Getting Started with Synergy SIS

Synergy®
Education Platform

Edupoint®

About This Manual

Edupoint Educational Systems, LLC. develops software with multiple release dates for the software and related documentation. The documentation is released in multiple volumes to meet this commitment.

This document serves as a reference for Edupoint's recommendations and Best Practices for Synergy processes. Due to the complex nature and myriad configurations possible within the Synergy software, it is not feasible to include every possible scenario within this guide.

Conventions Used in This Manual

- **Bold** indicates user interactions such as a button or field on the screen.
- *Italics* indicate the option to select or text to enter.
- Notes, Tips, References, and Cautions display in the margin to provide additional information.

Notes provide additional information about the subject.	Tips suggest advanced options or other ways of approaching the subject.
References list another source of information, such as another manual or website.	Cautions warn of potential problems. Take special care when reading these sections.

Before You Begin

Before installing any of the Edupoint family of software products, be sure to review the system requirements and make sure the district's computer hardware and software meet the minimum requirements.

Software and Document History

Document Version	Release Date	Software Release	Description
4.0	May 2017	2018	Updates: • Added Enhanced Standard Navigation to Navigation Options • Added Snapshot Views and Autosave Option to Parts of the Synergy SIS Screen • Added Snapshot Views detail in Snapshot Views • Added Autocomplete Search Lookups and Autocomplete Advanced Mode to Search by Primary Field • Added Search Using Grids • Added Creating Widgets from Search Results • Updated sample weather widget in Sample External Image Widgets

Document Version	Release Date	Software Release	Description
5.0	Sep 2017	-	Updates: • Added Formatting Window instructions to Synergy How-To • Updated images for quality and consistency
6.0	Dec 2017	2018.01	Updates: • Moved Screen Options section from Parts of the Synergy SIS Screen to Synergy Options Menu • Moved Dashboard Control Security to the *Synergy SIS – System Administrator Guide* • Added **Don't Pin Grid Headers**, **Show Docking Area**, Accessibility Mode keyboard shortcut, **Use The Default AutoFocus Fields**, and **Resume on Login** to Synergy Options • Updated external widget examples to show link to external site in Types of Dashboard Widgets and Sample External Image Widgets • Updated Grid Columns to reference fixed header rows, **Suppress Grid Tooltips**, and Delete All Records options in Parts of the Synergy SIS Screen • Updated the History Panel section in Parts of the Synergy SIS Screen • Added note about cursor position and student attendance in Snapshot Views • Updated the description for and the About icon in the Action bar in Parts of the Synergy SIS Screen • Updated High Contrast theme options and added note about past or future screen focus colors in Synergy Options Menu • Added Using Multiple Find Conditions to Search Using Multiple Fields • Added Synergy Docking Panel and Synergy Accessibility
7.0	Mar 2018	-	Updated the Content Area section of Parts of the Synergy SIS Screen to provide clarification on what this area contains
8.0	Jun 2018	2019	Updates: • Reorganized content for better flow and clarity • Updated Focus to include **Years** listed in descending order • Updated the Note in Synergy Docking Panel to include that they are restricted to the users who created them • Added Using New Feature Assist

Document Version	Release Date	Software Release	Description
9.0	Dec 2018	2019.01	Updates: • Moved content from Introduction chapter to Your Synergy SIS Account and Using Synergy SIS chapters • Added Auditing Overview • Added Logging in with Two Factor Authentication to Introduction • Updated Quick Launch in Navigation Options • Updated Quick Nav in Navigation Options • Added Continue Where You Left Off Panel to Navigation Options • Updated Resume on Login in Synergy Options • Added Memo Templates to Using Synergy SIS • Updated Grids in Parts of the Synergy SIS Screen • Added Pasting Lists from Text Editors to Synergy How-To • Updated Search Using Find Result to include last page and total row display • Updated Focus to include Focus History functionality
10.0	Jun 2019	2020	Updates: • Reorganized content for better flow and clarity • Updated screenshots throughout • Added Large Notification Icons • Added green banner functionality to Login Screen

Document Version	Release Date	Software Release	Description

11.0	Mar 2020	2021	Updates:
			• Added the following in Grids:
			  • Export Options
			  • Hiding and Reordering Columns
			  • Creating and Modifying Presets
			• Added Searching Setup Options in Introduction to Synergy SIS
			• Added Loading Find Results Immediately in Searching Using Find Result
			• Updated Feedback Button to include screenshots
			• Added the following in Synergy Options:
			  • Grid Detail Type
			  • Enable Snapshots
			• Added Unpin Tab Panels in Options
			• Added content for **Save And Close** and **Undo And Close** options in Edit/Find/Save
			• Added Checklists in Action Bar
			• Removed content for Classic version
			• Updated Show Docking Area in Options for displaying control labels as links in the docking panel
			• Added a note for viewing Contacts in student Snapshot Views in Student
			• Added Setting Checklist Security in Your Synergy SIS Account
			• Updated Add a Memo Template for sharing templates across the district and between schools
			• Added Using Snooze and Don't Remind Me Again in Using New Feature Assist

Table of Contents

Chapter 1:
Preparing to Use
Synergy SIS

Synergy SIS Overview

What is Synergy SIS?

Synergy SIS belongs to a category of software called student information systems, or SIS. Student information systems are used by schools to record essential student information such as a student's name and address, grades, and classes.

Why is Synergy SIS special?

Synergy SIS uses a web-based interface as opposed to other systems that have a Windows-based interface. A web-based interface means the software is accessed using a web browser like Internet Explorer. A Windows-based interface is a separate program installed on a Windows-based computer.

Is the information as secure?

Just because a web browser is used to access the software does not mean the software or information contained within it is available on the Internet! Any program can use a web interface. Each district can choose whether to make Synergy SIS available on the Internet or only from the internal district network.

Preparing Your Browser Before You Start

Before accessing Synergy SIS, make the following changes to the web browser (Internet Explorer, Firefox, etc.) so that Synergy SIS works correctly.

Uninstall Toolbars

The Google toolbar, Yahoo toolbar, and any other extra toolbar will prevent Synergy SIS from working correctly. Uninstall any extra toolbars if they are installed.

Allow Pop-Ups

The pop-up blocker blocks certain Synergy SIS screens. Either turn off the pop-up blocker or set it to allow pop-ups for Synergy SIS.

1. Click the yellow banner that displays at either the top or bottom of your screen.
2. Select **Always Allow** pop ups from this site.
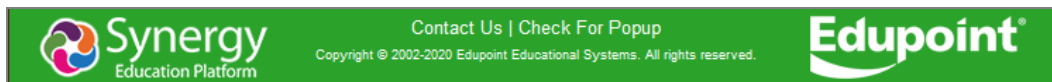
Connecting to Synergy SIS

1. Open a new browser window.
2. Navigate to the web address of the Synergy SIS web server provided by the district system administrator to access the Synergy SIS system.
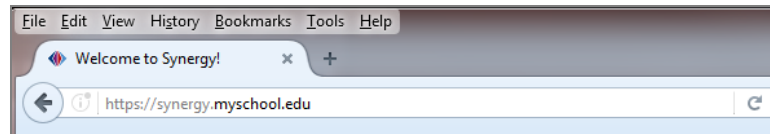
Synergy SIS Example Web Address

Login Screen

There is a green banner at the bottom of the Login screen that provides additional functionality in the form of links.

Login Screen

Contact Us

Districts can set this up to open a new email to a designated email address using your default email provider.

Check For Popup

This opens a message indicating whether or not a pop-up blocker is currently active on your browser.

Add This Page to My Favorites
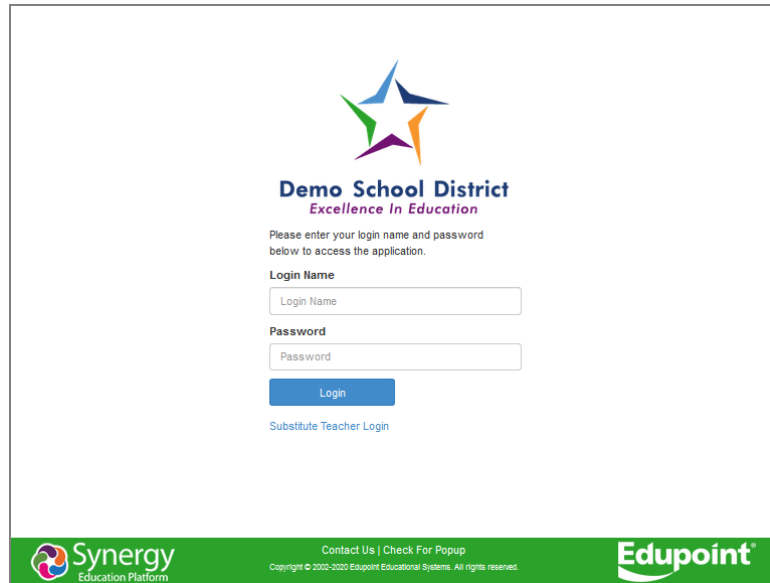
This creates a Favorite in your Microsoft Edge or Internet Explorer browser for quick access to your Synergy SIS site.

> Other internet browsers do not support this functionality. You can create your own bookmark in these browsers for quick access to your Synergy SIS site.
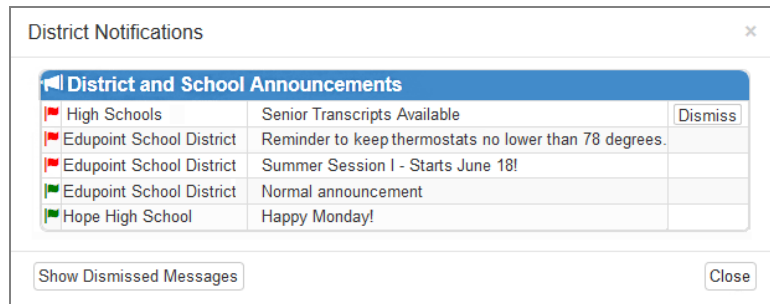
Logging in to Synergy SIS

1. Enter your **Login Name** and **Password**.

Login Screen

2. Click **Login** or press the Enter key. Initially, a pop-up screen displays district and school announcements.

District Notifications Window

3. Click the **X** at the top right or click **Close** at the bottom right.

The Synergy SIS Home page displays district/school announcements. You can customize this screen to display dashboard task lists and a variety of widgets.

> See [Customizing the Dashboard](#) and [Overview of Dashboard Widgets](#) for more information on setting up the dashboard and widgets.

Synergy SIS Home Screen

Logging in with Two Factor Authentication

When two factor authentication is enabled, the Two Factor Authentication Validation screen opens each day you log in or only the first time you log in depending on the setup option chosen by your administrator.

1. Log in to Synergy. Synergy emails you a two factor authentication code.
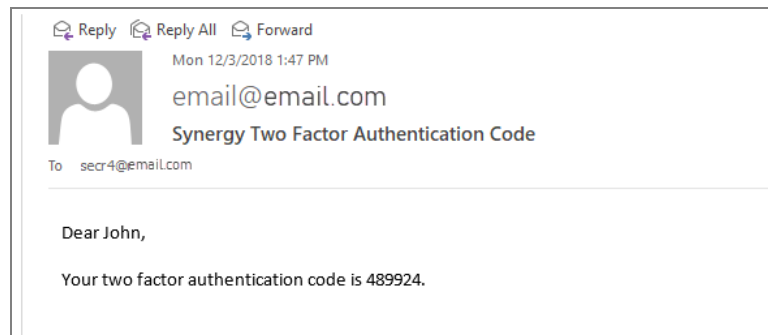
Authentication Code Email

2. Enter the **Authentication Code** provided in the email.

Two Factor Authentication Validation Screen

3. Click **Continue** to provide the second authentication and log in to Synergy.

> **Return To Login Page** takes you back to the Synergy login page and does not complete the second authentication.
>
> **Resend Code** emails you a new authentication code.
>
> You have five attempts to correctly enter the authentication code emailed to you. The number in the message: "You have 5 left with this code" decreases by one with each incorrect entry. A new authentication code is emailed to the user after five incorrect entries and the number in the message resets to five.

Chapter 2:
Introduction to
Synergy SIS

Parts of the Synergy SIS Screen

The main areas of the Synergy SIS screen are the Title Bar, Action Bar, Content Area, Primary Navigation Panel, PAD Tree Panel, Bookmarks Panel, History Panel, and Feedback Button.
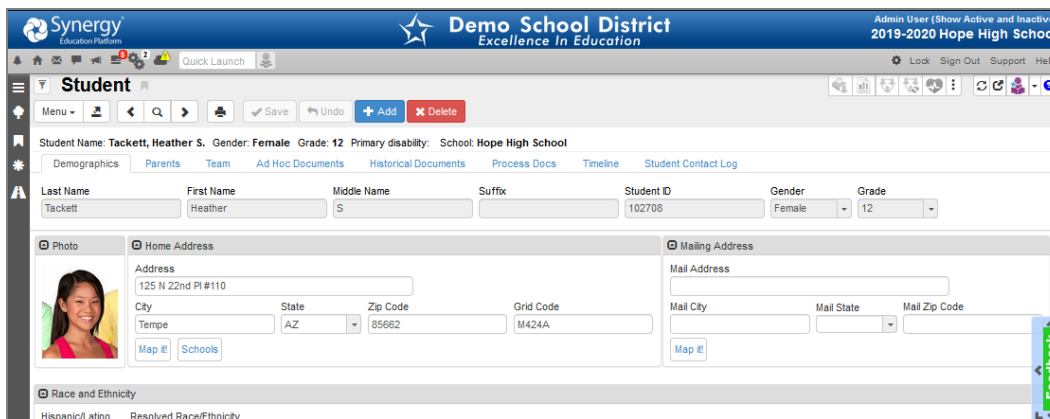
Synergy SIS Student Screen

Title Bar

The Title Bar contains the About button, Focus Area, navigation controls, screen options, and support links.


Synergy Title Bar

About System

Clicking the Synergy logo opens a screen that provides the product version information.

Synergy Logo

Focus

Each Synergy SIS user is set up to look at records for a specific school and year by default. The combination of school and year is called the Focus. The Focus sets whether inactive, active, or both types of student records display. Your current focus displays at the top right-hand corner of the screen. Sometimes you may need to change your focus to a different year or to a different school.
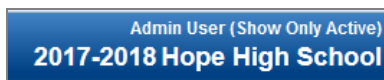
Focus Area

Changing the Focus

1. Click the focus area. The Change Focus window opens.

2. Select the **Year** to change to a different school year or session. The school years display in descending order.

3. Click **Organization** and select from an alphabetized list or click the Tree icon to select a different organization from a categorized list.

> You can set the focus to the district or other organizational grouping; however, student information can only be edited when focused at a school.
>
> You can view the information at the district or other organization group level but you cannot change it.

Change Focus Screen

4. Select from **Show Active Only**, **Show Inactive Only**, or **Show Active and Inactive** to change the type of student records that display.

5. Click **Save**. The screen refreshes.

Viewing Focus History

Synergy stores your last five focus changes in the **Focus History** drop-down on the Title Bar. You can change the focus for only the detached views that have a scroll bar.

> Changing your focus on the main and detached screens act independently.
>
> **Focus History** stores all unique combinations of the **Organization**, school **Year**, and **Show Students** selection.
>
> The most recent focus displays first.

Hover over the Focus to display the **Focus History** drop-down.

The Health screen is an example of an Organization year-aware screen. Changing the focus on the screen might change the tabs that display.
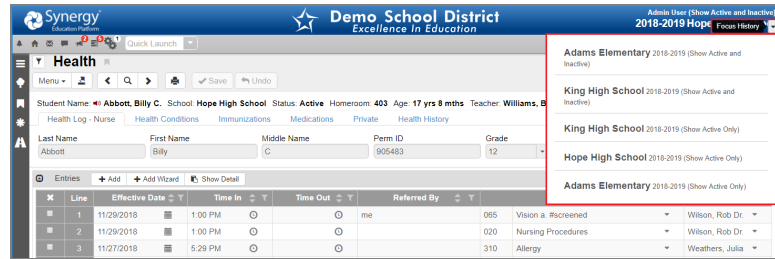
Health Screen

The detached view of an Organization year-qualified screen, such as the Daily Attendance screen, does not show the sub-nodes.
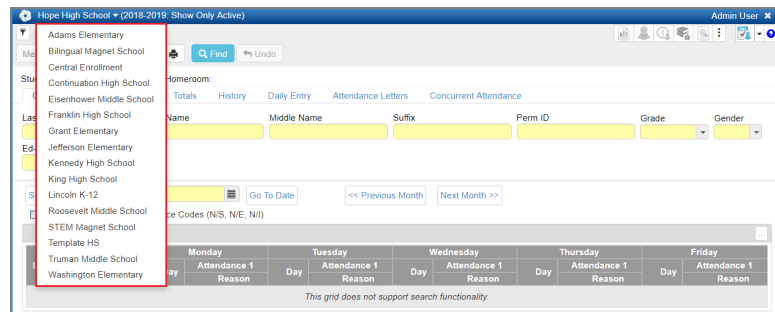
Daily Attendance Screen
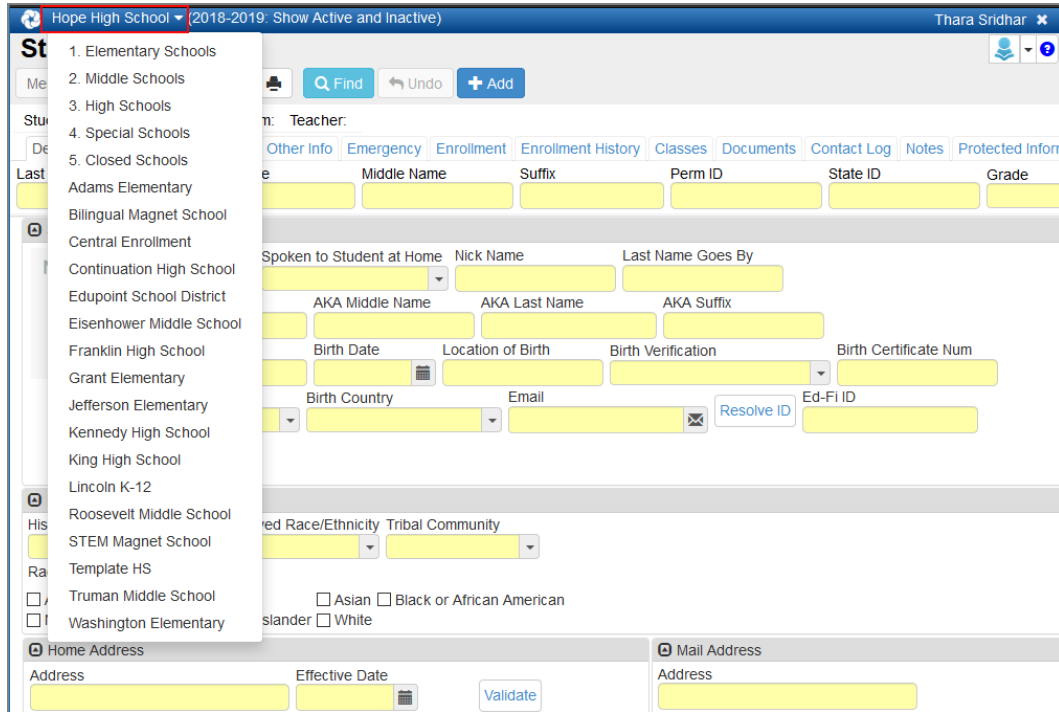
Changing Focus on Detached Views

The following example shows how to change the focus on detached views for **Organizations**, school **Year**, and **Show Students**.

1. Navigate to **Synergy SIS > Student > Student**.

2. Click to open the Student screen in a new window.
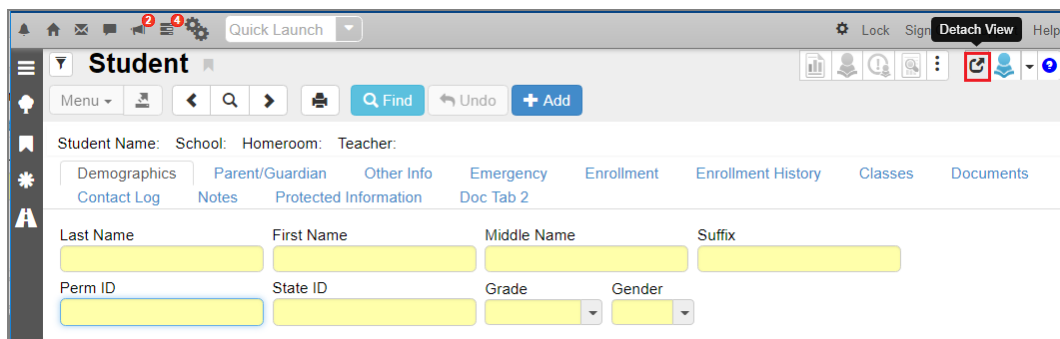
Student Screen

3. Click **Hope High School** to change the focus to another school.

Student Screen

4. Hover over the school year to activate the drop-down.

5. Select another school year.
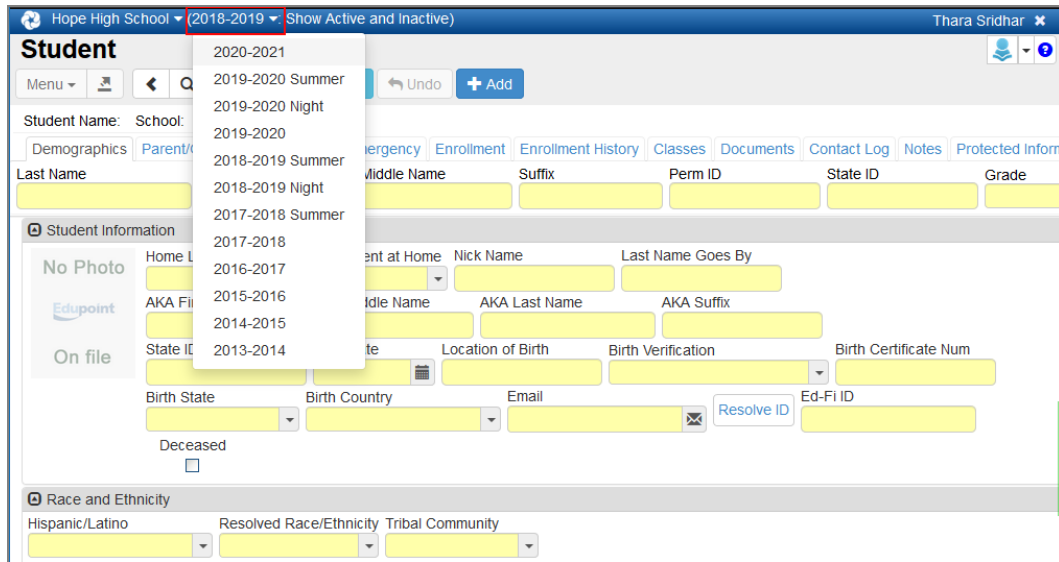
Student Screen

6. Hover over **Show Active and Inactive** to display the drop-down.

- *Show Active Only* – Displays only active students
- *Inactive Only* – Displays only inactive students
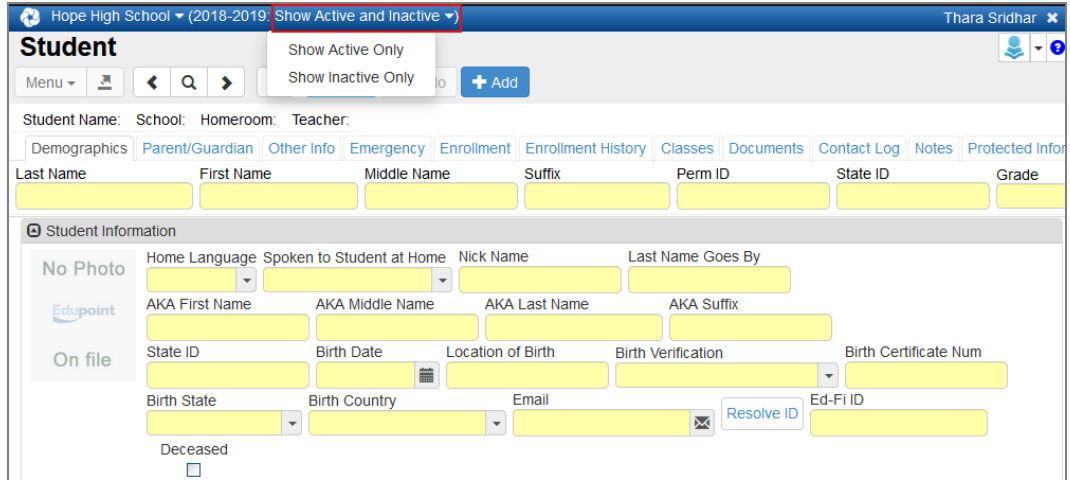
Student Screen

> **Focus History** does not store the focus changes made on the detached views.
>
> The Focus **Organization**, school **Year**, and **Show Students** options that currently display in the detached view do not display as an option in the respective drop-downs when changing the focus.

TeacherVUE

Use the Bell icon to open the TeacherVUE classroom management software, which includes Grade Book.

TeacherVUE Icon

Home

Click the Home icon to return to the Home page at any time from any screen.

Home Icon

Synergy Mail

Click the Synergy Mail icon to open the Synergy Mail email interface. Synergy Mail allows staff, teachers, students, and parents to send and receive email through Synergy applications.

Synergy Mail Icon

Streams

The Streams Collaboration Tool allows you to maintain a running dialog with each other within the Synergy SIS education platform using an easy-to-use and intuitive social media-type interface.
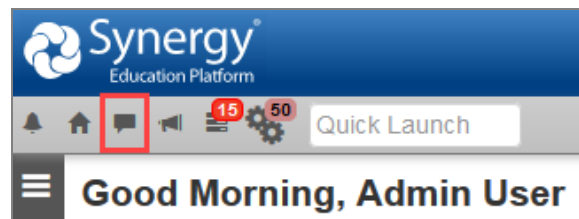
Synergy SIS Home Screen

You can create private Streams to communicate with other staff, in addition to being able to create groups where content can be shared with several users at one time. Communication occurs via posts – users can post documents, web links, and text to a Stream, as well as respond to others' posts.
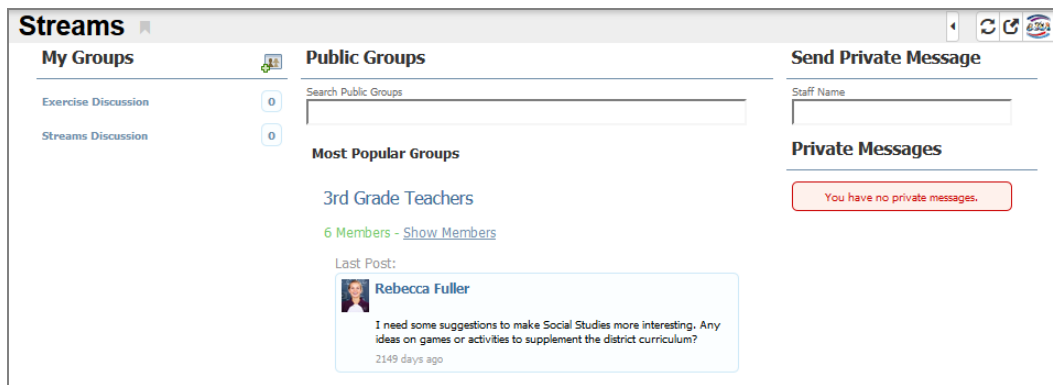
Streams Screen

To encourage and facilitate home and school collaboration, parents and students can communicate with school staff using the **Streams** link icon in various ParentVUE and StudentVUE web portal locations and on the **Streams** tab. The school district enables this feature.

> See the *Synergy SIS – Communications Guide* for more information.

Announcements

Click the Announcements icon to view the district and school announcements screen that displays when you initially log in. The number in the corner of the icon shows the number of new announcements.

Announcements Icon
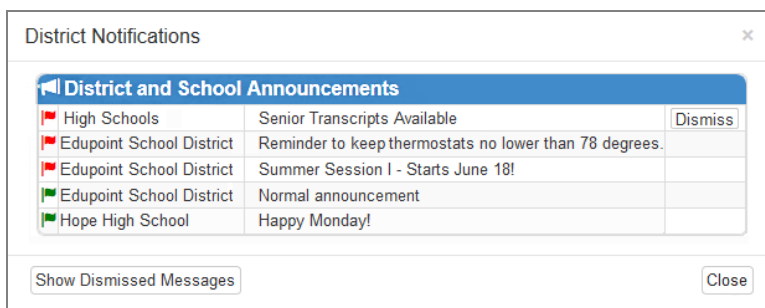
District Notifications Screen

Tasks

Click the Tasks icon to view the tasks assigned to you. These are the same tasks that display on the Home screen. The number in the corner of the icon shows the number of tasks waiting to be addressed.

Tasks Icon

Job Queue

The Job Queue shows the status of reports submitted to process. You can view a snapshot of the status in Job Queue by hovering on this link. The number in the corner of the icon shows the number of new jobs in the queue.

Job Queue Icon

- Click **View** to open the report once the job completes.
- Click **Dismiss** to dismiss the job. You can still view the details of the job from the Job Queue screen.

- Click **JobQueue Viewer** to see the details.

Job Queue Tool

Quick Launch

The Quick Launch bar provides a quick way to *launch* a screen or report by simply typing the name of the screen or ID of the report in the box. It is helpful for experienced Synergy SIS users.

> When focused to the district, this feature only works from student-based screens, such as Student Incident, Health, and Daily Attendance. Using the Find or Scroll options displays students that attend the same school as the student in focus on the main screen.

Synergy Quick Launch

- Entering a few letters displays the screens available that match. Scroll down to select a screen. Click **More...** if the screen you are looking for does not display.
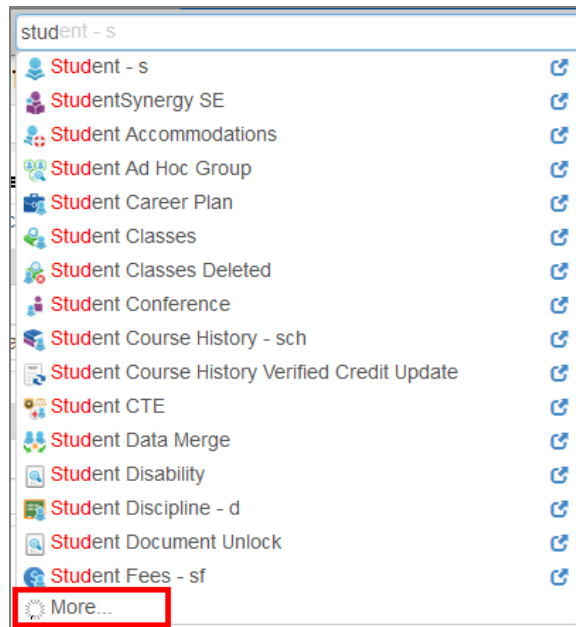
Synergy Quick Launch

Quick Launch Entities

The Quick Launch bar has an additional drop-down option that allows you to select an Entity Type to use for a record search. The Entity Type search allows you to jump directly to a specific record in the related screen. The last three screens in the navigation history display as icons for most entities.

- 🚫 None – Clears records under the Find results

- 👤 Student – Search for Synergy SIS student records using student name or **Perm ID** to open the Student or StudentVUE screens.

- 👤 Student – Search for student records using the student name or **Perm ID** to open the Synergy SE Student screen.

- 📗 Section – Search for section records using the **Section ID** or **Course Title** to open the Section or Health By Section screens.

- 📚 Course – Search for course records using the **Course ID** or **Course Title** to open the Course screen.

- 👥 Staff – Search for staff records using the **Last Name** or **First Name** to open the Staff screen.

- 👥 Parent – Search for parent records using the **Last Name** or **First Name** to open the Parent screen.
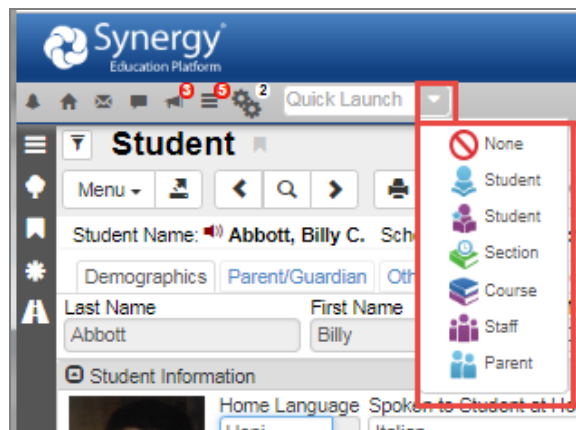
Synergy Quick Launch

Using Synergy SIS Student Entity Type

1. Hover over Quick Launch and select .

2. Enter the student name or **Perm ID** in **Quick Launch** until records display under Find Results.

3. Select the student name to load the student in the current Student screen, or select an icon to open the student's record in that screen.
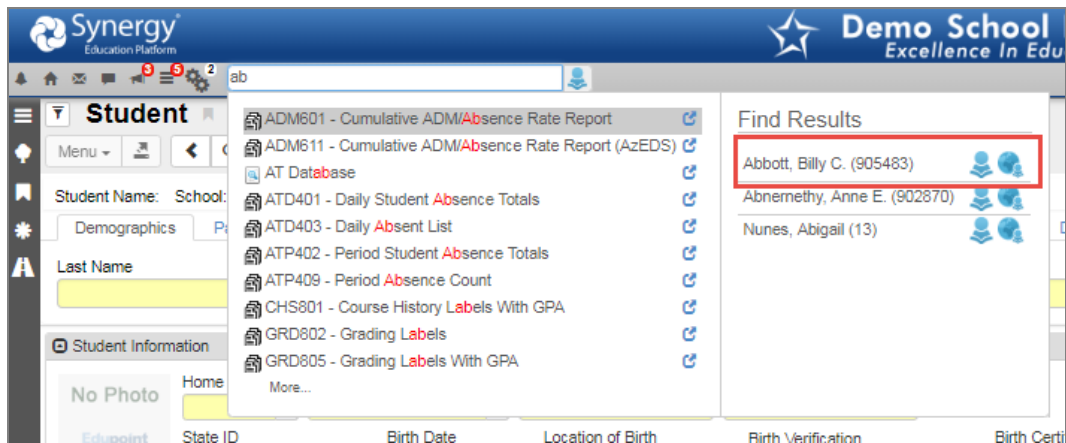
Quick Launch Entities

Using Section Entity Type

1. Hover over Quick Launch and select .

2. Enter the **Section ID** or **Course Title** until records display under Find Results.

3. Select the section to open the record in the current screen, or select an icon to open the section record in that screen.
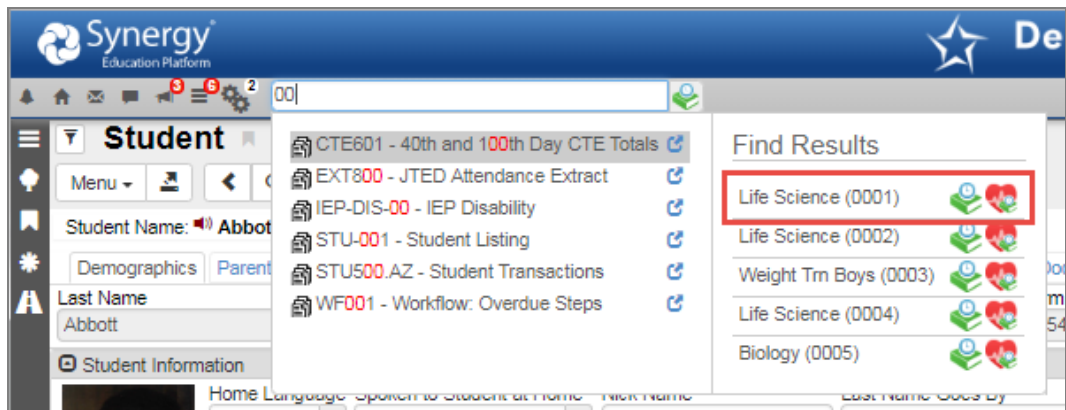
Quick Launch Entities

Using Course Entity Type

1. Hover over Quick Launch and select 📚 .

2. Enter the **Course ID** or **Course Title** until records display under Find Results.

3. Select the course to open the course record in the current screen, or select an icon to open the course record in that screen.
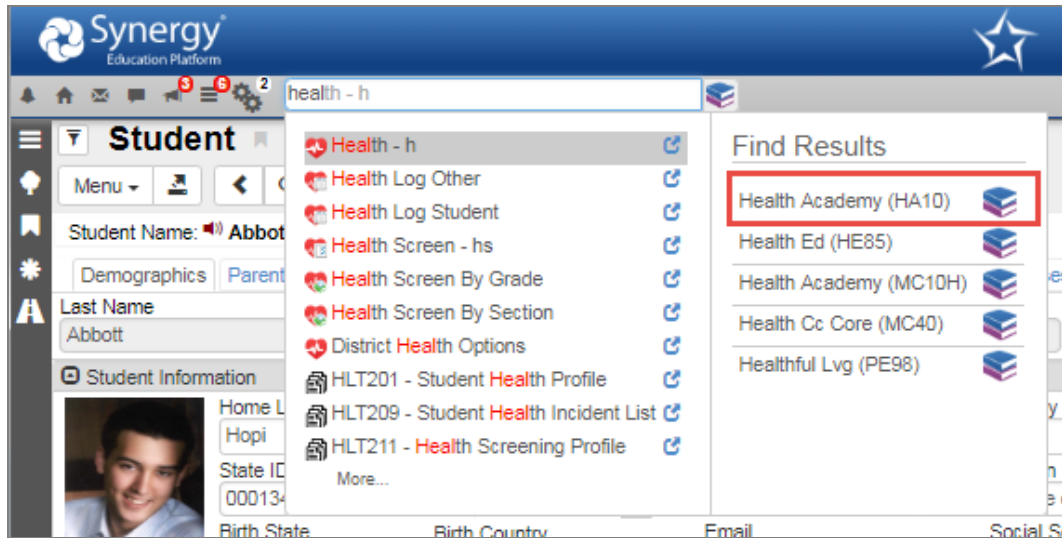
Quick Launch Entities

Using Staff Entity Type

1. Hover over Quick Launch and select 👥 .

2. Enter the **Last Name** or the **First Name** until records display under Find Results.

3. Select the staff name to load the staff in the current staff screen, or select an icon to open the staff record in that screen.
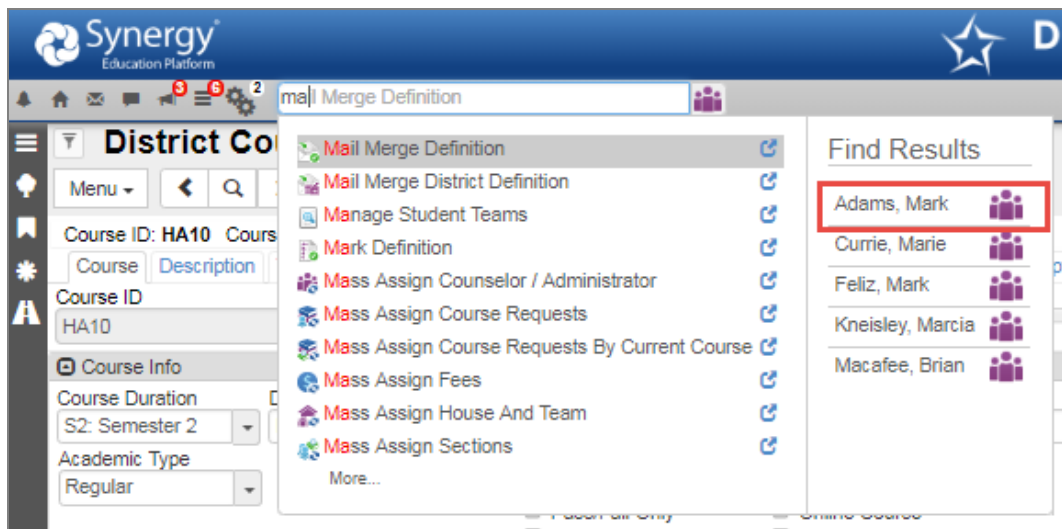
Quick Launch Entities

Using Parent Entity Type

1. Hover over Quick Launch and select .

2. Enter the **Last Name** or **First Name** until records display under Find Results.

3. Select the parent name to open the Parent screen, or select an icon to open the parent record in that screen.
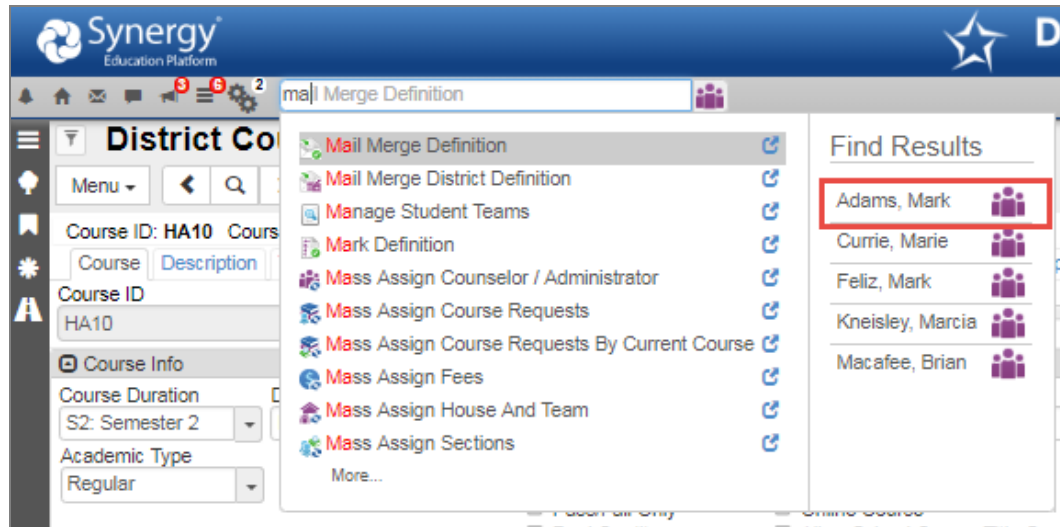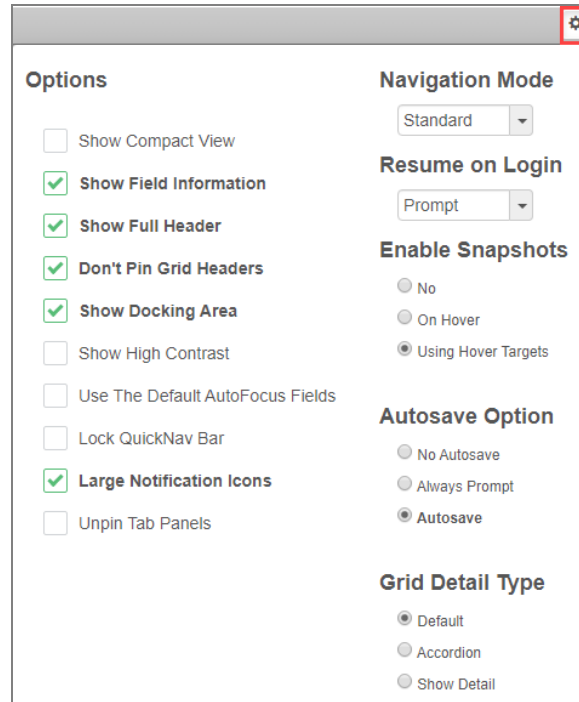
Quick Launch Entities

Synergy Options

The Synergy Options menu provides a quick way to customize screen options and user options.

- Hover over the gear icon to view the options.
- Click the option to select or deselect it.

Synergy Options

Options

Show Compact View

The **Show Compact View** option provides the ability to activate a visual mode that eliminates some of the empty space on the screen, allowing more content to display. Users accessing the system with smaller screens can select this mode to fit as much information as possible on the screen.

> To maximize the space for data entry, select **Show Compact View**, do not select **Show Full Header**, and do not pin the side navigation.

