



LIAISON
CAS
experience
JULY 24-25 2023
CHICAGO, IL

Working with WebAdMIT's Data Extraction Tools

July 25, 2023



Meet Our Presenter

Reggie Ross
Learning Strategist
Liaison





Agenda

In this session, we'll discuss:

1. WebAdMIT's export options
2. Advanced Export Manager features
3. Working with the Report Manager
4. Working with the PDF Manager
5. Working with the SFTP features
6. Understanding the WebAdMIT API

Types of Data Exports

WebAdMIT offers different ways of exporting your data:



Export Manager

Allows you to extract files containing selected applicants and data elements.



Report Manager

Allows you to select from a suite of pre-defined reports to run against the applicant group of your choice.



PDF Manager

Allows you to download applicant documents in bulk.



Working with the Export Manager

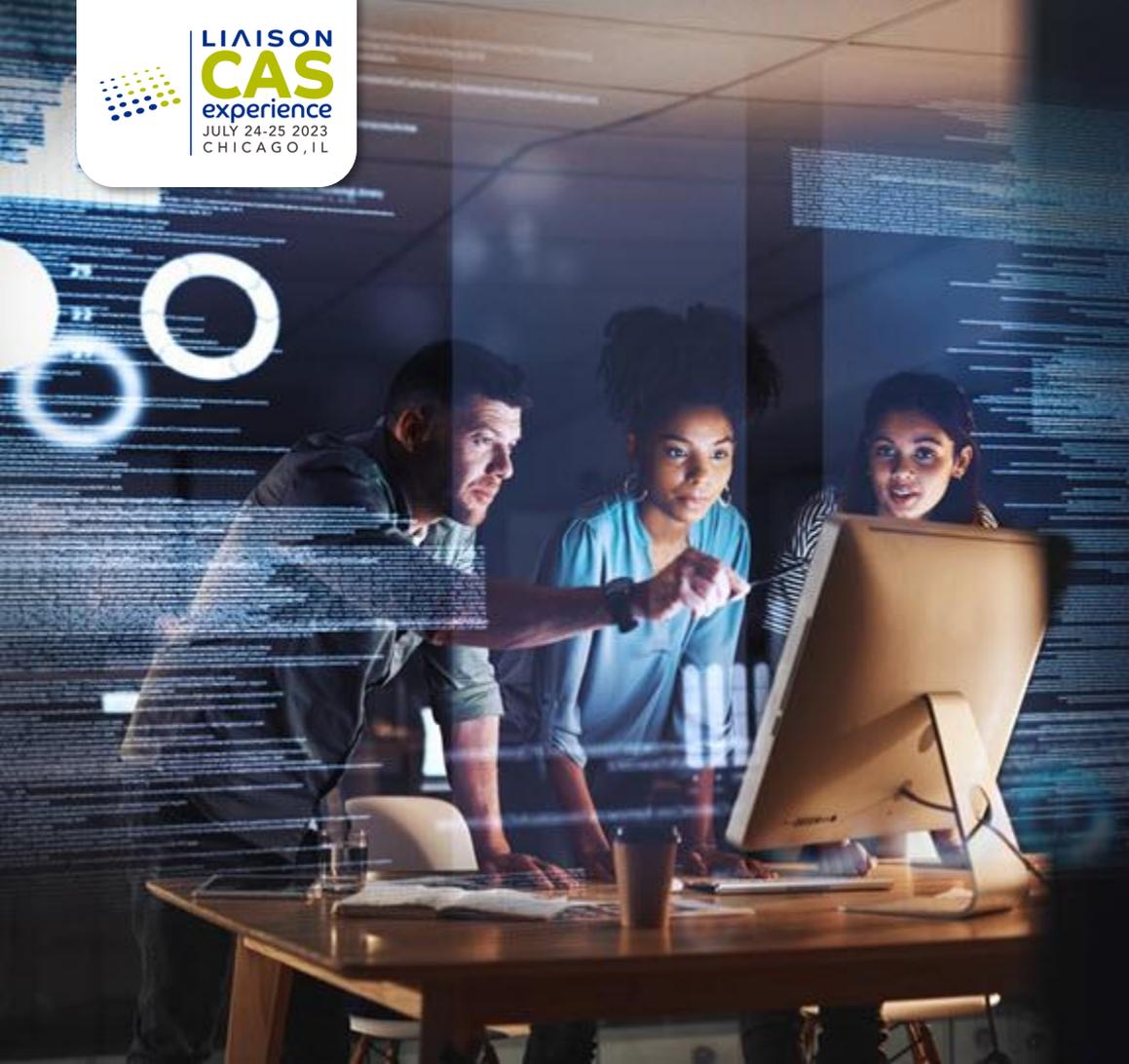


Working with the Report Manager



Working with the PDF Manager





Working with WebAdMIT's SFTP Features



Destination Manager

Edit Destination Settings

Destination Name

Host / Default Path /

Port

Authentication Password

Username

Password/Passphrase

Export: States

Date Time Repeat

Destination

Destination

Notifications

Email Success Error +

S E

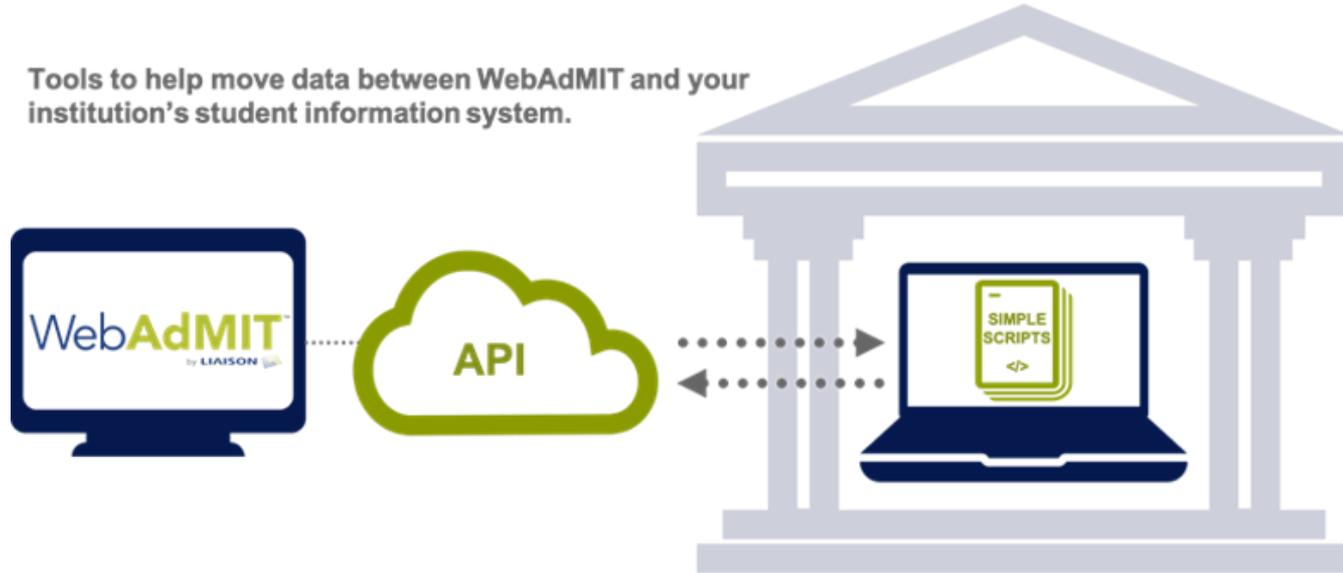
There are no schedules specified



Working with the WebAdMIT API

Application Programming Interface (API)

Tools to help move data between WebAdMIT and your institution's student information system.





WebAdMIT Help Center

https://help.liasionedu.com/WebAdMIT_Help_Center

The screenshot shows the WebAdMIT Help Center homepage. At the top, there is a search bar with the text "How can we help you?". Below the search bar is a navigation bar with the "WebAdMIT Help Center" logo. The main heading is "WebAdMIT Manual". A welcome message states: "Welcome to the WebAdMIT Help Manual! The categories on this page have been arranged to aid new users in learning the software. All of WebAdMIT's features are categorized by topic and functionality. Note that there is a lot of crossover between WebAdMIT features and functionalities; be sure to look out for the hyperlinks to find those crossovers. Check out the WebAdMIT Glossary for commonly-used terms and definitions." Below this are four main content boxes, each with a title, an icon, a brief description, and a list of sub-topics:

