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EDlumina Admissions One-Click Reporting Guide

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Dashboard Reporting

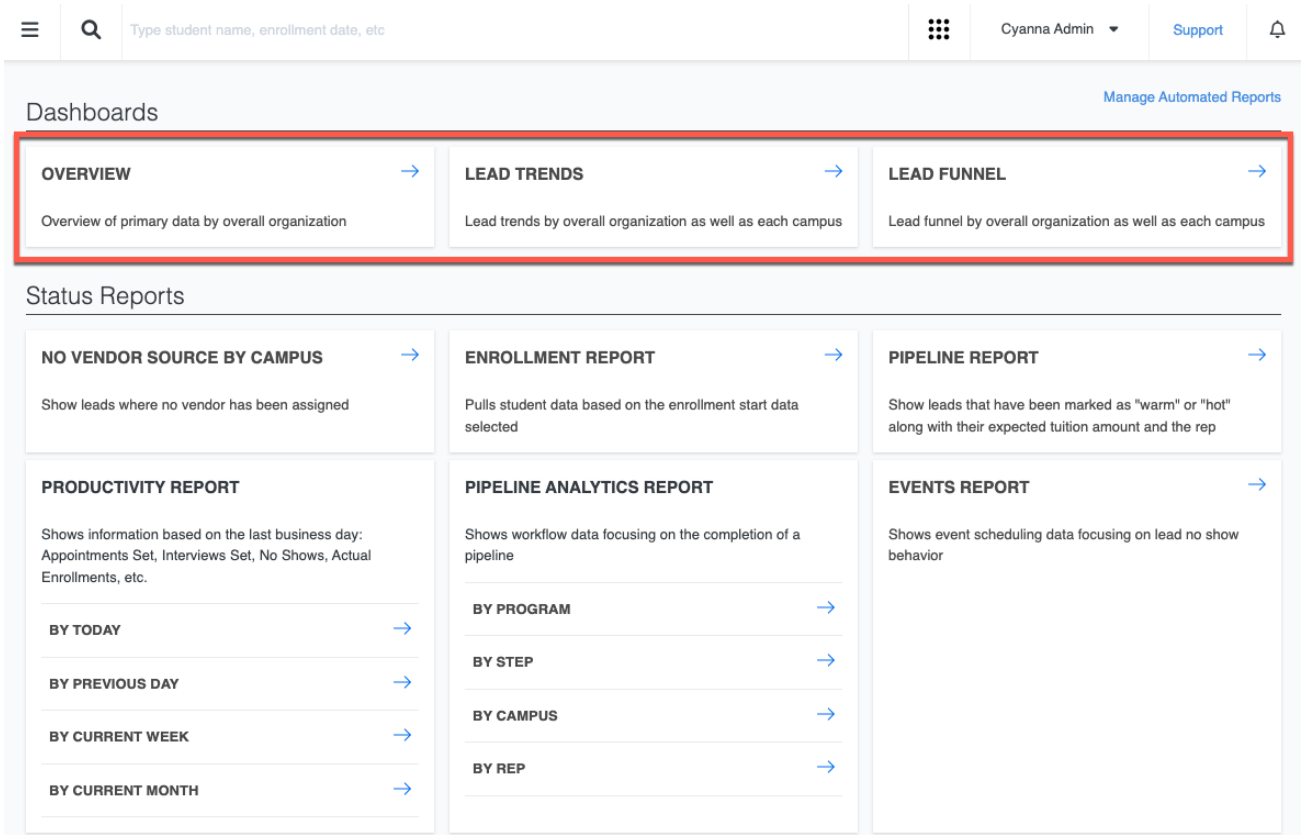

Fig.1.0.A: Shows the three reports you can navigate under the Dashboard

Overview

Overview of primary data by overall organization

- Overview details data for the institution as a whole as well as for campus-specific information.

Overview Panel - The top-left panel will show you Goals, Enrolled leads, Starts, and No Starts by year for each quarter.

Campus Panel - The rest of the panels will allow you to filter down by campus programs

- How to populate the numbers:
  - Goal = Goal total for that campus for the date range selected. Goal is found in Programs > Cohorts.
    - This will pull the sum for cohorts start date on the date range selected
  - Enrolled = Total number marked as enrolled (and still enrolled) for that date range
  - Starts = the new "Started" field in the lead profile

- No Starts = those marked as "No Start" status for the date range selected.

- The data can be viewed as “Chart View” or “Table View”

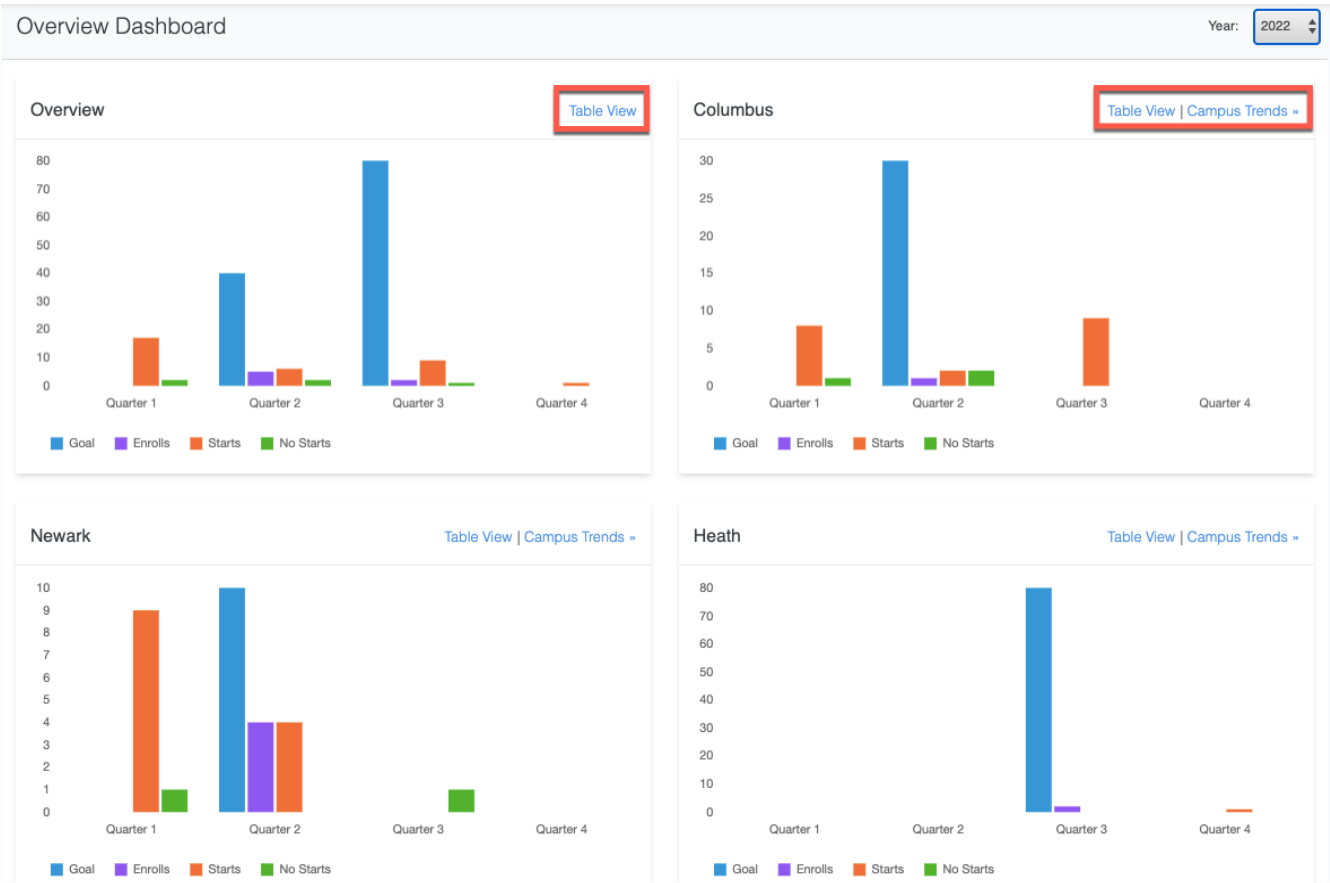

Fig.1.1.A: Overview Dashboard in “Chart View”. To change to “Table View” select the highlighted “Table View” link. You can further explore the data by campus by clicking the “Campus Trends” link.