Show Field Information

If your system administrator enabled **Show BO On Mouseover** and **Show Field Information** option is selected, hovering over a field identifies the corresponding business object information. Enabling this option can also grant you quick access to the related lookup table, depending on your security settings. This is particularly helpful when creating queries.
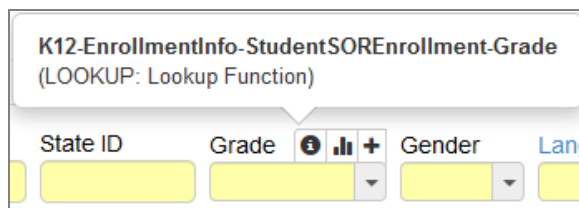
Show BO On Mouseover Example

Show Full Header

Deselecting the **Show Full Header** option removes the gray bar from the Title Bar and condenses it into one blue bar to provide additional room for the Content Area.

Synergy Title Bar - Show Full Header

Synergy Title Bar - Show Full Header Deselected

Don't Pin Grid Headers

Selecting **Don't Pin Grid Headers** prevents the header row of a grid from always remaining at the top when scrolling through large grids.

Show Docking Area

The **Show Docking Area** option allows you to display or hide the docking panel that displays on the bottom of Synergy SIS screens.

Student Screen, Docking Panel

You can add fields to the Docking Panel area at the bottom of Synergy SIS screens. You can easily view frequently used information across all screens and tabs associated with students, staff, or sections. It also supports the configuration of multiple panels based on the screen you are viewing.

> You cannot dock grid elements.
>
> You cannot dock fields that use a link to find and select information, such as the **Course ID** and **Course Title** fields at **Synergy SIS > Schedule > Section**.
>
> Properties that have a *One to Many* relationship cannot share panels. For example, courses can have multiple sections but a section can only have one course associated with it. Therefore, you cannot display the Course and Section properties in the same panel.
>
> Docking Panels are restricted to the users who created them.

Managing Docking Panels

1. Click the arrow on the bottom left of the screen.
2. Click **Add New Panel**.

Docking Panel

3. Hold the **Ctrl** key to click and drag the required fields to the panel. This outlines the fields in orange.

    *   Click and drag the fields within the panel to change their order.
    *   Click the **X** in the field to remove it from the panel.

> You can also click in the field or on the field name and hold until the field is outlined, then drag it to the panel.

Docking Panel

4. Select a different docking panel by clicking the arrow on the bottom left of the screen and choosing the panel to view.
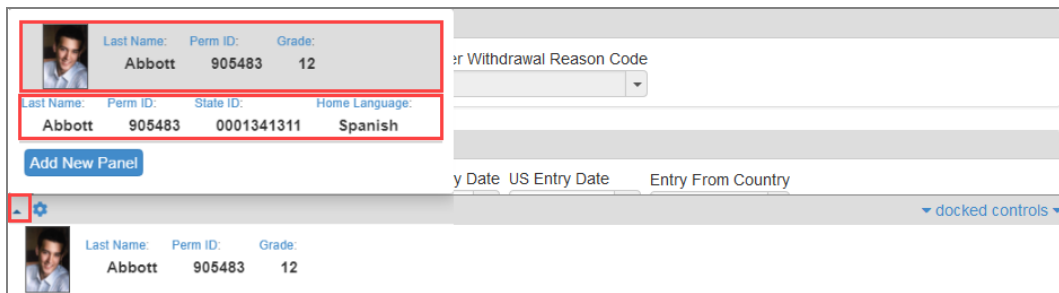
Docking Panel

5. Click the **X** on the far right of a docking panel to delete it.
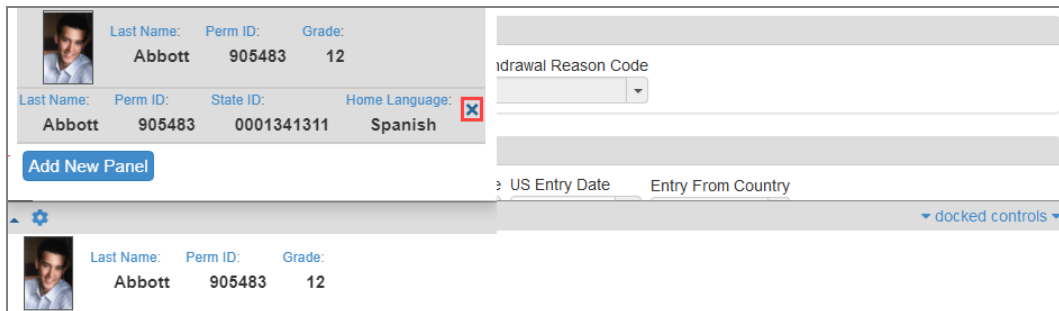
Docking Panel

6. Click **docked controls** in the bottom right to show or hide a panel.

Docking Panel

Docking Panel Options

Click the gear icon in the bottom left of the panel to select display options and styles.
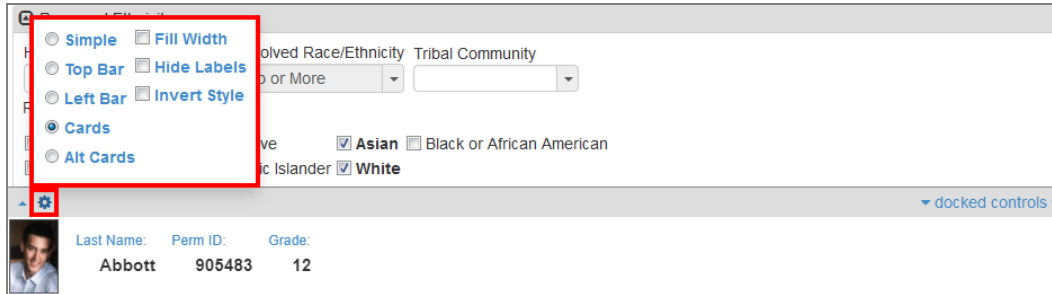
Docking Panel

- **Simple** – Displays the field labels as links. Click the field label to open the field source in a separate window with the source field highlighted in yellow.

Data Docking, Simple

For example, click the **Last Name** link to open the Student screen in a separate window. The **Last Name** field highlights in yellow.
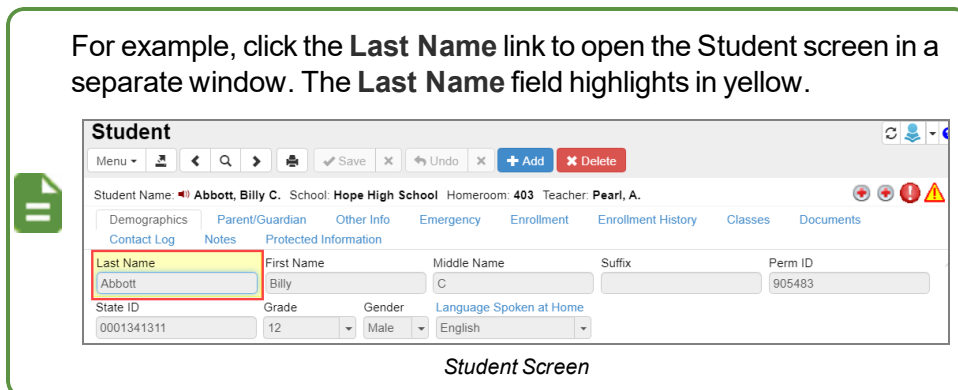
Student Screen

- **Top Bar** – A tab displays on the top of the item added to the panel. This can also include the field label name.

Docking Panel, Top Bar

- **Left Bar** – A tab displays to the left of the field added to the panel. This can also include the field label name.

Docking Panel, Left Bar

- **Cards** – Presents field label names and data in a tile format.

Docking Panel, Cards

- **Alt Cards** – Presents the field data in a tile format with the field label names outside the tile

Docking Panel, Alt Cards

- **Fill Width** – Fills the width of the panel with the available selections.
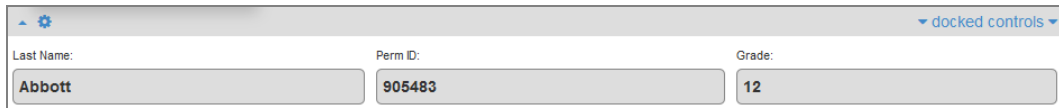
Docking Panel, Fill Width

- **Hide Labels** – Removes the label name from view

Docking Panel, Labels Hidden

- **Invert Style** – Uses the Synergy Header Background color as the Panel Background color and uses the Synergy Background color as the card or tab color
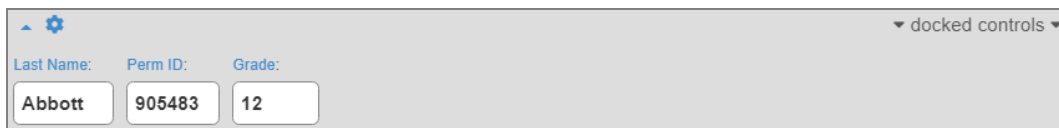
When using High Contrast, disabling **Invert Style** presents the tiles or tabs on a white background, regardless of the color chosen in Synergy Options. This indicates a contrast between the panel and the screen in focus.

Docking Panel, Invert Style, High Contrast

Docking Panel, High Contrast

Show High Contrast

The **Show High Contrast** option provides the ability to activate a visual mode that some might find beneficial for reading text on a computer screen. The data text displays bold to contrast with the label text, which is a shade lighter.

High Contrast settings only display when focused to the current school year. If the focus is set to a previous year or a future year, the screen colors cannot be changed from their default green and brown.

Student Screen, Past School Year Focus

Student Screen, Future School Year Focus

The group box/grid headers can display in color and field information is in bold for easier identification.

Normal Contrast (Top) Vs. High Contrast (Bottom) Example

In High Contrast mode, you can select a color theme to use on Synergy SIS screens. You can also set a Custom theme with any color for the **Background Color** and **Header Background**. The color selection is retained and displays on the next login.
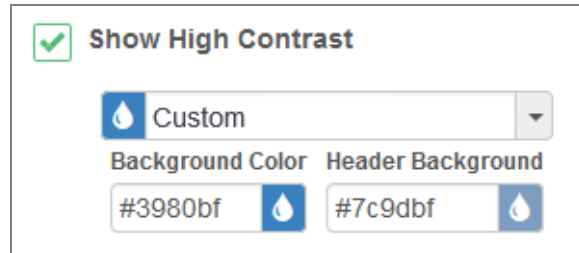
Screen Options Tool

- Select the Theme from the list to change the contrast color.
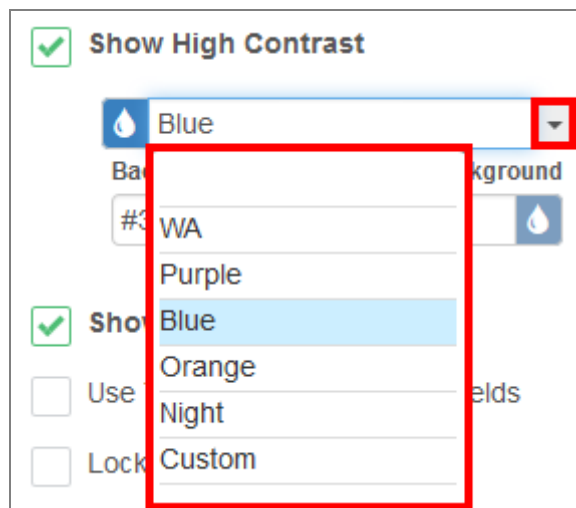
Screen Options Tool High Contrast Color Picker

- Manually adjust the **Background Color** and/or **Header Background** using the mouse to move the circle to select the required color. These colors become the *Custom* theme.
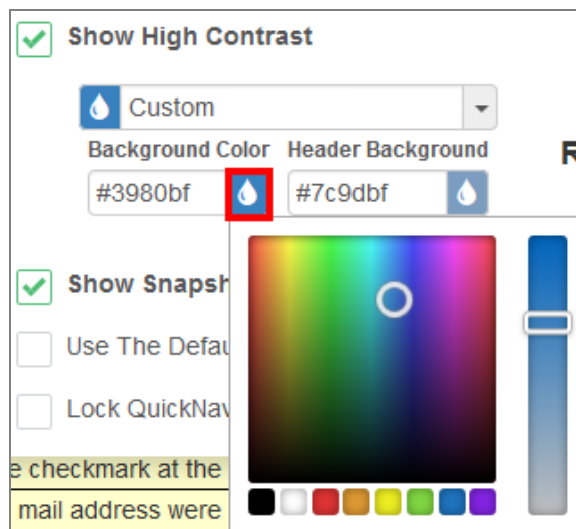
Screen Options Tool Return Default High Contrast Screen

Show Snapshot Views

The Snapshot Views feature in Synergy SIS displays a snapshot of data for Student, Parent, Staff, Section, Course, and School Rooms business objects on mouse-over. Your system administrator must enable and configure snapshot views for them to display. The **Options** menu in Synergy SIS allows you to enable or disable snapshot views once your system administrator has enabled them.

> Closing the Snapshot View by clicking the **X** in the corner resets the cursor position on the screen. If you move the mouse pointer away from the window instead, the cursor position does not change.

Student

You can view the Student Snapshot by hovering over a **Student Name** field or by hovering over the student name title on any student-based screen. The following example uses the Student Accommodations screen.

Student Accommodations Screen

The Student Snapshot provides the following information on the student where available:

- **Last Name** and **First Name**
- **Medical**, **Discipline**, **Special Education**, **Student Programs**, and **Custody** alerts
- **Student Photo** on file
- **Perm ID**, **Grade**, **Email**, **Birth Date**, **Age**, **State ID**, **Ed-Fi ID**, **Home Address**, and **Current Class**

Attendance codes display in the Current Class section if attendance was taken for Daily or Period attendance.

Student Classes Screen

Student Contacts display when the option is set up on the View Change screen.

Student Screen

See the *Synergy SIS Student Management – Administrator Guide* for more information on View Change Setup needed for viewing contacts in student snapshot views.

Parent

You can view the Parent Snapshot by hovering over a **Parent Name** field. The following example uses the **Parent/Guardian** tab onf the Student screen.

The Parent Snapshot provides the following information on the parent:

- **Last Name** and **First Name**
- **Parent Photo** on file
- **Gender**, **PVUE ID**, **Email**, and Addresses

Student Screen, Parent/Guardian Tab

Staff

You can view the Staff Snapshot by hovering over a **Staff Name** field. The following example uses the Class Daily Attendance screen.

The Staff Snapshot provides the following information on the staff member:

- **Staff Name**
- **Email** and **Badge Number**, and **Gender**
- **Staff Role**

Class Daily Attendance Screen

Section

You can view the Section Snapshot by hovering over a **Section ID** field. The following example uses the Class Daily Attendance screen.

The Section Snapshot provides the following information on the section:

- **Course Title** and **Teacher** name
- **Room** number, **Period**, and **Term Code**
- **Total Female** and **Total Male** students
- **Open Seats**

Class Daily Attendance Screen

Course

You can view the Course Snapshot by hovering over a **Course ID** or **Course Title**. The following example uses the Class Daily Attendance screen.

The Course Snapshot provides the following information on the course:

- **Course Title** and **Department**
- **Course Duration**, **Credit**, **Grade Range**, **College Prep**, and **Academic Type**
- short **Description**

Class Daily Attendance Screen

School Room

You can view the School Room Snapshot by hovering over the **Room Name**. The following example uses the Class Daily Attendance screen.

The School Room Snapshot provides the following information on the school room:

- **Class Size**
- **Department**
- **Room Type**
- **School Year**
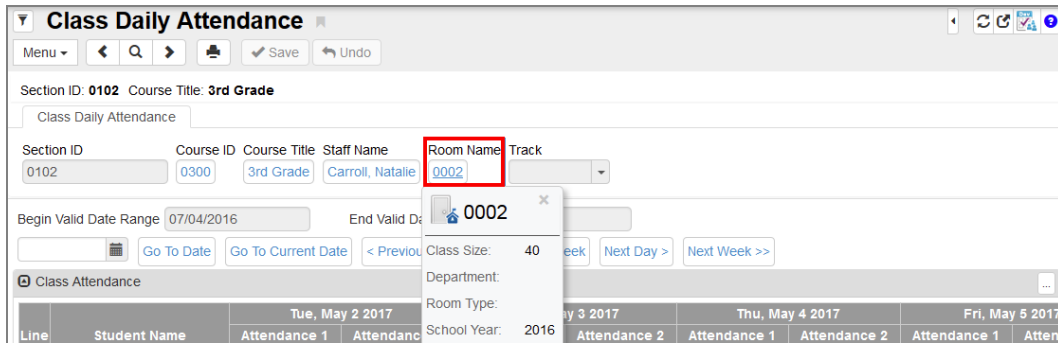
Class Daily Attendance Screen

Use The Default AutoFocus Fields

Auto focus allows administrators to configure the system to automatically place the cursor in a specific field when viewing in Find mode on a screen. For example, the Student screen can have the auto focus field to be the **Perm ID** field if this is the primary field used in student searches. Select **Use The Default AutoFocus Fields** to disable this feature and focus to the default field in Find mode, which is typically the first field on a screen.

Lock Quick Nav Bar

Selecting **Lock Quick Nav Bar** displays a lock sign when attempting to remove the icon from the Quick Nav Bar.
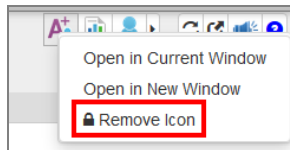
Edit QuickNav Bar

Clicking **Remove Icon** displays a message that states you must clear the option to remove the icon from the QuickNav Bar.
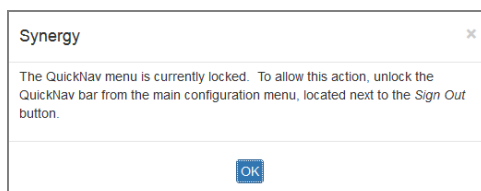
System Message

Large Notification Icons

Student notifications alert staff about specific student circumstances. The student notification icons display on any screen where the student is in focus.
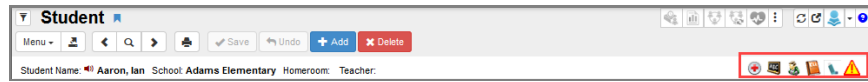
Student Screen

Selecting **Large Notification Icons** increases the size of the notification icons that display on any student-based screen.
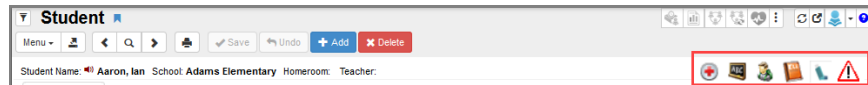
Student Screen

Unpin Tab Panels

You can unpin tab panels using the **Unpin Tab Panel** option in the Synergy Options menu or by clicking the icon on an individual tab panel. Both options allow you to set preferences for all tab panels.

Selecting **Unpin Tab Panels** allows the panels to move up and down with the page when you scroll.
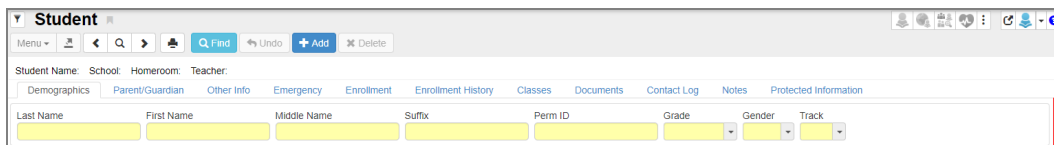
Student Screen

Deselecting **Unpin Tab Panels** keeps the panels stationary while the rest of the page scrolls up and down.
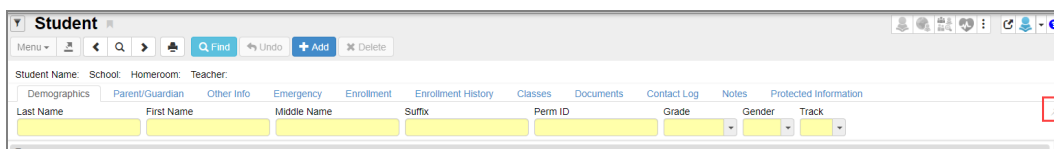
Student Screen

You can use the icon on any tab panel to toggle the **Unpin Tab Panels** option on or off. Clicking the icon toggles the option off if **Unpin Tab Panel** is selected. Clicking the icon toggles the option on if **Unpin Tab Panel** is deselected.
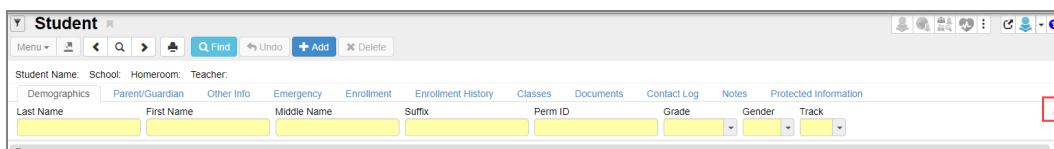
Student Screen

Navigation Mode

- *Standard* – The default appearance of Synergy
- *Accessible* – This option changes the interface for compatibility with screen reader programs, such as JAWS. Navigation options display at the top of the screen and there are no sidebar elements. See Synergy Accessibility for more information.

> You can also enable Accessible Mode as the navigation type by using the keyboard shortcut Tab + Tab + Enter. A confirmation window displays to confirm the change.
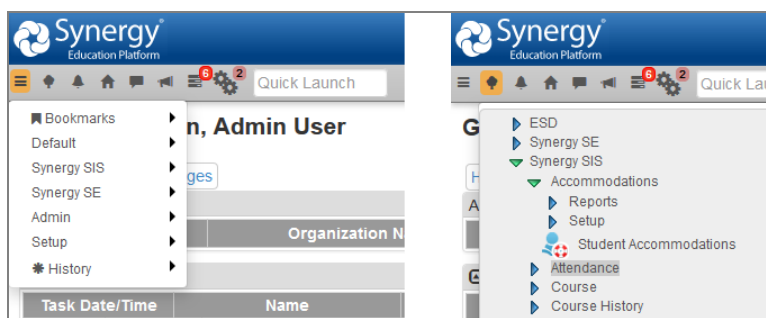
Accessible Mode
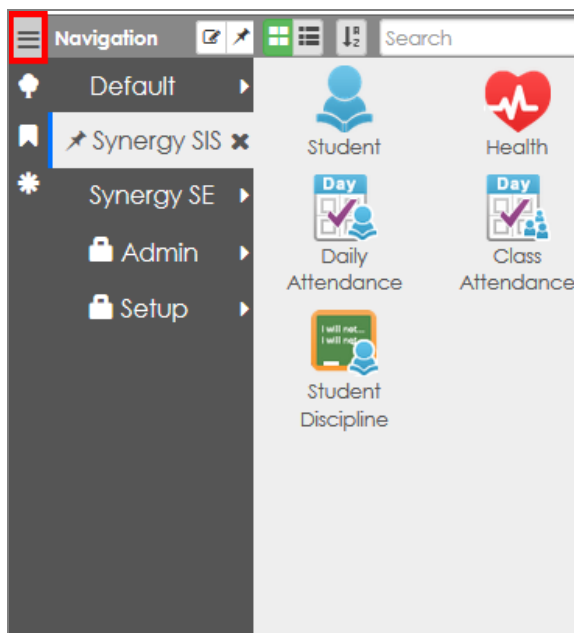
Standard Example

Resume on Login

The **Resume on Login** feature allows you to return to the last screen and tab you visited prior to logging out. You can select one of the following options to dictate what happens when you log in:

- *Never* – Opens the Synergy SIS Home page or the screen specified as your home page.
- *Prompt* – Displays a prompt asking if you want to return to the screen and tab you previously visited. Click the link to navigate to the screen. Select **Don't remind me next time** to change this setting to *Never*.
    - Scroll up or down using the arrows to view your navigation history screens.
    - Use to open a screen in a detached window.
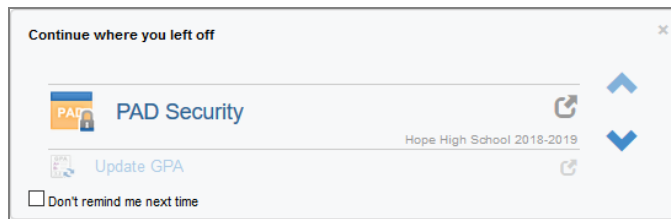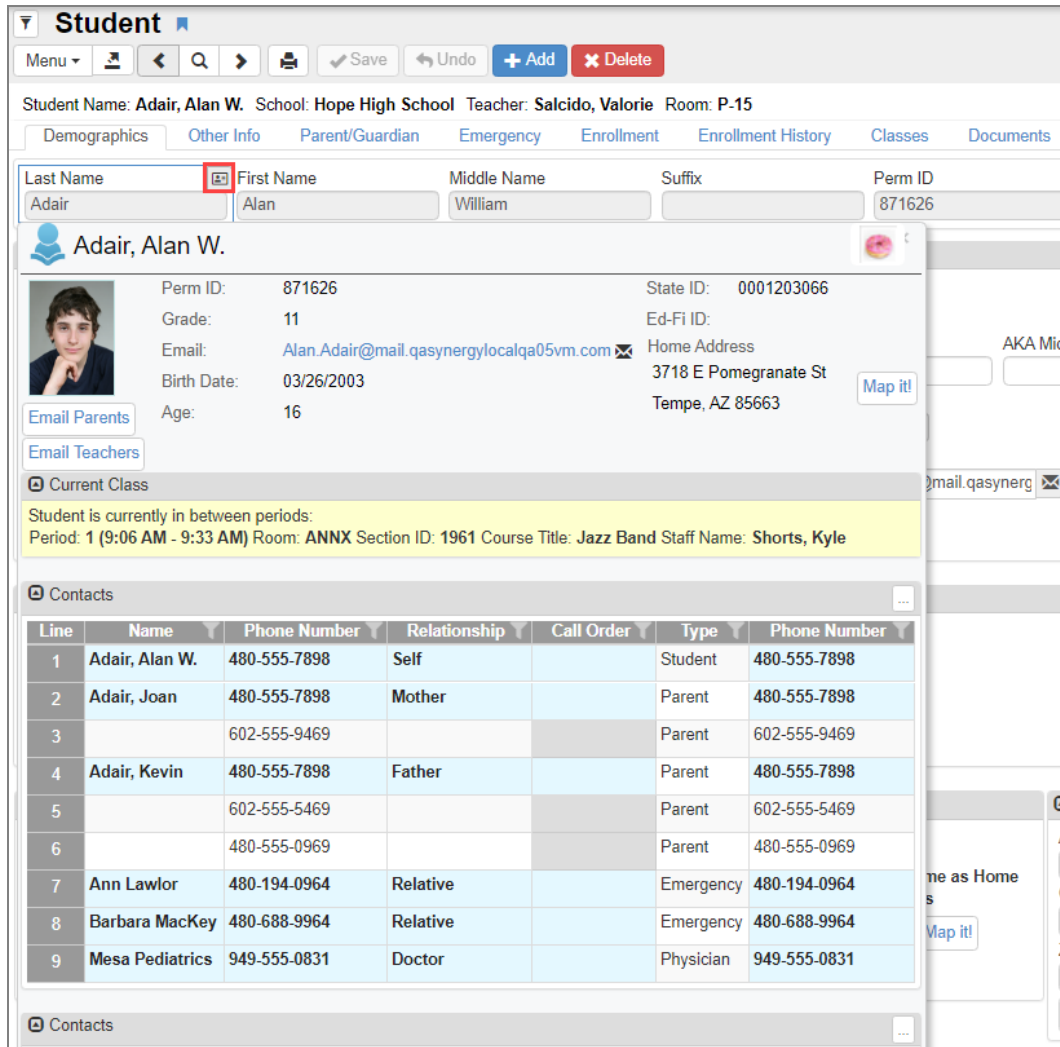
Resume On Login Prompt

- *Always* – Automatically returns you to the screen you previously visited

Enable Snapshots

The **Enable Snapshot** feature displays the snapshot view when you hover over the target icon (🖼) in a field.

- *No* – Disables the snapshot view
- *On Hover* – Displays the snapshot view upon hovering
- *Using Hover Targets* – Displays the snapshot view only when you hover over the 🖼 icon in a field

Student Screen (Snapshot View)

Autosave Option

The **Autosave Option** feature saves data when navigating to different tabs or screens.

- *No Autosave* – This is the default option. Synergy SIS generates a warning message when attempting to move to another tab or screen without saving changes. You must manually save all information.
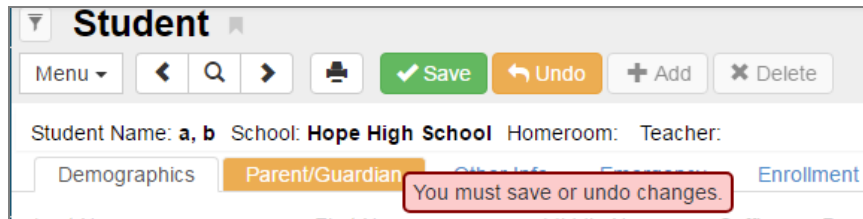
Student Screen

- *Always Prompt* – Synergy SIS generates a message that prompts you to save pending changes when moving to a different tab or screen. You can click **Save and Continue**, **Undo and Continue**, or **Cancel**. Selecting any of the continue options opens the previously selected screen.
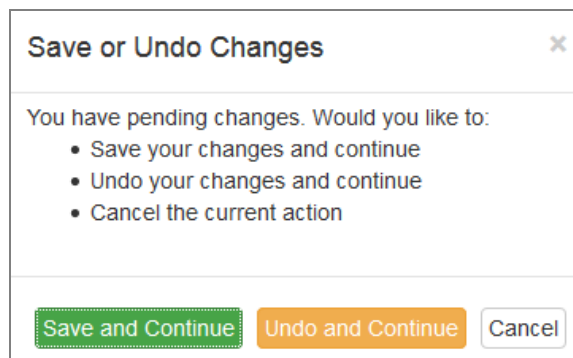
Save Or Undo Changes Screen

- *Autosave* – Synergy automatically saves the data entered before opening the requested tab or screen. You do not need to manually click **Save** after entering information.

Grid Detail Type

The **Grid Detail Type** feature allows a user to set their personal preference for grid detail.

> The user setting overrides the district setting.
>
> Some grids, for example, the Violations grid on the Incidents 2019 screen, are hard-coded to use a particular Grid Detail Type. Those grids are not affected by the Grid Detail Type option.

> See the *Synergy SIS – System Administration Guide* for more information on setting the **Grid Detail Type** option for administrators.

- *Default* – Uses the option selected on the **Options** tab of the System Configuration screen
- *Accordion* – Displays ▶ next to the **Line** number for each line in the grid. Click ▶ to toggle the line details open or close.
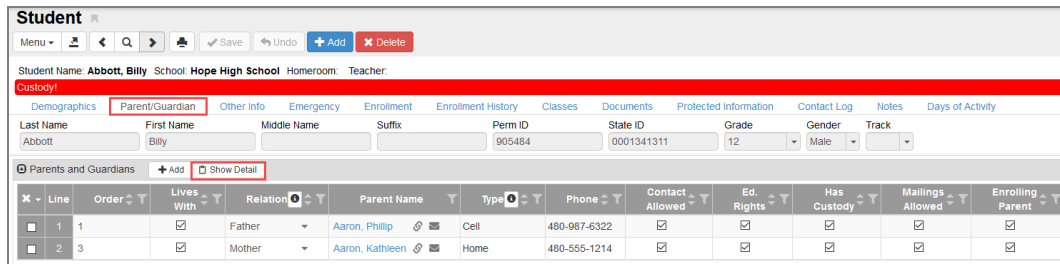
> The grids do not display the **Show Detail** button.

- *Show Detail* – Displays the **Show Detail** button

Example

The example screenshots below display the Parents and Guardians grid on the Parent/Guardian tab of the Student screen in two different ways.
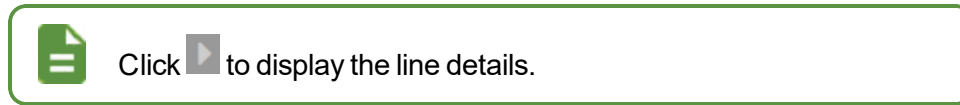
- With the Blank or *Show Detail* option selected

Student Screen, Parent/Guardian Tab

- With the *Accordion* option selected

Click ▶ to display the line details.

Student Screen, Parent/Guardian Tab

Lock

This locks the Synergy SIS screen. You must re-enter the password to access the screen, similar to the screen lock in Windows. This is helpful when the user needs to leave their desk momentarily and do not want to lose their work, but the information needs to remain secured.
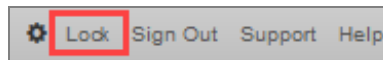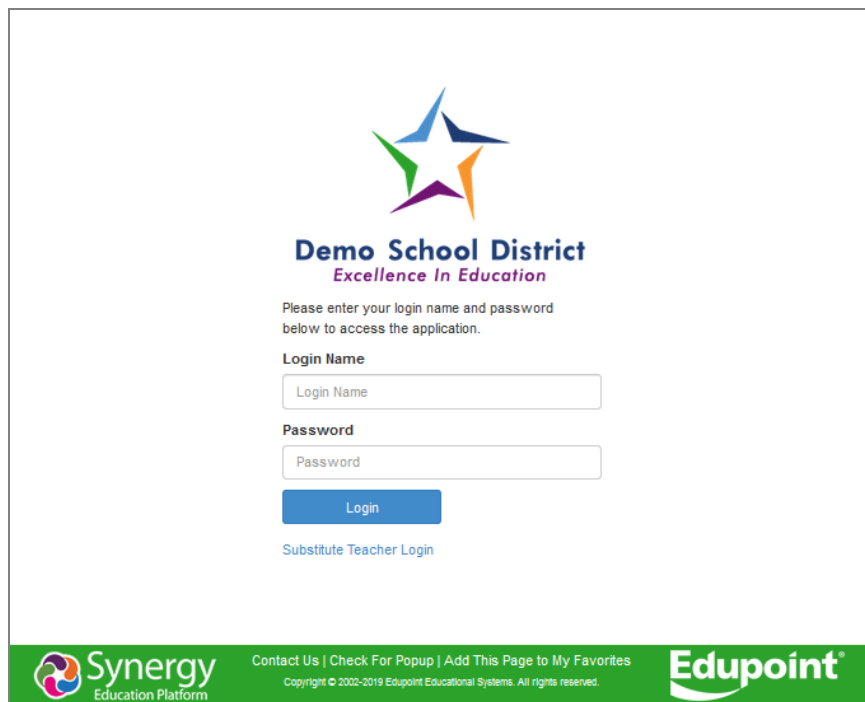

Lock Icon

Lock Screen

Sign Out

Click this link to log out of Synergy SIS and return to the Login page.
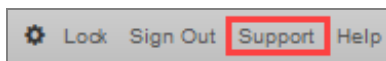

Sign Out Icon

Sign Out Screen

Support
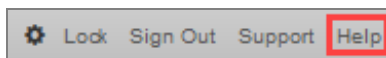
This links to a page with information about how to receive support for the Synergy SIS system. Each district can customize this page.

Support Icon

Help

This links to the online help system that opens a list of Synergy SIS help guides in a new screen. The online help is a separate installation managed by your system administrator.


Help Icon

Navigation Options

There are several options for navigating within Synergy SIS. The Primary Navigation (Navigation), Product Access Definition (PAD) Tree, Bookmarks, and History menus are accessed from the side panel of the Synergy SIS screen. The Navigation Panels are accessed from the side of any Synergy screen. When viewing, each panel may be left as a *hover over* display – 🖈 , or *pinned* so that the content is always displayed – 📌 .
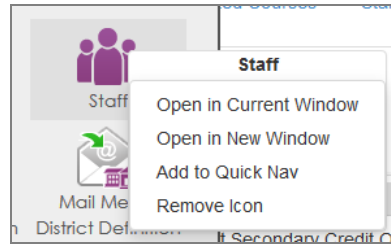
Navigation

You can use the Navigation toolbars to store frequently used screens and reports. You can create multiple toolbars to organize the screens and reports into related groups. The system administrator can create toolbar groups and users can create their own groups. Users cannot change groups created by the system administrator, which are indicated with a **Lock** icon following the group name. Whether using the *Accessible* or *Standard* mode, the navigation is the same; however, the Standard mode provides additional sorting and filtering.
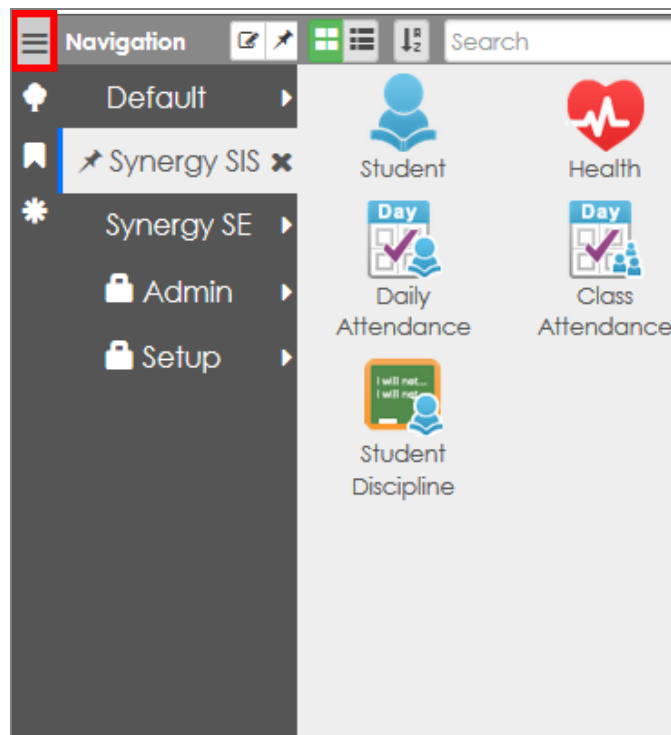

Standard (Left) Navigation Menu Example

- Click the icon to access a screen or report from a toolbar.

Synergy Navigation Menu – Standard Mode

- Right-click the icon to view additional options. You can open the screen in the current window or a new "detached" window. From here, you can add it to your Quick Nav bar. You can also remove it from the toolbar altogether, unless there is a lock next to the toolbar name. In that case, you cannot remove the icon.
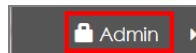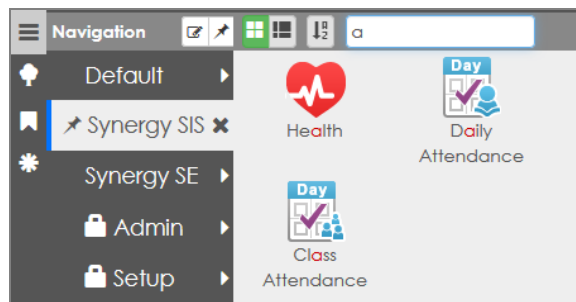

Synergy Navigation Menu, Standard Mode

- If multiple toolbars exist, inactive toolbars are listed by their group name at either the bottom or top of the active toolbar group.

- Select the name of the toolbar to switch between toolbar groups.

- In *Standard* mode, at the top of the group, there are additional options to sort and filter.
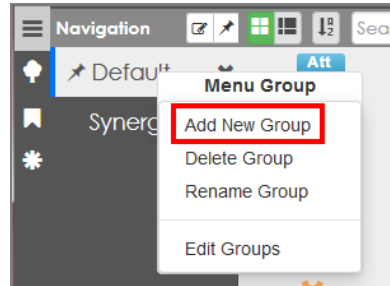

Synergy Navigation Panel, Standard Mode

- Click ⊞ to view the group by icons.

- Click ▤ to view the group by list.

- Click ⬇ to sort the group A-Z.

- Start typing the name of a screen in the **Search** and the system filters down the list.

Synergy Navigation Menu – Standard Mode

Creating Custom Toolbar Groups

1. Right-click on a group name and a drop-down menu opens.
2. Select *Add New Group*.

Synergy Navigation Menu – Standard Mode

3. Enter a name for the new group in the field that displays.
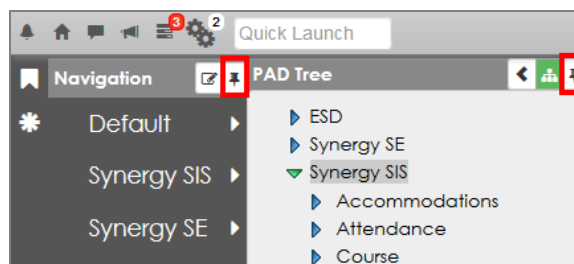4. Click **Save**.

> Newly added groups are automatically named **Default**.
>
> You can rename toolbar groups by right-clicking on the group name, selecting **Rename Group**, and entering the name.
>
> You can delete the toolbar group by right-clicking on the group name and selecting **Delete Group**.
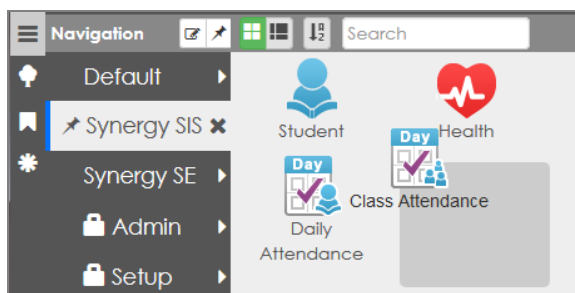
Adding Icons to a Group in Standard Mode

1. Pin both the **Navigation** and **PAD Tree** panels open.

Synergy Navigation And PAD Tree Menus – Standard Mode

2. Locate the screen to add in the PAD Tree.

3. Click the name of the screen and drag it to the group title. This opens up the group box on the right.

4. Drop it into the group box.

Synergy Navigation Menu – Standard Mode

5. Repeat with other reports or screens to add to the group. You can rearrange the icons in the group by dragging them to the required position.

> Right-click on the icon and click **Remove Icon** to delete icons from a group.

Adding Individual Icons to a Group

1. Locate the screen or report to add in the PAD Tree.

2. Right-click on the title or icon and choose *Add to Group …* from the menu.
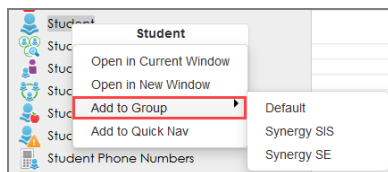
Synergy PAD Tree Menu

3. Select the appropriate group.

Quick Nav

Similar to the Navigation panel, the Quick Nav bar is a great place for frequently accessed screens. It is more helpful as you become familiar with the icons for the different screens.

One of the advantages of using the Quick Nav bar is that the activated screens detach, or open in a new window. This means that you can have several screens open at the same time. The detached screens can even be the same screen but with different records open at the same time.

> This feature only works from student-based screens, such as Student Incident, Health, and Daily Attendance when focused to the district level. Using the Find or Scroll options displays students that attend the same school as the student in focus on the main screen.

1. Right-click on the screen name or icon to add a link to the Quick Nav bar from the PAD Tree menu or the Navigation menu.
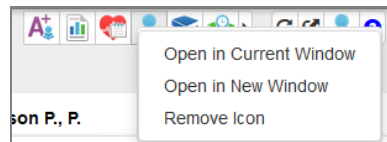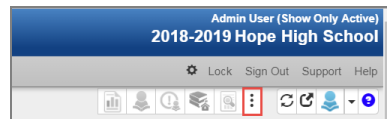
2. Select *Add to Quick Nav*.
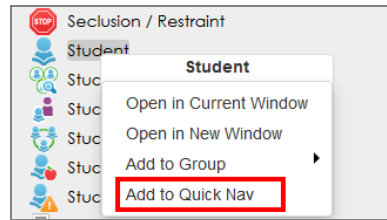
Synergy PAD Tree

3. Right-click on the screen name or icon and additional options display.

- *Open in Current Window* – Opens the screen in the Content Area
- *Open in New Window* – Opens the screen in a new detached window
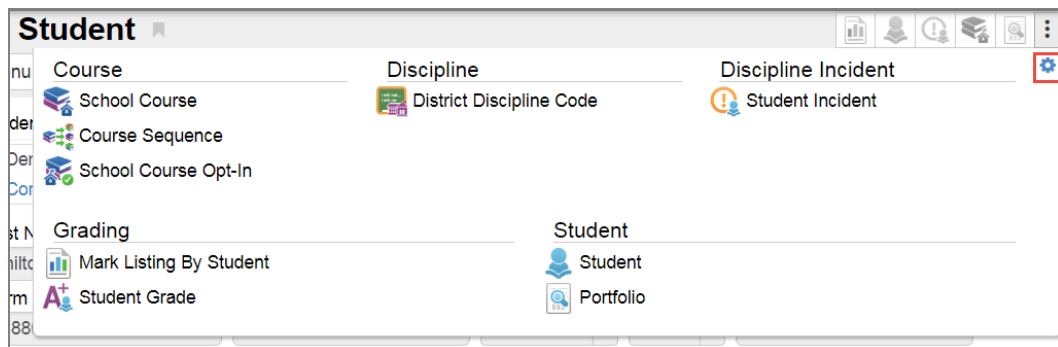- *Remove Icon* – Removes the link from the Quick Nav bar

Synergy Quick Nav Bar

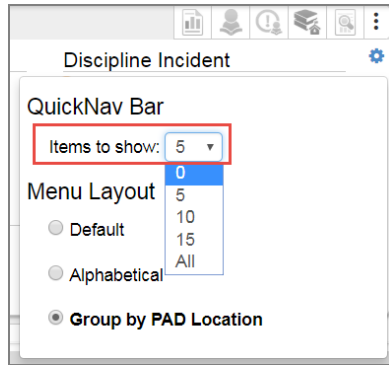4. Click ⋮ to determine how icons display in the Quick Nav bar.

