

Getting Started with Synergy SIS



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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: <ul style="list-style-type: none"> • 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	-	<p>Updates:</p> <ul style="list-style-type: none"> Added Formatting Window instructions to Synergy How-To Updated images for quality and consistency
6.0	Dec 2017	2018.01	<p>Updates:</p> <ul style="list-style-type: none"> Moved Screen Options section from Parts of the Synergy SIS Screen to Synergy Options Menu Moved Dashboard Control Security to the <i>Synergy SIS – System Administrator Guide</i> 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	-	<p>Updated the Content Area section of Parts of the Synergy SIS Screen to provide clarification on what this area contains</p>
8.0	Jun 2018	2019	<p>Updates:</p> <ul style="list-style-type: none"> 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	<p>Updates:</p> <ul style="list-style-type: none"> • 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	<p>Updates:</p> <ul style="list-style-type: none"> • 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	<p>Updates:</p> <ul style="list-style-type: none"> Added the following in Grids: <ul style="list-style-type: none"> 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: <ul style="list-style-type: none"> 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

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Chapter 1: Preparing to Use Synergy SIS

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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.

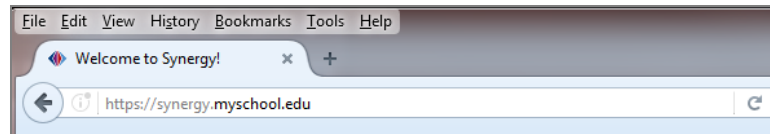
Allow Pop-Ups

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

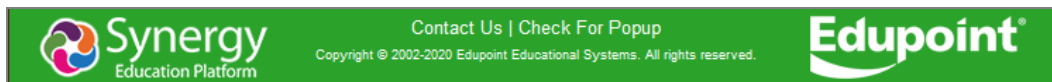
1. Open a new browser window.
2. Navigate to the web address of the Synergy SIS web server provided by the district system administrator to access the Synergy SIS system.



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

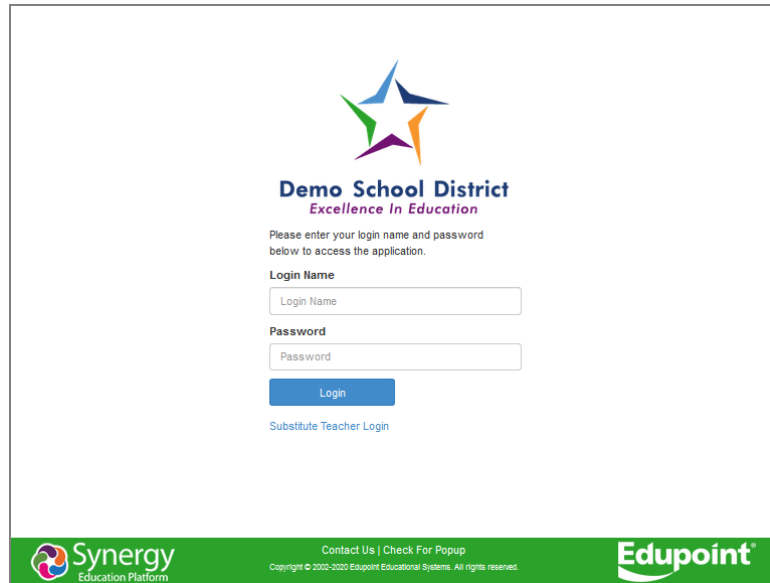
This creates a Favorite in your Microsoft Edge or Internet Explorer browser for quick access to your Synergy SIS site.



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.

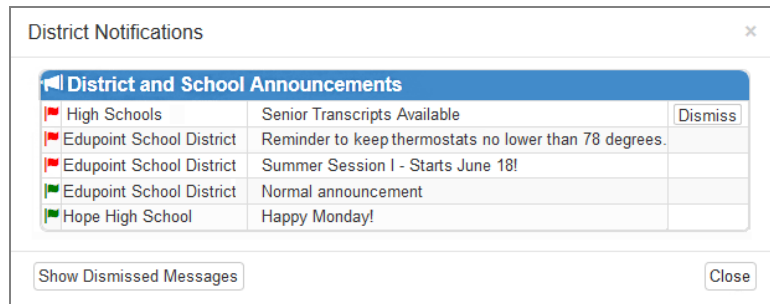
Logging in to Synergy SIS

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 and School Announcements			
	High Schools	Senior Transcripts Available	Dismiss
	Edupoint School District	Reminder to keep thermostats no lower than 78 degrees.	
	Edupoint School District	Summer Session I - Starts June 18!	
	Edupoint School District	Normal announcement	
	Hope High School	Happy Monday!	

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.

Announcements

Urgency	Organization Name	Announcement	Dismiss or Recall Message

Tasks

Date/Time	User	Description	Action
08/23/2017 5:15 PM	Online Registration	9 updates are pending review	✓
12/14/2017 7:38 PM	Zuniga, Kathleen	Electronic Student Data Response from: Other School District - Other High School	
12/26/2017 1:51 PM	Abbott, Billy C	Home and mail address were changed by Rob Wilson at Adams Elementary. Both home and mail new addresses: 1955 S Val Vista Dr, Mesa, AZ 85204 Please confirm and acknowledge the change by clicking the checkmark at the right.	✓

Local Date/Time
 Friday, September 29, 2017
 3:33:10 PM MST

Weather: Fountain Valley, AZ

Now	Today	Tonight	Tomorrow
86°	86°	72°	71°
	72°	66°	72°

Total Parent/Student Logins - 2 weeks

2	2	4	3
2	1	2	3
3	2	1	1
5			

Last Update: 06/19/2018 06:51:00

Top 10 process server jobs

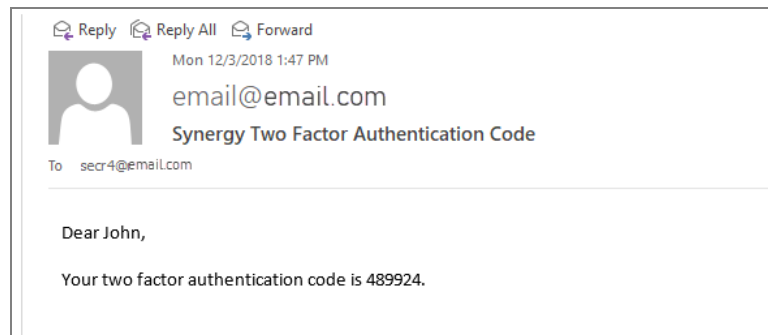
42	30	28	26	25	21	17	17	16	14
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Synergy SIS Home Screen

Logging in with Two Factor Authentication

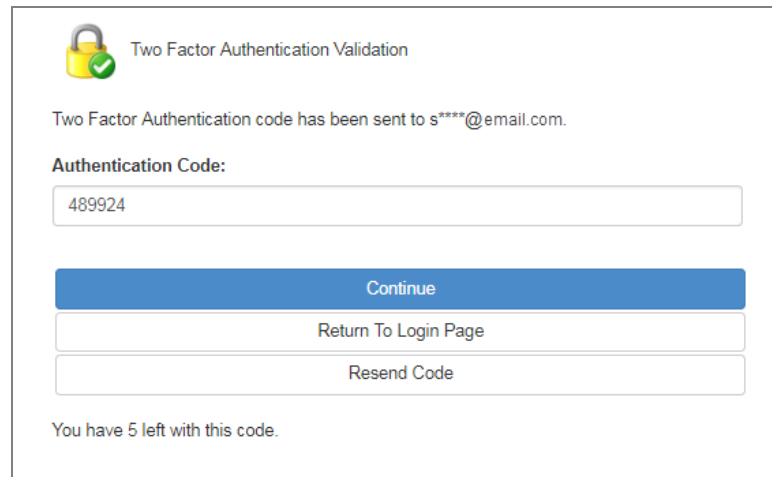
When two factor authentication is enabled, the Two Factor Authentication Validation screen opens each day you log in or only the first time you log in depending on the setup option chosen by your administrator.

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.



The image shows a web interface for Two Factor Authentication Validation. At the top left is a yellow padlock icon with a green checkmark. To its right is the title "Two Factor Authentication Validation". Below the title, a message states: "Two Factor Authentication code has been sent to s****@email.com." Underneath, the label "Authentication Code:" is followed by a text input field containing the number "489924". Below the input field are three buttons: a blue "Continue" button, a white "Return To Login Page" button, and a white "Resend Code" button. At the bottom of the form, a message reads: "You have 5 left with this code."

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.



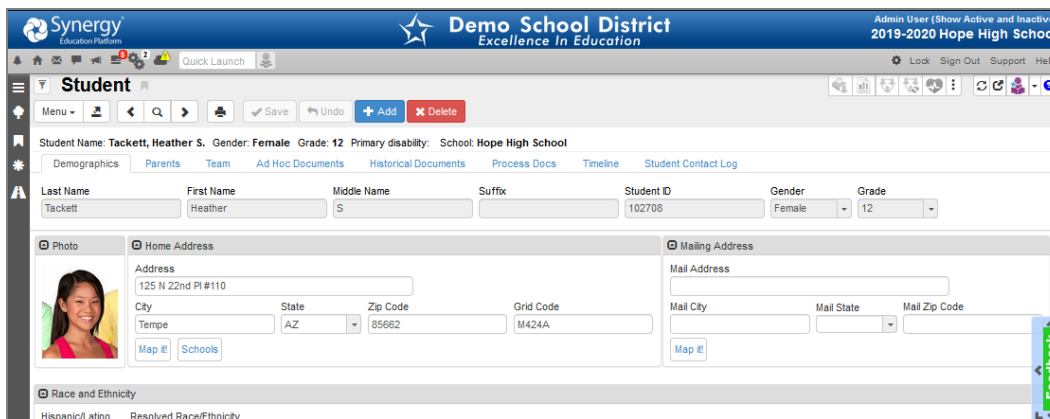
You have five attempts to correctly enter the authentication code emailed to you. The number in the message: "You have 5 left with this code" decreases by one with each incorrect entry. A new authentication code is emailed to the user after five incorrect entries and the number in the message resets to five.

Chapter 2: Introduction to Synergy SIS

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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

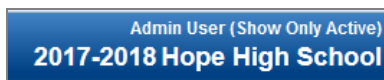
Clicking the Synergy logo opens a screen that provides the product version information.



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

Year: 2019-2020

Organization: Hope High School

Show Students: Show Active Only
 Show Inactive Only
 Show Active and Inactive

Save Cancel

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.



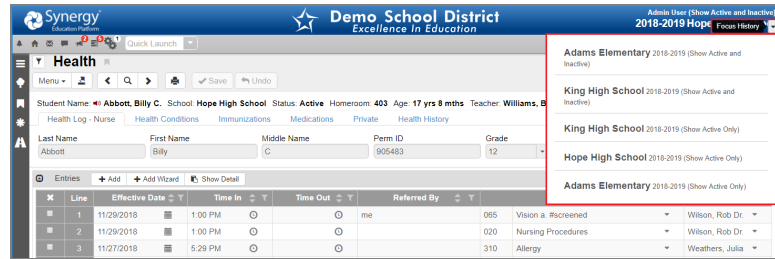
Changing your focus on the main and detached screens act independently.

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.

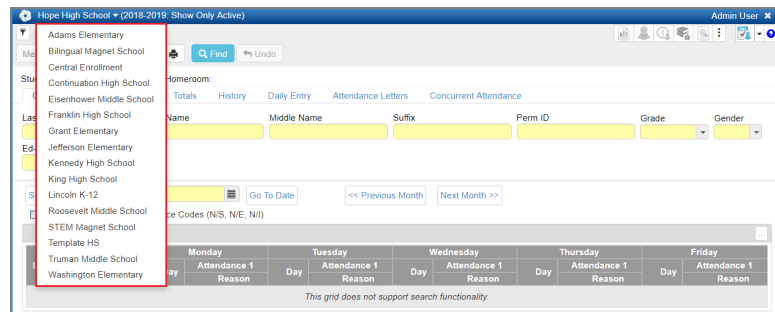
The Health screen is an example of an Organization year-aware screen. Changing the focus on the screen might change the tabs that display.



Health Screen




The detached view of an Organization year-qualified screen, such as the Daily Attendance screen, does not show the sub-nodes.

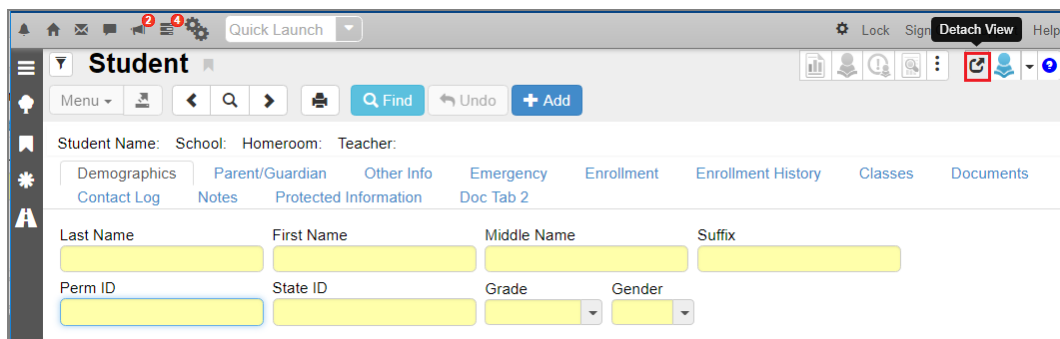


Daily Attendance Screen

Changing Focus on Detached Views

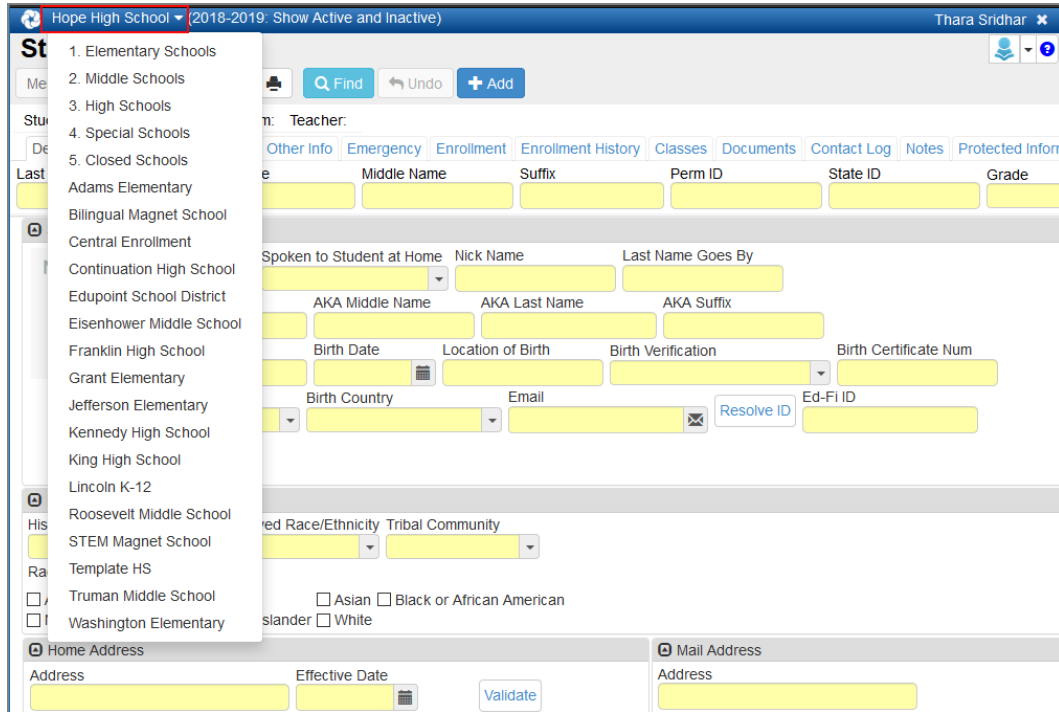
The following example shows how to change the focus on detached views for **Organizations**, school **Year**, and **Show Students**.

1. Navigate to **Synergy SIS > Student > Student**.
2. Click  to open the Student screen in a new window.



Student Screen

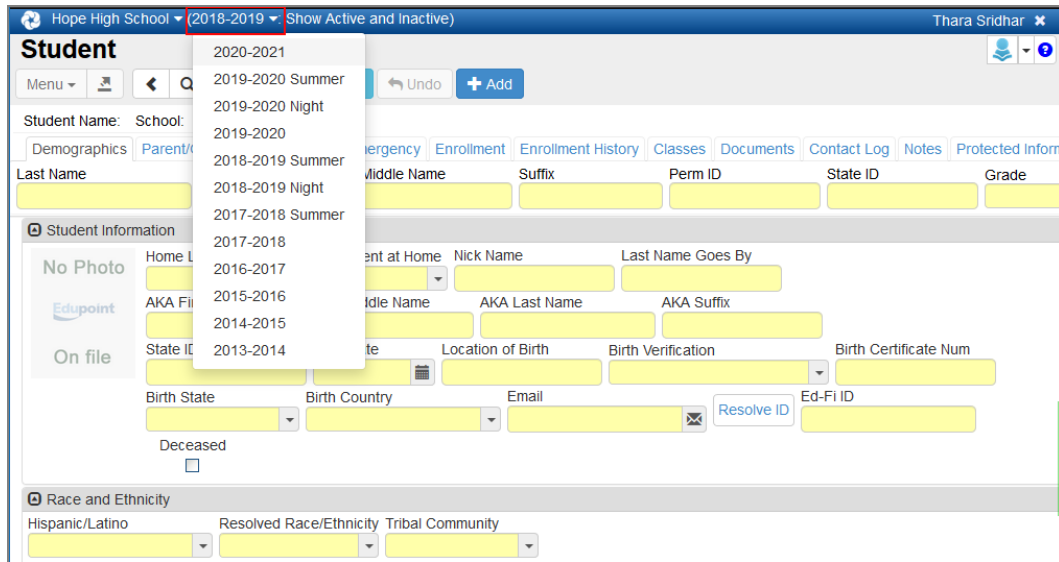
3. Click Hope High School to change the focus to another school.



Student Screen

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

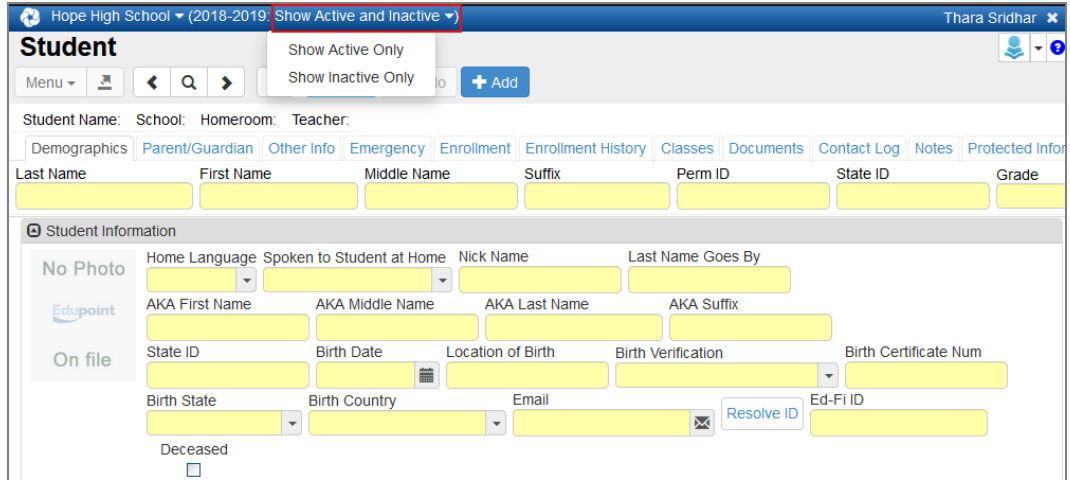
5. Select another school year.



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

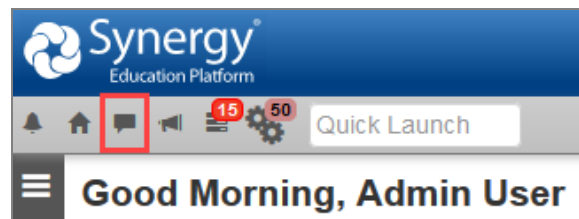
Click the Synergy Mail icon to open the Synergy Mail email interface. Synergy Mail allows staff, teachers, students, and parents to send and receive email through Synergy applications.



Synergy Mail Icon

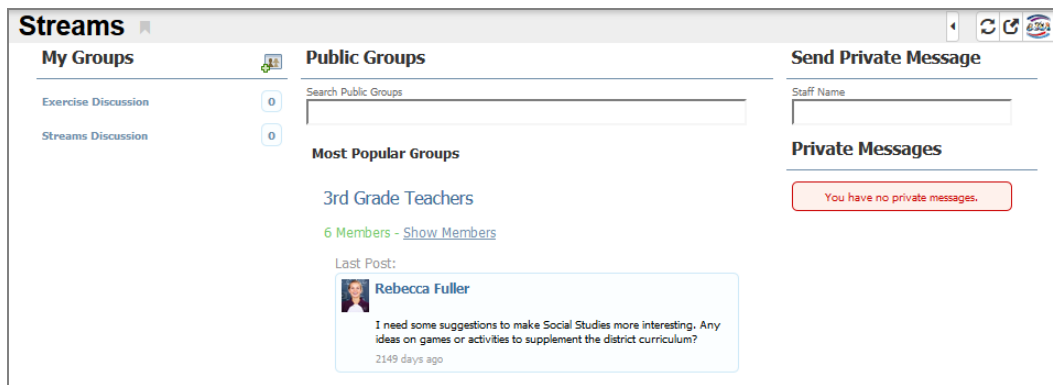
Streams

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.



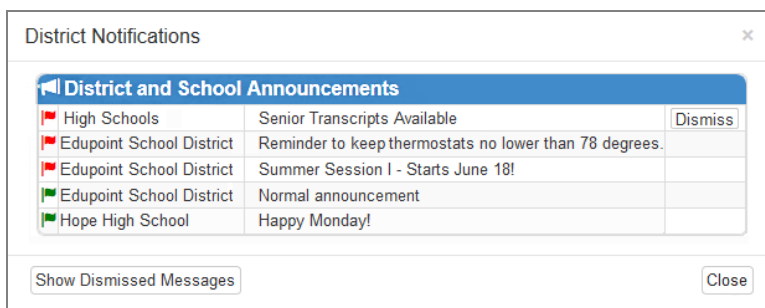
See the *Synergy SIS – Communications Guide* for more information.

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.

The screenshot shows the 'Job Queue Viewer' interface. At the top, there's a header with 'Job Queue' and navigation links for 'Lock', 'Sign Out', and 'Support'. Below this, there are sections for 'Recurring Jobs' and 'Job Queue Status'. The 'Recurring Jobs' section lists two jobs: 'District Mass Sync Job ID' and 'EMAIL_IMMEDIATE'. The 'Job Queue Status' section lists three jobs, each with a 'View' button and a 'Dismiss' button. The 'JobQueue Viewer' button at the bottom is highlighted with a red box.

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.

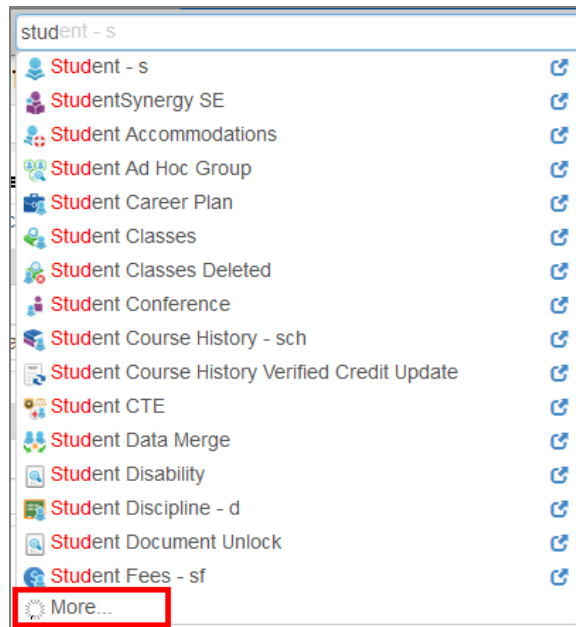


When focused to the district, this feature only works from student-based screens, such as Student Incident, Health, and Daily Attendance. Using the Find or Scroll options displays students that attend the same school as the student in focus on the main screen.



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.

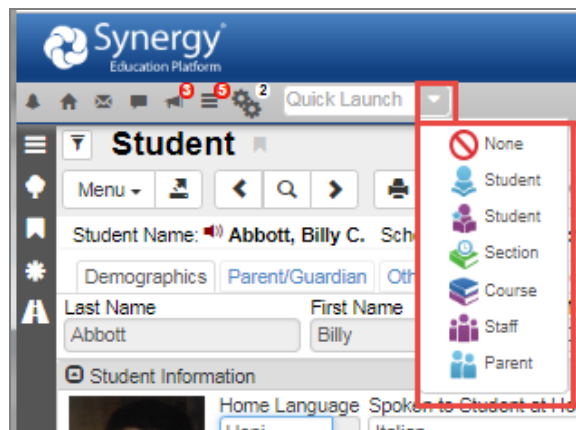


Synergy Quick Launch

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.

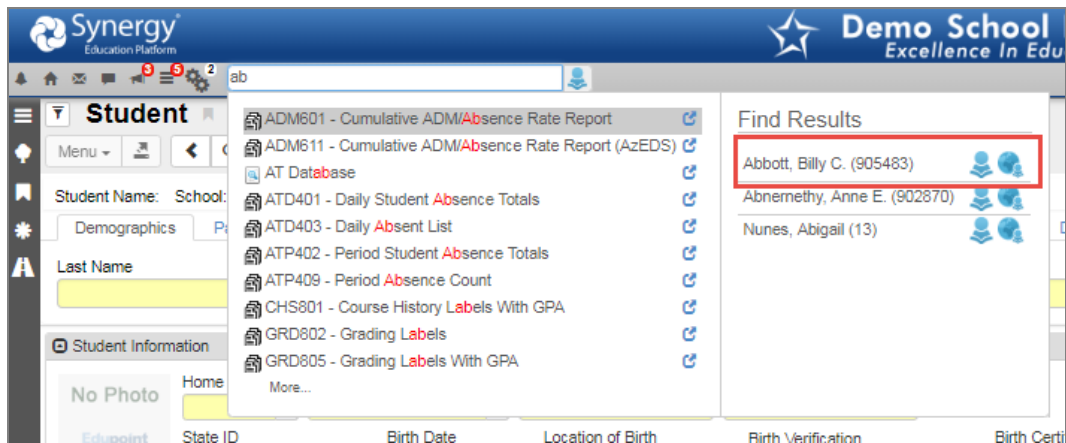
-  None – Clears records under the Find results
-  Student – Search for Synergy SIS student records using student name or **Perm ID** to open the Student or StudentVUE screens.
-  Student – Search for student records using the student name or **Perm ID** to open the Synergy SE Student screen.
-  Section – 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

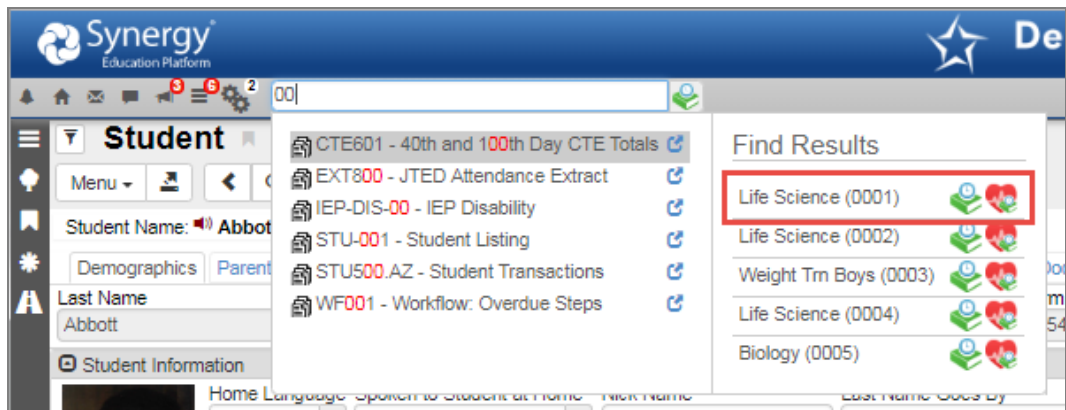
1. Hover over Quick Launch and select .
2. Enter the student name or **Perm ID** in **Quick Launch** until records display under Find Results.
3. Select the student name to load the student in the current Student screen, or select an icon to open the student's record in that screen.



Quick Launch Entities


Using Section Entity Type

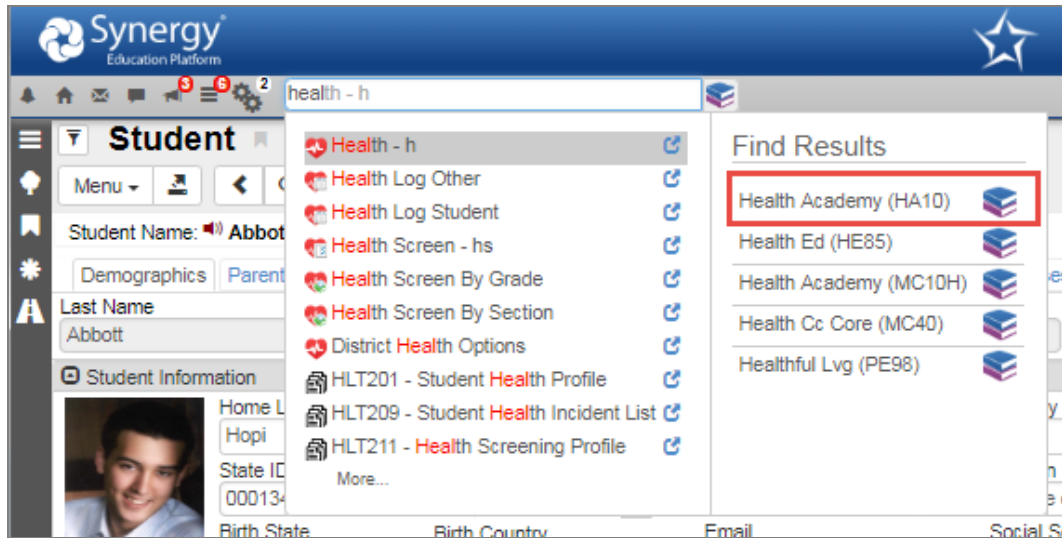
1. Hover over Quick Launch and select .
2. Enter the **Section ID** or **Course Title** until records display under Find Results.
3. Select the section to open the record in the current screen, or select an icon to open the section record in that screen.



Quick Launch Entities


Using Course Entity Type

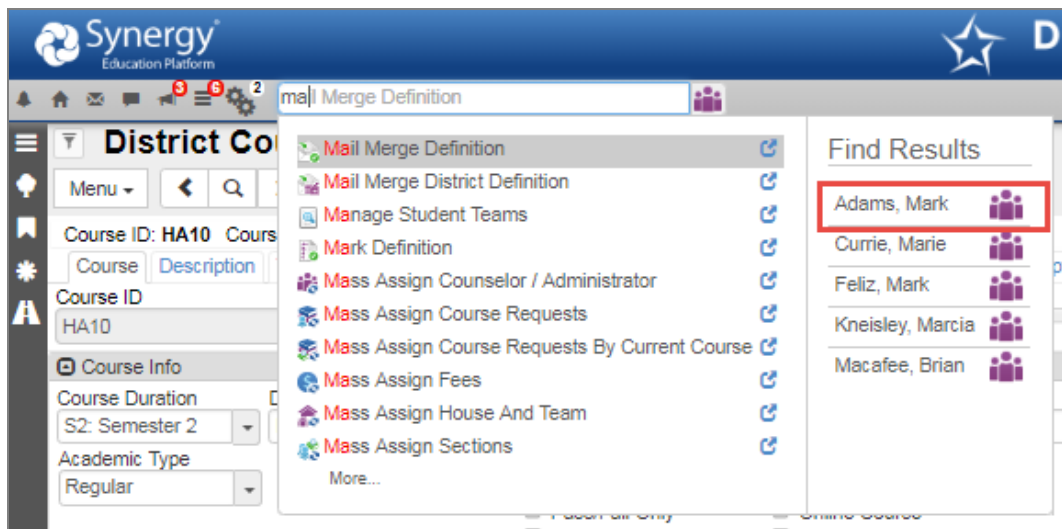
1. Hover over Quick Launch and select .
2. Enter the **Course ID** or **Course Title** until records display under Find Results.
3. Select the course to open the course record in the current screen, or select an icon to open the course record in that screen.



Quick Launch Entities


Using Staff Entity Type

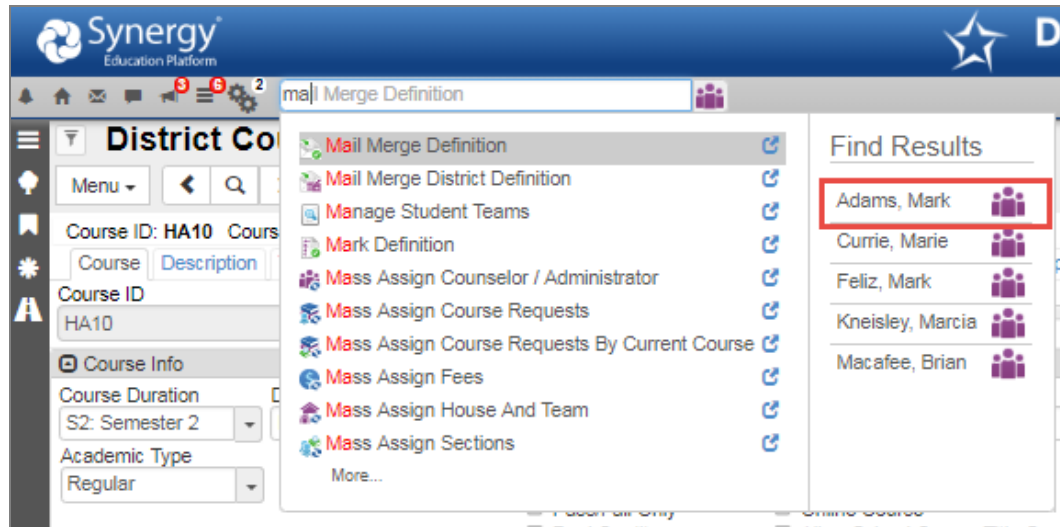
1. Hover over Quick Launch and select .
2. Enter the **Last Name** or the **First Name** until records display under Find Results.
3. Select the staff name to load the staff in the current staff screen, or select an icon to open the staff record in that screen.



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.