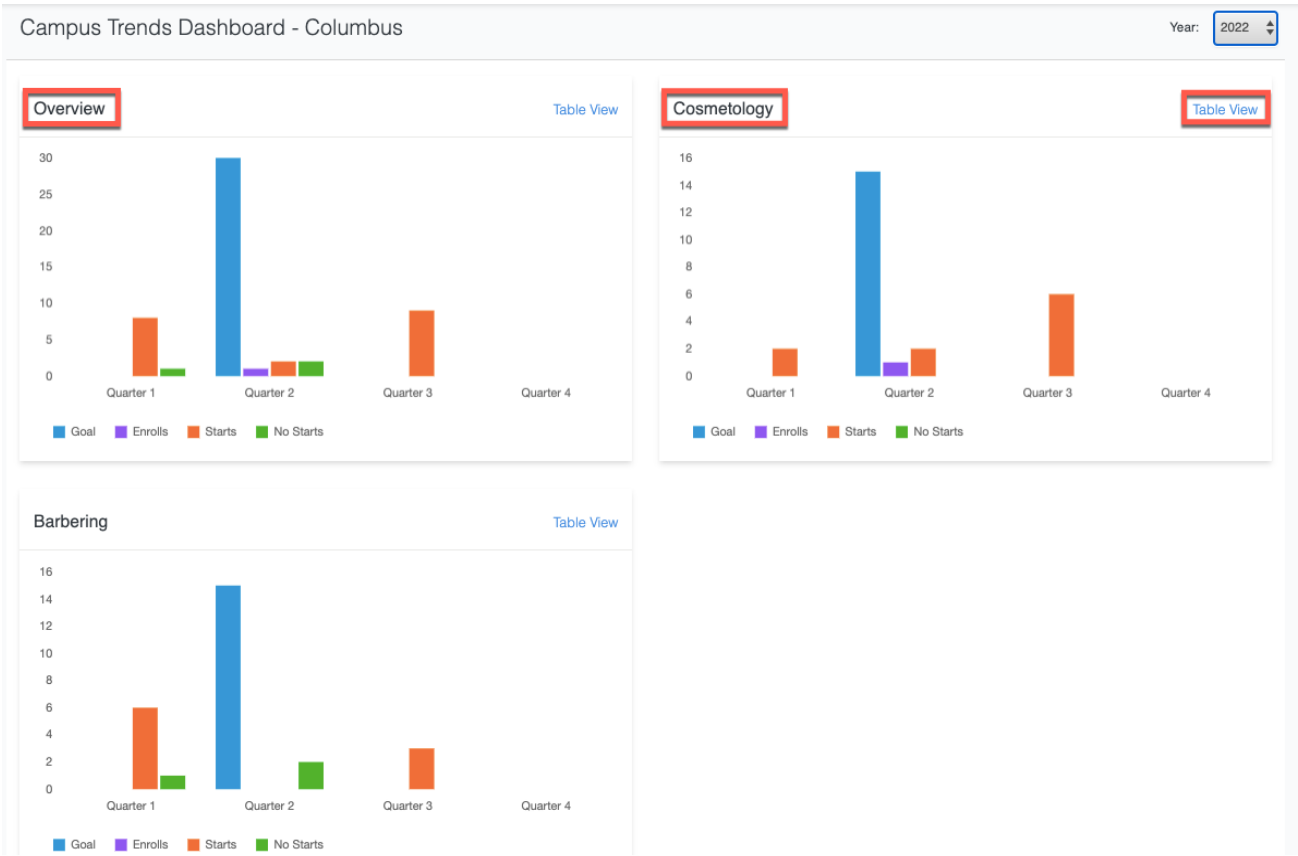

Fig.1.1.B: Campus Trends Dashboard for Columbus shows the trend for all programs in this campus for a year, filtered by each quarter. You can also view this data in the "Table View" by clicking the highlighted top-right link.

Cosmetology — Chart View

	Goal	Enrolled	Start	No Start
Quarter 1	0	0	2	0
Quarter 2	15	1	2	0
Quarter 3	0	0	6	0
Quarter 4	0	0	0	0

Fig.1.1.C: Campus and program specific data viewed in Table View.

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Lead Trends

Lead Trends by overall organization as well as each campus
Data is refreshed every 15 minutes

Leads = Unique leads in (unique leads report) by those that have been contacted (completing the "Initial Contact Made" in the lead profile)
If you are not using The 'Initial Contact Made**' field then there will not be any results found to display.**

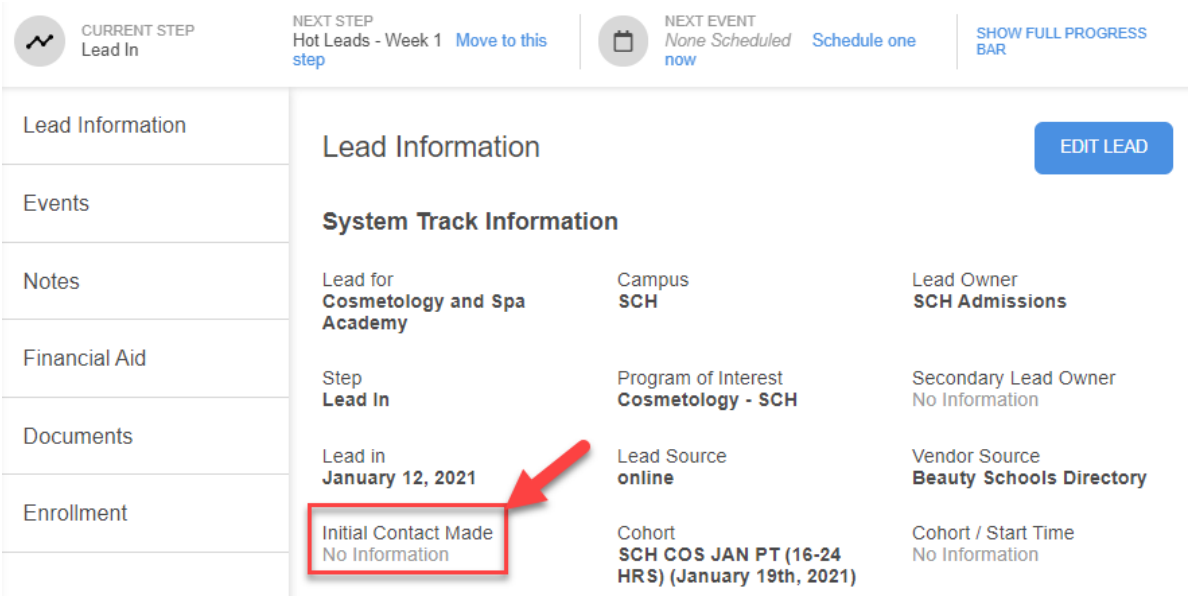


Fig.1.2.A: Use the "Initial Contact Made" field to make sure you create unique leads required for accurate reporting.

Lead Trends Dashboard - shows users **ALL** activity that happens within the selected date range. This is regardless of the Lead-in date. Even if a lead came into EDlumina before the selected date range, so long as there was an action taken with the lead [as defined within the lead trends' parameters], the activity will be counted within the Lead Trends Report.

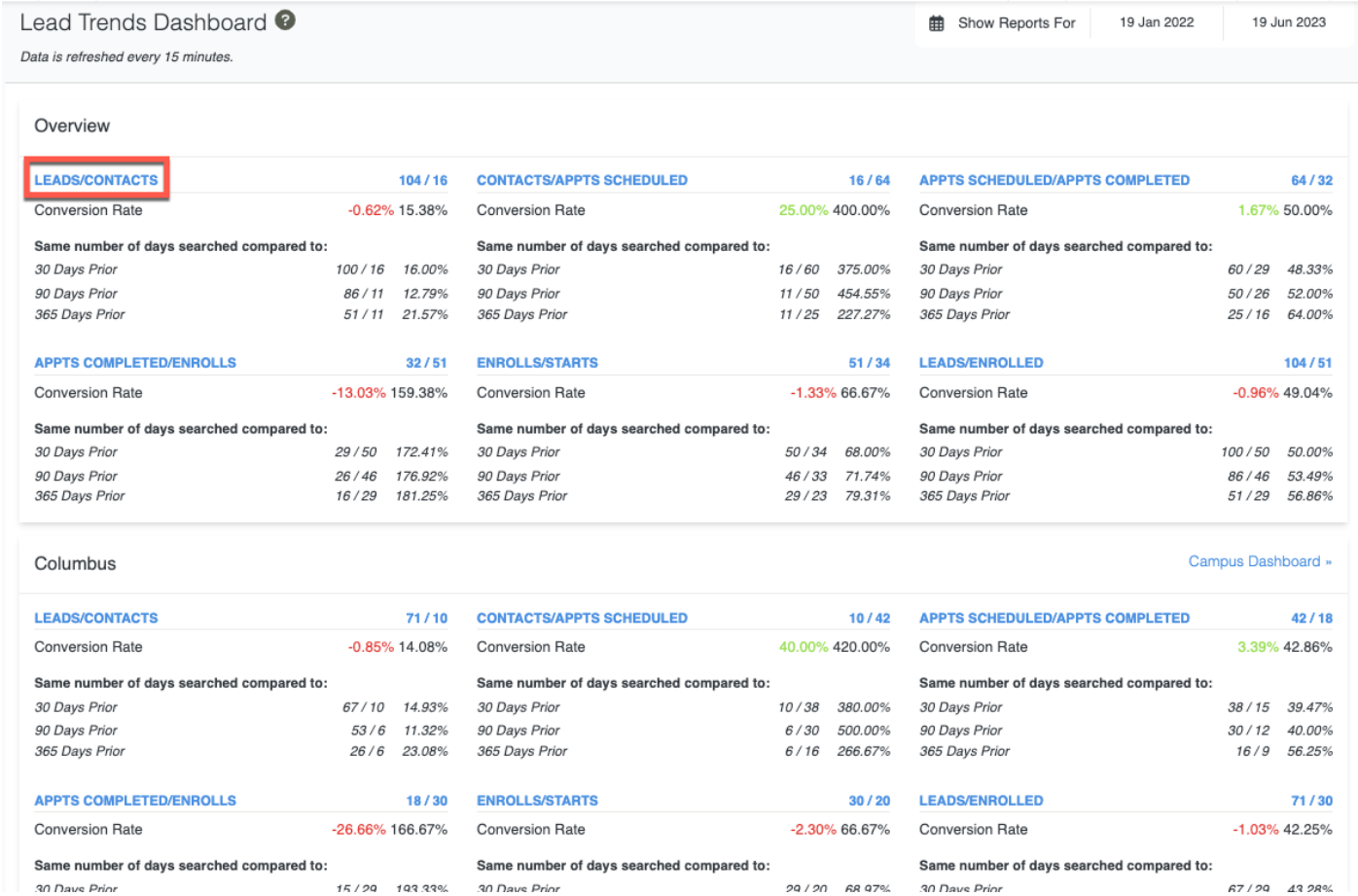
Users can dig deeper into the lead trends dashboard numbers. You can click on any of the blue headers [example - "Leads/Contacts"]. This will open up a pop up that will help you drill deeper into the conversion rates.

Step 1:
The first popup will have the following:

- Names of each of the reps who are responsible for that conversion.
- The respective % that contributes toward that conversion rate. For example, if Rep 1 has made 5 conversions of the total of 10, his/her share will be 50% towards the conversion rate.

Step 2:
Click on each User name to expand and see their contributions:

- Users can click on the names of any reps to dropdown the leads who have been converted.
- Users can also export the data pulled from the lead dropdown in the bottom left corner



Lead Trends Dashboard

Show Reports For 19 Jan 2022 19 Jun 2023

Data is refreshed every 15 minutes.