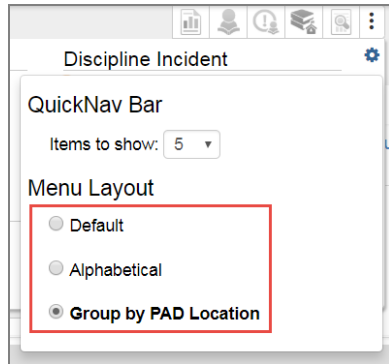*Synergy Quick Nav Bar*

5. Click ⚙ to open the Quick Nav panel.

Quick Navigation Panel

6. Select the **Items to show** to limit the number of icons displayed at the top of the screen.

Quick Nav Options Menu

7. Select the **Menu Layout**.

Quick Nav Options Menu

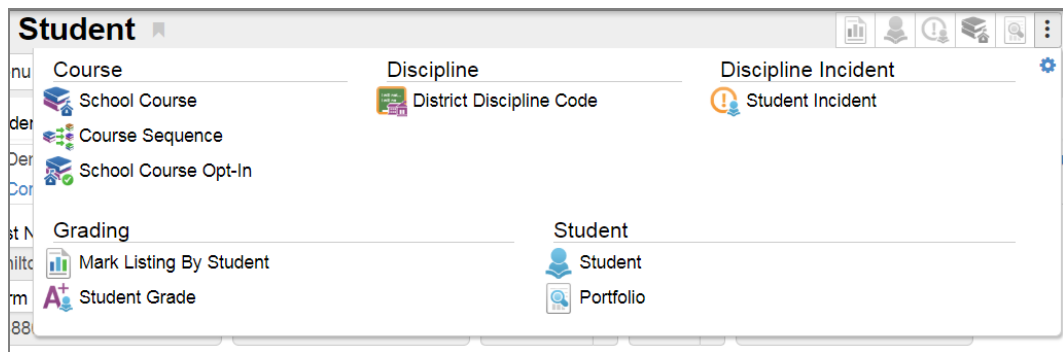-   *Default* – Screen names display in a list
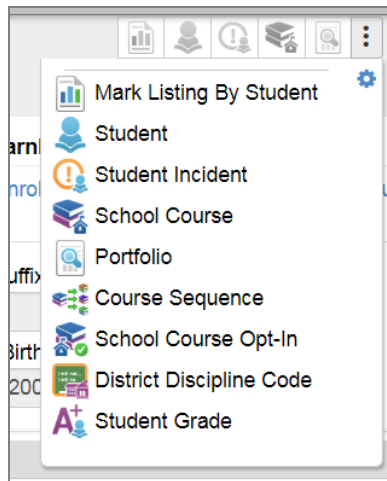
Any Synergy Screen

- *Alphabetical* – Screen names display listed alphabetically
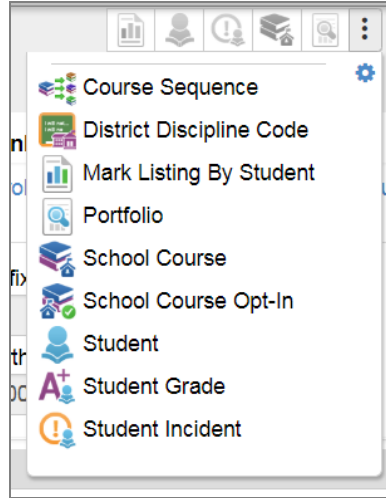
Any Synergy Screen

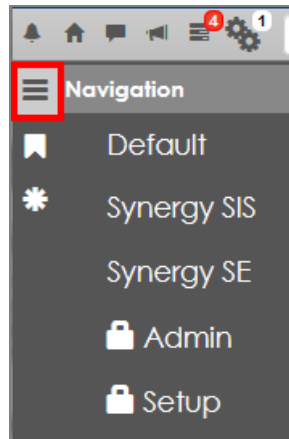- *Group by PAD Location* – Screen names display grouped alphabetically by module

Any Synergy Screen

Enhanced Standard Navigation

Standard navigation offers an enhanced navigation panel that allows users to create custom menu groups. You can organize their most frequently used menu items into groups.

Adding Navigation Groups

1. Click the **Navigation** menu.

Navigation Menu

2. Right-click inside the Navigation area.
3. Select **Add New Group**.
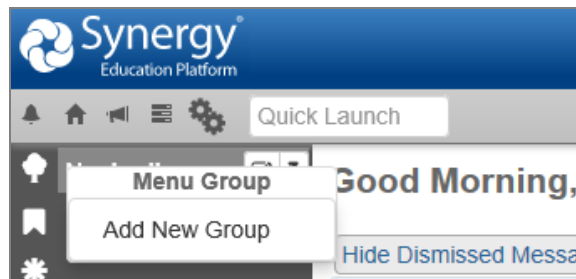
Navigation Menu, Menu Group

4. Enter the name of the group.

> This example uses *Student* and *System*.

5. Press **Enter** or click outside the dialog box to save the group name and close the box.
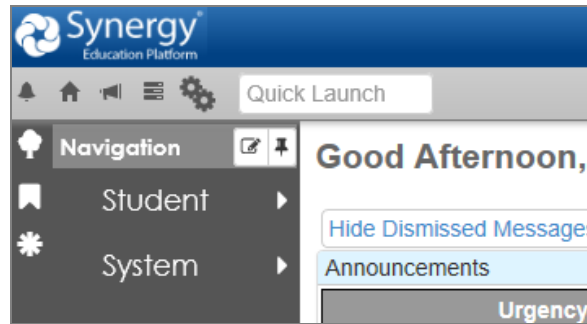
Navigation Menu

Adding Group Items – PAD Tree

Enter group items by using the PAD Tree or by using drag-and-drop.

1. Navigate to **Synergy SIS > Student** in the PAD Tree menu.
2. Right-click on the **Student** module name.
3. Hover over **Add to Group** to view the created groups.
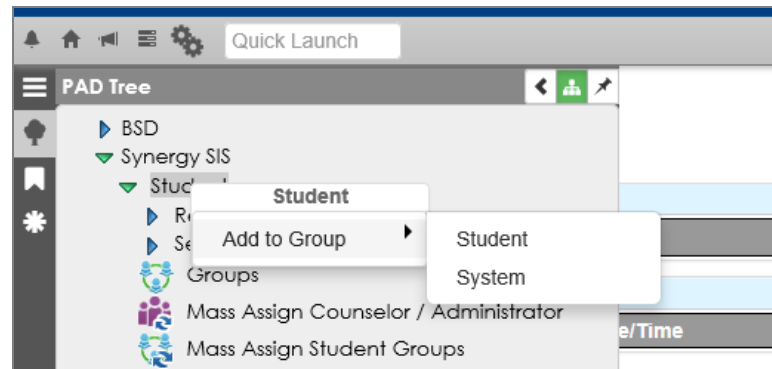
PAD Tree Menu

4. Select the group to add the link to. This example uses *Student*.

5. Open the Navigation Menu and hover over the **Student** group to display the group items.
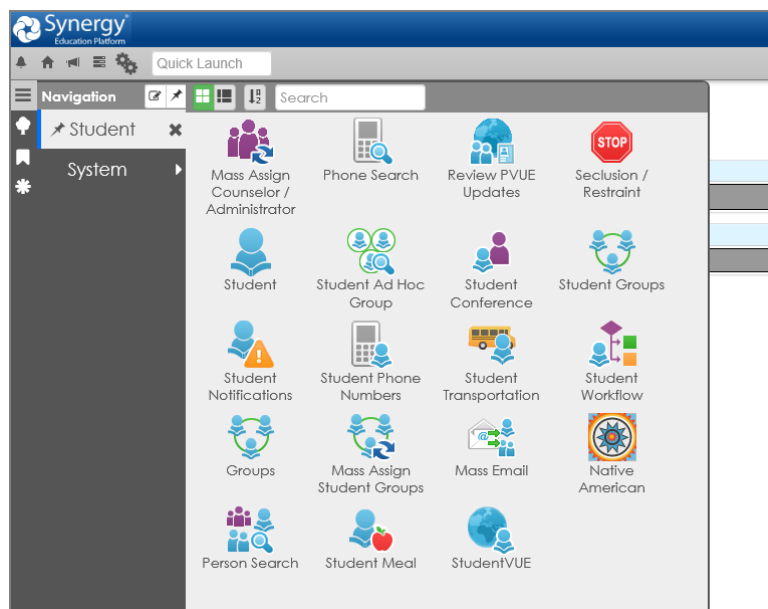
Navigation Menu, Custom Group

Adding Group Items – Drag-and-Drop

1. Navigate to **Synergy SIS > System > Setup** in the PAD Tree menu.
2. Click and hold the **District Setup** link.
3. Drag the link to the Navigation panel and hover over the group to add the link to. This example uses *System*.
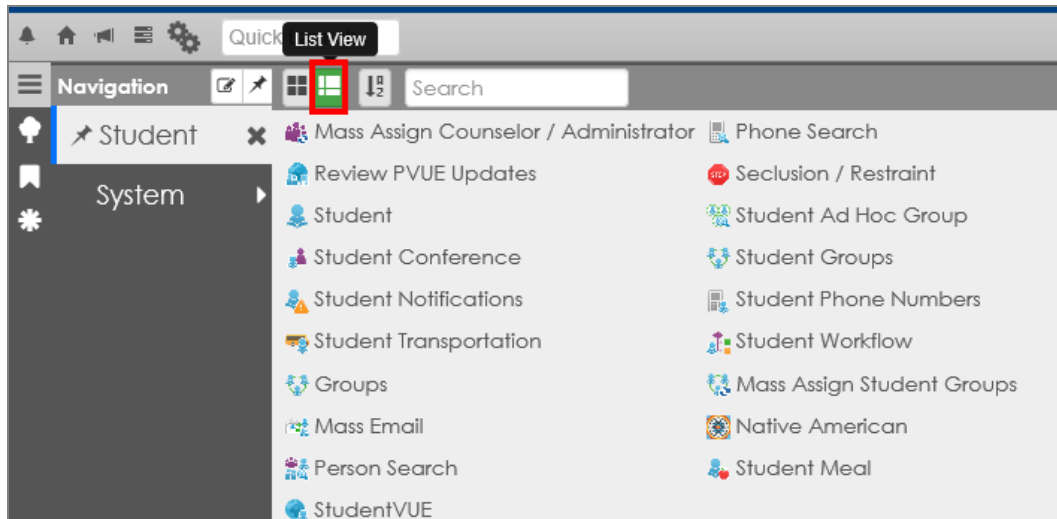4. Drop the icon into the group area. The District Setup icon displays in the menu.
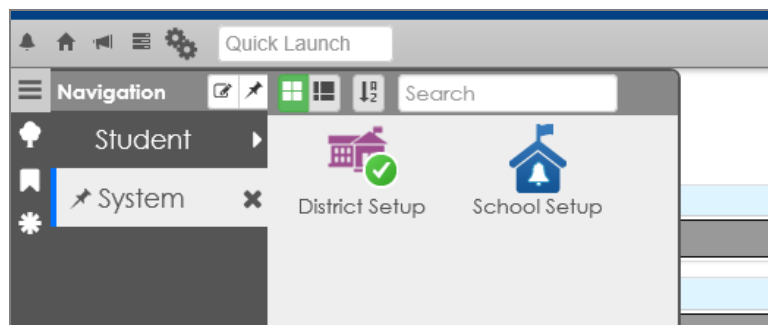
Navigation Menu, Custom Group

Displaying Menu Items

You can display group menu items as icons or as a list and change their layout inside the menu.

1. Click the **Navigation** menu and hover over a group menu.
2. Click the List View icon to change the menu display to a list of items.

Navigation Menu, Custom Group

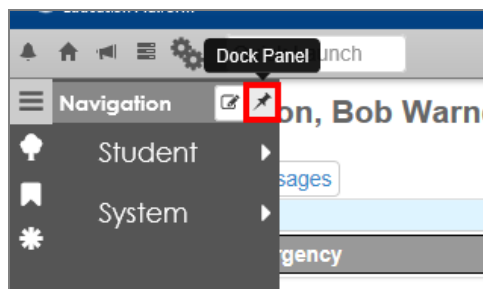3. Click the Alpha Sort icon to sort the menu list items alphabetically.
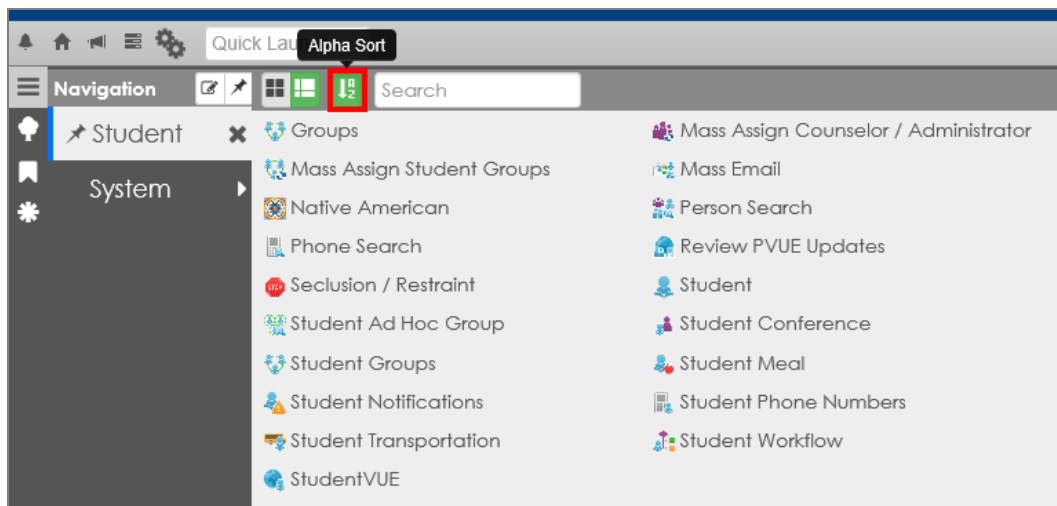
Navigation Menu, Custom Group

4. Click the Icon View icon to switch from List View to Icon View.

Navigation Menu, Custom Group

5. Click the **Navigation** icon and click on the Dock Panel icon to keep the group name window open. Click the icon again to undock the window.

Navigation Menu

6. Click the **X** to the right of the Group name to hide menu items.
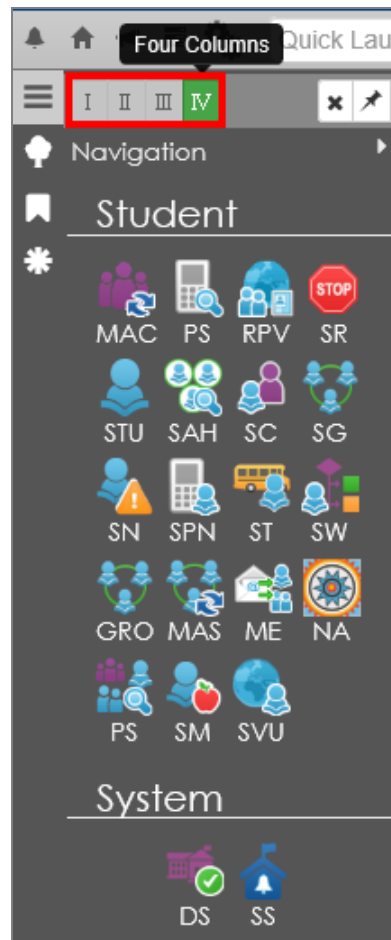
> This does not remove items from the group.
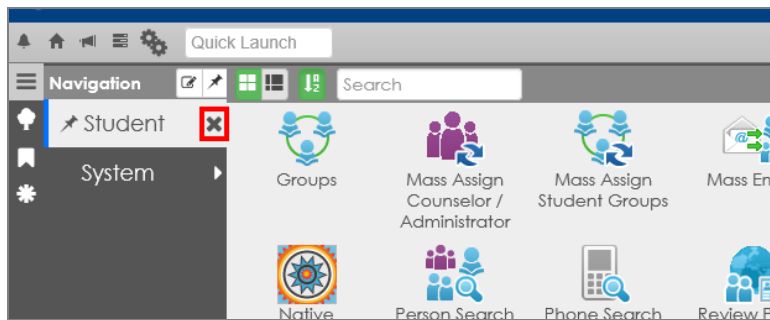
Navigation Menu, Custom Group

7. Click the pin icon next to the custom group name to display menu items below the group name. Icons display with abbreviations of the screen name.
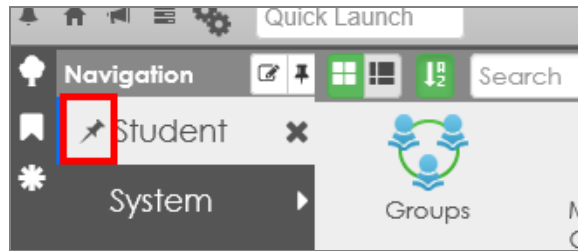
Navigation Menu

8. Click the Column icons to display the menu icons in one, two, three, or four columns.

Navigation Menu, Custom Group

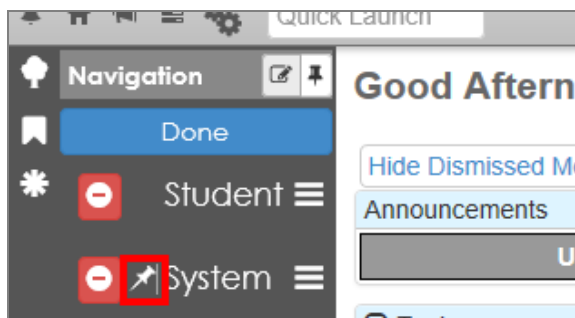9. Click **X** to the left of the Group name to revert the view and open the icons in a separate window.
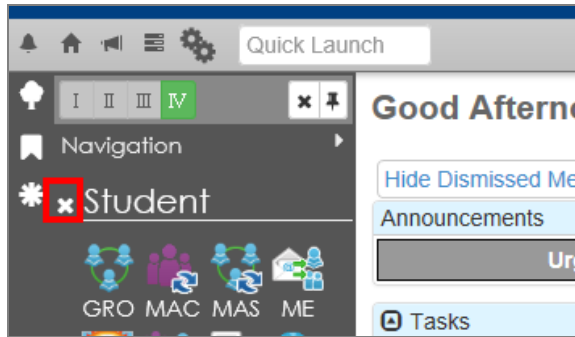
Navigation Menu

10. Hover over the Navigation arrow above the System Group to display all Group names to the right.
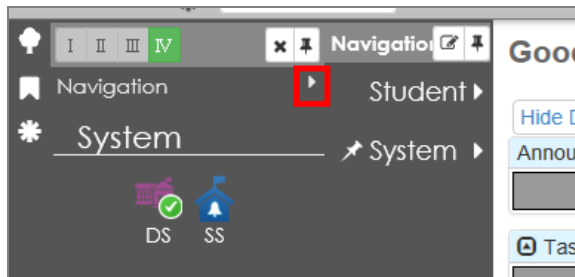
Navigation Menu

11. Hover next to the Group name to view the **Docking** icon.

12. Click the icon to dock that group.

Navigation Menu

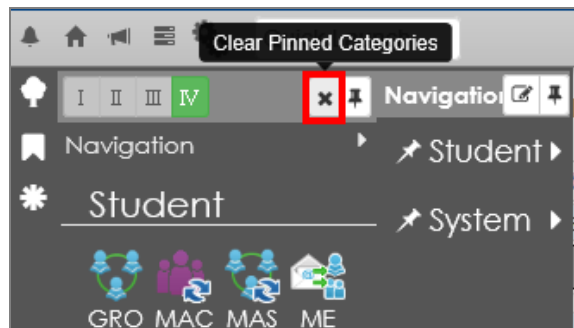13. Right-click on a Group name to open the **Menu Group** options. You can delete or rename the group from here.

> The **Edit Groups** option functions the same way as clicking the Edit Groups icon.
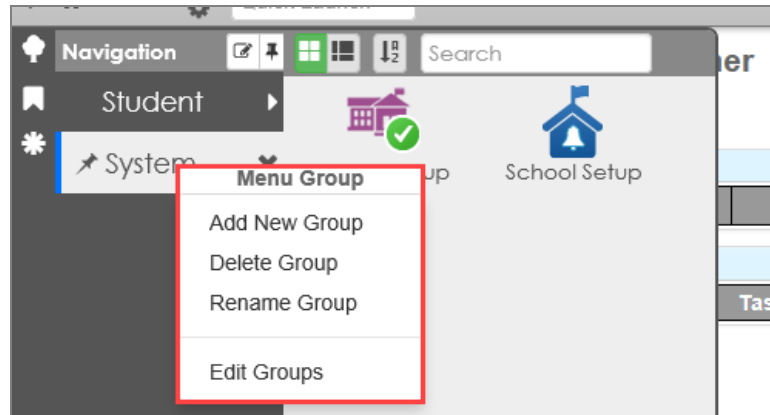
Navigation Menu, Custom Group

14. Click the Clear Pinned Categories icon to clear all docking.

Clear Pinned Categories Icon

Deleting Groups and Menu Items

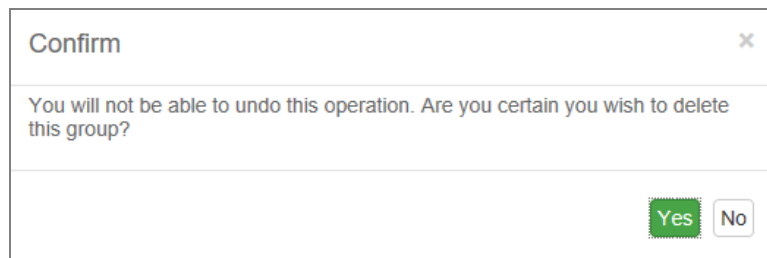1. Click the Edit Groups icon. The Delete Group icon displays next to each group name.

> 💡 Hide the Delete Group icons by clicking the Docking icon next to the group name or clicking **Done**.

2. Click the Delete Group icon.
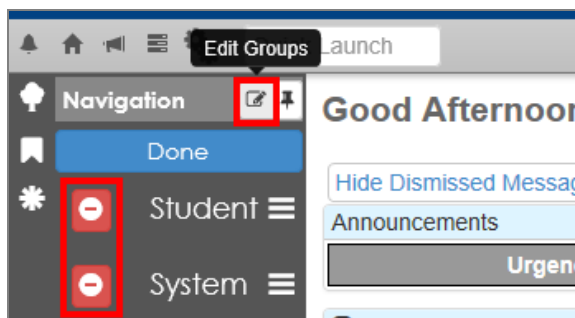
Navigation Menu

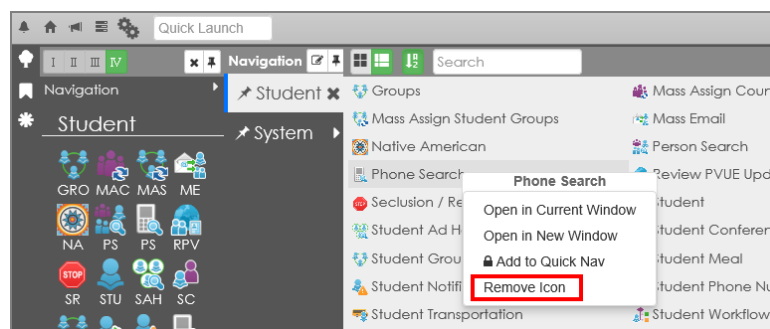3. Click **Yes** on the confirmation message.

Confirm Message

4. Right-click on a menu icon.
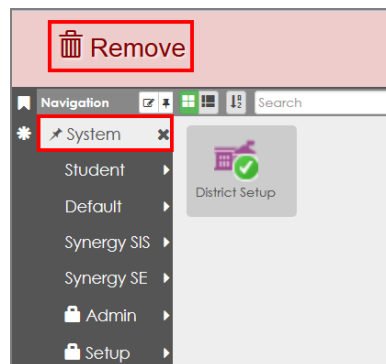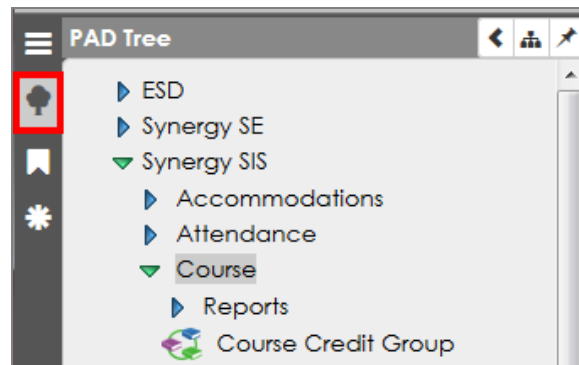
5. Click **Remove Icon**.
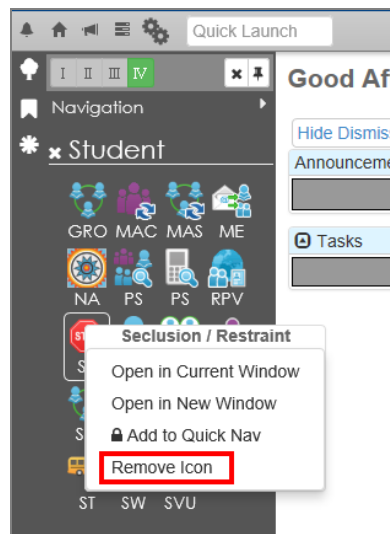
Navigation Menu

Navigation Menu

You can also click and drag an icon to the **Remove** icon to remove it from the group.


Navigation Menu, Custom Group

PAD Tree Menu

Synergy PAD Tree Panel

The PAD Tree lists all screens and/or reports the user has access to.

1. Click the name of the module or the blue triangle next to it to expand the folder and view its contents. Clicking on a triangle turns it green and points it downward.

2. Click the appropriate number of names/triangles until the intended screen or report displays.

3. Click the screen name or icon to show it in the content area.

4. Right-click the screen name or icon and additional options display. This works from both district and school focus.
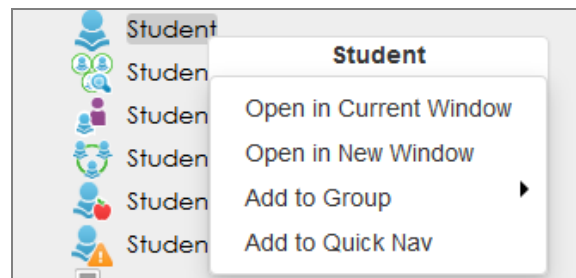
Synergy PAD Tree Panel

- *Open in Current Window* – Opens the screen in the content area
- *Open in New Window* – Opens the screen in a new detached window.
- *Add to Group* – Paces an icon link in the selected Navigation Toolbar group.
- *Add to Quick Nav* – If this option is available, it places an icon link above in the Quick Nav bar.

Additionally, you can click the Only Show the Active Node icon to only show the currently selected tree node rather than all of the nodes.

> 📄 This feature is only available in Standard Navigation mode.

- The Only Show the Active Node icon is green when enabled and shows only the currently selected node in the PAD Tree instead of all the nodes.
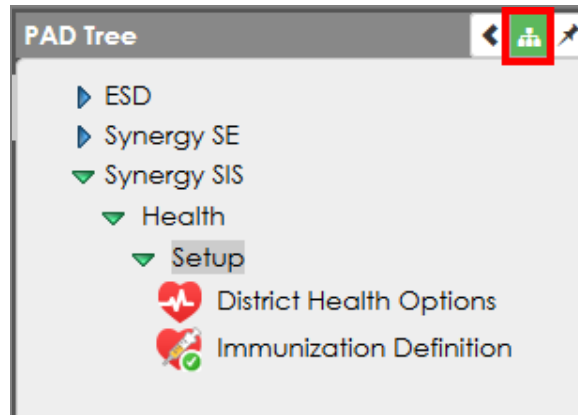

PAD Tree

- The Only Show the Active Node icon is the default color when disabled and shows all nodes in the PAD Tree instead of just the currently selected node.

Bookmarks Menu
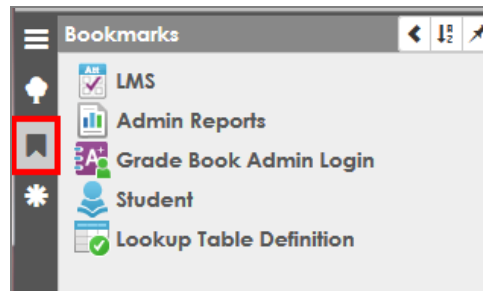
Synergy Bookmarks Panel And Button

Bookmark any frequently used screen, report, or process by clicking the bookmark to the right of the screen title. The bookmark icon turns blue indicating the screen is bookmarked.
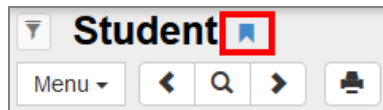
Student Screen

Remove a bookmark by hovering over the screen title and select the blue **X**. Select the detach screen icon to open it in a separate window.
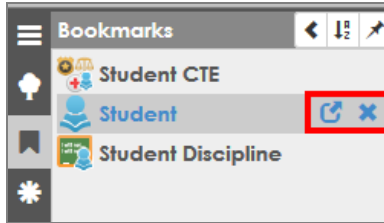
Synergy Bookmarks Panel

History Menu

The History menu stores the latest browsing history. Selecting an entry takes you to the selected screen and student. The date, time, and focus display when hovering over an entry. The screen name displays when hovering over a screen icon.

Click **X** to clear the selection, click **X** at the top of a group to remove all entries from that group, or click **Clear** at the top of the menu to remove all data. A confirmation message displays verifying deletion.
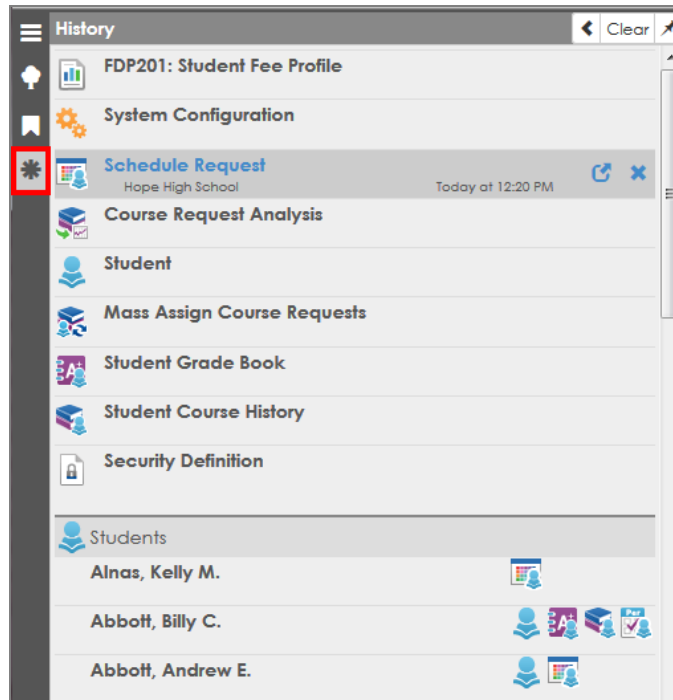
Synergy History Panel

The History Panel stores the following maximum history entries:

- Ten screens
- 15 entity groups (such as students, sections, parents, etc.)
- 15 entities within each group (students, sections, parents, etc.)
- Four screens for each entity

Scrolling through students, parents, users, or staff adds them to the History Panel in the order selected.

A new window opens when selecting a student that is not in the current focus school or school year. The window focuses to the school that the student attends.

If you select a student from the History Panel, the student does not move to the top of the list until you log out and back in.

Clearing Quick Focus History

1. Click the History icon.
2. Click **Clear**.
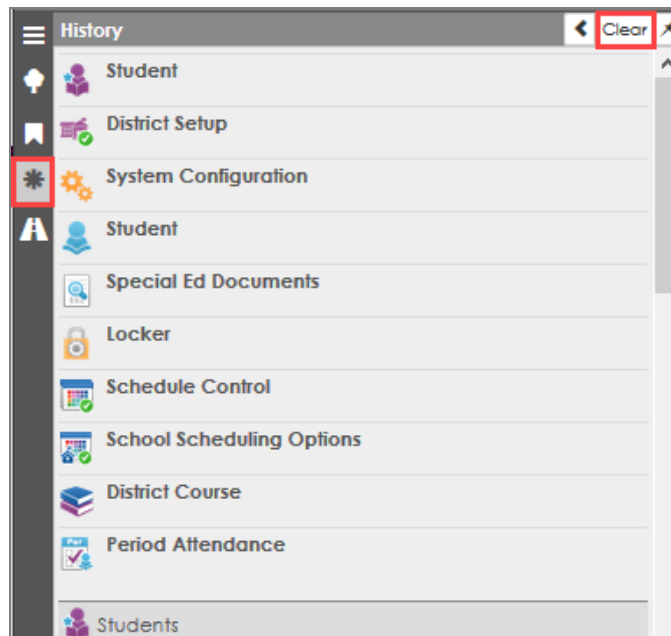
Synergy History Panel

3. Click **Yes** on the confirmation message.

> Clearing the history clears the recent history and the **Focus History**.
>
> The **Focus History** menu does not display on the Title Bar after you clear the history. You can change the focus only from the **Change Focus** menu.

Continue Where You Left Off Menu

The Continue where you left off window displays a maximum of ten recently viewed screens when you log back in to Synergy. You can use the up and down arrows to scroll through the history and open the links in a detached window.

1. Log in to Synergy.

2. Select ![A] on the Navigational panel to display the recent navigation history.

3. Scroll through the screens using the up and down arrows.

4. Click the screen name to open the screen. Click ![icon] to open a screen in a detached window.
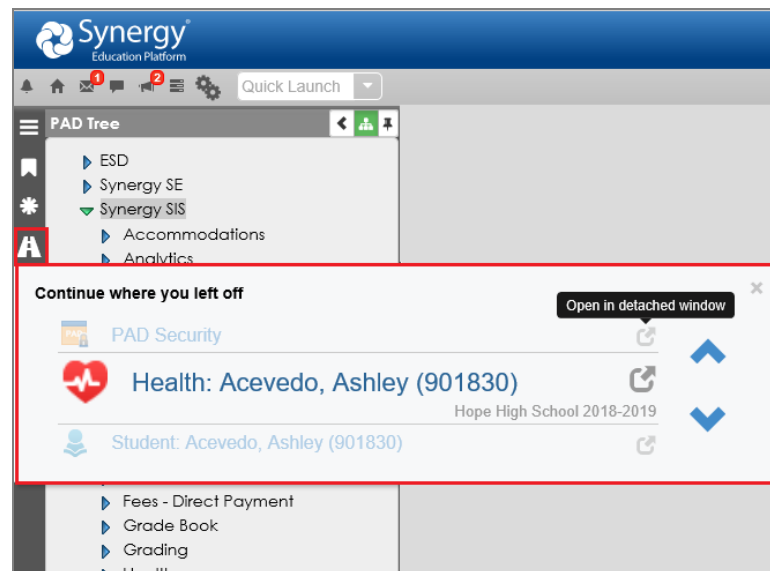
Synergy Navigation Panel

> If you navigated to more than 10 screens, all screens display in the Navigation panel until you refresh or log out and log back in.

Content Area

The content area displays different types of information depending on where you are in the system. When you first log in, this area displays announcements, dashboard widgets, and daily tasks. When you navigate to specific screens, the content area displays the data related to that module.

When the screen is in Find mode, the fields are yellow. Information entered when a field is yellow is used as criteria when searching for records.

Student Screen

The content area displays the available information for the specified entity on the screen, such as a student or staff member. Content areas can display one or more tabs of information. A line of general information about the focused record displays at the top of most content areas.

Student Screen

When the content area is in Edit mode, you can edit fields with a white background. You cannot edit fields with a gray background.

Student Screen

When adding a record, you must complete fields that have a green background before clicking **Save**.

Student Add Screen

Group Boxes

Multiple group boxes can display on a screen to separate data. Different screen elements that can be contained within group boxes include:

- action button
- check/uncheck all
- checkbox
- date
- drop-down
- ellipsis button
- email
- find foreign key
- hyperlink
- radio button
- shrink/grow textbox
- text entry
- time icon

The group box contains additional information that you or the software can minimize.

1. Click the arrow icon on the left side of the group box title to minimize (close) or maximize (open) the group box.

Student Screen

The group box title is light gray when it is minimized and dark gray when it is maximized.

Student Screen

These colors can vary depending on your chosen color schemes.

Grids

Grids display rows and columns of data. The header row is fixed when scrolling through large grids. You can click **X** to display the **Delete All Records** option if your permissions allow it. If a grid contains detail, select a line and click **Show Detail** or double-click the line to view additional details.

Sorting

Grids display multiple records in rows and columns, similar to a spreadsheet.

Student Screen, Emergency Tab

Each of these grids sorts by the first column of information by default, usually in ascending order. However, you can sort the grids by any of the columns in either ascending or descending order.

- Click on the top arrow in any column to sort a grid in ascending order (smallest to largest, earliest to latest, A to Z).

- Click on the bottom arrow in any column to sort a grid in descending order (largest to smallest, latest to earliest, Z to A).

The current sort order is indicated by the selected triangle turning bright green.
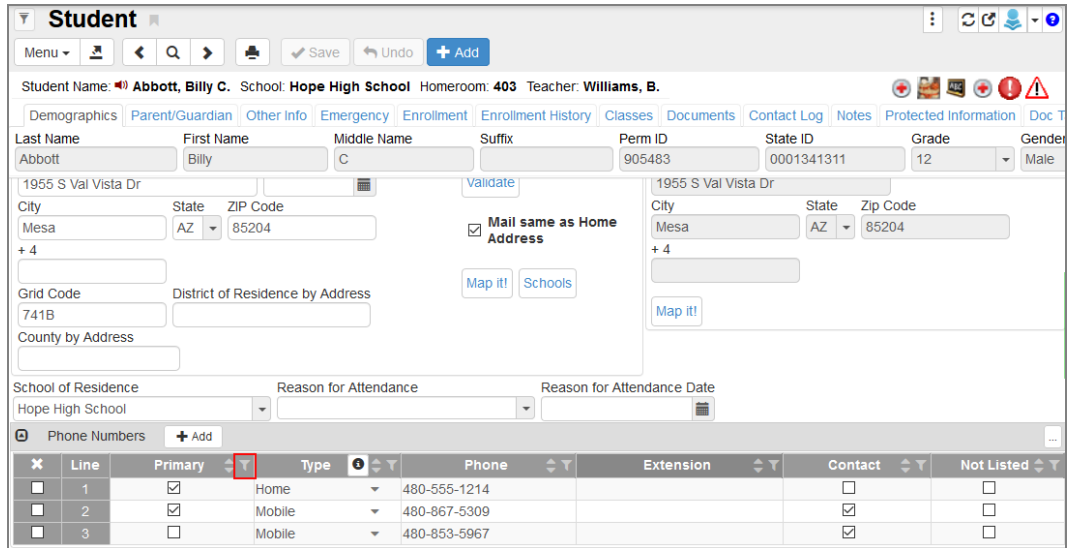
> The customized sort order is not saved and the grid reverts to the default sort if you bring another screen into focus. The sort order saves when switching between tabs of the same screen.

Filtering Examples

Phone Numbers Filter Example

1. Navigate to **Synergy SIS > Student > Student**.

2. Click ▼ on the **Primary** column in the Phone Numbers section.

Student Screen

3. Select an option to display only those phone numbers that satisfy the selection.

> The filter options can be the **Code** or **Description** that represents the lookup values.
>
> The filter options for non-lookup fields are the values available in that grid for that column.

4. Click **Apply**.

Student Screen

The filter icon turns yellow when a filter is applied to that column.
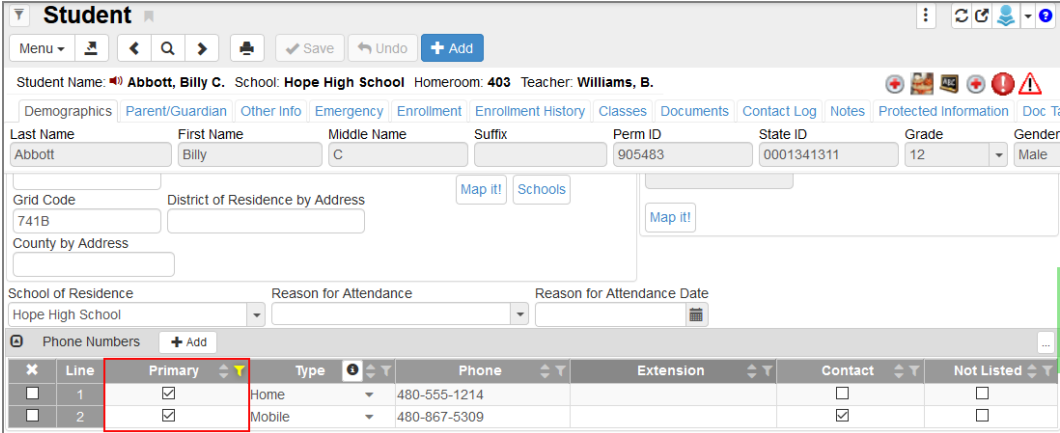
Student Screen

Click **Clear** to remove filters on an individual column in the grid.

Student Screen

Enrollment History Filter Example
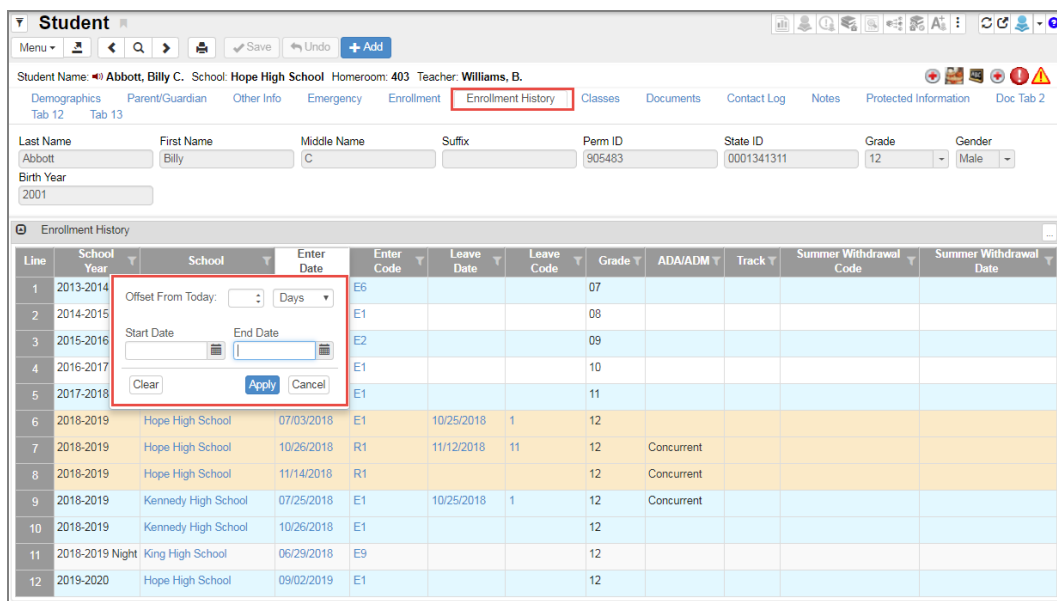
1. Select the **Enrollment History** tab on the Student screen.