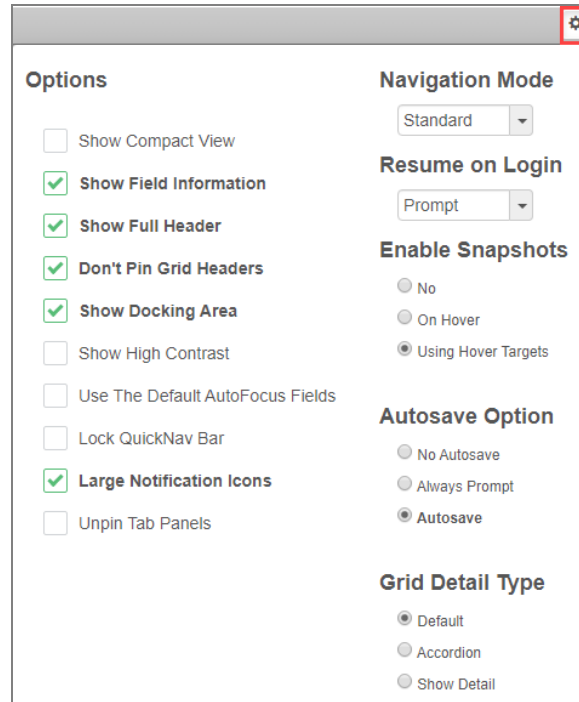


Quick Launch Entities

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.



The screenshot shows the Synergy Options menu with a gear icon in the top right corner. The menu is organized into several sections:

- Options:** A list of checkboxes for various settings: Show Compact View (unchecked), Show Field Information (checked), Show Full Header (checked), Don't Pin Grid Headers (checked), Show Docking Area (checked), Show High Contrast (unchecked), Use The Default AutoFocus Fields (unchecked), Lock QuickNav Bar (unchecked), Large Notification Icons (checked), and Unpin Tab Panels (unchecked).
- Navigation Mode:** A dropdown menu currently set to "Standard".
- Resume on Login:** A dropdown menu currently set to "Prompt".
- Enable Snapshots:** Radio buttons for "No", "On Hover", and "Using Hover Targets" (selected).
- Autosave Option:** Radio buttons for "No Autosave", "Always Prompt", and "Autosave" (selected).
- Grid Detail Type:** Radio buttons for "Default" (selected), "Accordion", and "Show Detail".

Synergy Options

Options

Show Compact View

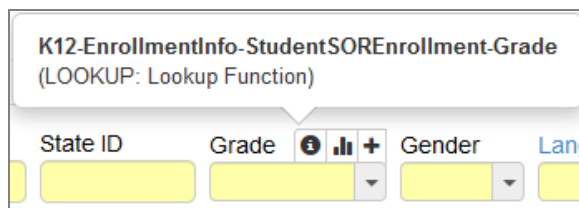
The **Show Compact View** option provides the ability to activate a visual mode that eliminates some of the empty space on the screen, allowing more content to display. Users accessing the system with smaller screens can select this mode to fit as much information as possible on the screen.



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.

The screenshot displays the Synergy SIS interface for a student named Billy C. Abbott. The main form contains fields for Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, and Documents. The Student Information section includes fields for Home Language, Spoken to Student at Home, Nick Name, Last Name Goes By, AKA First Name, AKA Middle Name, AKA Last Name, AKA Suffix, State ID, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, and EdFI ID. A docking panel is visible at the bottom, containing a small profile picture and the following information: Last Name: Abbott, Home Language: Spanish, Perm ID: 905483, Grade: 12. The docking panel is highlighted with a red border.

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

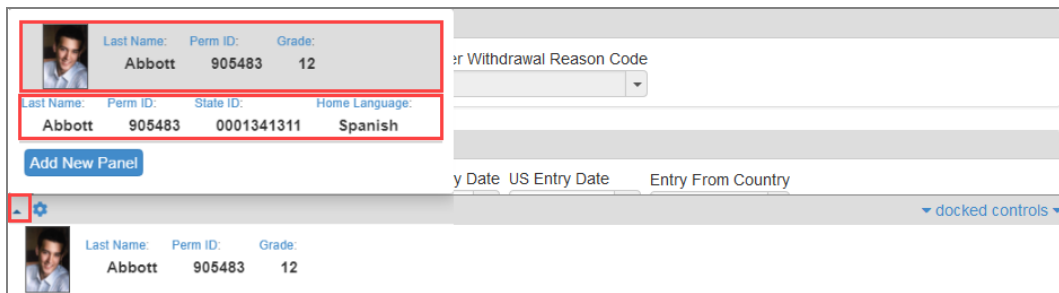
3. Hold the **Ctrl** key to click and drag the required fields to the panel. This outlines the fields in orange.
 - Click and drag the fields within the panel to change their order.
 - Click the **X** in the field to remove it from the panel.

 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.



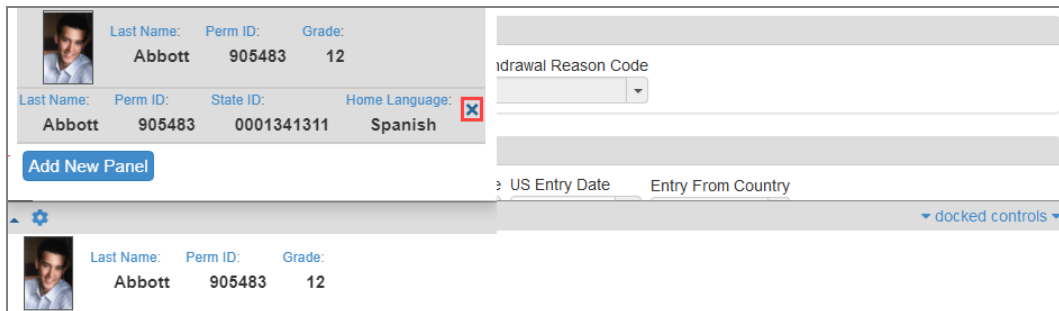
Docking Panel

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

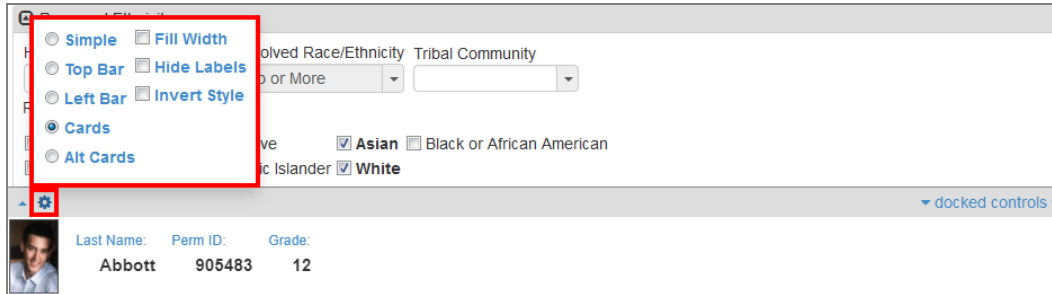
6. Click **docked controls** in the bottom right to show or hide a panel.



Docking Panel

Docking Panel Options

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



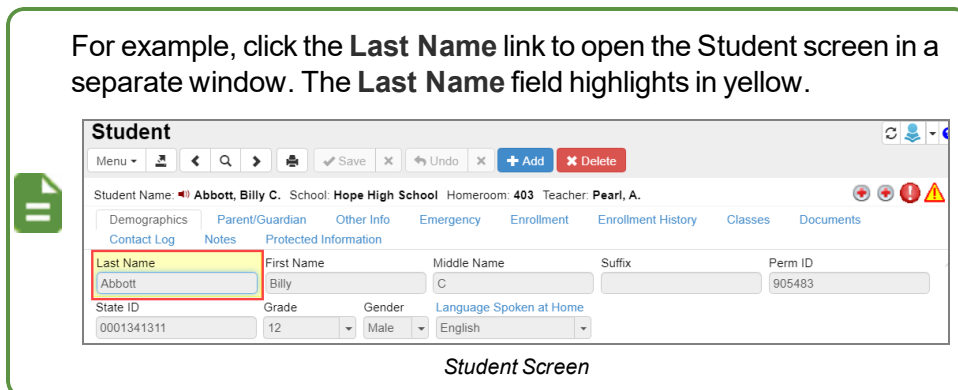
Docking Panel

- **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.



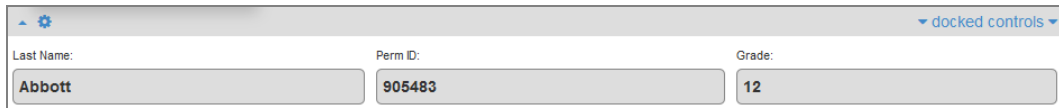
Docking Panel, Cards

- **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.



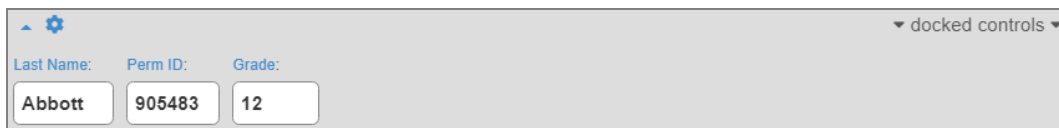
Docking Panel, Fill Width

- **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.

Student Information

Home Language: Spanish | Spoken to Student at Home: English | Nick Name: Junior | Last Name Goes By: []

AKA First Name: [] | AKA Middle Name: [] | AKA Last Name: [] | AKA Suffix: []

State ID: 0001341311 | Birth Date: 03/15/2000 | Birth Place: Mesa | Birth Verification: Birth Certificate or Affidavit | Birth Certificate Num: []

Student Information

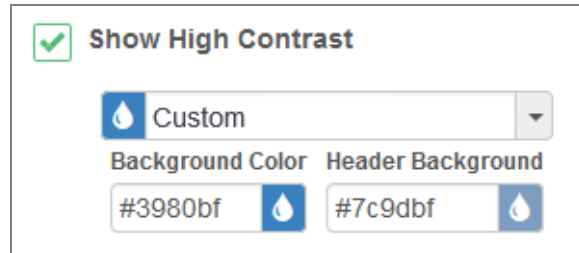
Home Language: **Spanish** | Spoken to Student at Home: **English** | Nick Name: **Junior** | Last Name Goes By: []

AKA First Name: [] | AKA Middle Name: [] | AKA Last Name: [] | AKA Suffix: []

State ID: **0001341311** | Birth Date: **03/15/2000** | Birth Place: **Mesa** | Birth Verification: **Birth Certificate or Affidavit** | Birth Certificate Num: []

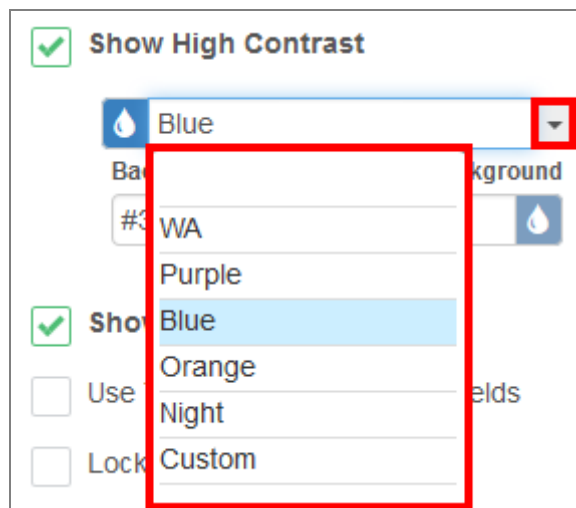
Normal Contrast (Top) Vs. High Contrast (Bottom) Example

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.



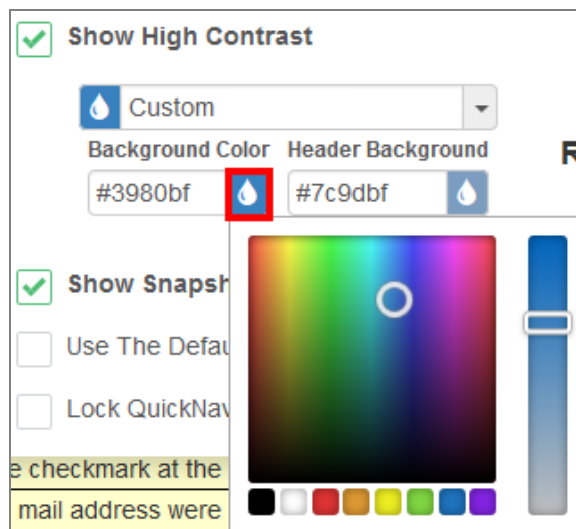
Screen Options Tool

- 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.

The screenshot shows the 'Student Accommodations' interface. At the top, a red box highlights the header information: 'Student Name: Abbott, Billy C. School: Hope High School Homeroom: 403 Teacher: Andrews, M.'. Below this, a modal window titled 'Abbott, Billy C.' is open, displaying the following details:

Perm ID:	905483	State ID:	0001341311
Grade:	12	EdFI ID:	
Email:	billy@mail.qasynergylocalqa05vm.com	Home Address:	1955 S Val Vista Dr
Birth Date:	03/15/2000		Mesa, AZ 85204
Age:	17		

Below the student details, there are buttons for 'Email Parents' and 'Email Teachers'. A 'Map it!' button is also present next to the home address. At the bottom of the modal, the 'Current Class' information is displayed: 'Period: 0 (7:00 AM - 3:30 PM) Room: 231 Section ID: 1116 Course Title: Prin Eng III Staff Name: Gordon, Kim (1061)'. The background shows a table with an 'Exit Reason' column.

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

Student Name: **Abbott, Billy C.** School: **Hope High School** Status: **Active** Homeroom: **231**

Current Classes | Class Enrollment History | Schedule Based FTE

Abbott, Billy C.

Perm ID: 905483 State ID: 0001341311
 Grade: 12 Ed-Fi ID:
 Email: billy@mail.qasynergylocalqa05vm.com Home Address
 Birth Date: 03/15/2000 1955 S Val Vista Dr
 Age: 17 1 Mesa, AZ 85204

Current Class

Attendance Code: **ILL - Illness** Period: **0 (7:00 AM - 3:30 PM)** Room: **403** Section ID: **1006** Course Title: **Beg Jewelry S**

Student Classes Screen

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

Student

Student Name: **Zor-Ei, Kara** School: **Hope High School** Homeroom: **SEM** Teacher: **Evit Teacher, R.** Age: **17** Counselor Name: **Wilson, Rob** Ed-Fi ID: **Custody:**

Demographics | Parent/Guardian | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents | Contact Log | Notes | Protected Information | PSA | New Conference | Test

Last Name	First Name	Middle Name	Suffix	Perm ID	State ID	Grade	Gender	Track	Language Spoken at Home	Allow Ibsuprofen	FTE	FTE
Zor-Ei	Kara			874087	000129737	12	Female					1.00

Zor-Ei, Kara

Perm ID: 874087 State ID: 000129737
 Grade: 12 Ed-Fi ID:
 Email: Kara.Zor-Ei@mail.qasynergylocalqa05vm.com Home Address
 Birth Date: 12/15/2001 2656 E Minion St
 Age: 17 Tempe, AZ 85662

Current Class

The first scheduled class for this student has not started
 Period: **1 (9:06 AM - 9:33 AM)** Room: **SEM** Section ID: **0991** Course Title: **Study Hall** Staff Name: **Evit Teacher, Rei T Per**

Contacts

Line	Name	Phone Number	Relationship	Call Order	Type
1	Zor-Ei, Kara	480-555-3699	Self		Student
2	Kanaga, Andrea	480-555-3699	Mother		Parent
3		480-555-9703			Parent
4	Kanaga, Larry	602-555-8920	Father		Parent
5		602-555-2366			Parent
6		480-555-3699			Parent
7	Cody Young	480-921-7964	Grand-Mother		Emergency

Mail Address

Address: 2656 E Minion St
 City: Tempe State: AZ Zip Code: 85662

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 on 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 | Menu | Save | Undo | Add | Delete

Student Name: **Aaron, Ian** School: **Adams Elementary** Homeroom: **0002** Teacher: **Carroll, N.**

Demographics | **Parent/Guardian** | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents | Contact Log | Notes

Protected Information | TR Test Tab

Last Name: Aaron | First Name: Ian | Middle Name: | Suffix: | Perm ID: 129442 | Grade: 04 | Track: |

Parents and Guardians | + Add | Show Detail | ...

Line	Order	Lives With	Relation	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailing Allowed
1		<input checked="" type="checkbox"/>	Grandfather	Abbott, GP	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2		<input type="checkbox"/>	Step-Father	Jones, Jonathon			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	1	<input checked="" type="checkbox"/>	Mother	Aaron, K	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	2	<input type="checkbox"/>	Father	Aaron, P			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Siblings

Line	Student Name	Gender	Street
1	Aaron, Susan	Female	5407 N Alma School Rd
2	Aaron, Theresa	Female	5407 N Alma School Rd
3	Abbott, Billy C.	Male	5407 N Alma School Rd

Aaron, P

No Photo | Gender: Male | PVUE ID: Parent1234
 Adult ID: | Last Accessed: 10/04/2016
 On file | Email: parent12345@mail.qasynergylocalqa05vm.com

Home Address: 5407 N Alma School Rd, Mesa, AZ 85204
 Mail Address: 5407 N Alma School Rd, Mesa, AZ 85204
 Work Address: 1955 S Val Vista Dr, Phoenix, AZ 85694

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**

The screenshot shows the 'Class Daily Attendance' interface. At the top, it displays 'Section ID: 0102' and 'Course Title: 3rd Grade'. Below this, there are input fields for 'Section ID' (0102), 'Course ID' (0300), 'Course Title' (3rd Grade), 'Staff Name' (Carroll, Natalie), 'Room Name' (0002), and 'Track'. A 'Begin Valid Date Range' is set to '07/04/2016'. A 'Class Attendance' table is visible, with columns for 'Line', 'Student Name', 'Attendance Reason', and 'Amount'. A staff snapshot for 'Carroll, Natalie' is overlaid on the screen, showing her profile picture, E-Mail address (person@mail.qasynergylocalqa05vm.com), Badge Num (2002), Gender (Female), and Type (Teacher). Below the snapshot, there are checkboxes for 'Staff Role' categories: Audiology, Conference, Discipline, Health, Rater, and Transportation.

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

Section ID: 0102 Course Title: 3rd Grade

Class Daily Attendance

Section ID: 0102 Course ID: 0300 Course Title: 3rd Grade Staff Name: Carroll, Natalie Room Name: 0002 Track: [Dropdown]

0102 - 3rd Grade

Teacher: Carroll, Natalie Total Female: 12
 Room: 0002 Total Male: 17
 Period: 1 - 1 Total Students: 29
 Term Code: YR Open Seats: 11
 TA Total: 0

Line	Student Name	Wed, May 3 2017		Thu, May 4 2017		Fri, May 5 2017	
		Attendance 1	Attendance 2	Attendance 1	Attendance 2	Attendance 1	Attendance 2
1		X	X	X	X	X	X
2	Aaron, Ian	Unv	0.50	Unv	0.50	Unv	0.50
3	Alejandroz, Willie JR						
4	Antonio Gonzalez, James D.						

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

Section ID: 0102 Course Title: 3rd Grade

Class Daily Attendance

Section ID: 0102 Course ID: 0300 Course Title: 3rd Grade Staff Name: Carroll, Natalie Room Name: 0002 Track: [Dropdown]

3rd Grade

Department: Elementary&School College Prep:
 Course Duration: YR Academic Type: Regular
 Credit: 1.000
 Grade Range: 03 - 04
 Description: Third Grade

Line	Student Name	Thu, May 4 2017		Fri, May 5 2017	
		Attendance 1	Attendance 2	Attendance 1	Attendance 2
1		X	X	X	X

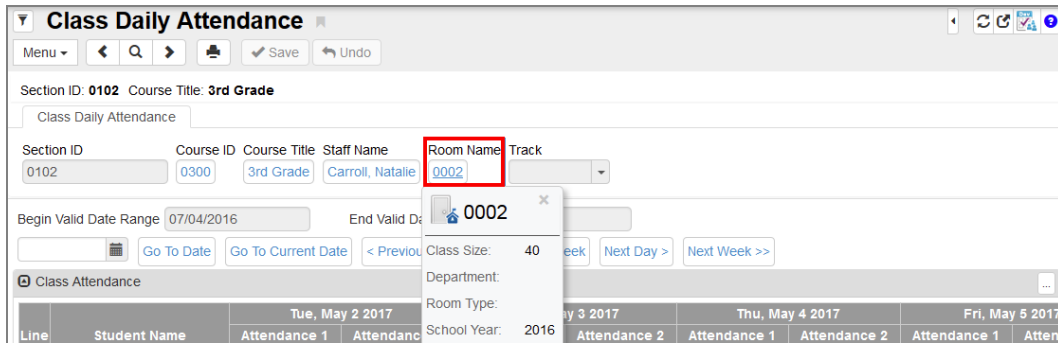
Class Daily Attendance Screen

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**



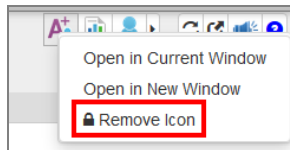
Class Daily Attendance Screen

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.

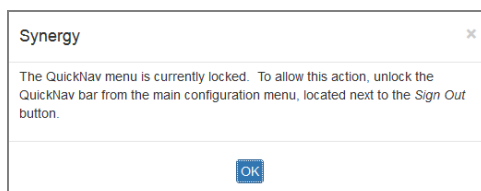
Lock Quick Nav Bar

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



Edit QuickNav Bar

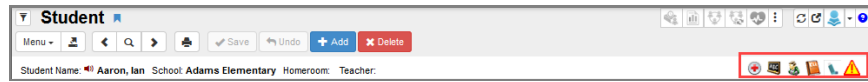
Clicking **Remove Icon** displays a message that states you must clear the option to remove the icon from the QuickNav Bar.



System Message

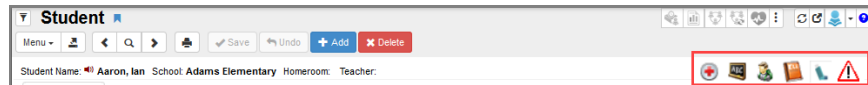
Large Notification Icons

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.

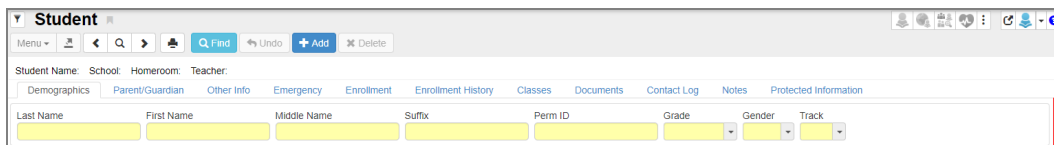


Student Screen

Unpin Tab Panels

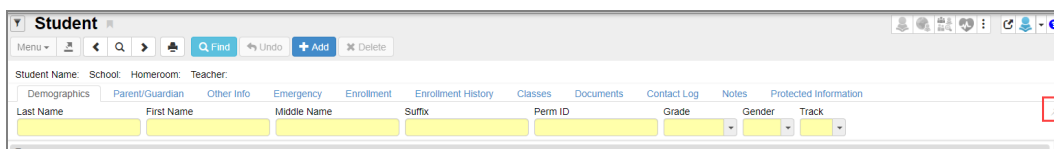
You can unpin tab panels using the **Unpin Tab Panel** option in the Synergy Options menu or by clicking the  icon on an individual tab panel. Both options allow you to set preferences for all tab panels.

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




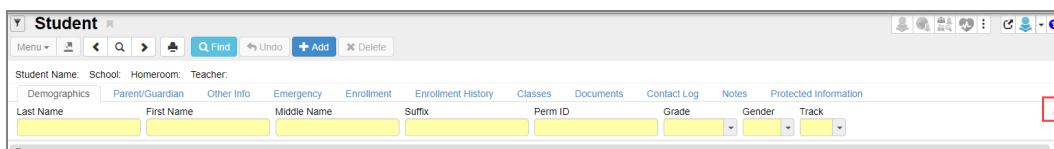
Student Screen

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.



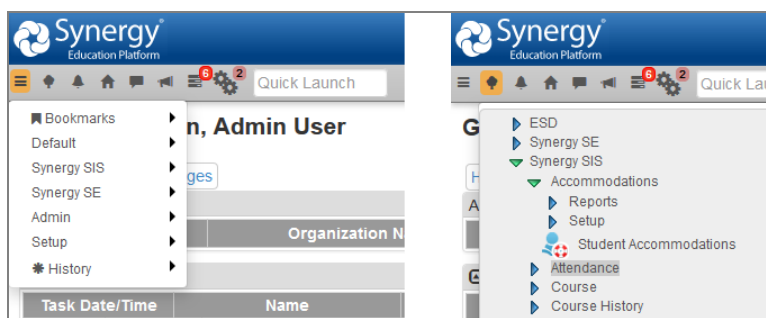
Student Screen

Navigation Mode

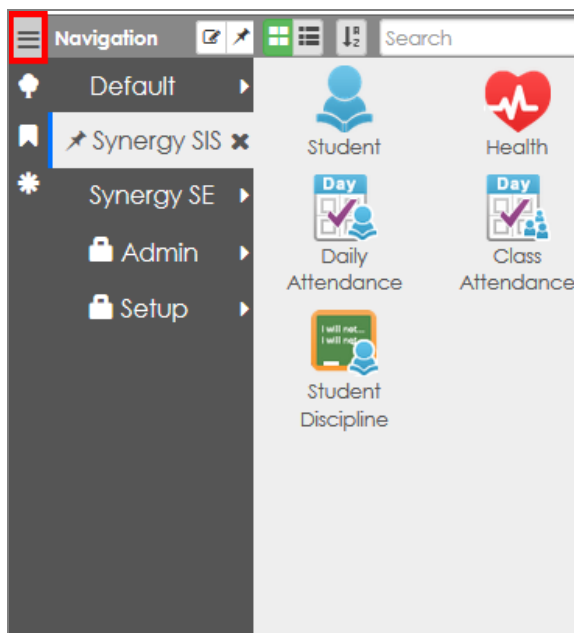
- *Standard* – The default appearance of Synergy
- *Accessible* – This option changes the interface for compatibility with screen reader programs, such as JAWS. Navigation options display at the top of the screen and there are no sidebar elements. See [Synergy Accessibility](#) for more information.



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

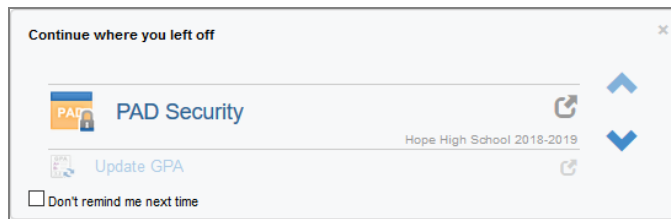


Standard Example

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.




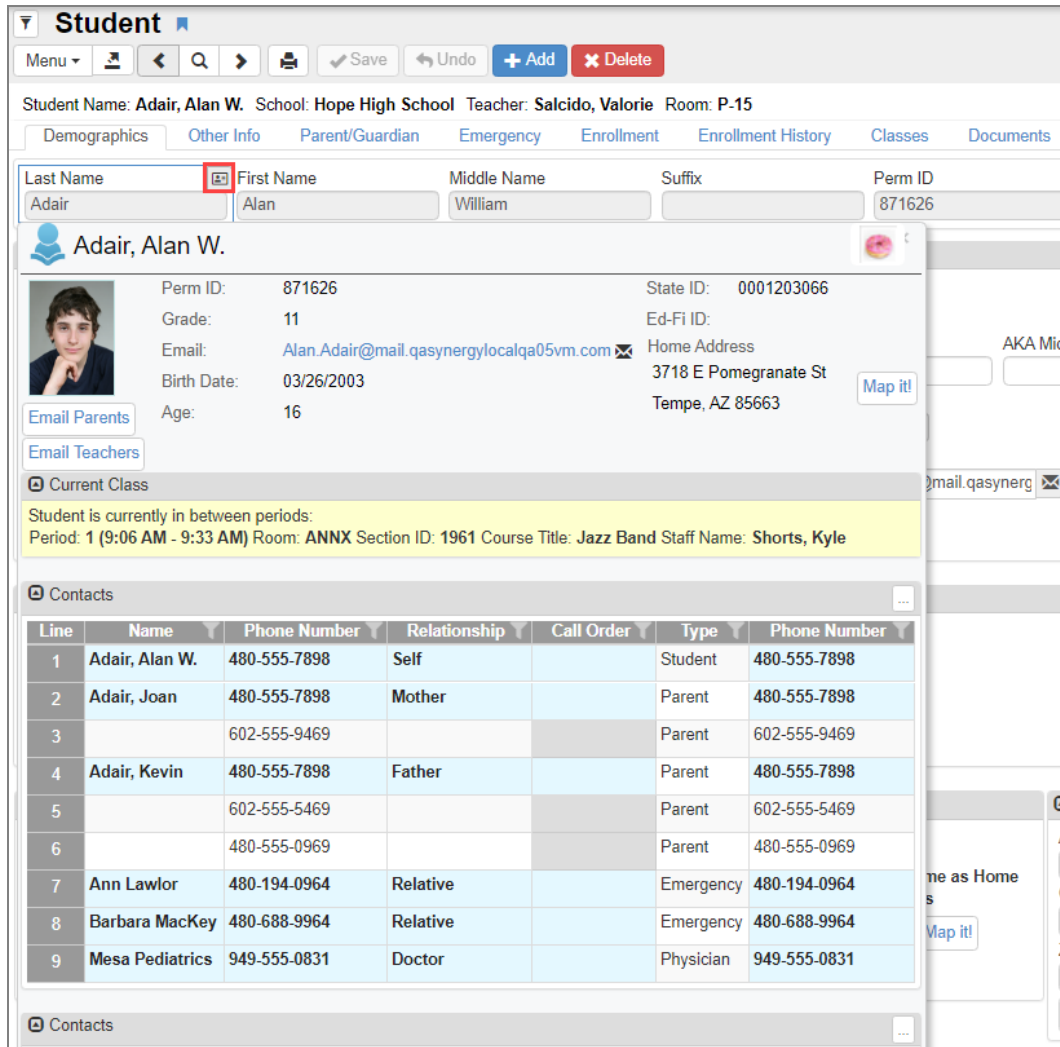
Resume On Login Prompt

- *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



Menu      Save  Undo  Add  Delete

Student Name: Adair, Alan W. School: Hope High School Teacher: Salcido, Valorie Room: P-15

Demographics **Other Info** Parent/Guardian Emergency Enrollment Enrollment History Classes Documents

Last Name: Adair First Name: Alan Middle Name: William Suffix: Perm ID: 871626

Adair, Alan W.

 Perm ID: 871626 State ID: 0001203066
 Grade: 11 Ed-Fi ID:
 Email: Alan.Adair@mail.qasynergylocalqa05vm.com Home Address: 3718 E Pomegranate St
 Birth Date: 03/26/2003 Tempe, AZ 85663 
 Age: 16

[Email Parents](#) [Email Teachers](#)

Current Class

Student is currently in between periods:
 Period: 1 (9:06 AM - 9:33 AM) Room: ANNX Section ID: 1961 Course Title: Jazz Band Staff Name: Shorts, Kyle

Contacts

Line	Name	Phone Number	Relationship	Call Order	Type	Phone Number
1	Adair, Alan W.	480-555-7898	Self		Student	480-555-7898
2	Adair, Joan	480-555-7898	Mother		Parent	480-555-7898
3		602-555-9469			Parent	602-555-9469
4	Adair, Kevin	480-555-7898	Father		Parent	480-555-7898
5		602-555-5469			Parent	602-555-5469
6		480-555-0969			Parent	480-555-0969
7	Ann Lawlor	480-194-0964	Relative		Emergency	480-194-0964
8	Barbara MacKey	480-688-9964	Relative		Emergency	480-688-9964
9	Mesa Pediatrics	949-555-0831	Doctor		Physician	949-555-0831

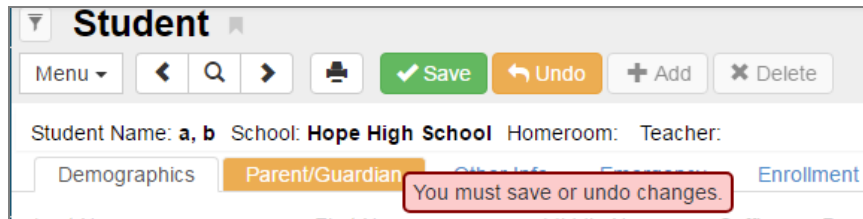
Contacts

Student Screen (Snapshot View)

Autosave Option

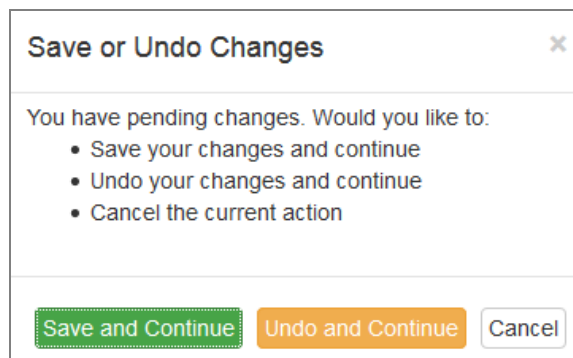
The **Autosave Option** feature saves data when navigating to different tabs or screens.

- *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.

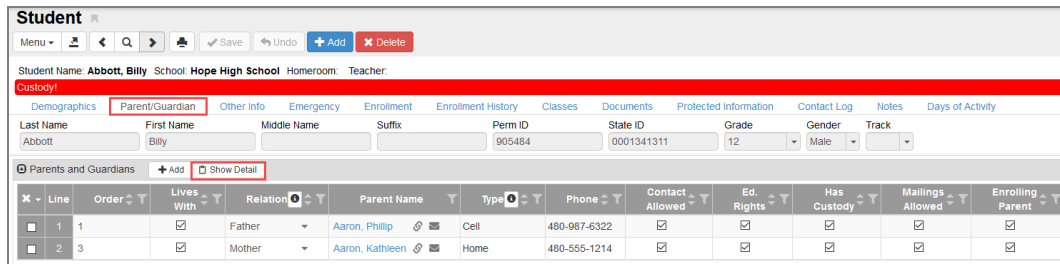
 The grids do not display the **Show Detail** button.

- **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.

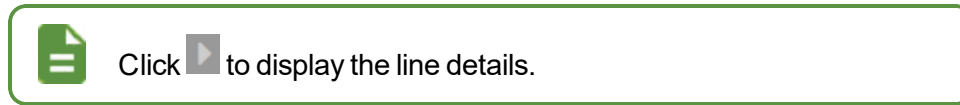
- With the Blank or **Show Detail** option selected



Line	Order	Lives With	Relation	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Enrolling Parent
1	1	<input checked="" type="checkbox"/>	Father	Aaron, Phillip	Cell	480-987-6322	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	3	<input checked="" type="checkbox"/>	Mother	Aaron, Kathleen	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Student Screen, Parent/Guardian Tab

- With the *Accordion* option selected



Student

Menu | Save | Undo | Add | Delete

Student Name: **Abbott, Billy** School: **Hope High School** Homeroom: Teacher:

Custody!

