

How-To Guide

REPORTING TOOLS

Welcome to the SheerID Reporting Tools Guide

This guide will help you get the most out of SheerID's Verification Reports. These reports provide you with intelligence and insight into consumer eligibility verification results, demographics, and behavior. Using our reporting tools, you can download on-demand extracts in CSV format of verification activity for a selected time period so that you can dig into the effectiveness of a campaign or promotion - in real-time - as it is happening. You can access the Reporting Tools from within your Control Center account.

Accessing Verification Reports

In order to access the Verification Reports, login in to the SheerID Control Center using your user account credentials. Contact your system administrator or kirk@sheerid.com for assistance if you don't currently see the Reporting Tools/Verification Reports in your account's Control Center.

Using the Verification Reports

1. In the Control Center, select Verification Reports in the Reporting Tools section. This is the report request interface.

The screenshot shows the SheerID Control Center interface. At the top left is the SheerID logo, and at the top right are 'Log Out' and 'Control Center' links. The main content area is a form for generating a report. It includes a 'Date Range' section with 'Start Date' and 'End Date' input fields, a right-pointing arrow, and a note: 'Results will include data from the beginning of the Start Date to the end of the End Date specified (all times UTC)'. Below this is the 'Report Type' section with radio buttons for 'Billing' (selected) and 'All Verifications', and a note: 'Billing reports do not include duplicate requests for which there is no fee'. The 'Person Data' section has a checkbox for 'Include name and email address (if available)'. The 'Report Options' section has a checkbox for 'Send me an email when this report is ready'. A green 'Generate Report' button is at the bottom of the form. Below the form is a light blue information bar with an 'i' icon and the text: 'For a detailed description of the data available in these reports, view the report data documentation.' At the bottom of the screenshot is a table header with three columns: 'Timestamp', 'Status', and 'Actions'.


2. Here is an explanation for each of the report request fields:

- **Date Range** is required. Use the date picker to select your Start Date and End Date for the report. For performance, it is best practice to limit this range to one month at a time.
- **Report Type** default is Billing. This will provide you with a report that can be used to reconcile your invoice. Selecting All Verifications will include requests that you are not charged for such as verifications with the same last name submitted within 15 minutes, considered duplicates, verifications with errors due to a data source being unavailable, and verifications submitted with a SheerID email for testing purposes.
- **Person Data** by default is not checked. If name and email are available in the request record, it can be included in the report by checking this box. Including this data in the report will allow you to reach out to individuals that may not have completed the verification process.
- **Report Options** will send you an email when the report is complete if the box is checked. This can be helpful for large reports that take some time to complete.

Once you have defined your report, click on the Generate Report button. The lower part of the screen will display information about the requested report and will display a Download Report option when the report is complete.

Timestamp	Status	Actions
Wed Aug 03 2016 11:31:40 GMT-0700 (Pacific Daylight Time) 1956dd	COMPLETE	Download Report Delete Report
Wed Aug 03 2016 11:30:20 GMT-0700 (Pacific Daylight Time) 1197bc	COMPLETE	Download Report Delete Report

3. Click on Download Report to download the CSV file to your system. Below is detail on each of the columns available in the report. This information is also available in the SheerID Developer Center (<http://developer.sheerid.com/docs/report.html>) and via the on screen link

 For a detailed description of the data available in these reports, view the [report data documentation](#).

A Glossary can be found at the end of the document.

- **Request ID** is a SheerID unique identifier for the verification request.
- **Request Timestamp** is the date and time of the original request or the stamp of the most recent revision.
- **Account ID** is the SheerID unique identifier for the client account that submitted the request.
- **Person ID** is the SheerID unique identifier for a set of individual identifying data that can be used to recognize duplicate submissions of the same data and to enforce a same person limit policy.
- **User ID** is a SheerID unique identifier for the account owner user for the account that submitted the verification request.
- **Username** is the account owner user name for the account that submitted the verification request.

