



Reader

A Reader is a specific view of record information where you can source everything from the student record in one place.

It displays a list of records and their fields in rows and columns. Readers help you quickly find, review, and work with your data.



DIFFICULTY
Beginner



ESTIMATED TIME
6 minutes



CATEGORY
Data View



1. Why this matters

Readers give you a flexible way to see the information you need—without building a query every time.

They save time, improve accuracy, and help you make better decisions.



2. Think of it like...

A Reader is like a dashboard for your work. It brings all the important information about each record together in one place so you can review, act, and move forward.



3. The Big Picture

- A Reader delivers an already prepared list of records so you can focus on your process.



Example: Reviewing applications to make admission decisions.



4. Common Misconceptions

- A Reader is the same as a Query. (A query finds records; a reader displays them.)
- Readers update the data. (Readers are read-only views. Reader forms are used to update data, log notes, assign decisions and more.)
- All users see the same data in a Reader. (Access is based on permissions.)
- If I change the data, the Reader won't reflect it. (Readers always show the most current data.)



5. Key Takeaways

- Readers are saved views of data.
- They help you see what's important, fast.
- Customize fields, filters, sorting, and grouping.
- Save and share readers to stay consistent.
- Readers are the starting point for Action Sets and Exports.



Common Uses

- ✓ Review records in a base
- ✓ Track student progress
- ✓ Monitor applications
- ✓ Manage tasks and follow-ups
- ✓ Prepare for reporting or exports
- And many more!



Reader Features

- Choose which fields (columns) to display
- Filter to narrow results
- Sort and group data
- Save for reuse
- Share with others
- Export to Excel



Best Practices

- ✓ Use clear, descriptive names.
- ✓ Keep frequently used readers organized in bins.
- ✓ Limit tabs to what you need.
- ✓ Limit columns to what you need.
- ✓ Test filters and sorting.
- ✓ Share readers with your team to save time.



Next Concepts

- Queries
- Datasets
- Exports
- Action Sets
- Deliver

