

 **SchoolMint** Enroll

1.8 Amazing Features

SUMMER RELEASE PART 2:

Dynamic Views, Calculated Fields, Download Attachments,
Conditional Fields, Report Builder and Sync Service Enhancements

Feature Walkthrough / Product & Engineering





Targeted for September 2, 2022

Enroll 1.8 New Features

- Table List Enhancements:
Dynamic Views
- Calculated Fields
- Score-Based Lottery
- Conditional Fields
- Download Forms/Attachments
- Auto-Denial for Registration
- Enhancement Items
- Sync Service Updates
- Report Builder Enhancements
- In-Product User Guide
- Connect Integration

Conditional Fields

Add conditional fields within a step of the form process

Conditional Fields

- Gives the ability to have fields within a form step to hide or show based on answers to other questions in that step.
- Uses the power of the rules engine that now also works in the front end to have ultra-responsive UI.

Conditional Fields - How to Build

1. Write down your scenario
2. Go to/Create step *(existing functionality)*
3. Set up your fields: data fields, questions and content snippets. *(existing functionality)*
4. Add your conditions *(NEW FUNCTIONALITY)*
5. Test it out and troubleshoot

Conditional Fields - Write Down Scenario

IEP Scenario

- Do you have an IEP?
 - No - Do nothing
 - Yes - Have documentation?
 - Yes - Show uploads field
 - No - Show content snippet with instructions

Conditional Fields - Create the Step

Existing Functionality

The screenshot displays the 'Manage Forms' interface in the SchoolMint Enroll system. At the top, the user is identified as 'Chad Smith | Cirque Du Dahlia' with a 'My Account' dropdown and a '2021-2022' dropdown. The navigation bar includes icons and labels for Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The breadcrumb trail is 'Settings > Forms > Applications > QAA Parent Application Flow > Add Step'. The main heading is 'Manage Forms'. On the left, there are three tabs: 'General', 'Schools/Programs', and 'Date & Time'. The 'General' tab is active, showing the title '5997: Add Step' and a 'Cancel' button. Below the title, the 'Name' field is labeled 'Step Name*' and contains the text 'Individual Education Plan'. A 'Save Step' button is located to the right of the input field.

Chad Smith | Cirque Du Dahlia My Account 2021-2022

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Settings > Forms > Applications > QAA Parent Application Flow > Add Step

Manage Forms

General

Schools/Programs

Date & Time

5997: Add Step Cancel Save Step

Name

Step Name* Individual Education Plan

Conditional Fields - Set up Fields

Existing Functionality

1. Name custom fields clearly so you know what it is later when you use it with conditional logic.

The screenshot displays the 'Manage Forms' interface for 'Individual Education Plan Form Fields'. The breadcrumb trail is 'Settings > Forms > Applications > QAA Parent Application Flow > Individual Education Plan'. The left sidebar lists various form management options, with 'Forms' selected. The main content area shows a table of form fields with columns for Order, Form Field Label, Type, Attributes, and Actions. The table contains four rows of fields, each with a unique label and type.

Settings > Forms > Applications > QAA Parent Application Flow > Individual Education Plan

Manage Forms

Individual Education Plan Form Fields

Manage Form Fields. [QAA Parent Application Flow](#)

[Back to All Steps](#) [Conditional Logic](#) [Add Form Field](#)

Order	Form Field Label	Type	Attributes	Actions
=	* Does student have IEP? student_annual.iep_yn	Radio	Required: Parent Disabled:	
=	* Have Supporting Documents? student_annual.iep_docs_yn	Radio	Required: Parent Disabled:	
=	* Upload IEP Documents student_annual.iep_doc_uploads	File Upload	Required: Parent Disabled:	
=	IEP No Upload null.null	Content Snippet	Required: Disabled:	

Conditional Fields - Write Down Scenario

IEP Scenario

- Do you have an IEP? (**iep_yn-Does student have IEP?**)
 - No - Do nothing
 - Yes - Have documentation? (**iep_docs_yn-Have Supporting Documents?**)
 - Yes - Show uploads field (**iep_doc_uploads-Upload IEP Documents**)
 - No - Show content snippet with instructions (**IEP No Upload**)

Conditional Fields - Add Conditions

New Functionality

Conditional Logic


Cancel

+

Save

Select a Field below and start configuring conditional logic

Selected Conditional Field(s)*

Have Supporting Do... 

Conditional Field: this is what will hide or show

SHOW HIDE

If **ANY** ALL of the conditions below are met

Select Field

iep_yn

Operator

IS

Expected Value

Yes



Add Condition 

Add Nested Group

Field used as a Condition

Conditional Fields - Add Conditions

New Functionality

Selected Conditional Field(s) *

Upload IEP Docume... ✕



SHOW HIDE

If **ANY** **ALL** of the conditions below are met

Select Field

iep_docs_yn

Operator

IS

Expected Value

Yes

AND

Select Field

iep_yn

Operator

IS

Expected Value

Yes



Add Condition

Add Nested Group

Sometimes you might find you need to add additional conditions if you have multi-part questions so that if they change their answers to questions above, to won't show fields that pertained to the questions after that.







Conditional Fields - Add Conditions


New Functionality

Selected Conditional Field(s) *
IEP No Upload  

SHOW **HIDE**

If **ANY** **ALL** of the conditions below are met

Select Field iep_docs_yn 	Operator IS 	Expected Value No 
AND		
Select Field iep_yn 	Operator IS 	Expected Value Yes 

Add Condition  **Add Nested Group**

Conditional Fields - Test It Out

1. Pull up example student on another window on the admin side.
2. Refresh Form Entry page after each setup change
3. Test out every way a parent could fill in and change their answers. You may need to add additional conditions.

Conditional Fields - Example Flows

New Functionality

Does student have IEP? *

Yes

No

[Save & Continue](#)

Does student have IEP? *

Yes

No

Have Supporting Documents? *

Yes

No

Please turn in all needed documentatino to the district office within two weeks.

[Save & Continue](#)

Does student have IEP? *

Yes

No

Have Supporting Documents? *

Yes

No

Upload IEP Documents

Accept .avi, .csv, .doc, .docx, .fav, .gif, .html, .jpeg, .jpg, .mp3, .mpeg, .pdf, .png, .rtf, .txt, .wma, .xls, .xlsx, .zip

[Save & Continue](#)

Conditional Fields - Tips and Tricks

- Required Fields are not required unless they are shown
- Only fields that are shown will display in the send and review step.
- Downloads include all fields.
- A field can only be conditional in one logic block per step.
- Be mindful of how you name custom fields so you can tell if it is a conditional field or a field used as a condition.
- If you want to use a field as a condition that isn't from a question you want to ask, add it to the field in the step and set it to always hide. Then you can use it as a condition.

Dynamic Views: Filters

Phase 1 of Dynamic Views: Admins can create custom filtered view sets, save them, and share them with the organization.

Dynamic Views: Filters

- Dynamic Views: Filters allows admins to create custom filters on the application and registration tables.
- Filtered views can be saved as a private view or shared globally with the organization.

Dynamic Views - Create a Filter

Filter by Status
Show applications:
 Submitted
 Not Submitted
With Status:
 Eligible
 Ineligible
 In processing
Submission Date Range:
From [] To []
Withdrawn:
 Withdrawn
 Not Withdrawn
Lotteries:
Lottery List [] Lottery Status []

Filter by Application Attribute
Form Process []
School []
Grade []
Category []
Program [East West - IB Program]
Priority []
Recommendations []

Filter by Student Attributes
Search by Student Name or Student ID []
Flags []

1. Apply any quick filters you would like to use.

Apply Saved View [] **Add Filters** Save View

2. Choose Add Filters to select an additional field to be added as a custom filter.

3. A modal will appear and the admin can be selecting fields and conditions to apply to the view

Add Filters [X]

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

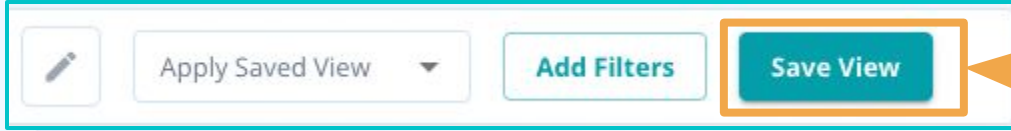
Match **ANY** ALL of the following conditions

Select Field [] Operator [] Expected Value []

Add Condition []

Cancel Apply Filters

Dynamic Views - Save a Filter



Once a custom filter has been applied the Save View button will activate.