Overview

LEADS/CONTACTS	104 / 16	
Conversion Rate	-0.62%	15.38%
Same number of days searched compared to:		
30 Days Prior	*100 / 16*	*16.00%*
90 Days Prior	*86 / 11*	*12.79%*
365 Days Prior	*51 / 11*	*21.57%*

CONTACTS/APPTS SCHEDULED	16 / 64	
Conversion Rate	25.00%	400.00%
Same number of days searched compared to:		
30 Days Prior	*16 / 60*	*375.00%*
90 Days Prior	*11 / 50*	*454.55%*
365 Days Prior	*11 / 25*	*227.27%*

APPTS SCHEDULED/APPTS COMPLETED	64 / 32	
Conversion Rate	1.67%	50.00%
Same number of days searched compared to:		
30 Days Prior	*60 / 29*	*48.33%*
90 Days Prior	*50 / 26*	*52.00%*
365 Days Prior	*25 / 16*	*64.00%*

APPTS COMPLETED/ENROLLS	32 / 51	
Conversion Rate	-13.03%	159.38%
Same number of days searched compared to:		
30 Days Prior	*29 / 50*	*172.41%*
90 Days Prior	*26 / 46*	*176.92%*
365 Days Prior	*16 / 29*	*181.25%*

ENROLLS/STARTS	51 / 34	
Conversion Rate	-1.33%	66.67%
Same number of days searched compared to:		
30 Days Prior	*50 / 34*	*68.00%*
90 Days Prior	*46 / 33*	*71.74%*
365 Days Prior	*29 / 23*	*79.31%*

LEADS/ENROLLED	104 / 51	
Conversion Rate	-0.96%	49.04%
Same number of days searched compared to:		
30 Days Prior	*100 / 50*	*50.00%*
90 Days Prior	*86 / 46*	*53.49%*
365 Days Prior	*51 / 29*	*56.86%*

Columbus

Campus Dashboard »

LEADS/CONTACTS	71 / 10	
Conversion Rate	-0.85%	14.08%
Same number of days searched compared to:		
30 Days Prior	*67 / 10*	*14.93%*
90 Days Prior	*53 / 6*	*11.32%*
365 Days Prior	*26 / 6*	*23.08%*

CONTACTS/APPTS SCHEDULED	10 / 42	
Conversion Rate	40.00%	420.00%
Same number of days searched compared to:		
30 Days Prior	*10 / 38*	*380.00%*
90 Days Prior	*6 / 30*	*500.00%*
365 Days Prior	*6 / 16*	*266.67%*

APPTS SCHEDULED/APPTS COMPLETED	42 / 18	
Conversion Rate	3.39%	42.86%
Same number of days searched compared to:		
30 Days Prior	*38 / 15*	*39.47%*
90 Days Prior	*30 / 12*	*40.00%*
365 Days Prior	*16 / 9*	*56.25%*

APPTS COMPLETED/ENROLLS	18 / 30	
Conversion Rate	-26.66%	166.67%
Same number of days searched compared to:		
30 Days Prior	*15 / 29*	*193.33%*

ENROLLS/STARTS	30 / 20	
Conversion Rate	-2.30%	66.67%
Same number of days searched compared to:		
30 Days Prior	*29 / 20*	*68.97%*

LEADS/ENROLLED	71 / 30	
Conversion Rate	-1.03%	42.25%
Same number of days searched compared to:		
30 Days Prior	*67 / 29*	*43.28%*

Fig.1.2.B: Lead Trends Dashboard provides a comprehensive view of all activities and can be filtered by Campuses as well. The user can click on any of the blue headers [highlighted example - "Leads/Contacts"] to export the report.

Terminology:

- **Contacts/Appts Scheduled** = Those that have been contacted (completing the "Initial Contact Made") by Leads that have had an *appointment* type of event scheduled (FA appointments are not included in this number)
- **Appts Scheduled/Appts Completed** = Leads that have had an appointment scheduled / by those that have completed an Appointment (Numbers here are pulled from the Events Report)
- **Appts Completed / Enrolled** = those that have a completed appointment (Numbers to be pulled from Events Report) by those that were *marked as Enrolled.* (Not moved to an enrolled step)
- **Enrolled / Start** = Marked as enrolled / Those marked as a "Started" (New Feature above)

- Finally, the "**Same number of Days Searched Compared to**:" will give numbers to compare the existing date range with 30, 90, or 365 prior for the same number of days searched.

- By selecting "**Campus Dashboard**" users can drill down by program for the same statistics

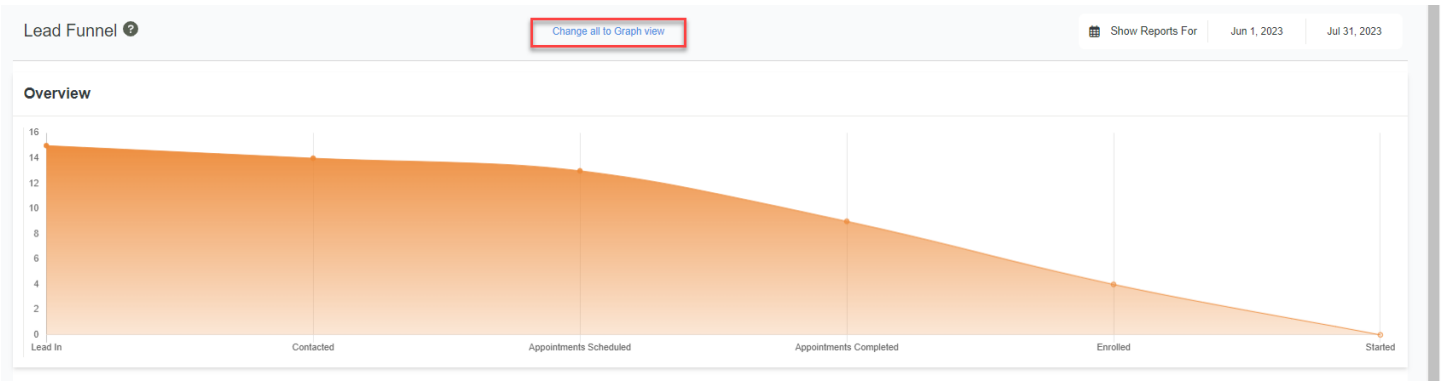
Lead Funnel

Lead Funnel shows users all activity that happens within the selected date range, for only the leads that came into EDlumina within that selected date range. If a lead came in to EDlumina before the selected date range, even if there was an action taken with the lead [as defined within the lead funnel parameters], the activity will **NOT** be counted within the Lead Funnel.

Although the concept is extremely similar, the overall calculation mechanism is in contrast to the philosophy used in the lead trends dashboard.

- **View Options:** This report can be viewed in Funnel View/Graph View.

- This reporting data can be further filtered to be campus-specific as well as program-specific.



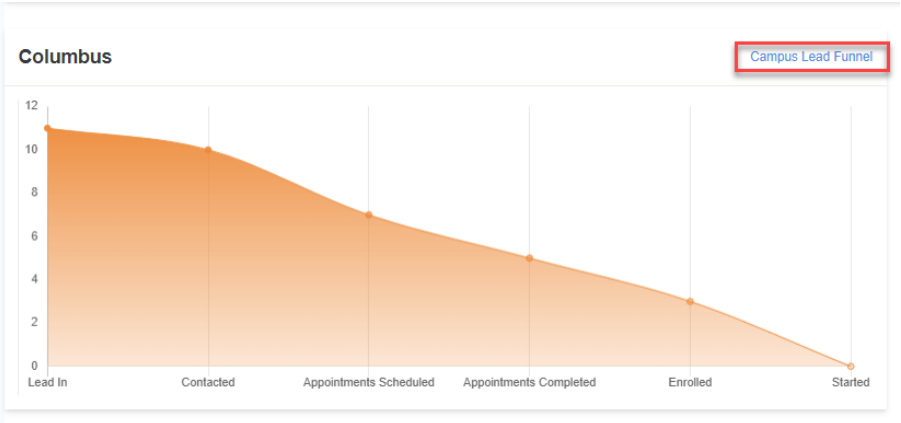


Fig.1.3.A: The Lead Funnel can be explored in Funnel View (above) or in Graph View (highlighted). The information can be further filtered by campus.

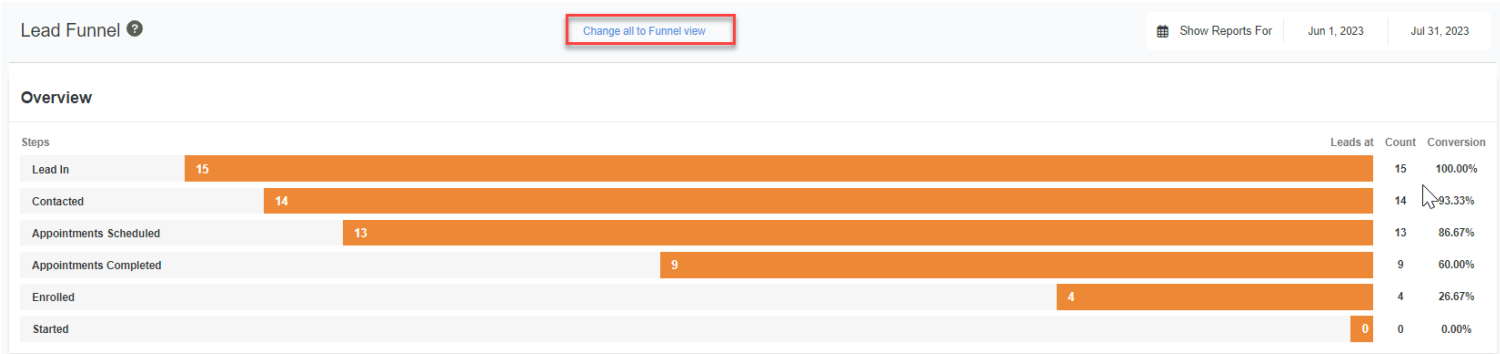


Fig.1.3.B: Lead Funnel in Graph View. Users can navigate this data on campus level by clicking the highlighted link.

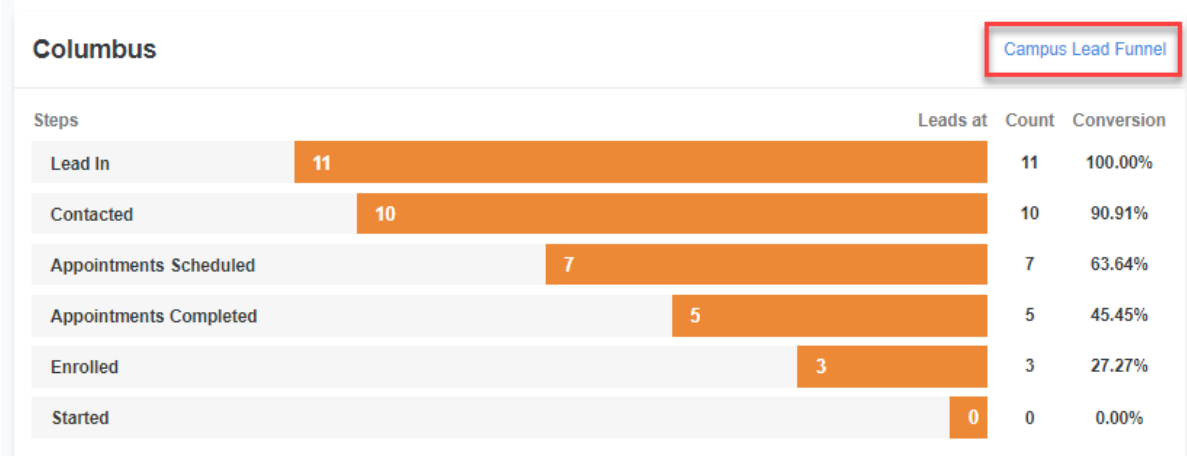


Fig.1.3.C: Lead Funnel data shown campus-specific, and further filtered by programs. Users can view this in Graph View by clicking on the highlighted link.