Demographics | **Parent/Guardian** | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents | Protected Information | Contact Log | Notes | Days of Activity

Last Name: Abbott First Name: Billy Middle Name: Suffix: Perm ID: 905484 State ID: 0001341311 Grade: 12 Gender: Male Track:

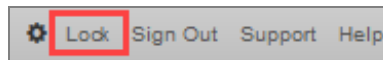
Parents and Guardians + Add

Line	Order	Lives With	Relation	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Enrolling Parent
1		<input checked="" type="checkbox"/>	Father	Aaron, Phillip	Cell	480-987-6322	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	3	<input checked="" type="checkbox"/>	Mother	Aaron, Kathleen	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>


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

Please enter your password below to log back into the application.

User
Admin User

Password


Contact Us
Edupoint®

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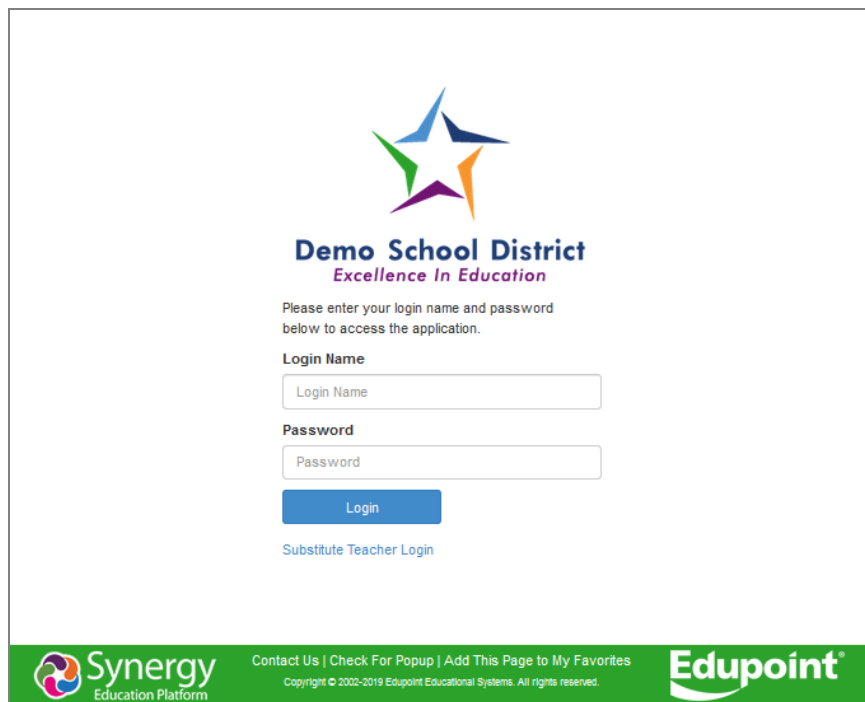
Lock Screen

Sign Out

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



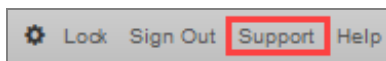
Sign Out Icon



Sign Out Screen

Support

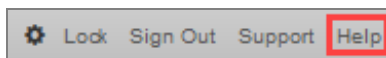
This links to a page with information about how to receive support for the Synergy SIS system. Each district can customize this page.



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.



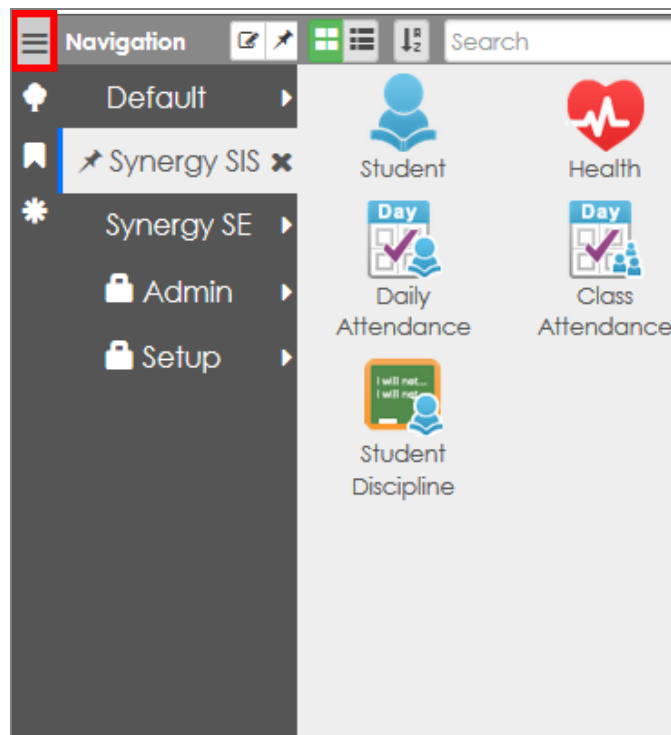
Help Icon

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 – .

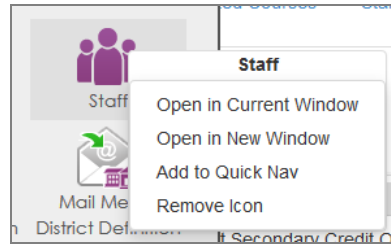
Navigation

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.



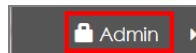
Standard (Left) Navigation Menu Example

- 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.



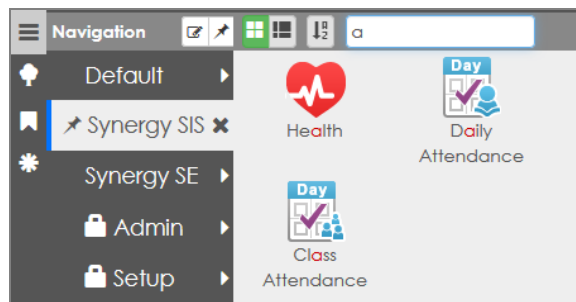
Synergy Navigation Menu, Standard Mode

- 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

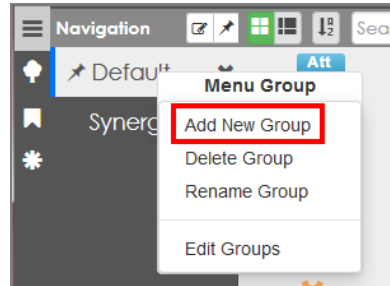
- Click to view the group by icons.
- Click to view the group by list.
- Click to sort the group A-Z.
- Start typing the name of a screen in the **Search** and the system filters down the list.



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**.



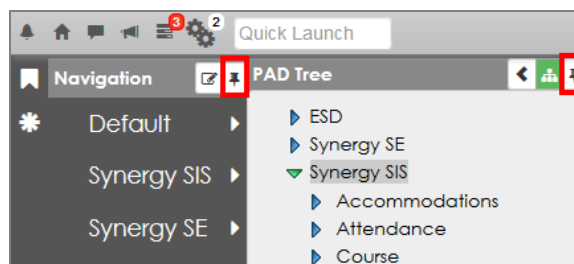
Newly added groups are automatically named **Default**.

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

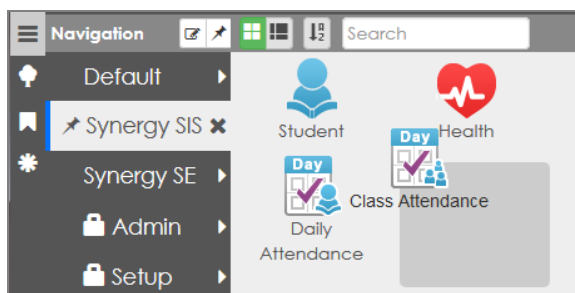
1. Pin both the **Navigation** and **PAD Tree** panels open.



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.



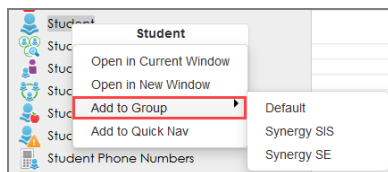
Synergy Navigation Menu – Standard Mode

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

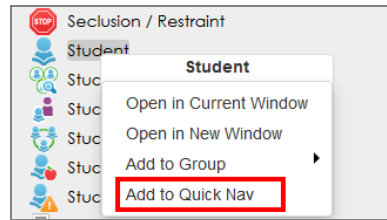
Similar to the Navigation panel, the Quick Nav bar is a great place for frequently accessed screens. It is more helpful as you become familiar with the icons for the different screens.

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.

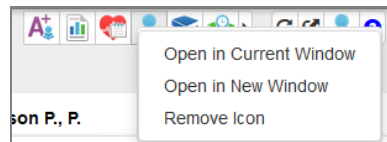
2. Select *Add to Quick Nav*.



Synergy PAD Tree

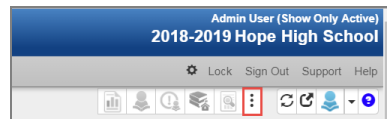
3. Right-click on the screen name or icon and additional options display.

- *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




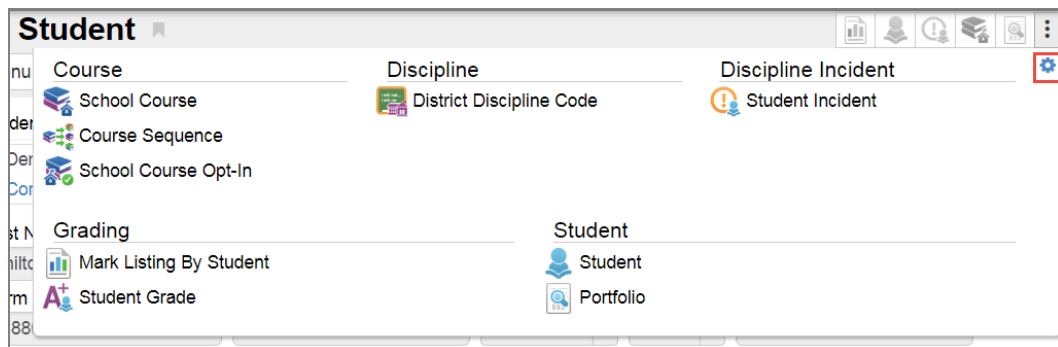
Synergy Quick Nav Bar

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



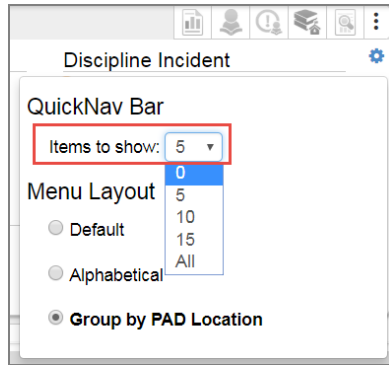
Synergy Quick Nav Bar

5. Click  to open the Quick Nav panel.



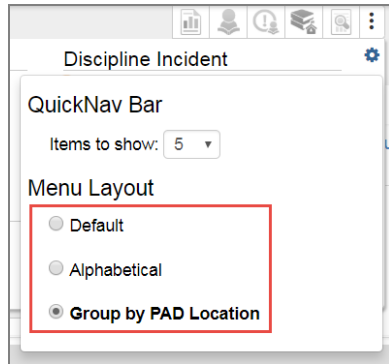
Quick Navigation Panel

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



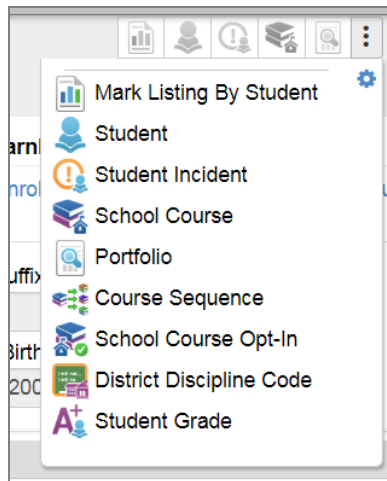
Quick Nav Options Menu

7. Select the **Menu Layout**.



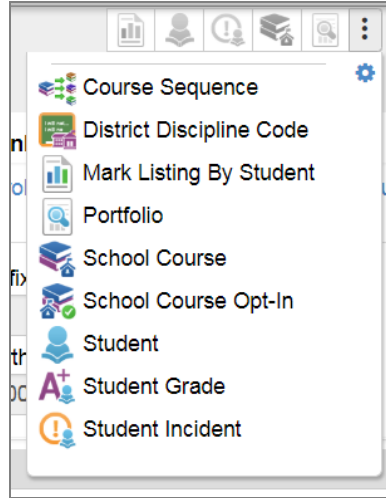
Quick Nav Options Menu

- *Default* – Screen names display in a list



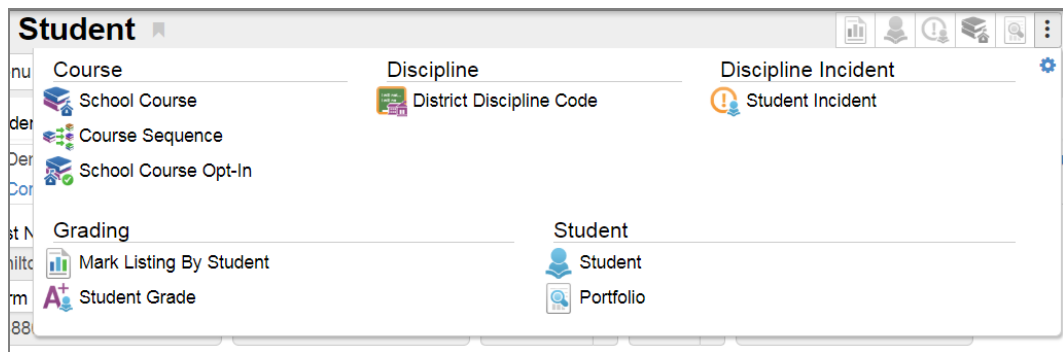
Any Synergy Screen

- *Alphabetical* – Screen names display listed alphabetically



Any Synergy Screen

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



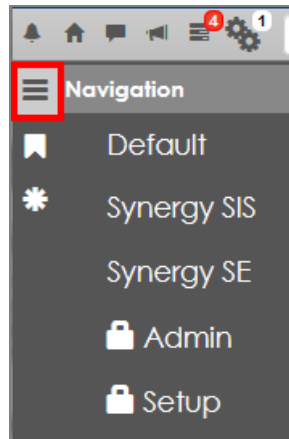
Any Synergy Screen

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.

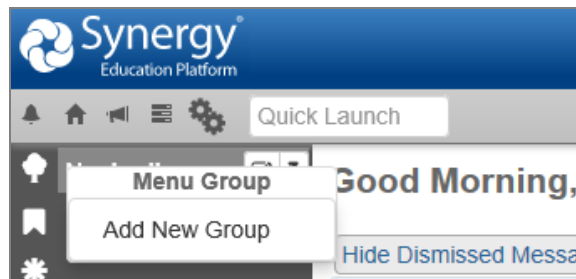
Adding Navigation Groups

1. Click the **Navigation** menu.




Navigation Menu

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

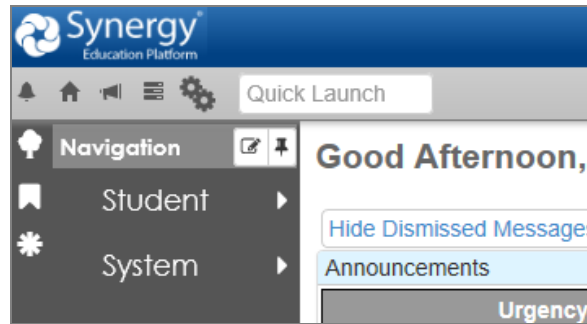


Navigation Menu, Menu Group

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.

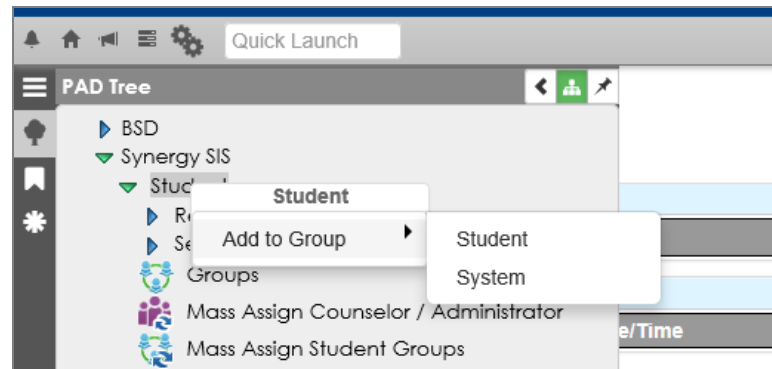


Navigation Menu

Adding Group Items – PAD Tree

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

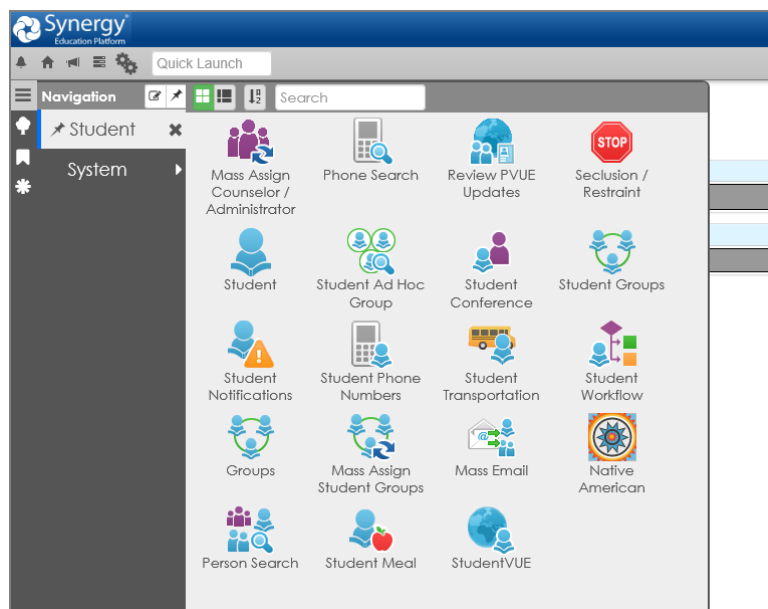
1. Navigate to **Synergy SIS > Student** in the PAD Tree menu.
2. Right-click on the **Student** module name.
3. Hover over **Add to Group** to view the created groups.



PAD Tree Menu

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

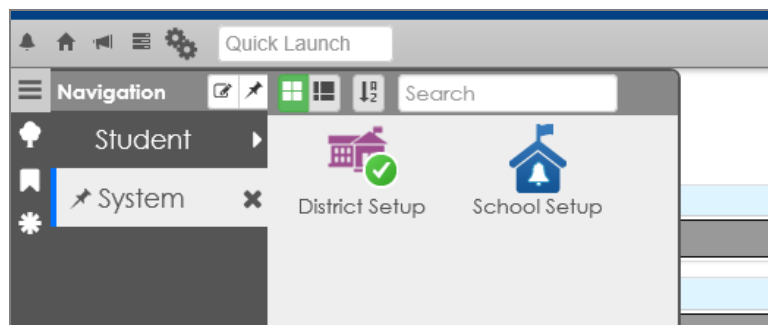
5. Open the Navigation Menu and hover over the **Student** group to display the group items.



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.

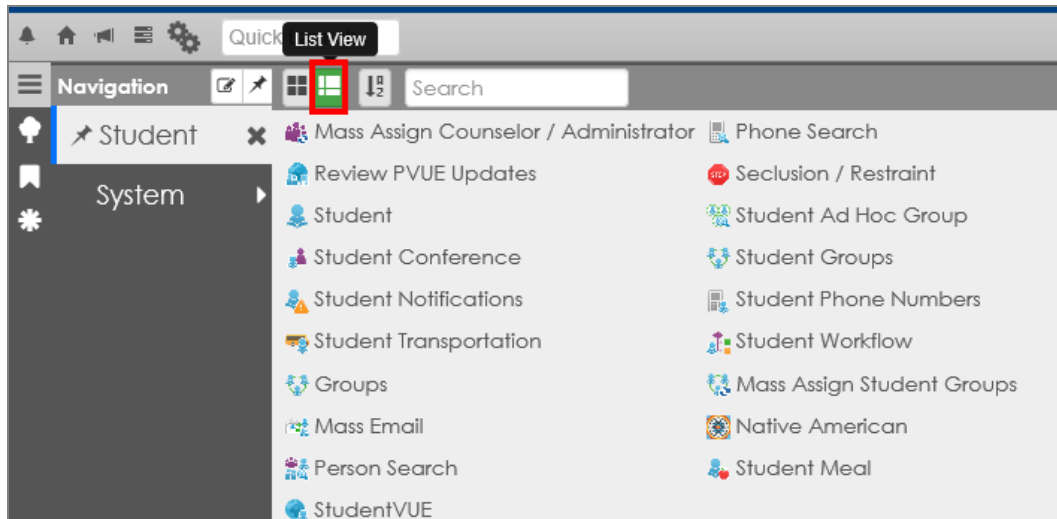


Navigation Menu, Custom Group

Displaying Menu Items

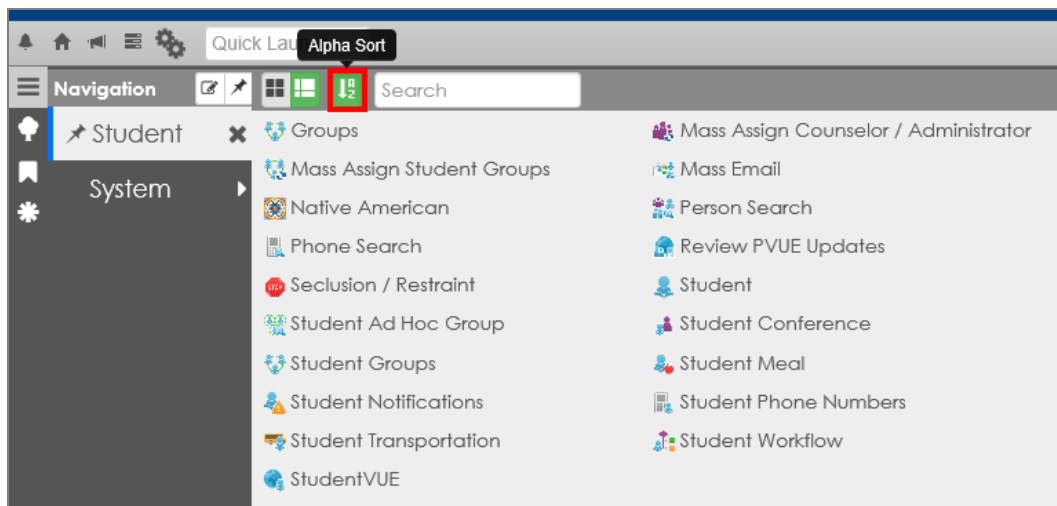
You can display group menu items as icons or as a list and change their layout inside the menu.

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.



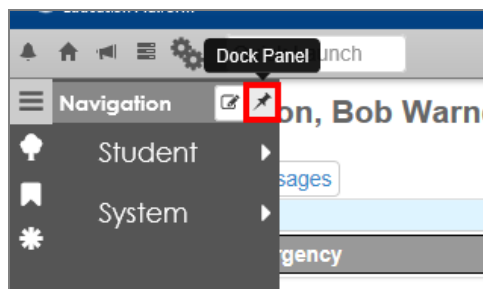
Navigation Menu, Custom Group

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




Navigation Menu, Custom Group

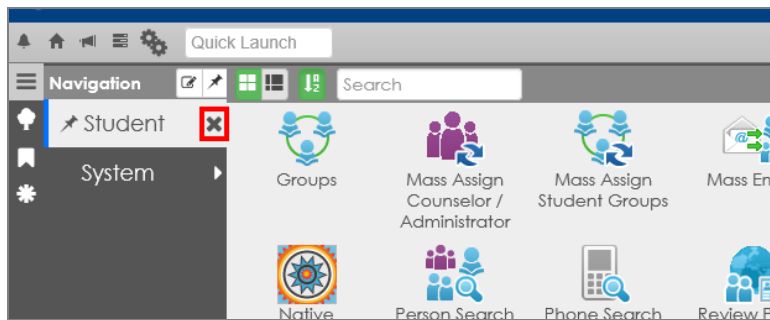
5. Click the **Navigation** icon and click on the Dock Panel icon to keep the group name window open. Click the icon again to undock the window.



Navigation Menu

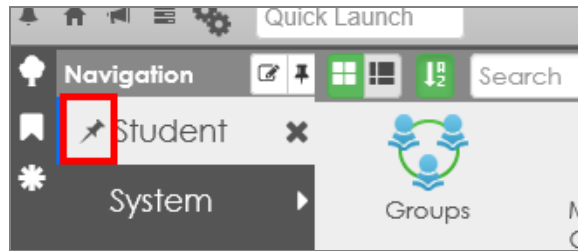
6. Click the **X** to the right of the Group name to hide menu items.

 This does not remove items from the group.



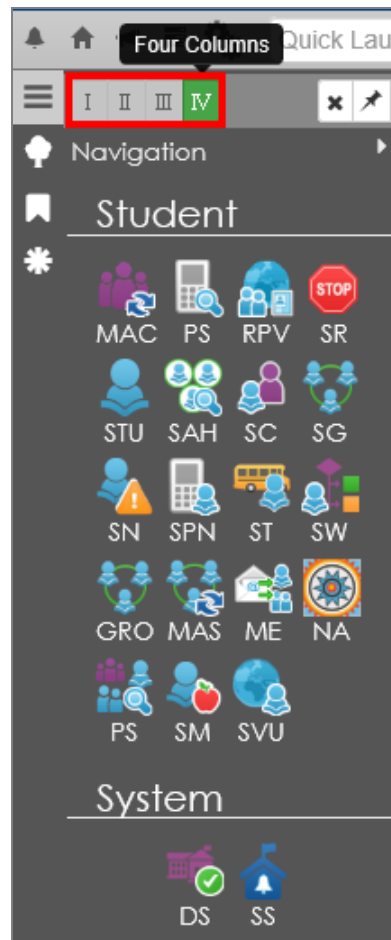
Navigation Menu, Custom Group

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.



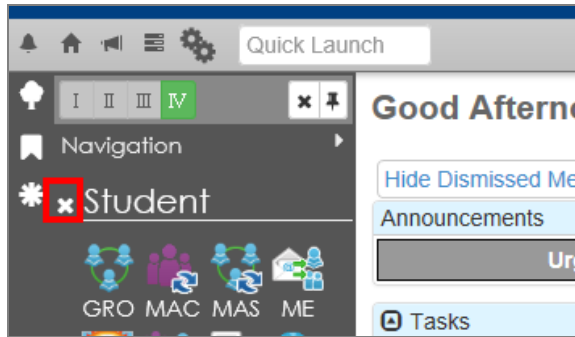
Navigation Menu

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



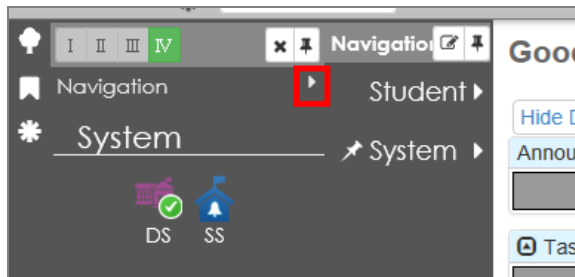
Navigation Menu, Custom Group

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



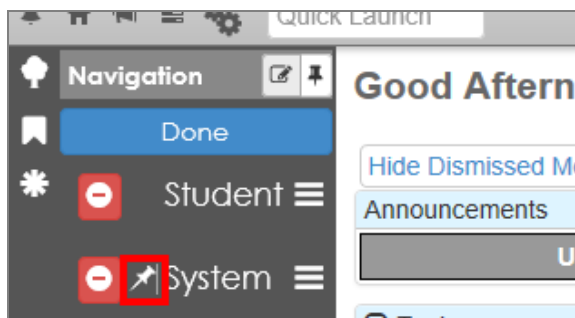
Navigation Menu

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.

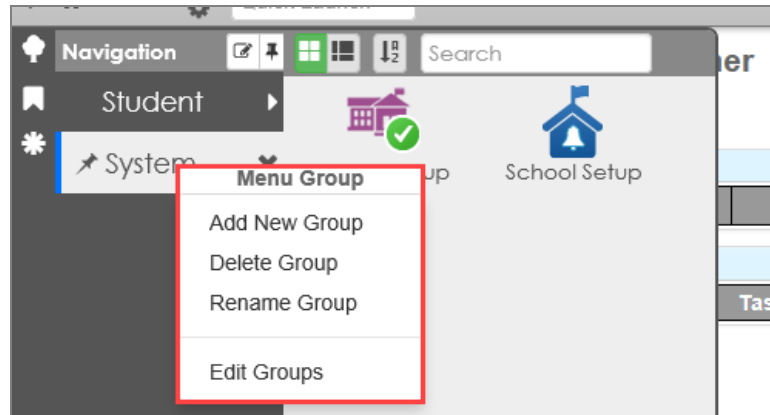


Navigation Menu

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

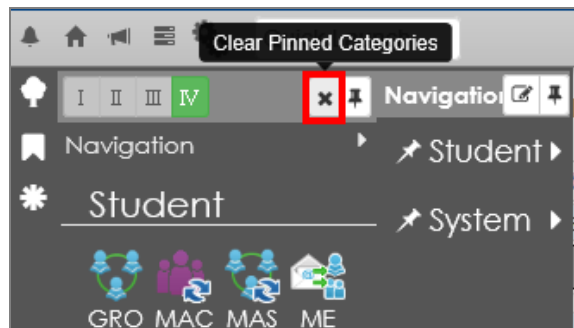


The **Edit Groups** option functions the same way as clicking the Edit Groups icon.



Navigation Menu, Custom Group

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



Clear Pinned Categories Icon

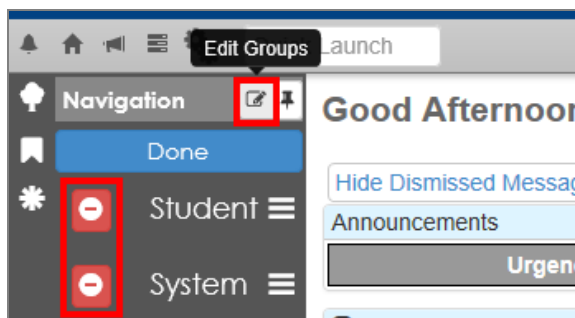
Deleting Groups and Menu Items

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



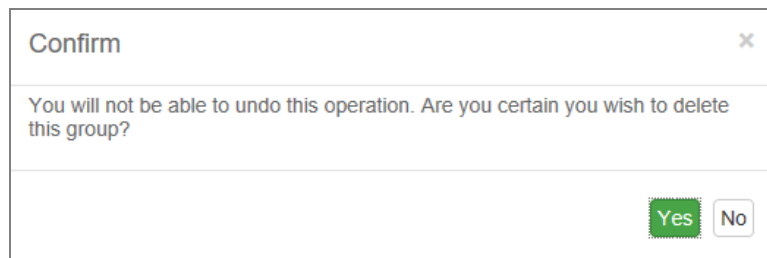
Hide the Delete Group icons by clicking the Docking icon next to the group name or clicking **Done**.

2. Click the Delete Group icon.



Navigation Menu

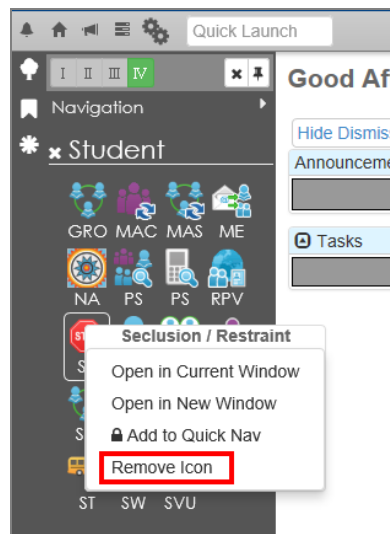
3. Click **Yes** on the confirmation message.



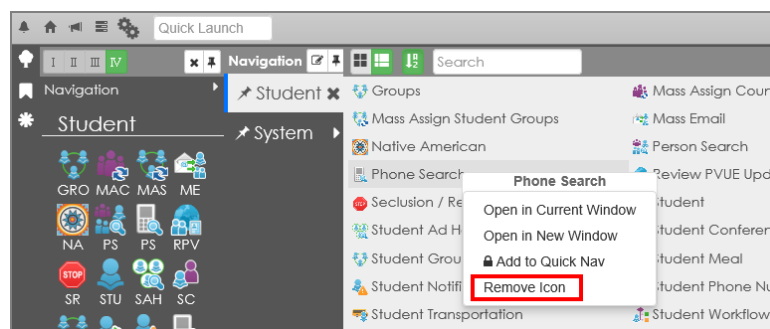
Confirm Message

4. Right-click on a menu icon.

5. Click **Remove Icon**.

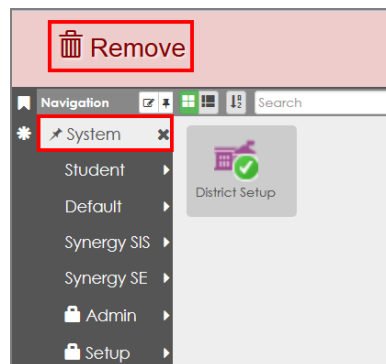


Navigation Menu



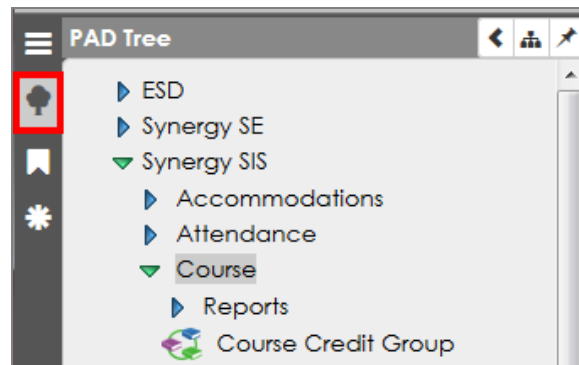
Navigation Menu

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



Navigation Menu, Custom Group

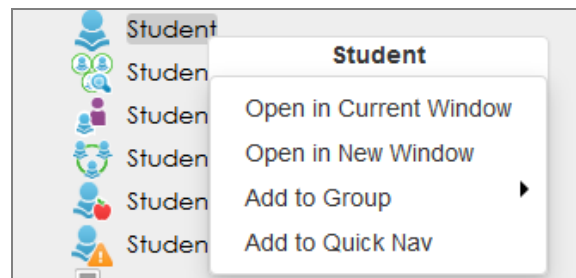
PAD Tree Menu



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

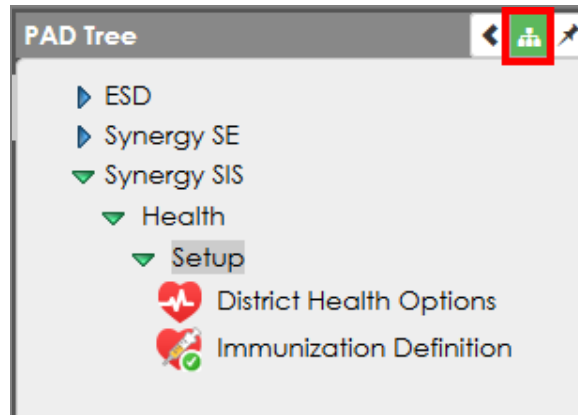
- *Open in Current Window* – Opens the screen in the content area
- *Open in New Window* – Opens the screen in a new detached window.
- *Add to Group* – Places an icon link in the selected Navigation Toolbar group.
- *Add to Quick Nav* – If this option is available, it places an icon link above in the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

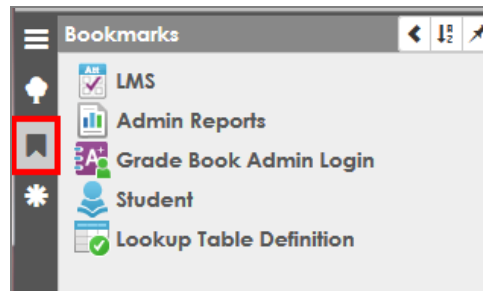
- The Only Show the Active Node icon is green when enabled and shows only the currently selected node in the PAD Tree instead of all the nodes.