2. Click ▼ on the **Enter Date** column in the Enrollment History section.

> **Offset From Today** allows you to select days, weeks, months, or years either after or before the current day.
>
> You can indicate days in the past using the minus sign (-) in front of the offset value.
>
> The **Start Date** and **End Date** automatically populate when **Offset From Today** is entered.

Student Screen, Enrollment History Tab

3. Click **Apply**.

Filtering by Keyword Example

1. Select the **Parent/Guardian** tab on the Student screen.

2. Click [filter icon] on the **Street Address** column in the Siblings section.

3. Enter the keyword to locate.
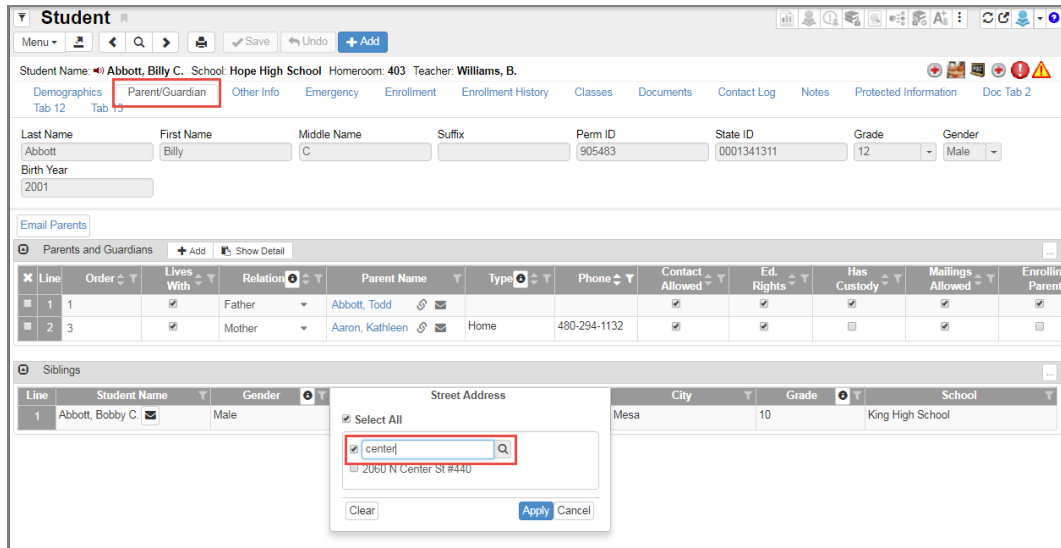
Student Screen, Parent/Guardian Tab

4. Click **Apply**.

Hiding Grid Columns

You can adjust the number and type of columns displayed in grids for the current session.

1. Click the three dots on the grid: ⬚.
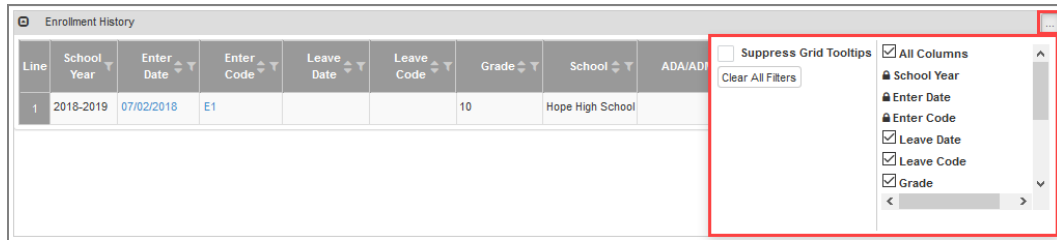
Synergy SIS Grid Column Options

2. Select the columns to display. You cannot hide columns with a lock instead of a checkbox next to the name.

> 📄 displays when there are columns hidden from view.
>
> Certain grids, such as those on **Synergy SIS > Attendance > Period Attendance** and **Synergy SIS > Attendance > Daily Attendance**, display tooltips when hovering over data. Select **Suppress Grid Tooltips** to disable this feature.
>
> Click **Clear All Filters** to remove all applied filters from the grid.
>
> Filters clear when you detach the view, refresh the page, or navigate to another page.

Export Options

You can hover over [...] and select an export option to export data in Excel, CSV, and TXT formats.
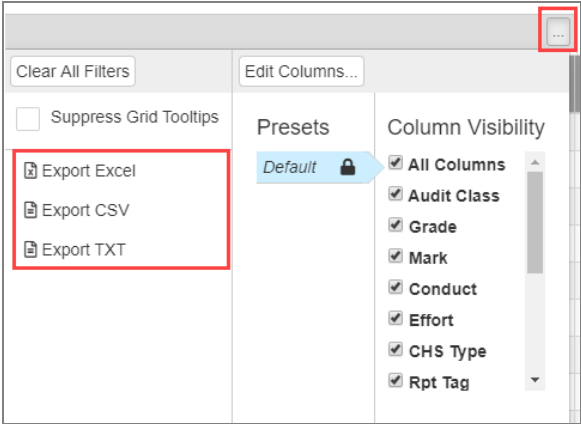
Synergy SIS Grid Export Options

You can also use these export options on Find Result screens.
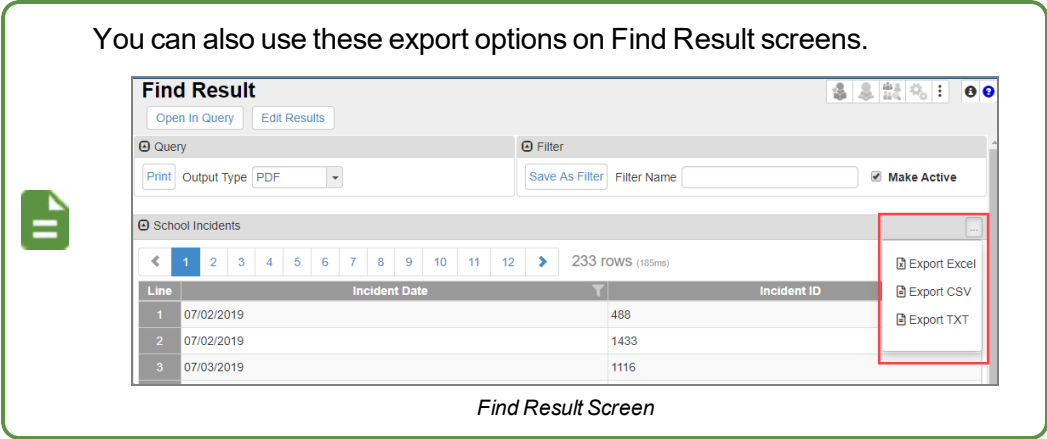
Find Result Screen

Creating an Export File

The data in the Courses grid on the Student Course History screen is exported in this example.

1. Navigate to **Synergy SIS > Course History > Student Course History**.

2. Locate the student.

3. Hover over [...] and select an export option as needed:

- *Export Excel* – A link to the Excel spreadsheet displays. Click it to open the spreadsheet.

Student Course History Screen

Excel Export File Output

> The export file does not include hidden columns, and the columns are in the order of the reordered grid.
>
> Some data may display in the output (PERM ID, for example) even if it is not in the grid itself in order to establish context.

- *Export CSV* – A CSV file opens

CSV Export File Output
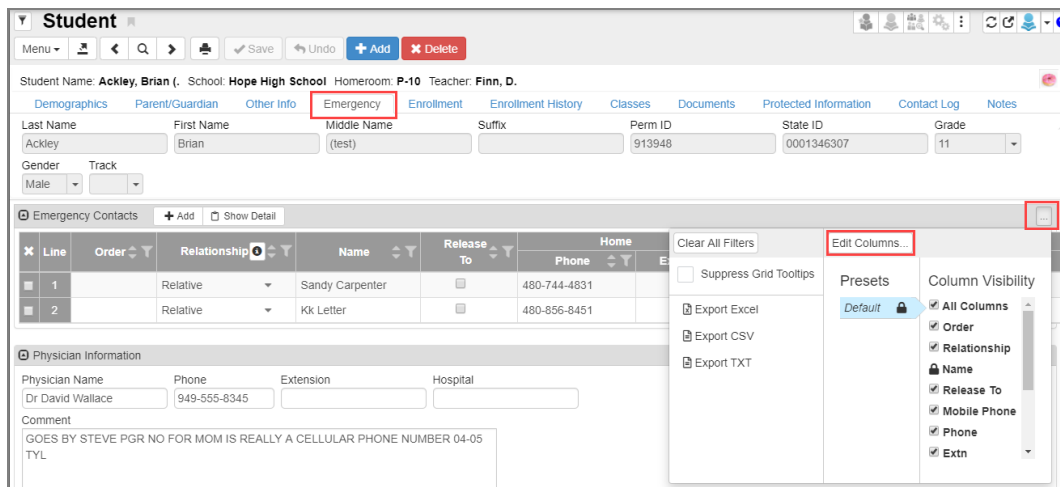
- *Export TXT* – A text file opens

TXT Export File Output

Hiding and Reordering Columns

The **Emergency** tab of the Student screen is used in this example.
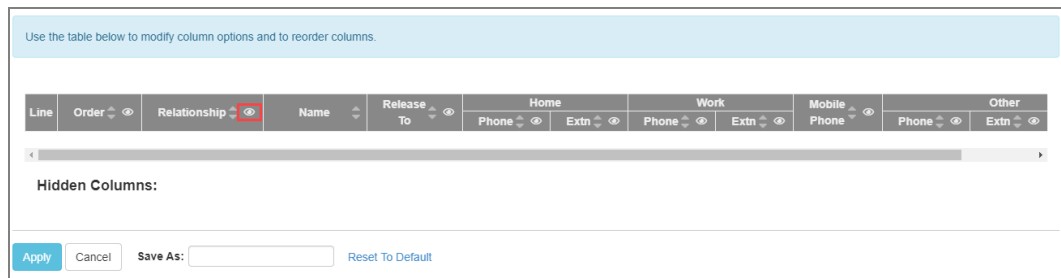
Hiding Columns

1. Navigate to **Synergy SIS > Student > Student**.

2. Select the **Emergency** tab.

3. Hover over [...].

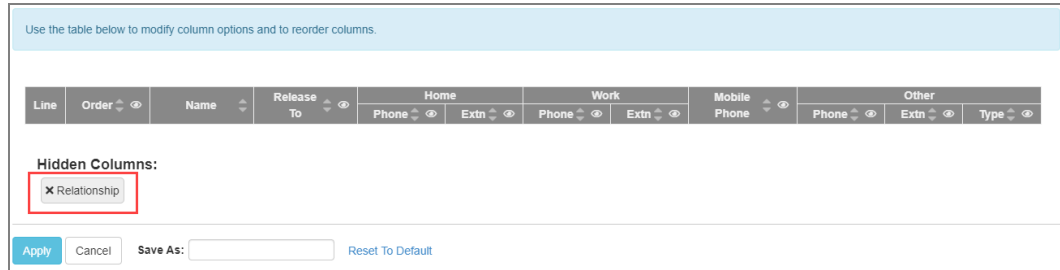4. Click **Edit Columns...** to open the Edit Columns window.

Student Screen, Emergency Tab

5. Click 👁 to hide a column. The column's name displays in the Hidden Columns section.

   - Click the column name in the Hidden Columns section to unhide it.

   - Hiding a required field generates the warning message: 'One or more mandatory fields have been hidden. This may prevent saving changes to the view.'
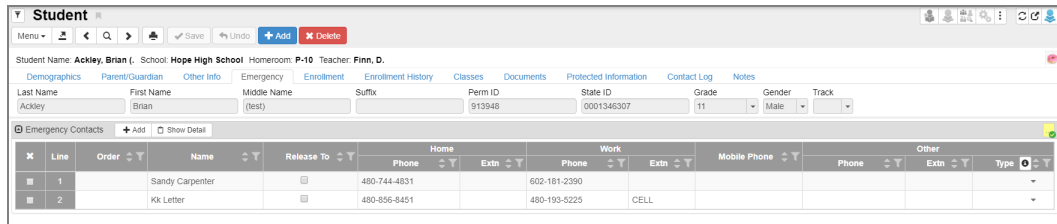

Edit Columns Window

Edit Columns Window (Relationship Column Hidden)

6. Click **Apply**. The column(s) are hidden on the **Emergency** tab of the Student screen.
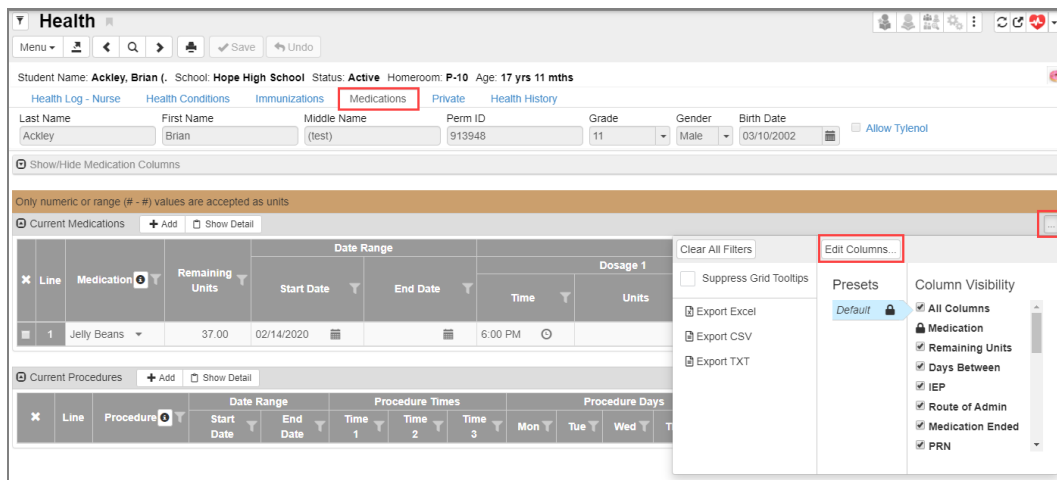

Student Screen, Emergency Tab (Relationship Column Hidden)

Reordering Columns

The **Medications** tab of the Health screen is used in this example.

1. Navigate to **Synergy SIS > Health > Health**.

2. Select the **Medications** tab.

3. Hover over [...].

4. Click **Edit Columns...** to open the Edit Columns window.

Health Screen, Medications Tab

5. Drag columns to a new location as needed.

   - An individual column can be dragged to a new location that is outside of supertitles and subtitles. **Medication** can be moved to the left of **Dosage Times**, for example.

   - A supertitle can be dragged to a new location outside of supertitles and subtitles. The **Date Range** can be moved to the left of **Remaining Units**, for example.

   - Subtitles can be dragged to a new location within the supertitle. **Time** can be moved to the left of **Dosage**, or **Dosage 3** can be moved to the left of **Dosage 2**, for example.

   - Click **Reset To Default** to return the window to default settings.

Edit Columns Window (Default)

Edit Columns Window (Modified)

6. Click **Apply**. The modified columns display on the **Medications** tab of the Health screen.

Health Screen, Medications Tab

Creating and Modifying Presets

The **Medications** tab of the Health screen is used in this example.

Creating Presets

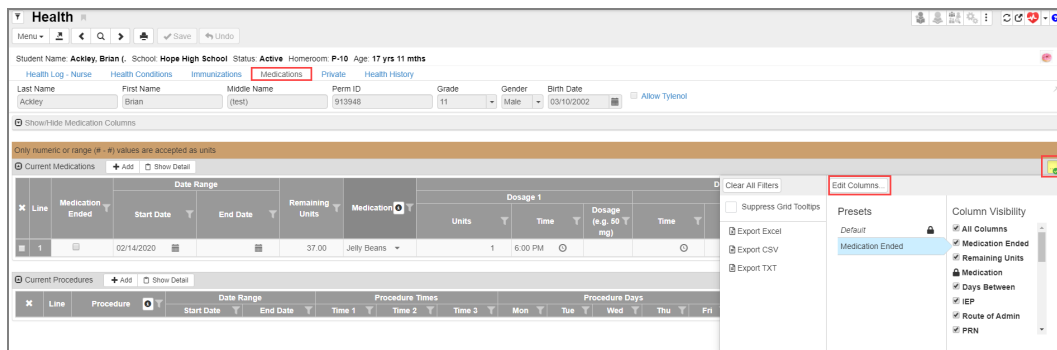You can set up presets (templates) for future use.

> Presets are specific to the user and the grid they are created in.

1. Navigate to **Synergy SIS > Health > Health**.
2. Select the **Medications** tab.
3. Hover over [icon].

> The icon is yellow with a green checkmark indicating that the grid was modified.

4. Click **Edit Columns…** to open the Edit Columns window.

Health Screen, Medications Tab

5. Hide and reorder columns as needed.

> A 'One or more mandatory fields have been hidden. This may prevent saving changes to the view.' message displays if you try to hide a mandatory column.

6. Enter a **Preset Name**.

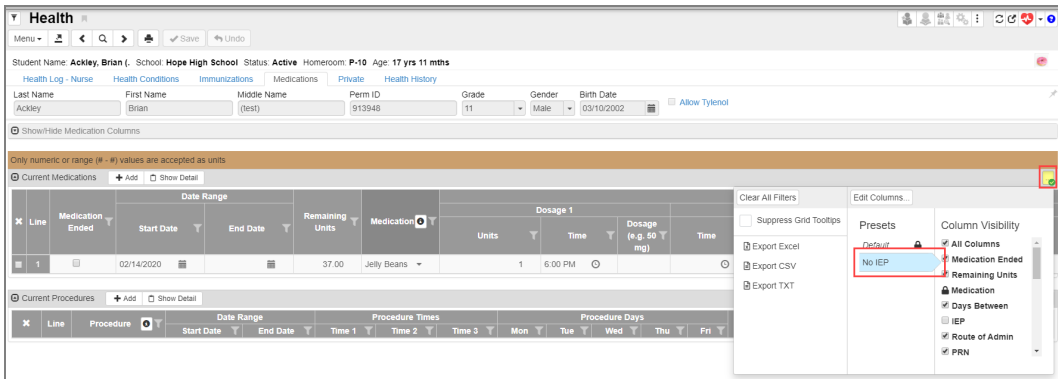> The **Apply** option changes to **Save** when a name is entered in **Save As**.

Edit Columns Window

7. Click **Save**.

8. Click [icon]. The **Preset Name** displays in the **Presets** column.
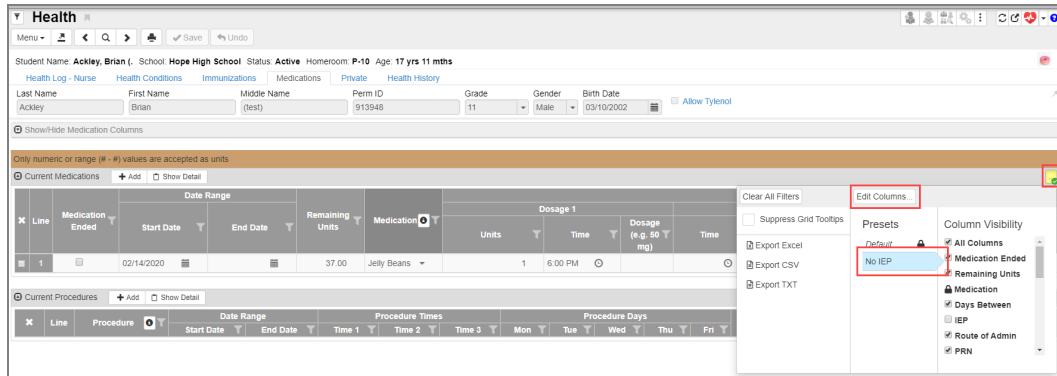
Health Screen, Medications Tab

Modifying Presets

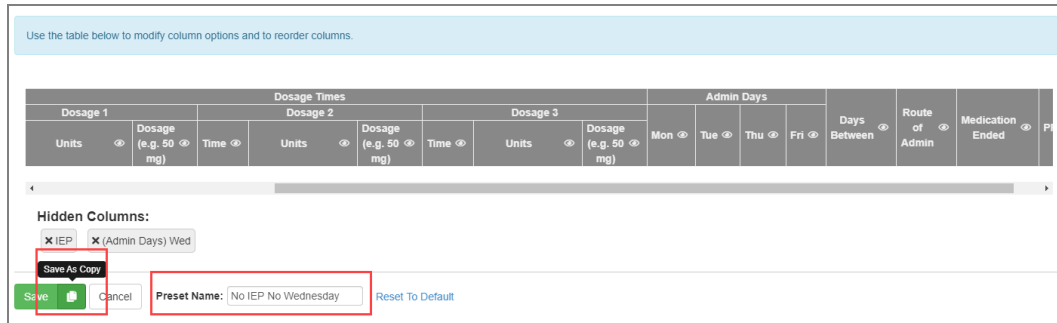You can also modify a preset in the Edit Columns window and rename it.

1. Hover over [icon].

2. Select the preset you want to modify.

3. Click **Edit Columns…** to open the Edit Columns window.

Health Screen, Medications Tab
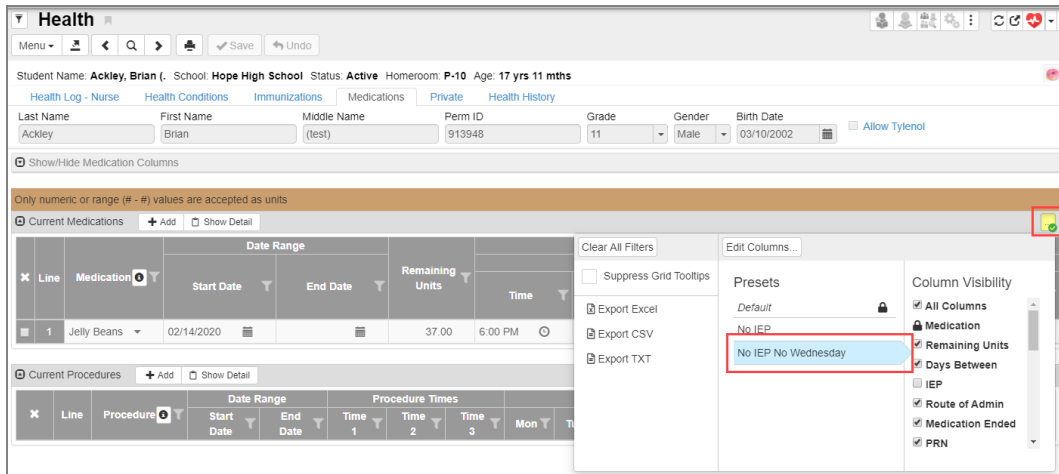
4. Reorder, hide, or unhide columns as needed.

5. Enter a new **Preset Name**.

6. Click **Save As Copy**.
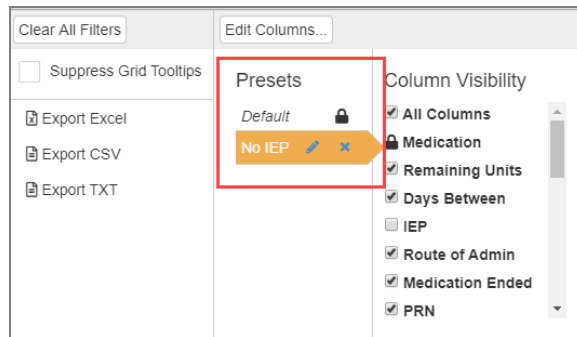

Edit Columns Window

7. Click ▢. The new **Preset Name** displays in the **Presets** column.

Health Screen, Medications Tab

You can select *Default* in the **Presets** column to return to default settings.

You can modify and delete a preset in the **Presets** column.

Grid Options Menu

Comment Fields

Also in the content area are **Comment** fields. These fields allow you to enter additional information about a student, for example, on certain screens.

Student Screen, Emergency Tab

You can resize the **Comment** field by following these steps to accommodate longer comments:

1. Click inside the **Comment** field. The action bar opens outside the text area.

2. Click to toggle the screen. This maximizes the area allowing you to view longer comments. Double-clicking the action bar also maximizes the field area.

> If you select anything outside of the **Comment** field or action bar, the **Comment** field returns to the original size.

Comment Field

Memo Templates

Memo templates are available on all **Note** and **Comment** fields in Synergy. You can share templates across the district and between schools.

> Templates are tied to the user who created them and the specific field they are created on.
>
> Tokens that use a student's first, last, or full name display for the memo fields on student-related screens.

Add a Memo Template
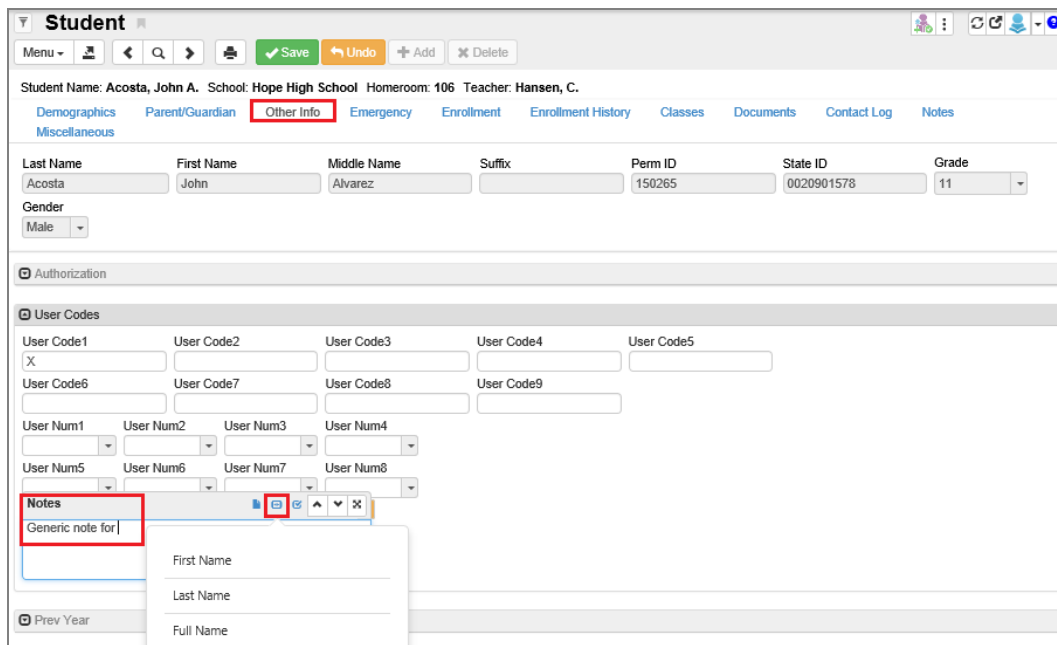
The following example shows how to create a template in a **Notes** field.

1. Navigate to **Synergy SIS > Student > Student**.

2. Locate a student.

3. Select the **Other Info** tab.

4. Enter the **Notes** for the student in the User Codes section.

5. Click ⬅➡ on **Notes** to insert a token.

> The header bar on memo fields display only when you click the field.
>
> Tokens are only available for student-related memo fields.

Student Screen, Other Info Tab

6. Click **Save**.

7. Click on **Notes** to open the template menu.

8. Select *Create Template From Field* to open the Create Template window.

Student Screen, Other Info Tab

9. Enter a **Name** for the template.

10. Select **District Access**.

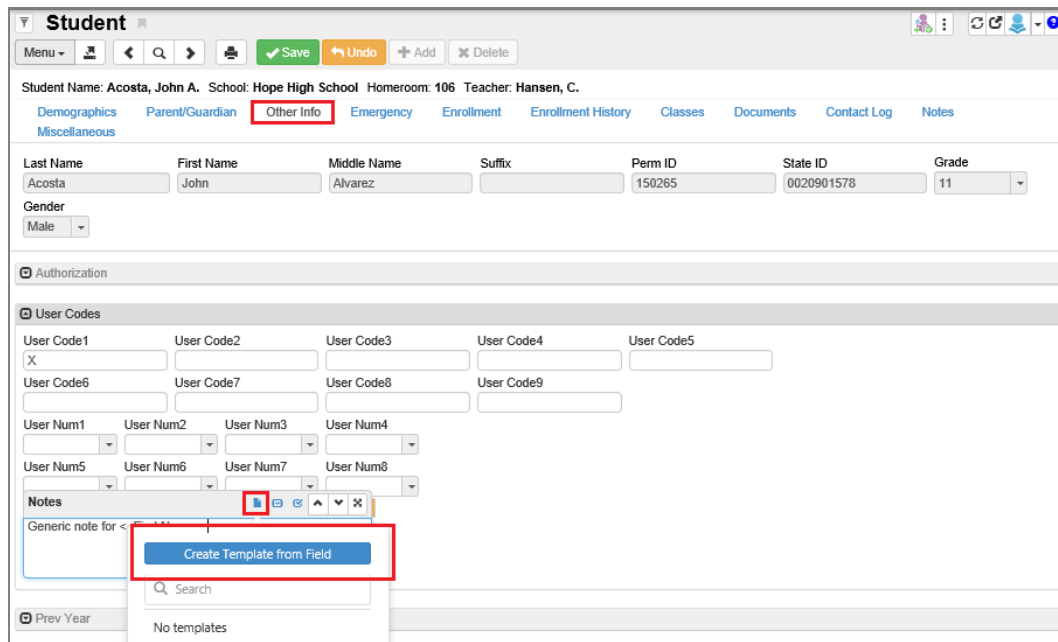> Selecting **District Access** allows all users in the district to see the template.
>
> Deselecting **District Access** allows only the user who created it to see the template.
>
> You can see all the templates you created regardless of the focus.

11. Select a **School Type**.

- *All* – Visible to all schools
- *Elementary School* – Visible to users while focused to elementary schools
- *Middle School* – Visible to users while focused to middle schools
- *High School* – Visible to users while focused to high schools
- *Special School* – Visible to users while focused to special schools

> **School Type** is defined on the School Setup screen.

12. Enter the template text.

Create Template Window

13. Click **Save**. The template is now available for the memo field.

Edit a Memo Template

1. Click 📄 on **Notes** to open the template menu.

2. Hover over the template to edit.

3. Click ✏ to open the Edit Template window.
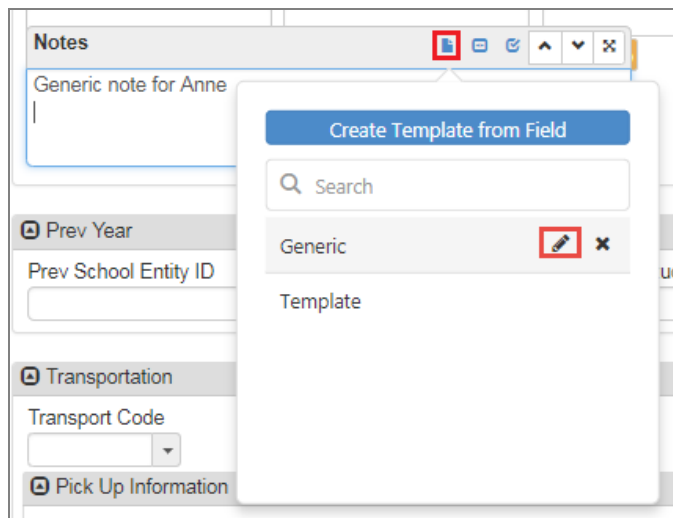
Student Screen, Other Info Tab

4. Click to modify the token used in the template if needed.
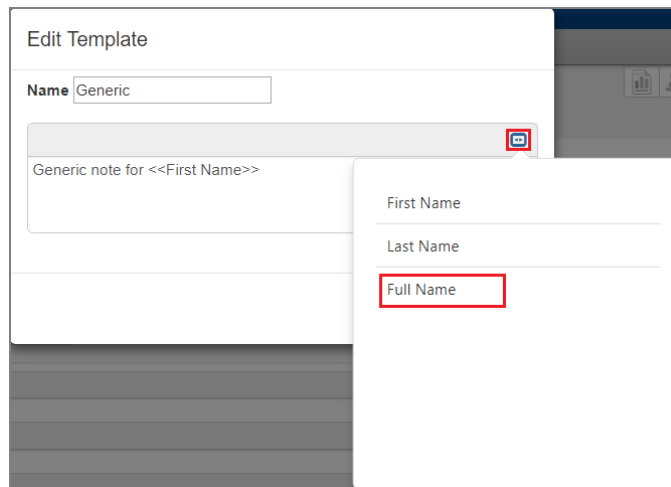
Edit Template Window

5. Click **Save**.

Insert a Template in a Memo Field

1. Click on **Notes** to open the template menu.

2. Select a template from the list.

> The template text displays in the field. The student's name also displays if you used tokens.
>
> You can insert more than one template into a **Note** field.

Edit Template Window

Student Screen, Contact Log Tab

3. Click **Save**.

Delete a Template

1. Click 📄 on **Notes** to open the template menu.

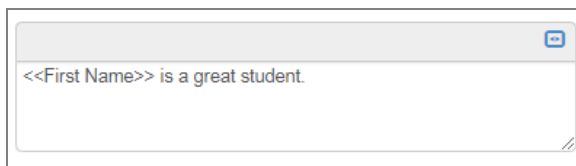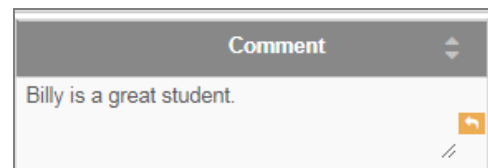2. Click ✖ on the template to delete.
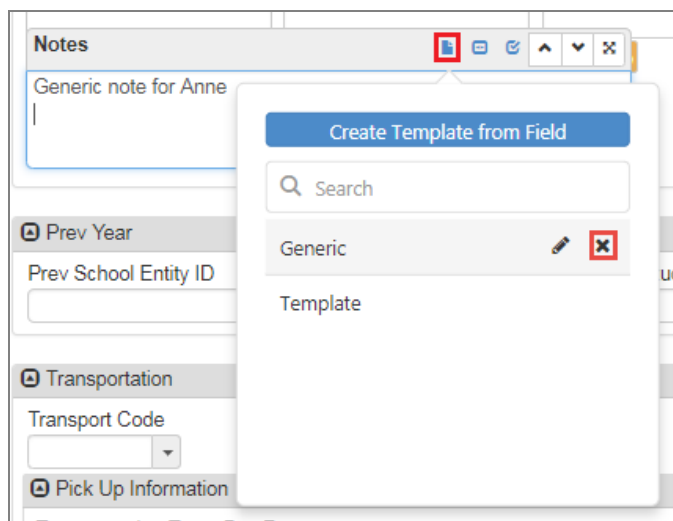
Student Screen, Other Info Tab

3. Click **Yes** on the confirmation message.

Feedback Button

The Feedback button allows you to send feedback to Edupoint about Synergy. By default, the button displays minimized on the right side of the screen. Hovering over the button allows you to view the button, change the position of the button, or click the pin icon to leave the button visible.

Feedback Button

1. Click **Feedback** on any Synergy screen to open the Synergy Feedback window. The screen you are using displays in the window by default. This example uses the Student screen.

2. Include written feedback as needed.

3. Select **Include Screenshot** or click the image to include the screenshot on the Feedback window.

> 📄 You can also paste an image from your clipboard to replace the default screenshot.

4. Edit the screenshot as needed.

- **Crop** – Selects only the part of the image you want to use
- **Blackout** – Covers sensitive information
- **Highlight** – Highlights portions of the image in yellow
- **Outline** – Places a red box around portions of the image
- **Draw** – Draw freehand on the image
- **Reset** – Reverts the image to the original
- ⛶ – Enlarges the image. Select the icon again to revert back to the original size.

Synergy Feedback Window

5. Click **Send Feedback**.

Using New Feature Assist

New Feature Assist (NFA) provides an introduction to new features added to Synergy using a small pop-up screen.
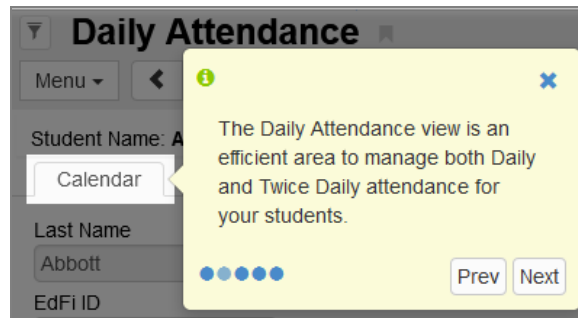
New Feature Assist Example

The first NFA prompt displays in the center of the screen the first time you navigate to a screen after the NFA is added. Click **Next** after reading the prompts to move to the next one.
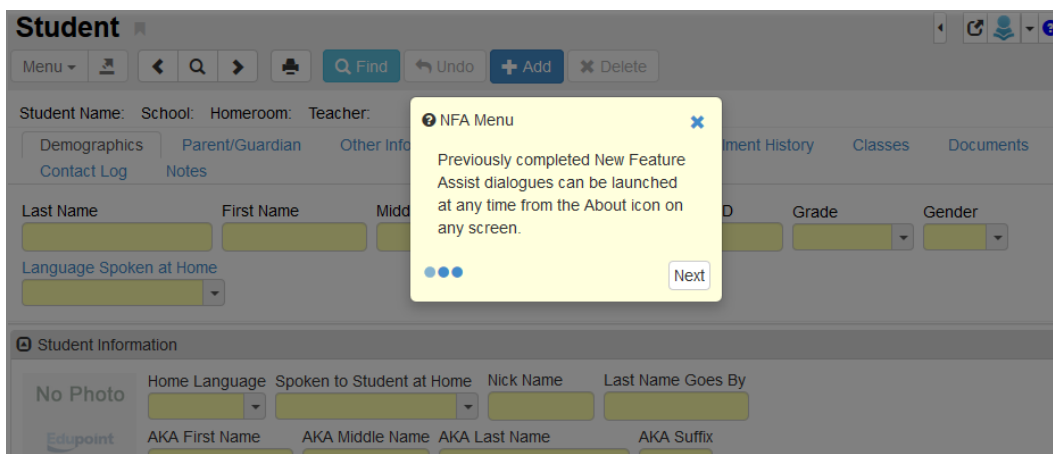
Student Screen

Subsequent prompts typically highlight the item on the screen they are describing. They also have a **Prev** button, which allows you to backtrack through the prompts.
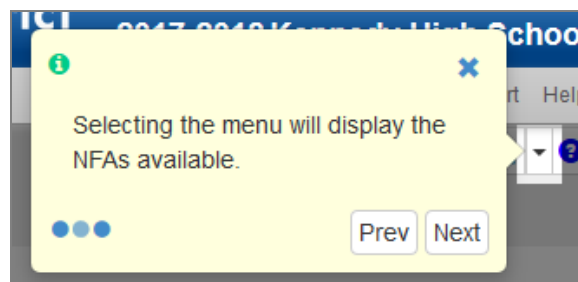
Student Screen

You can also navigate directly to a prompt by clicking on the dots at the bottom.

NFA Prompt
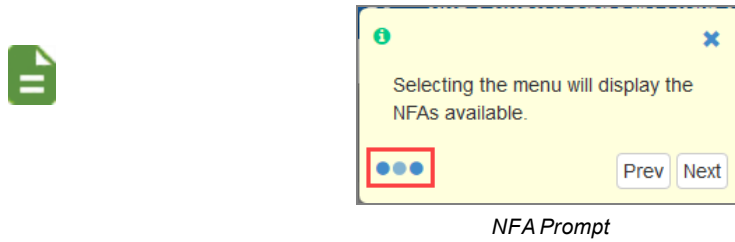
The last prompt has a **Got It!** button in place of the **Next** button. Clicking **Got It!** tells Synergy that you read through all the prompts and closes the NFA record. Clicking **Got It!** also tells Synergy not to prompt you with this NFA record again.

Student Screen
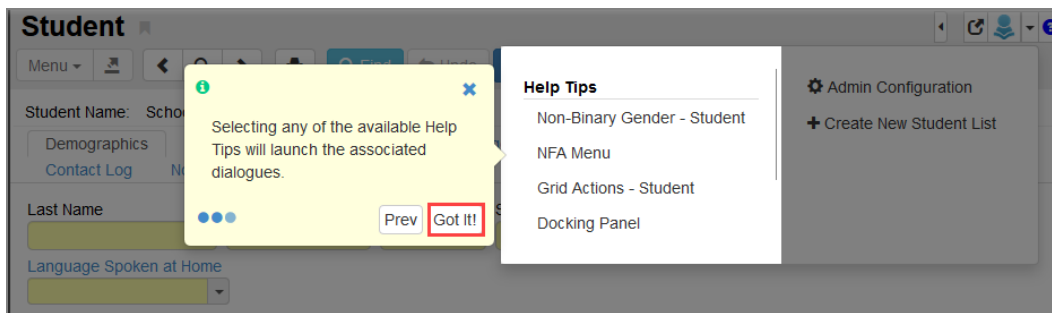
Hovering over the arrow icon in the top-right corner of Synergy SIS displays a list of available Help Tips. You can click the Help Tips to replay new feature assist messages, regardless of if you already clicked **Got it!** or not.

Synergy SIS Home Screen
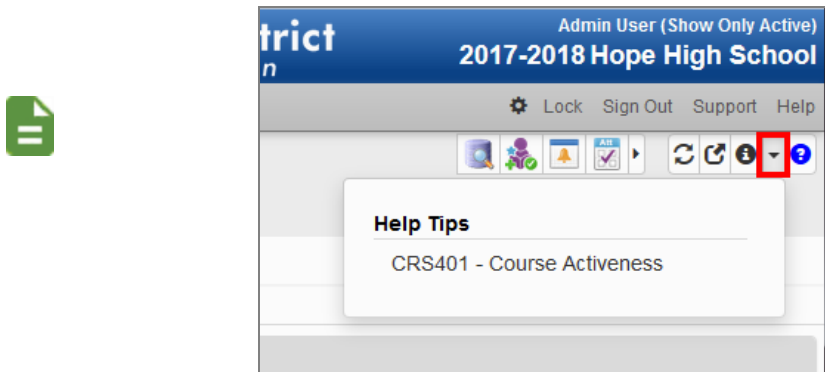
Using Snooze and Don't Remind Me Again

You can select **Snooze** or **Don't Remind Me Again** on the NFA prompts.

This is an example of how to Snooze and Dismiss the NFA on the CHS202 – Student Graduation Requirement Profile screen.

1. Navigate to **Synergy SIS > Course History > Reports > Individual > CHS202 – Student Graduation Requirement Profile**.

2. Click ✖ to open the Snooze/Don't Remind Me Again window.
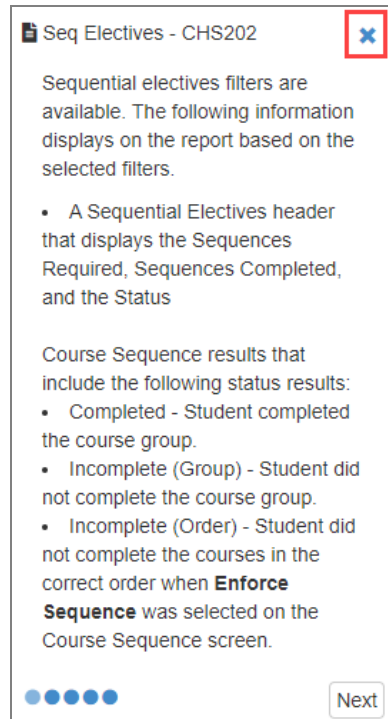
CHS202 – Student Grad. Requirement Profile Screen, NFA Prompt

- **Snooze** – The NFA no longer displays when navigating to that screen until you log out of Synergy. The NFA displays again if you log back in to Synergy and navigate to that screen.

- **Don't Remind Me Again** – The NFA no longer displays when navigating to that screen.
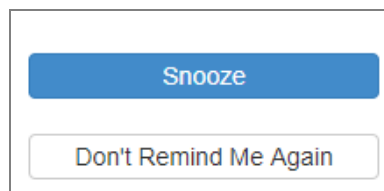
Snooze/Don't Remind Me Again Window

Action Bar

The Action Bar contains icons, buttons, and indicators for various functions specific to the currently displayed screen.