Manage Automated Reports

This is a useful feature that allows users to schedule-send automated reports. The reports are shared as a .csv file. All reports can be shared as a downloadable .csv file through this feature (even the reports that do not have the Download button feature on the top-right corner of their dashboards.

Users can specify:

- Which report to be sent
- At what frequency (Daily, Weekly, Monthly, Quarterly, Yearly) - note: the data in the report will be of the same time frame as the frequency and is **not cumulative**.
- At what time they'd like it to be sent
- Recipients of the report
- And, any details/message required to be sent with the report.

Fig.2.A: Manage Automated Report can be accessed by clicking on the highlighted link on the top-right corner of the Reporting Dashboard.

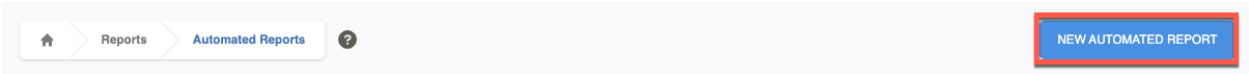


Fig.2.B: A new automated report will be generated by following the "New Automated Report" tab in the following page.

Status Reports

No Vendor Source By Campus

Show the leads that no vendor has been assigned to through a filtered date range (90 days is default) by Campus and Rep name, with totals by Campus.

- You may also click to view the leads directly.
- Click on the blue download button to download a .csv file (excel file) of the data.

The leads that do not have a vendor source are organized by Campus. They are also organized by which representative they have.

- The leads can be further organized by selecting the beginning and ending "**Lead In**" date shown in the top right hand corner of the screenshot.
- Click **View Leads**, shown on the right hand side of the screenshot in order to show all the leads with no vendor source for a representative.

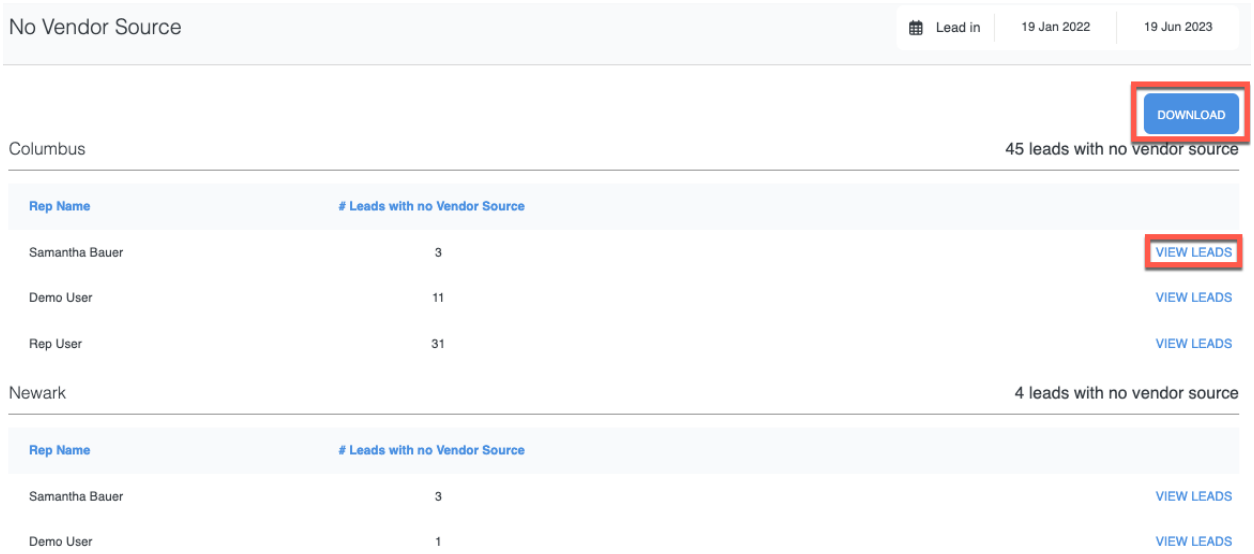
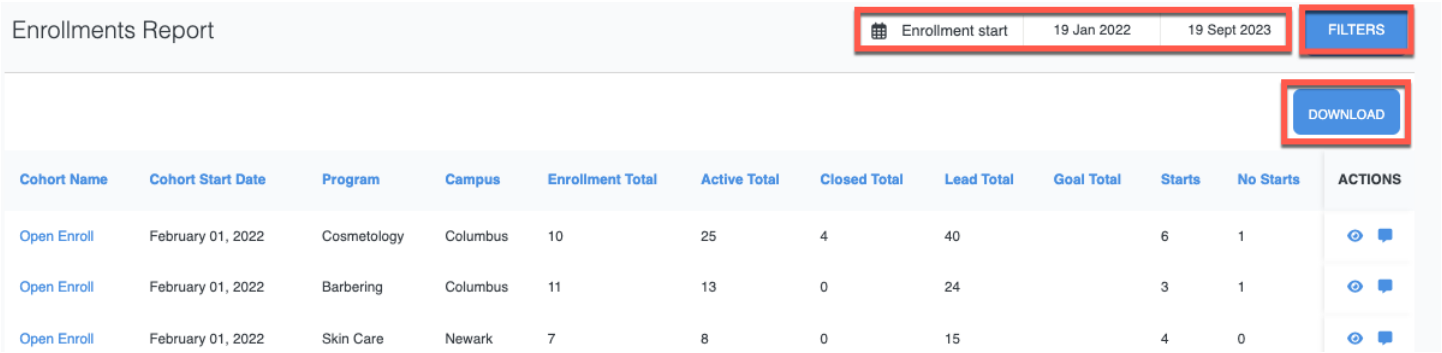


Fig.2.1.A: No Vendor Source shows the leads with no vendor by Campus and Rep name. You can Download a .csv file by clicking the highlighted top-right Download tab. You can inspect and edit leads by clicking the highlighted "VIEW LEADS" link on the right.

Enrollment Report

Enrollment report allows users to pull student data based on the criteria for the enrollment start dates that were selected.Once you are on the **Enrollments Report** page, choose both a start date and end date for the enrollment (this allows for all the students that will be enrolling into cohorts within that time period to populate the fields).



Cohort Name	Cohort Start Date	Program	Campus	Enrollment Total	Active Total	Closed Total	Lead Total	Goal Total	Starts	No Starts	ACTIONS
Open Enroll	February 01, 2022	Cosmetology	Columbus	10	25	4	40		6	1	
Open Enroll	February 01, 2022	Barbering	Columbus	11	13	0	24		3	1	
Open Enroll	February 01, 2022	Skin Care	Newark	7	8	0	15		4	0	

Fig.2.2.A: Enrollment Report can be populated by students enrolled in the chosen timeframe (select the start and end dates). The report can be downloaded as a .csv file by clicking on the highlighted "Download" button. The "FILTERS" button will further narrow down the results.

- Enrollment Report can be further specified by selecting the "FILTERS" button in the top right hand corner of the screen.
- The leads can be sorted by:
    - Program
    - Campus
    - Class Start Date

  Press the search button to get the results of the narrowed down search.

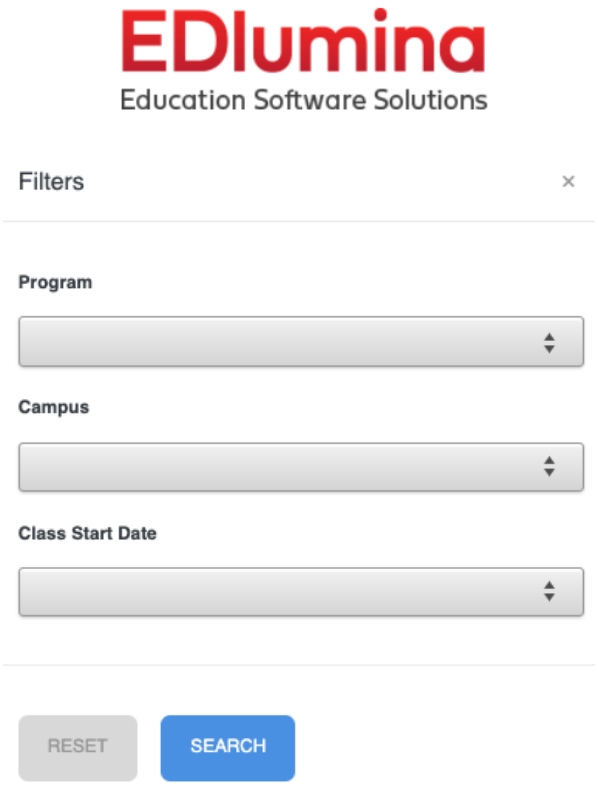


Fig.2.2.B: Enrollment Report can be further specified.

Pipeline Report

Shows the leads that have been marked as “warm” or “hot,” their expected tuition amount, and their representative.

- They can be sorted by their lead-in date.
- Once on the Pipeline Report page, select the Start Date and End Date in the top right hand corner of the screen. The results displayed will be within the start and end dates.
- The results of the Enrollment Report can be further narrowed down by selecting the FILTERS button in the top right hand corner of the screen.
    - The leads can be sorted by Campus and Program. Press the search button to get the results of the narrowed down search.

This report only tracks active, non-enrolled leads.

Fig.2.3.A: The Pipeline Report provides a comprehensive data description of the “warm” and “hot” leads.

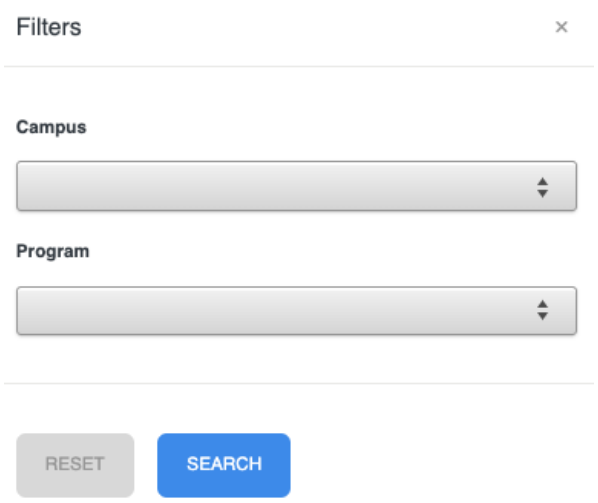


Fig. 2.3.B: The Pipeline Report can be further filtered Campus and Program by clicking the “FILTER” button on the top-right corner of the Pipeline Report Dashboard.