PAD Tree

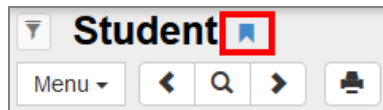
- The Only Show the Active Node icon is the default color when disabled and shows all nodes in the PAD Tree instead of just the currently selected node.

Bookmarks Menu



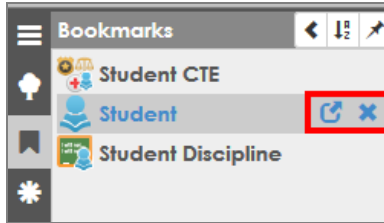
Synergy Bookmarks Panel And Button

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.

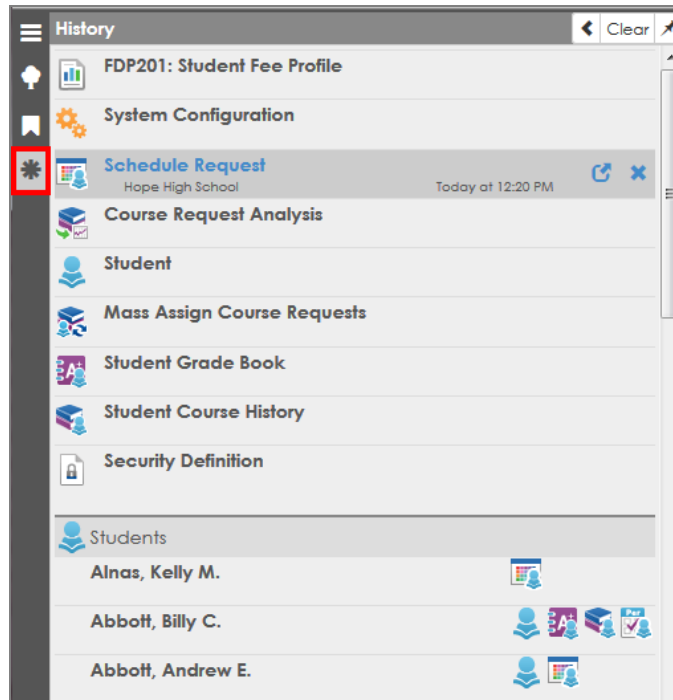


Synergy Bookmarks Panel

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

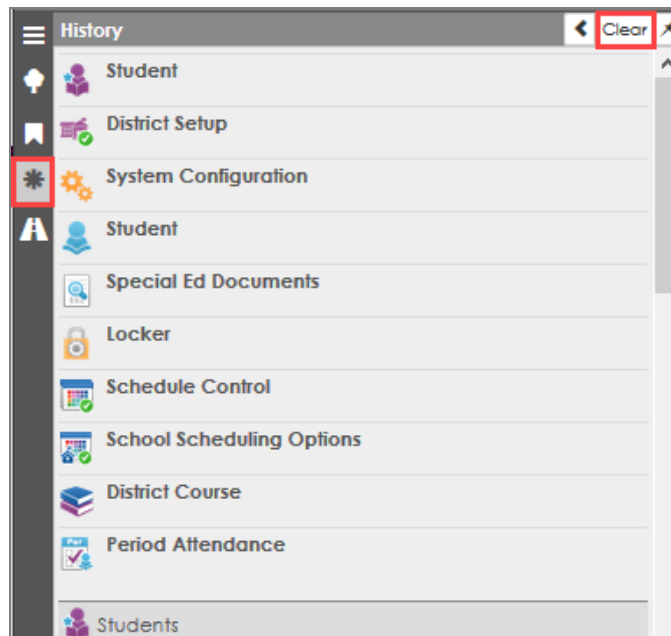
Scrolling through students, parents, users, or staff adds them to the History Panel in the order selected.

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.





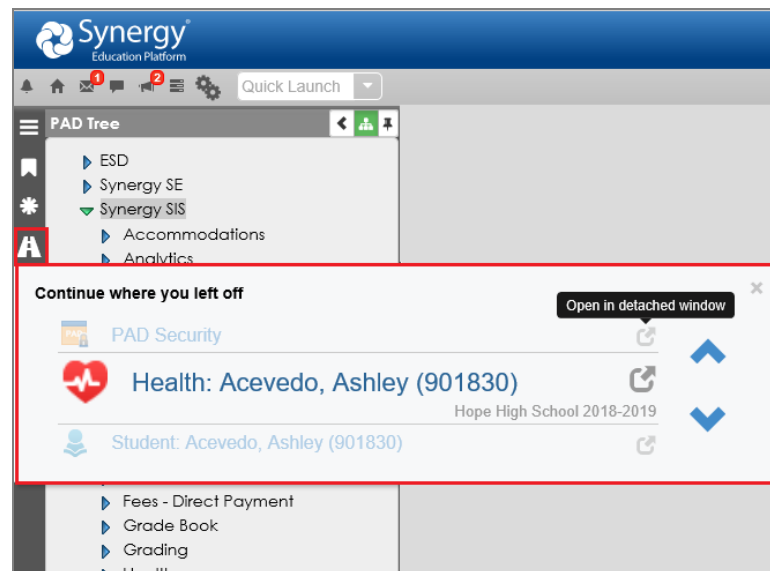
Clearing the history clears the recent history and the **Focus History**.

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  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  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.



Emergency Contacts										...	+ Add	Show Detail
X	Line	Order	Relationship	Name	Release To	Home		Work		Mobile Phone		
						Phone	Extn	Phone	Extn			
	1	2	Friend	Christopher Johns	<input checked="" type="checkbox"/>	480-555-7788		602-555-1234	512			
	2	4	Relative	Lauretta Jones	<input type="checkbox"/>	480-555-1545						
	3	5	Friend	Darryl King	<input type="checkbox"/>	480-555-1962						

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.

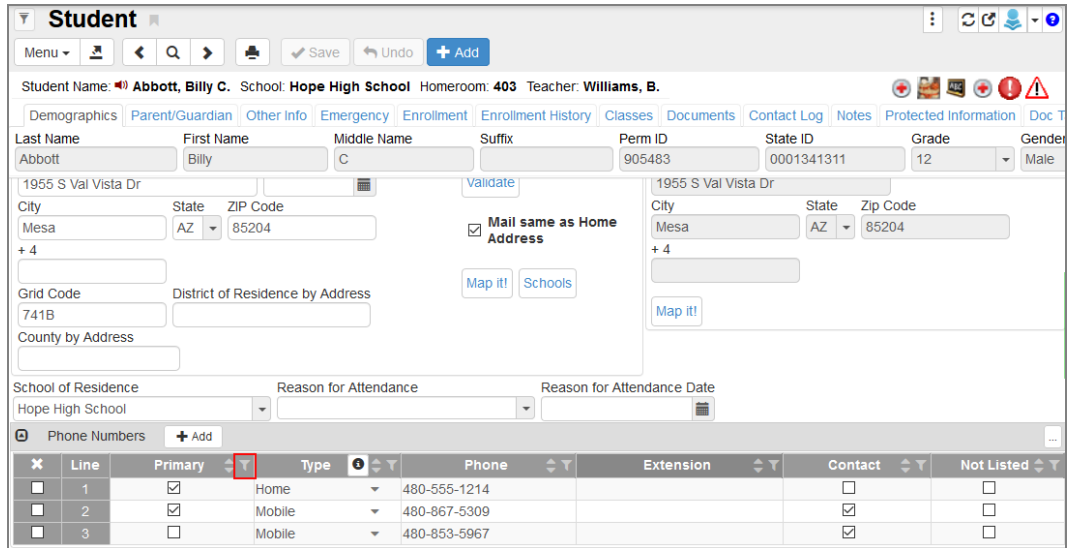


The customized sort order is not saved and the grid reverts to the default sort if you bring another screen into focus. The sort order saves when switching between tabs of the same screen.

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

Student Name: **Abbott, Billy C.** School: **Hope High School** Homeroom: **403** Teacher: **Williams, B.**

Demographics | Parent/Guardian | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents | Contact Log | Notes | Protected Information | Doc T

Last Name: Abbott First Name: Billy Middle Name: C Suffix: Per ID: 905483 State ID: 0001341311 Grade: 12 Gender: Male

1955 S Val Vista Dr City: Mesa State: AZ ZIP Code: 85204 +4: Grid Code: 741B District of Residence by Address: County by Address: School of Residence: Hope High School Reason for Attendance: Reason for Attendance Date:

Phone Numbers

Line	Primary	Type	Phone	Extension	Contact	Not Listed
1	<input checked="" type="checkbox"/>	Home	480-555-1214		<input type="checkbox"/>	<input type="checkbox"/>
2	<input checked="" type="checkbox"/>	Mobile	480-867-5309		<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>	Mobile	480-853-5967		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Student Screen

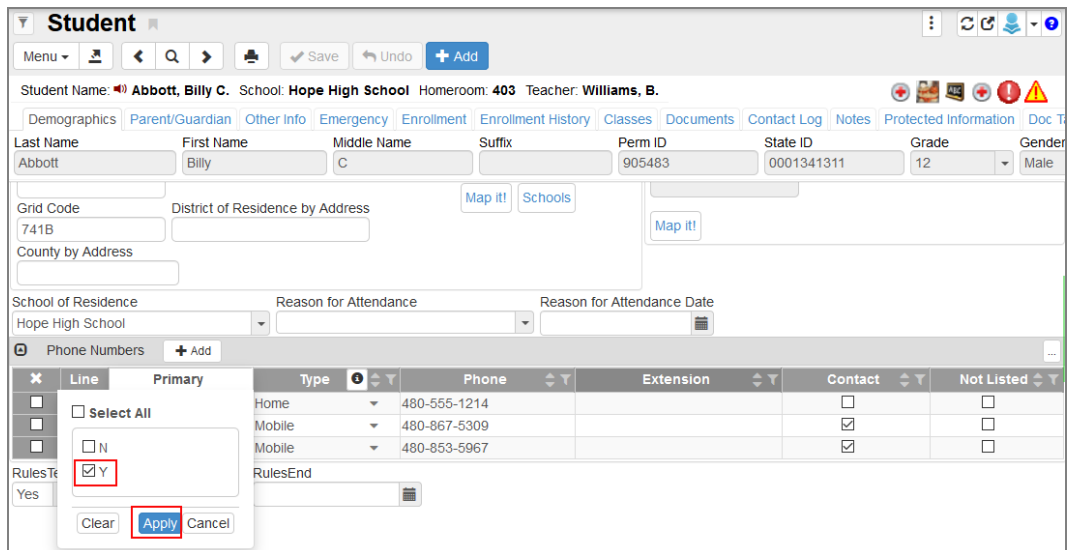
3. Select an option to display only those phone numbers that satisfy the selection.



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

Student Name: **Abbott, Billy C.** School: **Hope High School** Homeroom: **403** Teacher: **Williams, B.**

Demographics | Parent/Guardian | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents | Contact Log | Notes | Protected Information | Doc T

Last Name: Abbott First Name: Billy Middle Name: C Suffix: Per ID: 905483 State ID: 0001341311 Grade: 12 Gender: Male

Grid Code: 741B District of Residence by Address: County by Address: School of Residence: Hope High School Reason for Attendance: Reason for Attendance Date:

Phone Numbers

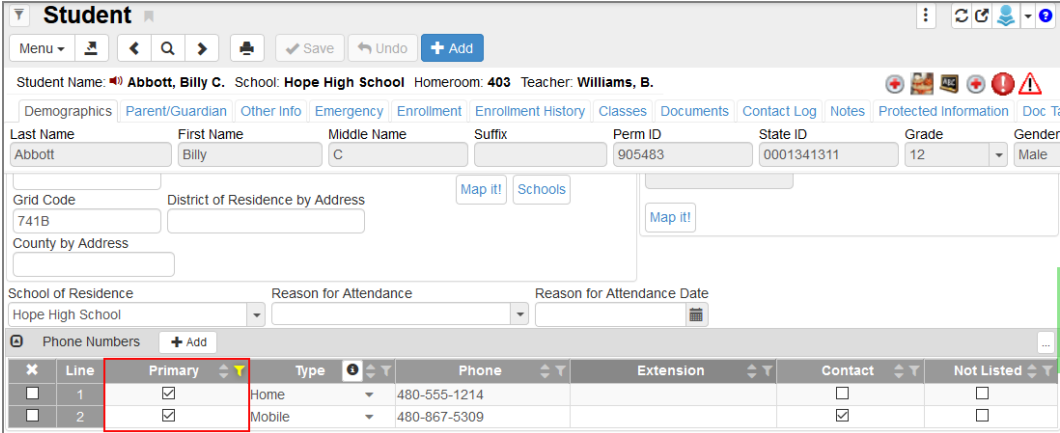
Line	Primary	Type	Phone	Extension	Contact	Not Listed
	<input type="checkbox"/> Select All	Home	480-555-1214		<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> N	Mobile	480-867-5309		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Y	Mobile	480-853-5967		<input checked="" type="checkbox"/>	<input type="checkbox"/>

RulesEnd: Yes

Clear Apply Cancel

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.

The screenshot shows a 'Phone Numbers' filter dialog box. It has a 'Line' column with a checkbox and a 'Primary' column with a 'Select All' checkbox and a 'Y' checkbox. The 'Clear' button is highlighted with a red box.

Line	Primary
<input type="checkbox"/>	<input checked="" type="checkbox"/> Select All
	<input checked="" type="checkbox"/> Y

Student Screen

Enrollment History Filter Example

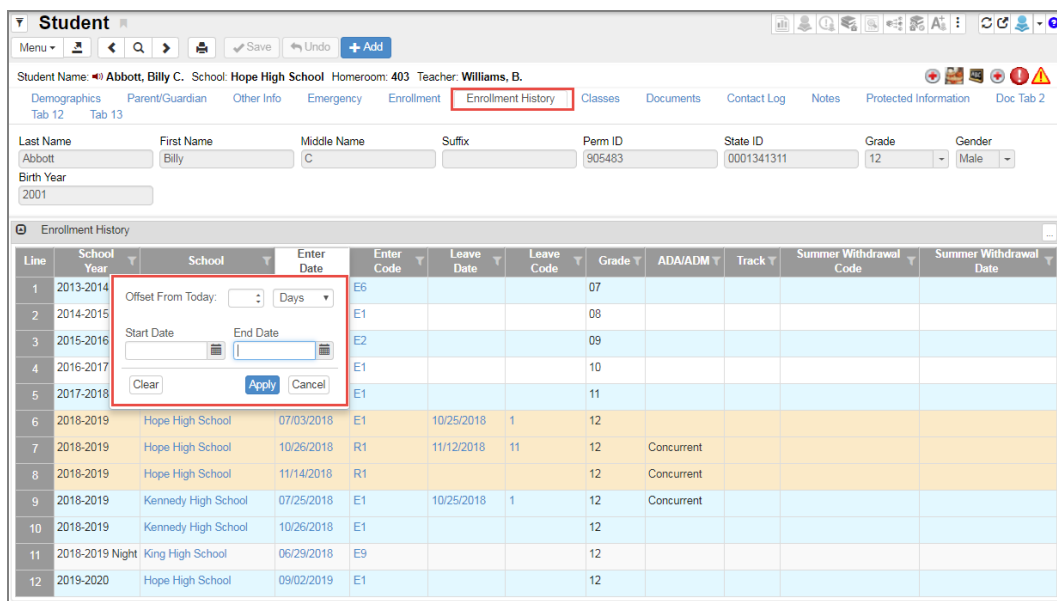
1. Select the **Enrollment History** tab on the Student screen.
2. Click  on the **Enter Date** column in the Enrollment History section.

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.




The screenshot shows the 'Student' screen for Billy C. Abbott. The 'Enrollment History' tab is active. A dropdown menu is open for the 'Enter Date' column, showing 'Offset From Today' options and date pickers for 'Start Date' and 'End Date'.

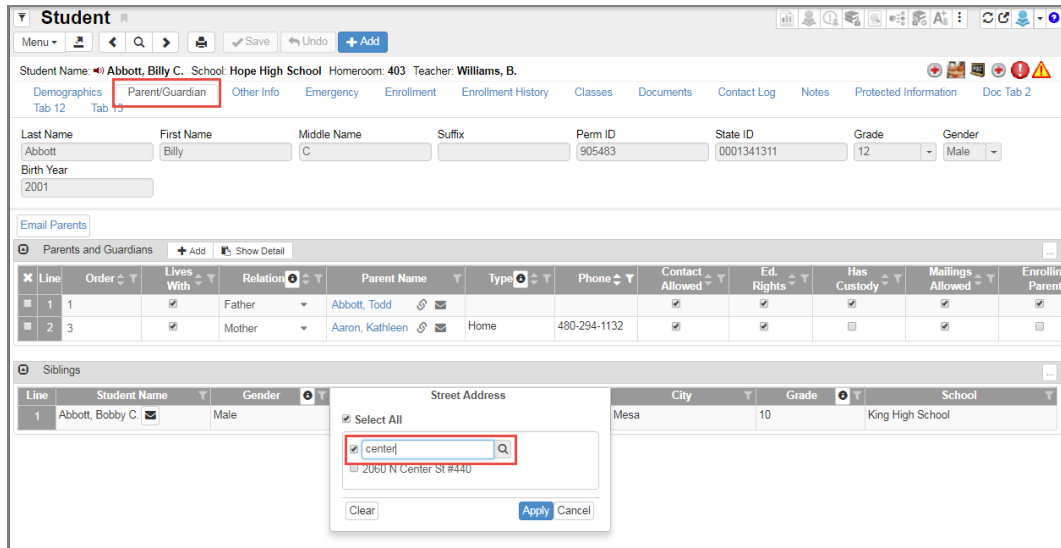
Line	School Year	School	Enter Date	Enter Code	Leave Date	Leave Code	Grade	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2013-2014			E6			07				
2	2014-2015			E1			08				
3	2015-2016			E2			09				
4	2016-2017			E1			10				
5	2017-2018			E1			11				
6	2018-2019	Hope High School	07/03/2018	E1	10/25/2018	1	12				
7	2018-2019	Hope High School	10/26/2018	R1	11/12/2018	11	12	Concurrent			
8	2018-2019	Hope High School	11/14/2018	R1			12	Concurrent			
9	2018-2019	Kennedy High School	07/25/2018	E1	10/25/2018	1	12	Concurrent			
10	2018-2019	Kennedy High School	10/26/2018	E1			12				
11	2018-2019 Night	King High School	06/29/2018	E9			12				
12	2019-2020	Hope High School	09/02/2019	E1			12				

Student Screen, Enrollment History Tab

3. Click **Apply**.

Filtering by Keyword Example

1. Select the **Parent/Guardian** tab on the Student screen.
2. Click  on the **Street Address** column in the Siblings section.
3. Enter the keyword to locate.




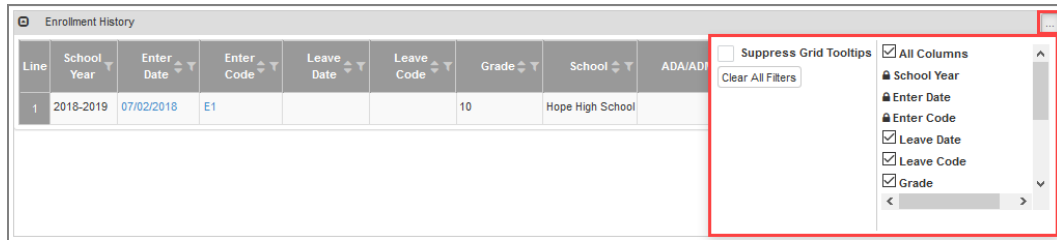
Student Screen, Parent/Guardian Tab

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.



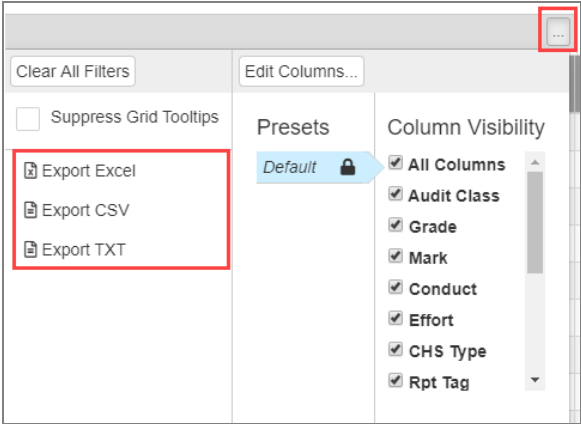
Certain grids, such as those on **Synergy SIS > Attendance > Period Attendance** and **Synergy SIS > Attendance > Daily Attendance**, display tooltips when hovering over data. Select **Suppress Grid Tooltips** to disable this feature.

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.

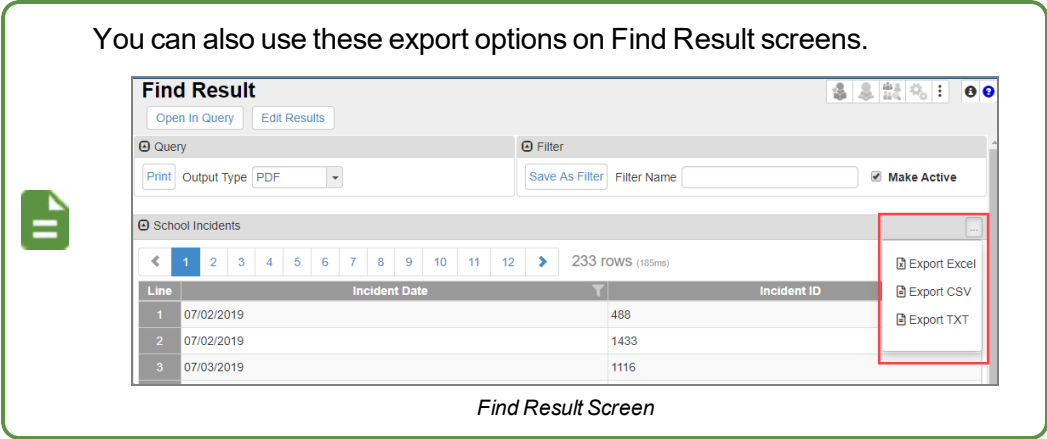
Export Options

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.



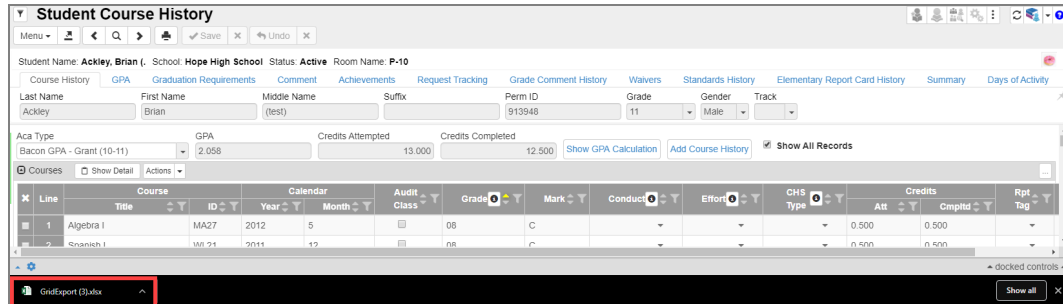
Find Result Screen

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

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
1	Last Name	First Name	Middle Name	Perm ID	Ed-Fi ID	State ID	Title	ID	Year	Month	Audit Class	Grade	Mark	Conduct	Effort	CHS Type	Att	Cmplt	Rpt Tag	Modified Curr.
2	Ackley	Brian	(test)	913948		0001346307	Algebra I	MA27	2011	12	No	08	C			0.500	0.500			
3	Ackley	Brian	(test)	913948		0001346307	Spanish I	WL21	2011	12	No	08	C			0.500	0.500			
4	Ackley	Brian	(test)	913948		0001346307	Algebra I	MA27	2012	5	No	08	C			0.500	0.500			
5	Ackley	Brian	(test)	913948		0001346307	Spanish I	WL21	2012	5	No	08	C			0.500	0.500			
6	Ackley	Brian	(test)	913948		0001346307	Adv Drama	EL29	2012	12	No	09	A			0.500	0.500			
7	Ackley	Brian	(test)	913948		0001346307	English 9	EN09	2012	12	No	09	B			0.500	0.500			
8	Ackley	Brian	(test)	913948		0001346307	Geometry	MA30	2012	12	No	09	C			0.000	0.000			
9	Ackley	Brian	(test)	913948		0001346307	Science 9	SC09	2012	12	No	09	C			0.500	0.500			
10	Ackley	Brian	(test)	913948		0001346307	Spanish II	WL22	2012	12	No	09	C			0.500	0.500			

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

```
Last Name,First Name,Middle Name,Perm ID,Ed-Fi ID,State ID,Title,ID,Year,Month,Audit Class,Grade,Mark,Conduct,Effort,CHS Type,Att,Cmplt,Rpt Tag,Modified Curr.
Ackley,Brian,(test),913948,,0001346307,Algebra I,MA27,2011,12,No,08,C,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,Spanish I,WL21,2011,12,No,08,C,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,Algebra I,MA27,2012,5,No,08,C,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,Spanish I,WL21,2012,5,No,08,C,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,Adv Drama,EL29,2012,12,No,09,A,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,English 9,EN09,2012,12,No,09,B,,,0.500,0.500,,No
Ackley,Brian,(test),913948,,0001346307,Geometry,MA30,2012,12,No,09,C,,,0.000,0.000,,No
Ackley,Brian,(test),913948,,0001346307,Science 9,SC09,2012,12,No,09,C,,,0.500,0.500,,No
```

CSV Export File Output

- **Export TXT** – A text file opens


```
Last Name First Name Middle Name Perm ID Ed-Fi ID State ID Title ID Year Month Audit Class Grade Mark Conduct Effort CHS Type Att Cmplt Rpt Tag Modified Curr.
Ackley Brian (test) 913948 0001346307 Algebra I MA27 2011 12 No 08 C 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Spanish I WL21 2011 12 No 08 C 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Algebra I MA27 2012 5 No 08 C 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Spanish I WL21 2012 5 No 08 C 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Adv Drama EL29 2012 12 No 09 A 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 English 9 EN09 2012 12 No 09 B 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Geometry MA30 2012 12 No 09 C 0.000 0.000 No
Ackley Brian (test) 913948 0001346307 Science 9 SC09 2012 12 No 09 C 0.500 0.500 No
Ackley Brian (test) 913948 0001346307 Spanish II WL22 2012 12 No 09 C 0.500 0.500 No
```

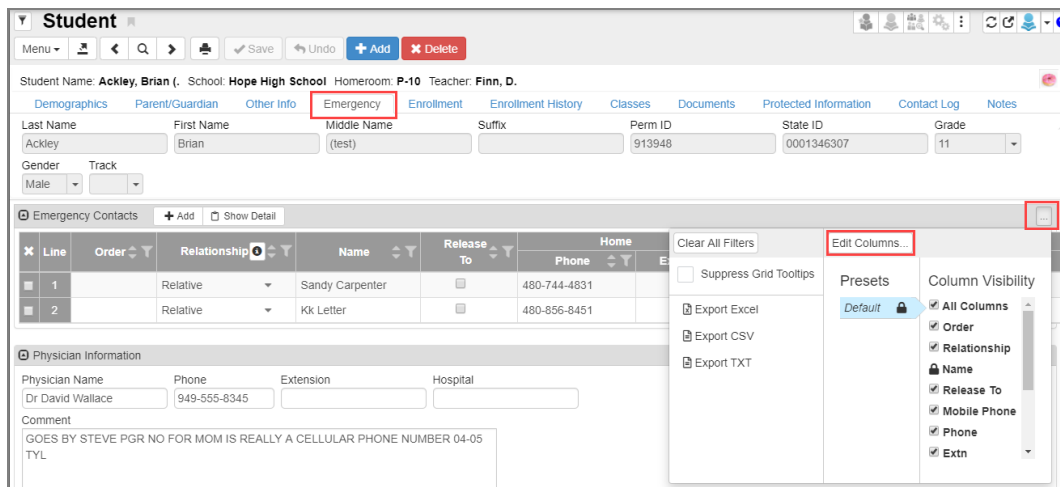
TXT Export File Output

Hiding and Reordering Columns


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

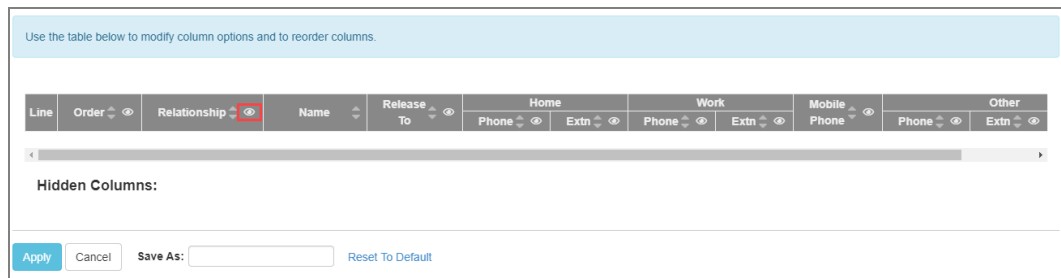
Hiding Columns

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.

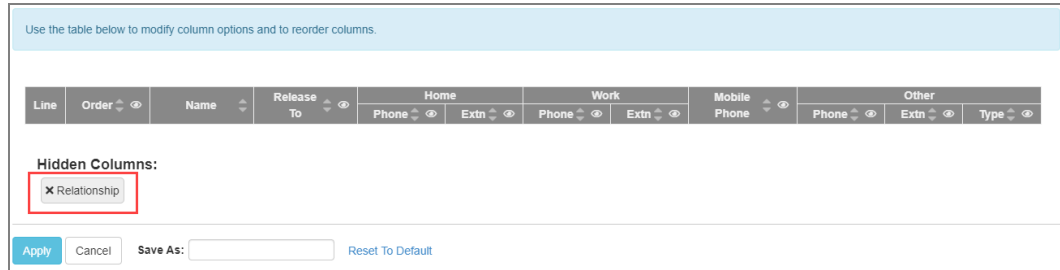


Student Screen, Emergency Tab

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.'

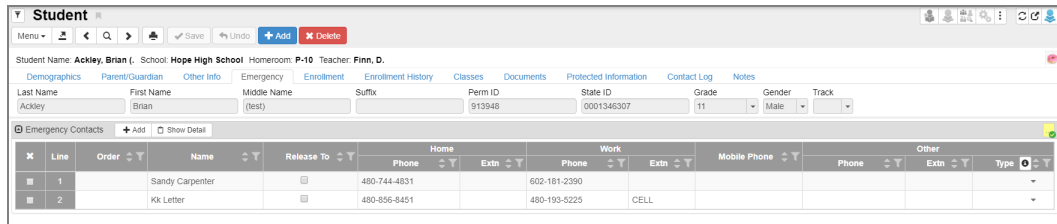


Edit Columns Window



Edit Columns Window (Relationship Column Hidden)

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

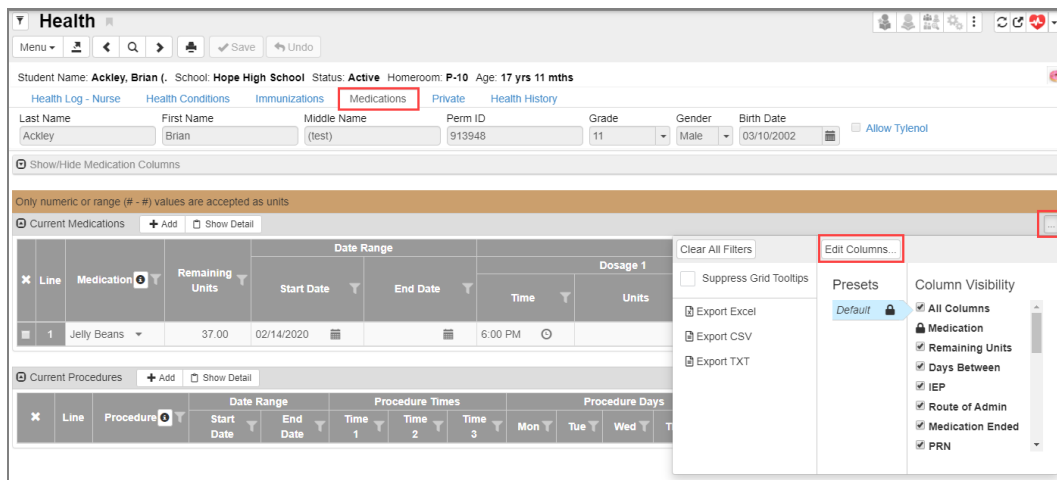


Student Screen, Emergency Tab (Relationship Column Hidden)

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.

Use the table below to modify column options and to reorder columns.

Line	Medication	Remaining Units	Date Range		Dosage Times									Mon	Tue
			Start Date	End Date	Dosage 1			Dosage 2			Dosage 3				
					Time	Units	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)		
Hidden Columns:															

Apply Cancel Save As: Reset To Default

Edit Columns Window (Default)

Use the table below to modify column options and to reorder columns.

Line	Date Range		Remaining Units	Medication	Dosage Times									Mon	Tue
	Start Date	End Date			Dosage 1			Dosage 3			Dosage 2				
					Units	Time	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)		
Hidden Columns:															

Apply Cancel Save As: Reset To Default

Edit Columns Window (Modified)

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

Health

Student Name: Ackley, Brian (School: Hope High School Status: Active Homeroom: P-10 Age: 17 yrs 11 mths

Last Name: Ackley First Name: Brian Middle Name: (best) Perm ID: 913948 Grade: 11 Gender: Male Birth Date: 03/10/2002 Allow Tylenol

Only numeric or range (e.g. #) values are accepted as units

Line	Medication	Date Range		Remaining Units	Medication	Dosage Times									Mon	Tue
		Start Date	End Date			Dosage 1			Dosage 3			Dosage 2				
						Units	Time	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)		
1	Jelly Beans	02/14/2020		37.00		1	6:00 PM									

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.