Synergy Action Bar

Filter

The **Filter** icon is a funnel to the left of the title of the screen. The filter uses a custom query to filter the records displayed on the screen.

> See the *Synergy SIS – Query and Reporting Guide* for more information about creating and using filters.
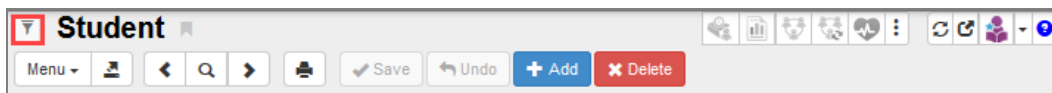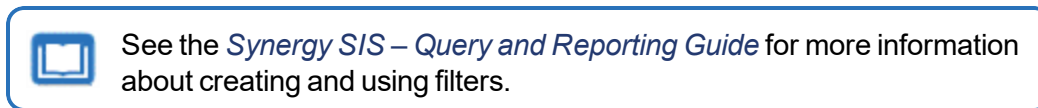
Synergy Action Bar

Screen Name

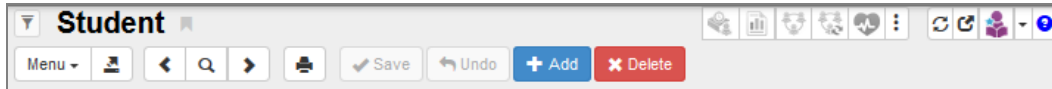The Screen Name always displays in the title area of each screen. You can enter the Screen Name in the Quick Launch bar to navigate quickly to a particular screen.
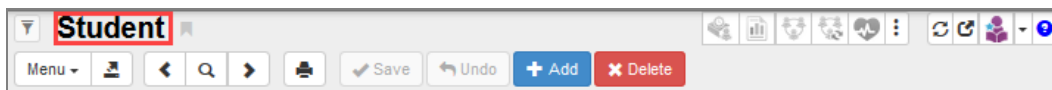
Synergy Action Bar

Bookmark

Click the **Bookmark** icon to the right of the screen title to flag any frequently used screen, report, or process for quick access later.

Synergy Action Bar

Quick Nav

The Quick Nav bar stores icons for screens selected by the user as shortcuts.
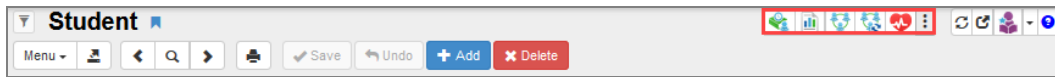
Synergy Action Bar

Additional Quick Nav options display when ⋮ is clicked.
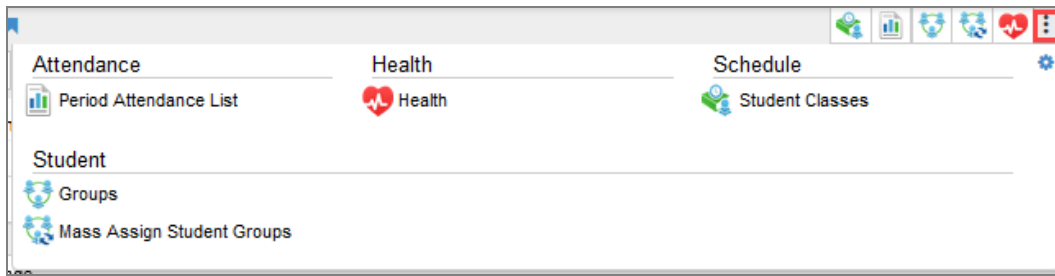
Synergy Action Bar

Refresh View

This refreshes the data on the current screen.
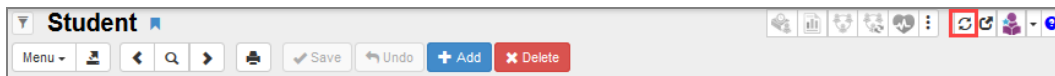
Synergy Action Bar

Detach View

This opens the screen in a separate browser window. In a detached screen, all of the normal functions on the screen still work, such as entering information in fields. An unlimited number of detached screens can be opened.
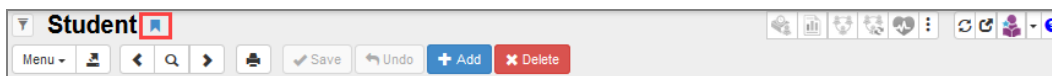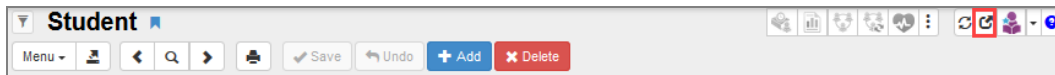
Synergy Action Bar

About

This shows information about the current screen in view, including the PAD Tree location. You can also Reset View Preferences and Restore Help Tips for the screen.
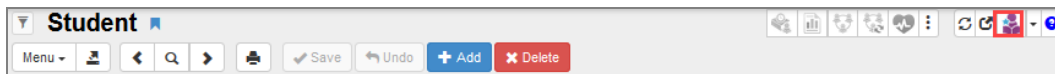
Synergy Action Bar

Screen Utilities

Help Tips

Click the arrow to display the Help Tips that are available even if you already clicked **Got it!** in the New Feature Assist prompt.
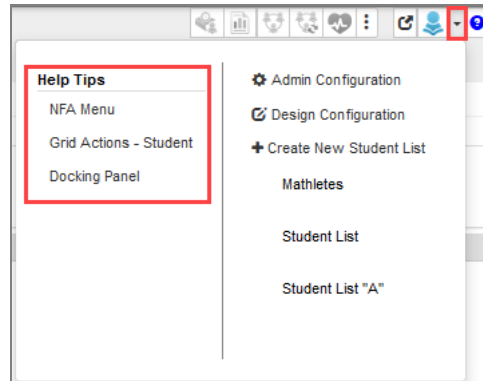
Screen Utilities

Create New Student List

You can create a customized new student list.

1. Select *Create New Student List*.
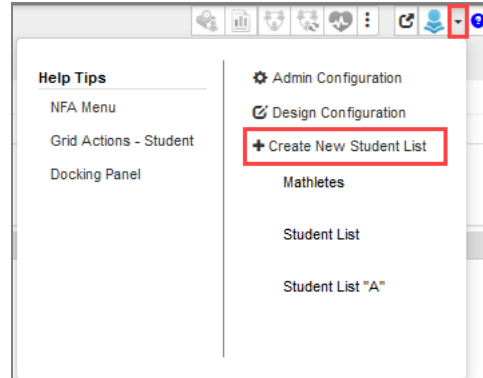
Screen Utilities

2. Enter the **Perm ID** or the first few letters of the **First Name** or **Last Name** on the Chooser screen that opens.
3. Click **Find**.

Chooser Screen

4. Enter a new name for your list in the **Student List** field to rename the list.
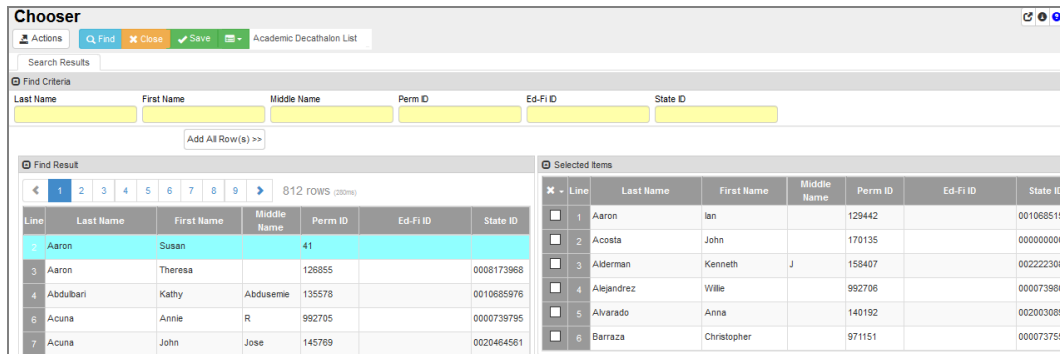
Chooser Screen

5. Click **Save**.

6. Click the list icon to access your student lists. Select your list from the student lists that display.
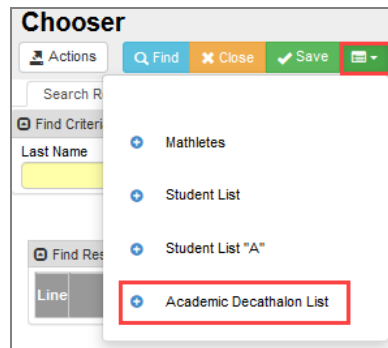
Chooser Screen

7. Click **Actions** to run Reports or Processes for this student list.
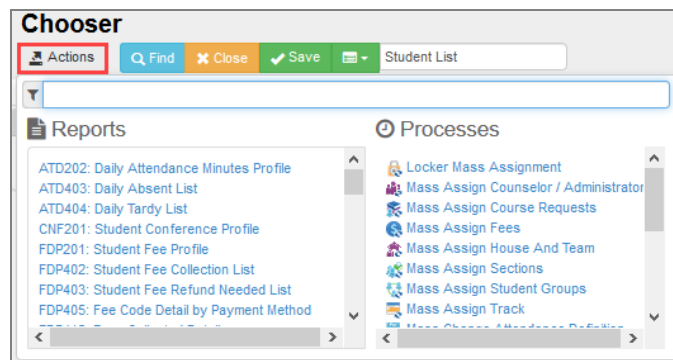
Chooser Screen

Context Sensitive Help

The question mark icon opens a window with help pertaining to the current screen.
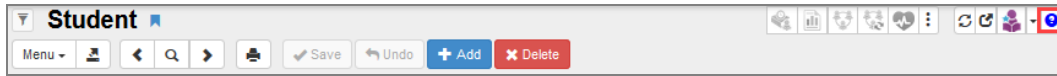
Synergy Action Bar

This is an example of the context sensitive help that displays when the icon is clicked.
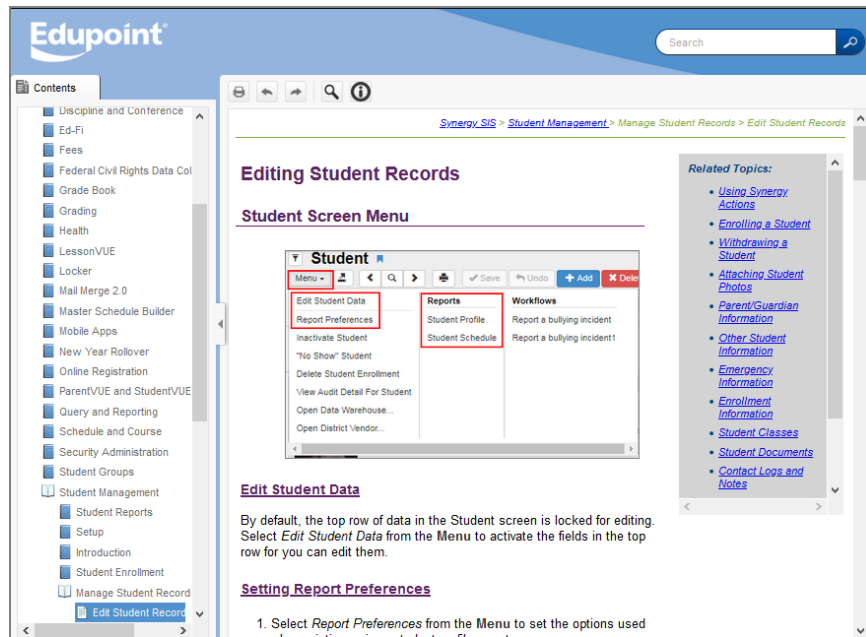
Context Sensitive Help Window

Menu

The **Menu** contains a selection of actions for the screen, Reports, and Workflows depending on the user's permissions.

Synergy Action Bar

Actions

The **Actions** button contains links to Reports and Processes within Synergy SIS. This button is not available on all screens.
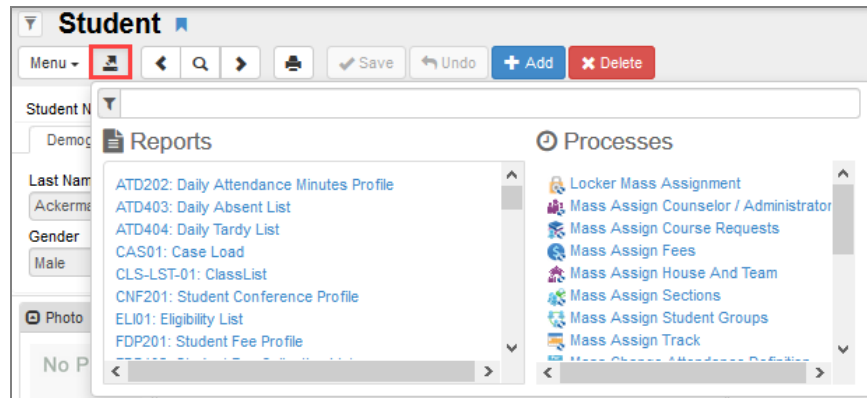
Synergy Action Bar

> See the the *Synergy SIS – Student Management User Guide* for more information about Actions on the Student screen.

Previous

This scrolls to the previous record on the screen. Records sort in alphabetical order by the first field on the screen, so **Previous** scrolls through the records in descending order by this field.
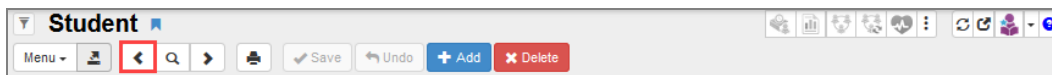
Synergy Action Bar

Find

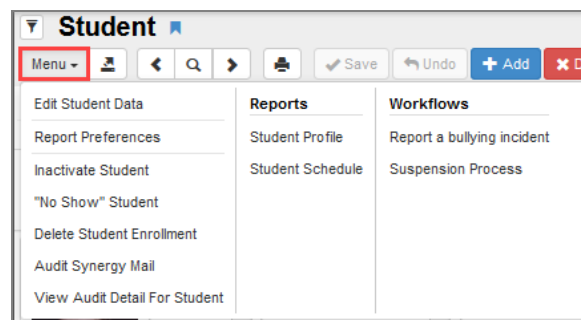The **Find** icon switches the screen to find records instead of screening or editing the records. The fields in the screen become yellow in Find mode.

Synergy Action Bar

Next

Next scrolls to the next record on the screen. Records are sorted in alphabetical order by the first field on the screen, so **Next** scrolls through the records in ascending order by this field.

Synergy Action Bar

Print

This prints the current screen as displayed.

Synergy Action Bar

Edit/Find/Save

The **Edit**, **Find**, and **Save** buttons change as the screen is set in different modes.

In Inquiry mode, an **Edit** button switches the screen so that the record can be changed.
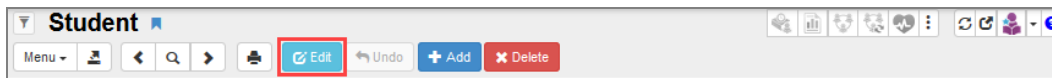
Synergy Action Bar (Inquiry Mode)
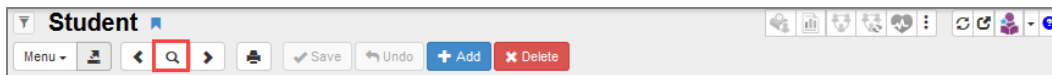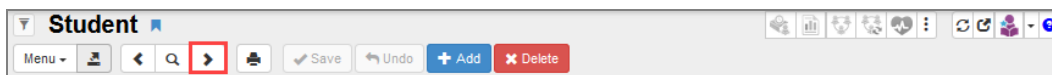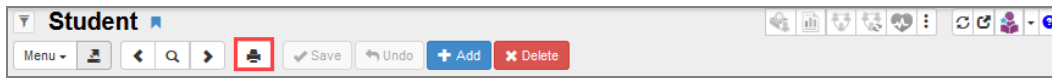
In Find mode, the **Find** button searches for records that match the information entered on the screen.

Synergy Action Bar (Find Mode)

In Edit mode, click the **Save** button to save any changes made to the record on the screen.
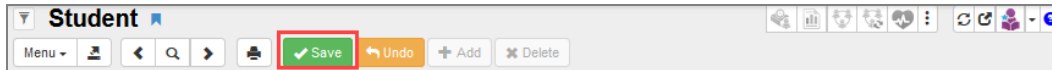
Synergy Action Bar (Edit Mode)

The **Save And Close** and **Undo And Close** options display if you use the detached view in Synergy SIS. This example uses the Student screen in the detached view.

- Using **Save And Close**

    a. Edit the information on the Student screen.

    b. Hover over [×] on the **Save** button to display the **Save And Close** option.

    c. Click **Save And Close**. The detached view closes and the information is updated on the main screen.

Student Screen (Detach View)

> You may need to refresh the main screen to see the changes made in the detached view.

- Using **Undo And Close**

    a. Edit the information on the Student screen.

    b. Hover over ☒ on the **Undo** button to display the **Undo And Close** option.

    c. Click **Undo And Close**. The detached view closes and the information is not updated on the main screen.
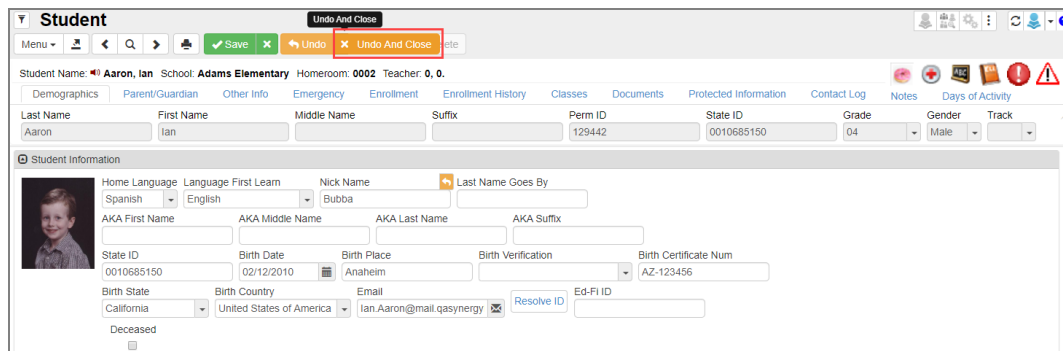
Student Screen (Detach View)

Undo

Undo reverses any changes made to the data on the screen.
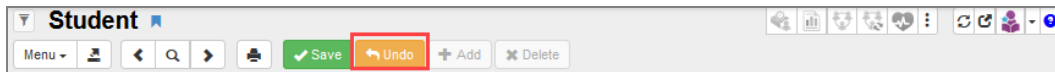
Synergy Action Bar

Add

This opens a screen for adding records to the current screen.

Synergy Action Bar

Delete

This deletes the current record from the screen.

> ⚠ You cannot reverse deletions.

Synergy Action Bar

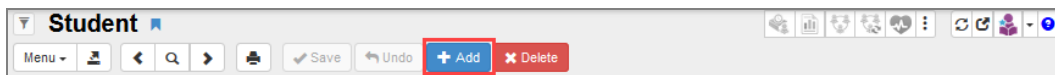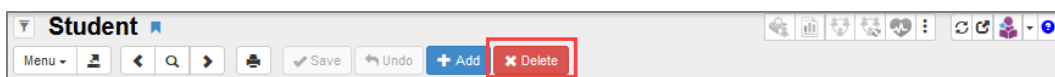## Student Notifications

Student notifications alert staff about specific student circumstances. The student notification icons display on any screen where the student is in focus.

Student Screen

> 📖 See the *Synergy SIS – Student Management User Guide* for more information on Student Notifications.

Checklists

You can create checklists from the **Actions** menu. This functionality exists where there is an **Actions** menu, generally screens associated with students and sections. You can also create checklists in reports and queries.

> 📄 You can still create checklists in Screen Utilities, but they display in **Checklists** on the Navigation panel.

Creating a Checklist on the Find Result Screen

This example uses the Student screen.

1. Navigate to **Synergy SIS > Student > Student**.
2. Enter the search criteria as needed.
3. Click **Find** to open the Find Result screen.
4. Click **Actions**.

5. Click **Save As List**.
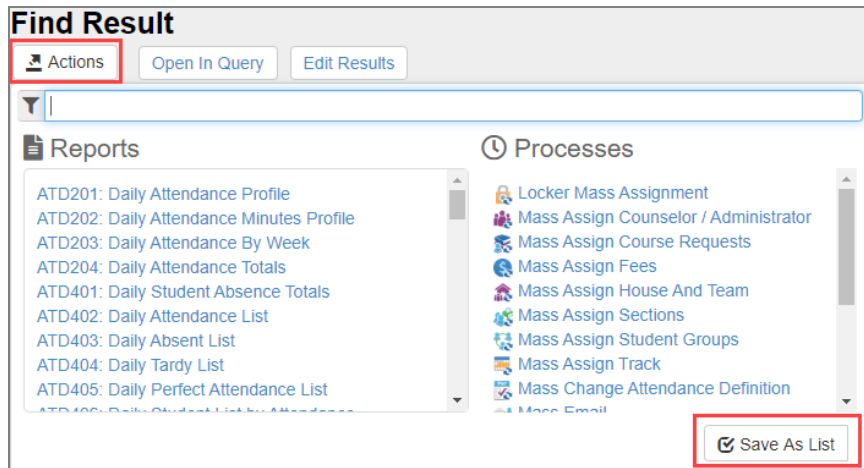
Find Result Screen

6. Enter a **List Name**.
7. Enter a **Description** if needed.
8. Click **Create**.
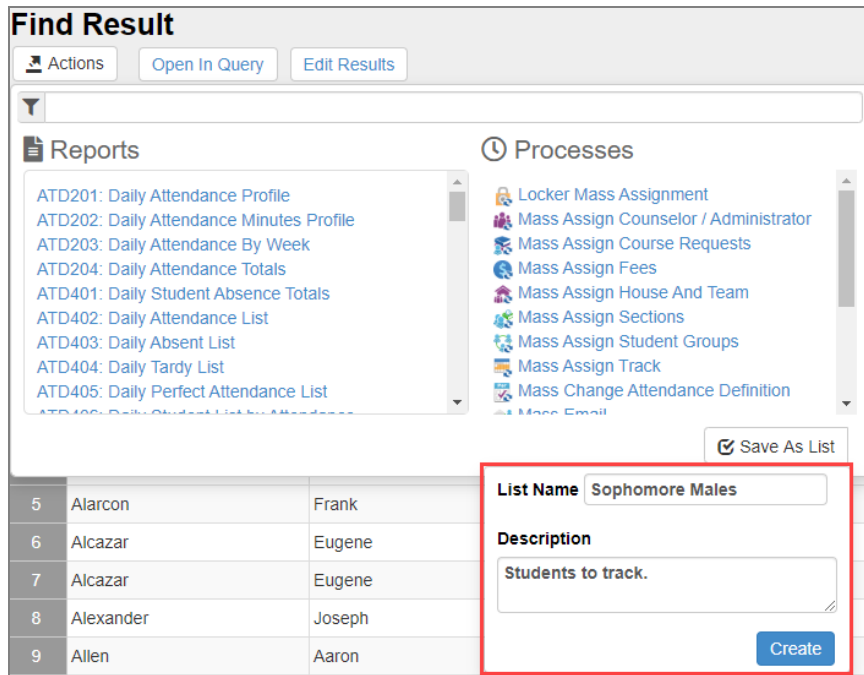
Find Result Screen

9. Hover over ☑ on the Navigation panel. The new checklist displays.
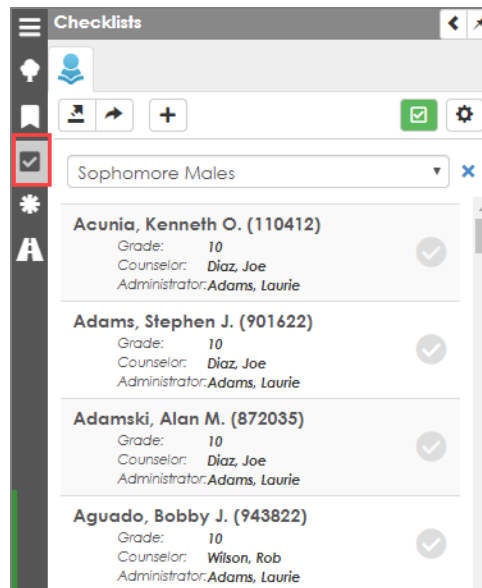
Checklists

> Students in a checklist who have records at other schools in the district for the same school year have a link next to their names for each school when you are focused to district. You can click the link to see the student record at that school. The student may have a concurrent enrollment at another school or be a no show, for instance.
>
>
>
> *Checklists*
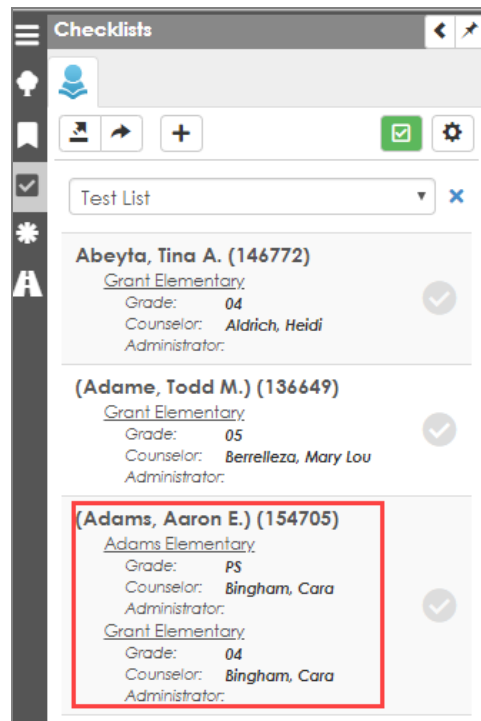
Creating Checklist in Reports

This example uses the STU201 – Student Profile screen.

1. Navigate to **Synergy SIS > Student > Reports > Individual > STU201 - Student Profile**.

2. Enter report options as needed.

3. Click [icon].

4. Deselect **Print This Report**.

5. Click **Save As List**.
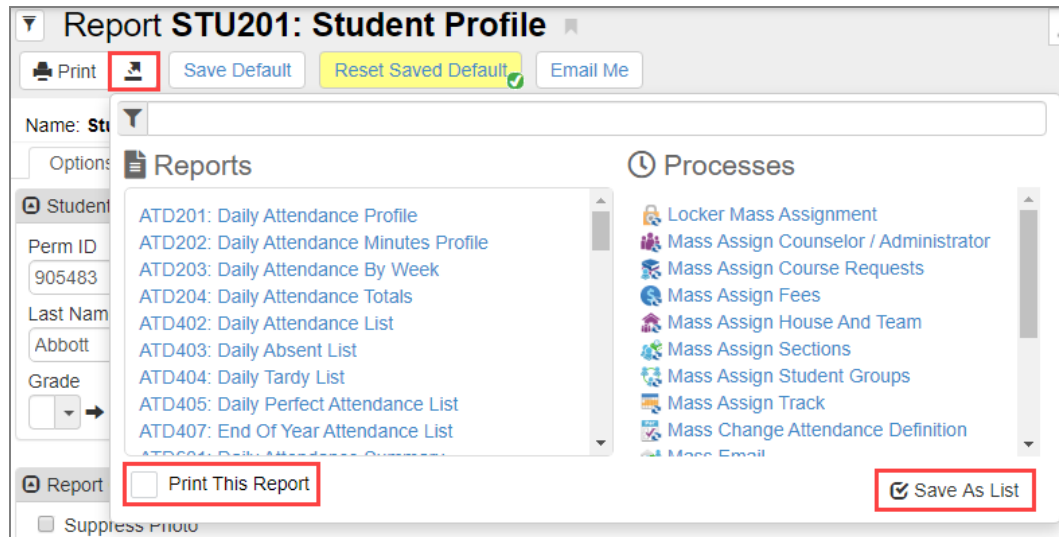
STU201 – Student Profile Report Interface Screen

6. Follow steps 6-8 as outlined above in .

7. Hover over [icon] on the Navigation panel and click [icon] to access the report from **Checklists**.
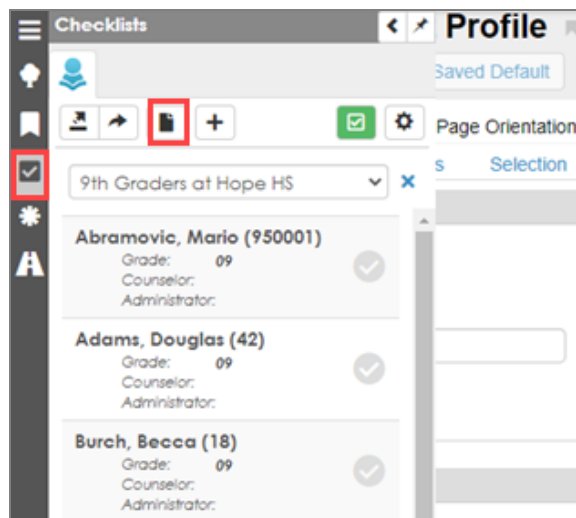
Checklists

Creating a Checklist in Query

1. Navigate to **Synergy SIS > Query > Query**.
2. Enter the query.

> 📄 The **Output Type** must be *HTML*.

3. Click **Execute**.
4. Follow steps 4-9 as outlined above in Creating a Checklist in the Find Result Window.
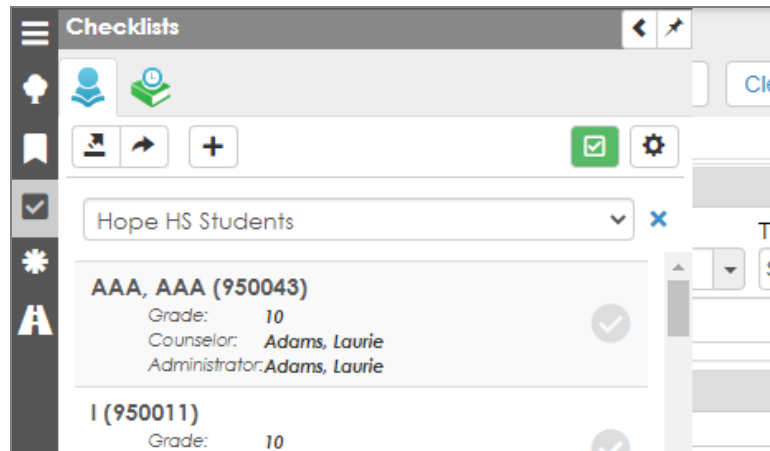
Checklists

Using Checklist Options

- Use ⬇⬇ to toggle between Student and Section Checklists. These display when there is at least one checklist in the category.

- Click ⬆ to open the **Actions** menu to select Reports and Processes to generate.

- Click ➔ to open the Share List window. You can select individual counselors, or select **Add All Counselors** to share with all counselors assigned to students in the current focus.
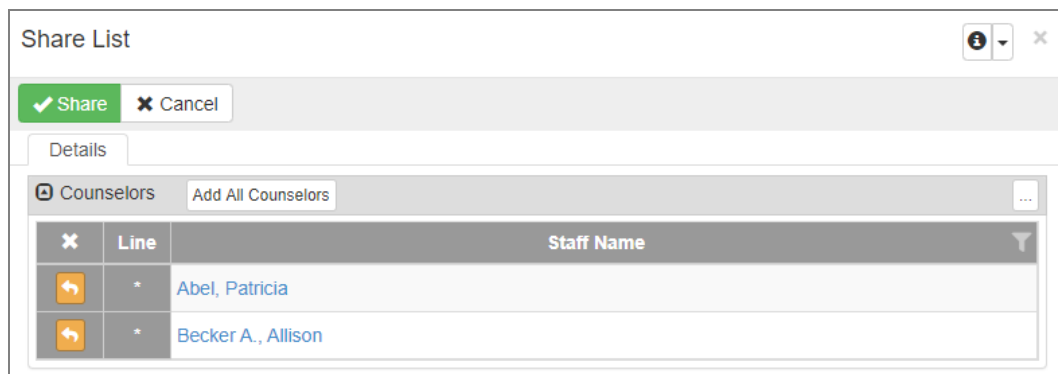
Share List Window

- Click ▮ to display Report Checklists. This displays if there is at least one report in the category.

- Click ⊞ to open the current Checklist in the Chooser screen to add or delete information.

- Toggle ☑ to display the checklist. Items marked with a ✅ are complete.

- Toggle ☑ to display only items that are not complete.

- Toggle ⚙ to display filters that allow you to sort by **Grade**, **Counselor**, and **Administrator**. You can also edit the **Checklist Name** and **Description**.

> 📄 You can also click 👁 on **Grade**, **Counselor**, and **Administrator** to hide that field.
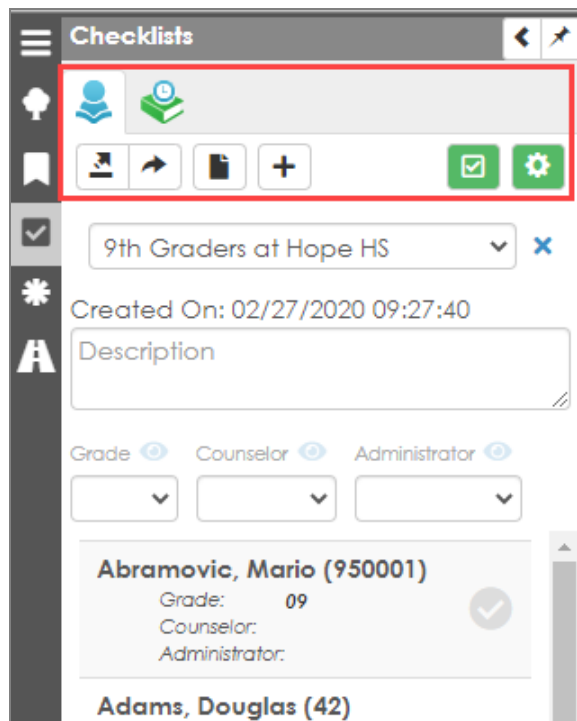
Checklists

Searching Setup Options

The Search Setup Option screen allows searching setup options on all setup screens in Synergy.

In this example, *number of days* is entered in **Search**, and *Number of days into the future, the teacher can take attendance* on the District Setup screen is selected from the search results.

1. Navigate to **Synergy SIS > System > Search Setup Option**.
2. Enter the setup keywords in **Search**.

> All screens that contain the keywords entered in **Search** display in the Results section.

3. Click the screen name hyperlink in the **View** column.

Search Setup Option Screen

The screen opens and the search keywords are highlighted in yellow.

District Setup Screen, TeacherVUE Tab

Chapter 3:
Finding and Sorting Records

Scrolling to Find Records

The examples in this section show how to search within the Student screen. You can use the same technique on any screen in Synergy SIS.

1. Click **>** to advance to the first student record. Records sort alphabetically by the first field on the screen, which is **Last Name** in this case. The first student to display most likely has a last name beginning with *A*.

2. Click **<** to scroll in reverse alphabetical order by the first field on the screen.

▼ **Student** 🔖

Menu ▾ **<** 🔍 **>** 🖨 ✔ Save ↩ Undo **+ Add** **✖ Delete**
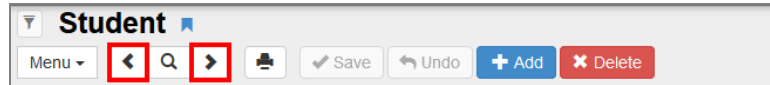
Student Screen

3. Continue scrolling to locate the appropriate record.

The focus set in the upper right-hand corner of the screen controls the available records when scrolling or finding. For example, if you set the focus to show only active students, you cannot find an inactive student's records by scrolling or finding. You must change the focus to display inactive students for those records to display when scrolling or finding records.

Searching by Primary Field

While scrolling can be a good way to find a specific record in a small group of records, it can be time-consuming to scroll through many records.

> 📄 The examples in this section show how to search within the Student screen. You can use the same technique on any screen in Synergy SIS.

Find Mode

Find mode can make it easier to find the exact record when searching through large groups of records.

> ⚠️ Clicking 🔍 clears all data from the screen. Make sure to save any changes before clicking 🔍 .

1. Click 🔍 .

Student Screen

> 📄 Screens open in Find mode when you log in to Synergy SIS. The fields display in yellow to indicate that the screen is in Find mode. Once you select a student record, that student's records display on all of the student-related screens. For example, if you look at a student's record on the Student screen, then select the Student CTE screen, that student's record also displays on the Student CTE screen without having to search for them.

Student Screen

2. Enter all or part of the **Last Name**.

3. Click **Find** or press Enter.

   - If no **Last Name** contains the letters entered, the next record closest to the searched name displays.

   - If the letters entered for the **Last Name** match all or part of a student's last name, the first student with the last name matching the entered information displays. For example, if you entered the **Last Name** *Doe* and more than one student with the last name Doe is available, the screen shows *Jane Doe*'s information, because Jane Doe is alphabetically listed before Janet Doe.
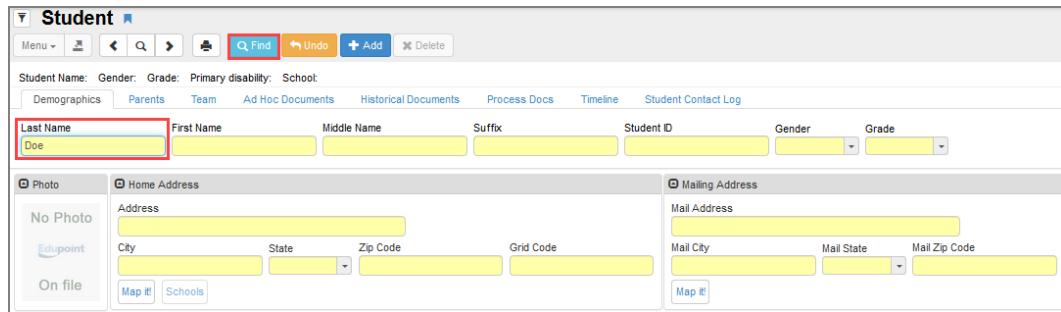
Student Screen

4. Scroll to find the other students with the same last name.

   - If the letters entered match the first part of a student's last name, that record displays if no record matches the exact letters entered. For example, if you entered *Doe* but no students have the last name Doe, a student named *Doerner* displays instead.

   - If the letters entered do not match the first part of a last name but they are contained in another last name, that name displays. For example, if you enter *Der* and no last names begin with Der, *Moldero* displays.

Autocomplete Search Lookups
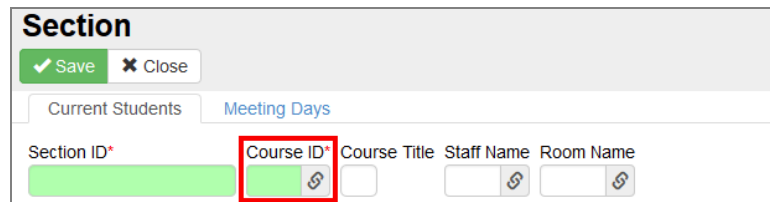
Synergy SIS contains an autocomplete feature for fields that rely on foreign key (FK) lookups. These are any fields that include a lookup icon ⛓ . Examples of these fields on the Section screen include the **Course ID**, **Staff Name**, and **Room Name** fields.

After clicking the field to enter information, the autocomplete window displays and suggests values for that field based on the characters entered by the user. The autocomplete window also allows you to open a Find window in Advanced Mode.

1. Navigate to a screen containing a FK field.
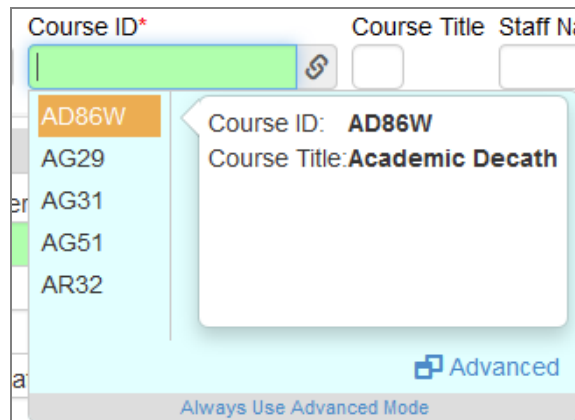
> The following example uses the **Course ID** field on **Synergy SIS > Schedule > Section**.

Section (Add) Screen

2. Select the field. A window opens displaying suggested values for that field.

Course ID Autocomplete

3. Enter characters into the field. Suggested values update as you type.
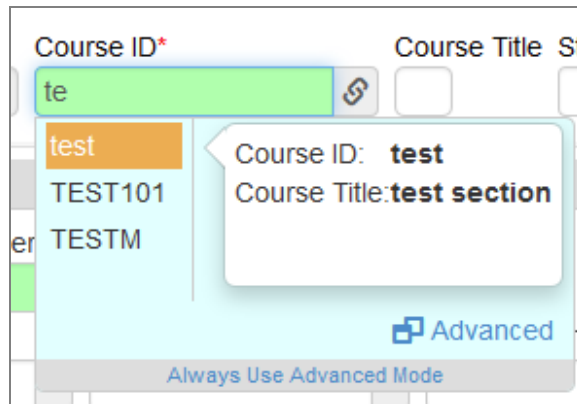
Updated Autocomplete Suggestions

4. Select a suggested value. This populates the data into the field.
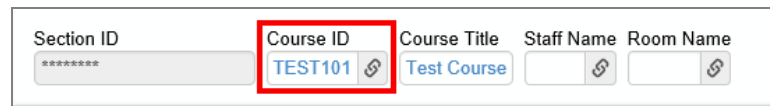
Autocomplete Populated Fields

Autocomplete Advanced Mode

Selecting Advanced Mode opens the Find lookup screen. The Find screen contains a toggle to enable or disable Advanced Mode when selecting the field.

1. Select the FK field.

> The following example uses the **Course ID** field on the **Synergy SIS > Schedule > Section** screen.

2. Click **Advanced** in the lower-right corner of the Autocomplete window. The Find screen opens.
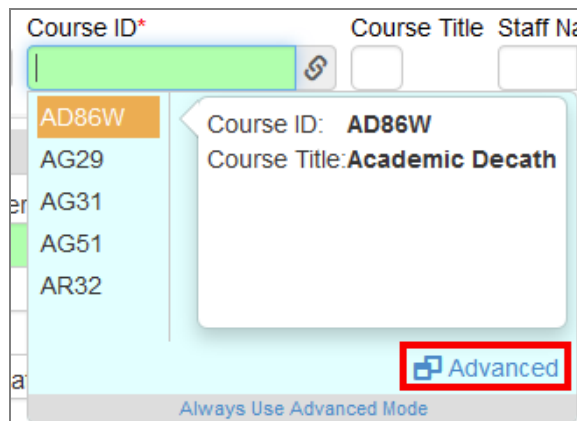
Course ID Autocomplete

3. Click the Toggle FK Advanced Setting icon in the top-right corner. The Find window displays for all searches when enabled.

Find: Course Screen
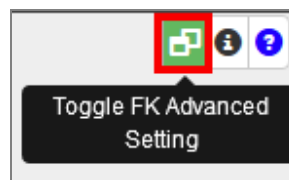
Advanced Mode Enabled

4. Click **Always Use Advanced Mode** in the Autocomplete window to open Advanced Mode for all FK fields.

Course ID Autocomplete

5. Disable the Toggle FK Advanced Setting icon to return to using autocomplete lookup.
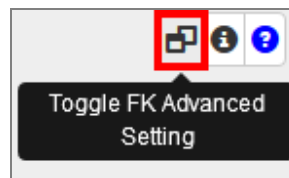
Advanced Mode Enabled

Searching Using Multiple Fields

In some cases, you may find it more effective to search for a student using more than one type of information. For example, there can be several students with the last name Smith.
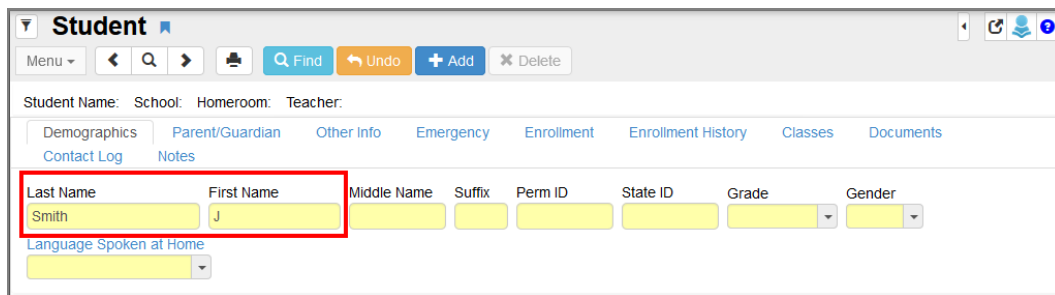
Using Keywords

1. Click 🔍 .

Student Screen

2. Enter all or part of the student's **Last Name** and all or part of the student's **First Name** on the screen.

Student Screen

3. Click **Find** or press Enter.

   - The first student who matches the last name and first name entered displays. For example, if you enter the last name *Smith* and only *J* for the first name, it pulls up *John Smith*'s record before *Juan Smith*'s record.