Productivity Report

Shows information based on the selected date range. The data is sorted by individual campuses. Information provided includes: Appointments Set, Planned Interviews, No Shows, Actual Enrollments, Notes Added, Leads In

- You can change the **sorting of the dates** by selecting the drop down in the top right corner.
- You can click on the **View Representative Details** button for each of the campuses to get a breakdown of how the leads are distributed among the representatives.
- You can **filter** the results of the report by the dates. Some of the default selections you can choose are: current month, current week, current day, or previous day, however you can enter a custom date range as well.
- Use the **Download** button to download the data to a .csv (comma separated value) file, which is an excel file.

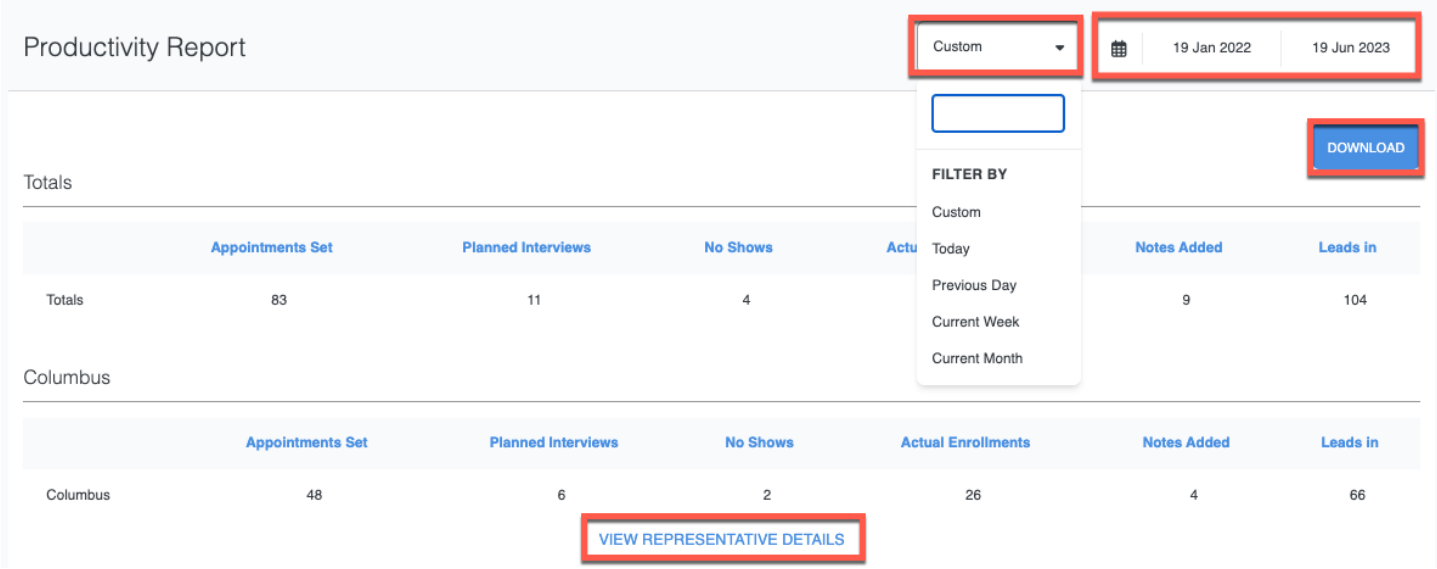


Fig. 2.4.A: The Productivity Report is sorted by Campuses. The "Download" button allows you to download a .csv file. You can filter the results by the dates through the highlighted dropdown option. The "View Representative Details" allows you to get a breakdown of how the leads are distributed among Reps.

Pipeline Analytics Report

Shows workflow data focusing on the completion of a pipeline.
The Pipeline Analytics Report can be viewed by the following filters:

1. By Program
2. By Step
3. By Campus
4. By Rep

Pipeline Analytics By Program: analyzes programs by campus, active leads, closed leads, enrolled leads, steps in pipeline and average time taken to complete the pipeline. This helps users identify how programs in each campus are performing in terms of enrollment rates, etc.

Pipeline Analytics by Program — Lead In Date: Jan 1, 2023 – Aug 8, 2023

NAME	CAMPUS	ACTIVE LEADS	CLOSED LEADS	ENROLLED LEADS	STEPS IN PIPELINE	AVERAGE PIPELINE COMPLETION TIME
Skin Care	Newark	5	0	2	5	16 days, 13 hours, 40 minutes and 14 seconds
Paramedic	Heath	1	0	1	5	4 days, 1 hours, 10 minutes and 26 seconds
Cosmetology	Columbus	23	4	5	6	50 days, 3 hours, 57 minutes and 42 seconds
Barbering	Columbus	6	0	5	3	9 days, 14 hours, 1 minutes and 34 seconds

Fig. 2.5.A: Pipeline Analytics By Program

Pipeline Analytics By Step: analyzes the 8 steps (from Contacted to Re-Enrolled) by showing how many students are in active leads, closed leads, enrolled leads and the average time on the step. This helps users identify which steps take the most time, how many students move from active leads to enrolled, etc.

Pipeline Analytics by Program » Skin Care » Steps — Lead In Date: Jan 1, 2023 – Aug 8, 2023

NAME	ACTIVE LEADS	CLOSED LEADS	ENROLLED LEADS	AVERAGE TIME ON STEP
New Lead	4	1	2	22 days, 4 hours, 10 minutes and 54 seconds
Contacted	5	0	1	26 days, 17 hours, 29 minutes and 28 seconds
Appointment	12	3	1	24 days, 22 hours, 43 minutes and 0 seconds
Financing	5	0	1	8 days, 10 hours, 19 minutes and 4 seconds
Enrolled	2	0	7	0 days, 0 hours, 0 minutes and 3 seconds

Fig. 2.5.B: Pipeline Analytics By Step

Pipeline Analytics By Campus: analyzes how each campus of the school is doing in terms of enrollment rates. This report shows how many students, in each campus, are active leads, closed leads, enrolled leads, and what is the average pipeline completion time.

Pipeline Analytics by Campus — Lead In Date: Jan 1, 2023 – Aug 8, 2023

CAMPUS NAME	ACTIVE LEADS	CLOSED LEADS	ENROLLED LEADS	AVERAGE PIPELINE COMPLETION TIME
Columbus	29	4	10	29 days, 20 hours, 59 minutes and 38 seconds
Newark	5	0	2	16 days, 13 hours, 40 minutes and 14 seconds
Heath	4	0	1	1 days, 0 hours, 17 minutes and 36 seconds

Fig. 2.5.C: Pipeline Analytics By Campus

Pipeline Analytics By Reps: shows how many students are active leads, closed leads, enrolled leads, and what is the average pipeline completion time under each Rep.

Pipeline Analytics by Rep | Lead In Date | Jan 1, 2023 | Aug 8, 2023

NAME	ACTIVE LEADS	CLOSED LEADS	ENROLLED LEADS	AVERAGE COMPLETION TIME
Samantha Bauer	16	4	7	11 days, 9 hours, 59 minutes and 57 seconds
Rep User	21	0	4	54 days, 20 hours, 8 minutes and 12 seconds
Demo User	1	0	2	6 days, 6 hours, 46 minutes and 6 seconds

Fig. 2.5.D: Pipeline Analytics By Reps

Events Report

This report shows events scheduling data focusing on lead no show behavior. It pulls information regarding scheduled (pending), completed and no show Appointment and Interview type events.

- **Pending** is the number of events scheduled during the timeframe with no closure/outcome.
- **Completed** are events that took place as scheduled and were closed.
- **Appointments/Interviews** shows the number of Appointment and Interview type events that were scheduled.
    - **Reschedule Prior** is the number of events that were marked as a "Reschedule" prior to the event taking place.
    - **Canceled Prior** is the number of events that were marked as "Canceled" prior to the event taking place.
    - **No Shows** are events marked as No Show
    - **Reschedule After** are marked as a Reschedule after the event was past and marked as a "No Show".
    - **Canceled After** are marked as Canceled after the event was past and marked as a "No Show".

Derivation of the No Show Percentage using an Example:
#**Successfully Completed** = #Completed - #Event Outcomes
#**Event Outcomes** = Rescheduled Prior + Canceled Prior + No Show + Rescheduled After + Canceled After

- This is the part of the Completed numbers. The remainder of this Completed number can be derived when it is completed Successfully!

#**Total No Shows** = No Show + Rescheduled After + Canceled After
#**Total Events Scheduled** = Appointments + Interviews

- Rescheduled & Cancel Prior are counted towards Completed (Appointment & Interviews)

Percentage No Show = $Total\ No\ Show / Total\ Events\ Scheduled$

Dec 31, 2020
Campus: CL & SCH
From the picture below:

CL:
#Completed = 37
#Event Outcomes = 27 (=3+18+3+0+3)
#Successfully completed = 10 (=37-27)

#Total No Shows = 6 (=3+0+3)
#Total Events Scheduled =66 (= 36 +30)

Therefore,
% No Show = 9.09% (= 6/66)

SCH:
#Completed = 41
#Event Outcomes = 40 (=4+11+8+2+15)
#Successfully completed = 1 (41-40)

#Total No Shows = 25 (=8+2+15)
#Total Events Scheduled = 86 (= 31+55)

% No Show = 29.07% (= 25/86)

