

 **SchoolMint** Enroll

1.9 Amazing Features

2022 Summer Series Finale: Dynamic Views Part 2,
UI/UX Improvements, Schedule Export for Reports and more!

Feature Walkthrough / Product & Engineering



Targeted for September 30, 2022

Enroll 1.9 New Features

- Sandbox Environment
- Dynamic Views: Customizable Columns
- Calculated Fields Updates
- Usability and UX Improvements
- Download Forms includes hiding fields hidden by Conditional Fields
- Auto-Denial for Reg: Fixes and Warning Email
- Reports: Schedule Export, Recommendations
- User Guide for Admins

Staging > Sandbox

Staging is Moving to SANDBOX

Please use [\[org\].sandbox.schoolmint.com](#) starting 9/30.

- Sandbox will have the same data, permissions, and refresh schedule as the current Staging environment (just a different URL).
- **Do not use Staging as of 9/30**
SchoolMint will use Staging for internal testing, it will often be down, and will not be supported.

Calculated Fields Updates

Calculated Fields Updates

- Corrected known issue - Conditional fields used with the calculated fields: An update was made to better handle fields that are used in the calculation engine that are set as a conditional field. While the update is able to resolve basic errors admins should always check their calculation for accuracy when using conditional fields as part of the calculation.
- Corrected known issue - Duplicating a calculated field type. In order to prevent broken calculations, duplicating a calculated field type will only be allowed when duplicating that field for the same active year and same form process.
 - A step with a calculation field type can still be duplicated however the fields need to be added back to the calculation engine. Because a calculation can be built using fields across multiple steps we cannot assume all steps containing all fields were copied. This is being evaluated for consideration in a future release.

Dynamic Views: Part 2

Dynamic Views: Customizable Columns

- Dynamic Views: Customizable Columns allows admins to create custom table views for each of their views that they have created on the application and registration tables.
- Admin users can define a default view.
- Ability to export from the application and registration tables.
- Auto-collapse quick filters for better user experience.

Dynamic Views: Customizable Columns

Academy | undefined: SY 2021-2022 Elizabeth Briney 2021-2022

Name this View*
Reading Scores

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

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

Filters Applied: Add Filters

| Field | Operator | Value | Actions |
|---------------|--------------|-------|---------|
| reading_score | IS LESS THAN | 80 | |

Sort Data By:
Select Field
Reading Score (reading_score)

Ascending Descending

Customize Columns: Add Columns

| Order | Column Label | Field | Actions |
|-------|--------------|-----------|---------|
| | App# | id | |
| | Full Name | full_name | |

Define a column to sort the view using ascending or descending options

Add columns to your view and arrange your preferred order. Limit of 20 columns per view.

Dynamic Views: Customizable Columns

| | | | | |
|---|-------------|---------------|---|---|
| 🔒 | App# | id | ✎ | 🗑 |
| 🔒 | Full Name | full_name | ✎ | 🗑 |
| = | Rank | choice_rank | ✎ | 🗑 |
| = | Category | category_name | ✎ | 🗑 |
| = | Program | | ✎ | 🗑 |
| = | Grade | | ✎ | 🗑 |
| = | Final Score | | ✎ | 🗑 |
| = | Date | | ✎ | 🗑 |

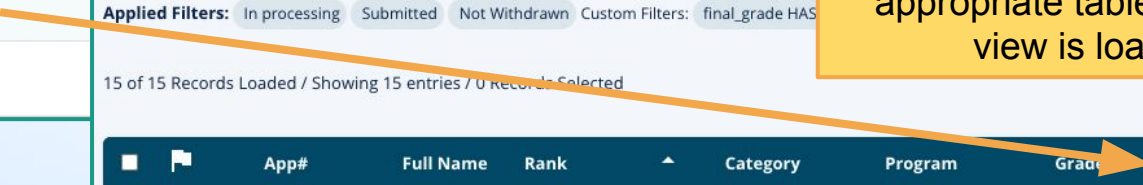
Bulk Action Apply Saved View In Processin...

