

Misshoroll

Fundamentals of Reporting

Meet the Hosts



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Q&A





Agenda

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

- Reviewing Report Features
- Using the Form Field Download
- Creating Reports

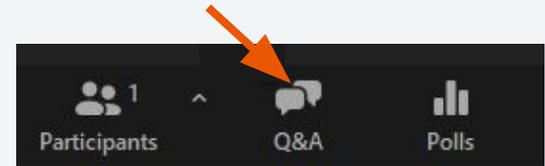
Logistics



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

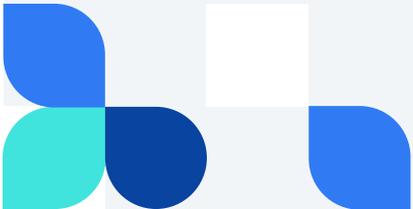
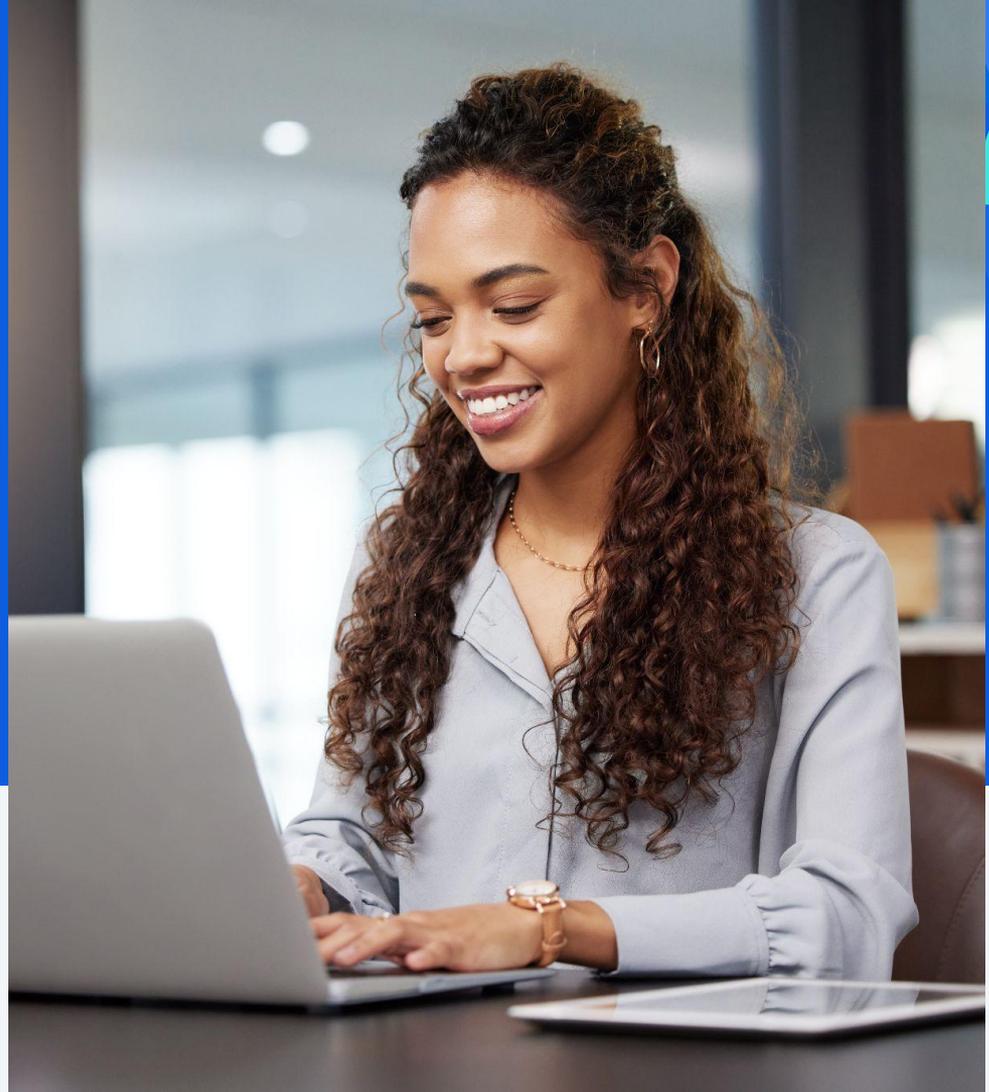
Applications