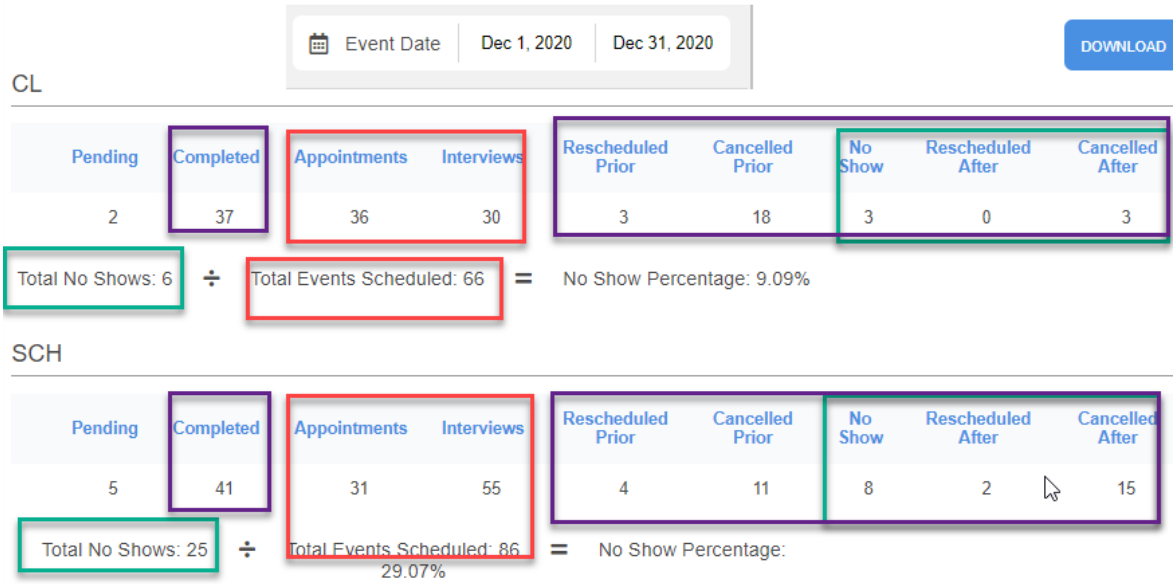


Fig. 2.6.A: Events Report deconstructed to demonstrate how the #Successfully Completed is calculated for each campus. You can also download this report by clicking on the Download button on the top-right corner. The No Show% = Total No Shows/Total Events

First Contacted Report

Shows leads data focusing on the academic outcome of the lead.
If you are not using the following "Initial Contact Made" field then there will not be any results found to display.

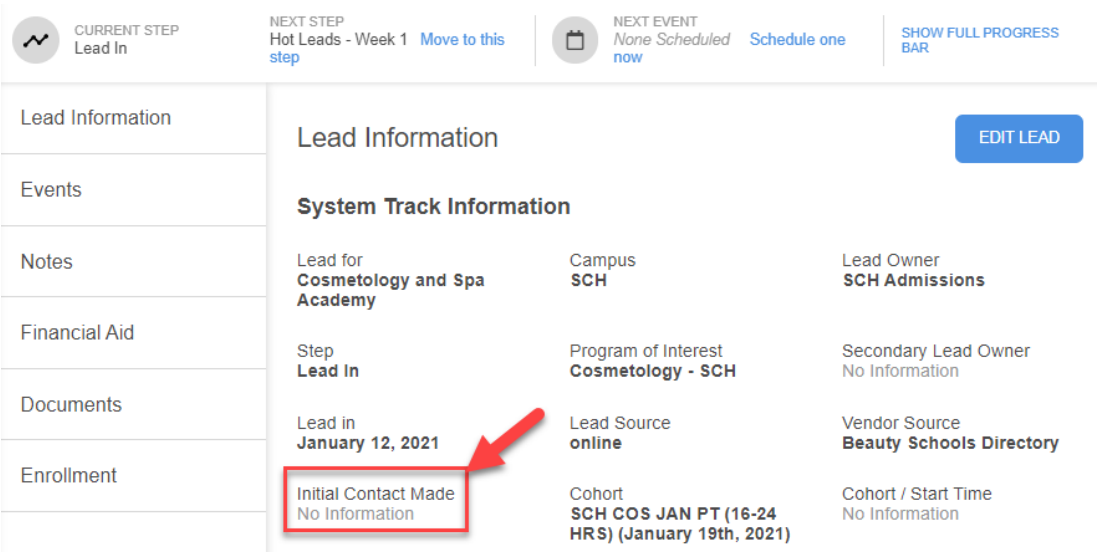


Fig.2.7.A: Use the "Initial Contact Made" field to make sure you create unique leads required for accurate reporting.

- Lists the Campus, the Lead Owner, First Name, Last Name, Cohort, Source, Vendor Source, Lead In Date and the First Contacted Date. It also allows you to View under Actions and view/edit Lead Activity
- Data can be filtered to be within the dates by using the options in the top right, shown below.
- This report can also be downloaded as a .csv file by clicking the Download button on the top-right corner.

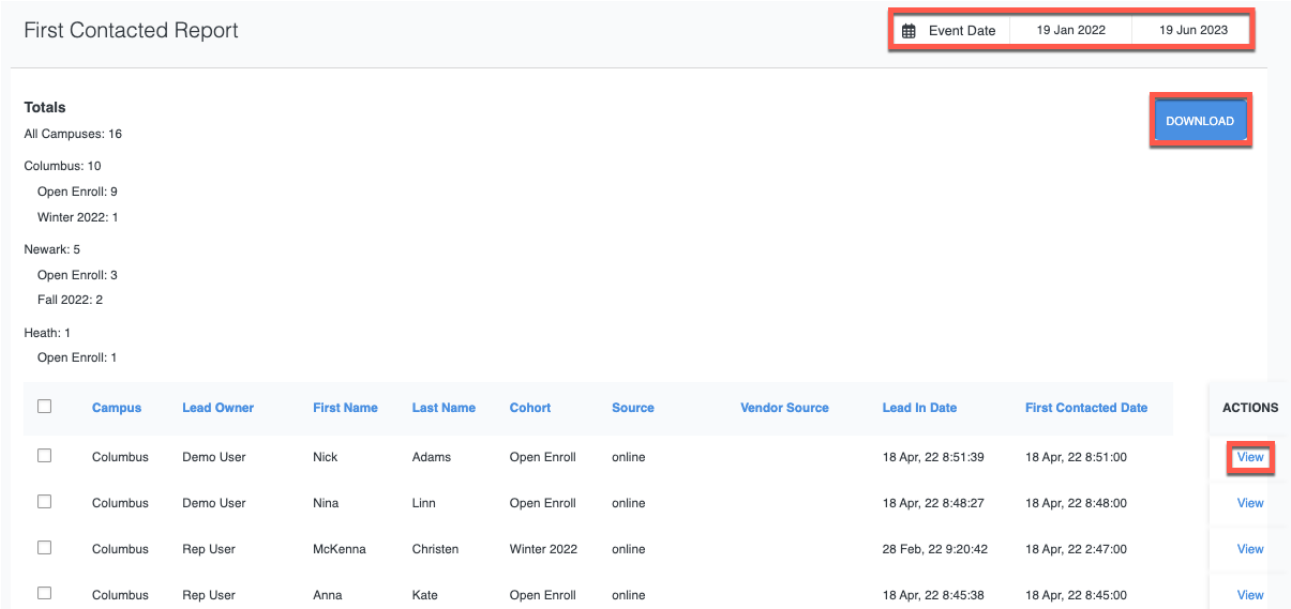


Fig.2.7.B: Users can filter dates on the First Contacted Report, download the .csv file and view/edit Lead Activity by following the respective highlighted links and buttons.

Unique Lead In Report

Shows a total count of new unique leads for a specific timeframe (default is 30 days from today) by campus, program and cohort with the Open, Enrolled or Closed statuses, excluding any duplicates

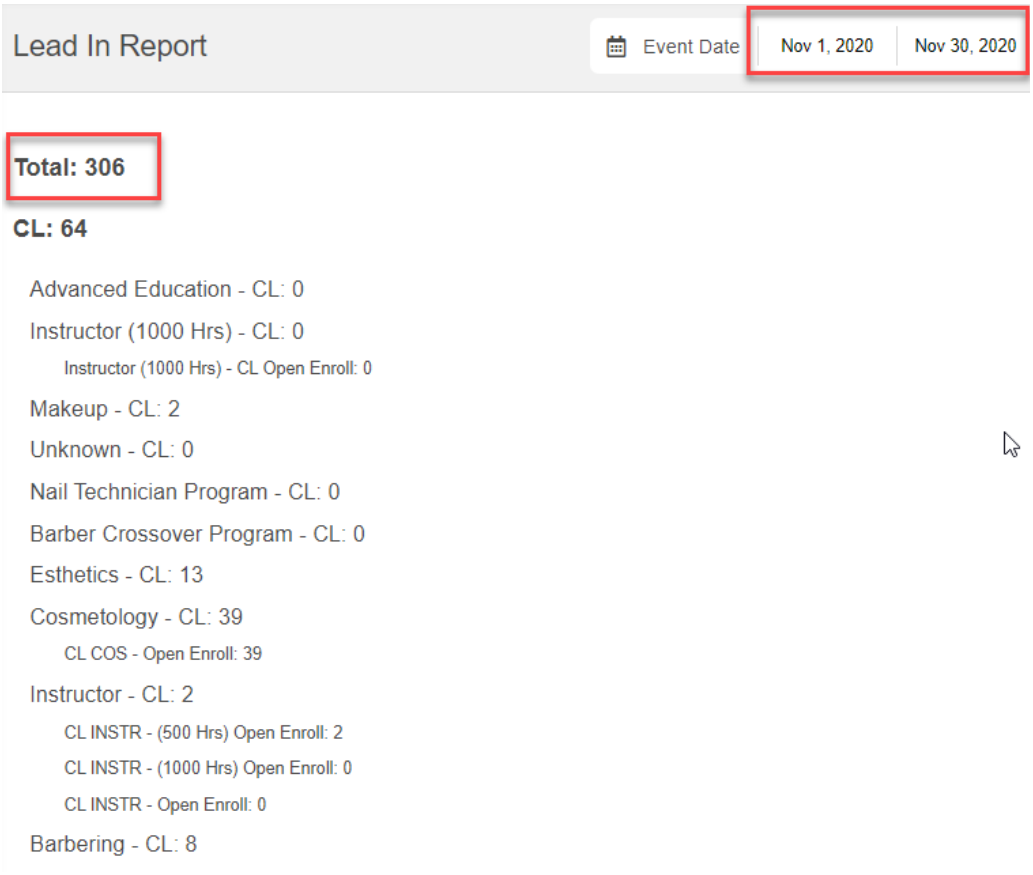


Fig.2.8.A: Unique Lead In Report time frame can be altered by changing dates in the highlighted dropdowns on the top-right corner. The "Total" shows the total number of unique leads for the specific time period by campus, program and cohort with the Open, Enrolled or Closed statuses, excluding any duplicates.

Lead To Enroll By Campus Report

Shows the average time between a lead coming in and getting marked enrolled, broken down by campus.
The report includes:

- # of active reps on each campus
- Total # of enrollments for each campus
- Date when the last enrollment was marked for each campus
- Average days between Lean-in and Enrollment for all leads, per campus.

Additionally, users can also wrangle the data in the columns for the reporting table. This can be done by clicking on the reorder arrows on the name of each individual column.