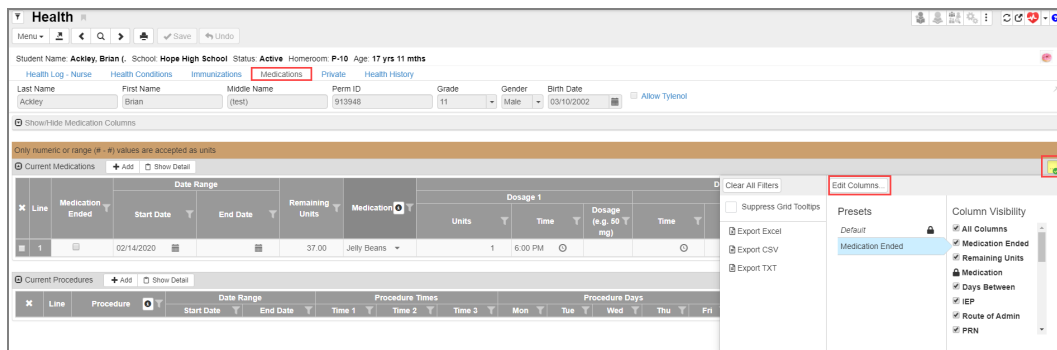
Presets are specific to the user and the grid they are created in.

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



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

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



The screenshot shows the 'Health' screen for a student named Ackley, Brian. The 'Medications' tab is active. The 'Edit Columns...' button is highlighted with a red box. The 'Column Visibility' panel is open, showing a list of columns with checkboxes for visibility. The 'Medication Ended' column is highlighted in blue.

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**.

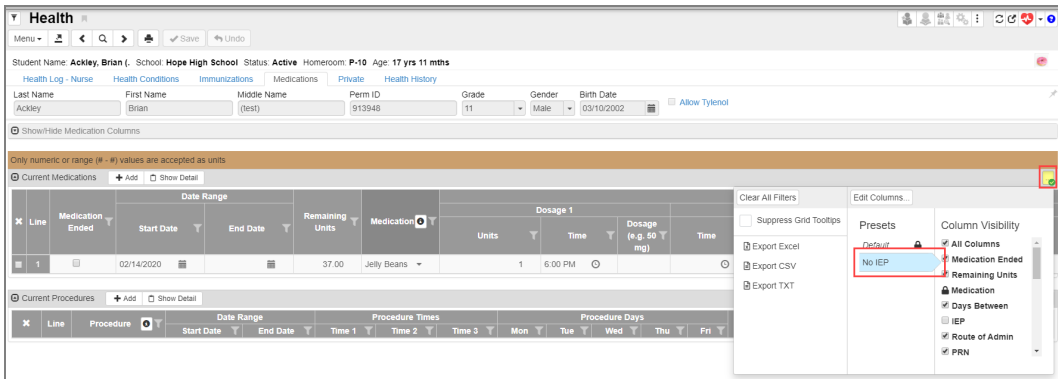
Use the table below to modify column options and to reorder columns.

Line	Medication Ended	Date Range		Remaining Units	Medication	Dosage Times					
		Start Date	End Date			Dosage 1		Dosage 3		Dosage 2	
						Units	Time	Dosage (e.g. 50 mg)	Time	Units	Dosage (e.g. 50 mg)
Hidden Columns:											
<input checked="" type="checkbox"/> IEP											
Save 		Cancel		Preset Name: No IEP		Reset To Default					

Edit Columns Window

7. Click **Save**.

8. Click . The Preset Name displays in the Presets column.




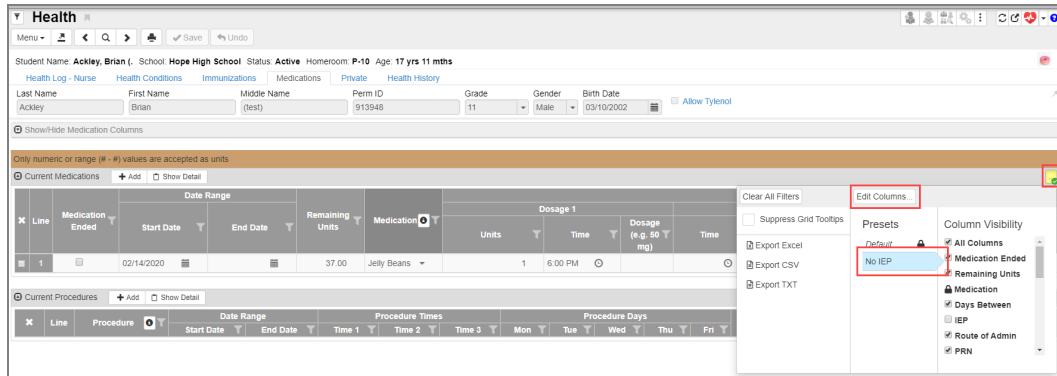
The screenshot shows the 'Health Screen, Medications Tab' for a student named Brian Ackley. The 'Edit Columns' window is open, showing a table of columns and a 'Presets' list. The 'Preset Name' field is highlighted with a red box, and the 'No IEP' preset is selected in the 'Presets' list.

Health Screen, Medications Tab

Modifying Presets

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

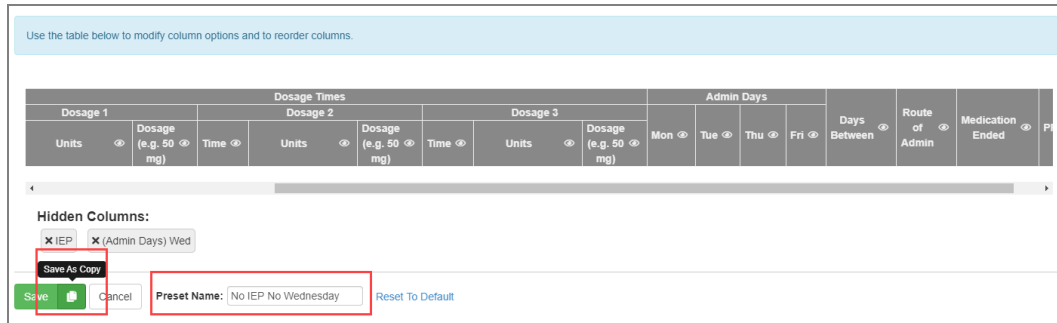
1. Hover over .
2. Select the preset you want to modify.
3. Click **Edit Columns...** to open the Edit Columns window.



The screenshot shows the 'Health' screen for a patient named Brian L. Ackley. The 'Medications' tab is active, displaying a table with columns for Line, Medication, Date Range, Remaining Units, and Dosage. A red box highlights the 'Edit Columns...' button in the top right corner of the medication table.

Health Screen, Medications Tab

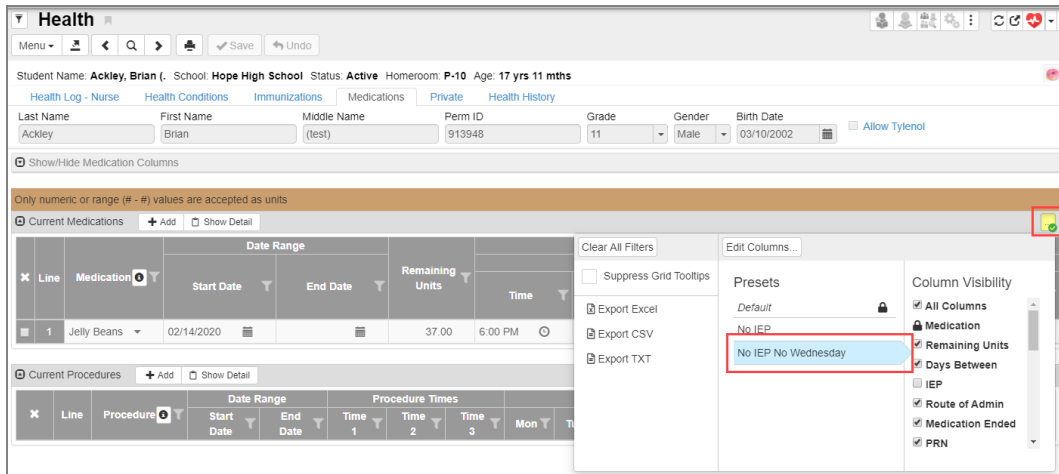
4. Reorder, hide, or unhide columns as needed.
5. Enter a new **Preset Name**.
6. Click **Save As Copy**.



The screenshot shows the 'Edit Columns' window. It features a table with columns for Dosage Times (Units, Dosage, Time) and Admin Days (Mon, Tue, Thu, Fri). Below the table is a 'Hidden Columns' section with 'No IEP' and '(Admin Days) Wed' listed. A red box highlights the 'Save As Copy' button, and another red box highlights the 'Preset Name' field containing 'No IEP No Wednesday'.

Edit Columns Window

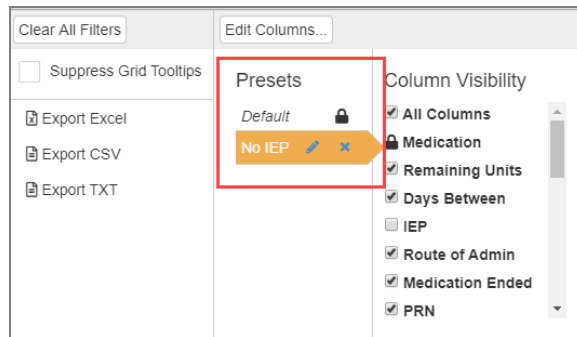
7. Click . The new Preset Name displays in the Presets column.



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.

The screenshot shows the 'Student' screen with the 'Emergency' tab selected. The 'Emergency Contacts' table is visible, and the 'Physician Information' section contains a 'Comment' field, which is highlighted with a red box. The 'Comment' field is currently empty and has a yellow background.

Line	Order	Relationship	Name	Release To	Home		Work	
					Phone	Extn	Phone	Extn
				<input type="checkbox"/>				

Physician Information


Physician Name: Phone: Extension: Hospital:

Comment:

Has Insurance: Insurance Company: Insurance Phone:

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.

The screenshot shows the 'Comment' field with the action bar visible in the top right corner. The action bar contains three icons: a maximize icon, a close icon, and a refresh icon. The 'Comment' field is currently empty and has a yellow background.

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

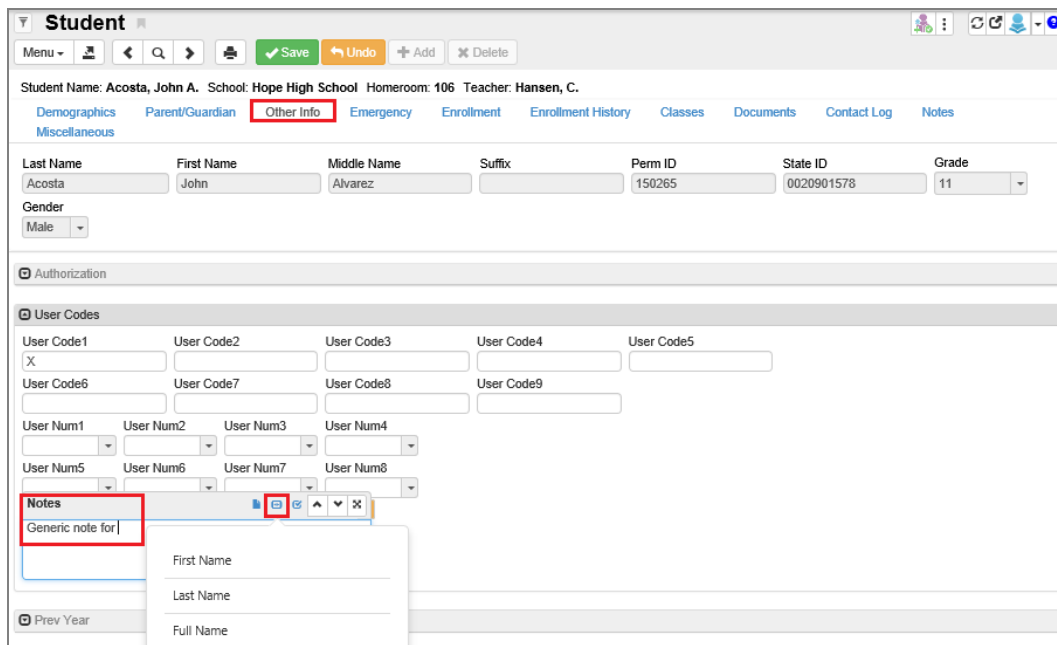
The following example shows how to create a template in a **Notes** field.

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.

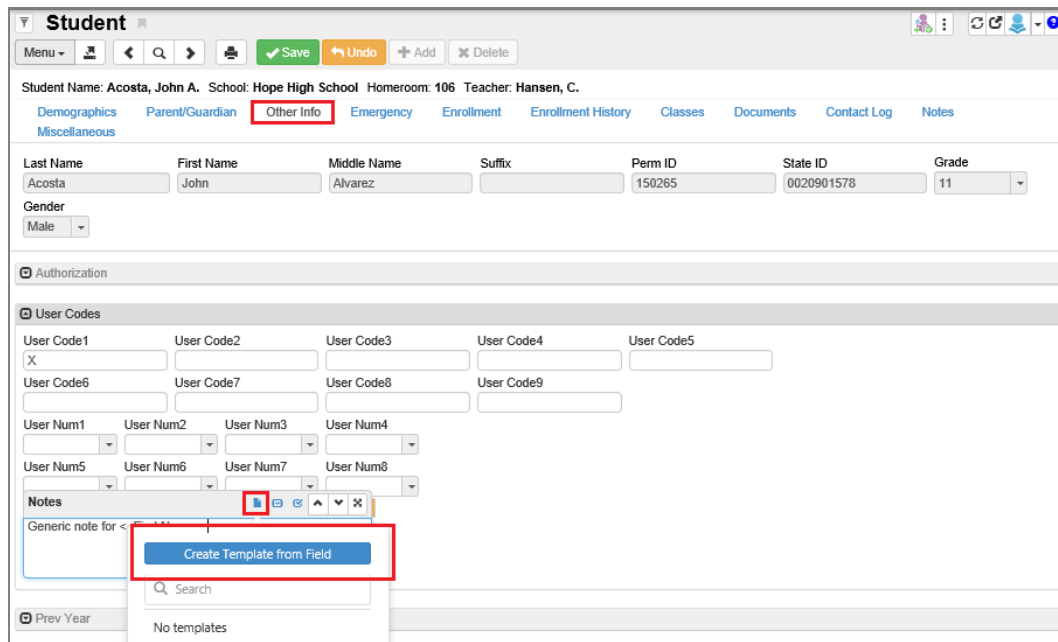


The screenshot shows the 'Student' screen in Synergy SIS, specifically the 'Other Info' tab. The 'Notes' field is highlighted with a red box, and a token selection menu is open below it, showing options for 'First Name', 'Last Name', and 'Full Name'. The 'Other Info' tab is also highlighted with a red box. The 'Notes' field contains the text 'Generic note for |'.

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.



The screenshot shows the 'Student' screen for John A. Acosta at Hope High School. The 'Other Info' tab is selected. In the 'Notes' section, a red box highlights the 'Create Template from Field' button. The 'Notes' section also shows a search bar and a 'Prev Year' button.

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.

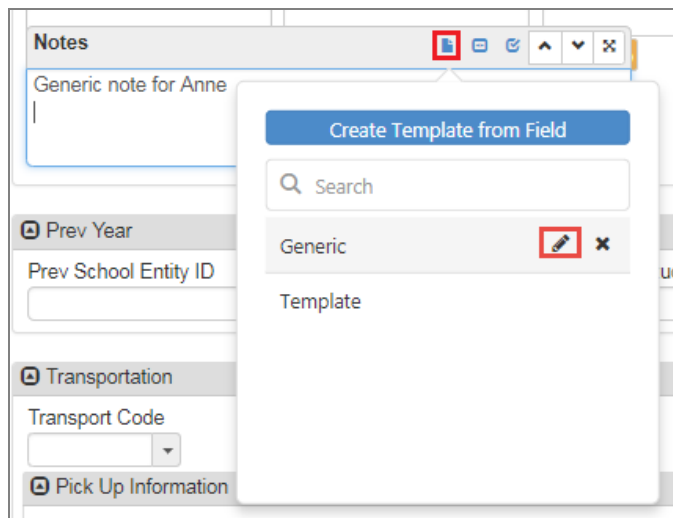
12. Enter the template text.

Create Template Window


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

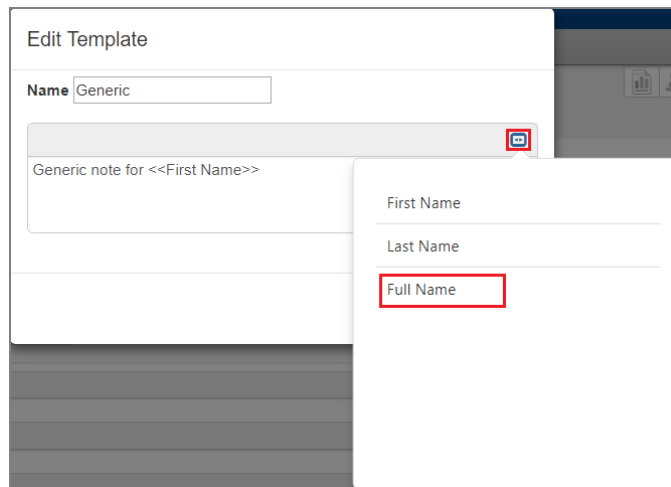
Edit a Memo Template

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


- Click  to modify the token used in the template if needed.



Edit Template Window

- Click **Save**.

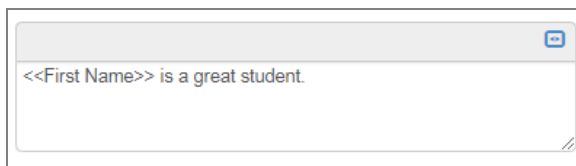
Insert a Template in a Memo Field

- Click  on **Notes** to open the template menu.
- Select a template from the list.

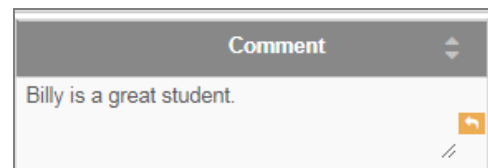


The template text displays in the field. The student's name also displays if you used tokens.

You can insert more than one template into a **Note** field.





Edit Template Window

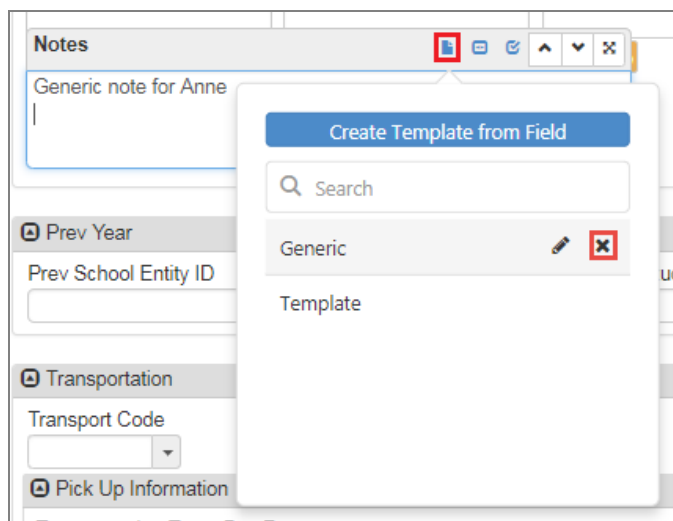


Student Screen, Contact Log Tab

- 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.

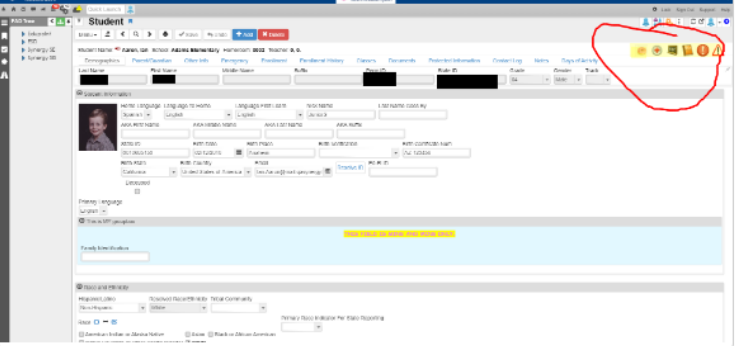
Synergy Feedback ✕

NOTE: Feedback does not replace your district's error reporting process. Please continue to follow your district's process for problem reporting to resolve encountered issues.

Tell us about your Synergy experience: ?

Will you include these icons for everyone?

 Crop
 Blackout
 Highlight
 Outline
 Draw
reset




When uploading screenshots, please ensure any sensitive information has been redacted by selecting the *Blackout* button and drawing a rectangle over the area.

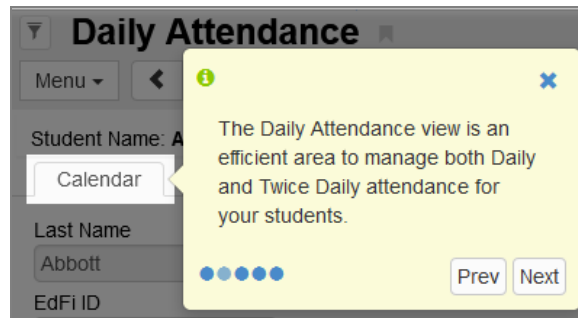
Include Screenshot

SynergyFeedback Window

5. Click **Send Feedback**.

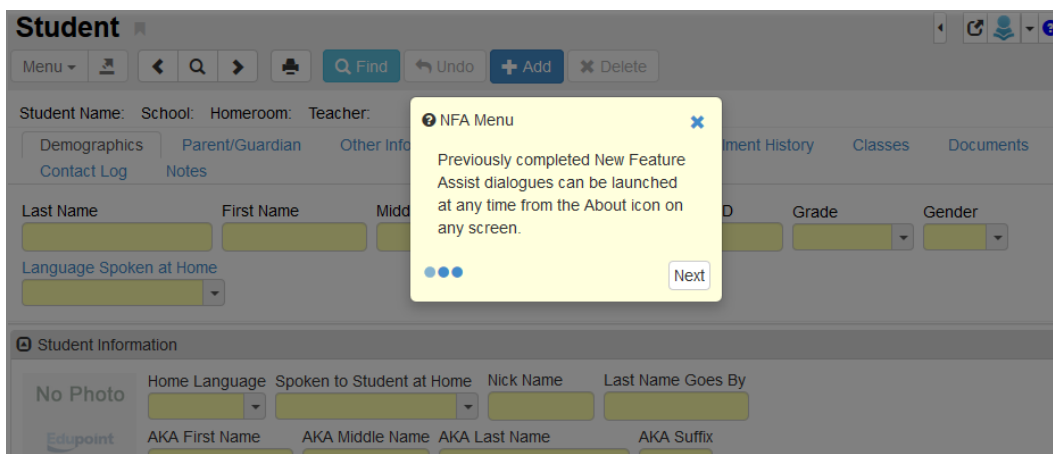
Using New Feature Assist

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



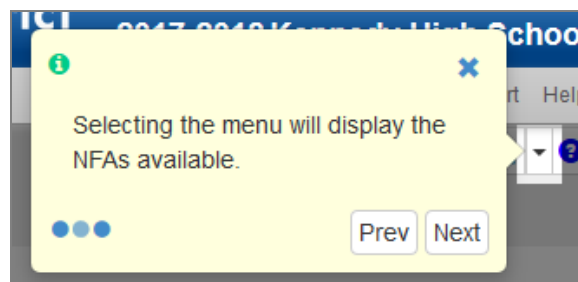
New Feature Assist Example

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.



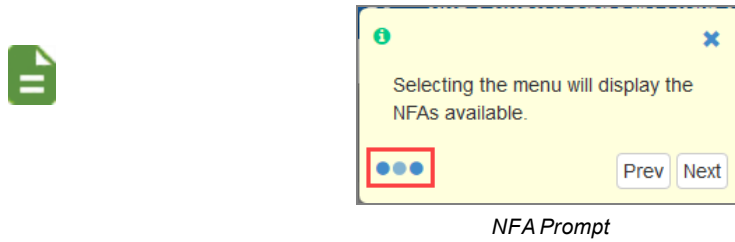
Student Screen

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.

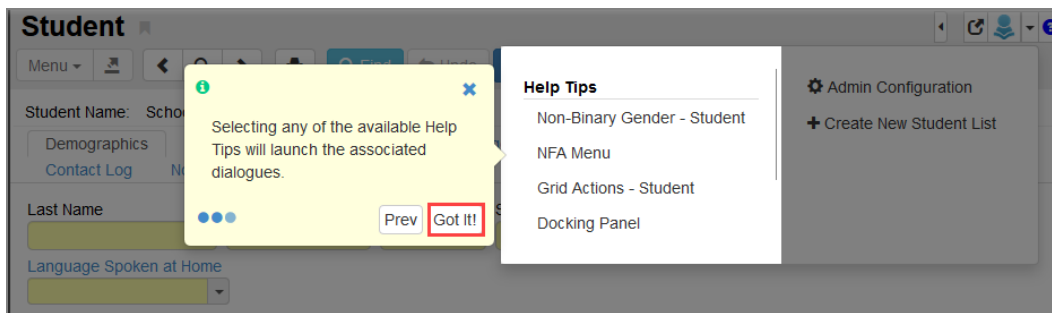


Student Screen

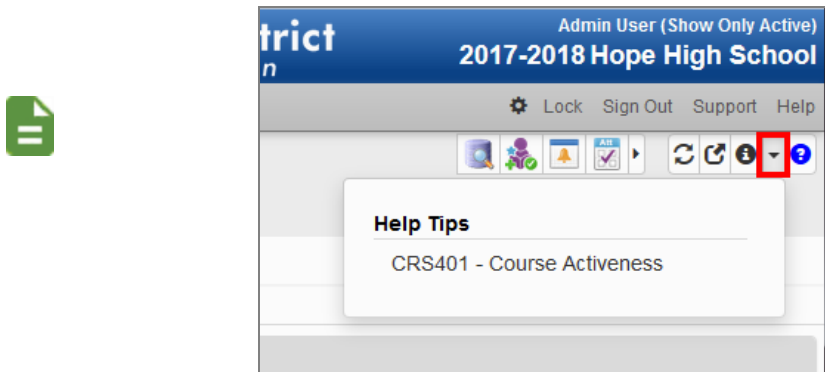
You can also navigate directly to a prompt by clicking on the dots at the bottom.



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.



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.

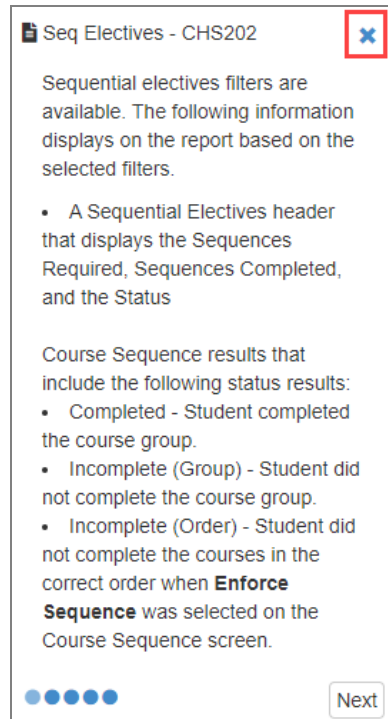


Using Snooze and Don't Remind Me Again

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

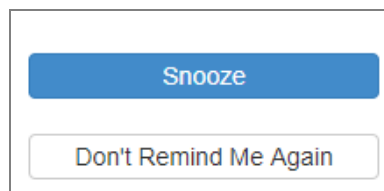
This is an example of how to Snooze and Dismiss the NFA on the CHS202 – Student Graduation Requirement Profile screen.

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

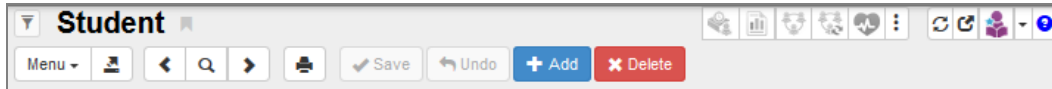
- **Snooze** – The NFA no longer displays when navigating to that screen until you log out of Synergy. The NFA displays again if you log back in to Synergy and navigate to that screen.
- **Don't Remind Me Again** – The NFA no longer displays when navigating to that screen.



Snooze/Don't Remind Me Again Window

Action Bar

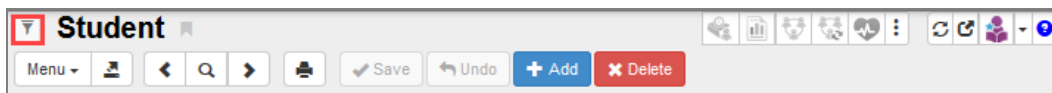
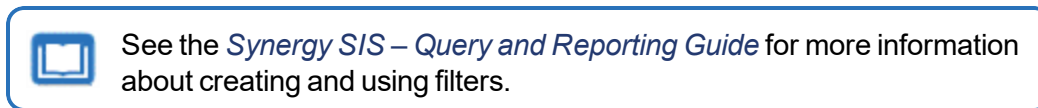
The Action Bar contains icons, buttons, and indicators for various functions specific to the currently displayed screen.



Synergy Action Bar

Filter

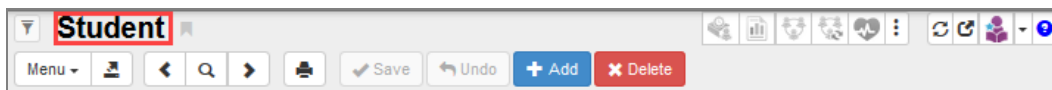
The **Filter** icon is a funnel to the left of the title of the screen. The filter uses a custom query to filter the records displayed on the screen.



Synergy Action Bar

Screen Name

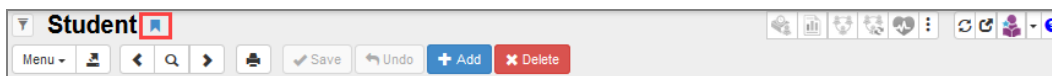
The Screen Name always displays in the title area of each screen. You can enter the Screen Name in the Quick Launch bar to navigate quickly to a particular screen.



Synergy Action Bar

Bookmark

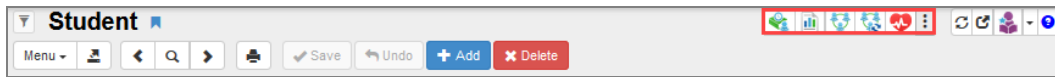
Click the **Bookmark** icon to the right of the screen title to flag any frequently used screen, report, or process for quick access later.



Synergy Action Bar

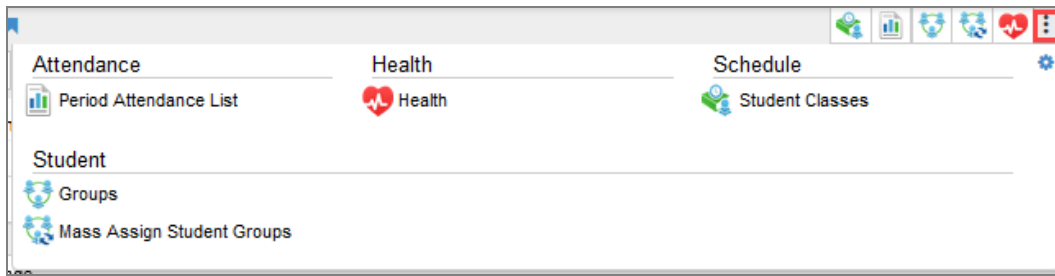
Quick Nav

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



Synergy Action Bar

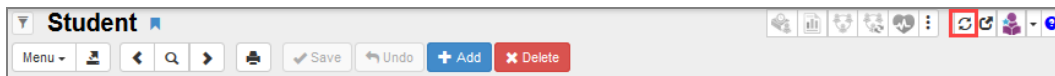
Additional Quick Nav options display when  is clicked.



Synergy Action Bar

Refresh View

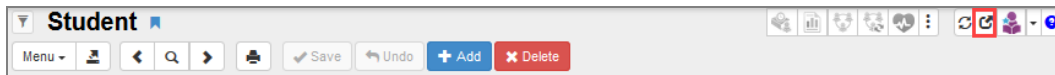
This refreshes the data on the current screen.



Synergy Action Bar

Detach View

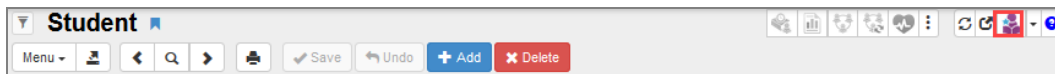
This opens the screen in a separate browser window. In a detached screen, all of the normal functions on the screen still work, such as entering information in fields. An unlimited number of detached screens can be opened.



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.

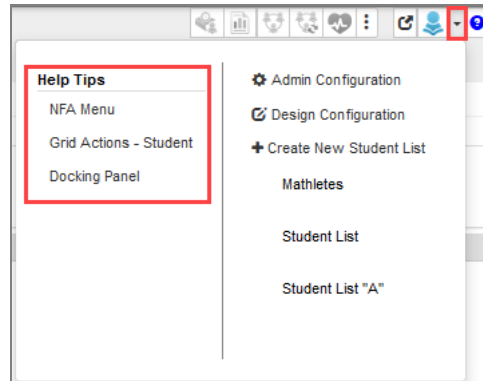


Synergy Action Bar

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.

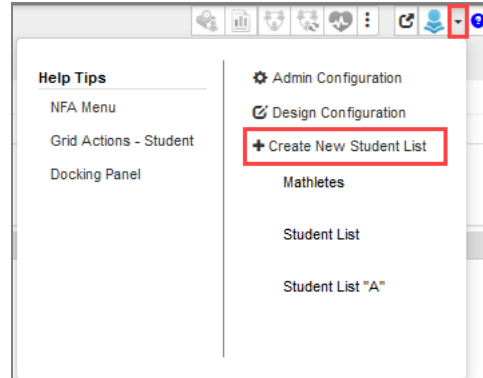


Screen Utilities

Create New Student List

You can create a customized new student list.

1. Select *Create New Student List*.



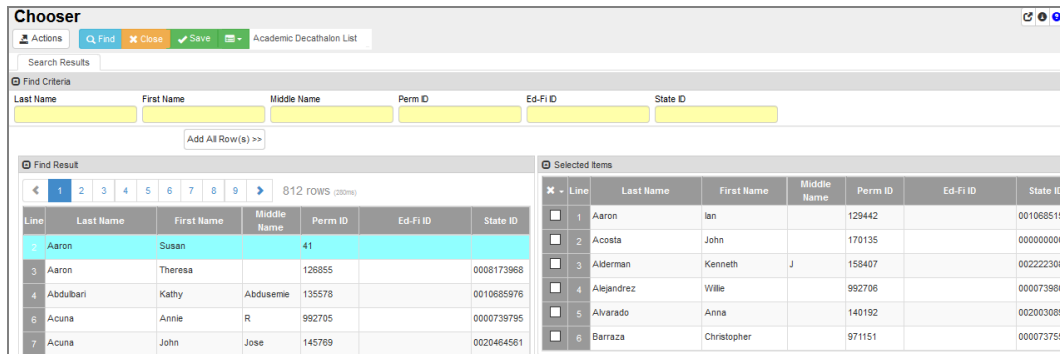
Screen Utilities

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**.