Save View: Add New

Cancel Save View

General Information:

Name this View *
Math Score

Access Settings

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

Filters Applied:

Add Filters

Field	Operator	Value	Actions
math_score	HAS VALUE		

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

Field	Operator	Value
Application	IS	Submitted
Application	IS	Not Withdrawn

The admin can now:

- Name the view
- Set access settings to private or globally available (user permission permitting)
- View the filters that have been applied.
 - Custom filters can be edited from this screen.

Dynamic Views - Apply a Saved View

The screenshot shows the 'Apply Saved View' dropdown menu. The menu is open, showing a list of saved views. The views are grouped into two categories: 'Created by me:' and 'Shared with me:'. Under 'Created by me:', there are three views: 'Math Score', 'Scores for Review', and 'Total Income'. Under 'Shared with me:', there is one view: 'Grade 6'. An orange arrow points from the 'Math Score' view in the dropdown to the 'Math Score' view in the 'Apply Saved View' dropdown in the table below.

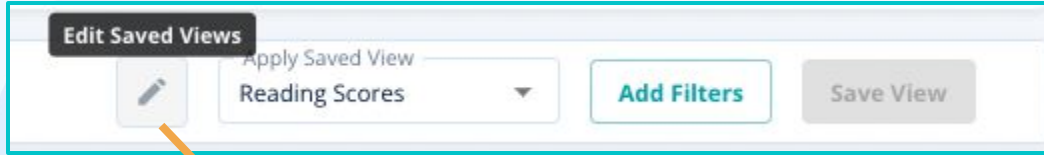
Select the saved view you wish to load from the Apply Saved View drop down. Views are grouped by Created by me (views you created) and Shared with me (views other created and shared globally.)

Results will load in the table below.

The screenshot shows a table with 27 records. The table has columns for App#, Full Name, Rank, Category, Program, Grade, Sib, Priority, Recommendations, and Actions. The table is filtered by the 'Math Score' saved view. The table shows 27 records, with 27 entries displayed. The table is sorted by Rank, and the first three records are shown. The first record is for Dakota Henry, with Rank 1, Category Choice Schools, Program East West - IB Pr..., Grade 7, Sib 2, and Priority 2. The second record is for Diana Ross, with Rank 1, Category Choice Schools, Program East West - IB Pr..., Grade 7, Sib 2, and Priority 2. The third record is for Diana Ross, with Rank 3, Category Choice Schools, Program East West Middl..., Grade 7, Sib 4, and Priority 4.

App#	Full Name	Rank	Category	Program	Grade	Sib	Priority	Recommendations	Actions
462147	Dakota Henry	1	Choice Schools	East West - IB Pr...	7		2		[User] [Edit] [Share]
454343	Diana Ross	1	Choice Schools	East West - IB Pr...	7		2		[User] [Edit] [Share]
454344	Diana Ross	3	Choice Schools	East West Middl...	7		4		[User] [Edit] [Share]

Dynamic Views - Edit a Filter



Apply Saved View
Reading Scores

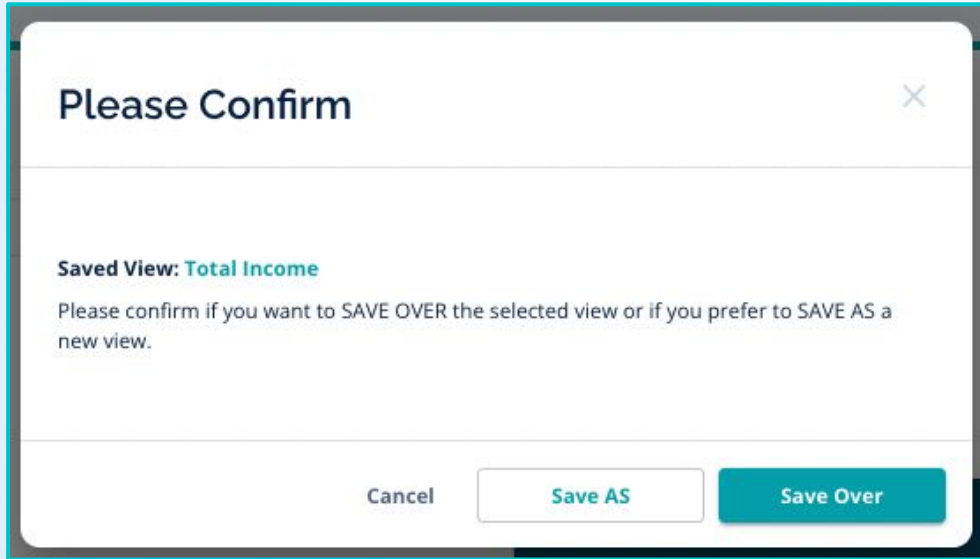
Add Filters Save View

Saved Views Back

Saved View Name	Access	Created By	Actions
Total Income	Private	Elizabeth Briney	 
Reading Scores	Globally Shared	Alexander Ledet	 
Scores for Review	Globally Shared	Elizabeth Briney	 
Eligible Score	Globally Shared	Elizabeth Briney	 
Math Score	Globally Shared	Elizabeth Briney	 
Grade 6	Globally Shared	Renzo Arecco	 

Admins can choose to edit views by clicking the Edit button. This will open the Saved Views screen. From here the admin can choose which view they would like to edit.

Dynamic Views - Edit a Filter cont.



- When the admin makes an edit to the view they have the option to Save As or Save Over.
 - Save As will create a `Copy of XXXX`
 - Save Over will overwrite the current view.
- These options are based on user permissions (discussed in our next slide.)

Dynamic Views - User Permissions

Dynamic Views

 Share Globally

 Edit/Delete Views Created by Others

Save View: [Edit](#)

General Information:

Name this View *
Total Income

Access Settings

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

Save View: [Edit](#)

General Information:

Name this View *
Total Income

Access Settings

- Private Report (only accessible to you)

- When Share Globally is enabled the admin will have access to share views they create globally.
- When Share Globally is disabled the admin will NOT have access to share views they create globally.

Dynamic Views - User Permissions cont.

Dynamic Views

 Share Globally

 Edit/Delete Views Created by Others











Saved Views

Back

Saved View Name	Access	Created By	Actions
Total Income	Private	Elizabeth Briney	 
Reading Scores	Globally Shared	Alexander Ledet	 
Scores for Review	Globally Shared	Elizabeth Briney	 
Eligible Score	Globally Shared	Elizabeth Briney	 
Math Score	Globally Shared	Elizabeth Briney	 
Grade 6	Globally Shared	Renzo Arecco	 

Saved Views

Back

Saved View Name	Access	Created By	Actions
Total Income	Private	Elizabeth Briney	 
Scores for Review	Globally Shared	Elizabeth Briney	 
Eligible Score	Globally Shared	Elizabeth Briney	 
Math Score	Globally Shared	Elizabeth Briney	 
Copy of Total Income	Private	Elizabeth Briney	 

- When Edit/Delete Views Created by Others is enabled the admin will have access to edit and delete views other admins have created.
 - This gives admins the ability to clean up/ manage views for the org.
 - The admin will see all views they have created as well as all globally shared views.
- When Edit/Delete Views Created by Others is disabled the admin will NOT have access to edit or delete views that are not their own.

Dynamic Views: Filters - Tips and Tricks

- Quick filters cannot be modified in the edit screen of a saved view. To edit these filters an admin would need to create a new dynamic view with the updated quick filters.
- It is recommended that the setting to edit/delete views created by others is only granted to Super Admins.
- In future releases, admins will have access to manage columns they would like shown with their view, ability to export the results, the option to set which column to sort by, and more!

Calculated Fields & Score-Based Lottery

Create custom calculations within the form builder for your organization. Run a lottery using score totals to place students in ascending or descending order.

Calculated Fields

- Calculated fields enables admins to create custom calculations that could be used for determining income eligibility, grade calculations, and more.
- Admins now have the ability to configure calculations within the UI using a new calculation engine.
 - Available on all form processes
 - Addition, subtraction, multiplication, and division
 - Parenthetical expressions
 - Use custom values



































Calculated Fields

Guardians Information Form Fields

Back to All Steps

Add Form Field

Manage Form Fields. PreK Application

Order	Form Field Label	Type	Attributes	Actions
=	Guardian 1 First Name student_annual.guardian1_fname	Text	Required: Disabled:	   
=	* GPA student_annual.gpa	Number	Required: Parent Disabled:	   
=	Guardian 1 Last Name student_annual.guardian1_lname	Text	Required: Disabled:	   
=	Guardian 1 Email student_annual.guardian1_email	Email	Required: Disabled:	   
=	Hourly Wage (\$) student_annual.g1_hourlywage	Number	Required: Disabled:	   
=	Hours Worked per Week student_annual.hours_perweek	Number	Required: Disabled:	   
=	Additional Income (\$) student_annual.g1_additional_income	Number	Required: Disabled:	   
=	Explanation of Calculation null,null	Content Snippet	Required: Disabled:	   
=	Total Monthly Income (\$) student_annual.total_income	Calculation	Required: Disabled:	   

Admins will add the needed fields to be used in the calculation.