   - If the last name exists but no student has a matching first name, the first student whose first name contains the letters entered for the first name displays. For example, if you enter *Smith, R* but no student has a first name beginning with R, it pulls up *Harry Smith*'s records.

   - If no last name contains the letters entered, the next record closest to the searched name displays.

> Although you can complete any or all fields to search for a student, it is generally best to start with just the last name to see if matching records exist at all. You can then conduct other searches with additional information to narrow down the number of records.

Using Multiple Find Conditions

You can use multiple Find conditions for searches in any text or numeric field within Synergy SIS. Multiple find conditions can be used within multiple fields of the same screen. After entering the first portion of your search criteria, click the Plus (**+**) icon located in the top right corner of the field to bring up the condition options. The condition allows for *AND/OR* options. The condition term displaying in the field indicates the condition used.

1. Click the **Find** icon.

2. Enter the search criteria in a field . You can enter text with or without condition symbols. Examples include:

   - **(space)** – Used for blank values
   - **<** – Used for less than (Ex. *<Ke*, *<12/18/2017*)
   - **>** – Used for greater than (Ex. *> HY*, *>07/01/2017*)
   - ***** – Used as a wildcard for any value:

     - **Abb*** – Used for words that start with this prefix (Ex. *Abbott*)
     - ***liams** – Used for words that end with this suffix (Ex. *Williams*)

3. Click the **+** icon. The Condition window opens.

4. Select the appropriate condition.

   - *AND* is the default selection. Click the condition to change to *OR*.
   - Click **X** next to the value to delete the previous search criteria.

Condition Examples

5. Enter any remaining search criteria.

6. Click **Find** to display the Find Results.

Searching Using Find Result

As long as you enter some information in the primary field, Find mode always tries to match the criteria entered to search a specific record in the Synergy SIS database and bring up the record on the main screen. However, two other search methods can bring up a list of records where you can select the record manually.

The Find Result screen displays when you enter information in a secondary field and nothing in the primary field of the screen or when you use an asterisk in any field.

> Find screens close when you change the focus to a different school or node. The focus change does not affect any detached screens. The detached screens continue to return values based on the originating school focus.

Find Result

Actions | Open In Query | Edit Results

Query

Print | Output Type PDF

Filter

Save As Filter | Filter Name | ☑ Make Active

Students

◀ 1 2 3 4 5 6 7 ▶ 134 rows (176ms)

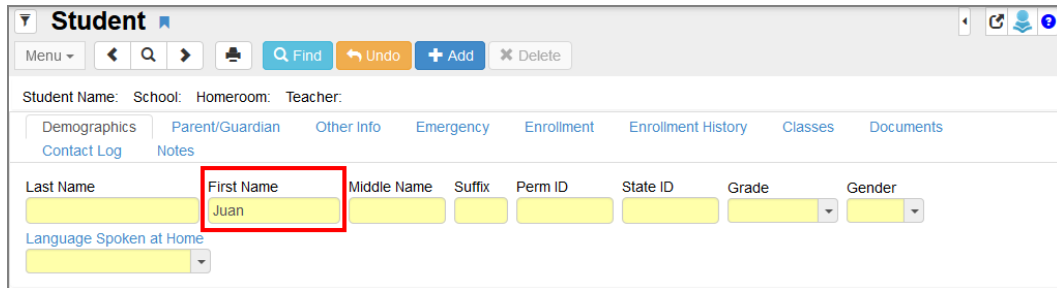| Line	Last Name	First Name	Middle Name	Perm ID	Ed-Fi ID	State ID	State Ethnicity	Custody	Grid Code
1	Aaron	Mary	Ellen	997097					M99AJ
2	Abbott	Billy	C	905483		0001341311	03		M99AJ
3	Abnernethy	Anne	Elizabeth	902870		0001247316	01		99999
4	Acevedo	Ashley		901830		0001230477	03		99999
5	Ackley	Brian	R	913948		0001346307	01		99999
6	Acosta	Eugene	A	873921		0001208627	03		M407A
7	Acosta	John	Alvarez	150265		0020901578	03		99999
8	Acunia	Kenneth	Ovante	110412		0001196474	03		M423D
9	Adair	Alan	William	871626		0001203066	01		M339A
10	Adair	Diane	N	903912		0001335347	01		99999
11	Adair	Timothy	S	888621		0001231272	01		M411A
12	Adams	Albert	Lee	889844		0001320886	01		99999

Find Result Screen

Search Using Secondary Fields

1. Click 🔍.
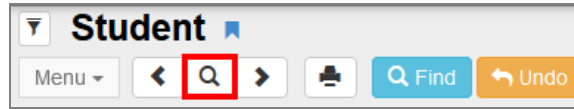
Student Screen

2. Enter all or part of the search criteria on any field or fields, on any tab, except the primary field. For example, enter the student's **First Name** to list all students with that first name.
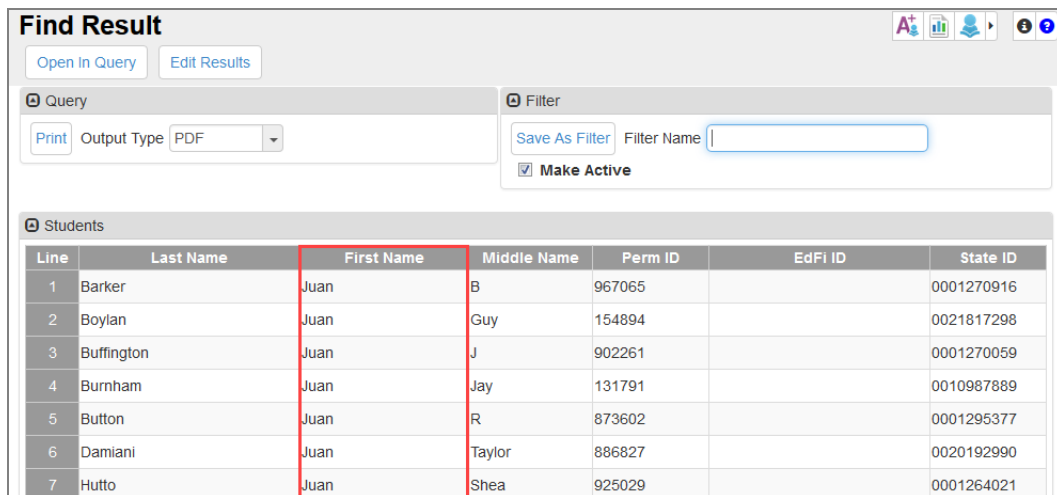

Student Screen

3. Click **Find** or press **Enter**. The Find Result screen opens listing all students that match the entered criteria.

> Find screens close when you change the focus to a different school or node. The focus change does not affect any detached screens, however. The detached screens continue to return values based on the originating school focus.

Find Result Screen

Search Using *

1. Click 🔍 .
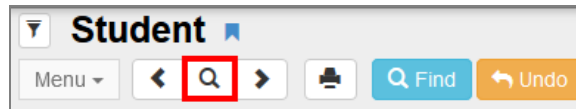
Student Screen

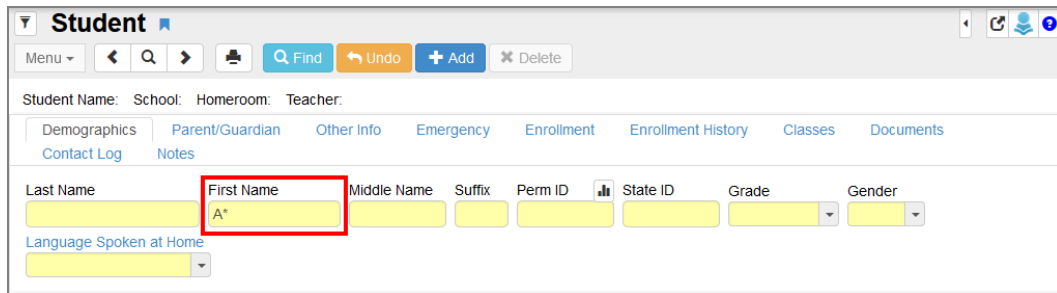2. Enter all or part of any field or fields on any tab. Then enter an asterisk (*) either in a field by itself or with the text in a field. For example, if you want to find all the students whose first name starts with A, enter *A* in the **First Name** field followed by an asterisk (*).

Student Screen

- The placement of the asterisk (*) in the field controls how the existing information entered in the field matches to the records.

    - If you place the asterisk (*) before the text, the text must match exactly in the field.

    - If you place the asterisk (*) after the text, it matches any records that start with that text in the field.

    - If you place the asterisk (*) in the middle of the text, the field must start with the text before the asterisk (*) and end with the text following the asterisk (*).

    - If you enter text in the primary field and enter only asterisks in any other field, the Find Result screen does not open. You must use at least one asterisk in a field with text to open the Find Result screen. You can also place asterisks in other fields to include them in the Find Result screen.

3. Click **Find** or press **Enter** to view the results. The Find Result screen opens listing all students who match the entered criteria.

> Find screens close when you change the focus to a different school or node. The focus change does not affect any detached screens, however. The detached screens continue to return values based on the originating school focus.

Find Result Screen

Selecting the Record

If more than one page of records match the criteria, the additional page numbers and number of total rows display at the top and bottom of the Find Result screen. The first page and last page numbers always display.

Find Result Screen

1. Click the page number to display a specific page. Click **>** to advance to the next page. Click **...** to see additional page numbers.

2. Hover your mouse over a page number to view the index of the records displayed on that page.

Find Result Screen

3. Click anywhere on the line of the student record. The line highlights and the information displays on the Student screen. Click anywhere on a different student record to highlight the line and display that student's record on the Student screen.

4. Double-click anywhere on the line to select a record. The Find Result screen closes.

> At the top of the Find Result screen, there is the option to save the results of the find criteria as a query or filter. See the *Synergy SIS – Query and Reporting Guide* for more information about using the Find Result screen to produce reports or filter the students displayed.
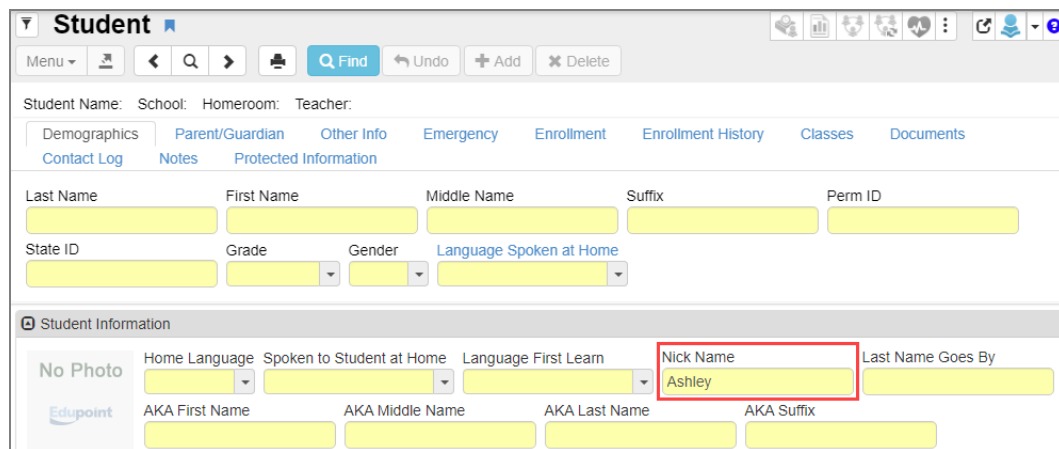
Loading Find Results Immediately

Find result displays the record immediately on any Synergy SIS screen when only one result is found.

This example uses the Synergy SIS Student screen to find a student.

1. Navigate to **Synergy SIS > Student > Student**.

2. Enter the search value in a field other than the fields in the tab panel. For example, enter *Ashley* in **Nick Name**.

> The fields in the tab panel display the search results as before.

Student Screen

3. Click **Find** or press the **Enter** key. The record displays on the Student screen since there is only one student with the **Nick Name** *Ashley*.

Student Screen

Searching Using Grids

Certain grids within Synergy SIS offer the ability to search for records using the fields inside. These grids display on multiple screens, including the Student, Section, and Health screens.

> Grids in Synergy SIS that do not support search functionality display the message: *This grid does not support search functionality* when in Find mode.
>
>
>
> *Student Screen, Parent/Guardian Tab*

Use any field type within a supported grid to enter or select data, including drop-downs and checkboxes. You can use multiple fields and special characters. Grid-based searches honor the current Focus and any Active View Filters.

> The following example uses the Phone Numbers grid on the Student screen.

1. Navigate to **Synergy SIS > Student > Student**.

2. Click to enter the Find mode.

3. Scroll to the Phone Numbers grid.

Student Screen

4. Select **Primary**.

5. Select *Cell* for **Type**.

> 💡 You can select multiple options in a drop-down.

Student Screen

6. Click **Find**. The Find Result screen opens.

7. Double-click the required result. The screen closes.

> Search results always include the following fields: **Last Name**, **First Name**, **Middle Name**, **Perm ID**, and fields specified in the search query.
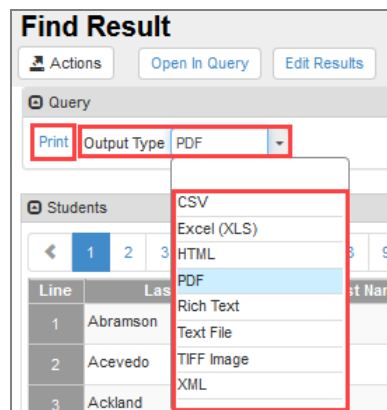

Find Result Screen

Printing or Exporting Find Results

You can print or export the search results from the Find Result screen.

1. Select an **Output Type**.

   - *CSV* – Comma separated values used by some 3rd party programs
   - *Excel* – Opens in an Excel spreadsheet
   - *HTML* – Hypertext markup language; identical to Find Results
   - *PDF* – Opens in PDF reader
   - *Rich Text* – Opens in MS Word
   - *Text File* – Tab separated fields used by some 3rd party programs
   - *TIFF* – Image of the first page
   - *XML* – Programming syntax

2. Click **Print**.

Find Result Screen

Using Filters

You can use Find Result to create a filter to apply to a screen. When a filter is applied, only the data that satisfies the filter criteria displays. A screen filter can make scrolling through records faster. Individual users can have an unlimited number of filters saved in the filter menu. Multiple filters can be active as long as they do not conflict.
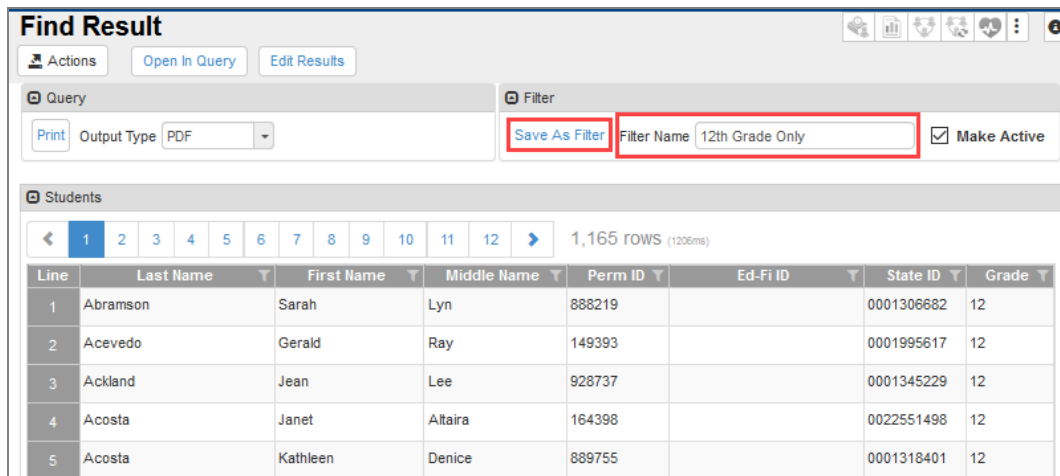
Creating a Filter

System filters are created from the Find Result screen using the **Save as Filter** button.

1. Enter the search criteria on the screen and click **Find**. In this example, *12* is selected for **Grade** on the Student screen.
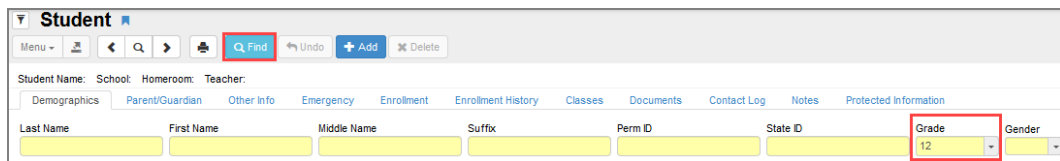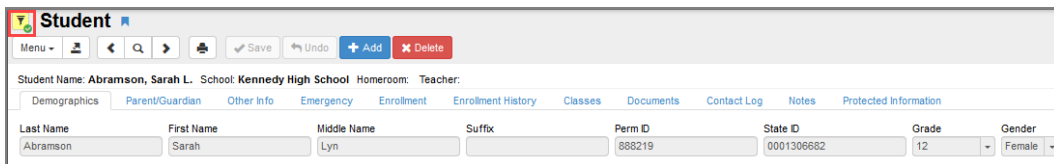

Student Screen

2. Enter a **Filter Name** in the Find Result screen that opens.

3. Click **Save As Filter**.

Find Result Screen

This applies the filter and the filter icon displays as yellow with a green checkmark .

Student Screen

> All functions performed while the filter is active only include those students who are part of the active filter.

Deactivating a Filter

Clicking the Filter icon displays a list of all of the user's previously saved filters. Filters with a checkmark are currently active.

1. Click the checkmark to remove it and to deactivate the filter.
2. Click **Save** to save and close the list of filters.
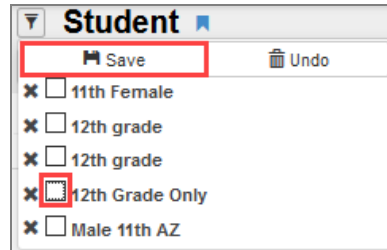
Student Screen

The Filter icon is gray when inactive. Click the icon at any time to view the list of filters.
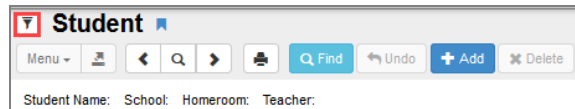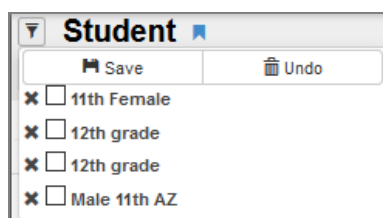
Student Screen

Deleting Filters

Clicking the Filter icon displays a list of all of the user's previously saved filters.

1. Click **X** to mark the filter for deletion. Synergy SIS adds a strikethrough to the filter and highlights the filter in pink.
2. Click **Save** to complete the deletion.
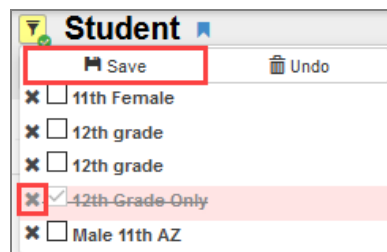
Student Screen

The screen refreshes and the deleted filter is removed from the list.
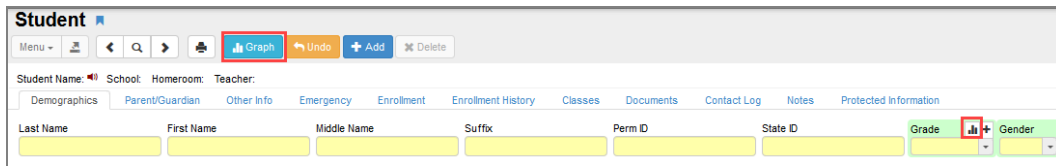
Student Screen

Creating Charts

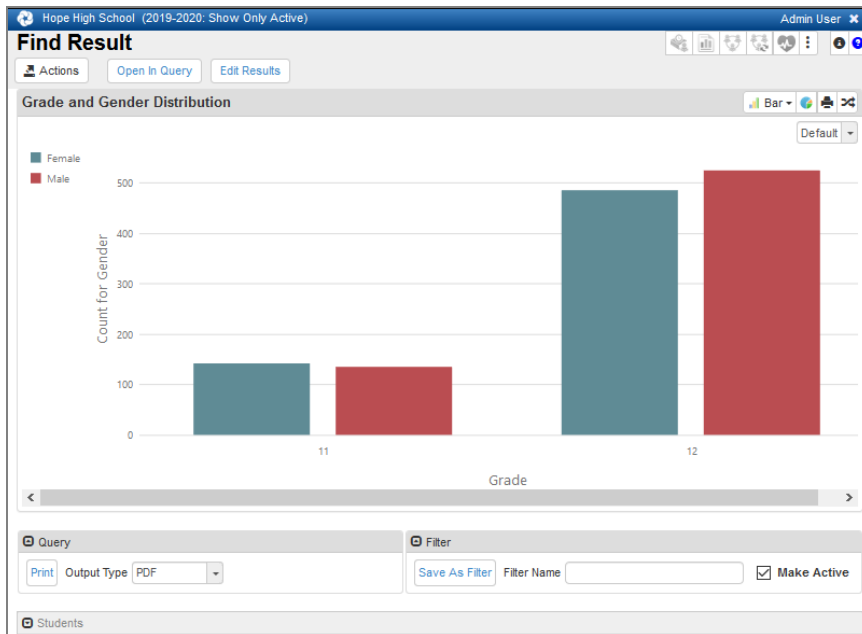You can create charts to view data in a visual format.

1. Hover over the field and click ⬛ (Toggle Graph Mode icon) for each data element to graph.

> 📄 The **Find** button changes to **Graph**, indicating Graph mode is turned on.
>
> The selected fields highlight in green.
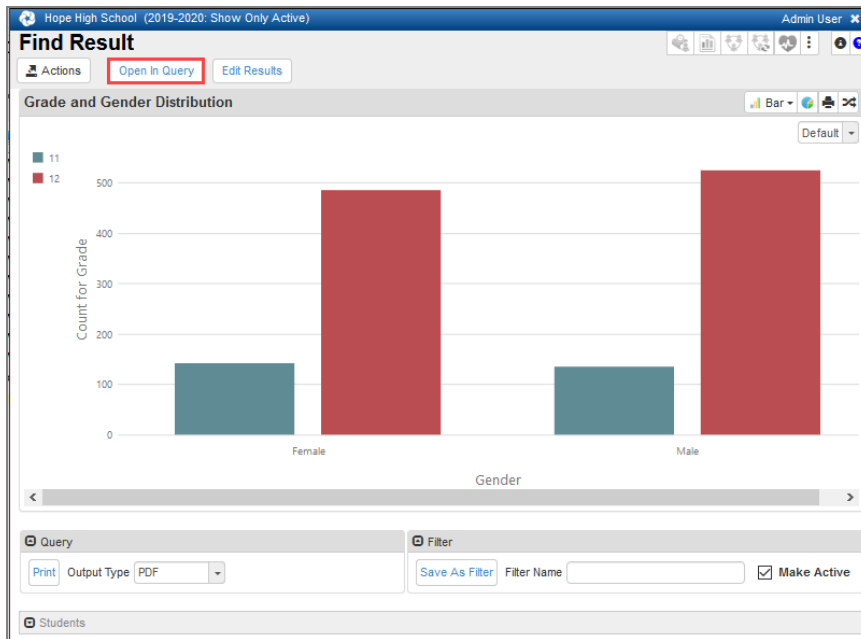
2. Click **Graph** to open the Find Result screen.

Student Screen

Find Result Screen

Creating a Query from the Chart

1. Click **Open in Query** to view your chart on the Query screen.
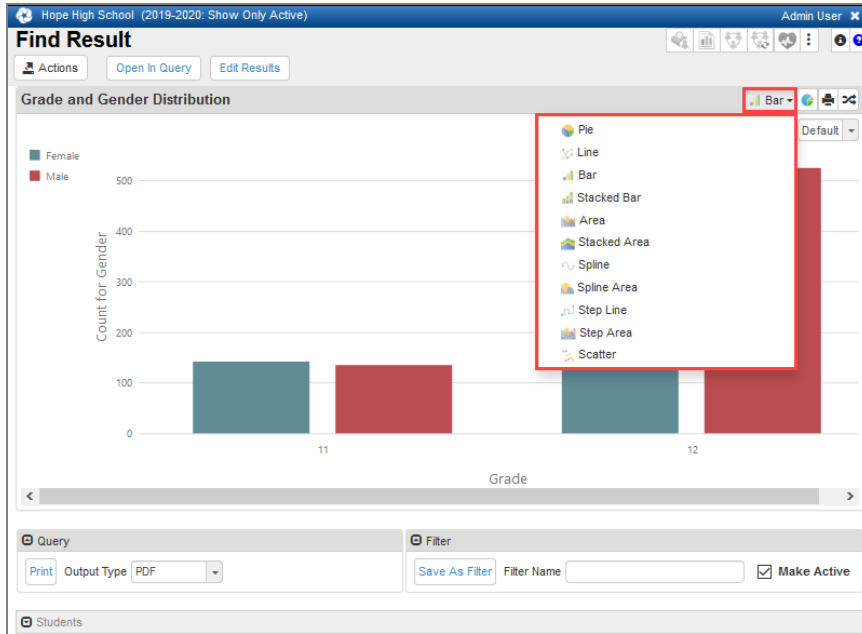

Find Result Screen

Query Screen

Changing the Chart Type

Bar chart is the default chart type and the type that displays when you click the icon for the first time. Any field you graph after changing the selected chart type displays in that chart type.

1. Select a different chart type from the chart menu to change it.

Find Result Screen

Saving to Dashboard Control

1. Click the Save To Dashboard Control icon 🌐 to open the Dashboard Control screen and save as a widget on the Synergy Dashboard.
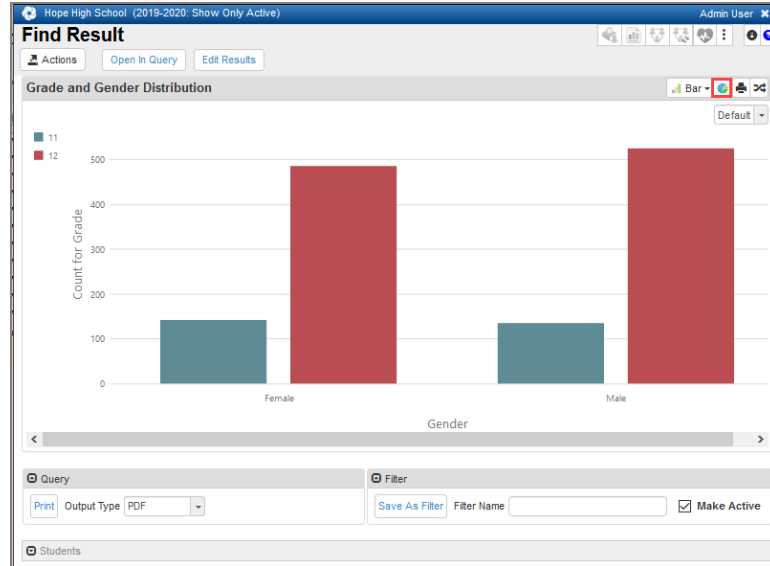
Find Result Screen

Dashboard Control Screen

Printing the Chart

1. Click the Print This Chart icon 🖶 to send the chart to a printer.
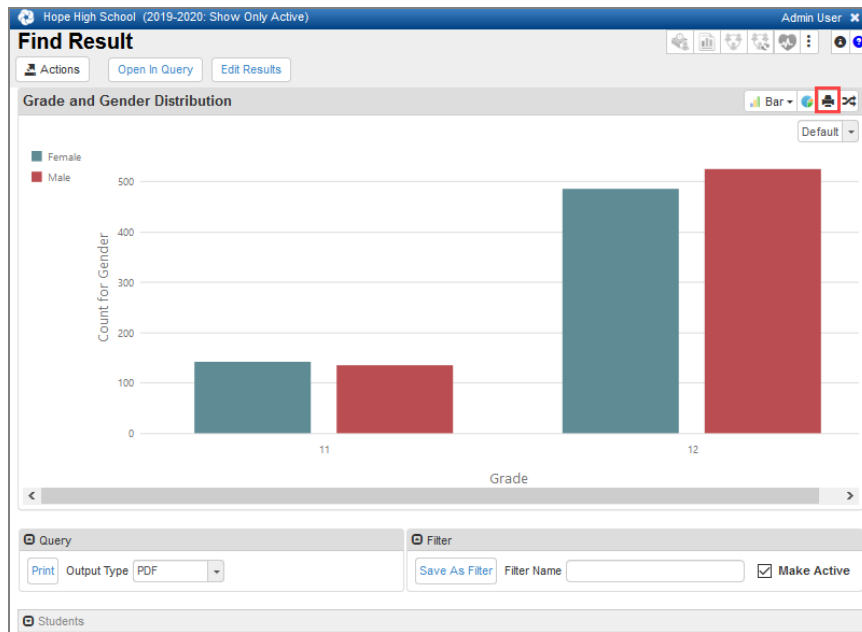
Find Result Screen

Inverting Series Results

1. Click the Invert Series Results 🔀 icon to switch the X and Y axes.
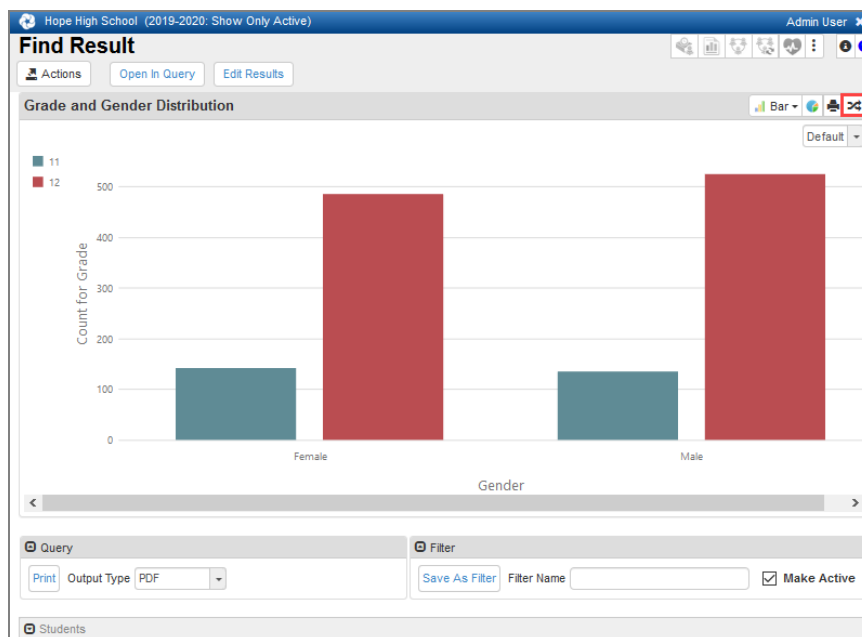
Find Result Screen

Changing the Color Scheme

You can change the color scheme of your chart using one from the predefined list or by creating a custom color scheme.

1. Select a different color scheme from the menu to change the selected color scheme.
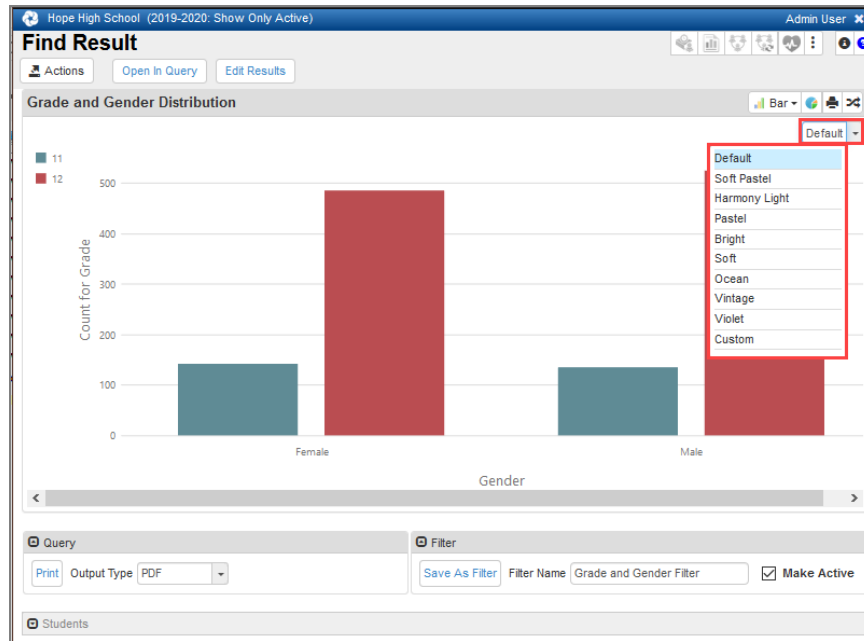
Find Result Screen

Printing the Find Results

1. Select the **Output Type**.

> All of the selections include a list of the students included in the data; however, not all of the selections include the chart in their output.

2. Click **Print**.

> Clicking **Print** displays the output on the screen; it does not send the output to a printer.
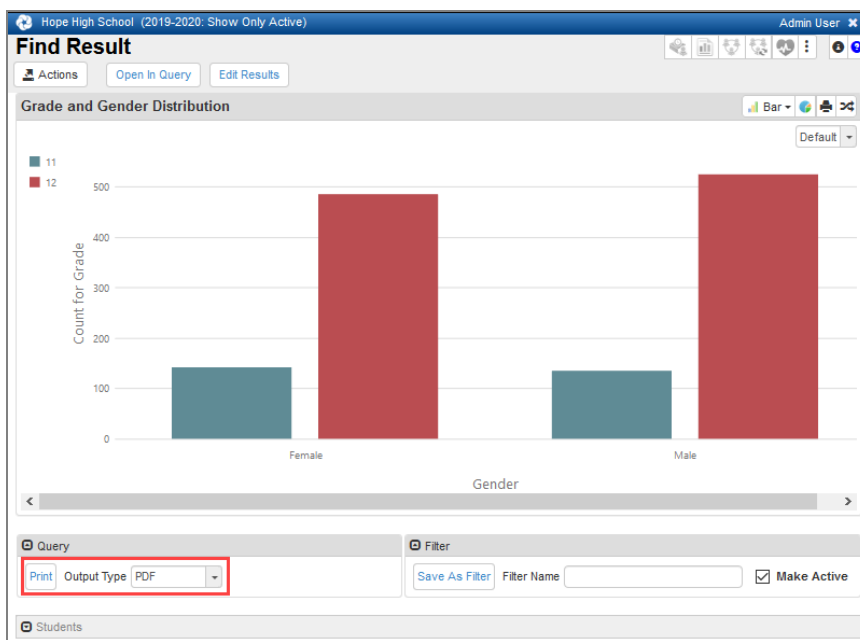
Find Result Screen

Creating Filters

You can create a screen filter based on your query results.

1. Enter a **Filter Name**.
2. Click **Save As Filter**.
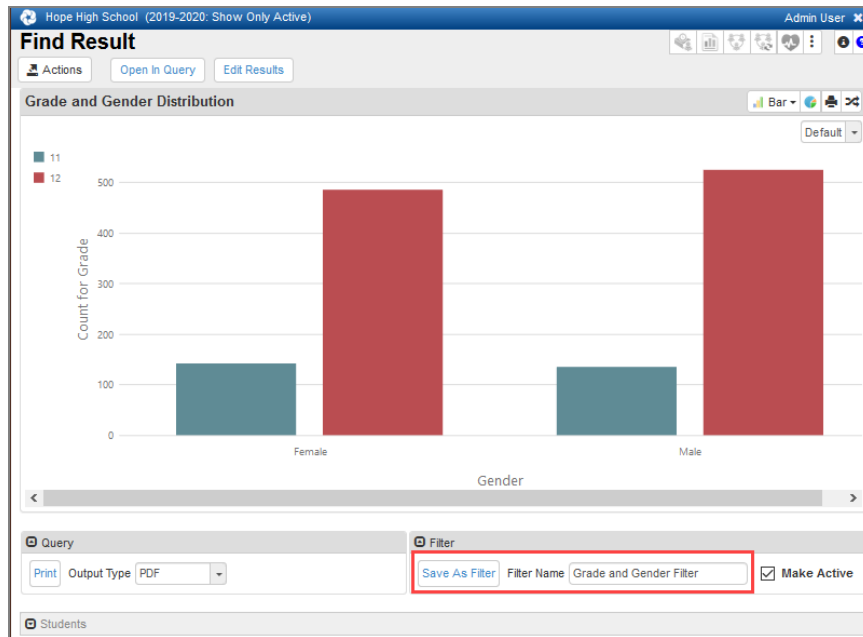
Find Result Screen

Viewing the Students Included in the Chart Results

1. Click the arrow [icon] in the Students section to open it and view the students included in the chart data.
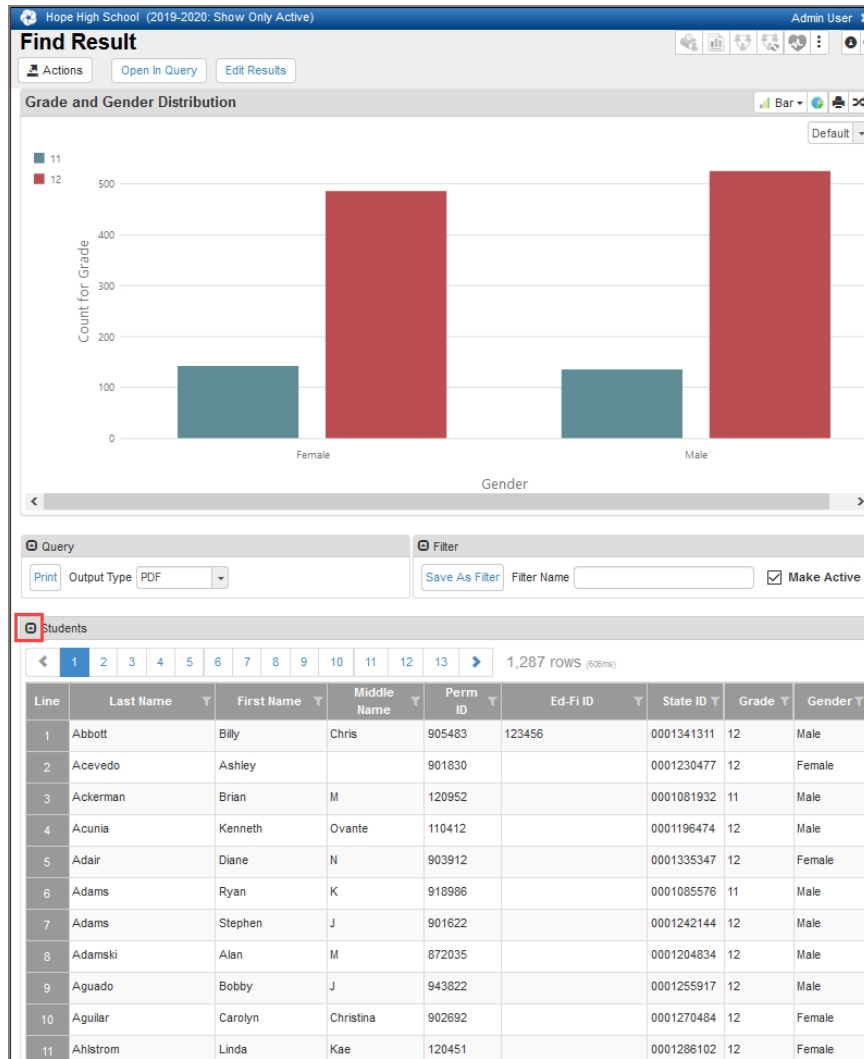
Find Result Screen

Searching Using Chooser

The Chooser screen allows you to search using one or more fields.

1. Click **Chooser** to open the Chooser screen.

Section Screen

The Chooser screen provides several search fields.

Chooser Screen

While the Chooser screen is open, you can view the screen behind it by hovering over the area above the Chooser screen.
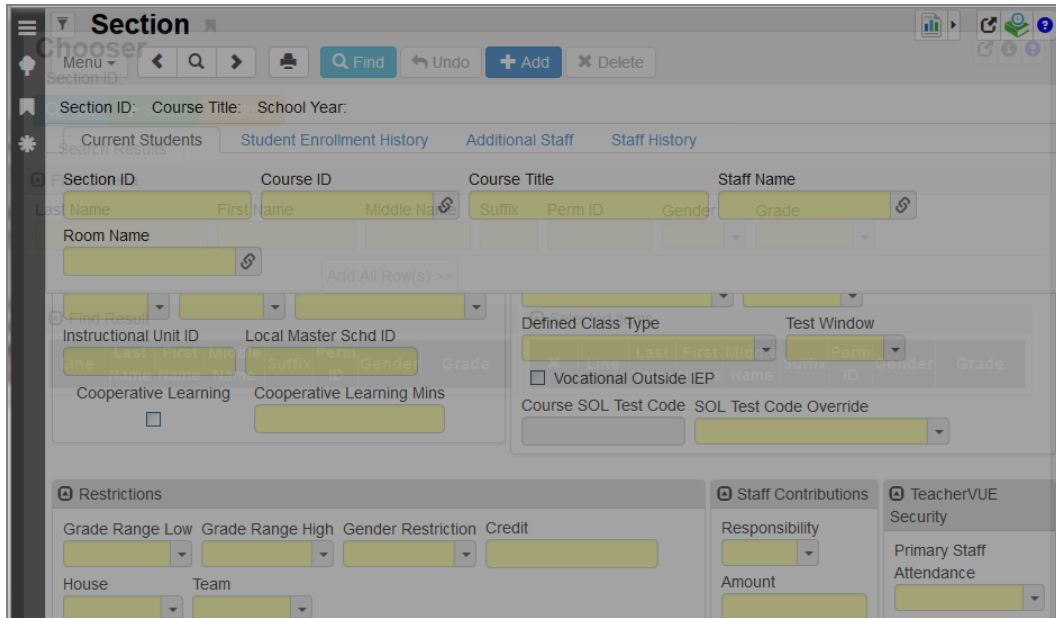
Transparent Chooser Screen

2. Click Q Find or press **Enter** to search for the entry in the database. As with other searches, starting with less information is best. The results display in the Find Result section.
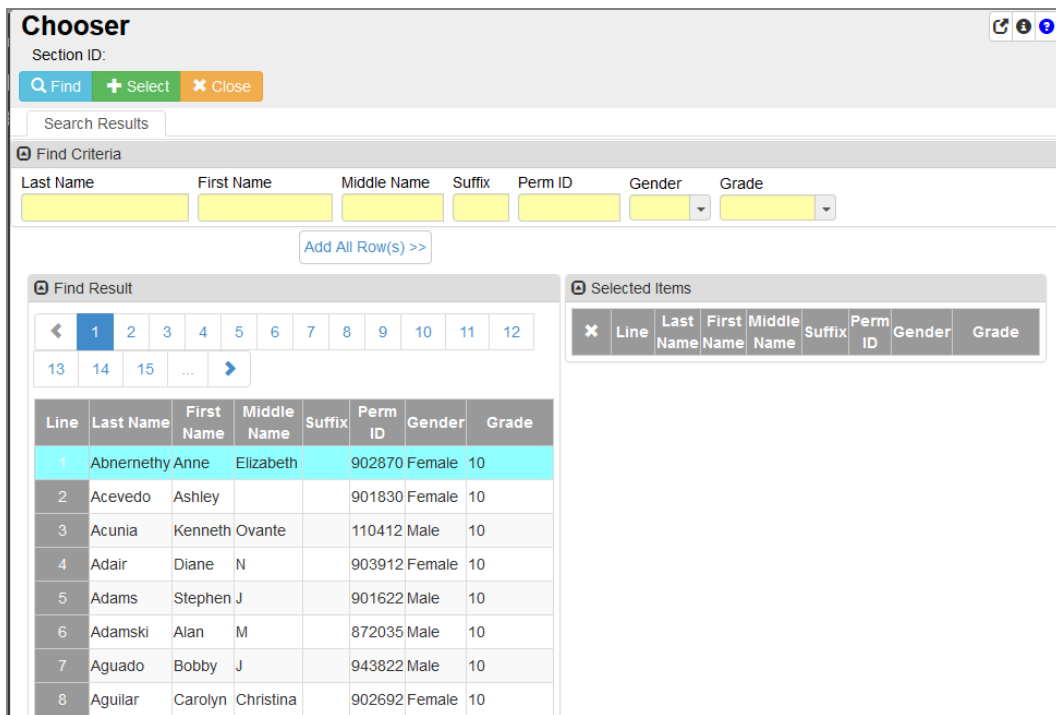
Chooser Screen

3. Click an item to move it from the Find Result section to the Selected Items section or click Add All Row(s) >> to add all the items in Find Result to Selected Items.