- **Result** is the verification request result. There are three possible values for this data element:
 - **TRUE** indicates that the data for the individual requesting eligibility verification has been matched to a Verification Source, or approved using Document Review, with one of the requested affiliation types (see Requested Affiliation Types below).
 - **FALSE** indicates that the data for the individual requesting eligibility verification has been matched to a Verification Source, or reviewed using Document Review, but does not have one of the requested affiliation types (see Requested Affiliation Types below). Comparing the Requested Affiliation Type data with the Confirmed Affiliation Types for records with FALSE results in the report may illuminate an area in the user experience that could be improved.
 - **[Blank]** indicates that there was not a match of the data for the individual requesting eligibility verification. This often means that the individual was asked to upload a document for Document Review Verification and chose not to. Reaching out to these individuals with a follow-up email may encourage them to upload a document and complete the eligibility verification process.
- **Status** is the current status of the verification request. There are four possible values for this data element:
 - **NEW** indicates that the verification request has not yet been submitted to any Verification Source.
 - **PENDING** indicates that the final response from verification sources has not been received. Requests with this status have either not completed Document Review Verification or are in-progress of verifying with University Portal Login verification.
 - **OPEN** indicates that the verification request has been submitted to a verification source but the individual has not been matched. In general, OPEN status will all have a blank Result. These are individuals that may benefit from an email to encourage them to complete the verification process.
 - **COMPLETE** indicates that the verification request has been submitted to a verification source and the individual has been matched and has a result of TRUE or FALSE.
- **Errors** are a list of errors encountered during the process for this verification request and are key to understanding the request results. For example, the document review process will present reasons for rejection here. Some examples are "Document does not match expected document type", "Document does not display current or valid date".
- **OrganizationEntityID** is the SheerID unique identifier for the requested organization.
- **Organization Name** is the name of the requested organization.
- **Organization State** is the State (location) of the requested organization.
- **OrganizationEntityType** is the type of requested organization. Types of organizations are UNIVERSITY, K12, MILITARY, CORPORATE, FIRST RESPONDER.

- **Verification Types** are the types of verification used to obtain a verification result for this verification request. There are three possible values for this data element:
 - **AUTHORITATIVE** indicates that SheerID has attempted to find a match within one of our authoritative data providers.
 - **ASSET REVIEW** indicates that no authoritative verification was attempted and the verification was performed via Document Review.
 - **AUTHORITATIVE, ASSET REVIEW** - indicates that SheerID did not find a match within one of our authoritative data providers, and the individual then uploaded a document for Document Review Verification.
- **Requested Affiliation Types** indicates the type of affiliation that was requested or selected by the individual. Values you will see for this data element will be self-explanatory such as STUDENT_FULL_TIME, FACULTY, VETERAN.
- **Confirmed Affiliation Types** indicates the types of affiliations that the individual was determined to have. The values are the same as the Requested Affiliation Type values.
- **Data Updated Date** is the date that the information was most recently updated by the data source.
- **Period Begin Date** is the start of the most recent status period. This will indicate the most recent term start date for a student or the most recent period of service start date for a military member.
- **Period End Date** is the end of the most recent status period. This will indicate the most recent term end date for a student or the most recent period of service end date for a military member. A blank will indicate that the period is on-going and current.

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- **Organization Name** values will depend on the Organization Type. For UNIVERSITY Organization Type, the values will be the School selected or entered by the individual requesting eligibility verification. For MILITARY Organization Type, the values will be blank. For CORPORATE Organization Type, the values will be the Company (Employer) selected by the individual requesting eligibility verification.
- **Affiliation** is the eligibility segment. For example, for the UNIVERSITY Organization Type, one example of an affiliation is STUDENT_FULL_TIME. For MILITARY Organization Type, an affiliation example is VETERAN.

Thank You

If you need any further assistance don't hesitate to reach out to Kirk Dutton at kirk@sheerid.com. Thank you for choosing SheerID.

The SheerID Customer Success Team