A new calculation field type will trigger the calculation engine.

Calculated Fields - Creating fields to use for calculations

Order	Option Value	Label (only if different than value)
=	<input type="text" value="Option Value *"/> 4	<input type="text" value="Label"/> 100-90
=	<input type="text" value="Option Value *"/> 3	<input type="text" value="Label"/> 89-70
=	<input type="text" value="Option Value *"/> 2	<input type="text" value="Label"/> 79-60
=	<input type="text" value="Option Value *"/> 1	<input type="text" value="Label"/>

- Field types: Number Formatted, Dropdown, Radio Button
- Only fields with numeric values will be presented as an option for the calculation engine.
- Admins can assign values to range options and/or text.

Grade Calculations



Math Score

- 100-90
- 89-70
- 79-60
- 59 or below

Calculated Fields - New Field Type

Total Monthly Income (\$): Edit

Cancel

Save Field

Field Parameters i

Field Type *

Calculation Field: Total

Field Label *

Total Monthly Income (\$)

Field Description/Note

Data Settings i

Save To *

Student Annual

Field Name *

total_income

- Select the new field type `calculation field: total` to display the calculation engine.
- The field name used can then be pulled for reports, score-based lottery configuration, etc.

Select Field (a) *

Hourly Wage (\$)

Operator *

Multiply

(a*

*

Select Field (b) *

Hours Worked per Week

(a*b)

Add Operator

Formula

Calculated Fields - Calculation Engine

Design a formula by selecting form fields and math operators: Formula

Select Field (a)*
Hourly Wage (\$)

Operator*
Multiply

(a*

+

Select Field (b)*
Hours Worked per Week

(a*b)

Add Operator

Group Operator*
Multiply

(a*b)*

+

Select Field (4.33)*
Custom Value

Value*
4.33

Operator*
Add

(a*b)*4.33+

+

Select Field (c)*
Additional Income (\$)

(a*b)*4.33+c

Add Operator Add Parentheses

- Admins can select the needed fields to be used in the calculation via a drop down.
- Fields can be used across steps in the same form process to configure a calculation.
- Operators: Add, Subtract, Multiply and Divide
- Create nested groups using parentheses.
- Custom Values can be added.
- As the calculation is built, an example formula will display.

Calculated Fields - Guardian View

Grade Calculations 7/9

Next: Signature

Math Score
89-70

Reading Score
92

GPA
3.4-2.0

Previous year report card

[Choose File](#)

Accept .pdf, .doc, .docx, .png

Screen Shot 2022-08-10 at 10.42.45 AM.png [View](#)

Discipline

1 infraction

2 infractions

3 infractions

4 infractions

5 or more infractions

Final Grade Score: 98

Grade Calculations 7/9

Next: Signature

Math Score
89-70

Reading Score
92

GPA
3.4-2.0

Previous year report card

[Choose File](#)

Accept .pdf, .jpeg, .doc, .docx, .png

Uploaded: Screen Shot 2022-08-10 at 10.06.19 AM.png [View](#)

Discipline

1 infraction

2 infractions

3 infractions

4 infractions


5 or more infractions

Final Grade Score: 96

Calculations will take place in real time when inputting values in the form.

In this scenario, the calculation is subtracting the discipline field and number of infractions a student has received.

Calculated Fields - Admin View

 Student: Aaron Guadamuz Alarcon


[Merge](#) [Change History](#) [Communications Log](#) [Save Student](#)

Profile	Reading 91
Information Form	Math Grade 92
Applications	GPA 3.14
Registration	Final Grade: 379.88
Notes	
Classroom/ Teacher Info	
Student Grades	

Added as a Student Tab

Added as a step of an application

- 5. Rank Choices
- 6. Sibling
- 7. Grade Calculations**
- 8. Signature
- 9. Review and Send this is a long...

[My Account](#) [2021-2022](#) 

Math Score
100-90

Reading Score
78

GPA
3.4-2.0

Previous year report card
[Choose File](#)
Accept .pdf, .jpeg, .doc, .docx, .png

Discipline

1 infraction
 2 infractions
 3 infractions
 4 infractions
 5 or more infractions

Final Grade Score: 84

[Save & Continue](#)

Calculated Fields - Tips and Tricks

- Calculations can be created using standard mathematical equations - no need for a subtotal field.
- The `calculation field: total` field can be used to create additional calculations as needed.
- Fields can be used across steps in the same form process to configure a calculation.
- Be sure to list your `calculation field: total` field after all fields you wish to calculate.
- You can add calculations into a recommendation form; however the recommendation admin table will not have a column to display the score. To work around this you can add the total field as read only in an admin only step.
- Currently does not allow for nested parentheses but we are looking to see if this is a scenario to consider in a future release

Score Lottery

- The new Score Lottery option enables organizations with the ability to design a lottery based on placing students in a defined score order.
 - Ascending order
 - Descending order
- Lottery designs can be configured with sub-lotteries for priorities (ex. Sibling, parent employee) + the option to use a score lottery placement.

Score Lottery - Lottery Design

Tiered Sub-Lottery: 1

Select Priority(ies) ▼ Entries: 1 ×

[Add Quota](#)

[Add Group](#) Guaranteed Placement Make Entries Cumulative [Score Lottery](#)

Tiered Sub-Lottery: 1

Score Lottery: Select Score Field: total_income ▼ [Add Quota](#)

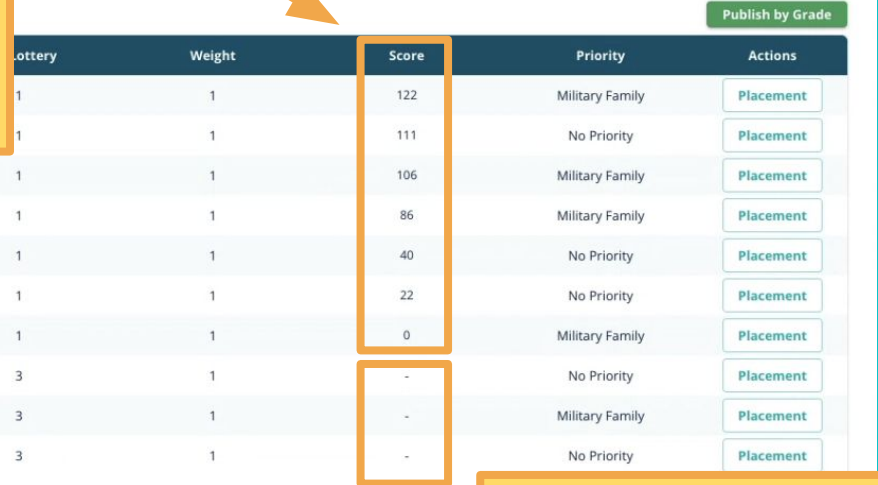
Select Order: ▲

Ascending
Descending

- Admins can select the new score lottery option.
- When selected the admin can choose a field that uses numeric values to determine the input.
- Admins can indicate sort order of either ascending or descending order.

Score Lottery - View on the lottery list

- Scores are displayed in a new score column.
- When there is a tie in scores students are placed based on the score sorting method (random, date submitted) when running the lottery.



Publish by Grade

Lottery	Weight	Score	Priority	Actions
1	1	122	Military Family	Placement
1	1	111	No Priority	Placement
1	1	106	Military Family	Placement
3	1	86	Military Family	Placement
4	1	6745489	Military Family	Placement
5	1	6746353	No Priority	Placement
6	1	6746011	No Priority	Placement
7	1	6745943	No Priority	Placement
8	1	6745943	Military Family	Placement
8	3	6745472	No Priority	Placement
9	3	6746641	Military Family	Placement
10	3	6745938	No Priority	Placement

Students without a score will show with a '-' in the score column

Score Lottery - Tips and Tricks

- Admins can configure score lotteries with other sub-lotteries.
- Scores of 0 are counted. No score is counted as 0.
- Negative scores will not be counted.
- Tie Breakers - students that share the same score will be sorted based on the sorting option used when running the lottery.
 - Randomization: scores are randomized in the group
 - Date Submitted (Within Priority Groups): scores are placed in date submitted order within the group
 - Date Submitted (No Priority Groups): Not supported for score lottery
- When exporting the lottery list the score is not yet included - this will be updated in the next release.