4. Select [×] to delete a record from the Selected Items section if needed.

> 📄 You can search multiple times until you find all records and add them to the **Selected Items** section.

Chooser Screen

> 📄 Select [⤢] in the top right corner to pop out the Chooser screen to move and resize it as needed. Select [▬] to return the window to the main screen.

5. Click [✔ Select] to add the items to the screen. The Chooser screen closes and returns you to the previous screen, which reflects the additions you made.

6. Click [✕ Close] to return to the previous screen if you decide not to add any items and not to save any changes you made on the Chooser screen. The record does not change.

Synergy How-To

Use Keyboard Shortcuts

These keyboard shortcuts allow you to move quickly through the screens in Synergy SIS, particularly when entering a large amount of records.

Combination Keys	Action
Control + A	Add
Control + S	Save
Control + D	Delete
Control + F	Find
Control + Z	Undo
Control + Q	Sign Out
Control + Right Arrow	Scroll Fwd 1 Record
Control + Down Arrow	Scroll Fwd 1 Record
Control + Left Arrow	Scroll Back 1 Record
Control + Up Arrow	Scroll Back 1 Record
Up Arrow	Scroll Up (screens/lists)
Right Arrow	Scroll Up (lists)
Down Arrow	Scroll Down (screens/lists)
Left Arrow	Scroll Down (lists)

Use the Find Foreign Key

The Find Foreign key opens a Find screen to locate records.

1. Click [icon] in a field to open the Find: screen.

2. Enter partial or complete data in any field in the Find Criteria section.

3. Click **Find** or press the **Enter** key. The Search Result displays a list of records matching the criteria entered.

4. Click anywhere on the appropriate record to highlight.

5. Click **Select**. The Find screen closes and the record selected displays in the field.

> Find screens close when you change the focus to a different school or node. The focus change does not affect any detached screens, however. The detached screens continue to return values based on the originating school focus.

Find: Staff Screen

Enter Dates

You can enter dates by typing the numerals of the dates. For example, typing 052215 and pressing the **Enter** key results in 05/22/15.

You can also click ![calendar icon] and select the date. Today's date is highlighted in blue.
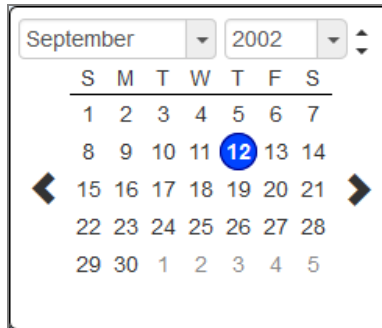
Synergy SIS Calendar

Enter Time

You can enter the time by typing the numerals of the time. The system formats the field once entered. For example, 900 formats as 9:00 AM. You can also click ![clock icon] and select the time.
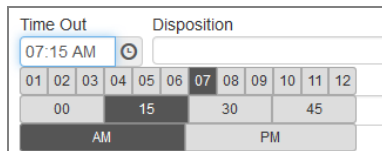
Synergy SIS Clock

Formatting Window

Certain screens in Synergy SIS contain text editors where you can enter custom text or HTML, such as the Email Content screen found in **Synergy SIS > System > Setup**.
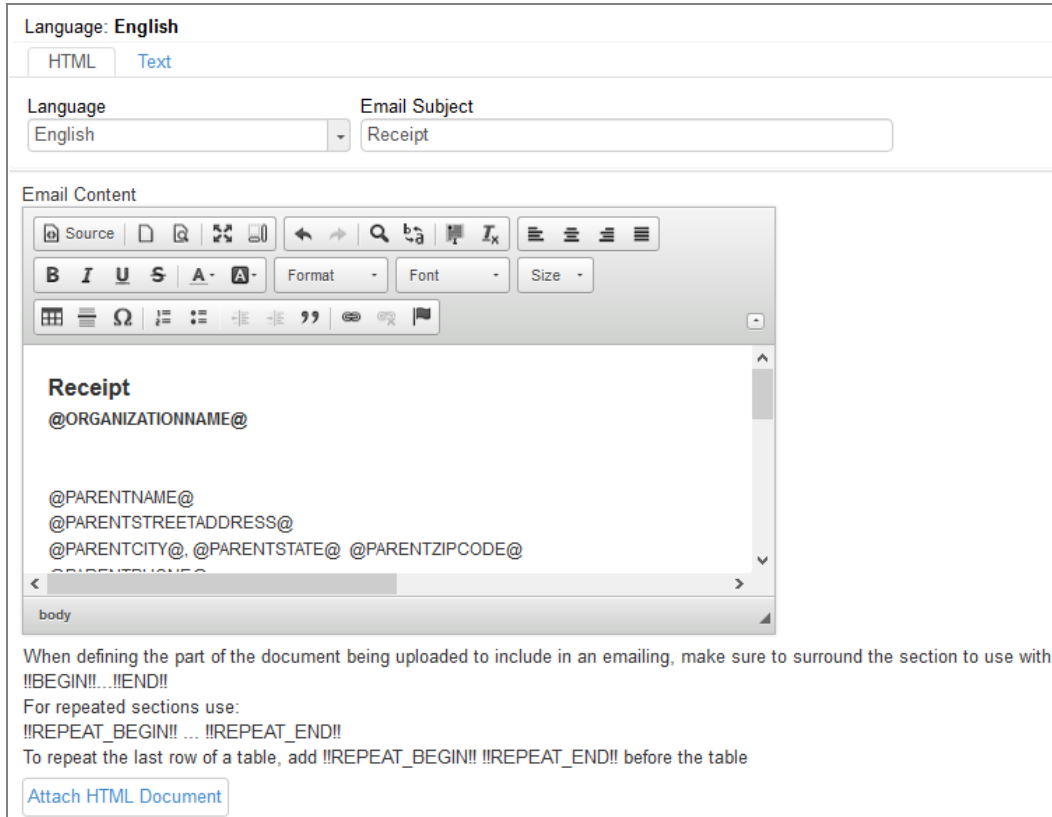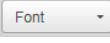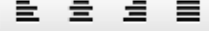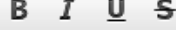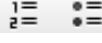
Formatting Window

- **Source** – Toggles the view between What You See Is What You Get (WYSIWYG) and HTML editing mode

> HTML tags display when in HTML editing mode, such as *<p>* or *<b>*. For example, a heading using the *Heading 1* style would display *<h1>Heading</h1>*.

- **New Page** – Clears unsaved changes

- **Preview** – Previews the template design

- **Maximize** – Maximizes the editing window

- **Show Blocks** – Shows block-level elements

- **Cut**, **Copy**, and **Paste**

- **Paste as Plain Text** – Pastes the text as plain text with no formatting. This is helpful when copying from other programs which may have hidden HTML formatting, such as other web pages or Microsoft Outlook.

- **Paste From Word** – Inserts text copied from Microsoft Word and allows you to edit the text to remove special HTML code that Microsoft Word inserts.

    1. Paste the text in the pop-up box.
    2. Select the box to **Remove Styles definitions**.
    3. Click **OK**.

- **Undo/Redo** – Undo or redo the last action

- **Find** – Searches for text

- **Replace** – Replaces text

- **Select All** – Selects all content in the formatting window

- **Remove Format** – Clears all formatting for the selected text

- **Text Style** – Select a built-in format for the selected text.

- **Font** – Select a font for selected content.

- **Size** – Select a font size for selected content.

- **Text Color**

- **Background Color**

- **Align Left**, **Center**, **Align Right**, or **Justify**

- **Bold**, **Italic**, **Underline**, or **Strikethrough** – Formats the selected text as bold, italic, underline, or strikethrough

- **Table** – Inserts a table

- **Insert Horizonal Line** – Inserts a horizontal line

- **Insert Special Character** – Inserts a special character such as a copyright mark or currency symbol

- **Insert Numbered/Bulleted List** – Format the selected paragraphs as numbers or bullets.

- **Increase/Decrease Indent, Outdent** – Indent or outdent the selected paragraph.

- **Blockquote** – Indents the paragraph on both sides

- **Insert/Remove Hyperlink** – Insert or remove a link to a website or email address.

- **Anchor** – Inserts a place that you can link to inside the template

Pasting Lists from Text Editors

You can paste a list of data copied from an Excel file and most text editors such as a list in a table, list separated by returns, commas, or tabs into the search fields in Synergy to search for multiple criteria.

Student Name Example

The following example uses the Student screen and Excel to search for students with a list containing 16 names.

1. Copy the selected first names from the Excel file.

	A	B	C
1	Adam	Smith	
2	John	Jones	
3	Nathan	Michaels	
4	Mark	Lilly	
5	Andrew	Adebayo	
6	Thomas	Flynn	
7	Tom	Harms	
8	Michael	Houston	
9	Jesse	Williams	
10	Joe	Abrams	
11	Ming	Huffman	
12	Will	Bailey	
13	William	Adams	
14	Liam	Ahmed	
15	Chris	Singh	
16	Christopher	Tsai	
17	Mike	Yokohama	
18	Louis	Takei	

Excel Spreadsheet

2. Navigate to **Synergy SIS > Student > Student**.

3. Paste data into the **First Name** field.

> You can paste lists containing an apostrophe or hyphen.
>
> You can paste number and date lists.
>
> Replace the criteria by pasting a list into the same field.

Student Screen

The names display in a condition field.

The search fields on a screen containing a list highlight in a green background.

Click [OR ▸] to toggle the condition from OR to AND. OR is the default condition when pasting lists.

Click ✖ to remove an item from the list.

The search list collapses when you move to another field. Click a green field to re-display the list.

Enter a keyword and click + to add a criterion to a pasted list.

All the criteria are removed when you navigate to another screen or click 🔍 .

Student Screen

4. Click **Find** to open the Find Result screen that displays the list of students whose first names match with the search list.

Find Result Screen

> 📄 When you paste a list into a field on the Chooser screen, the results automatically display in the Selected Items section.

Student ID Example

The following example uses the Student screen and Excel to search for students with a list containing 16 IDs.

1. Copy the selected IDs from the Excel file.

Excel Spreadsheet

2. Navigate to **Synergy SIS > Student > Student**.
3. Paste data into the **Perm ID** field.

Student Screen

The names display in a condition field.

The search fields on a screen containing a list highlight in a green background.

Click ⌈OR ›⌉ to toggle the condition from OR to AND. OR is the default condition when pasting lists.

Click ✖ to remove an item from the list.

The search list collapses when you move to another field. Click a green field to re-display the list.

Enter a keyword and click + to add a criterion to a pasted list.

All the criteria are removed when you navigate to another screen or click 🔍 .

Student Screen

4. Click **Find** to open the Find Result screen that displays the list of students whose first names match with the search list.

Find Result Screen

> When you paste a list into a field on the Chooser screen, the results automatically display in the Selected Items section.

List Options

When selecting from long drop-downs, Synergy SIS provides three different options that determine the behavior of the match when a user uses the keyboard to locate a value. Your system administrator selects only one of these options. The values entered display in red.

Match Items by a Single Letter

Synergy SIS matches only the first letter of the values based on the letter entered. For example, if you enter *M*, the values beginning with *M* display.
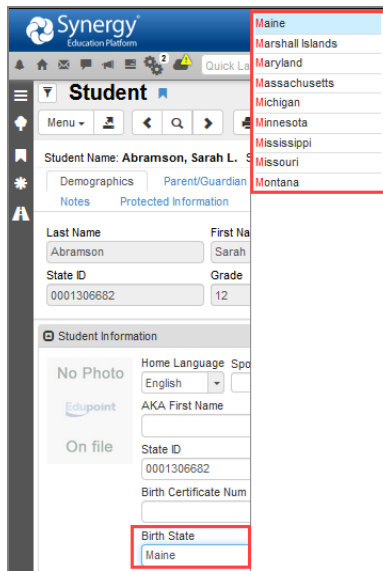
Student Screen, Match Items By A Single Letter Example

If you then enter *I*, the values beginning with *M* clear and the values beginning with *I* display instead.
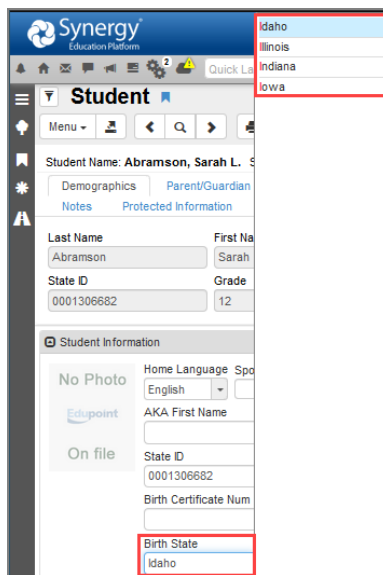
Student Screen, Match Items By A Single Letter Example

Match Items by a Sequence of Letters

Synergy SIS matches to a sequence of letters. If you enter *M*, then *I* in a state list, Maine (the first M state) and then Michigan (the first MI state) are selected.
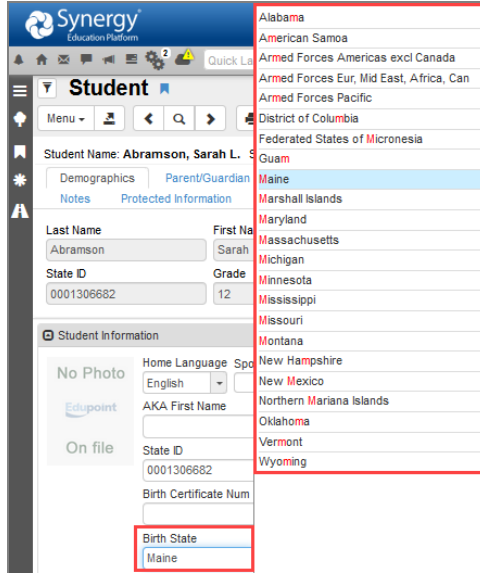
Student Screen, Match Items By Sequence Of Letters Example
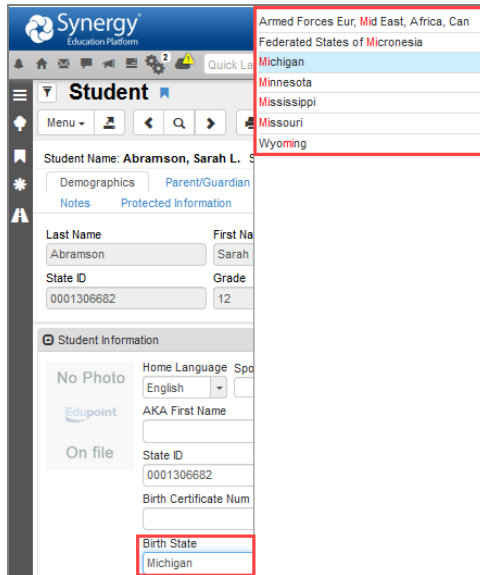
Student Screen, Match Items By Sequence Of Letters Example

Hybrid Match Strategy

Synergy SIS matches by the last character typed if the sequence typed has no match. If you enter *M*, then *E*, then *S* in a state list, the values Maine (the first M state), then American Samoa (the first ME state), then South Carolina (the first S state) are selected.
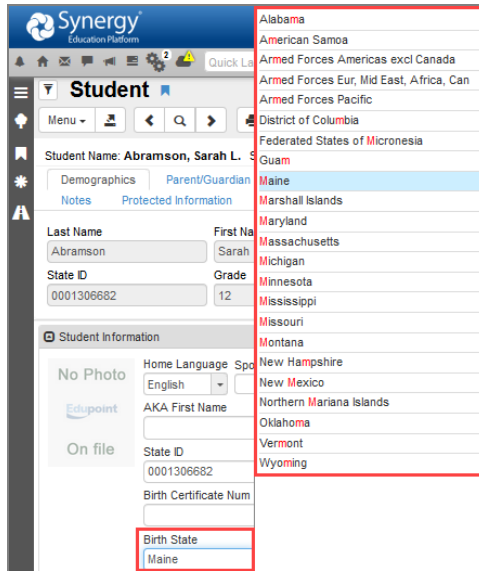
Student Screen, Hybrid Match Strategy Example
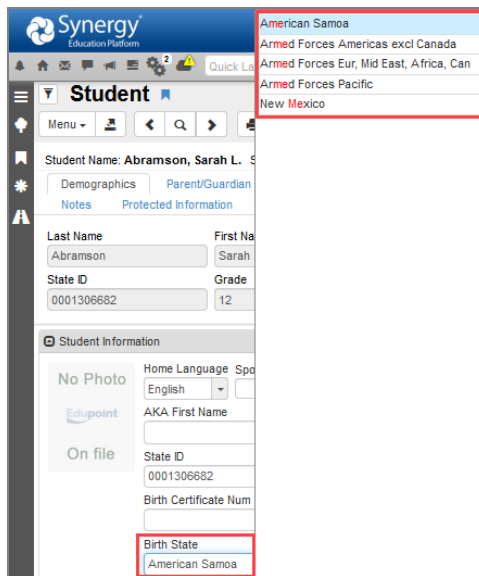
Student Screen, Hybrid Match Strategy Example
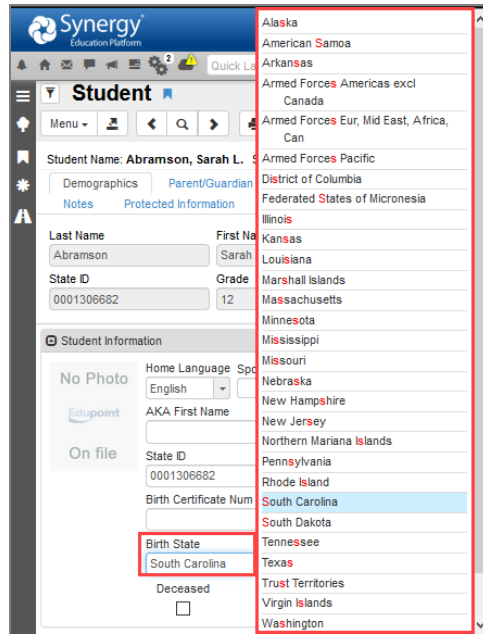
Student Screen, Hybrid Match Strategy Example

Chapter 4:
Your Synergy SIS Account

Managing Your Synergy SIS Account

There are several areas where you can customize your account if your security settings in Synergy SIS allow for it. You can change the home page, set up a custom dictionary for spell checking, and edit your address and phone information at **Synergy SIS > User Preferences > User Profile**.

User Profile Screen

Your User Profile

The first tab of the User Profile screen is the **Demographics** tab. This tab displays the email associated with your login, your address, phone, and preferences. It also provides a place to change your password if needed.

- Any white field can be edited directly on the screen.
- Enter a new password in **Password** and **Confirm Password** to change your Synergy SIS password if you are not using your network account.

User Profile Screen

Setting Preferences

User Profile Screen

Setting the Default Mode

Select *Inquiry* or *Edit* to set the **Default Mode** used when looking at a screen in Synergy SIS.

- In the *Inquiry* mode, all screens are set to read-only. You can still edit records by clicking **Edit** at the top of the screen, but the records return to read-only mode when you select a new screen.

- *Inquiry* mode can help prevent accidental edits to records, but can add an extra step for data entry personnel who constantly edit records.
- *Edit* mode, which opens screens for updating, might be a better choice.

Setting the Paging Size and Paging Row Size

To increase the **Paging Size** and **Paging Row Size** settings so that advancing through records takes fewer pages to load:

1. Enter a **Paging Size** number to change the number of pages displayed at the bottom of a search. The default is 15.
2. Enter a **Paging Row Size** number to change the number of records displayed on one page. Default is 20 rows.

> This may slow the search slightly as more records are returned.

3. Select **Show Quick Launch** to display the Quick Launch in the Title Bar.

Setting Your Home Page

The POV Home Page is the initial screen displayed in the Content Area when you first log in to Synergy SIS. This is the default Synergy SIS home page and displays announcements, a task list, and the dashboard widgets.

1. Click **Change POV Home Page** to change this page to another screen. The UserPADTreeFind screen opens.
2. Navigate to the appropriate screen as you would navigate the Synergy PAD Tree.
3. Click **Select**. The UserPADTreeFind screen closes and the screen name displays in **POV Home Page**.
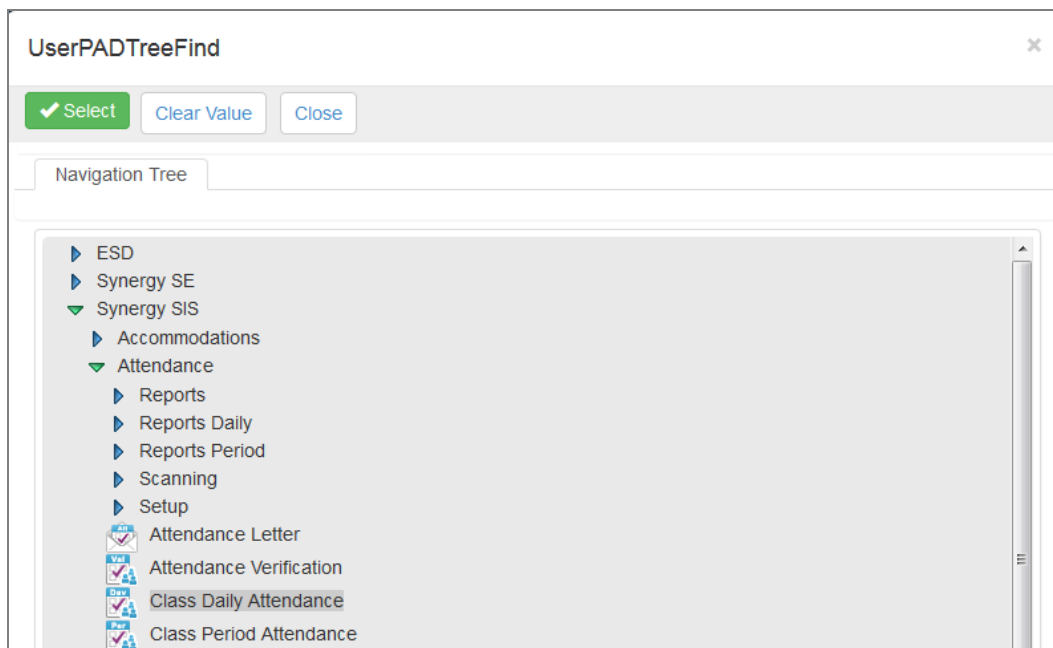
UserPADTreeFind Screen

Adding a New Phone Number

1. Click **Add** in the Phone Numbers section.

2. Select the **Primary** phone number used to contact you.

3. Select the **Type** of phone and enter the **Phone** number. Enter the **Extension** if appropriate.

   - Select **Contact** if this phone number can be used to contact you.

   - Select **Listed** if the number is listed in the phone directory.

4. Click **Save**.

✖	Line	Primary ⬍	Type ⬍	Phone ⬍	Extension ⬍	Contact ⬍	Listed ⬍
☐	1	☑	Cell ▾	480-555-1234		☑	☑

User Profile Screen

Editing the Navigation Menu

Add a New Toolbar

You can modify custom toolbars on the **Navigation Menu** tab of the User Profile screen. Make sure nothing is selected (highlighted) under the Navigation Menu. If it is, click refresh.

Synergy SIS Refresh Button

1. Select *Add Group* from the **Actions...** menu. The Add New Group screen opens.

User Profile Screen, Navigation Menu Tab

2. Enter a **Name** for the toolbar and click **Save**. The new group displays in the Navigation Tree.

Add New Group Screen

3. Select the **Line** of the group to highlight it and adjust the new group order.
4. Click **Move Up** or **Move Down**.
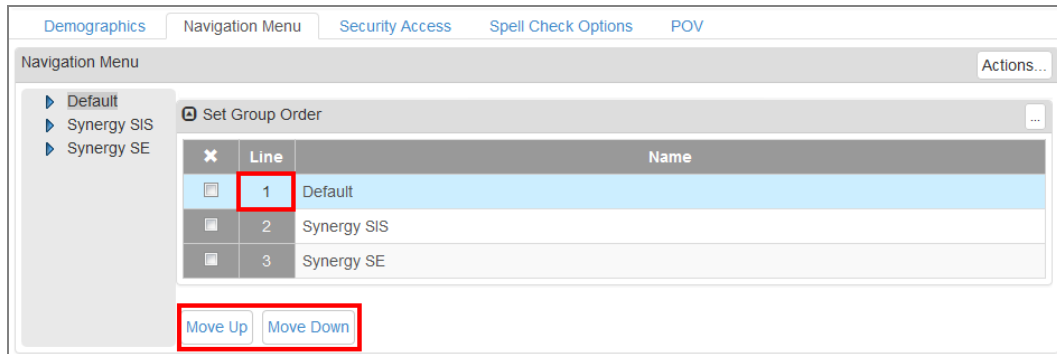
User Profile Screen, Navigation Menu Tab

5. Repeat as needed.

Removing a Group

1. Select on line of record to delete.
2. Click **Save**.

Add Screens, Reports, and Links to a Group

1. Select the Group name under the Navigation Menu. The name highlights.
2. Click **Actions…** and select an option. A new screen opens based upon your selection.
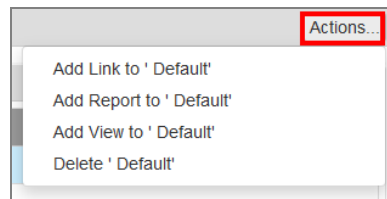
User Profile Screen, Navigation Menu Tab

3. Select a **View Lookup** option to add.
4. Click **Save** to add the item. The screen closes and the new item (screen, report, or link) displays under the Group.

> TeacherVUE screens must be added for TeacherVUE users only. TeacherVUE screens display (*K12.TXPInfo*) following the name of the screen.

Set Item Order

You can adjust the order of multiple items in a Group the same way as groups.

View Security Settings

The **Security Access** tab displays some of the security assigned to your account. You probably cannot change this information.

User Profile Screen, Security Access Tab

Spell Check Options

Customize the spell checker to meet your needs.

1. Select the **Spell Check Options** tab.

2. Select or deselect spell check options as needed in the Options section.

User Profile Screen, Spell Check Options Tab

Adding Custom Words to the Dictionary

You can also add custom words to the standard dictionary. For example, you might want to add the name of the district and/or schools.

1. Click **Add** in the Custom Word List section. A new line displays.

2. Enter the new **Word**.

3. Click **Save**.

User Profile Screen, Spell Check Options Tab

POV

Dashboard Controls and Widgets

> See Customizing the Dashboard and Overview of Dashboard Widgets for more information on setting up the dashboard and widgets.

Task Setup

Tasks provide a to-do list on the home page of Synergy SIS. For example, there might be a reminder task for the health office to administer medication to students or a notification to review demographic updates submitted by parents using ParentVUE. The tasks that display may vary upon the user's group and individual user preferences. Some tasks automatically display daily and cannot be removed from the list. Others are a one-time occurrence that the user can remove from the list.

Home Screen

Display a Task List

1. Select **Show Task List**.

2. Select the tasks to display as needed. This list is customized by your school district.
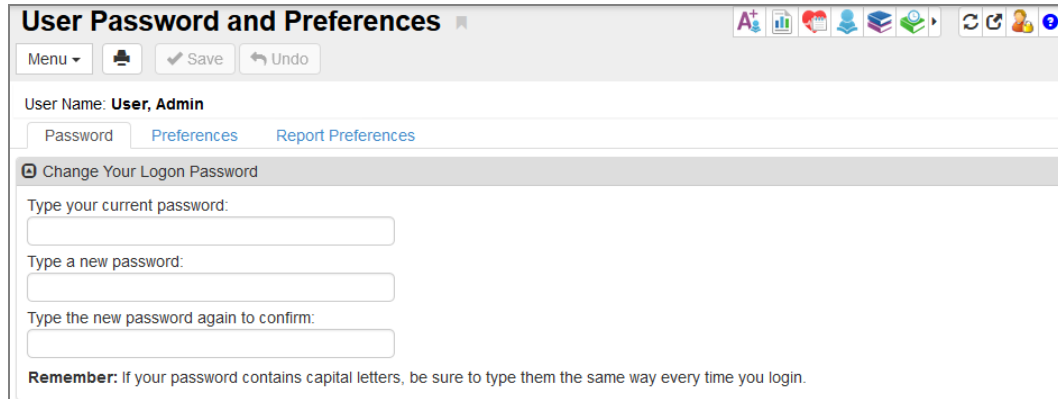
User Screen, POV Tab

3. Click **Save**.

Your Password and Preferences

In addition to using the User Profile screen, you can also modify your Synergy account on the User Password and Preferences screen.

1. Navigate to **Synergy SIS > User Preferences > User Password and Preferences**.
2. Follow the instructions to change your login password.

User Password And Preferences Screen

3. Click **Save**.

Preferences

Use the **Preferences** tab to customize the number of pages displayed in a search, the number of records displayed on a page, to change the POV Home Page, and your preferred login application if available.

User Password And Preferences Screen, Preferences Tab

Changing the Number of Records Displayed on One Page

1. Enter **Paging Size** number to change number of pages displayed at the bottom of a search. Default is 15 pages.

2. Enter **Paging Row Size** number to change number of records displayed on one page. Default is 20 rows.

Changing Your Home Page

The POV Home Page is the initial screen displayed in the Content Area when you first log in to Synergy SIS. This is the default Synergy SIS home page and displays announcements, a task list, and the dashboard widgets.

1. Click **Change POV Home Page** to change this page to another screen. The UserPADTreeFind screen opens.

2. Navigate to the appropriate screen as you would navigate the Synergy PAD Tree.

3. Click **Select**. The UserPADTreeFind screen closes and the screen name displays in **POV Home Page**.
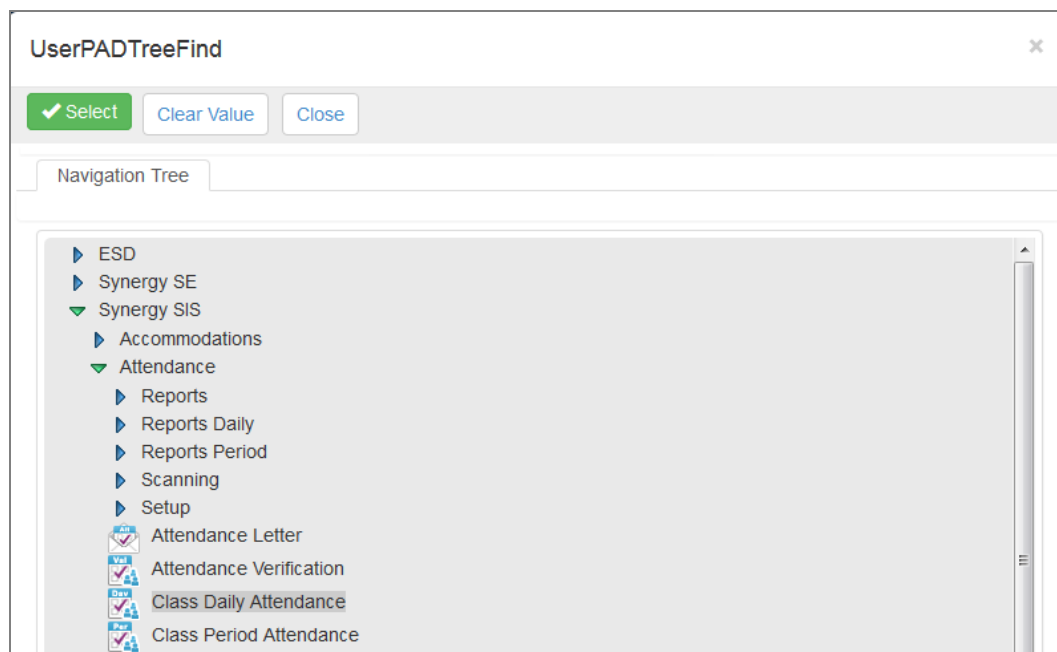
UserPADTreeFind Screen

Changing Initial Application

If you have access to both TeacherVUE and Synergy SIS, you can select which application opens first in the Log In Preferences section.

1. Select the **Preferred Application To Log Into**.

2. Click **Save**.

Report Preferences

1. Select the **Report Preferences** tab to modify your report preferences.

User Password And Preferences Screen, Report Preferences Tab

2. Select the report profile preferences, as needed.

   - Select **Mask Phone Numbers** to mask unlisted phone numbers on reports.
   - Select **Use Custom Acknowledgment Text**.
   - Enter a **Custom Acknowledgement Text**.

> IDS801 Preferences refers to the printable Disciplinary Action Form located in the Discipline Incident module. The form contains a customizable acknowledgement statement in the Signature box.

User Password And Preferences Screen, Report Preferences Tab

3. Click **Save**.

Setting Checklist Security

The **Checklists** option can be hidden from all but authorized users using PAD Security.

1. Navigate to **Synergy SIS > System > Security > PAD Security**.

2. Navigate to **Synergy SIS > User Preferences > ST_Content.aspx** in Product Access Definition Security.

3. Select *Public* in **User Group Name**.

4. Click **Show Detail**.

5. Select *No* for *NAV: Checklists*.

6. Click **Save**.
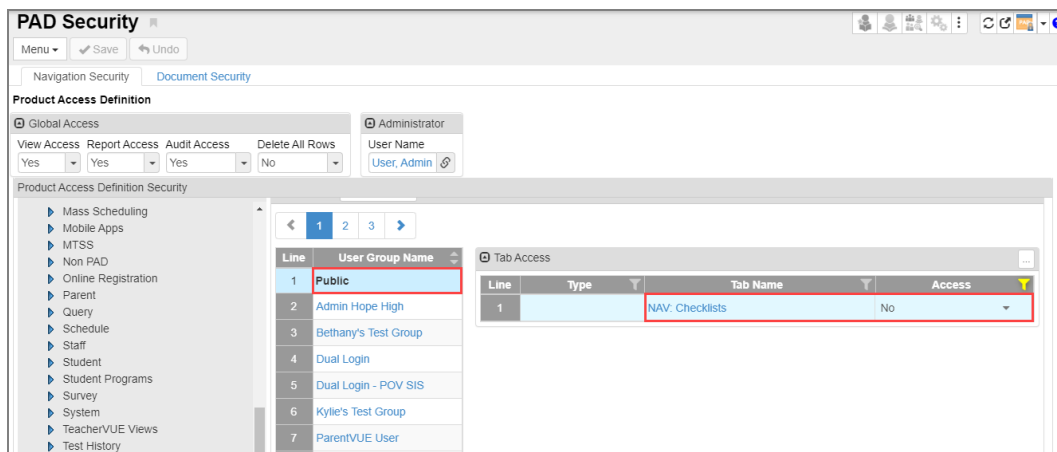
PAD Security Screen, Access Detail

Synergy Accessibility

Synergy SIS contains features for system accessibility in accordance with 508 Compliance. The Synergy SIS login and home pages contain a link for tips on using the JAWS reader within the application, including frequently used shortcut keys. This page is visible only to screen readers or at <<Synergy URL>>/accessibility.html.

> You can also view this screen using the keyboard shortcut Tab + Tab + Enter.

> Synergy SIS has been designed to work best with the JAWS reader on Firefox while in accessibility mode. While it is guaranteed to be compliant outside of those constraints, there is no guarantee that alternative combinations of browsers and screen readers have the same ease of use.

Synergy Accessibility Tips

Overview

Synergy Accessibility has been designed to work best with the JAWS reader on Firefox while in accessibility mode. While it is guaranteed to be compliant outside of those constraints, there is no guarantee that alternative combinations of browsers and screen readers will have the same ease of use.

The following usage patterns and shortcuts assume the usage JAWS with the latest version of Firefox.

Jump Lists

The very first region on the page will be the jump list. This is a configurable list of shortcuts and actions that can be accessed at any time using a configurable accessor key (default is control) and the provided shortcut key.

Synergy Accessibility Screen

Chapter 5:
Dashboard Widgets

Overview of Dashboard Widgets

The Synergy SIS home screen displays dynamic sources of information called dashboard widgets. Examples include graphical reports that track student data trends, such as attendance patterns, and links to external sources of web-based information, such as images or RSS feeds.

Synergy SIS Home Screen

You can select the gear icon on the top right of the Synergy SIS home page to open the Dashboard Configuration screen. This allows you to turn Tasks and Announcements on or off and change the layout of Dashboard Widgets. The image above shows widgets in the **Three Column** layout.

Dashboard Configuration Screen

Types of Dashboard Widgets

The Synergy SIS home page has four types of dashboard widgets available: Query, External Image, RSS Feed, and SQL Query.

- A Query widget displays information from an existing Synergy SIS public query. It displays the data results from the query in a graph or chart, such as a bar graph or pie chart.
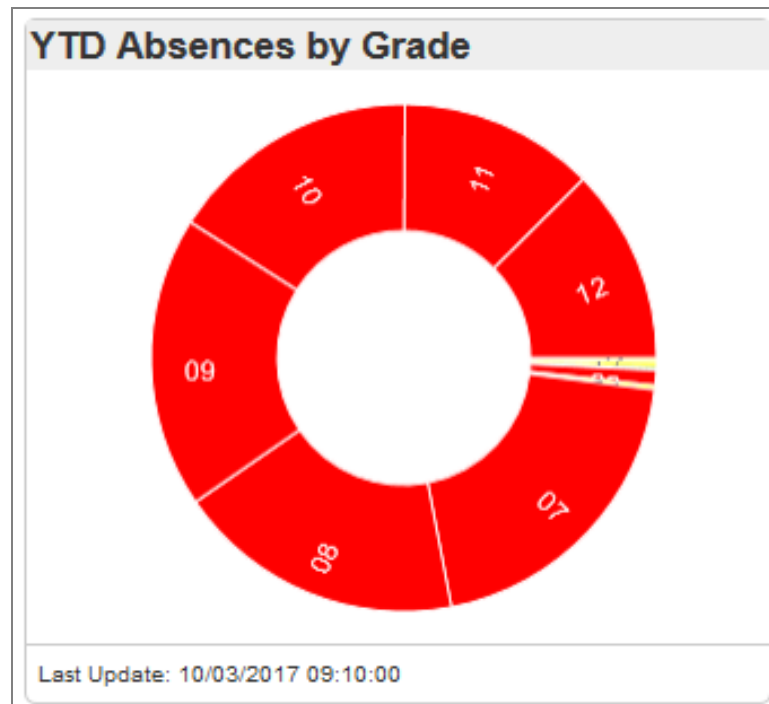
Query Widget, Doughtnut Graph

- An External Image widget displays an image from an external website, such as a weather radar map or traffic update. Click the link on the right to open the external site in a new window.

External Image Widget

- An RSS Feed widget shows the live results of an RSS feed.

NASA Education News

Thu, 28 Sep 2017 11:49 EDT: South Carolina Students to Speak with NASA Astronaut on Space Station

Thu, 21 Sep 2017 12:47 EDT: Students at National Air and Space Museum to Speak with Space Station Astronaut

Thu, 14 Sep 2017 16:18 EDT: Minnesota Students to Speak with NASA Astronaut on International Space Station

Thu, 14 Sep 2017 11:21 EDT: NASA Awards Funding to Support Professional Development Programs for STEM Educators

Tue, 12 Sep 2017 23:00 EDT: Three New Crew Members Arrive at International Space Station

Thu, 07 Sep 2017 14:06 EDT: NASA Television Coverage Set for Next International Space Station Crew Launch

RSS Feed Widget

- A SQL Query widget pulls data from a database using a SQL query and displays the data in a graphical format such as a pie chart or bar graph.

Total Parent/Student Logins - 2 weeks

Last Update: 06/19/2018 06:51:00
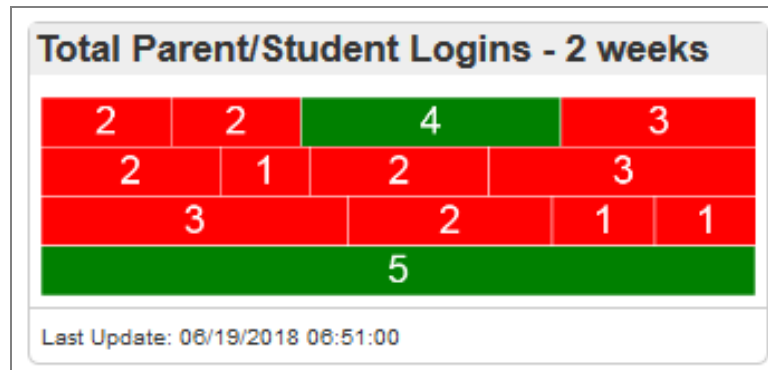
SQL Query Widget

Customizing the Dashboard

You can choose which dashboard widgets display on your Synergy SIS home page.

Managing Widgets from the Dashboard

1. Click the **Add Widgets** icon in the top-right on the Dashboard home page. The Available Widgets page opens.

Synergy SIS Home Screen

2. View widgets to add by selecting **All Widgets**, **Unused**, or **Used**.

   - Consolidate shows a list of all available widgets.

   - By Group displays widgets under their specific category.

Available Widgets Screen

3. Click **+** next to the widget to add it to the dashboard, or **−** to remove it.

4. Click and drag the widget box title to reorder widgets. Widgets can also move to another column if the current layout allows it.

5. Click the gear icon on the widget box to manage widget options.

- **Refresh** – Reloads the widget information
- **Remove** – Deletes the widget from the dashboard
- **Configure** – Opens the Dashboard Control screen for that widget
- Select a **Graph Type** to change the display of a Query widget.
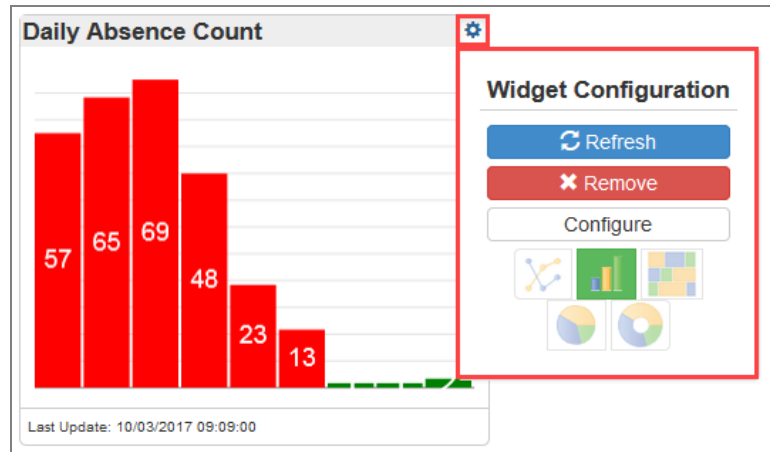
Widget Options

6. Click **OK**.

Dashboard Widget Options

Once added to the user's home page, clicking a widget enlarges it. Further actions are available if the widget's security settings allow them.