For any Campus that either has no enrollments marked, or has no associated data points, the table cells will have an N.A. noted within it.

Lead to Enroll Time By Campus Report

NAME	ACTIVE REPS	TOTAL ENROLLMENTS	DATE OF LAST ENROLLMENT	AVERAGE LEAD TO ENROLL DAYS
Columbus	3	30	06/13/2023	56.2
Newark	2	19	03/15/2023	17.37
Heath	2	2	03/13/2023	160

Fig.2.9.A: Lead To Enroll By Campus Report shows the average time between a lead coming in and getting marked enrolled, broken down by campus.

Outcomes Report

Shows lead data focusing on the academic outcome of the lead

- by providing a list of your leads as well as their academic outcomes from their lead profiles.

This data of outcomes are taken from the manual inputs that are entered on individual lead profiles
Users can also click on individual rows to directly go to specific lead profiles in case any edits need to be made
To wrangle the data, users can also select specific date ranges and reorder columns alphabetically as needed

Academic Outcomes Report

Lead In Date 26 Jan 2022 End Date

Only show leads with academic outcomes

NAME	EMAIL	PHONE NUMBER	PROGRAM	CAMPUS	ACADEMIC OUTCOME
Molly Jones	mjones@demo.com		Skin Care	Newark	Active
Billy Odaysia	billy@testing.com	(568) 990-3212	Barbering	Columbus	Financial_termination
Julie Long	jlong@msn.com	(678) 333-2211	Cosmetology	Columbus	Graduated

Fig.2.10.A: The time frame on the Outcomes Report can be changed by changing the highlighted start and end date. You can choose to only view the leads with academic outcomes by clicking on the pointed checkbox.

Lead Demographic Reports

Demographics Report

Provides demographic information relevant to each lead and can be filtered by Program and Campus.

- It includes the lead's main information along with gender, country, ethnicity, DOB and marital status. This report excludes closed and enrolled leads.
- The leads can be sorted by their Lead In date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.
- The results of the Demographics Report can be further narrowed down by selecting the FILTERS button in the top right hand corner of the screen.
    - The leads can be sorted by Campus and Program. Press the search button to get the results of the narrowed down search.

Demographic Report

Lead in 19 Jan 2022 19 Jun 2023 FILTERS

DOWNLOAD

Name	Rep	Program	Campus	Status in workflow	Email	Enrollment Date	Gender	Country	Ethnicity	DOB	Marital Status	ACTIONS
Jen Marks	Samantha Bauer	Cosmetology	Columbus	draft	jmarks@demo.com	31 Jan, 2022						
Johnny Appleseed	Demo User	Barbering	Columbus	draft	johnjohn@yahoo.com	31 Jan, 2022						
Tony Tapedeck	Demo User	Barbering	Columbus	draft	scott@scholarhousemedia.com	31 Jan, 2022						
Nick Adams	Demo User	Barbering	Columbus	draft	adams.nick@demo.com	31 Jan, 2022						
Billy Odaysia	Samantha Bauer	Barbering	Columbus	draft	billy@testing.com	31 Jan, 2022						

Fig.3.1.A: The time frame on the Demographic Report can be changed by changing the highlighted start and end date. The Download button on the top-right corner allows you to generate a .csv file. The FILTER button allows you to specify leads by program and campus. The Actions column gives you the option to message or view/edit Lead Activity.

High School Details Report

This report pulls the intended start date for a lead in addition to the high school they attend and can be filtered by the Program and Campus. This report shows only active and enrolled leads.

- Along with the general lead information, this report includes High School, Address, Planned Enrollment Start Date and Vendor Source.
- The leads can be sorted by their Lead In date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.
- The results of the High School Details Report can be further narrowed down by selecting the FILTERS button in the top right hand corner of the screen.
    - The leads can be sorted by Campus and Program. Press the search button to get the results of the narrowed down search.

High School Details Report

Lead in 19 Jan 2022 19 Jun 2023 FILTERS

DOWNLOAD

☐	Name	Rep Name	Program	Campus	Status in workflow	Email	High School	Address	Planned Enrollment Start Date	Vendor Source	ACTIONS
☐	Kellie Link	Rep User	Cosmetology	Columbus	enrolled	samantha.bauer+lead@cyanna.com	Granville High School	30 Main Street Newark Ohio 43235	01 Feb, 22	Google Ad 3	
☐	Aaron Smith	Samantha Bauer	STNA	Heath	enrolled	samantha.bauer+student@cyanna.com	Thomas Worthington	1 Main St. Columbus Ohio 43215	01 Aug, 22	Kellie Link (Friend)	
☐	Kelly Jones	Rep User	Cosmetology	Columbus	enrolled	kj123@demo.com	James Harding High School	1122 Main St. Columbus Oh 43235	01 Feb, 22		

Fig.3.2.A: The time frame on the High School Details Report can be changed by changing the highlighted start and end date. The Download button on the top-right corner allows you to generate a .csv file. The FILTER button allows you to specify leads by program and campus. The Actions column gives you the option to message or view/edit Lead Activity.

Highest Education Report

This report offers demographic data as well as the highest degree earned by a lead, and it can be sorted by Programs and Campuses. This will list the same data as the Demographics Report, but now the leads are organized by the highest degree that they earned.

- The leads can be sorted by their Lead In date by selecting the start date and end date in the top right corner of the screen. The results displayed will have a Lead In date within the given period.
- The results of the Highest Education Earned Report can be further narrowed down by selecting the FILTERS button in the top right hand corner of the screen.
    - The leads can be sorted by Campus and Program. Press the search button to get the results of the narrowed down search.

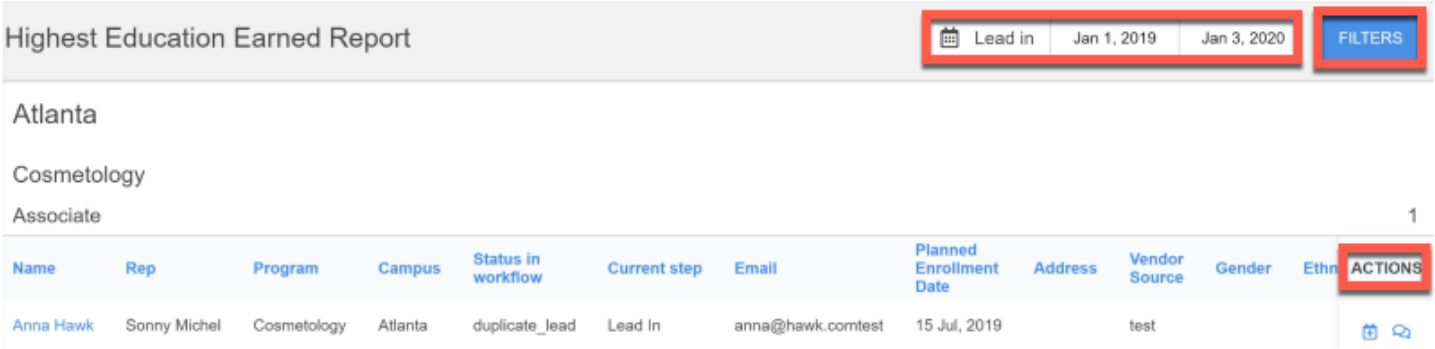


Fig.3.3.A: The time frame on the High School Details Report can be changed by changing the highlighted start and end date. The FILTER button allows you to specify leads by program and campus. The Actions column gives you the option to message or view/edit Lead Activity.

Efficacy & Actions Reports

Efficacy Report

This report pulls numbers and percentages for each step in a program workflow based on the set-up leads that came in during the pre-selected data range. This report can be viewed by the following filters:

1. By Vendor Source
2. By Program
3. By Rep
4. By Lead Source
5. By Campus

- The intent of this report is to track the efficacy of the various sources. This report will only pull the step actions for leads that came in during the date range selected. This is different from the Actions Report that will show all the actions taken on the workflow during the date range associated with all the leads regardless of when the lead came into the system. In short, one is based on the actions for the lead in date for leads (Efficacy) and the other is based on the actions taken during the date range (Actions).
- Each filter is separated by program/campus and pulls the previous three months of data based on the Lead In Date. This report will pull for all **Active and Enrolled Leads**.

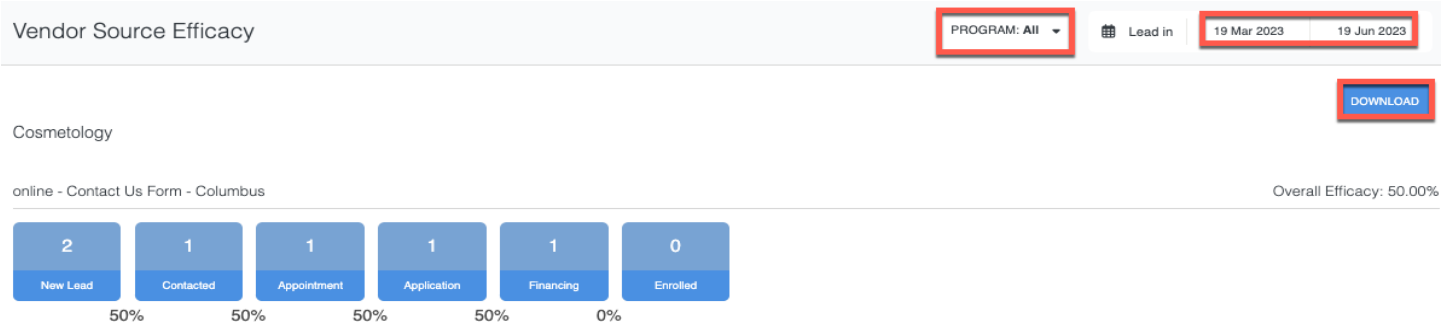


Fig.4.1.A: The time frame on the Efficacy By Vendor Source Report can be changed by changing the highlighted start and end date. The Download button on the top-right corner allows you to generate a .csv file. The PROGRAM dropdown allows you to specify data by program. The data is already filtered by campus.

Actions Report

This report pulls numbers and percentages based on actions taken by reps for each step in the workflow. The numbers and percentages shown are not reflective of the set of lead that came in for the date range, but rather the actions taken during that date range. Actions Report shows all the actions taken on the workflow during the date range associated with all the leads regardless of when the lead came into the system.This report can be viewed by the following filters:

1. By Vendor Source
2. By Program
3. By Rep
4. By Lead Source

This report will pull for all Active and Enrolled Leads.