Download Forms/Attachments

Select attachments in the same dialog as your forms and manage your files

Feature Name Change

Print Forms was released in v1.7. It will now be **Download Forms/Attachments** for the following reasons:

- Feedback that Download Forms/Attachments is more clear
- Does not directly print to a printer

Download Forms/Attachments

This feature allows admins to select attachments in the same dialog as your forms and manage your files.

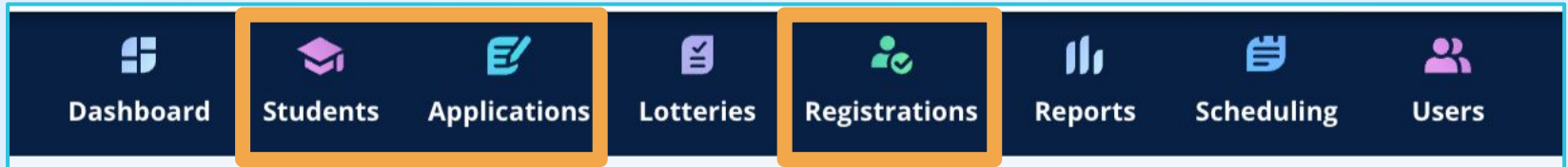
Included Sub-features:

- Registration and application bulk downloads
- Single context downloads (Student, Single app, Single School Reg)
- Zipping downloads
- Single file directory or grouped by student file convention

Download Attachments - Where to download

Three places where you can download form(s)/attachment(s):

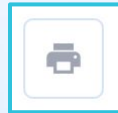
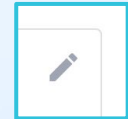
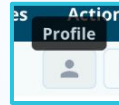
1. Students page
2. Applications page
3. Registrations page



Download Attachments - Single Download

Download a single attachment from the **Students** page by following these steps:

1. Navigate to the **Students** page
2. Click on the profile icon next to the students name
3. Navigate to the **Applications** or **Registrations** tab
4. Click on the edit icon next to the Application or Registration
5. Click the print icon at the top

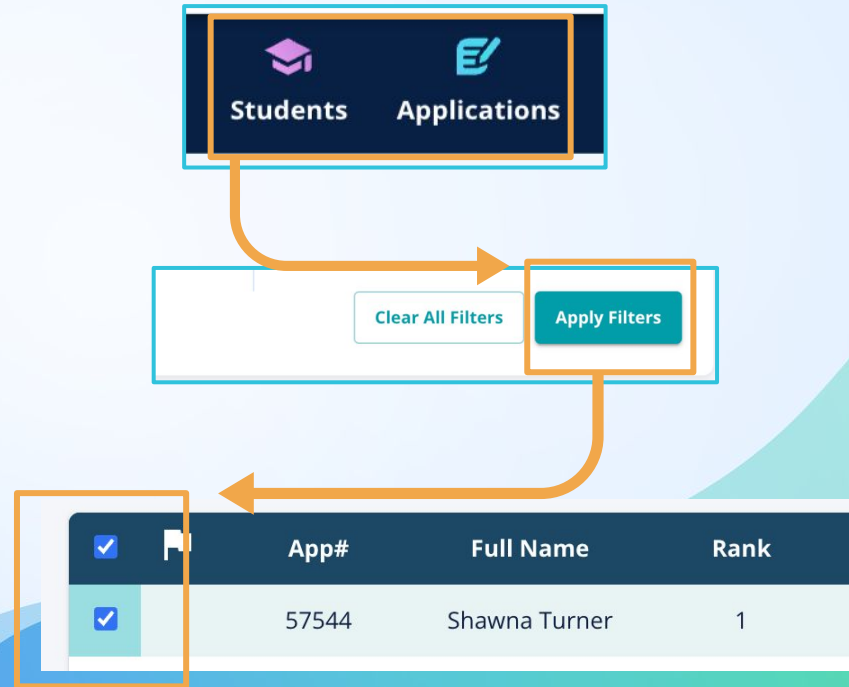


Download Attachments - Bulk Download

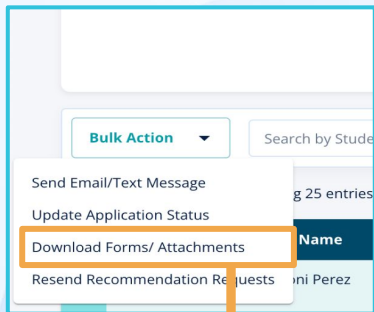
Download in bulk or single attachments from the **Applications or Registrations** pages by following these steps:

1. Navigate to the **Applications** or **Registrations** page
2. Add filters and click **Apply Filters**
3. Bulk select all students or one at a time
4. Click the **Bulk Action** button
5. Click **Download Forms/Attachments**
6. Select items to add to attachment
7. Select **One Flat Directory** or **Grouped by Student**
8. Click **Download**

- Navigate to the **Applications** or **Registrations** page
- Add filters and click **Apply Filters**
- Bulk select all students or one at a time



Download Attachments: Bulk Downloads



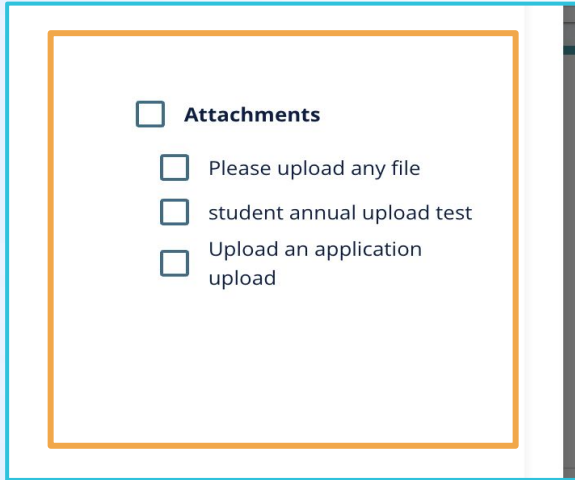
A modal window titled 'Download Forms/ Attachments' is displayed. It contains three columns of checkboxes for selection:

- Select All Items
- Forms
 - QAA Parent Application Flow
- Form Steps
 - Student Information
 - Guardian Info
 - Pick Your Programs
 - Meeting
 - UPLOAD
 - About You
 - Admin Only - Approvals
- Attachments
 - Please upload any file
 - student annual upload test
 - Upload an application upload

At the bottom of the modal, there are two radio buttons: 'One Flat Directory' (selected) and 'Grouped by Student'. A 'Download' button is located to the right of these options. An orange arrow points from the 'Download' button towards the bottom of the screen.

✓ You will receive an email once the application form(s)/attachment(s) are ready to be downloaded. Click the link in your email to download the form(s)/attachment(s).

Download Attachments



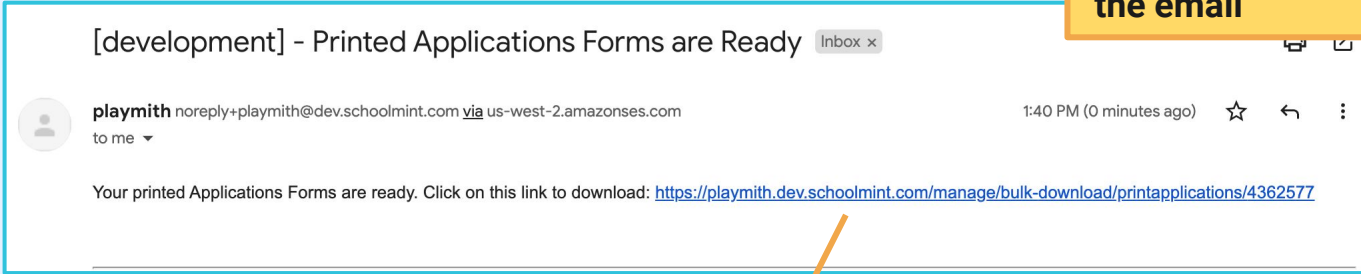
A screenshot of a web interface showing a list of attachments. The list is enclosed in a white box with an orange border. The list items are:

- Attachments**
- Please upload any file
- student annual upload test
- Upload an application upload