Applied Filters: In processing Submitted Not Withdrawn Custom Filters: final_grade HAS

15 of 15 Records Loaded / Showing 15 entries / 0 records Selected

| 🗑 | 🚩 | App# | Full Name | Rank | ▲ | Category | Program | Grade | Final Score | | Actions | |
|--------------------------|---|---------|--------------------|------|---|--------------------|-----------------------|-------|-------------|------|--------------------------|----------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | | 3339528 | Betty Greer | 1 | | Choice Schools | East West - IB Pro... | 7 | 82 | 2022 | <input type="checkbox"/> | <input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑"/> |
| <input type="checkbox"/> | 🚩 | 3339630 | Connie Stevens | 1 | | Choice Schools | East West - IB Pro... | 6 | 103 | 2022 | <input type="checkbox"/> | <input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑"/> |
| <input type="checkbox"/> | 🚩 | 3394317 | Amber Adams | 1 | | Neighborhood Sc... | East WestMiddle | 6 | 0 | 2022 | <input type="checkbox"/> | <input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑"/> |
| <input type="checkbox"/> | 🚩 | 3394341 | Penny Zuniga | 1 | | Neighborhood Sc... | East WestMiddle | 6 | 42 | 2022 | <input type="checkbox"/> | <input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑"/> |
| <input type="checkbox"/> | | 3408419 | Jessica Richardson | 1 | | Choice Schools | Westbrook Leader... | 11 | 12 | 2022 | <input type="checkbox"/> | <input type="button" value="👤"/> <input type="button" value="✎"/> <input type="button" value="🗑"/> |

Columns will display on the appropriate table when the view is loaded.



Dynamic Views: Export

Student Applications: SY 2021-2022

Export

3

4

4

applications_2022-09-15 08_34_01















| App# | Full Name | Rank | Category | Program | Grade | Final Score | Date |
|---------|----------------|------|----------------------|------------------------|-------|-------------|---------------------|
| 3339528 | Betty Greer | 1 | Choice Schools | East West - IB Program | 7 | 82 | 2022-02-09 16:08:39 |
| 3339630 | Connie Stevens | 1 | Choice Schools | East West - IB Program | 6 | 103 | 2022-02-22 12:38:11 |
| 3394317 | Amber Adams | 1 | Neighborhood Schools | East WestMiddle | 6 | 0 | 2022-03-11 12:16:42 |
| 3394341 | Penny Zuniga | 1 | Neighborhood Schools | East WestMiddle | 6 | 42 | 2022-03-17 08:26:33 |

- Admins have the ability to export data from the application and registration tables.
- The export will be based on the columns defined for the view being exported.
- Export is stored as a CSV
- Export naming convention is `tablename_date(YYYY_MM_DD)`

Dynamic Views: Set a Default View

Saved Views

Back

| Saved View Name | Access | Created By | Default View | Actions |
|---------------------------------|-----------------|------------------|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Standard View | Globally Shared | System | <input checked="" type="radio"/> | |
| Reading Scores | | | <input type="radio"/> |   View |
| Scores for Review | | | <input type="radio"/> |   View |
| Eligible Score | | | <input type="radio"/> |   View |
| Math Score | | | <input type="radio"/> |   View |
| Grade 6 | | | <input type="radio"/> |   View |
| Additional Income | | | <input type="radio"/> |   View |
| In Processing Scores for Review | Globally Shared | Elizabeth Briney | <input type="radio"/> |   View |

Admins can set a default view.

- The set default will be specific to each admin user.
- When a default view is set it will automatically load on the defined table.
- A standard view has been created based off of the current table columns available.

Admins can load a created view from the Saved Views screen.

Collapse Quick Filters

108

TOTAL STUDENTS

140

TOTAL APPLICATIONS

140

SUBMITTED APPLICATIONS

Quick Filters 

Bulk Action 

Search by Student Name



Apply Saved View
Standard View 






Add Filters

Save View

Applied Filters: Submitted Not Withdrawn

140 of 140 Records Loaded / Showing 140 entries / 0 Records Selected

Quick filters can be collapsed allowing admins to access the data with less scrolling. The table will automatically load with the filters collapsed.

| <input type="checkbox"/> |  | App# | Full Name  | Rank | Category | Program | Grade | Sib | Priority | Recommendator | Actions |
|--------------------------|-----------------------------------------------------------------------------------|--------|---------------------------------------------------------------------------------------------|------|----------------|--------------|-------|-----|----------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | | 462156 | Adrienne Banks | 1 | Choice Schools | Puppy School | 6 | | 4 | |    |

Reset Filters



- Clear All Filters has been updated to Reset Filters
 - The behavior of the button did not match with the label.
 - When using Reset Filters the table will return back to the standard view.