Other Reports

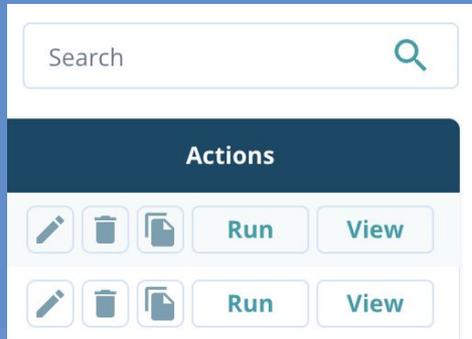
Search

★	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

Report Module Features



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.



Favorite - Save your most used reports to show first when you access the Reports Module

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 History

Application Data for Open Enrollment Programs

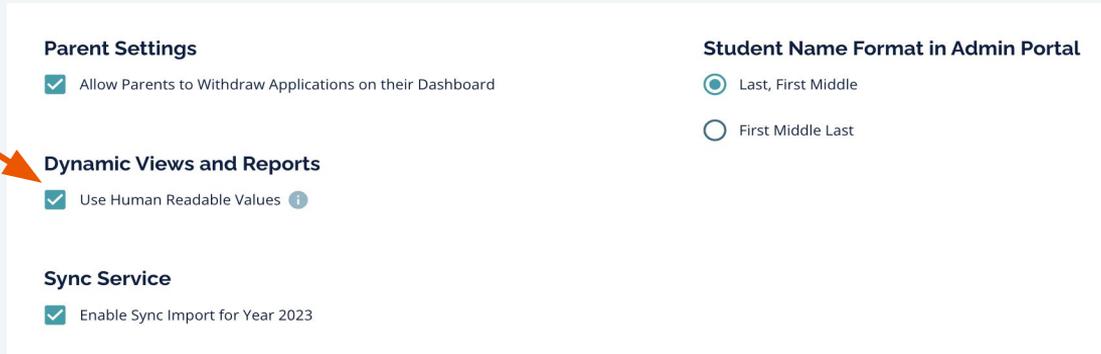
Up to 20 snapshots available.

Bulk Actions

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

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!](#)

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

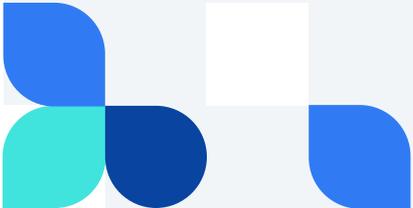
Registration Reports

Favorite Reports

Search

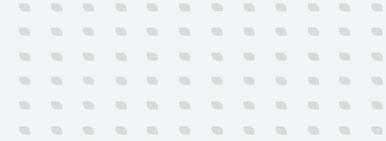
★	Report Name	Access	Created By	Created At	Last Run	Actions
★	Application Data for Op...	Globally Available to All...	Emily Carlson	10/25/2022 02:50 PM	10/02/2024 12:	Run View
★	Application for Transfe...	Globally Available to All...	Emily Carlson	10/27/2022 09:56 AM	01/25/2023 03:	Run View
★	Default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