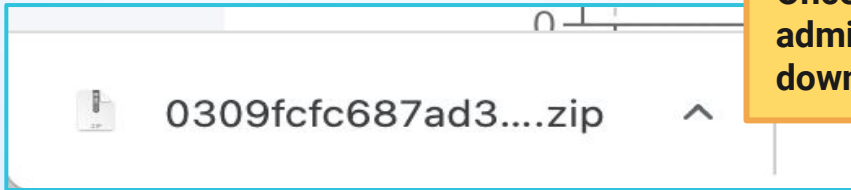
Select which attachment to download through this new filter

Download Attachments - Email

Click on the link of the email

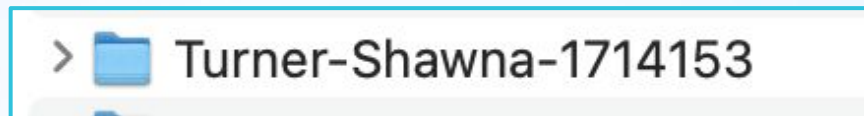


Once redirected back to admin page, click on downloadable file

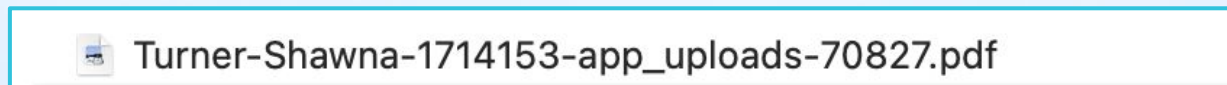


Download Attachments - File Naming Convention

Grouped by Student: [Last]-[First]-[Middle]-[StudentID]




One Flat Directory: [last]-[first]-[middle]-[StudentID]-[Field Name]-[AttachmentID]



Download Attachments - Edit Email Template

- Navigate to the **Content/Letters** tab
- Click on the **edit icon** next to “Download Attachments Complete”
- Here you can edit the content of the email template

Download Attachments Complete General Template 

Download Attachments Complete: Edit

General Information **Information**

Content Name *
Download Attachments Complete

Type
General Template

Description

All Schools/Programs

Language & Translations

EN ES AR VI

Enter in a Text Message *
Your download attachments are ready. Click on this link to download: {hyperlink}

80 characters remaining in your text message

Enter Email Subject Line *
Printed (printed_model) are Ready

Paragraph **A** **B** *I* U [List Icons] [More Icons]

Your download attachments are ready. Click on this link to download: {hyperlink}

Download Attachments - User Permissions

Schools/Programs





Date & Time

Manage Users



Lotteries

User Groups & Permissions >

Guardian Accounts >

Group Name	Description	Actions
Super Admin	Access to everything in the system.	  Edit
General Admin	General Admin	 

Documents

-  Print Forms
-  **Download Attachments**

Download Attachments - Tips and Tricks

The performance of downloading forms and attachments is much faster than the legacy products.

- That said, if an admin downloads a large number of forms/attachments, then it could take a while.
- We will continue to look for ways to optimize the workflow and performance.

Auto-Dcline for Registration

Registrations can be set to auto-dcline once a specified number of days is met

Auto-Decline for Registration

Automatically decline registrations that are not accepted in a timely manner

- Works exactly like Auto-Decline for Offers except:
 - The expiration date is based on when they accept the offer and they need to Submit their Registration before it the expiration date when it will be auto-declined.
 - When it is auto-declined, it will not only decline the offer but it will decline the unsubmitted registration as well if it exists.

Auto-Decline for Reg - Setup

The screenshot shows the SchoolMint Enroll interface. The top navigation bar includes the logo and several menu items: Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The 'Lotteries' menu item is highlighted with an orange box. Below the navigation bar, the page title is 'Lotteries & Placements'. On the right side, there is a 'Lottery Settings' dropdown menu, which is also highlighted with an orange box. The dropdown menu contains the following options: Global Lottery Settings, Program Lottery Settings, Lottery Cutoff Numbers, Lottery Priorities, and Lottery Designs. A 'Run New Lottery' button is visible next to the dropdown. Below the navigation bar, the main content area is titled 'Lottery Dashboard' and contains a description: 'View real-time lottery runs for each program, showing offered lists and waiting lists.'

The screenshot shows a breadcrumb navigation path. The path starts with 'Manage Users', followed by 'Lotteries', 'Lottery Cutoff Numbers', and 'Lottery Settings'. The 'Lotteries' and 'Lottery Settings' items are highlighted with orange boxes. The path is displayed as a series of boxes with right-pointing chevrons between them.

Two places to find the auto-decline settings:

1. Lotteries page, under **Global Lottery Settings**
2. Navigate to the Settings page, click Lotteries tab, then click **Lottery Settings**

Auto-Decline for Reg - Setup

This is similar to the Auto-decline for Applications feature,
in this case it's Registrations.

Accept/Decline Placement

- Allow parents to accept/decline seats from dashboard
- Auto-decline student's other applications on **OFFERED LIST** upon accepting seat into another choice
- Auto-decline **APPLICATIONS** on offered list **IF OFFER** is not accepted by:

- Auto-decline **APPLICATIONS** on offered list **IF REGISTRATION** is not accepted by:

Days From Accepting Seat *

365

or/and

On This Date *

08/19/2022



If the number of days from accepting seat goes past the On Date setting, then the auto-decline happens on earliest date.

Auto-Decline Time

09:00 PM



Time of day auto-decline starts on the set day/date.

Additional Enhancement Items

Enhancement Items

1. **Email Templates Permissions**

- Allows admins to only see email templates when using ad-hoc communications that they have permissions to use.
- The goal of this enhancement is to make which template an admin should use more clear.

2. **Form Step Green Checkbox Enhancements**

- Shows green check-marks in form steps when they are valid to make it more clear which steps have been successfully completed.

3. **Remove Duplicate Schools in Dropdown through Guardian Sites**

- Allows admins to delete schools from dropdown list that is shown through the guardian site so that parents are not able to pick schools that are no longer available.

4. **Improved Font size and Styling for Download Forms/Attachments**

- Condensed the font size and improved styling of download attachments so that more information can be displayed on a single page for viewing digitally and printing.

Sync Service Enhancements

UX/UI Improvements, Added Transformations, and Sync Status on Reg!

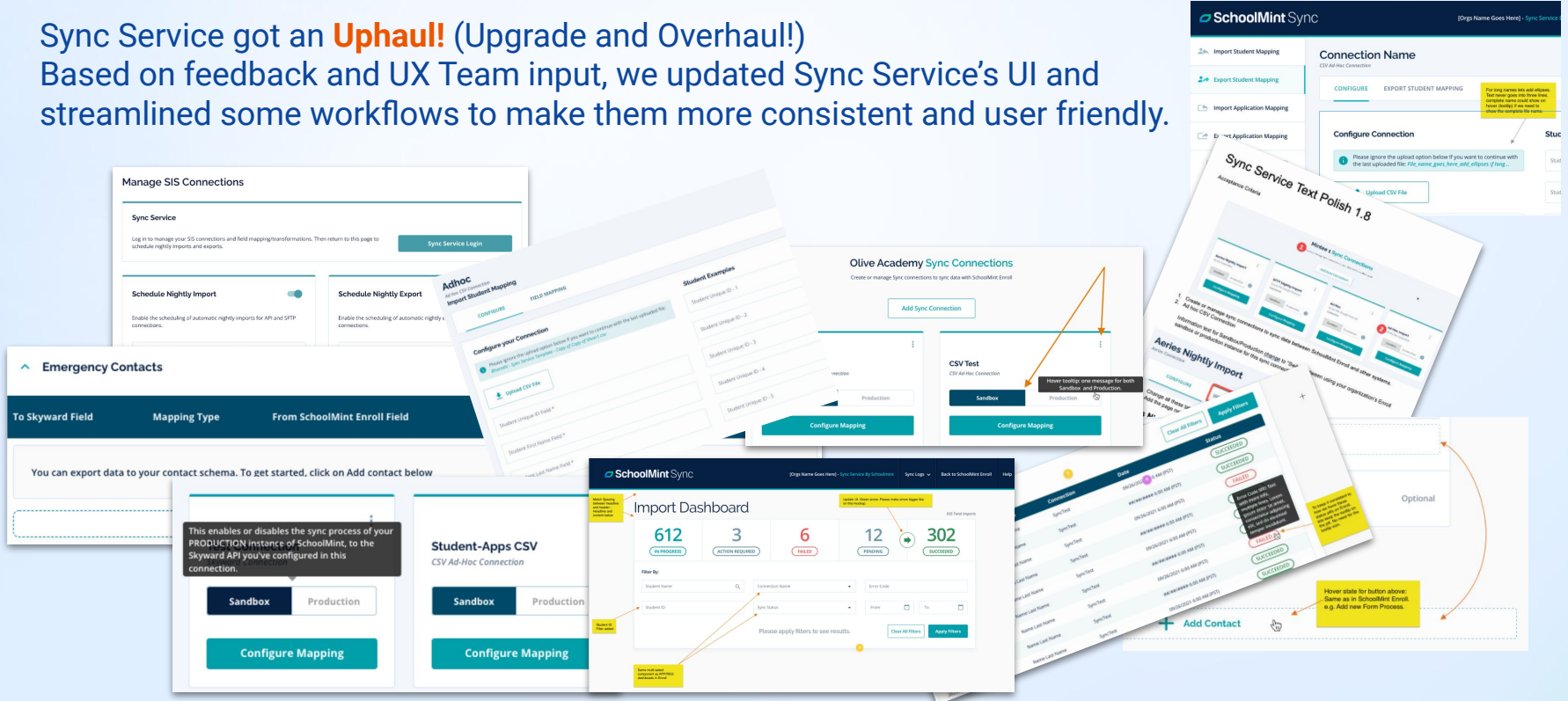
Sync Service 1.8

Sync Service 1.8 Features:

