



LIAISON
CAS
experience

JULY 24-25 2023
CHICAGO, IL

Working with WebAdMIT's Data Extraction Tools

July 25, 2023



Meet Our Presenter

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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

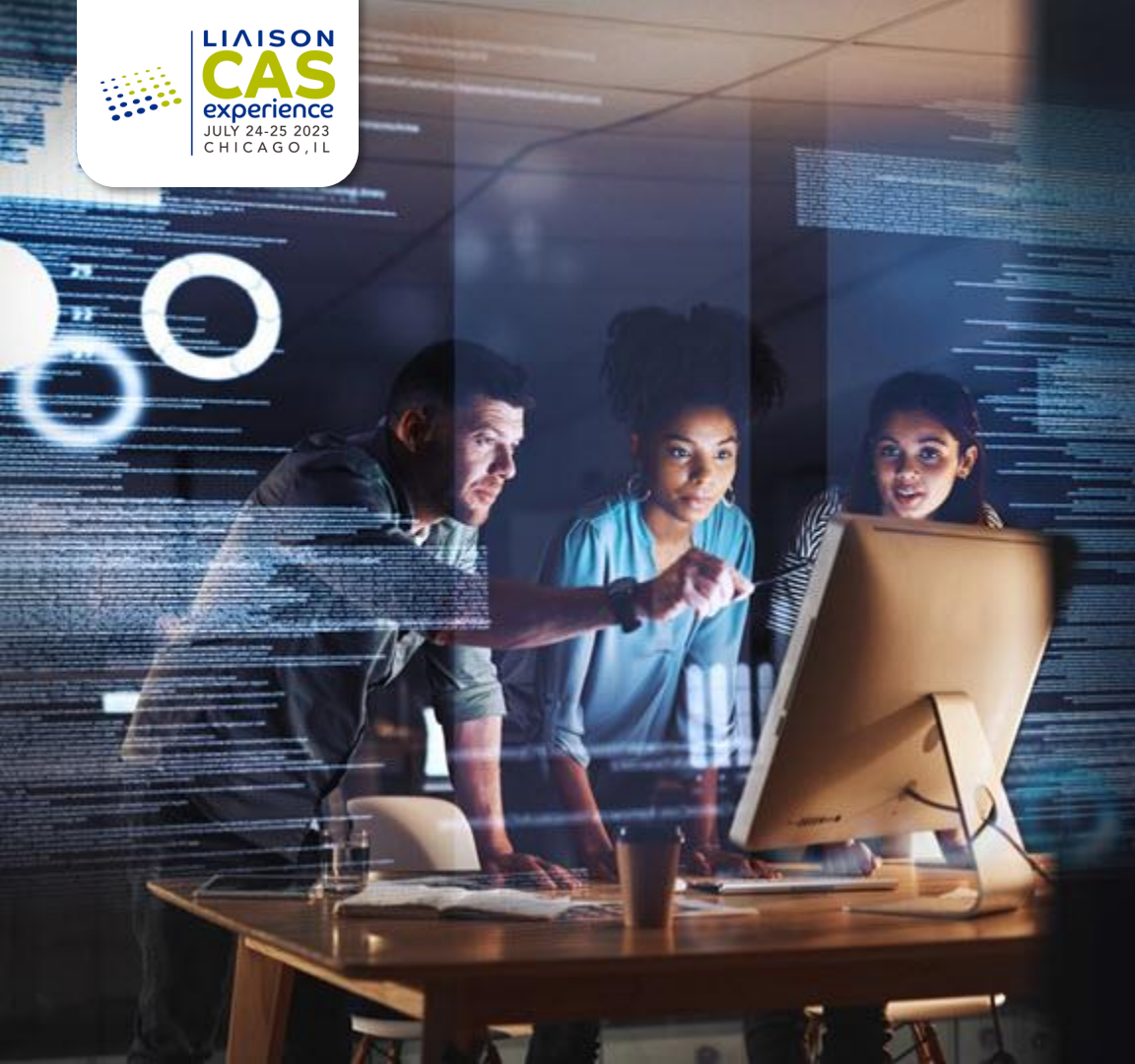


Working with the Report Manager



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

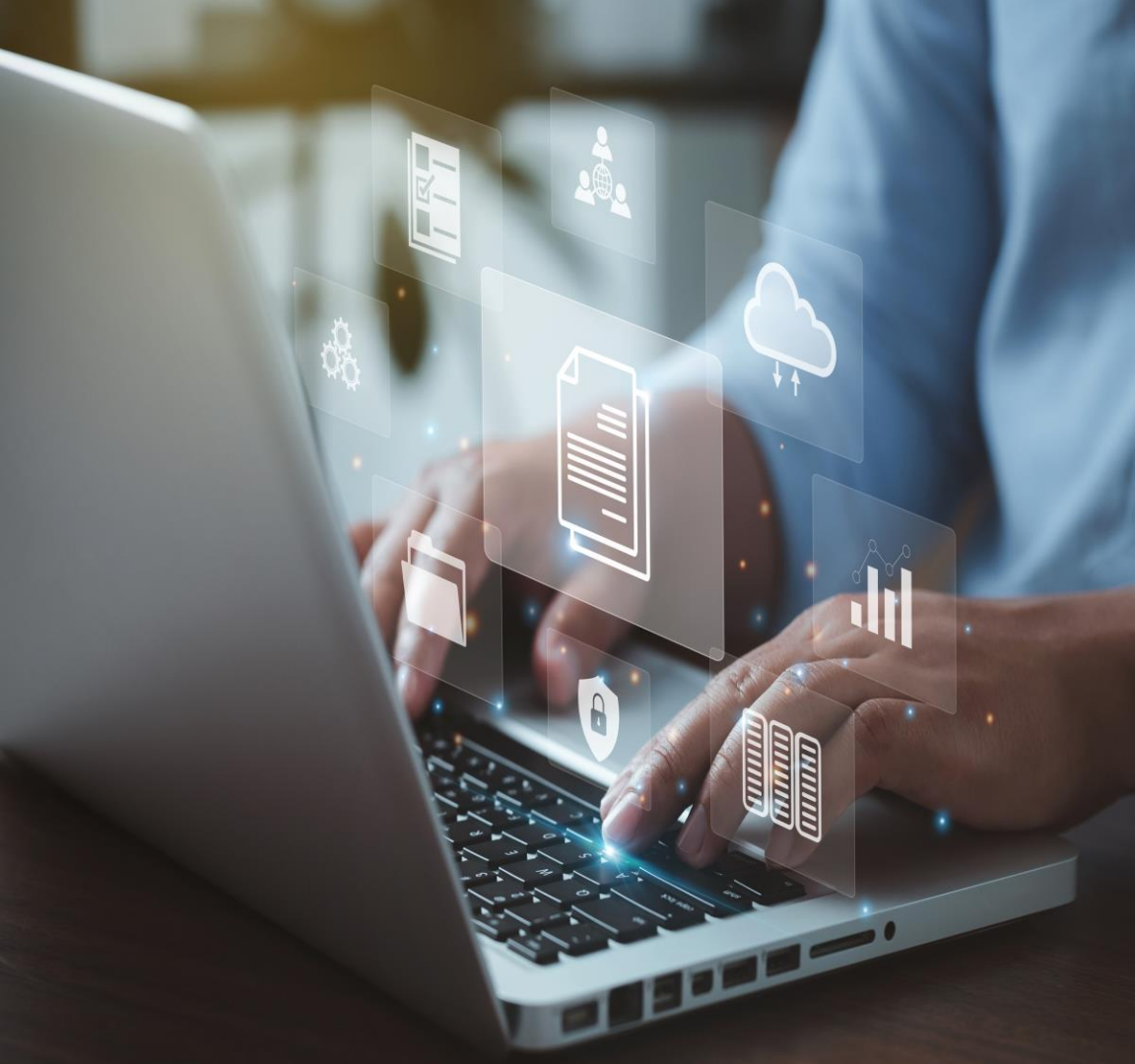
Destination

Notifications

Email Success ☐ Error ☐

S E

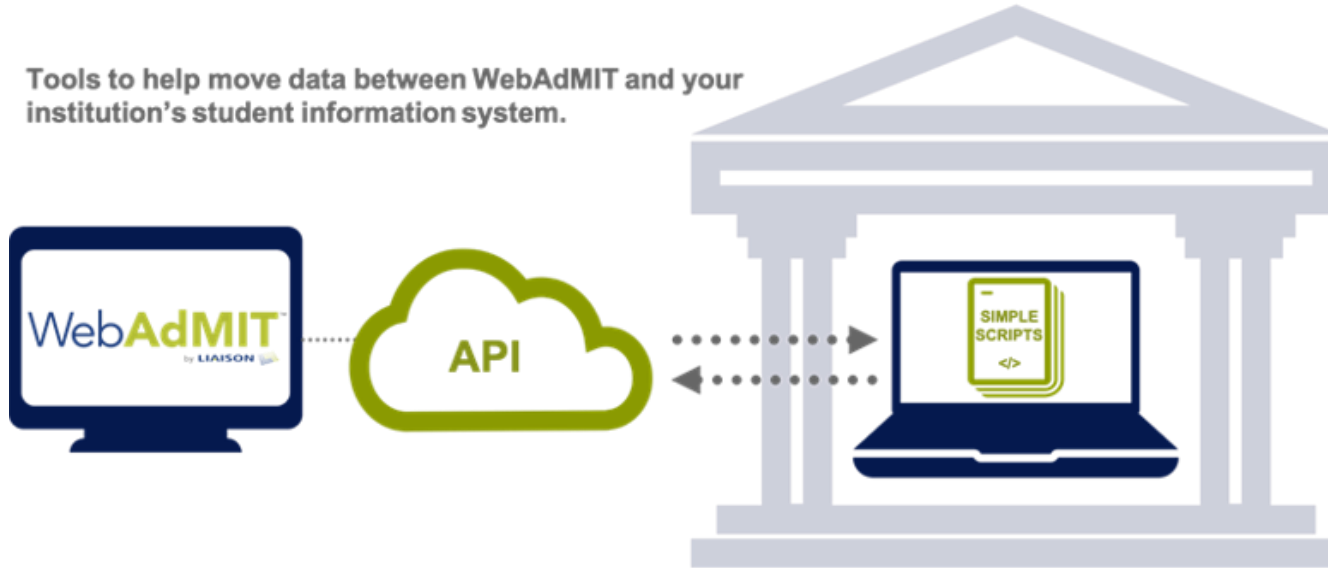
There are no schedules specified



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.liaisonedu.com/WebAdMIT_Help_Center




WebAdMIT Help Center

WebAdMIT Manual


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.




Navigating WebAdMIT