Display Applied Filters

3

TOTAL STUDENTS

4

TOTAL APPLICATIONS

4

SUBMITTED APPLICATIONS

Quick Filters 

Bulk Action 

Search by Student Name



Apply Saved View
Standard Vi... 






Add Filters

Save View

Applied Filters: Submitted Not Withdrawn Eligible In processing Form Process: Choice Application Grade: 3 4 5

All applied filters will be displayed

4 of 4 Records Loaded / Showing 4 entries / 0 Records Selected

| <input type="checkbox"/> |  | App# | Full Name  | Rank | Category | Program | Grade | Sib | Priority | Recommendation | Actions |
|--------------------------|-----------------------------------------------------------------------------------|---------|---------------------------------------------------------------------------------------------|------|---------------------------------|---------|-------|-----|----------|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | | 3394352 | Cheyenne Agu... | 3 | Choice Schools East West Mid... | | 5 | | 4 | 1 Not completed |    |



UI/UX Improvements

Dropdown Menu Improvements (Admin & Guardian Flows)

Student Home Address State

- AL
- AK
- AZ
- AR
- CA
- CO

Student Home Address State

- CA

Student Home Address State

✕

- Combo fields / Autocomplete filter
- Dynamic menu
- Ability to delete selection
- Works much better in mobile (smooth)

Prominent School Year

(org's name) SchoolMint Academy Student Applications: SY 2022-2023

Renzo Arecco 2022-2023

SchoolMint Enroll Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Student Applications: SY 2022-2023 [Export](#)

| | | |
|-------------------------|-----------------------------|---------------------------------|
| 1,204 TOTAL STUDENTS | 2,605 TOTAL APPLICATIONS | 2,605 SUBMITTED APPLICATIONS |
|-------------------------|-----------------------------|---------------------------------|

Quick Filters

Bulk Actions Search by Student Name

Apply Saved View Add Filters Save View

Prominent School Year

(org's name) SchoolMint Academy | Student Applications: SY 2023-2024

Renzo Arecco ▾ 2023-2024 ▾ ⚙️

SchoolMint Enroll

Dashboard Students Applications Lotteries Registrations Reports Scheduling Users

Student Applications: **SY 2023-2024** ← Export

| | | |
|--------------------------------|------------------------------------|----------------------------------------|
| 1,204 TOTAL STUDENTS | 2,605 TOTAL APPLICATIONS | 2,605 SUBMITTED APPLICATIONS |
|--------------------------------|------------------------------------|----------------------------------------|

Quick Filters ▾

Bulk Actions ▾ Search by Student Name 🔍 Apply Saved View ▾ Add Filters Save View

Prominent School Year (Guardians)

SchoolMint Academy: Welcome Michael Abbott: SY 2022-2023



Dashboard



Messages



English



Michael Abbott

2022-2023

 SchoolMint Enroll

Welcome Michael Abbott: SY 2022-2023

Click the child's card to manage (org name goes here) applications and enrollment forms.

Katherine Abbott

 5 Applications Submitted

View Submitted Forms



 Application Name In Progress

Continue



 Application Name In Progress

Continue



Daniel Abbott

No records for the 2021-2020 school year

Add Form(s)

Michael Jr. Abbott



 Choice Application In Progress

Continue



Lorenzo Abbott

No records for the 2021-2020 school year

Add Form(s)

Prominent School Year (Guardians)

2022-2023

[View Steps](#)

Choice Application: **SY 2022-2023**

Guardian Information

2/8

We will now need to collect information about the applicant's guardian(s).

With whom does the applicant live?

Mother Only

2023-2024

[View Steps](#)

Choice Application: **SY 2023-2024**

Guardian Information

2/8

We will now need to collect information about the applicant's guardian(s).

With whom does the applicant live?

Mother Only

Guardian #1

First Name*

Last Name*

Relation*

Parent

Preferred Contact Number*

Mobile

Home

Save & Exit

Save & Continue >

Show/Hide Form Process Steps

The image illustrates a user interface for a mobile application, showing a transition from a specific form step to a list of all form steps.