- ✓ ● UI/UX Improvements/Polish
- ✓ ● IF THEN ELSE Transformation
- ✓ ● Enroll School Year Transformation
- ✓ ● Configure Lookup UX Update
- ✓ ● Email Address Allow CAPS
- ✓ ● Last Synced/Status on Reg table
- ✓ ● Error message on Reg table
- ✓ ● Reg ID + Student ID for Registrations
- ✓ ● Data Length Condition Transformation
- ✓ ● Bug Fixes and Optimizations

Sync Service: UX/UI Improvements

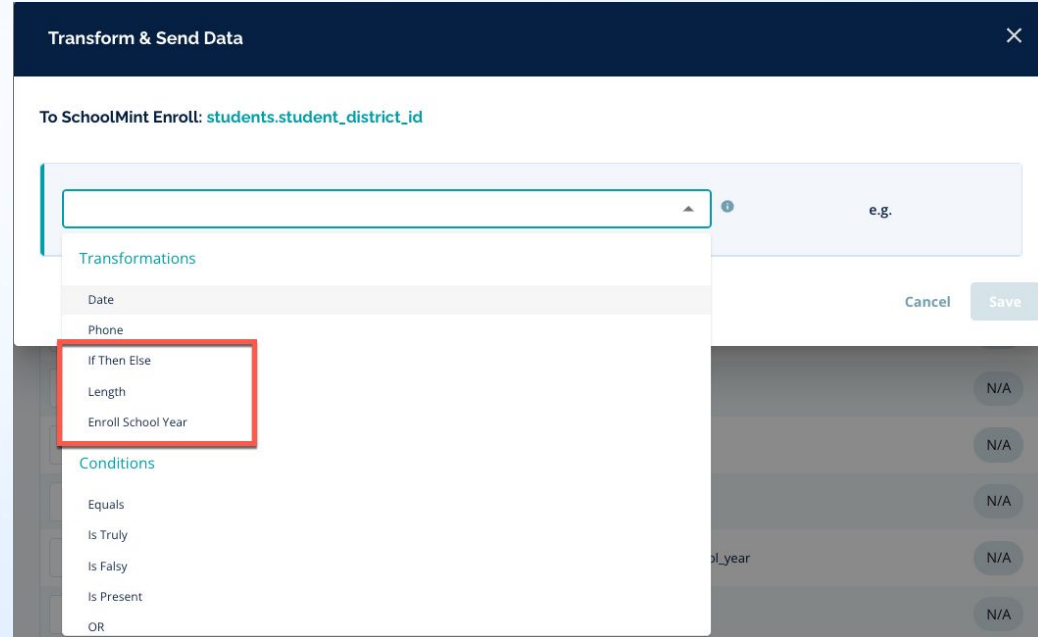
Sync Service got an **Uphaul!** (Upgrade and Overhaul!)
Based on feedback and UX Team input, we updated Sync Service's UI and streamlined some workflows to make them more consistent and user friendly.



Sync Service: Transformations

Added several new transformations to help with import/export field mappings:

- If Then Else to create conditional logic between fields
- Length to get the number of characters in a field to use for a condition
- Enroll Year shows school year selected in Enroll when admin logged in to Sync Service (no need to update school year mapping each year)
- Email validation is no longer case-sensitive



Sync Service: Table Lookup Refactor

We made the table lookup feature/workflow more user friendly! Reminder: We use this feature to map to Contacts because in many systems, there are multiple contact records for each student record, so we need to tell the system which contact record goes where in Enroll.

The screenshot displays a configuration interface for mapping data to a 'To SchoolMint Enroll Field'. The interface includes a header with navigation and control options, and a table of field mappings. A tooltip 'Configure Lookup' is active over the first row, and another tooltip 'Lookup Set: Primary Guardian' is active over the third row.

< Mapped Value >		<input type="checkbox"/> Overwrite <i>i</i>			
N/A	<input type="checkbox"/>	Configure Lookup			
To SchoolMint Enroll Field					
< Mapped Value >		<input type="checkbox"/> Overwrite <i>i</i>			
[CON.F...]	Direct	student_annual.guardian1_fname	N/A	<input type="checkbox"/>	<i>⋮</i>
STU.LN ...	Direct	student_annual.guardian1_lname	N/A	<input type="checkbox"/>	Lookup Set: Primary Guardian
[CON.EM] X	Direct	student_annual.guardian1_email	N/A	<input type="checkbox"/>	<i>⋮</i>
	Direct	student_annual.guardian1_phone	N/A	<input type="checkbox"/>	<i>⋮</i>
	Direct	student_annual.guardian1_phone2	N/A	<input type="checkbox"/>	<i>⋮</i>
	Direct	student_annual.guardian1_address	N/A	<input type="checkbox"/>	<i>⋮</i>
	Direct	student_annual.guardian1_address2	N/A	<input type="checkbox"/>	<i>⋮</i>

Sync Service: Registrations Table

Added columns on the Registrations table to show the Sync Status and Last Sync date and time. Hover over Failed status to see error message.

New fields are available in Report Builder as well for the registration record:

- `sis_export_status`
- `sis_export_timestamp`

Filter by Status

Show Registrations:

Submitted Not Submitted

With Status:

Approved Denied In Processing

Submission Date Range:

From To

Withdrawn:

Withdrawn Not Withdrawn

Sync Status:

Succeeded Pending Failed Action Required In Progress Partially

Last Sync:

From To

Student#	Full Name	DOB	School	Grade	Deliverables	Date	Sync Status	Last Sync	Actions
66554488	Mario Johnson	2012-10-01	Fir Elementary School	1		2020-12-02 11:11:32	Pending	2022-08-18 02:59:23	  
148577747	Savannah Johnson	2012-10-01	Fir Elementary School	1		2020-12-04 13:41:03	Pending	2022-08-18 02:59:23	  

Sync Service: Registration ID

Added Registration ID to the Export Configure page and the Sync Log to indicate a unique registration record for a student.

For troubleshooting, you can get the Registration ID by running a report that includes ID from the Registration data model or by finding it in the URL when viewing a registration.

FIELD MAPPING

Registration Examples

Registration Example - 1 2457	Student Example - 1 255756
Registration Example - 2 2456	Student Example - 2 255750
Registration Example - 3 2455	Student Example - 3 255749
Registration Example - 4 2454	Student Example - 4 255748
Registration Example - 5 2453	Student Example - 5 255747

Export Dashboard

0 IN PROGRESS 0 ACTION REQUIRED

Filter By:

Student Name

Registration ID **Student ID**

Sync ID	Registration ID	Student ID
2404649	2438	255682
2404650	2439	255685

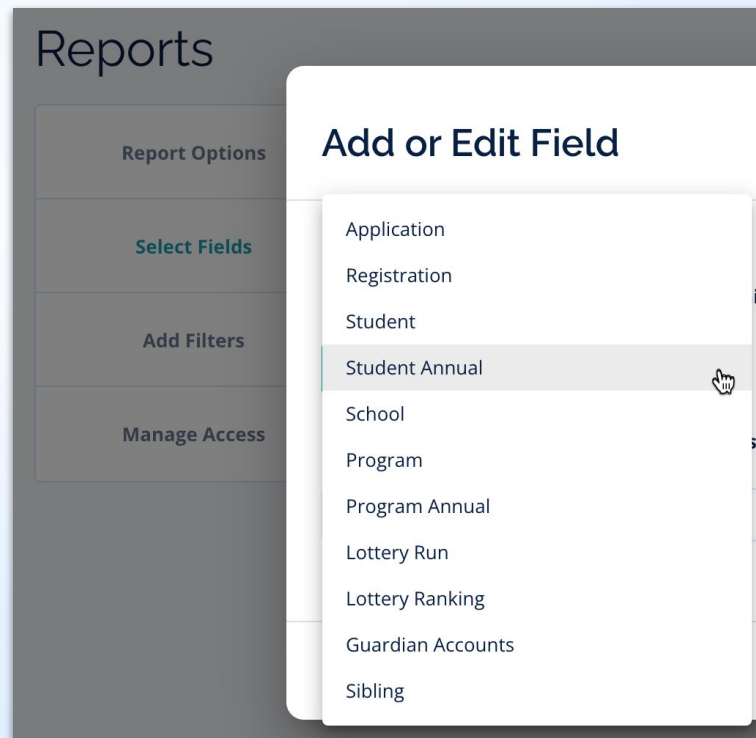
Report Builder

Added Data Models and Report Design Validation!