Line	Last Name	First Name	Middle Name	Perm ID	Ed-Fi ID	State ID
	Abb	Bill		123456		

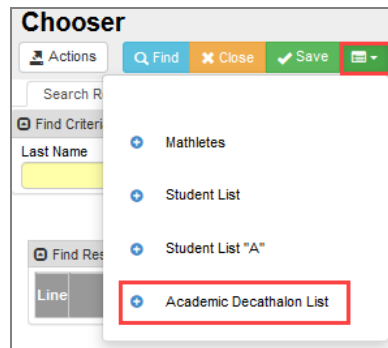
Chooser Screen

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



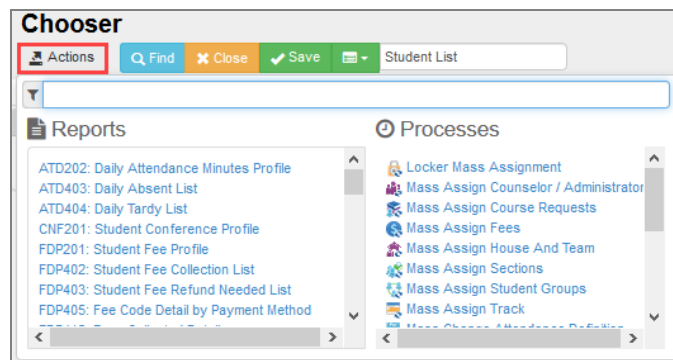
Chooser Screen

- Click **Save**.
- Click the list icon to access your student lists. Select your list from the student lists that display.



Chooser Screen

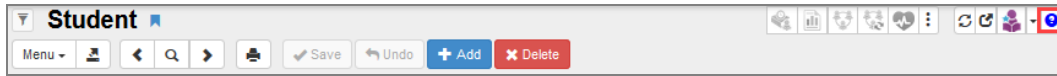
- Click **Actions** to run Reports or Processes for this student list.



Chooser Screen

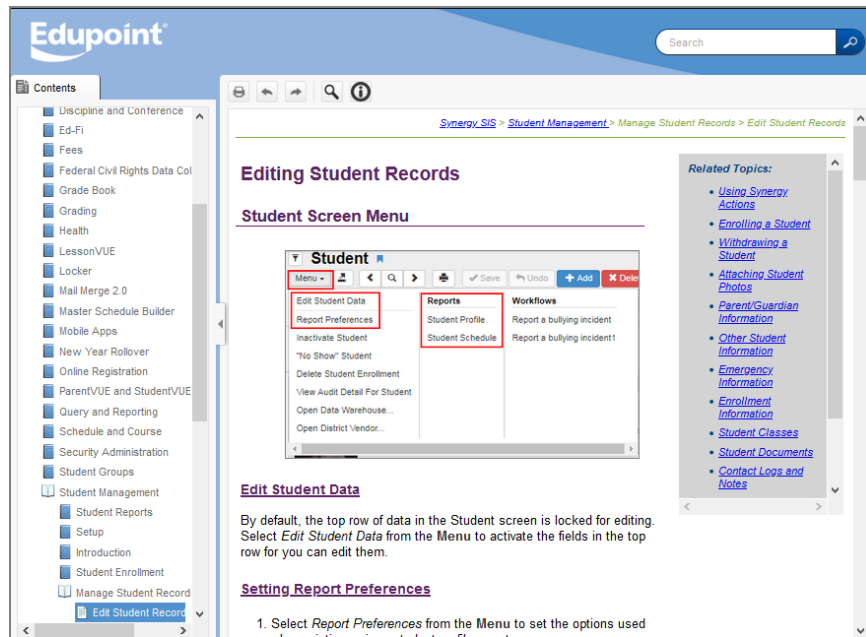
Context Sensitive Help

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



Synergy Action Bar

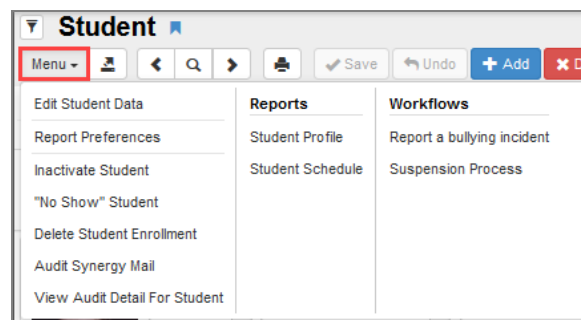
This is an example of the context sensitive help that displays when the icon is clicked.



Context Sensitive Help Window

Menu

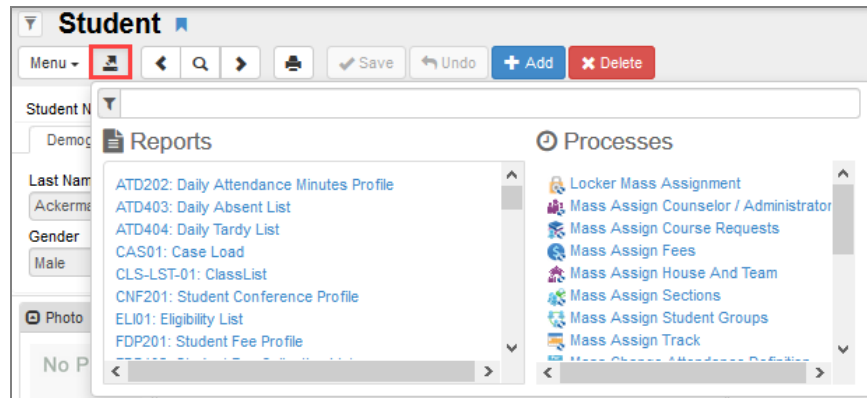
The **Menu** contains a selection of actions for the screen, Reports, and Workflows depending on the user's permissions.



Synergy Action Bar

Actions

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

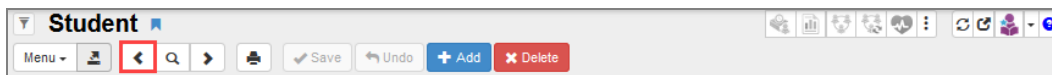


Synergy Action Bar

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

Previous

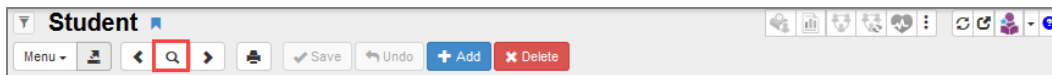
This scrolls to the previous record on the screen. Records sort in alphabetical order by the first field on the screen, so **Previous** scrolls through the records in descending order by this field.



Synergy Action Bar

Find

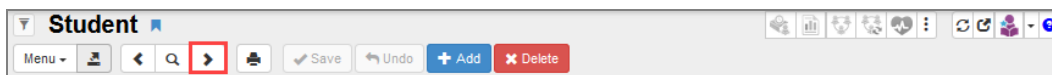
The **Find** icon switches the screen to find records instead of screening or editing the records. The fields in the screen become yellow in Find mode.



Synergy Action Bar

Next

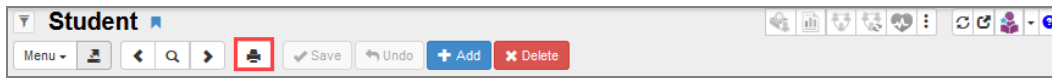
Next scrolls to the next record on the screen. Records are sorted in alphabetical order by the first field on the screen, so **Next** scrolls through the records in ascending order by this field.



Synergy Action Bar

Print

This prints the current screen as displayed.

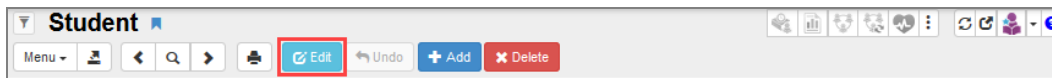


Synergy Action Bar

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.



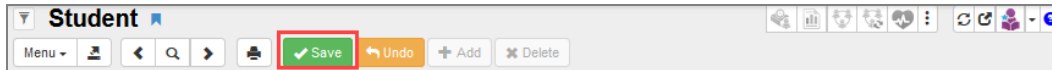
Synergy Action Bar (Inquiry Mode)

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)

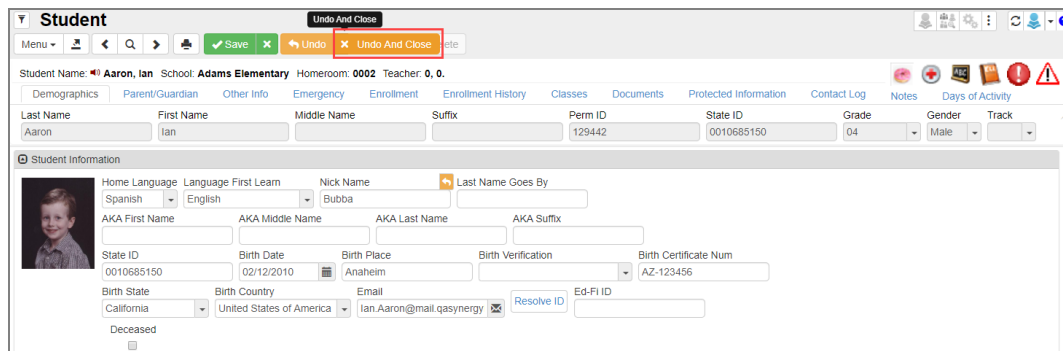
The **Save And Close** and **Undo And Close** options display if you use the detached view in Synergy SIS. This example uses the Student screen in the detached view.

- 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.

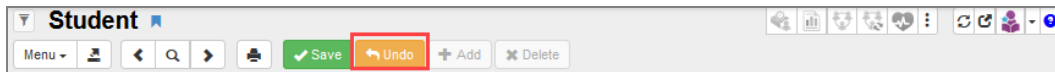
- Using **Undo And Close**
 - a. Edit the information on the Student screen.
 - b. Hover over  on the **Undo** button to display the **Undo And Close** option.
 - c. Click **Undo And Close**. The detached view closes and the information is not updated on the main screen.



Student Screen (Detach View)

Undo

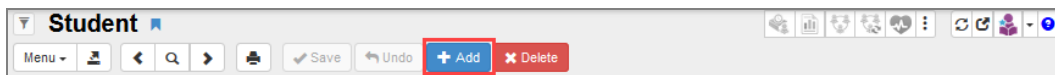
Undo reverses any changes made to the data on the screen.



Synergy Action Bar

Add


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

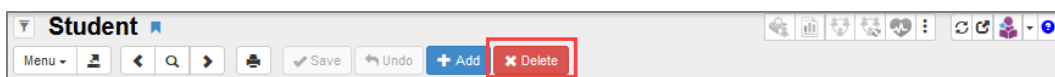


Synergy Action Bar

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.

The screenshot shows the 'Student' management screen for Alan W. Adair. At the top right, a row of notification icons is highlighted with a red box. Below this, the student's demographic information is displayed, including name, school, and grade. The 'Student Information' section contains fields for home language, AKA names, birth date, and location. A 'Resolve ID' button is visible at the bottom right of the form.

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.



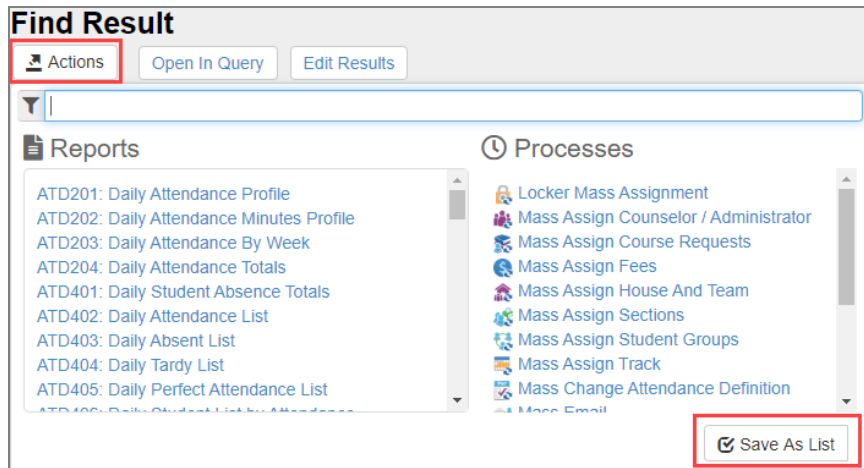
You can still create checklists in Screen Utilities, but they display in **Checklists** on the Navigation panel.

Creating a Checklist on the Find Result Screen

This example uses the Student screen.

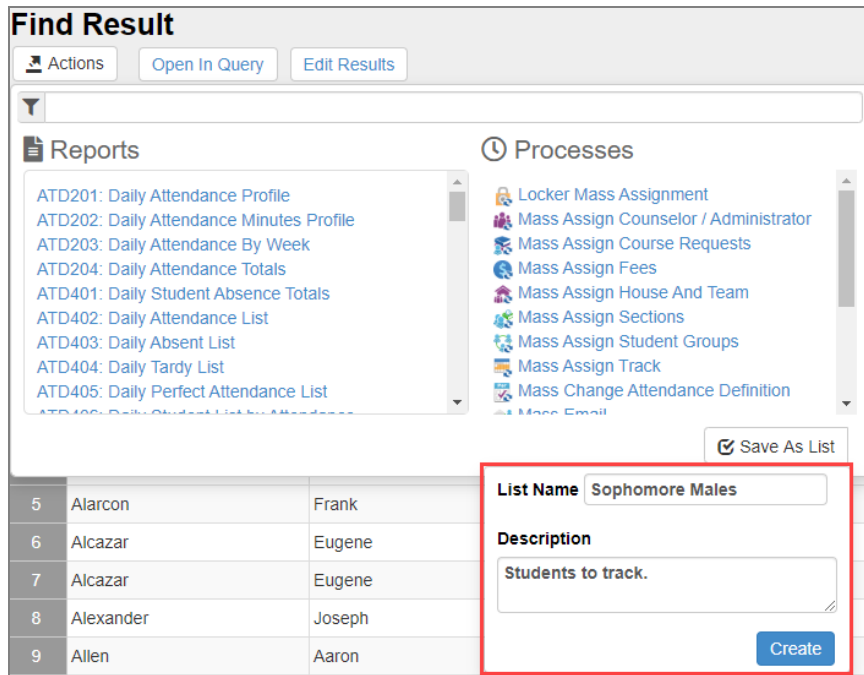
1. Navigate to **Synergy SIS > Student > Student**.
2. Enter the search criteria as needed.
3. Click **Find** to open the Find Result screen.
4. Click **Actions**.

5. Click **Save As List**.



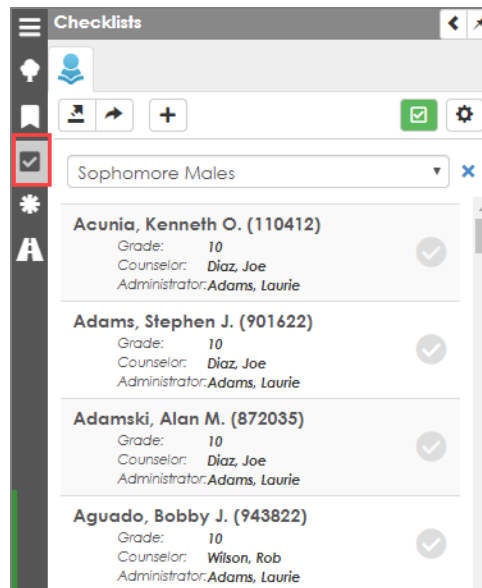
Find Result Screen

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



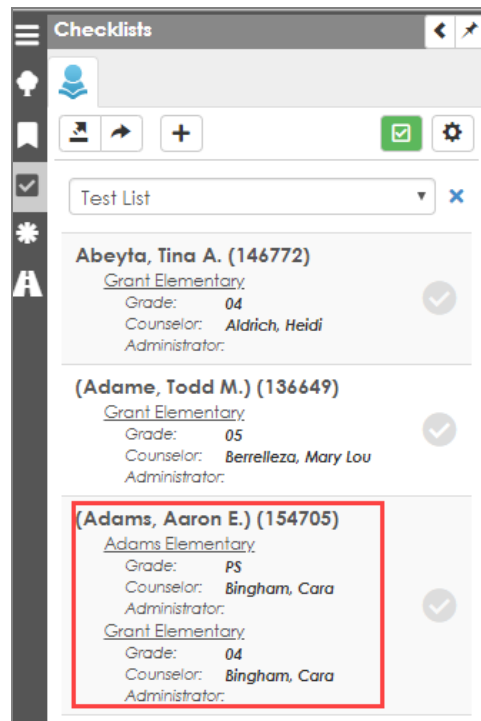
Find Result Screen

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.

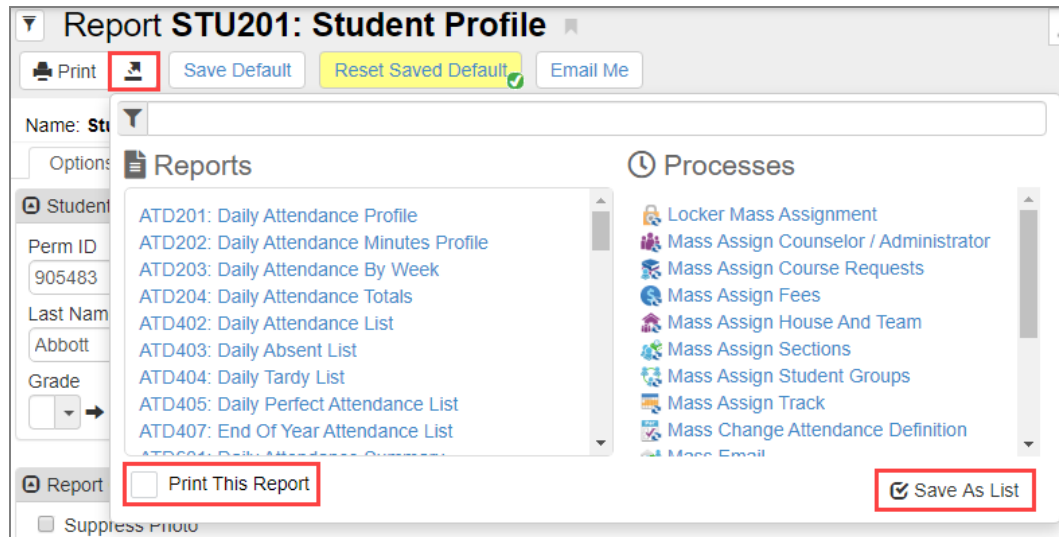


Checklists



Creating Checklist in Reports

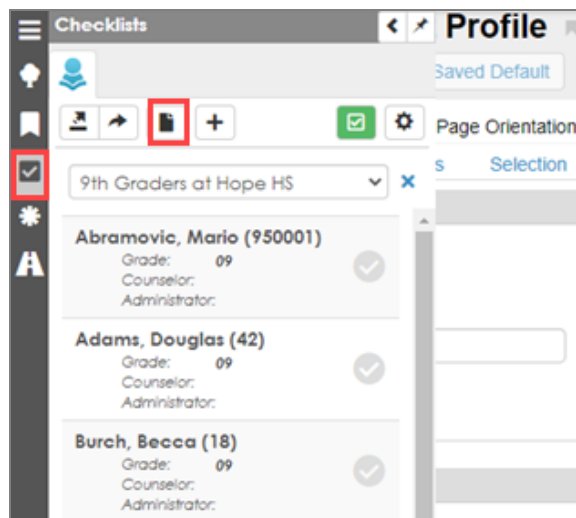
This example uses the STU201 – Student Profile screen.

1. Navigate to **Synergy SIS > Student > Reports > Individual > STU201 - Student Profile**.
2. Enter report options as needed.
3. Click .
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 [Creating a Checklist in the Find Result Screen](#).
7. Hover over  on the Navigation panel and click  to access the report from **Checklists**.



Checklists

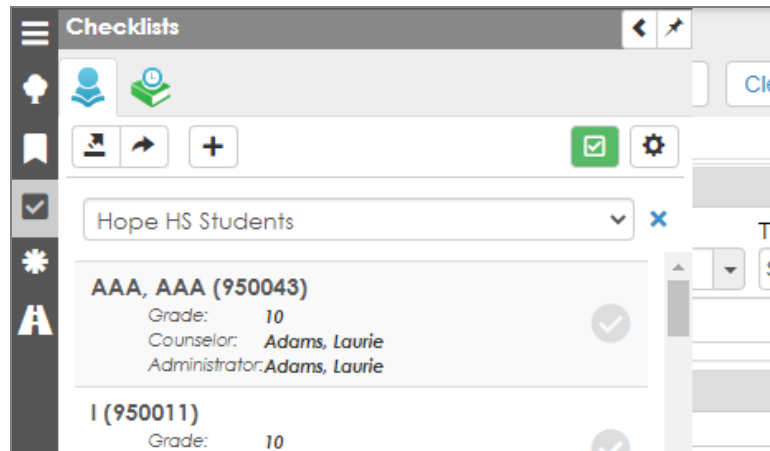
Creating a Checklist in Query

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






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

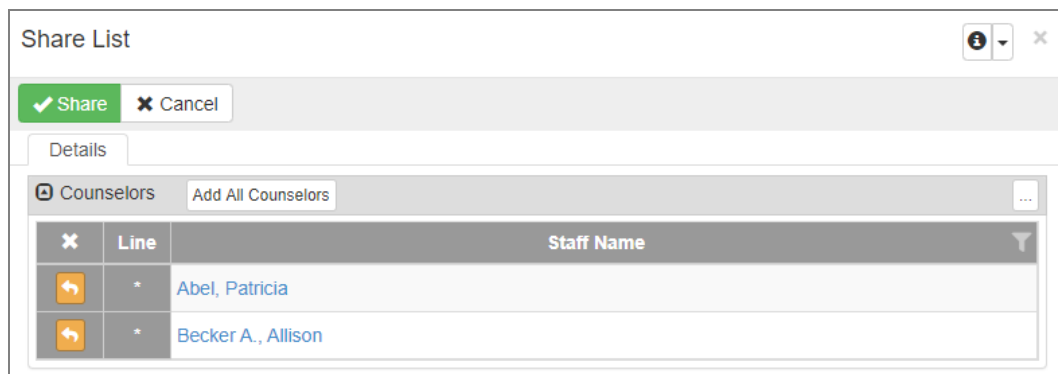
3. Click **Execute**.
4. Follow steps 4-9 as outlined above in [Creating a Checklist in the Find Result Window](#).









Checklists



Using Checklist Options

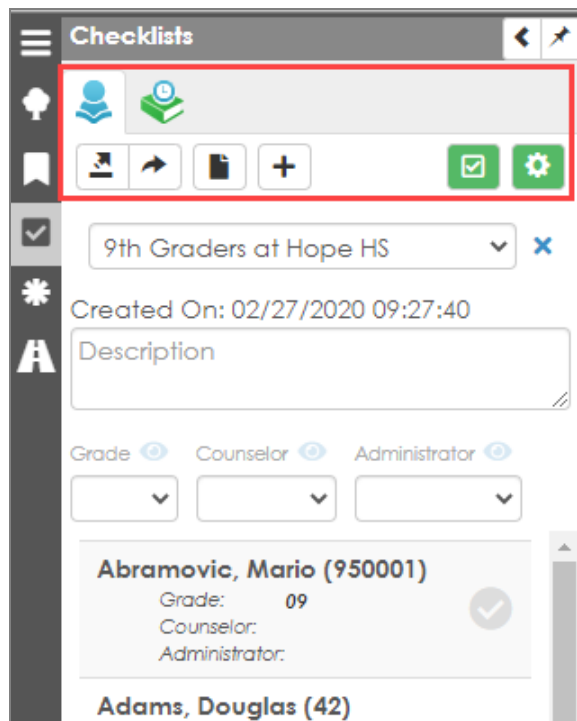
- Use  to toggle between Student and Section Checklists. These display when there is at least one checklist in the category.
- Click  to open the **Actions** menu to select Reports and Processes to generate.
- Click  to open the Share List window. You can select individual counselors, or select **Add 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				
Search <input type="text" value="number of days"/>				
Results				
Line	Setup Option Property	Where to find		
		View	Tab	Location
1	Number of Days in Schedule Cycle	School Attendance Options	Attendance Options	Period Attendance Options
2	The number of days into the future, the teacher can take attendance	District Setup	TeacherVUE	
3	Number of days to retain unprocessed health medical tasks	District Health Options	Options	Student Medications
4	Number of days before the end of the grading period to suppress grade book information (as teachers are completing data entry of their grade books)	ParentVUE and StudentVUE Configuration	PVUE Configuration	Grade Book Options
5	Number of days to look into the future for upcoming events to show on the students recent events home page	ParentVUE and StudentVUE Configuration	PVUE Configuration	Recent Event Configuration
6	Number of days to look into the past for events to show on the students recent events home page	ParentVUE and StudentVUE Configuration	PVUE Configuration	Recent Event Configuration
7	Number Of Days To Send Email Before Grade Period End	ParentVUE and StudentVUE Configuration	Email	Active Email Notifications
8	Number of Days in Cycle	Period Rotation Definition	Rotation Days	
9	Number of Days Before Process Restarts	SAIS Submission Setup	Setup	Auto Processing
10	The Number of Days in a Month:	Immunization Definition	Options	Vaccination Rule Engine Settings

Search Setup Option Screen

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

District Setup

Menu ▾ | Save | Undo | X

District Setup

Options | System | Grade Setup | **TeacherVUE** | Labels | Auto-Sequence | Reports | Waivers | Mobile Apps | Concurrent Options

Accessibility | Color Themes

The number of days historically, the teacher can take attendance:

- Use Valid School Days Instead of Calendar Days for TeacherVUE Historical Attendance
- Allow teacher to send communications in TeacherVUE
- Enable Special Ed IEP Access in TeacherVUE
- Attach PWN to IEP
- Enable Special Ed IEP At A Glance Access in TeacherVUE
- Enable Special Ed BIP Access in TeacherVUE
- Enable Special Ed FBA Access in TeacherVUE
- Enable Special Ed 504 Plan Access In TeacherVUE
- Enable Special Ed Placement Determination Access in TeacherVUE
- Enable Evaluation Report in TVUE
- Enable SE Document Access in TeacherVUE Group Focus
- Show Deceased Parents / Guardians in TeacherVUE
- Allow teacher to enter notes for students in TeacherVUE
- Allow substitutes to enter notes for students in TeacherVUE
- Display list attendance by section
- Show daily attendance for sections marked exclude from attendance

The number of days into the future, the teacher can take attendance:

- Suppress student's gender in TeacherVUE
- Default twice daily attendance to both

District Setup Screen, TeacherVUE Tab

Chapter 3: Finding and Sorting Records

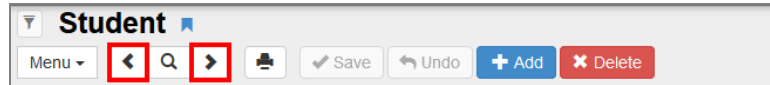
Scrolling to Find Records	121
Searching by Primary Field	122
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Searching Using Find Result	129
Searching Using Grids	134
Printing or Exporting Find Results	136
Using Filters	137
Creating Charts	139
Searching Using Chooser	148
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List Options	163

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 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

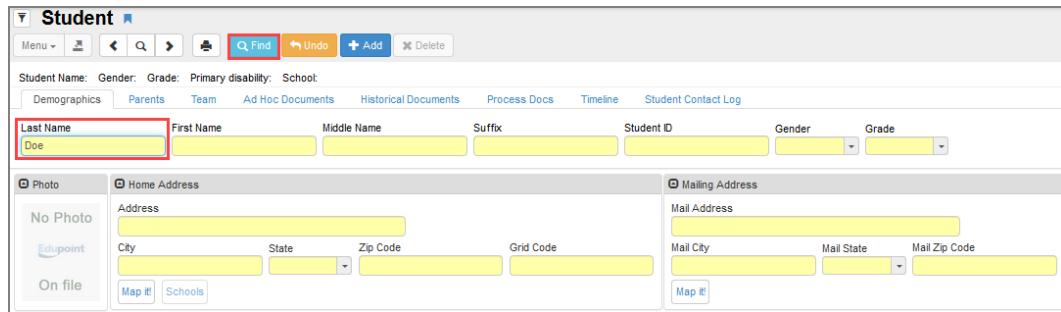


Screens open in Find mode when you log in to Synergy SIS. The fields display in yellow to indicate that the screen is in Find mode. Once you select a student record, that student's records display on all of the student-related screens. For example, if you look at a student's record on the Student screen,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

The screenshot shows the 'Student' screen in Find mode. The top toolbar includes a search icon, 'Find', 'Undo', '+ Add', and 'Delete' buttons. Below the toolbar, there are tabs for 'Demographics', 'Parent/Guardian', 'Other Info', 'Emergency', 'Enrollment', 'Enrollment History', 'Classes', and 'Documents'. The main form contains fields for 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'State ID', 'Grade', and 'Gender', all of which are highlighted in yellow. Below this is a section for 'Student Information' with fields for 'Home Language', 'Spoken to Student at Home', 'Nick Name', 'Last Name Goes By', 'AKA First Name', 'AKA Middle Name', 'AKA Last Name', 'AKA Suffix', 'State ID', 'Birth Date', 'Birth Place', 'Birth Verification', 'Birth Certificate Num', 'Birth State', 'Birth Country', 'Email', and 'EdFi ID'. A 'Resolve ID' button is also present.

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

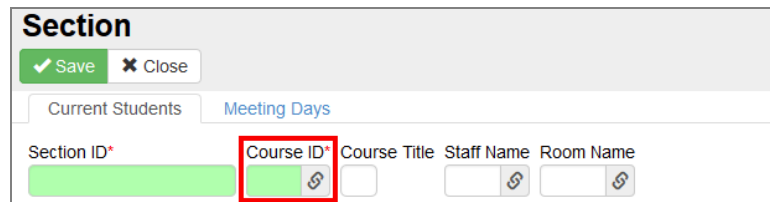
Synergy SIS contains an autocomplete feature for fields that rely on foreign key (FK) lookups. These are any fields that include a lookup icon . Examples of these fields on the Section screen include the **Course ID**, **Staff Name**, and **Room Name** fields.

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.



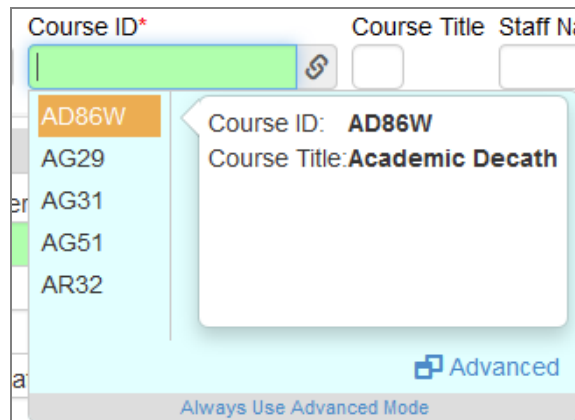
The following example uses the **Course ID** field on [Synergy SIS > Schedule > Section](#).



The screenshot shows the 'Section (Add) Screen' with a form containing several fields: Section ID*, Course ID*, Course Title, Staff Name, and Room Name. The Course ID* field is highlighted with a red box and contains a small icon representing a lookup or foreign key relationship.

Section (Add) Screen

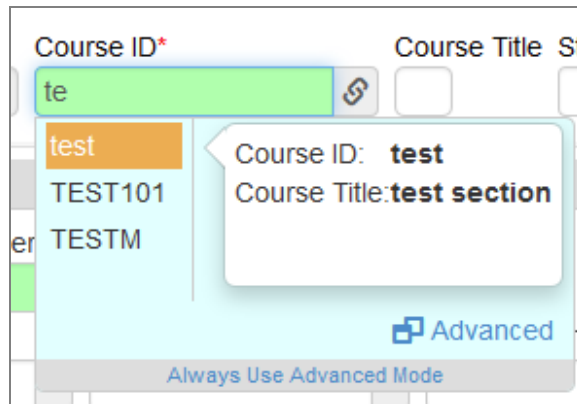
2. Select the field. A window opens displaying suggested values for that field.



The screenshot shows the 'Course ID Autocomplete' window. The Course ID* field is selected, and a dropdown menu displays suggested values: AD86W, AG29, AG31, AG51, and AR32. The AD86W option is highlighted. A tooltip shows the Course ID: AD86W and Course Title: Academic Decath. An Advanced button is visible at the bottom right.

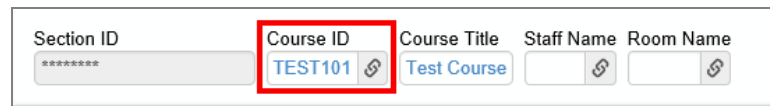
Course ID Autocomplete

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

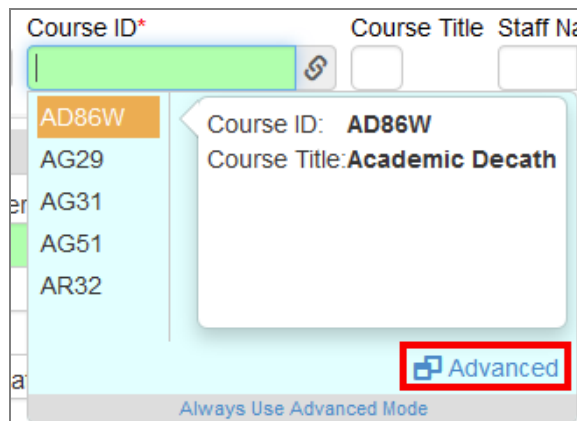
Selecting Advanced Mode opens the Find lookup screen. The Find screen contains a toggle to enable or disable Advanced Mode when selecting the field.

1. Select the FK field.



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

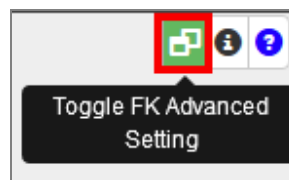
2. Click **Advanced** in the lower-right corner of the Autocomplete window. The Find screen opens.



Course ID Autocomplete

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

Find: Course Screen

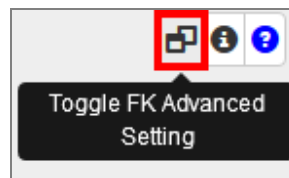


Advanced Mode Enabled

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

Course ID Autocomplete

- 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.

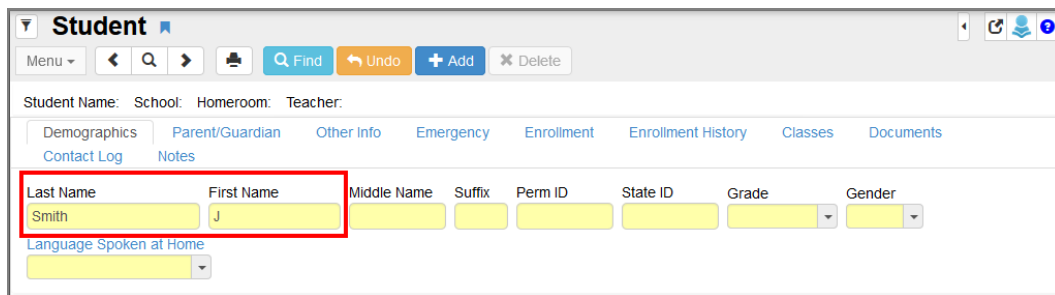
Using Keywords

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.