Report Builder



Report Settings

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



General Information

Report Name *

Demo Report

Report Categories

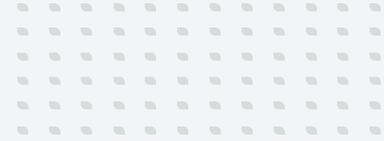
Description

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 *

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

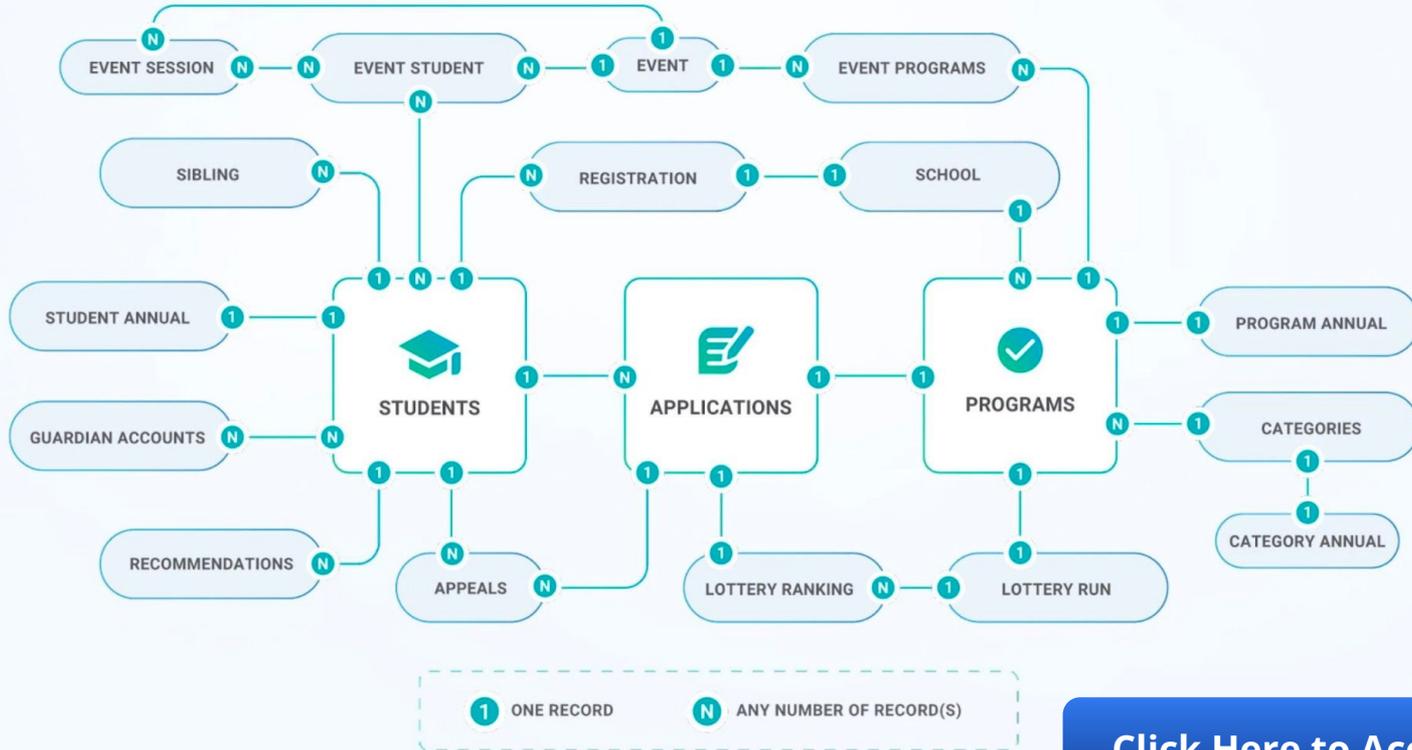
This record contains fields that cannot be linked with the previously selected field(s).

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.

SchoolMint Enroll | Report Builder: Data Model



[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

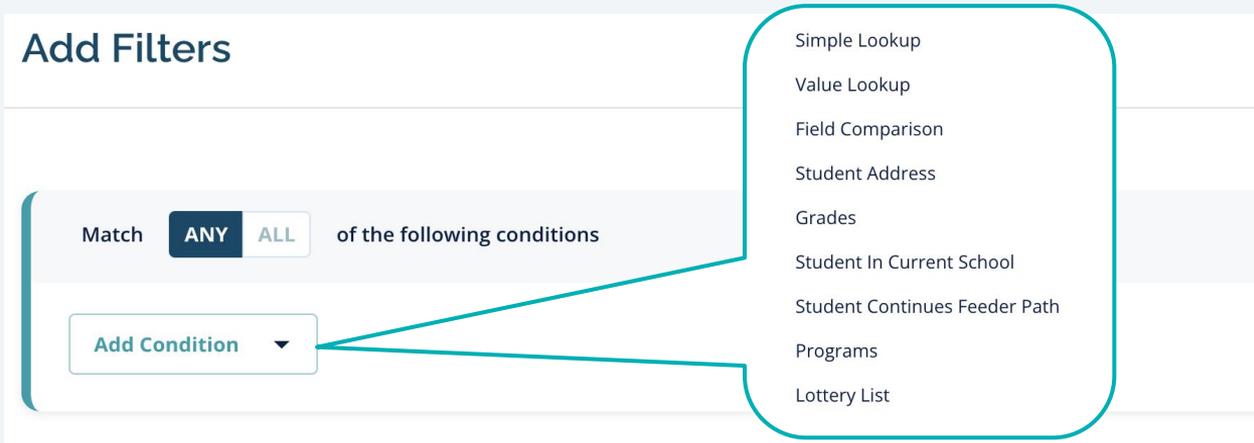
New Fields!