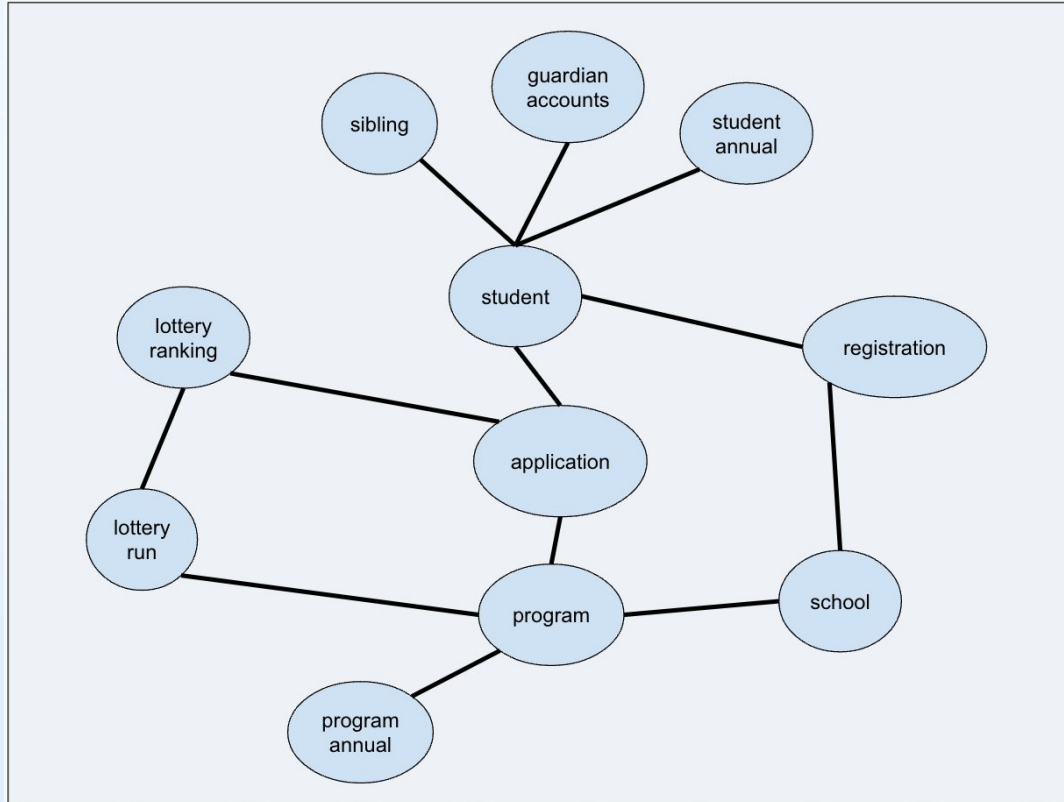
Report Builder: Data Models

Added available data models to use to design a report:

- School
- Program
- Program Annual
- Lottery Run
- Lottery Ranking
- Guardian Accounts
- Sibling



Report Builder: Data Models



Report Builder: Report Validation

How hard can it be to build a report with all these tables/fields to choose from?

Issue: It's easy to build a report that won't run because it's missing data. For example, a report with Students and also Schools won't run without Apps or Reg!

Solution: Report Validation

Report Builder helps you choose valid data models/fields!



Report Builder: Report Validation

1) Choose a data model and field to start your report.

The screenshot shows a software interface titled "Report Builder: Select Fields". It features a modal window titled "Add or Edit Field" with a close button (X) in the top right corner. On the left side of the modal, there is a vertical list of data models: Application, Registration, Student, Student Annual (highlighted), School, Program, Program Annual, Lottery Run, Lottery Ranking, Guardian Accounts, and Sibling. To the right of this list, the text "is report:" is followed by two dropdown menus: "Select Form Process" (with "Show All Fields" selected) and "Select Field *". Below these, the text "isplayed in the report:" is partially visible. At the bottom right of the modal, there are two buttons: "Cancel" and "Save Field" (which is highlighted in green).

Report Builder: Report Validation

2) Add another field and see the data models available to choose from (and those not available are greyed out!).

Example: to add a field from School, you have to add a field from Application or Registration first.

Add or Edit Field ✕

- Application
- Registration
- Student
- Student Annual
- School
- Program
- Program Annual
- Lottery Run
- Lottery Ranking
- Guardian Accounts
- Sibling

is report:

Select Form Process: Show All Fields ▼ Select Field * ▼

isplayed in the report:

Cancel Save Field

Report Builder: Report Validation

3) As you add fields to your report from different data models, you'll see the list of available models change accordingly.

Example: After you add Reg ID to your report, you'll see School appear as an option. Add School and you can add Program, and so on. (Magic!)

Add or Edit Field [Close]

Application
Registration
Student
Student Annual
School [Hand cursor]
Program
Program Annual
Lottery Run
Lottery Ranking
Guardian Accounts
Sibling

is report:

Select Form Process
Show All Fields [Dropdown]

Select Field * [Dropdown]

Displayed in the report:

Cancel [Save Field]

Report Builder: Report Validation

The report validation will run when you modify a report as well. Give it a try!

Reports

Super Helpful Report [Edit Report](#) [Export Data](#)

fname	lname	address	reg_id	school_code
Betty	Huang	102 WAYSIDE DR		
Amber	Coats	100 WELLS ST	2409	22
Maggie	Coats	100 WELLS ST	2410	11
Roberta	Hernandez	100 WELLS ST	2411	22
Anthony	Coats	100 WELLS ST	2412	15
Peter	Broussard	100 WELLS ST	2413	22
Anthony	Coats	100 WELLS ST	2414	22
Joseph	Paul	101 CRYSTAL LN	2415	22
Anthony	Jacket	100 HARWELL DR	2416	1
Lakely	Juneau	101 CLOVER LEAF DR	2417	19
Jason	Juneau	101 CLOVER LEAF DR	2418	4
Luke	Prejean	101 CLOVER LEAF DR	2419	19
Janele	Reardon	1211 W PINHOOK RD	2420	1
Jake	Jones	1211 W PINHOOK RD	2421	1

Report Builder: Default Column Name

Such a small change but....

Who else is glad that the report column heading now defaults to the field name?

1. Select a field you would like to display in this report:

Select Record Select Form Process Select Field *

2. Enter how you would like this field to be displayed in the report:

Display Field *



Report Builder What's Next

Report Builder In Progress:

- Schedule Report Export
- New UI/UX for Designing Reports
- Report Views (Saved Snapshots)
- Default Reports



A smiling woman with curly hair, wearing a patterned top, is holding a tablet and looking towards the camera. She is in a classroom setting with other students visible in the background. The image has a blue and green color overlay.

Enroll User Guide 1.0

Customer-facing admin user guide for SchoolMint Enroll



Enroll User Guide

Launching an admin-facing user guide built using Confluence.



Enroll User Guide

▼ Enroll Product Releases

- Release 1.8
- Release 1.7 - July 15, 2022
- Release 1.6 - May 27, 2022
- Release 1.5 - May 6th, 20...
- › Release 1.4 - April 1, 2022

› Guardian Portal

› Students

› Applications

› Lotteries

› Users

› Configuration

▼ Sync Service

- Ad hoc CSV Connection
- SFTP Connection

SchoolMint Enroll **User Guide**



The Enroll User Guide has the basic information for using SchoolMint Enroll.

Use the navigation on the left or the search field below to find the content you need!