- Navigating WebAdMIT**: This guide shows you how to quickly find the information you're looking for in WebAdMIT. Sub-topics include: Dashboard, Applicant Details Page, Customizing the Applicant Header, Direct Applicants, Early Decision Applicants, and more.
- Creating and Managing Users**: Here you'll find guidance on adding new users to WebAdMIT and assigning them the permissions of your choosing. Sub-topics include: Creating Work Groups and Creating Users.
- Categorizing Applicants**: Here you'll learn how to search for, group, and organize all of your applicants in WebAdMIT. Sub-topics include: Searching for Applicants, Local Statuses, List Manager, List Manager - Composite Lists, Using the Clipboard, and more.
- Corresponding with Applicants**: This guide walks you through creating, managing, and tracking messages sent to your applicants in WebAdMIT. Sub-topics include: Sending Emails, Email Templates, Email Addresses, and Viewing Email History.

A diverse group of people in a modern office setting. A woman in the foreground is raising her hand, smiling. Other people are visible in the background, some looking towards the camera and others looking away. The overall atmosphere is positive and professional.

Q&A

The logo for the Liaison CAS experience. It features a stylized graphic of a cluster of dots in white and yellow on the left. To the right of the graphic, the text reads "LIAISON" in a small, white, sans-serif font, "CAS" in a large, bold, yellow, sans-serif font, "experience" in a smaller, white, sans-serif font, and "JULY 24-25 2023" and "CHICAGO, IL" in a small, white, sans-serif font stacked at the bottom.

LIAISON
CAS
experience
JULY 24-25 2023
CHICAGO, IL

Thank You

Liaison Academy
Education & Knowledge Team
academy@liaisonedu.com