- ★ **Application Ineligible Reason** -> Application Record
 - `ineligibility_reason`
 - `ineligibility_reason_other`
- ★ **Lottery Decline Reason** -> Lottery Ranking Record
 - `accepted_declined_reason`
 - `accepted_declined_reason_other`

Click Here:
Learn More About 2.7 Release

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.



The screenshot shows the 'Add Filters' section of a software interface. It features a 'Match' section with two radio buttons: 'ANY' (selected) and 'ALL'. Below this is a text label 'of the following conditions'. A button labeled 'Add Condition' with a downward arrow is positioned to the left of a list of filter options. A teal callout box highlights the 'Add Condition' button and the list of options.

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
- Lottery List



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)
- **Lottery List** - can pull students waitlisted at all choices

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

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.

Match ANY ALL of the following conditions

Select Field	Operator	Expected Value
student_annual.guardian1_... ▼	IS ▼	Mother ✕

▼

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.

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

Value Lookup	Operator	Expected Value
student_annual.guardian1_...	IS	<input type="text"/>

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.

Match ANY ALL of the following conditions

Select Field student_annual.address	Operator IS NOT	Select Field student_annual.guardian1_...	<input type="button" value="x"/>
--	--------------------	--	----------------------------------

Operator

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

The screenshot shows a filter configuration interface. At the top, it says "Match ANY ALL of the following conditions". Below this, there are three main input areas: "Select Field" with a dropdown menu showing "student_annual.guardian1_...", "Operator" with a dropdown menu showing a list of operators, and "Expected Value" with a text input field containing "Mother". There is an "Add Condition" button on the left and "Cancel" and "Apply Filters" buttons on the right.

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

Select Field: student_annual.guardian1_...
Operator: |
Expected Value: Mother

Add Condition

Cancel Apply Filters

IS
IS NOT
IS EMPTY
HAS VALUE
CONTAINS
DOES NOT CONTAIN
IS GREATER THAN
IS GREATER THAN OR EQUAL TO
IS LESS THAN
IS LESS THAN OR EQUAL TO
IN
NOT IN

Your most common operators are going to be:

- IS
- IS NOT
- IS EMPTY
- HAS VALUE

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.

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 ▼

Data in Enroll



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!



Data Dictionary

Found on Zendesk

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

[Click Here to Access](#)

Standard Reports



Standard Reports

Application Count by Ranked Choice

This standard report is **ONLY** available if an application form process is using choice ranking. The report will not appear if you are not using at least one form process with this setting enabled.

Reminder: filter for a program first for the report to show data

Application Count By Ranked Choice Export

Select Program(s) School Level(s) Program Category(s) Choice Schools Neighborhood Schools Ranked Choice Apply Filters

Ranked Choice - 1

Program Name	PreK	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
Puppy School	1	5	15	10	12	5	8	5					2		63
East West - IB Program							1	7	12	4			1		25
							2	10	5						17
								1				1	1		3
								12	9	2	1		2		27
								1				2	2		5
								1				1	2		4

1 - 1 of 3 Ranked Choices

This report lists each program and grade that matches the quick filters and then lists a total amount of applications that have been submitted to each program for each grade

Seat Tracker



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

Next Enroll Webinar

Transition to the New Year

- Reviewing your data
- Prepare your Platform for Roll Over
- Tips for Rolling Over

[Click Here to Register](#)

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Survey