Recently updated

You'll see the 5 most recently updated pages



[SchoolMint Enroll - Information Center](#)

36 minutes ago · contributed by rarecco



[Release 1.8](#)

about an hour ago · contributed by Greg Willey



[Recommendations](#)

about 5 hours ago · contributed by Greg Willey



[Enroll Product Releases](#)

about 5 hours ago · contributed by Greg Willey



[Release 1.4 - April 1, 2022](#)



Enroll User Guide

The screenshot shows the 'Student Applications' page in the SchoolMint Enroll system. The top navigation bar includes 'SchoolMint Enroll' and a menu with 'Dashboard', 'Students', 'Applications', 'Lotteries', 'Registrations', 'Reports', 'Scheduling', and 'Users'. The 'Applications' tab is active. The main content area is titled 'Student Applications' and features three filter panels: 'Filter by Status', 'Filter by Application Attribute', and 'Filter by Student Attributes'. The 'Filter by Status' panel includes options for 'Submitted' (checked), 'Eligible', 'Not Submitted', 'Ineligible', and 'In processing'. The 'Submission Date Range' section has 'From' and 'To' date pickers. The 'Withdrawn' section has 'Withdrawn' and 'Not Withdrawn' (checked) options. The 'Lotteries' section has 'Lottery List' and 'Lottery Status' dropdowns. The 'Filter by Application Attribute' panel includes dropdowns for 'Form Process', 'School', 'Grade', 'Category', 'Program', 'Priority', and 'Recommendations'. The 'Filter by Student Attributes' panel includes a search box for 'Search by Student Name or Student ID' and a 'Flags' dropdown. At the bottom right, there are 'Clear All Filters' and 'Apply Filters' buttons. A yellow callout box with the text 'Access the Enroll User Guide through the Need Help panel.' has an arrow pointing to a vertical 'Need Help?' panel on the right side of the page.

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Student Applications

Filter by Status

Show applications: **With Status:**

Submitted Eligible

Not Submitted Ineligible

In processing

Submission Date Range:

From To

Withdrawn:

Withdrawn Not Withdrawn

Lotteries:

Lottery List Lottery Status

Filter by Application Attribute

Form Process

School

Grade

Category

Program

Priority

Recommendations

Filter by Student Attributes

Search by Student Name or Student ID

Flags

Clear All Filters Apply Filters

Need Help?

Access the Enroll User Guide through the Need Help panel.

Enroll User Guide

Click Enroll User Guide.

The screenshot shows a 'Filter by Student Attributes' window with a help overlay. The help overlay is titled 'How can we help you?' and includes a search bar and a list of help topics. The 'Enroll User Guide' topic is highlighted by an orange arrow from a callout box on the left. Below the help overlay, there are 'Clear All Filters' and 'Apply Filters' buttons.

Attribute | Filter by Student Attributes

How can we help you?

Help | Onboarding | Internal Help

Type in your question...

- Enroll User Guide**
Technical information for using SchoolMint Enroll.
- Dashboard Overview**
A quick overview of the Dashboard module.
- Students Overview**
A quick overview of the Manage Students module.
- Registration Overview**

Enroll Help Desk | walkme

Clear All Filters | Apply Filters

Enroll User Guide

Enroll User Guide

- Release 1.5 - May 6th, 20...
- › Release 1.4 - April 1, 2022
- › Guardian Portal
- › Students
- › Applications
- › Lotteries
- › Users
- › Configuration
- ▼ Sync Service
 - Ad hoc CSV Connection
 - SFTP Connection
 - API Connection
 - Contact Mapping
 - Schedule Imports and Ex...
 - Application Import
 - Transformations

Navigate content using the page tree.

SchoolMint Enroll User Guide

The Enroll User Guide has the basic information for using SchoolMint Enroll. Use the navigation on the left or the search field below to find the content you need!

Search for an article

Search for a topic.

Recently updated

You'll see the 5 most recently updated pages that you and your team create.

SchoolMint Enroll - Information Center

36 minutes ago • contributed by rarecco

Release 1.8

about an hour ago • contributed by Greg Willey

Recommendations

about 5 hours ago • contributed by Greg Willey

Enroll Product Releases

about 5 hours ago • contributed by Greg Willey

Release 1.4 - April 1, 2022

about 5 hours ago • contributed by Greg Willey

Show More

Enroll User Guide

Find helpful content for admin users.

More content will be added asap over time.

The screenshot displays the Enroll User Guide interface. On the left is a navigation sidebar with a search icon and a plus sign. The sidebar title is 'Enroll User Guide'. The menu items are: Scheduling, Users, Configuration, Sync Service (expanded), Ad hoc CSV Connection, SFTP Connection, API Connection, Contact Mapping, Schedule Imports and E... (highlighted), Application Import, Transformations, Sync Service Notes, and Sync Service Troublesho... At the bottom of the sidebar is an 'Archived pages' section with a folder icon. The main content area has a breadcrumb 'Enroll User Guide / Sync Service' and a search icon. The article title is 'Schedule Imports and Exports'. It is attributed to Greg Willey, created on Jul 28, 2022, with a 1-minute read time and 2 viewers. The article text states that before scheduling imports or exports, an SFTP or API connection to Sync Service must be set up. The article includes two sections: 'Schedule Nightly Import (API and SFTP connections)' and 'Schedule Nightly Export (SFTP connection)'. The 'Schedule Nightly Import' section lists six steps: 1. Click the Settings (gear) icon at the top right corner of the page. 2. Choose Sync Service on the left navigation menu. 3. Enable "Schedule Nightly Import" by clicking the toggle to the right of the section title. 4. Enable the import for a non-production environment (Staging or Beta) by clicking the toggle to the right of the environment name. This export will turn off after the import runs 1 time. 5. Set the "Time of Day" you want the data to be imported. 6. Click Submit.

Schedule Imports and Exports



Created by Greg Willey

Last updated: Jul 28, 2022 • 1 min read • 👁 2 people viewed

Prior to scheduling imports or exports you must set up an [SFTP](#) or [API](#) connection to Sync Service.

Schedule Nightly Import (API and SFTP connections)

To schedule nightly imports:

1. Click the Settings (gear) icon at the top right corner of the page.
2. Choose Sync Service on the left navigation menu.
3. Enable "Schedule Nightly Import" by clicking the toggle to the right of the section title.
4. Enable the import for a non-production environment (Staging or Beta) by clicking the toggle to the right of the environment name. This export will turn off after the import runs 1 time.
5. Set the "Time of Day" you want the data to be imported.
6. Click Submit.

Schedule Nightly Export (SFTP connection)

To schedule nightly exports of registration records:



Connect

Connect Update



Connect

- Connect - A CRM tool
- Provides a platform for Orgs to communicate with prospective families
- Provides analytics to Orgs based on which they can make business decisions.
- Currently available for Single Site Orgs
- Multiple school org functionality targeted for a winter release

Connect

Connect - Admin/Org Facing UI

The screenshot shows the SchoolMint Connect Admin/Org Facing UI. The top navigation bar includes the SchoolMint Connect logo, a 'Dashboard' button, and a 'selected school' dropdown menu set to 'Minty School'. There are also icons for user profile, notifications, help, and logout. The main content area features a 'Funnel Metrics' section with filters for 'Starting Year' (2023 - 2024) and 'Grade Level' (9th Grade, 10th Grade, 12th Grade). A funnel chart displays the following data:

Stage	Count
Total Inquiries	74
Reached Applicant Stage	40
Reached Enrollment Stage	0

Below the funnel chart is a 'Total by Stage' section.

Connect - Parent Facing UI

The screenshot shows the SchoolMint Connect Parent Facing UI website. The top navigation bar includes social media icons, a phone number (800) 396-1615, and a navigation menu with links for HOME, ABOUT US, PROSPECTIVE FAMILIES (with a dropdown menu), CURRENT FAMILIES, JOIN OUR TEAM, and ENROLL TODAY!. The dropdown menu for PROSPECTIVE FAMILIES contains the following options:

- REQUEST AN INFORMATION PACKET
- VISIT OUR SCHOOL!
- CONTACT US

The main content area features a large image of a colorful playroom with a wooden play structure and a green slide. Overlaid on the image is the text 'DISCOVER THE MINTY WAY!' and 'PREK-12 School'. A blue button labeled 'Apply Online Today!' is positioned below the text.

Connect 1.3.1 July Release

- Enroll to Connect nightly sync
- Sends student records from Enroll to Connect with their app/reg status
- Note: does not support multiple school orgs yet (future release targeted by eoy)

Happy Back to School!

