator	Value
Application	IS	Submitted

## You can now:

- Name the view.
- Set access settings to private or globally available.
- View all filters and edit dynamic filters that have been applied
- Update the columns in your Registration Dashboard



## **Saved Views:** Use These Saved Views for Your Site

- ★ **Transportation Needs**
  - ★ **Enrollment Checklists**
  - ★ **Contact Information**
  - ★ **Recommendation Reports**
  - ★ **Registration Not Submitted**
- 

# Practice

Complete the following challenge in Enroll

- 1. Filter for Not Submitted, Not Withdrawn Registrations**
- 2. Create a Saved View, make it Globally Available, and add a column for “maxstep”**



# Q&A

## Survey



# SIS Mapping and Data Preparation

- **Configure Sync Service Data Mapping**
- **Guide to Transformations**

May 20, 2025

[Click Here to Register](#)

**Zendesk**

**Help Articles**

**Webinar Recordings and Slide Decks**

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

**Community**

**Customer Forum**

**Feature Requests**

# **Admin Resources**

**THANK YOU!**