- The data can be sorted by their Actions Range date by selecting the start date and end date in the top right corner of the screen. The results displayed will be within the given period.
- The results of the Actions Report can be further narrowed down by selecting the CAMPUS or PROGRAM button in the top right hand corner of the screen.

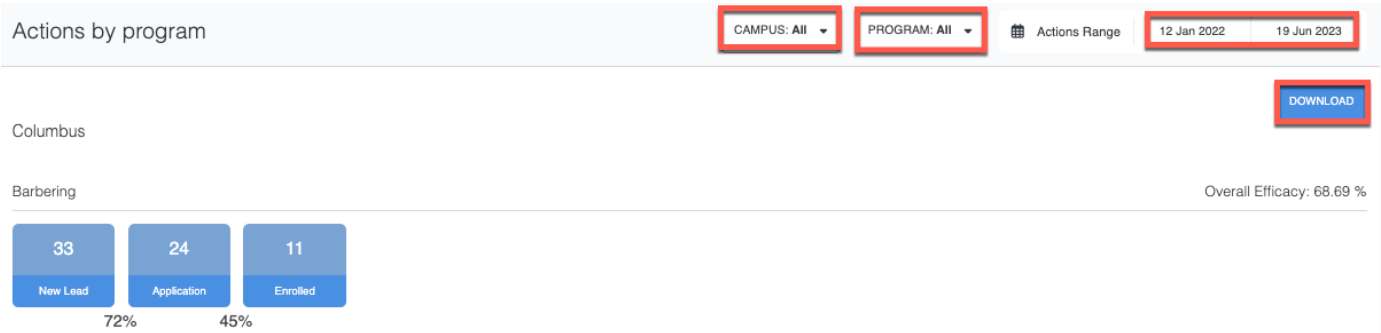


Fig.4.2.A: The time frame on the Actions By Program Report can be changed by changing the highlighted start and end date. The Download button on the top-right corner allows you to generate a .csv file. The CAMPUS and PROGRAM dropdown allows you to specify data by campus and program.

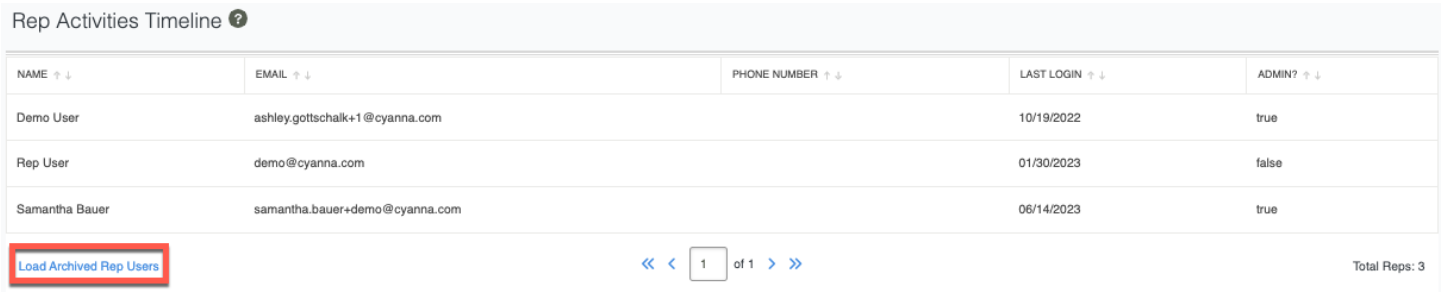
User Reports

Rep Activities Timeline

This report shows a timeline of activities performed by individual users over a period of time on Edlumina's CRM.

- In order to see the activity performed by the users of your organization, simply click on the names of any of the users. This will generate a fly out from the right side of your screen which will have timestamps and details as to what activity was performed by the selected user.
- You can also customize the date range between which you want to view user activity. In order to do so, simply manipulate the date range selection box on the fly out that is generated per user.

NOTE: *Since this report was launched by the Edlumina team on 4/19/2022, the timeline of activities that are recorded on the platform only goes back to 4/19/2022.*
If you want to see the activities timeline of the users who have been archived, please click on the "Load Archived Rep Users" button on the bottom of the table.


Rep Activities Timeline

NAME	EMAIL	PHONE NUMBER	LAST LOGIN	ADMIN?
Demo User	ashley.gottschalk+1@cyanna.com		10/19/2022	true
Rep User	demo@cyanna.com		01/30/2023	false
Samantha Bauer	samantha.bauer+demo@cyanna.com		06/14/2023	true

Load Archived Rep Users 1 of 1 Total Reps: 3

Fig.5.1.A: Rep Activities Timeline can be used to analyze the Rep usage patterns. To check activities time of the users who have been archived, click the highlighted "Load Archived Rep Users" link.

User Metrics Report

This report pulls specific metrics data (KPI) for each user that EDlumina tracks for the Users of your organization. You can see the following metrics recorded on EDlumina:

1. Leads Assigned
2. Leads Added
3. Messages Sent
4. Hot Leads Marked
5. Leads Closed
6. Steps Moved
7. Events Scheduled
8. Enrollments Marked

- You can also arrange the User rankings in ascending or descending order by clicking on the reordering arrows on the names of each column.
- In addition to that, you can also select the date range for when you want to see the user metrics to be reported. This can be done via the input boxes on the top right side of your screen.

- If you want to see the metrics of the users who have been archived, please click on the "Toggle Archived Rep Uses" button on the bottom of the table.

User Metrics Report

Activity Between 19 Jan 2022 19 Jun 2023

NAME	EMAIL	LEADS ASSIGNED	LEADS ADDED	MESSAGES SENT	HOT LEADS MARKED	LEADS CLOSED	STEPS MOVED	EVENTS SCHEDULED	ENROLLMENTS MARKED
Cyanna Admin	it@cyanna.com	13	13	6	4	0	61	6	0
Demo User	ashley.gottschalk+1@cyanna.com	33	15	92	16	0	55	86	10
Rep User	demo@cyanna.com	0	0	25	0	0	0	4	26
Samantha Bauer	samantha.bauer+demo@cyanna.com	45	43	266	30	0	138	108	8

Toggle Archived Rep Users

Fig.5.2.A: User Metrics Report can be used to analyze the KPIs. To check the metrics of the users who have been archived, click on the highlighted "Toggle Archived Rep Uses" button at the bottom of the table.

Lead to Enroll by User Report

This report shows the average number of days it takes each user to enroll their leads. For each user, the table intends to show the average # of days that have lapsed between when there was a "Lead-in" to when the user marked the lead as "Enrolled". The table has the following data points for each user:

1. Name of User
2. Email of User
3. Phone # of User
4. Campuses the User belongs to
5. Whether or not the User has admin access
6. Date of last log-in for the User
7. Average # of days between lead-in and enrollment per User, for all their leads

- Users can also wrangle the data in the columns for the reporting table. This can be done by clicking on the reorder arrows on the name of each individual column.
- For any User that either has no enrollments marked, or has no associated data points, the table cells will have an N.A. noted within it.

Lead to Enroll Time By User Report

NAME	EMAIL	PHONE	CAMPUSES	ADMIN	LAST LOGIN	AVERAGE LEAD TO ENROLL DAYS
Cyanna Admin	it@cyanna.com	None	None	True	06/19/2023	N/A
Demo User	ashley.gottschalk+1@cyanna.com	None	Columbus, Newark, Heath	True	10/19/2022	6.2
Rep User	demo@cyanna.com	None	Columbus	False	01/30/2023	38.17
Samantha Bauer	samantha.bauer+demo@cyanna.com	None	Columbus, Newark, Heath	True	06/14/2023	66.63

Toggle Archived Rep Users

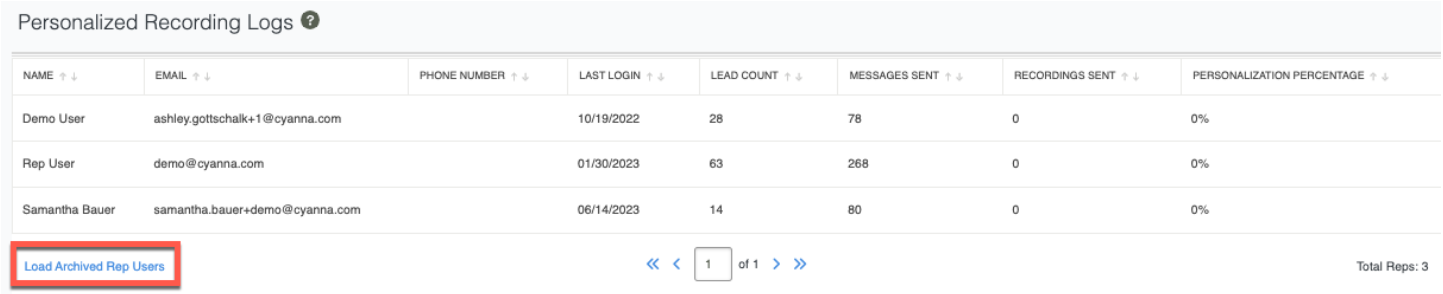
Fig.5.3.A: To check the average number of days it takes each user to enroll their leads on the Lead to Enroll by User Report, click on the highlighted "Toggle Archived Rep Uses" button at the bottom of the table.

Personalized Recording Logs

This report shows you all the data associated with the personalized audio/video messages - that your organization's Users have been sending to their Leads.

- The table provides a good understanding of how many messages a User has sent over their lifetime on the platform.
- You can also see what proportion of these messages include personalized audio and video messages.
- Additionally, you can also click on any row on the table to let a popup of exactly what personalized messages were sent.
    - This is also custom searchable between specific date ranges that you can filter by. The popup prompt will also allow you to open up and view the message, if you so choose, on a new tab within your browser window.

NOTE: *This reporting is for personalized messages sent via EDlumina's recording engine ONLY. It does not include any attachments or hyperlinks that may have been created elsewhere.*


Personalized Recording Logs

NAME	EMAIL	PHONE NUMBER	LAST LOGIN	LEAD COUNT	MESSAGES SENT	RECORDINGS SENT	PERSONALIZATION PERCENTAGE
Demo User	ashley.gottschalk+1@cyanna.com		10/19/2022	28	78	0	0%
Rep User	demo@cyanna.com		01/30/2023	63	268	0	0%
Samantha Bauer	samantha.bauer+demo@cyanna.com		06/14/2023	14	80	0	0%

Load Archived Rep Users

1 of 1

Total Reps: 3

Fig.5.4.A: To check all the data associated with the personalized audio/video messages that your organization's archived users have been sending to their leads, click the highlighted "Load Archived Rep Users" link at the bottom of the table.