This guide shows you how to quickly find the information you're looking for in WebAdMIT.



- Dashboard
- Applicant Details Page
- Customizing the Applicant Header
- Direct Applicants
- Early Decision Applicants


...



Creating and Managing Users

Here you'll find guidance on adding new users to WebAdMIT and assigning them the permissions of your choosing.

- Creating Work Groups
- Creating Users




Categorizing Applicants

Here you'll learn how to search for, group, and organize all of your applicants in WebAdMIT.

- Searching for Applicants
- Local Statuses
- List Manager
- List Manager - Composite Lists
- Using the Clipboard

...



Corresponding with Applicants

This guide walks you through creating, managing, and tracking messages sent to your applicants in WebAdMIT.

- Sending Emails
- Email Templates
- Email Addresses
- Viewing Email History

A diverse group of people, mostly young adults, are seated in an audience. A woman in the center, with long braids, is smiling and raising her right hand. To her left, a woman with long brown hair is also smiling. Other people in the background are blurred but appear to be engaged. The entire image has a blue tint.

Q&A

The logo for the Liaison CAS experience. It features a cluster of yellow and white dots of varying sizes to the left of the text. The text is in a sans-serif font, with 'LIAISON' in small caps, 'CAS' in large bold letters, 'experience' in lowercase, and the dates and location in small caps.

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Thank You

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