A screenshot of the 'Student' screen search form. The 'Last Name' field contains 'Smith' and the 'First Name' field contains 'J'. These two fields are highlighted with a red box. Other fields include 'Middle Name', 'Suffix', 'Perm ID', 'State ID', 'Grade', and 'Gender'. Below the form are tabs for 'Demographics', 'Parent/Guardian', 'Other Info', 'Emergency', 'Enrollment', 'Enrollment History', 'Classes', and 'Documents', along with 'Contact Log' and 'Notes'.

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.

The image shows two examples of the search interface. Each example has two input fields: 'Last Name' and 'First Name'. Below the fields is a dropdown menu for selecting a condition. In the top example, the 'AND' condition is selected, and the 'First Name' field contains 'Abb*'. In the bottom example, the 'OR' condition is selected, and the 'First Name' field contains 'B'.


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 [Save As Filter](#) Filter Name: Make Active

Students

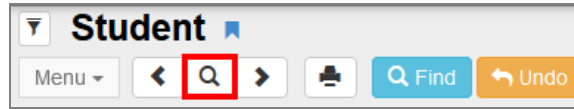
134 ROWS (170ms)

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	889644		0001320886	01		99999

Find Result Screen

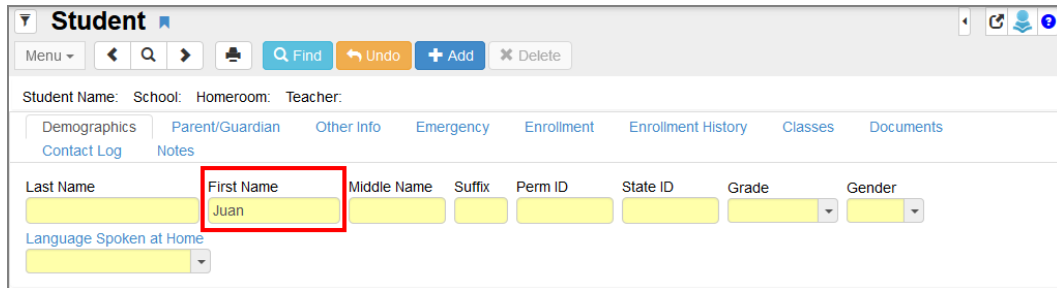
Search Using Secondary Fields

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.

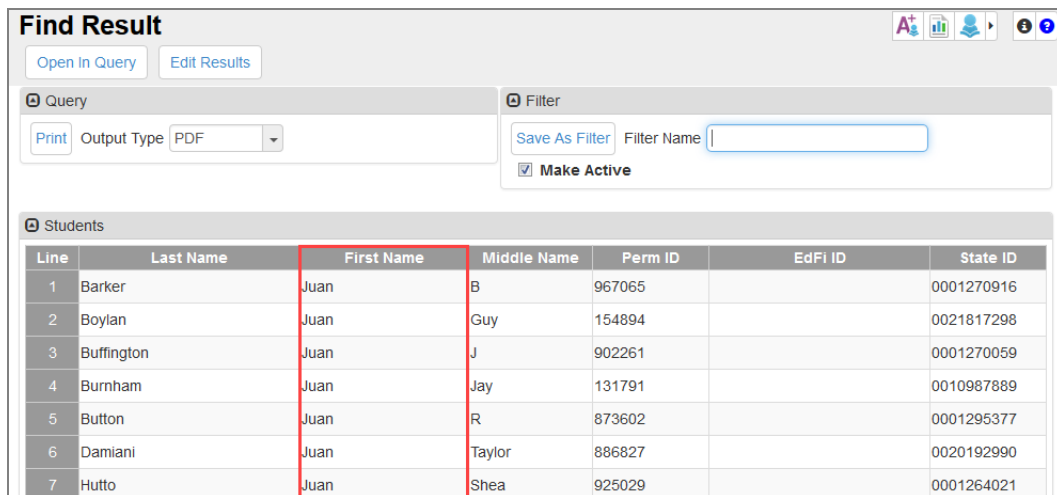

 A screenshot of the 'Student' screen showing the search criteria entry. The 'First Name' field in the student information section is highlighted with a red box and contains the text 'Juan'. Other fields like 'Last Name', 'Middle Name', 'Suffix', 'Perm ID', 'State ID', 'Grade', and 'Gender' are also visible but empty. The interface includes a toolbar with 'Find', 'Undo', '+ Add', and 'Delete' buttons, and a tabbed menu with options like 'Demographics', 'Parent/Guardian', 'Other Info', 'Emergency', 'Enrollment', 'Enrollment History', 'Classes', and 'Documents'.

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.


 A screenshot of the 'Find Result' screen. At the top, there are buttons for 'Open In Query' and 'Edit Results'. Below that is a 'Query' section with a 'Print' button and an 'Output Type' dropdown set to 'PDF'. To the right is a 'Filter' section with a 'Save As Filter' button, a 'Filter Name' input field, and a checked 'Make Active' checkbox. The main content is a table titled 'Students' with the following data:

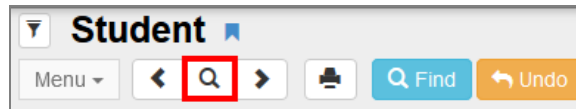
Line	Last Name	First Name	Middle Name	Perm ID	EdFI ID	State ID
1	Barker	Juan	B	967065		0001270916
2	Boylan	Juan	Guy	154894		0021817298
3	Buffington	Juan	J	902261		0001270059
4	Burnham	Juan	Jay	131791		0010987889
5	Button	Juan	R	873602		0001295377
6	Damiani	Juan	Taylor	886827		0020192990
7	Hutto	Juan	Shea	925029		0001264021

 The 'First Name' column in the table is highlighted with a red box.

Find Result Screen

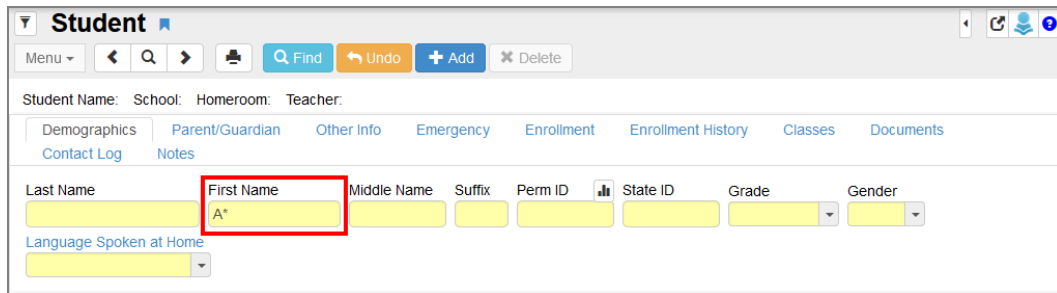
Search Using *

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.

- 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.

Line	Last Name	First Name	Middle Name	Perm ID
1	Abnernethy	Anne	Elizabeth	902870
2	Acevedo	Ashley		901830
3	Adair	Alan	William	871626
4	Adams	Albert	Lee	889844
5	Adamski	Alan	M	872035
6	Aitchison	Alice	Elizabeth	871731
7	Akagawa	Adam	Hidetake	165923
8	Akin	Andrea	Ellen	902875
9	Allen	Aaron	Lee	992938
10	Allen	Andrea		904134
11	Ament	Alice	J	886362
12	Anaya	Anthony	Carlos	118268
13	Anderson	Ann	Marie	873834
14	Archer	Annie	Caroline	915423
15	Ardis	Anne	Leann	140843

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.

<	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	...	159	>	3,171 ROWS (154ms)
---	---	---	---	---	---	---	---	---	---	----	----	----	----	----	----	-----	-----	---	--------------------


Find Result Screen

- Click the page number to display a specific page. Click > to advance to the next page. Click ... to see additional page numbers.
- Hover your mouse over a page number to view the index of the records displayed on that page.

Go to page: 13 (Birtcher-Bliven)																			
<	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	...	159	>	3,171 ROWS (154ms)

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.

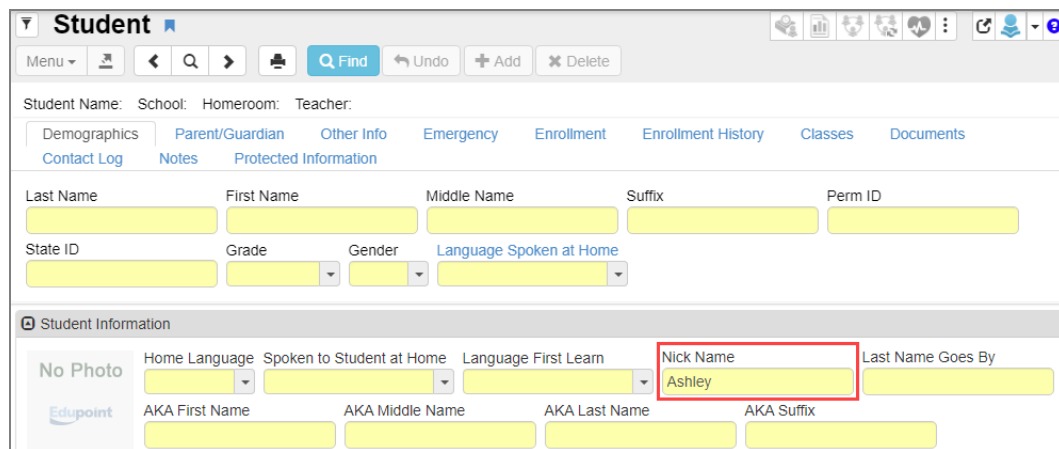
Loading Find Results Immediately

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.



The screenshot shows the 'Student' information screen. At the top, there are navigation buttons: Menu, Find, Undo, Add, and Delete. Below that, there are tabs for Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, and Documents. The 'Student Information' section contains various input fields. The 'Nick Name' field is highlighted with a red box and contains the text 'Ashley'. Other fields include Last Name, First Name, Middle Name, Suffix, Perm ID, State ID, Grade, Gender, Language Spoken at Home, Home Language, Spoken to Student at Home, Language First Learn, Last Name Goes By, AKA First Name, AKA Middle Name, AKA Last Name, and AKA Suffix.

Student Screen

- 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

Menu

Student Name: **Jones, Barbara M.** School: **Hope High School** Homeroom: **ANNX** Teacher: **Ferrigno, L.**

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History Classes Documents
Protected Information Contact Log Notes

Last Name: Jones First Name: Barbara Middle Name: Marae Suffix: Perm ID: 964066
State ID: 0001270475 Grade: 11 Gender: Female Track:

Student Information

Home Language: English Language To Home: Language First Learn: Nick Name: Ashley Last Name Goes By:
AKA First Name: AKA Middle Name: AKA Last Name: AKA Suffix:
State ID: 0001270475 Birth Date: 03/05/2003 Birth Place: Mesa Birth Verification: Birth Certificate or Affidavit

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.



Line	Student Name	Gender	Street Address	City	Grade	School
<i>This grid does not support search functionality.</i>						

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.

- Navigate to **Synergy SIS > Student > Student**.
- Click  to enter the Find mode.

3. Scroll to the Phone Numbers grid.


The screenshot shows the 'Student' record page. At the bottom, the 'Phone Numbers' section is highlighted with a red border. It contains a table with the following columns: Line, Primary, Type, Phone, Extension, Contact, and Not Listed. The 'Primary' column has a checkbox, and the 'Type' column has a dropdown menu.

Line	Primary	Type	Phone	Extension	Contact	Not Listed
	<input type="checkbox"/>				<input type="checkbox"/>	<input type="checkbox"/>

Student Screen

4. Select **Primary**.

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

 You can select multiple options in a drop-down.

This screenshot shows the 'Phone Numbers' grid with the 'Primary' checkbox checked and 'Cell' selected in the 'Type' dropdown menu. The 'Phone' and 'Extension' fields are highlighted in yellow.

Line	Primary	Type	Phone	Extension	Contact	Not Listed
	<input checked="" type="checkbox"/>	Cell			<input type="checkbox"/>	<input type="checkbox"/>

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						
Query				Filter		
<input type="button" value="Open In Query"/> <input type="button" value="Print"/> Output Type: PDF <input type="button" value="Edit Results"/>				<input type="button" value="Save As Filter"/> Filter Name: <input type="text"/> <input checked="" type="checkbox"/> Make Active		
Students						
Line	Last Name	First Name	Middle Name	Perm ID	Phone Numbers	
					Primary	Type
1	Goodman	Jeffrey	Kenneth	997039	<input checked="" type="checkbox"/>	Cell
2	Haase	Susan		997037	<input checked="" type="checkbox"/>	Cell
3	Jones	Bob		997066	<input checked="" type="checkbox"/>	Cell

Find Result Screen

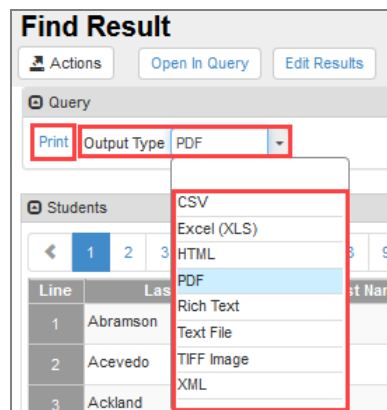
Printing or Exporting Find Results

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

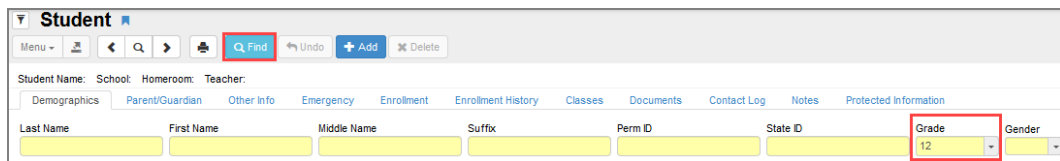
Using Filters

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

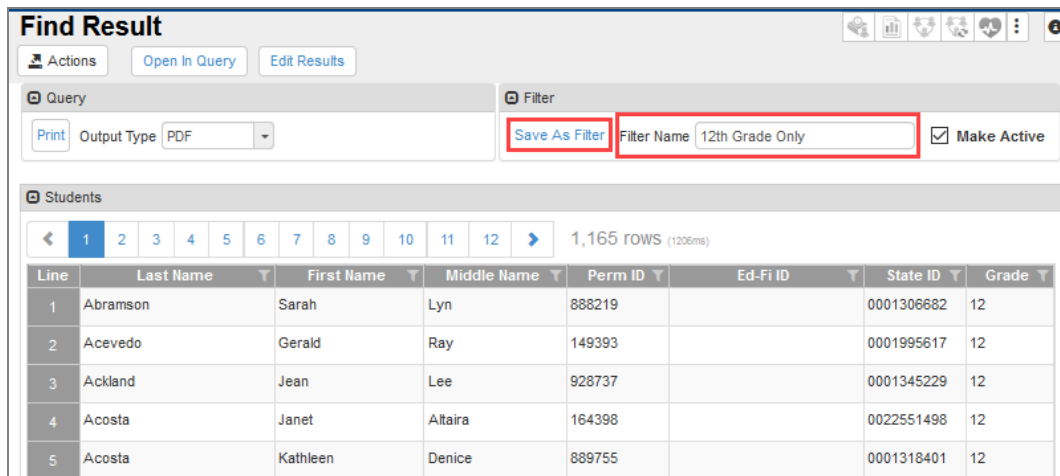
System filters are created from the Find Result screen using the **Save as Filter** button.

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



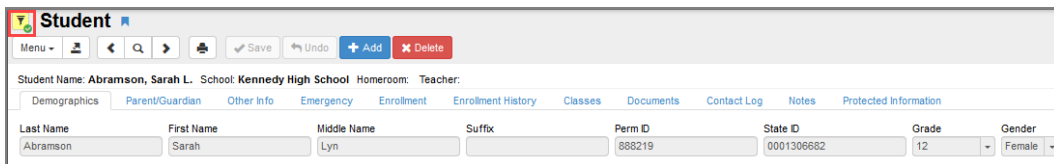
Student Screen

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 .



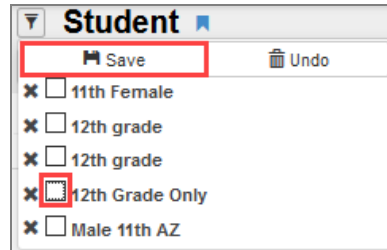
Student Screen

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

Deactivating a Filter

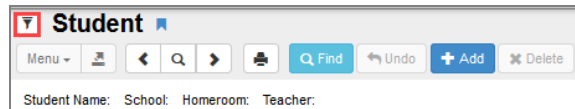
Clicking the Filter icon displays a list of all of the user's previously saved filters. Filters with a checkmark are currently active.

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.

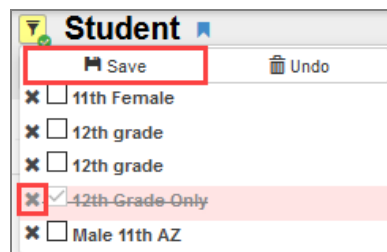


Student Screen

Deleting Filters

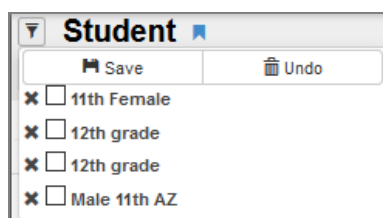
Clicking the Filter icon displays a list of all of the user's previously saved filters.

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

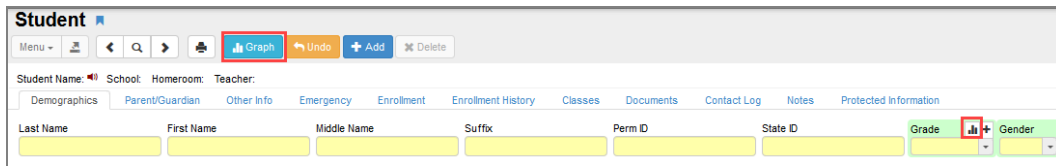
Creating Charts

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

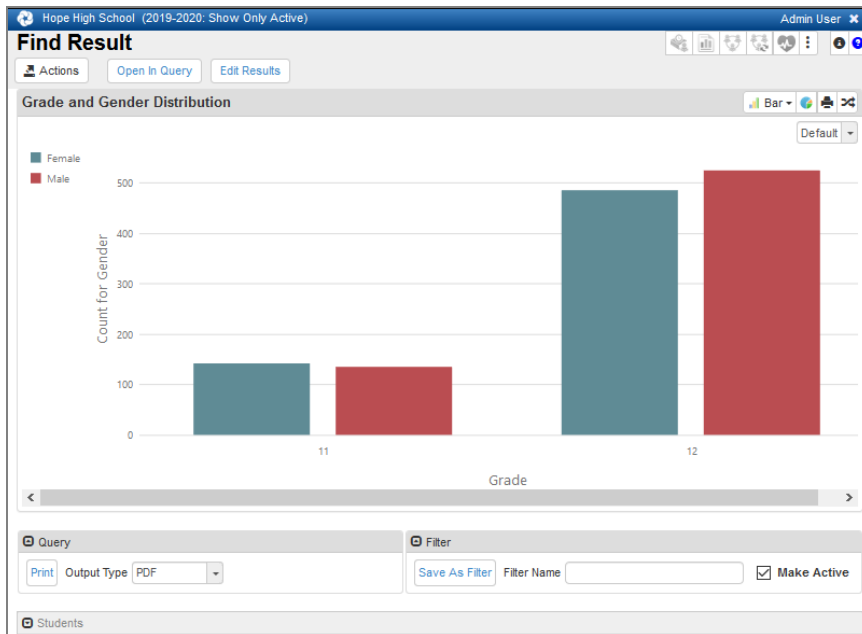
1. Hover over the field and click  (Toggle Graph Mode icon) for each data element to graph.

 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.



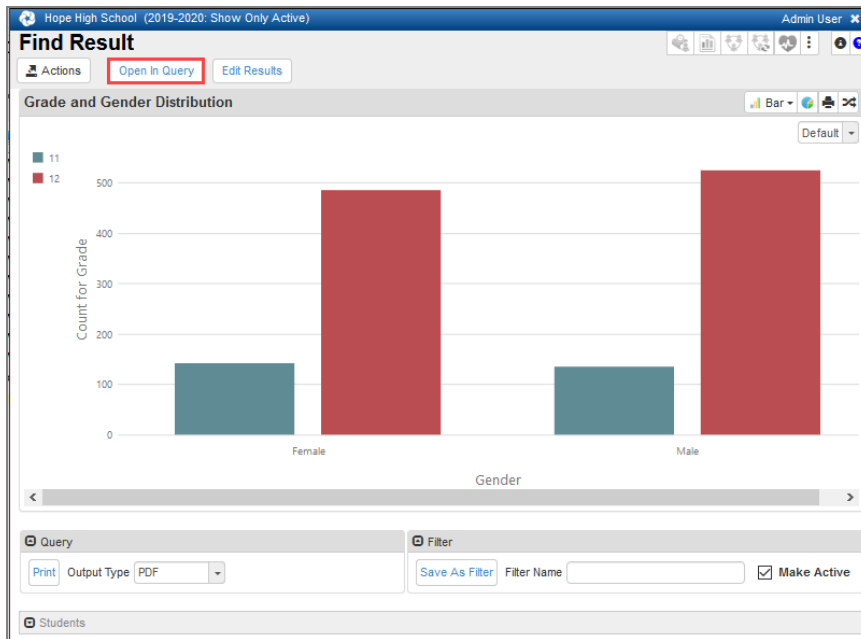
Student Screen



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

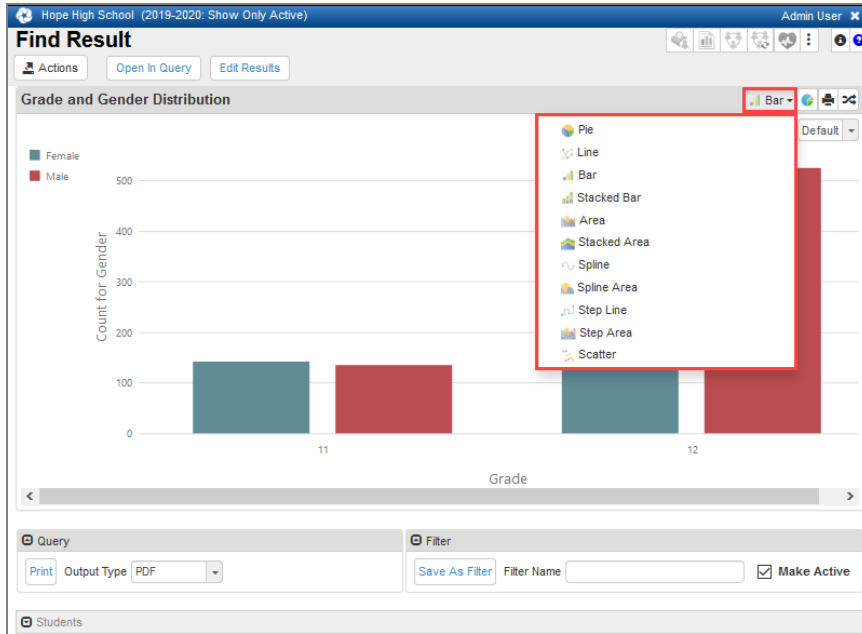
The screenshot shows the 'Query' configuration screen. At the top, there are 'Menu' buttons: 'Save', 'Open', 'Execute', 'Delete', and 'Clear All'. Below these are tabs for 'Columns', 'Conditions', 'Sort', and 'Type in Query'. The main area is titled 'Start Here! Enter the details about your query:'. It includes fields for 'Name', 'Group', 'Type' (set to 'Select'), 'Output Type' (set to 'PDF'), 'Orientation' (set to 'Portrait'), and 'Type' (set to 'New'). There is also a 'Description' field and a checkbox for 'Allow Results To Be Edited'. Below this is the 'Business Objects' section, which shows a tree view with 'Student (R0)' and 'StudentSOREnrollment (R1)'. A 'Filter' dropdown is open, showing a list of properties to add to the list, such as 'AddDateTimeStamp', 'AddIDStamp', 'AddressChgDate', etc. At the bottom, there is a 'Property Overrides' table with columns: 'Name', 'Label Override', 'Width', 'Hide Group', 'Break', 'Display Type', and 'Aggregate'. The table lists various properties like 'LastName (Student)', 'FirstName (Student)', 'MiddleName (Student)', 'SisNumber (Student)', 'EdfID (Student)', 'StateStudentNumber (Student)', 'Grade (StudentSOREnrollment)', and 'Gender (Student)'. Each row has checkboxes and dropdown menus for configuration.

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.

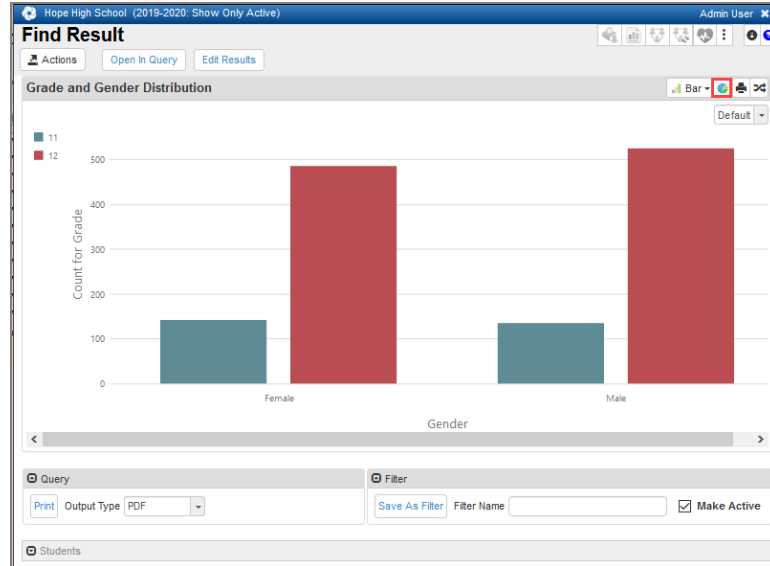
1. Select a different chart type from the chart menu to change it.



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

Name: Graph Student ON (R1_Grade,R0_Gender) Group: Miscellaneous Focus Based: Y Widget Type: Query

Options: Advanced Rules User Groups Subscribed Users

Name: Graph Student ON (R1_Grade,R0_Genc) Group: Miscellaneous Widget Type: Query Inactive: Widget ID: 31

Description:

Title:

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width:

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

600 800

Query

Public query providing data for dashboard control Focus Based

Graph Student ON (R1_Grade,R0_Gender)

Do not allow user to open query

Do not allow user to print report

Do not allow user to open query detail

Graph Options

GraphType: Bar

X Column: R0_Gender Value to Start the X Axis From:

Y Column: R1_Grade Value to Start the Y Axis From:

Order Graph Data in Query Sorted Order

All Colors are Opaque

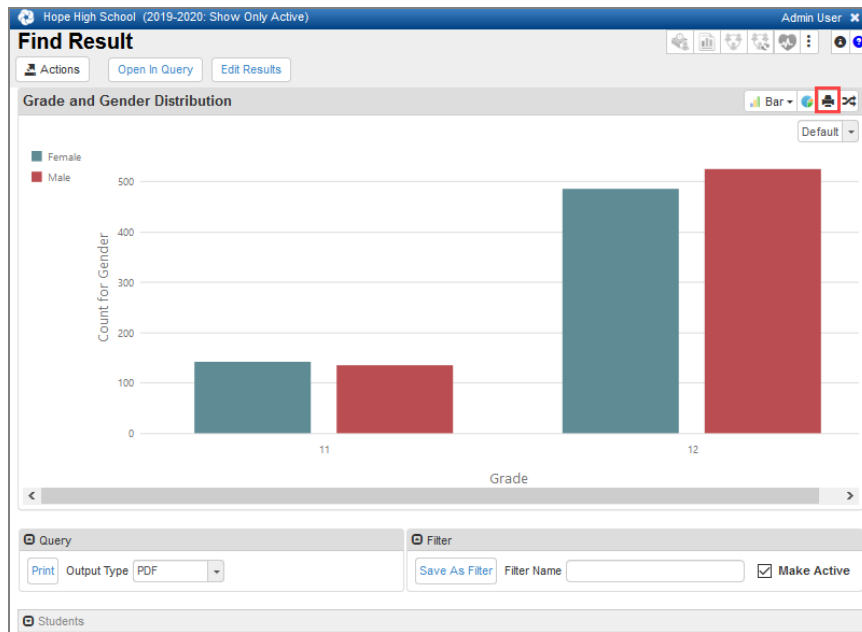
Chart is Rendered in 3D

Graph Show Data Labels

Dashboard Control Screen

Printing the Chart

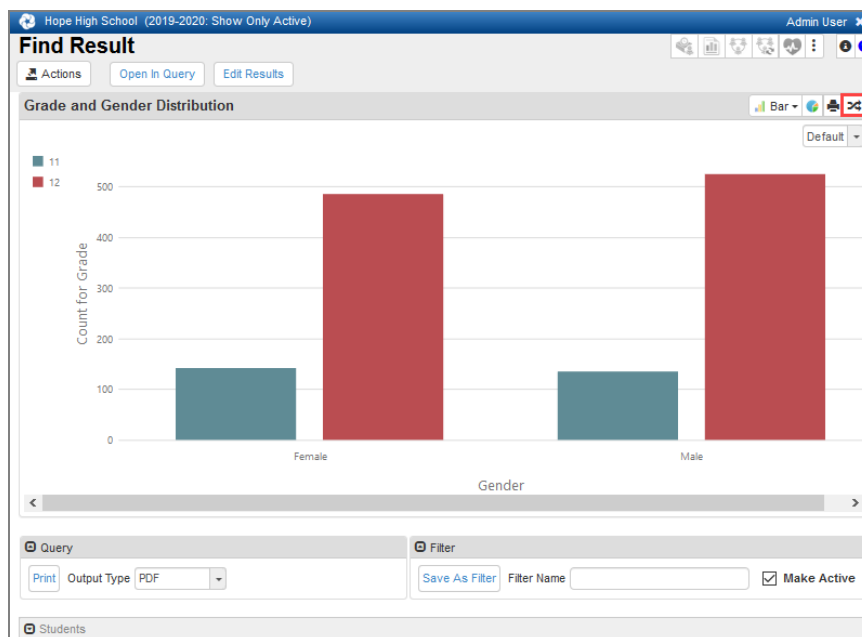
1. Click the Print This Chart icon  to send the chart to a printer.



Find Result Screen

Inverting Series Results

1. Click the Invert Series Results icon  to switch the X and Y axes.

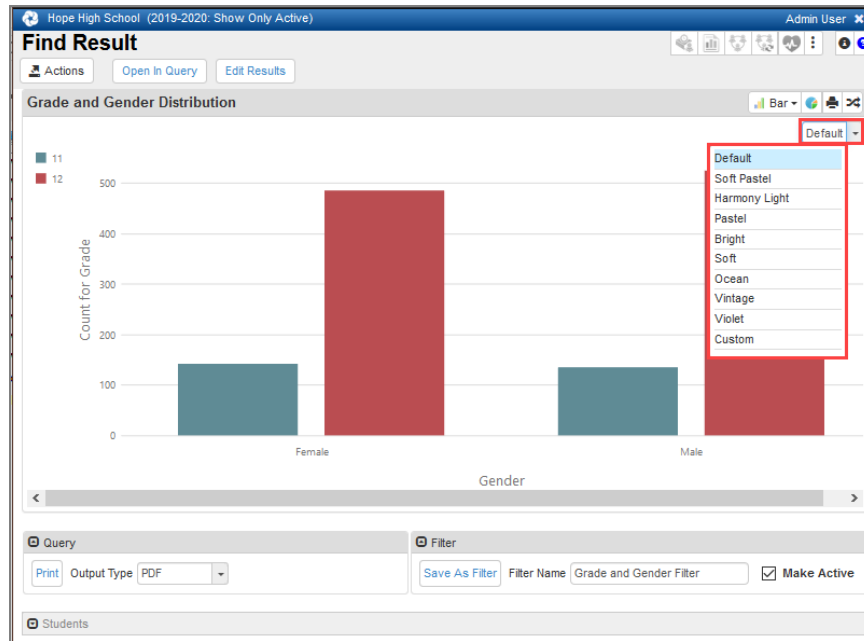


Find Result Screen

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**.

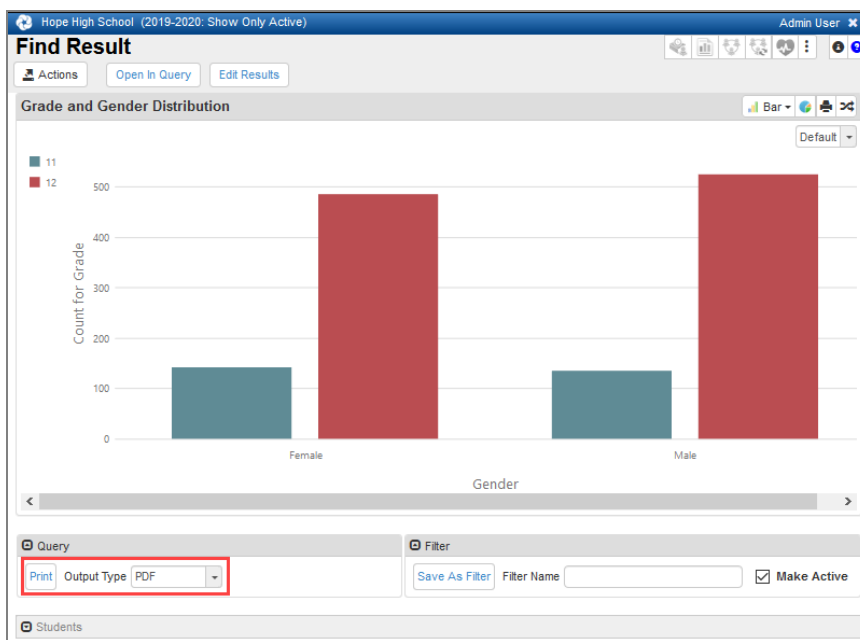


All of the selections include a list of the students included in the data; however, not all of the selections include the chart in their output.