Left Panel (Form Step):

- Top bar: 2022-2023 (dropdown)
- Back arrow
- Choice Application: SY 2022-2023
- Section Title: **Guardian Information**
- Progress indicator: 2/8
- Message: We will now need to collect information about the applicant's guardian(s).
- Form field: With whom does the applicant live? (Dropdown menu showing "Mother Only")
- Button: [View Steps](#) (highlighted with an orange box and arrow)

Right Panel (All Form Steps):

- Header: All Form Steps (with close button)
- List of steps:

| Step Number | Step Name | Status |
|-------------|------------------------------|-----------------------------|
| 1. | Student Information | Completed (Green checkmark) |
| 2. | Guardian Information | Completed (Green checkmark) |
| 3. | Siblings | In Progress (Orange circle) |
| 4. | Select Programs | Pending |
| 5. | Rank Selected Programs | Pending |
| 6. | 11th & 12th Grade Transcript | Pending |
| 7. | Signatures | Pending |
| 8. | Review & Send | Pending |

Global Lottery Settings

Lotteries

Content/Letters

Custom Data

Forms

Guardian Theme

Roll Over

Sync Services

Boundaries

Accept/Decline Placement

- Allow guardians to accept/decline seats from dashboard


Auto-Decline

- Auto-decline a student's other applications on Offered Lists once a seat is accepted
- Auto-decline **APPLICATIONS** if **OFFER** is not accepted by:

Days After Published Offer  and/or Date  at Time of Day 

If the "Days After Published Offer" extends past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

- Auto-decline **APPLICATIONS** if **REGISTRATION** is not submitted by:

Days After Accepting Seat  and/or Date  at Time of Day 

If the "Days After Accepting Seat" extend past the date in the "Date" field, then the auto-decline occurs on the earlier of the two dates.

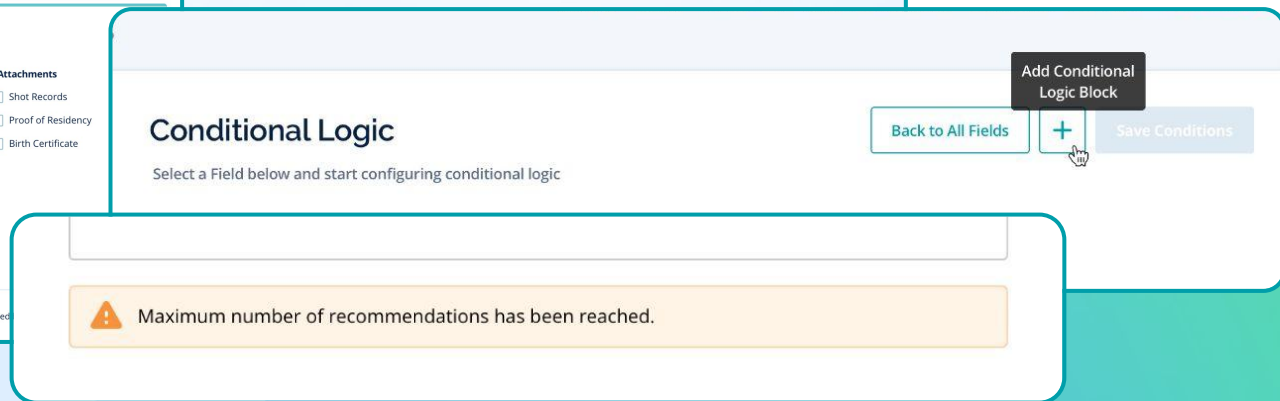
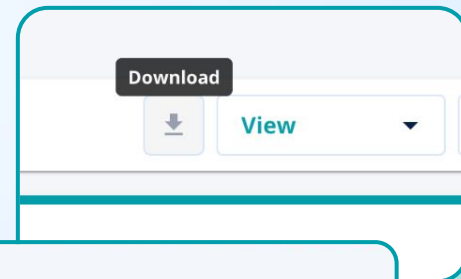
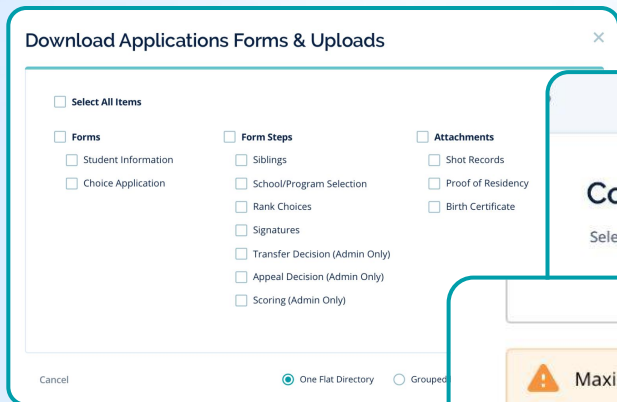
These options affect auto-decline settings:

- Send a reminder email and/or text message to guardians before an application is auto-declined

Days Before Auto-Decline*  at Time of Day 

Various Usability Updates

- Conditional fields: “Add” button
- Download forms modal
- Download icon/button instead on Print button
- Export Schedule Button Removed
- Recommendation limit reached banner



Additional Fixes and Feature Polishing

- Auto-Denial for Registration
 - Warning Email (Uses same setting that already exists for Auto-Denial for Applications)
 - Fixes related to the Registration Expiration Date
- Download Forms/Attachments hides fields that are hidden based on the Conditional Fields feature.