- Click the **Print** icon to print the widget.
- Click the **View Query** icon to view the underlying query for a graph.
- Click the **View Results** icon to view a spreadsheet of the data.
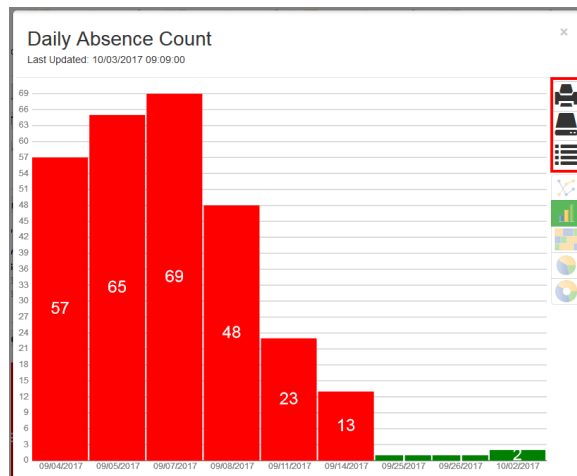
Query Widget

Creating Widgets

> Contact your system administrator if you do not have access to this screen.

1. Navigate to **Synergy SIS > System > Setup > Dashboard Control**.
2. Click **Add**. The Dashboard Control Add screen opens.

Dashboard Control Screen

3. Enter a **Name** for the new widget.
4. Select a **Group** to assign to the widget.
5. Select the **Widget Type**.

> Synergy SIS assigns the serialized **Widget ID** number, which cannot be changed.

6. Enter information about the widget in the **Description** field.
7. Enter the **Title** to display at the top of the widget on the home page.
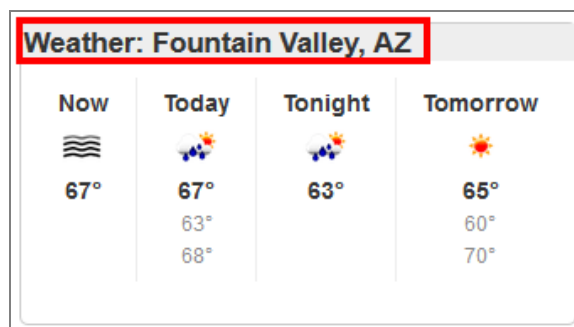
Widget Title

8. Leave the **Dimensions** fields blank to use the default values, or enter custom values.

    - **Height** and **Width** dimensions control how the widget displays on the home page, and cannot exceed *999* pixels.

    - **Graph Large Height** and **Graph Large Width** control the size of the enlarged version of the widget, and cannot exceed *9999* pixels.

> Each widget type has unique options under the **Options** tab, which are explained later in this chapter.

Dashboard Control Add Screen

9. Select the **Advanced** tab to specify how often the widget updates.

10. Select the frequency of updates from the **Schedule Task** list. Widgets can update *Once*, *Daily*, *Weekly*, or *Monthly*.
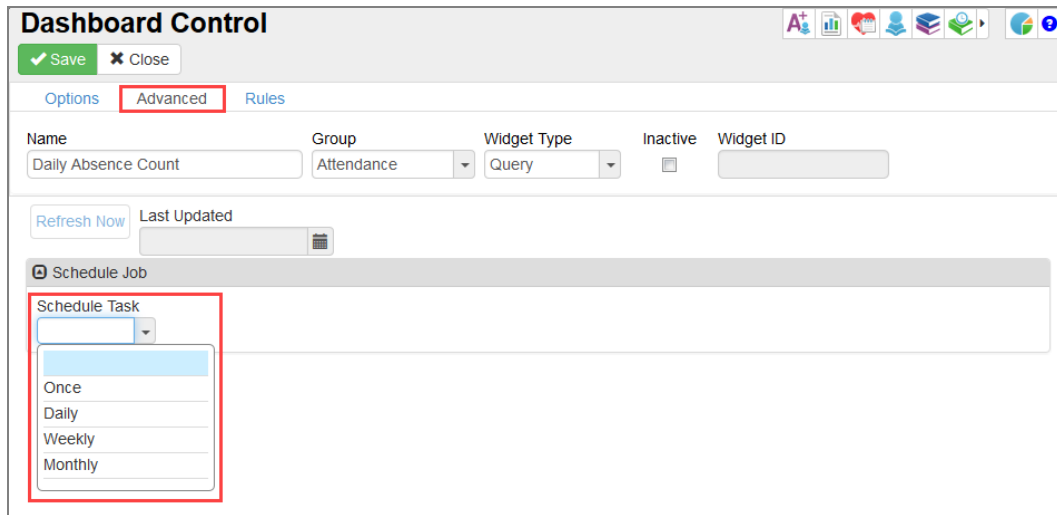
Dashboard Control Screen, Advanced Tab

- The *Daily* option schedules the widget to update every number of days or at a specific time of day.

    - To choose when the scheduled updates should begin and end, enter their **Start Time**, **Start Date**, and **Stop Date**.

    - You can also run updates throughout the day by entering the number of hours between updates. Enter the time updates end in **Hour(s) Ending at**.
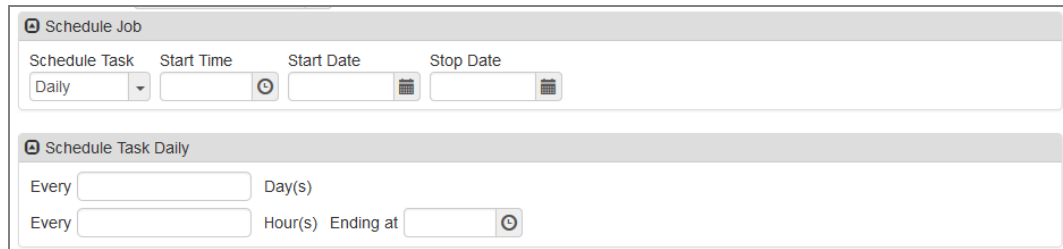
Dashboard Control Screen, Advanced Tab

- The *Weekly* option schedules the widget to update after a certain number of weeks on a specific day or days.
  - Enter the number of weeks between updates.
  - Select the days of the week updates run.

Dashboard Control Screen, Advanced Tab

- The *Monthly* option schedules the widget to update monthly on a specific day or days.
  - Select the **Day** of the month under the first option for a specific date.
  - Select the drop-down under the second option for updates on a specific weekday, such as the first Monday of a month. Specify the months to run the update.

Dashboard Control Screen, Advanced Tab

11. Click **Save**.

Creating Widgets from Search Results

You can create a graph widget from search results and add it to your Dashboard page. Create widgets from any screen that allows you to display search results in a grid.

> The following example uses the **Zip Code** field on the **Synergy SIS > Student > Student**.

1. Navigate to **Synergy SIS > Student > Student**.

2. Hover over **Zip Code** and select ⬛ in the Home Address section.

3. Click **Graph**. The Find Result screen displays.

Student Screen

4. Click 🌐 in the top right to save the icon to Dashboard Control. The Dashboard Control screen opens.
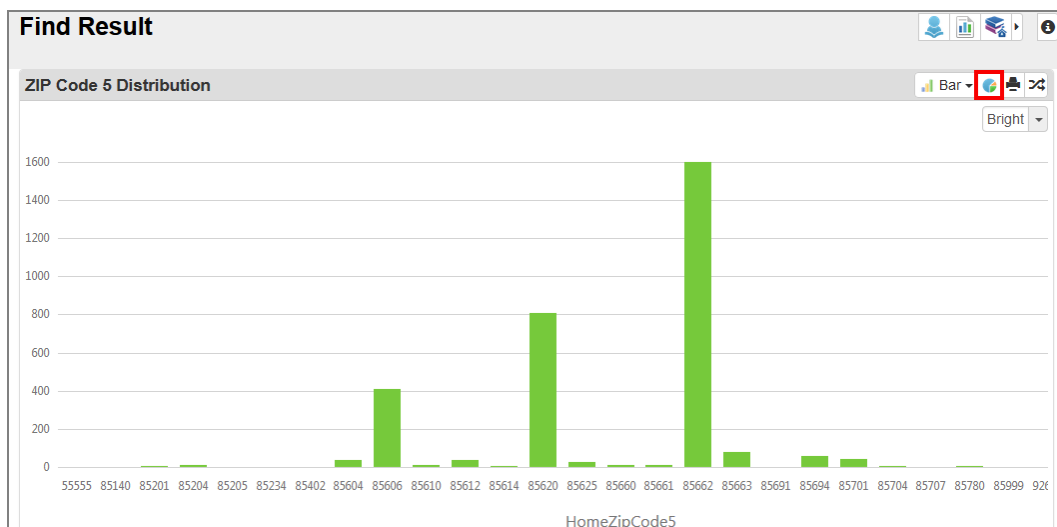
Find Result Screen

5. Modify any settings for the widget if needed.

6. Click the Add Widgets icon on the Synergy SIS dashboard.

7. Locate the created widget and click the **+** to enable it.
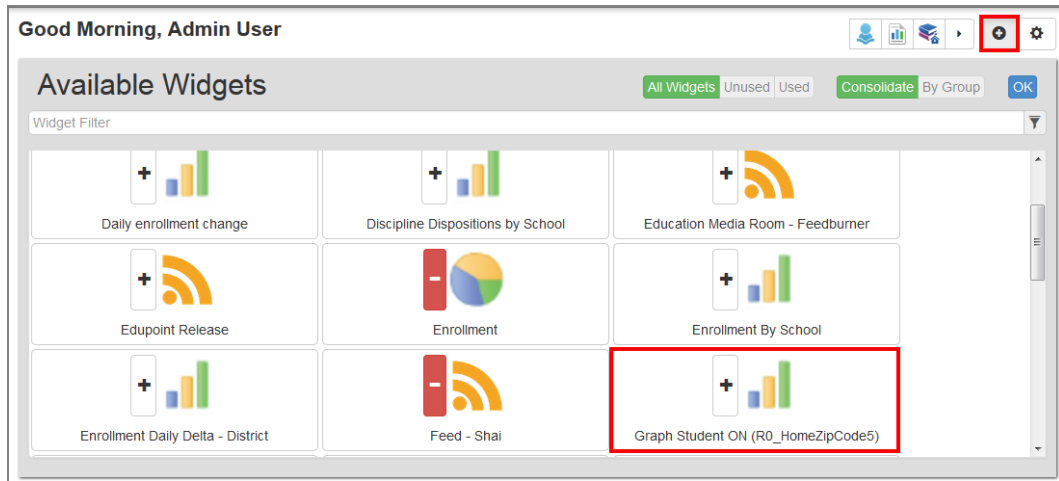
Synergy Dashboard Screen, Add Widget

8. Click **OK**.
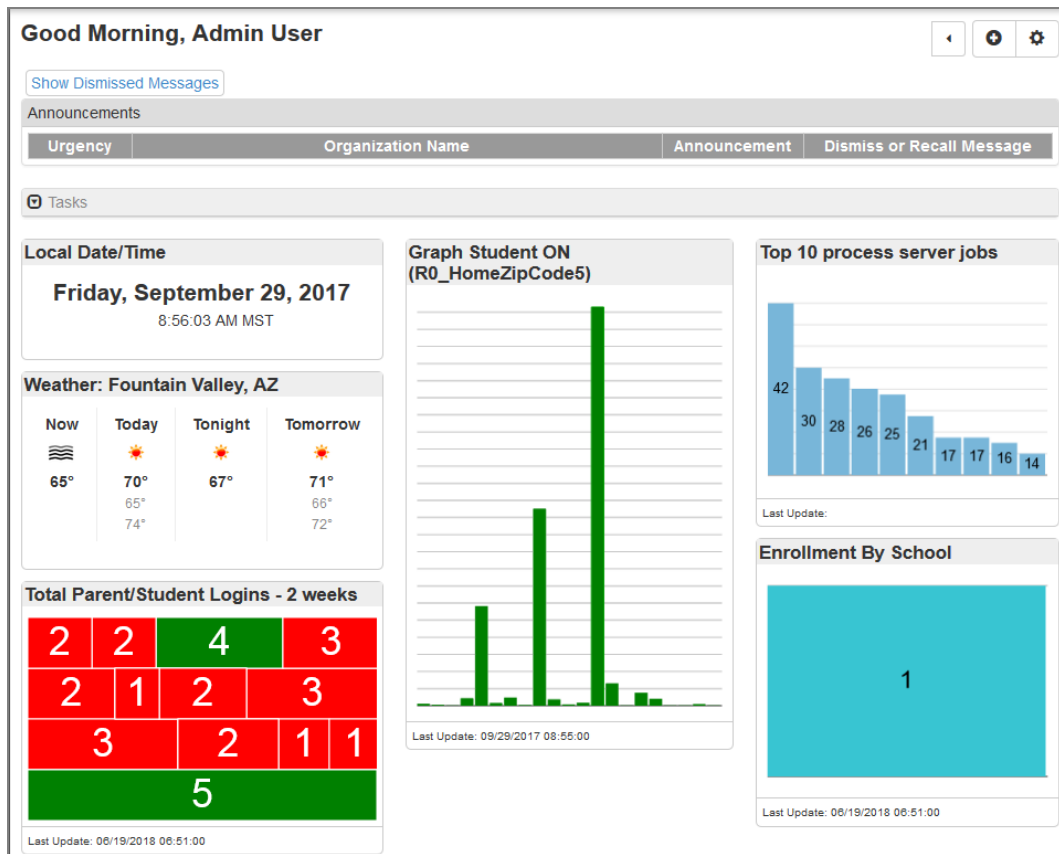
Synergy Dashboard Screen

Creating a Query Widget

A query widget uses a public query to display data.

1. Create a query and save it as a public query.

> See the *Synergy SIS – Query and Reporting Guide* for instructions on creating public queries.
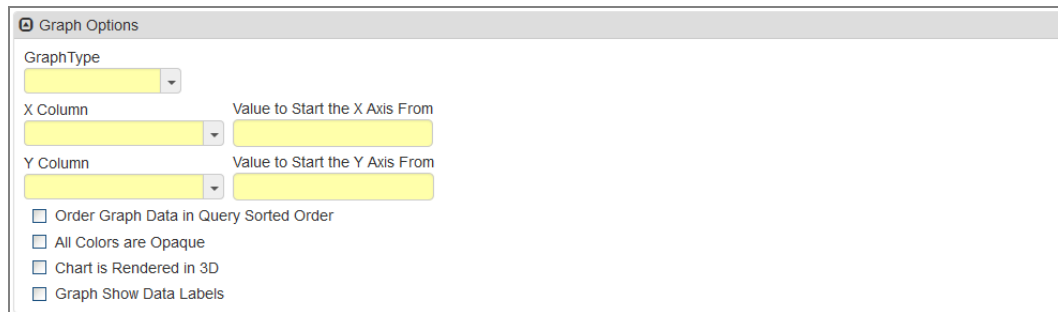
2. Follow the instructions outlined in Creating Widgets – selecting *Query* as the **Widget Type**.

3. Select a focus for the query.

   - Select a **Specific Organization** and **Specific Year** as the focus of the public query by clicking on the search icon next to those fields. Locate the appropriate organization and year.

   - Select **Focus Based** to use the focus of the entire query instead of a specific focus.

4. Use ⚭ in **Public query providing data for dashboard control** to locate the query to use for the widget.

5. Set the security options for the widget as needed.

   - **Do not allow user to open query** – Prevents the user from viewing the query

   - **Do not allow user to print report** – Prevents the user from printing the query

   - **Do not allow user to open query detail** – Prevents the user from opening the widget data in a spreadsheet

Dashboard Control Screen

6. Select the type of graph used for the widget in **Graph Type**.

   - *Bar* – Compares two or more values

   - *Curve* – Slopes up or down depending upon the data shown

   - *Doughnut* – Shows how proportions of data contribute to the whole, including secondary level data. Each slice in a doughnut graph ring represents a percentage of the total of all values.

   - *Line* – Represents a series of data points connected together with a line and shows data trends

- *Pie* – Shows each data item in a category as a pie wedge, with each wedge proportional to the sum of all data used in the graph
- *Surface* – Shows a 3D image of two independent variables on the x- and y-axis and a dependent variable on the z-axis
- *Tile Map* – Shows an interactive map of data represented by rectangles. Each rectangle increases size depending on the data recorded.

7. Select which properties the system uses for the graph from the **X Column** and **Y Column** fields, and set the **Values** from where the data begins.

8. Select **Order Graph Data in Query Sorted Order** to sort the data in the graph by the same sort order in the query.

9. Select **All Colors are Opaque** to show the pieces of the graph in solid colors.

10. Select **Chart is Rendered in 3D** to show the graph in 3D.

11. Select **Graph Show Data Labels** to show the names of the properties used on the X and Y axes.
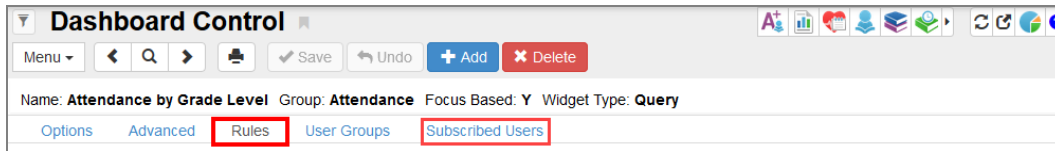

Dashboard Control Screen

12. Click **Save**.

Creating Rules for Data Points

After saving the widget, two additional tabs become available: the **Rules** tab and the **Subscribed Users** tab. The **Rules** tab selects each color that displays for the data points in the graph.

> See Adding or Removing Users for more information on the **Subscribed Users** tab.

Dashboard Control Screen

1. Select the **Rules** tab.

2. Click **Add** to create a new rule.

3. Add the appropriate conditions for each rule.

   - **Condition Order** – The order in which the system applies multiple conditions
   - **Condition** – How certain data compares to other data. Conditions include:
     - *Less Than*
     - *Less or Equal*
     - *Equal*
     - *Greater Than*
     - *Greater or Equal*
     - *Decrease in prior value (in %)*
     - *Increase from prior value (in %)*
     - *Decrease from prior raw value*
     - *Increase from prior raw value*

4. Enter the value for the comparison in the **Conditional Value** column.

5. Select the color to indicate each condition from the **Color** list.

Dashboard Control Screen, Rules Tab

6. Click **Save**.

Creating an External Image Widget

The External Image widget displays images from an internet source, such as weather or traffic reports.

1. Follow the instructions outlined in Creating Widgets, selecting *External Image* as the **Widget Type**.

2. Enter the URL for the image in **External URL Path**.

3. Enter the URL of the page displayed when the user clicks the option in enlarge view in **External Image Click URL**.

Dashboard Control Screen

4. Click **Save**.

Creating an RSS Feed Widget

An RSS Feed widget contains dynamic content downloaded through a feed, such as news updates.

1. Follow the instructions outlined in Creating Widgets, selecting *RSS Feed* as the **Widget Type**.
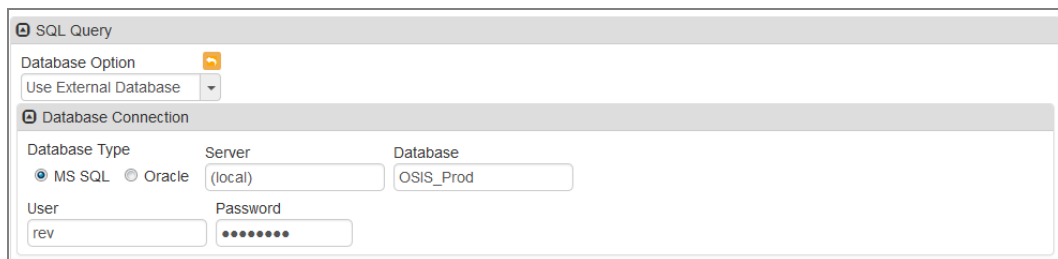
2. Enter the **RSS Feed URL Path**.

Dashboard Control Screen

3. Click **Save**.

Creating a SQL Query Widget

The SQL Query widget displays data from an external or Synergy database.

1. Follow the instructions outlined in Creating Widgets, selecting *SQL Query* as the **Widget Type**.

2. Select a **Database Option**.

    a. Select *Use External Database* or *Use Synergy Database* as the **Database Option**.

    b. Select *MS SQL* or *Oracle* as the **Database Type** if using an external database.

    c. Enter the name of the **Server** hosting the database.

    d. Enter the **User** name and **Password** to access the information.

Dashboard Control Screen

3. Select **Focus Based** to use the current focus of the user when running the query. If not, the organization and year is taken from the SQL query.

4. Select **No Launch Detail** to suppress system messages showing the progression of the query. You might want to leave this option unchecked while creating the widget to view any error messages.

5. Enter the query in the **SQL Command** field. A list of standard parameters to add to the query displays below this box.
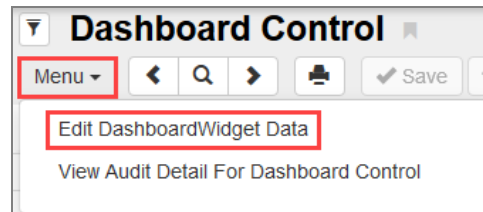

Dashboard Control Screen

6. Select **Order Graph Data in SQL Sorted Order** in the Graph Options section to sort the data in the graph by the same sort order detailed in the query.

7. Click **Save**.

Viewing and Editing Dashboard Widgets

Dashboard widgets can be viewed and edited from the main Dashboard Control page.

Editing a Widget

1. Navigate to **Synergy SIS > System > Setup > Dashboard Control**.

2. Find or scroll to the appropriate widget.

3. Select the *Edit DashboardWidget Data* option in the **Menu** to edit any and/or all of the fields.

Dashboard Control Screen

4. Edit the fields as necessary.

> Selecting **Inactive** removes a widget from current or future use but does not delete it.

5. Click **Save**. Once you edit a dashboard widget, you must refresh the widget to display the modified version on the dashboard.

Refreshing a Widget

1. Find or scroll to the appropriate widget on the Dashboard Control screen.

2. Select the **Advanced** tab.

3. Click **Refresh Now**. The Job Details window provides updates on the status of the refresh.
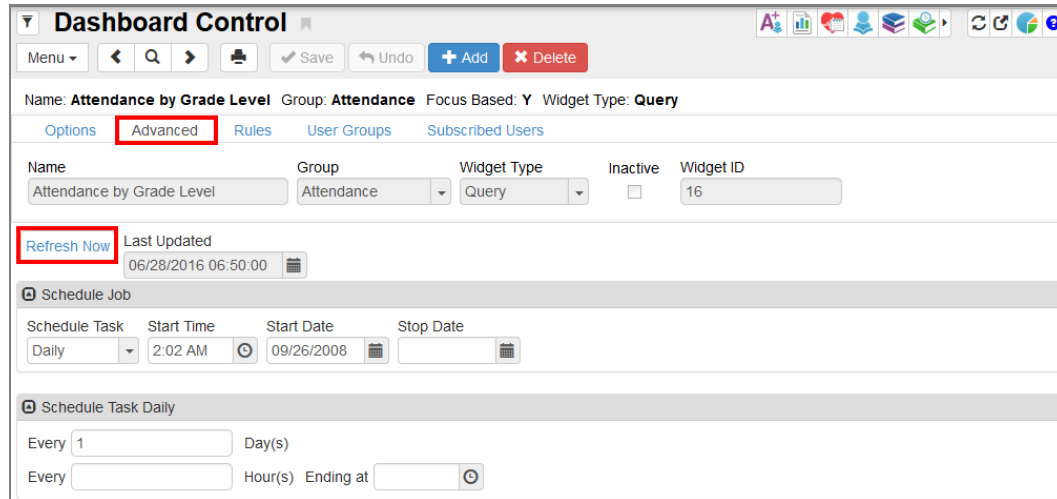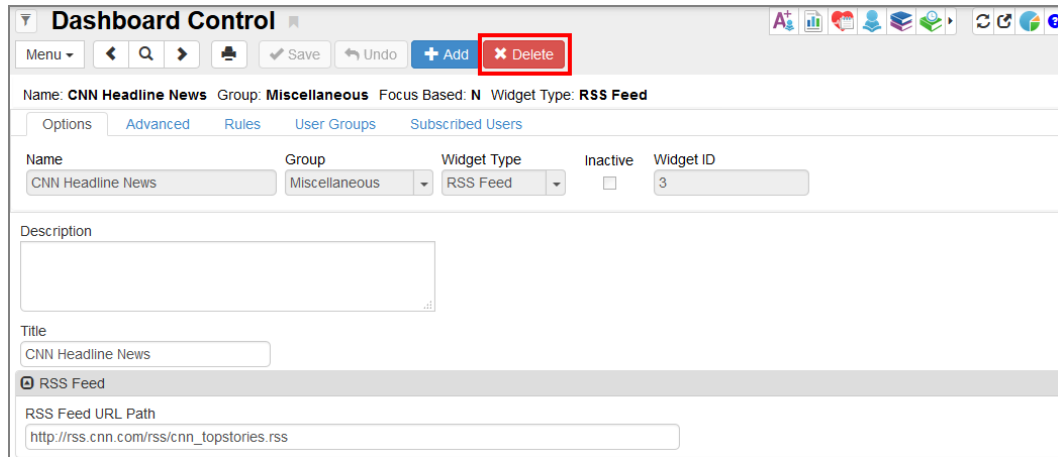

Dashboard Control Screen, Advanced Tab

A new window opens when the refresh process completes displaying the results of the refresh and the users' updated home screens.

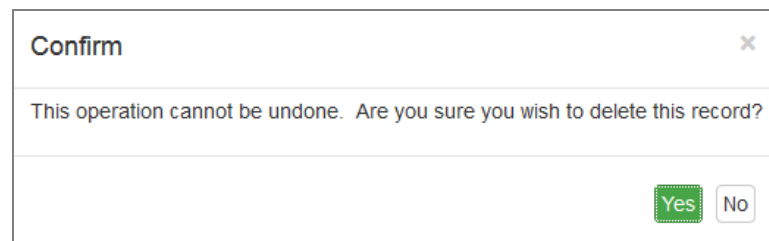*Job Details Window*

Deleting a Dashboard Widget

1. Find or scroll to the appropriate widget on the Dashboard Control screen.

2. Click **Delete**.

Dashboard Control Screen

3. Click **Yes** on the confirmation message.


Confirmation Message

Adding or Removing Users

The **User Groups** and **Subscribed Users** tabs on the Dashboard Control screen display all users who have the widget active on their home page.

> Added widgets display in the first row of a user's home page. Widgets can be reordered on the user's dashboard page.
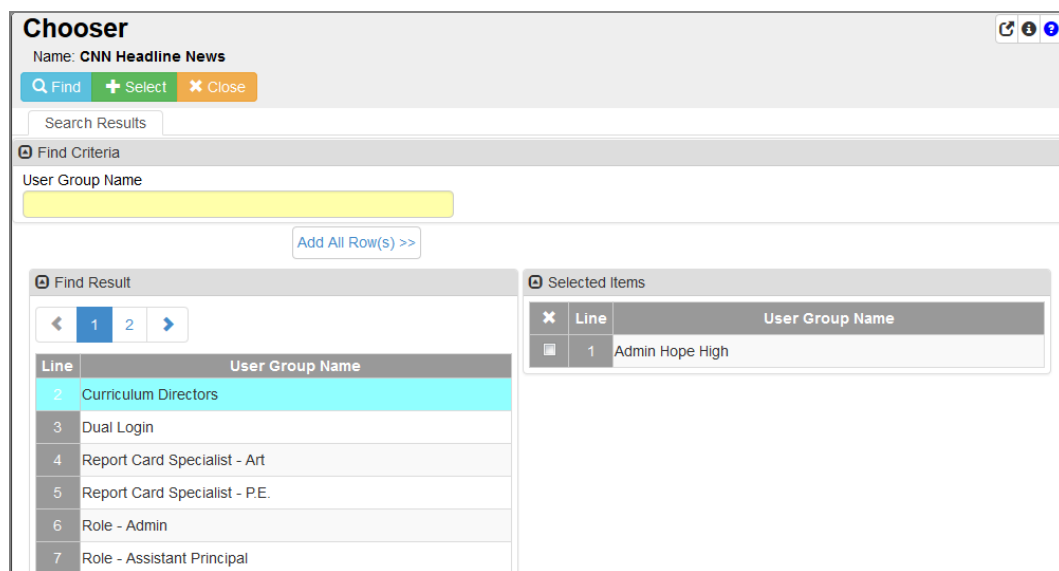
Adding a User Group to a Widget

1. Select the **User Groups** tab.

2. Click **Chooser**.
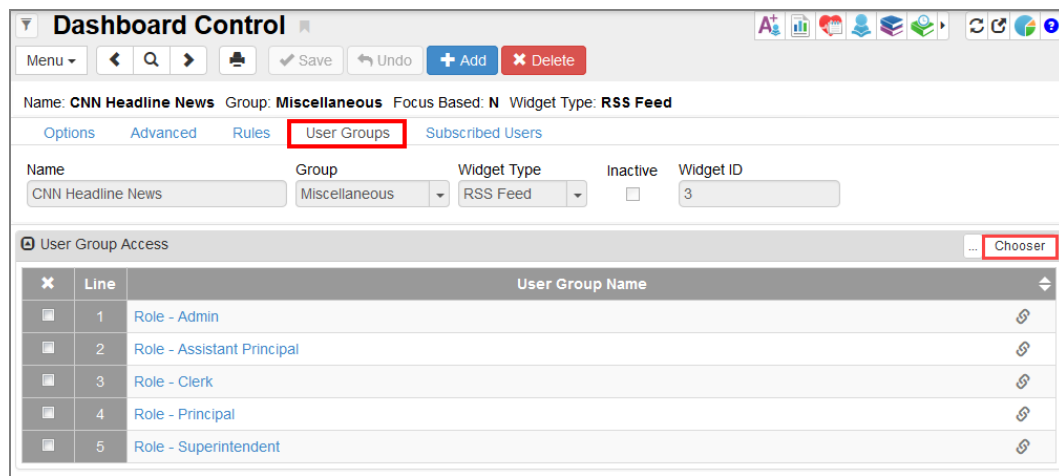
Dashboard Control Screen, User Groups Tab
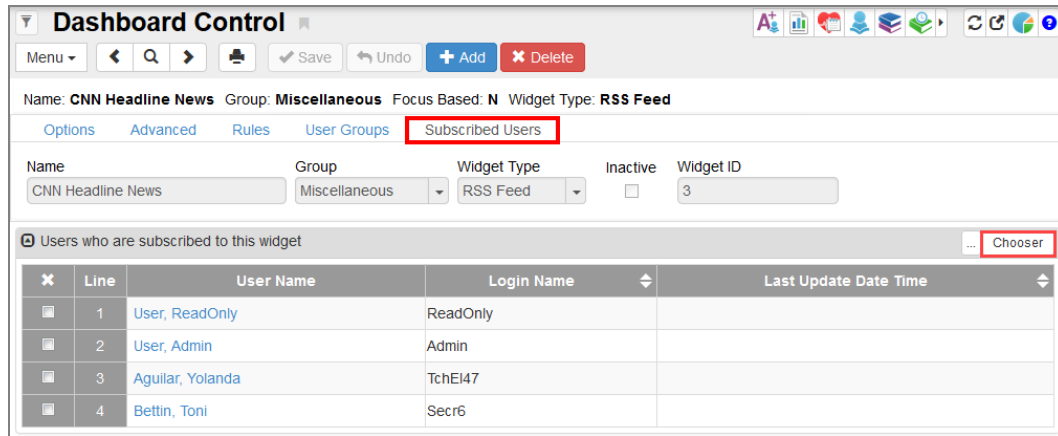
3. Locate the appropriate user group or groups.

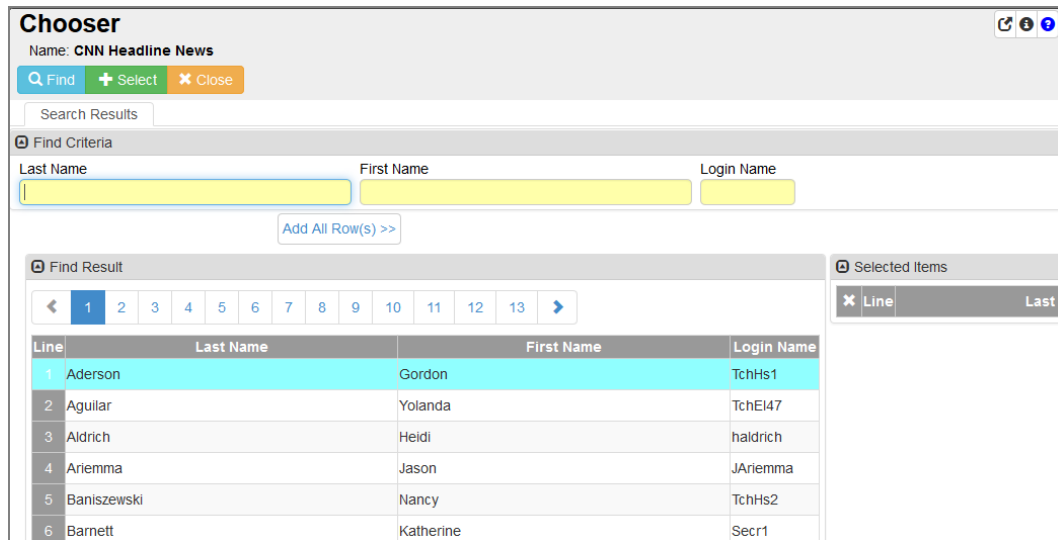
Chooser Screen

4. Click **Save**.

Adding Subscribed Users

1. Select the **Subscribed Users** tab.

2. Click **Chooser**.

Dashboard Control Screen, Subscribed Users Tab

3. Locate the appropriate user or users.

Chooser Screen

4. Click **Save**.

Sample Query Widgets

You can create the following Query widget samples within Dashboard Control. You must save the query information provided as a public query before using it in a widget.

> See the *Synergy SIS – Query and Reporting Guide* for instructions on creating public queries.

Attendance by Grade

This widget shows the year-to-date absences by grade level.

Dashboard Control Screen

This widget uses the following query:

```
K12.Student R0, K12.EnrollmentInfo.StudentSchoolYear R1,
K12.EnrollmentInfo.StudentEnrollment R2,
K12.AttendanceInfo.StudentDailyAttendance R3,
K12.AttendanceInfo.Setup.SchoolAttendanceReasons R4
(CodeAbsReasSchYearGU,R3.CodeAbsReas1GU,Outer),
K12.AttendanceInfo.Setup.DistrictAttendanceReasons R5
(CodeAbsReasGU,R4.CodeAbsReasGU,Outer)
COLS R0.FormattedName, R0.Age, R0.BirthDate, R3.AbsDate,
R5.Abbreviation, R5.Description, R5.Type (,,,,,,,Code), R1.Grade
(,,,,,,,Description)
If R5.Type In ('EXC', 'UNV', 'UNE') And R3.AbsDate <'$DATE' And
R3.AbsDate >='$DATE-30'
Birth Month distribution
```

Daily Absence Count

This widget shows absences per day for all grades at a specified school.

Dashboard Control Screen

This widget uses the following query:

```
K12.Student R0, K12.EnrollmentInfo.StudentSchoolYear R1,
K12.EnrollmentInfo.StudentEnrollment R2,
K12.AttendanceInfo.StudentDailyAttendance R3,
K12.AttendanceInfo.Setup.SchoolAttendanceReasons R4
(CodeAbsReasSchYearGU,R3.CodeAbsReas1GU,Outer),
K12.AttendanceInfo.Setup.DistrictAttendanceReasons R5
(CodeAbsReasGU,R4.CodeAbsReasGU,Outer)
COLS R0.FormattedName, R0.Age, R0.BirthDate, R3.AbsDate,
R5.Abbreviation, R5.Description, R5.Type (,,,,,,,Code), R1.Grade
(,,,,,,,Description)
If R5.Type In ('EXC', 'UNV', 'UNE') And R3.AbsDate <'$DATE' And
R3.AbsDate >='$DATE-30'
```

The graph uses the following settings on the **Rules** tab:

Dashboard Control Screen, Rules Tab

Sample SQL Query Widgets

You can create the following SQL Query widget samples within Dashboard Control.

Enrollment by Day

This SQL Query widget shows the number of students enrolled each day at the specified school. This widget uses the following query:

```
-- Enrollment by day
declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R'
and SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE
-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (TDAY smalldatetime, ENRCNT int, DOW int)
declare @curEnr int
set @curDt = @startDt
while @curDt <= @stopDt
begin
set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_
YEAR_GU = ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt));
set @curDt = dateadd(day, 1, @curDt)
end;
select replace (str (month(TDAY)) + '/' + str (day(TDAY)) + '/' +
str (year(TDAY)), ' ', '') as 'TDAY', ENRCNT from @result
```

The graph uses the following options:

Dashboard Control Screen

The graph uses the following settings on the **Rules** tab:

Dashboard Control Screen, Rules Tab

Enrollment by Week

This SQL Query shows the number of students enrolled each week at the specified school. This widget uses the following query:

```
-- Enrollment by week
declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R'
and SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = '09/09/2008'
set @stopDt = @DATE
-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (WEEK smalldatetime, ENRCNT int)
declare @curEnr int
set @curDt = @startDt
while @curDt < @stopDt
begin
set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_
YEAR_GU = ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu
```

```
and ssy.ENTER_DATE <= @curDt
and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
insert into @result values(@curDt, @curEnr)
set @curDt = dateadd(week, 1, @curDt)
end;
select replace (str (month(WEEK)) + '/' + str (day(WEEK)) + '/' +
str (year(WEEK)), ' ', '') as 'WEEK', ENRCNT from @result
```

The graph uses the following options:

Dashboard Control Screen

Enrollment Daily Delta

This SQL Query displays the change in the number of enrolled students from day to day, for the specified school. This widget uses the following query:

```
-- Enrollment by day
declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R'
and SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE
-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int,
DELTA int)
declare @curEnr int
declare @lastVal int
declare @delta int
set @curDt = @startDt
set @lastVal = 0
while @curDt <= @stopDt
begin
set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and oyr.organization_year_gu = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
set @delta = @curEnr - @lastVal
if (@lastVal = 0)
```

```
   set @delta = 0
set @lastVal = @curEnr
if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt),
@delta);
set @curDt = dateadd(day, 1, @curDt)
end;
select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' +
str (year(EDAY)), ' ', '') as 'DAY',
ENRCNT, DELTA from @result
```

The graph uses the following options:

Dashboard Control Screen

The graph uses the following settings on the **Rules** tab:

Dashboard Control Screen, Rules Tab

Enrollment Daily Delta – District

This SQL Query displays the change in the number of enrolled students from day to day for the district. This widget uses the following query:

```
-- Enrollment by day
declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = @FOCUS_YEAR_GU
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE
declare @lastVal int
declare @delta int
set @curDt = @startDt
set @lastVal = 0
while @curDt <= @stopDt
begin
set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
set @delta = @curEnr - @lastVal
if (@lastVal = 0)
  set @delta = 0
set @lastVal = @curEnr
if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt),
@delta);
set @curDt = dateadd(day, 1, @curDt)
end;
select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' +
str (year(EDAY)), ' ', '') as 'DAY',
ENRCNT, DELTA from @result
-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int,
DELTA int)
declare @curEnr int
```

The graph uses the following options:

Dashboard Control Screen
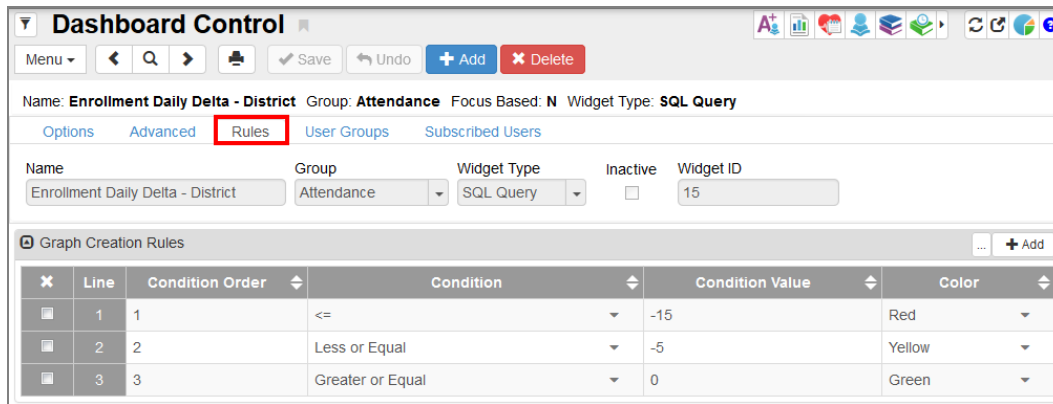
The graph uses the following settings on the **Rules** tab:

Dashboard Control Screen, Rules Tab

Students Per Birth Month

This SQL Query widget shows the number of students born in each month. This widget uses the following query:

```
select BD =
   case MONTH(BIRTH_DATE)
WHEN '1' THEN 'January'
WHEN '2' THEN 'February'
WHEN '3' THEN 'March'
WHEN '4' THEN 'April'
WHEN '5' THEN 'May'
WHEN '6' THEN 'June'
WHEN '7' THEN 'July'
WHEN '8' THEN 'August'
WHEN '9' THEN 'September'
WHEN '10' THEN 'October'
WHEN '11' THEN 'November'
WHEN '12' THEN 'December'
end, count(*) as TOTAL

from REV_PERSON
where BIRTH_DATE is not null
GROUP BY MONTH(BIRTH_DATE)
ORDER BY MONTH(BIRTH_DATE)
```

The graph uses the following options:

Dashboard Control Screen

Sample External Image Widgets

You can create the following External Image widget samples within Dashboard Control.

Kennedy Space Center Launch

This External Image widget displays a still image of NASA's Kennedy Space Center, which updates periodically during shuttle launches.

Dashboard Control Screen

- **External URL Path** – http://science.ksc.nasa.gov/shuttle/countdown/video/chan4large.jpg
- **External Image Click URL** – http://science.ksc.nasa.gov/shuttle/countdown/video/

Kennedy Space Center Widget

Weather in the Pacific Northwest

This External Image widget displays a satellite image of the weather radar for the Pacific Northwest.

Dashboard Control Screen

- **External URL Path** – http://images.intellicast.com/WxImages/RadarLoop/rno_None_anim.gif

- **External Image Click URL** –
  http://www.intellicast.com/national/radar/current.aspx?location=USNV0076&animate=true
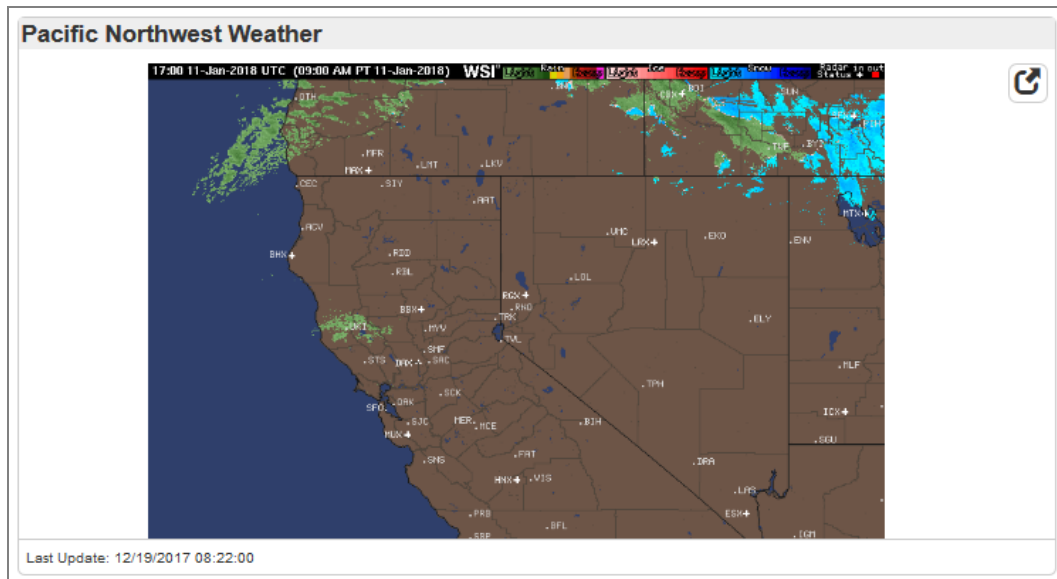
Pacific Northwest Weather Widget