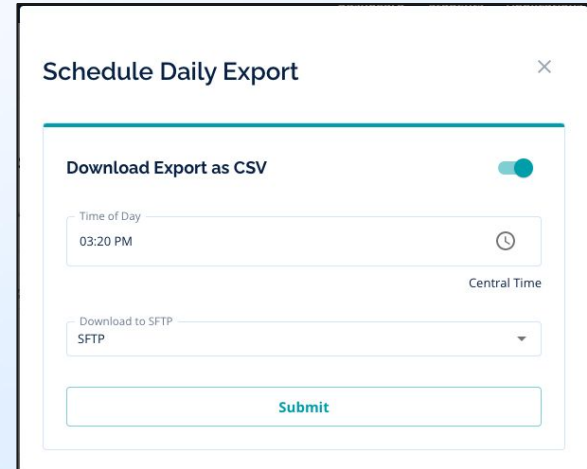
Reporting & Sync Improvements

Schedule and Export a Report

You now have the ability to:

- Schedule an Export of Reports from the Report Builder
- Download the Export as a CSV to SFTP Server

Note: An SFTP Connection in Sync Service needs to exist for this feature



Recommendations Reporting

- Adding Recommendations to Report Builder asap per customer feedback
- Has some limitations:
 - Accessible only to Super Admins
(can't honor programs permissions)
 - May not have all fields/functionality users will want
- We'll make improvements for winter release

Sync: School Year in Header

- Shows Session School Year in Sync header
- Shows red when not default school year
- Gets SY from Enroll when you log in to Sync
- Does not update automatically if you change school years in Enroll (would need to log in to Sync again)

Additional Features

- Delete functionality in Sync Table Lookup
- Action Required changed to Failed (with error message)
- UI/UX enhancements to Report Builder

All the saved conditions will be available under the "Table lookup" column in the fields configuration.

Select or Add New Condition

Guardian 1



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

Select Record *

Student Annual



Select Form Process

Show All Fields

Application

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

report?



Enroll User Guide

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 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

Enroll User Guide

The screenshot shows the 'Student Applications' page in the SchoolMint Enroll system. The top navigation bar includes 'SchoolMint Enroll' and several menu items: Dashboard, Students, Applications, Lotteries, Registrations, Reports, Scheduling, and Users. The main content area is divided into three filter sections: 'Filter by Status', 'Filter by Application Attribute', and 'Filter by Student Attributes'. The 'Filter by Status' section includes checkboxes for 'Submitted', 'Not Submitted', 'Eligible', 'Ineligible', and 'In processing', along with a 'Submission Date Range' selector and 'Withdrawn' checkboxes. The 'Filter by Application Attribute' section has dropdown menus for 'Form Process', 'School', 'Grade', 'Category', 'Program', 'Priority', and 'Recommendations'. The 'Filter by Student Attributes' section has a search box for '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 WalkMe Help panel.' has an arrow pointing to a vertical 'Need Help?' button 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 WalkMe 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 contains 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

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



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](#)

Navigate content using the page tree.

Enroll User Guide

Find helpful content for admin users.

More content will be added over time.

The screenshot displays the Enroll User Guide interface. On the left is a navigation menu with the following items: 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 menu is an 'Archived pages' section. The main content area is titled 'Enroll User Guide / Sync Service' and features a page header 'Schedule Imports and Exports' created by Greg Willey, last updated on Jul 28, 2022, with a 1-minute read time and 2 people viewed. The page content includes a paragraph stating that SFTP or API connections must be set up before scheduling imports or exports. It then provides a section for 'Schedule Nightly Import (API and SFTP connections)' with a list of 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. Below this is a section for 'Schedule Nightly Export (SFTP connection)' with the text 'To schedule nightly exports of registration records:'.

Enroll User Guide / Sync Service

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:

Thank You!

Rock Enroll!