2. Click **Print**.



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

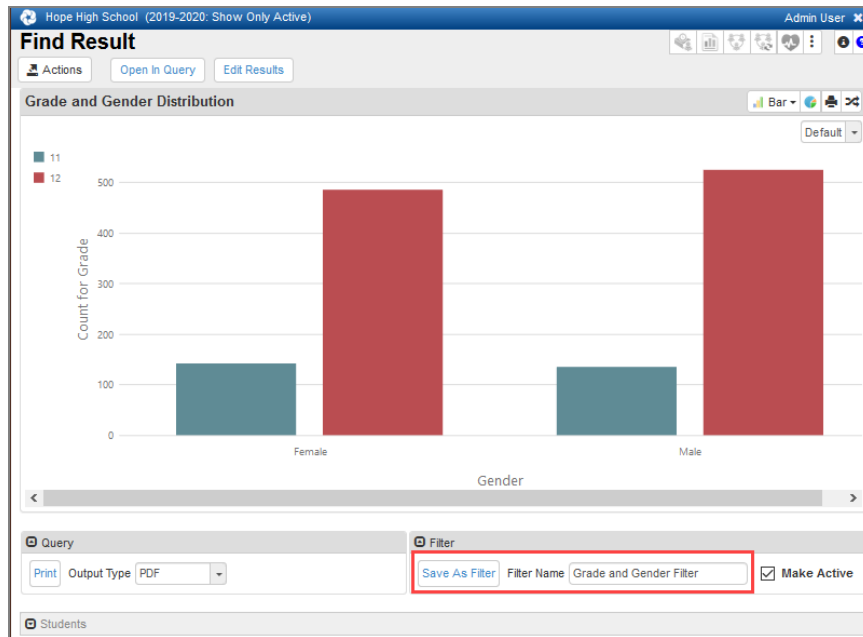


Find Result Screen

Creating Filters


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

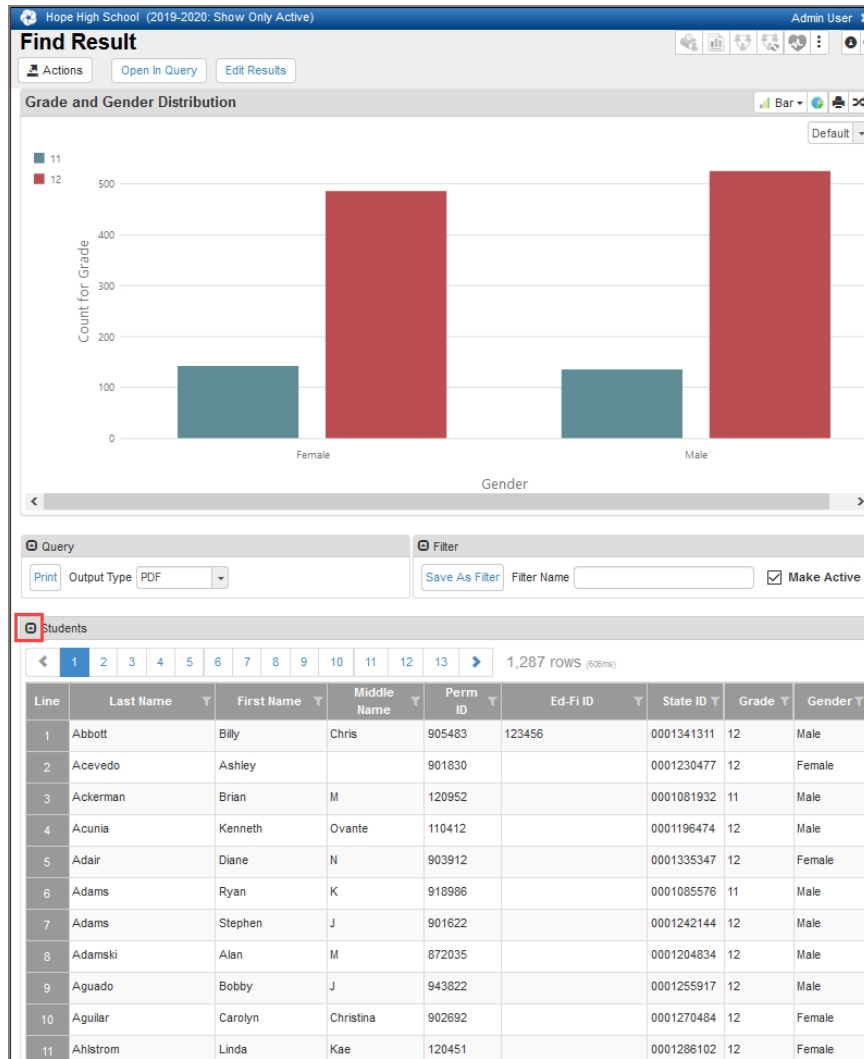
1. Enter a **Filter Name**.
2. Click **Save As Filter**.



Find Result Screen

Viewing the Students Included in the Chart Results

1. Click the arrow  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.

The screenshot shows the 'Section' configuration screen. At the top, it displays 'Section ID: 123', 'Course Title: English Composition', and 'School Year: 2019-2020'. Below this are tabs for 'Current Students', 'Student Enrollment History', 'Meeting Days', 'Additional Staff', 'Staff History', 'Schedule Matrix', and 'Pathways'. The main area contains several form fields: 'Section ID' (123), 'Course ID' (EN72), 'Course Title' (English Composition), 'Staff Name' (Smith, Jay), and 'Room Name'. There are also checkboxes for 'Cooperative Learning' and 'Work Based Learning Code'. Below these are sections for 'Restrictions' (Grade Range Low: 09, Grade Range High: 12, Gender Restriction, Credit: 0.500, House), 'Staff Contributions' (Responsibility, Amount), and 'TeacherVUE Security' (Primary Staff Attendance, Additional Staff Attendance). At the bottom, there is a 'Students' section with a 'Chooser' button highlighted in red. Below the button is a table of students:

Line	Student Name	Perm ID	Gender	Resolved Race/Ethnicity	Pathways House	Pathways Team	Grade	Enter Date	Leave Date
1	Grammer, Rebecca	997034	Female	White			11	08/12/2019	
2	Lane, Penny	997032	Male	White			11	09/25/2019	
3	MacCallit, Whatcha	997035	Male	White			12	08/12/2019	
4	Nator, Bacon	997033	Male	White			12	08/12/2019	

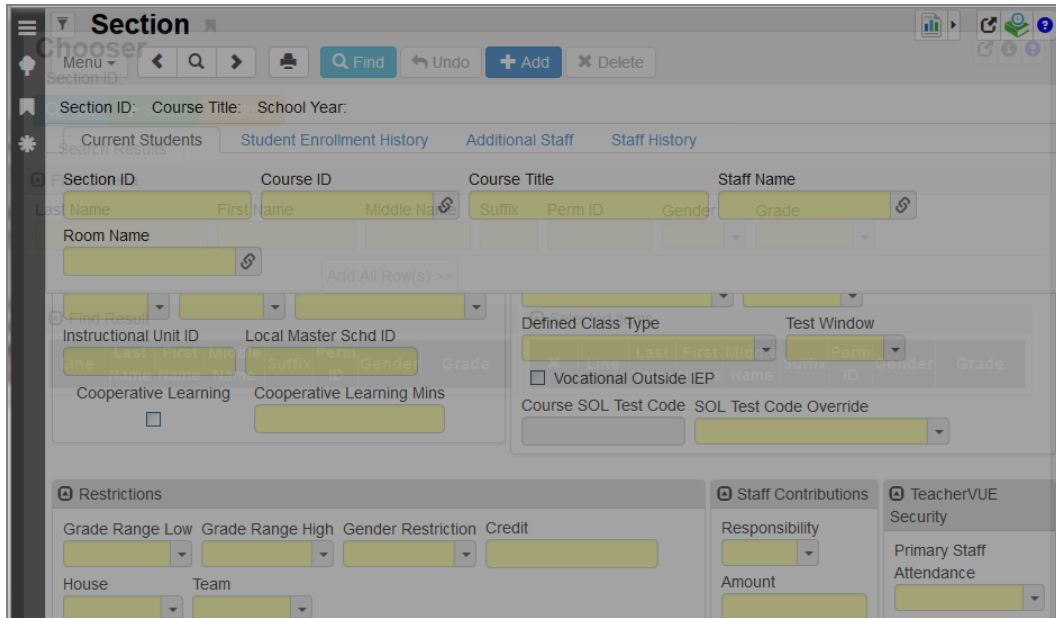
Section Screen

The Chooser screen provides several search fields.

The screenshot shows the 'Chooser' search interface. At the top, it displays 'Section ID:' and buttons for 'Find', '+ Select', and 'Close'. Below this is a 'Search Results' field. The 'Find Criteria' section contains several input fields: 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'Gender', and 'Grade'. Below the criteria is an 'Add All Row(s) >>' button. The 'Find Result' section shows a table with columns: 'Line', 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'Gender', and 'Grade'. The 'Selected Items' section shows a table with columns: 'Line', 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', 'Gender', and 'Grade'.

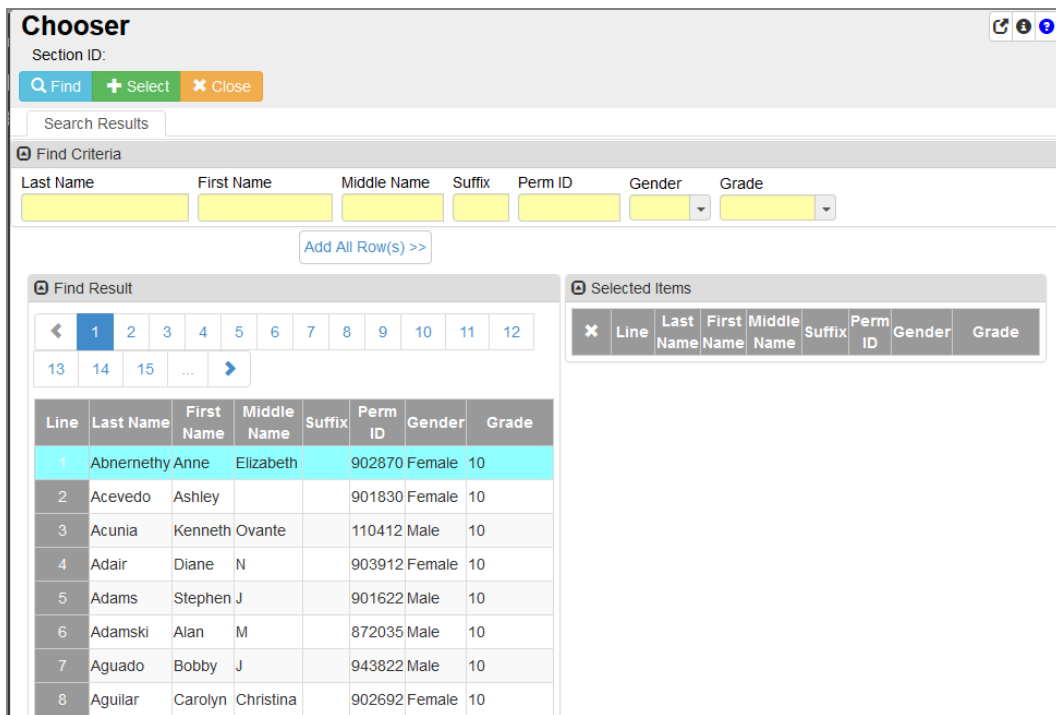
Chooser Screen

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 **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   

Section ID:


Find

Search Results

Find Criteria

Last Name First Name Middle Name Suffix Perm ID Gender Grade

Find Result

1 2 3 4 5 6 7 8 9 10 11
12 13 14 15 ... 



Line	Last Name	First Name	Middle Name	Suffix	Perm ID	Gender	Grade
2	Acevedo	Ashley			901830	Female	10
4	Adair	Diane	N		903912	Female	10
6	Adamski	Alan	M		872035	Male	10
7	Aguado	Bobby	J		943822	Male	10
9	Ahlstrom	Linda	Kae		120451	Female	10
10	Aitchison	Karen	L		902998	Female	10
11	Akin	Andrea	Ellen		902875	Female	10

Selected Items

Line	Last Name	First Name	Middle Name	Suffix	Perm ID	Gender	Grade
1	Abnernethy	Anne	Elizabeth		902870	Female	10
2	Acunia	Kenneth	Ovante		110412	Male	10
3	Adams	Stephen	J		901622	Male	10
4	Aguilar	Carolyn	Christina		902692	Female	10
5	Alcazar	Eugene	A		141517	Male	10
6	Alexander	Joseph	J		901626	Male	10

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 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 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  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 🔍 ⓘ ⓧ

Student Name: **Acunia, Kenneth O.** SIS Number: **110412** Grade: **10** Gender: **Male**

Find
Close
Select
Clear Selection

Search Results

Find Criteria

Last Name: First Name: Middle Name:

Find Result


1
2

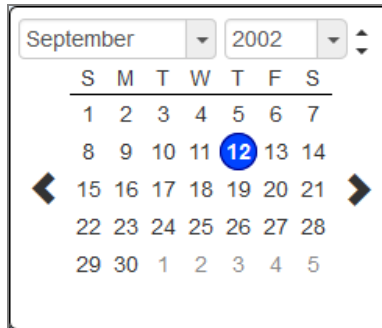
Line	Last Name	First Name	Middle Name
1	A/v Staff	A/v Staff	
2	Abel	Patricia	
3	Achtman	Harriet	
4	Adams	Laurie	
5	Adams	Ronald	
6	Addington	Rebecca	
7	Aderson	Gordon	

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.

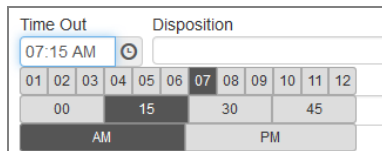
You can also click  and select the date. Today's date is highlighted in blue.



Synergy SIS Calendar

Enter Time

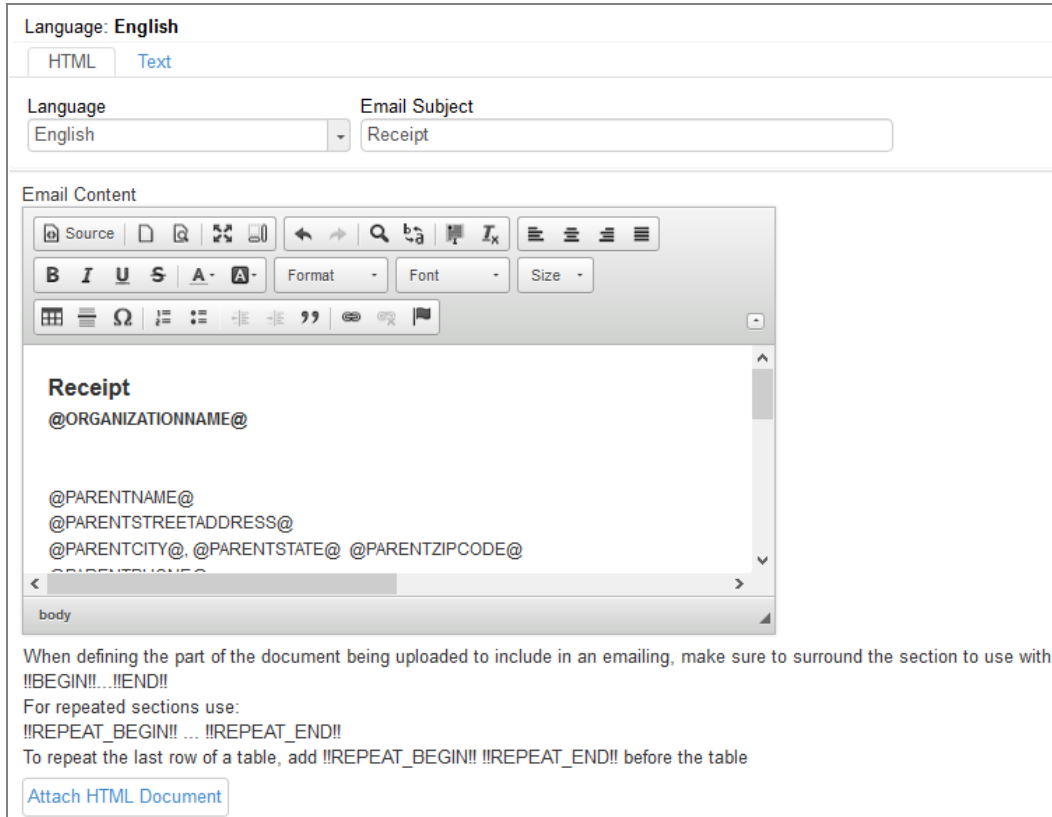
You can enter the time by typing the numerals of the time. The system formats the field once entered. For example, 900 formats as 9:00 AM. You can also click  and select the time.



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**.
















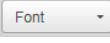



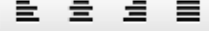
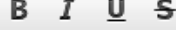



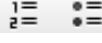




Formatting Window

-  **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 ``. 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 Horizontal 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

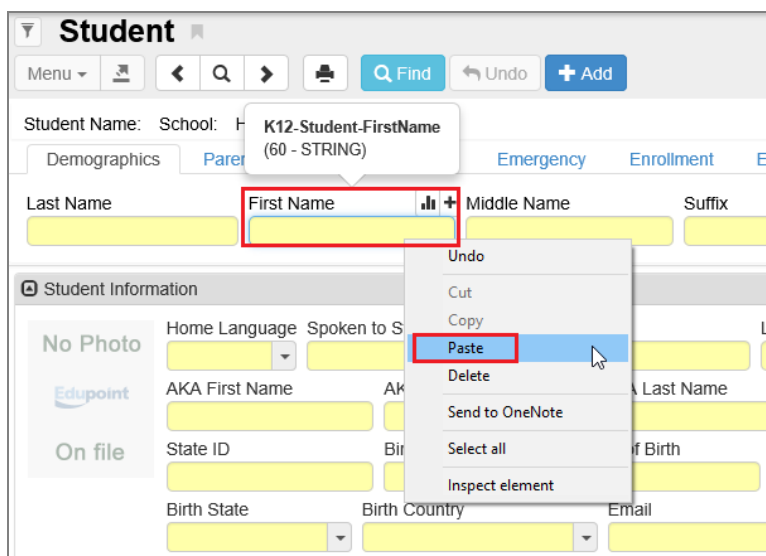
2. Navigate to **Synergy SIS > Student > Student**.
3. Paste data into the **First Name** field.



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  to toggle the condition from OR to AND. OR is the default condition when pasting lists.

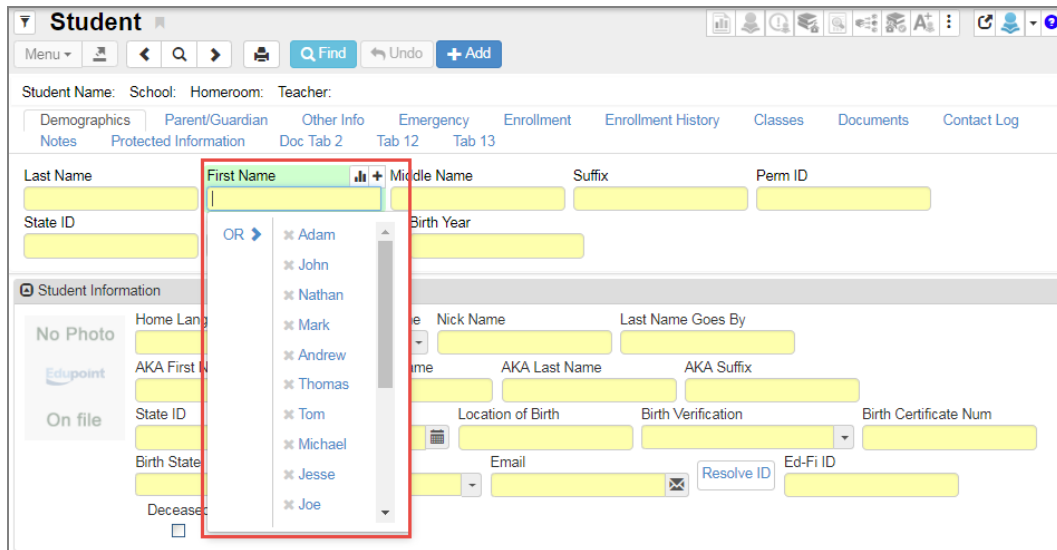


Click  to remove an item from the list.

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 .




The screenshot shows the 'Student' screen in Synergy SIS. The 'First Name' field is highlighted in green, and a dropdown menu is open, displaying a list of names: Adam, John, Nathan, Mark, Andrew, Thomas, Tom, Michael, Jesse, and Joe. The 'OR' condition is selected. The 'First Name' field is highlighted in green.

Student Screen

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

Line	Last Name	First Name	Middle Name	Perm ID	Ed-Fi ID	State ID
1	Acosta	John	Alvarez	150265		0020901578
2	Aelvoet	Jesse	Julius	944233		0001267727
3	Akagawa	Adam	Hidetake	165923		0022551726
4	Anderson	John	J.e.	930738		0001265136
5	Anderson	Mark	Michael	117346		0001247945
6	Arvanitas	Christina	T	892796		0001323856
7	Arvayo	Joe	Michael	909360		0001258783
8	Ashe	Johnny	James	948760		0001352520
9	Asturias	Jesse	A	956523		0001276594
10	Bacon	Jesse	M	886272		0001658044
11	Bailey	Michael	L	138214		0010520888
12	Baker	Christina	M	984564		0002940562
13	Baker	Michael	Ian	972425		0001354971

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.

	A	B	C	D
1	Adam	Smith	123456	
2	John	Jones	789456	
3	Nathan	Michaels	147258	
4	Mark	Lilly	369258	
5	Andrew	Adebayo	963852	
6	Thomas	Flynn	852741	
7	Tom	Harms	147963	
8	Michael	Houston	147852	
9	Jesse	Williams	159753	
10	Joe	Abrams	159963	
11	Ming	Huffman	159852	
12	Will	Bailey	159741	
13	William	Adams	357741	
14	Liam	Ahmed	357852	
15	Chris	Singh	357963	
16	Chistopher	Tsai	976132	
17	Mike	Yokohama	741753	
18	Louis	Takei	753369	

Excel Spreadsheet


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

The screenshot shows the 'Student' screen in Synergy SIS. The 'Perm ID' field is highlighted with a red box. A context menu is open over the field, with the 'Paste' option highlighted with a red box. The screen displays various tabs and fields for student information, including Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, and Enrollment History. The 'Perm ID' field is currently empty, and the 'Paste' option is available for pasting data from the Excel spreadsheet.


Student Screen

The names display in a condition field.

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


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

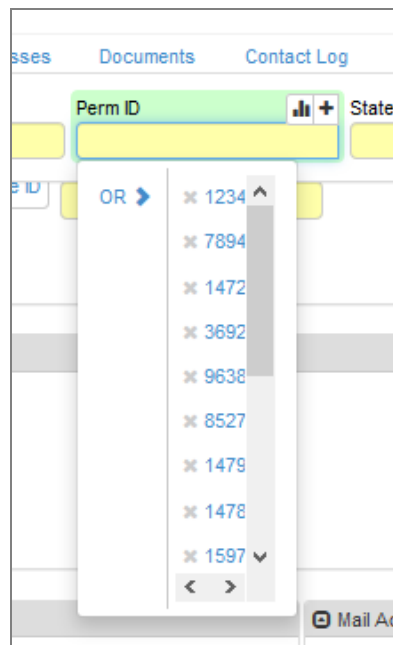


Click  to remove an item from the list.

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

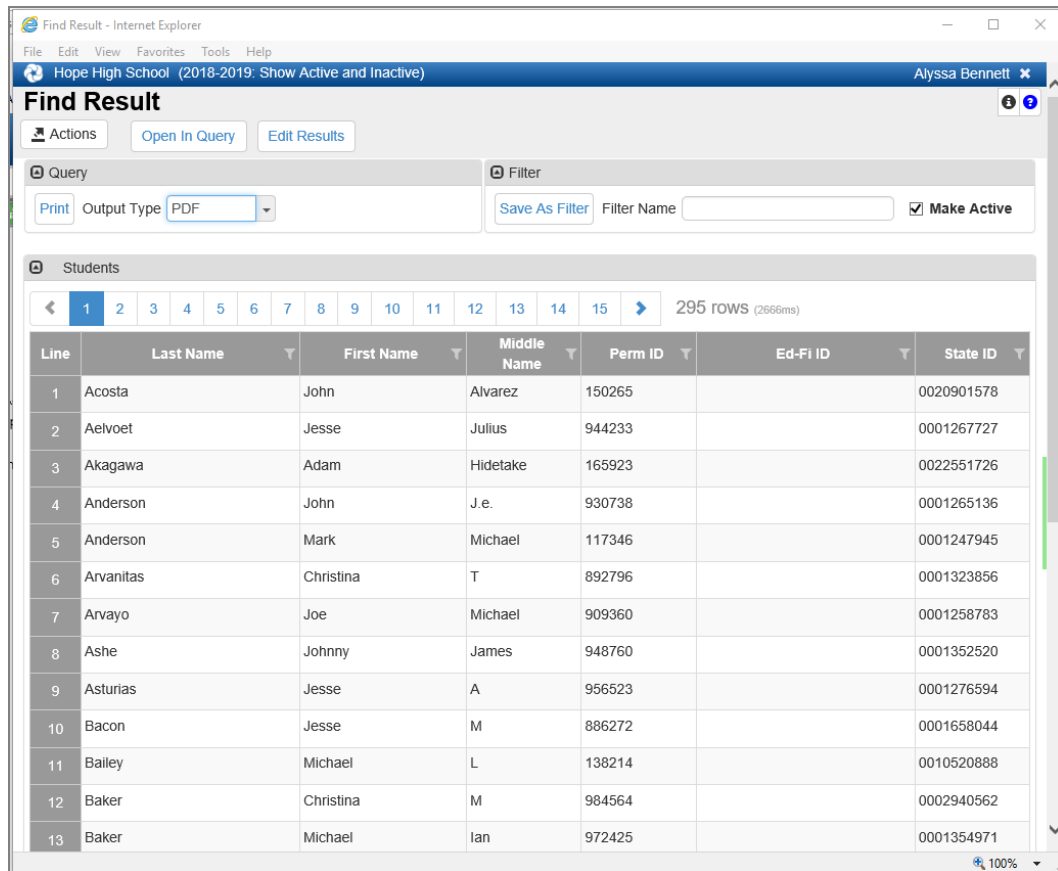
Enter a keyword and click + to add a criterion to a pasted list.

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



Student Screen

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



Find Result - Internet Explorer

Hope High School (2018-2019: Show Active and Inactive) Alyssa Bennett

Find Result

Actions: Open In Query, Edit Results

Query: Print, Output Type: PDF

Filter: Save As Filter, Filter Name: [], Make Active

Students: 295 rows (2668ms)

Line	Last Name	First Name	Middle Name	Perm ID	Ed-FI ID	State ID
1	Acosta	John	Alvarez	150265		0020901578
2	Aelvoet	Jesse	Julius	944233		0001267727
3	Akagawa	Adam	Hidetake	165923		0022551726
4	Anderson	John	J.e.	930738		0001265136
5	Anderson	Mark	Michael	117346		0001247945
6	Arvanitas	Christina	T	892796		0001323856
7	Arvayo	Joe	Michael	909360		0001258783
8	Ashe	Johnny	James	948760		0001352520
9	Asturias	Jesse	A	956523		0001276594
10	Bacon	Jesse	M	886272		0001658044
11	Bailey	Michael	L	138214		0010520888
12	Baker	Christina	M	984564		0002940562
13	Baker	Michael	Ian	972425		0001354971

Find Result Screen



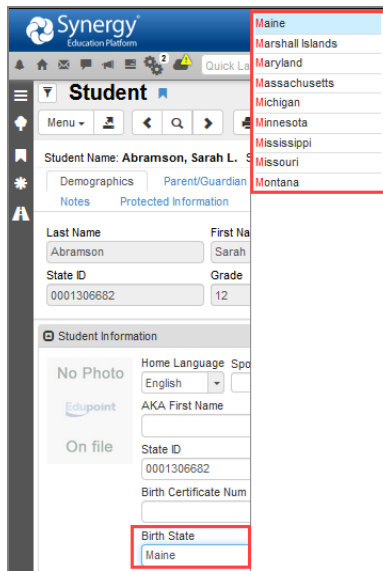
When you paste a list into a field on the Chooser screen, the results automatically display in the Selected Items section.

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.

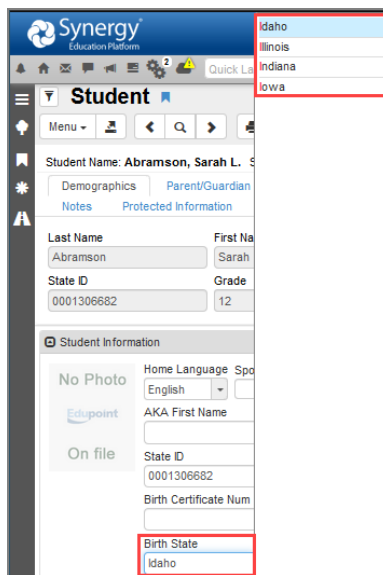
Match Items by a Single Letter

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

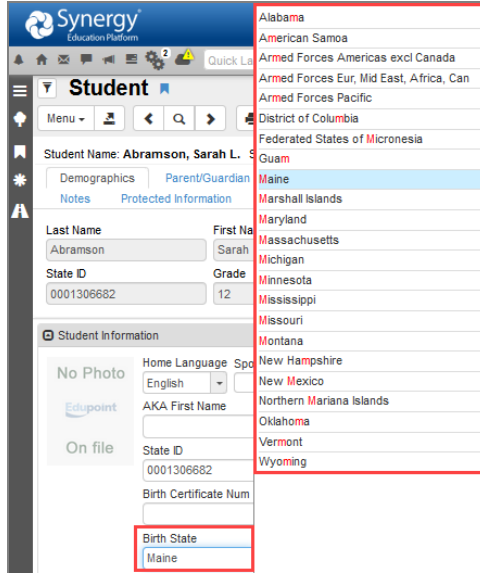
If you then enter *I*, the values beginning with *M* clear and the values beginning with *I* display instead.



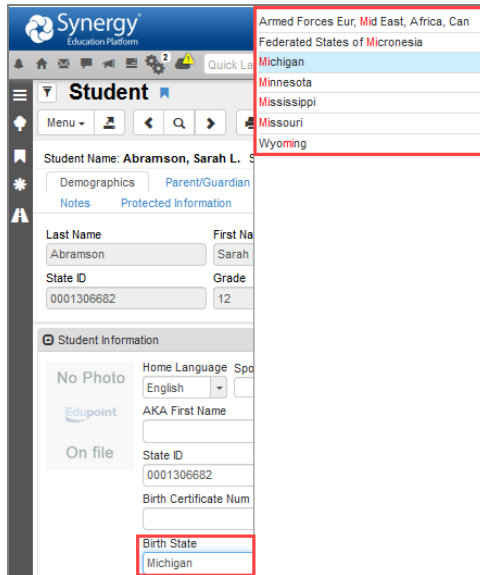
Student Screen, Match Items By A Single Letter Example

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.



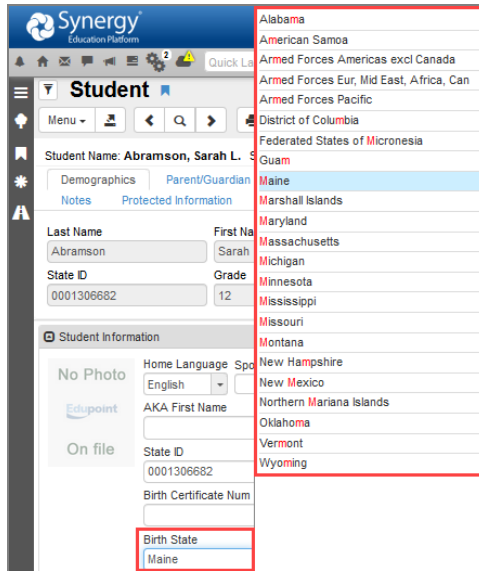
Student Screen, Match Items By Sequence Of Letters Example



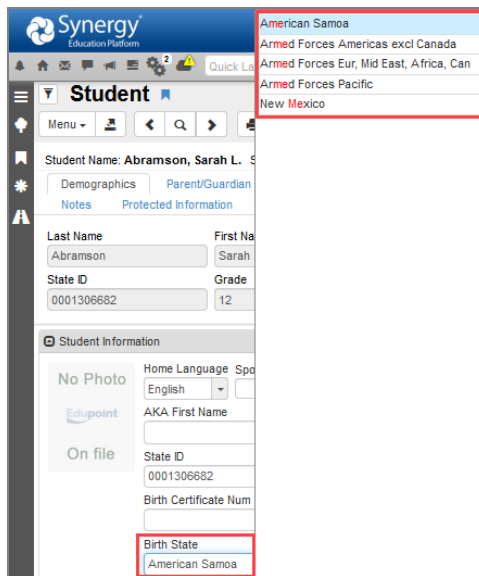
Student Screen, Match Items By Sequence Of Letters Example

Hybrid Match Strategy

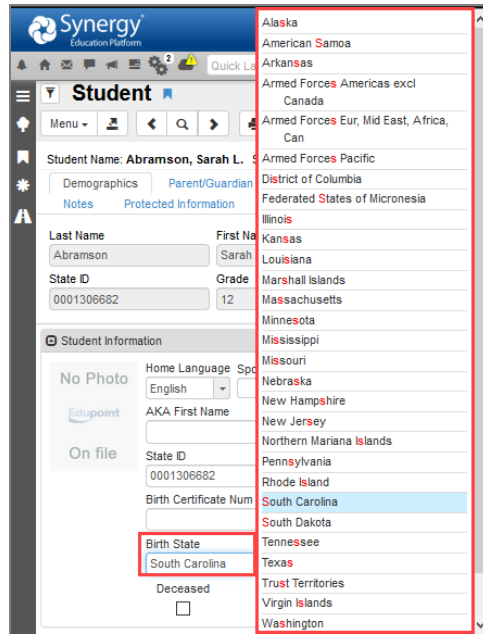
Synergy SIS matches by the last character typed if the sequence typed has no match. If you enter *M*, then *E*, then *S* in a state list, the values Maine (the first M state), then American Samoa (the first ME state), then South Carolina (the first S state) are selected.



Student Screen, Hybrid Match Strategy Example



Student Screen, Hybrid Match Strategy Example



Student Screen, Hybrid Match Strategy Example

Chapter 4: Your Synergy SIS Account

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Setting Checklist Security	179
Synergy Accessibility	180

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

Menu Save Undo

User Name: **User, Admin** Login Name: **Admin**

Demographics Navigation Menu Security Access Spell Check Options POV

Login Password

Email: staffdemo@mail.qasynergyloca **Is Administrator** Password Confirm Password

Address Preferences

Address City State Zip Code

Default Mode Edit

Paging Size Paging Row Size

Show Quick Launch

POV Home Page [Change POV Home Page](#)

Phone Numbers Add

×	Line	Primary	Type	Phone	Extension	Contact	Listed
---	------	---------	------	-------	-----------	---------	--------

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.

The screenshot shows the 'User Profile' application window. At the top, it displays 'User Name: User, Admin' and 'Login Name: Admin'. The 'Demographics' tab is selected and highlighted with a red box. Below the tabs are several sections: 'Login' with an email field (staffdemo@mail.qasyneryloca) and an 'Is Administrator' checkbox; 'Password' with 'Password' and 'Confirm Password' fields; 'Address' with fields for 'Address', 'City', 'State', and 'Zip Code'; 'Preferences' with a 'Default Mode' dropdown (set to 'Edit'), 'Paging Size' and 'Paging Row Size' fields, a checked 'Show Quick Launch' checkbox, and a 'POV Home Page' field with a 'Change POV Home Page' button; and 'Phone Numbers' which contains a table with one entry.

×	Line	Primary	Type	Phone	Extension	Contact	Listed
	1	<input checked="" type="checkbox"/>	Cell	480-555-1234		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

User Profile Screen

Setting Preferences

This close-up shows the 'Preferences' section. It includes a 'Default Mode' dropdown menu currently set to 'Edit'. Below it are two input fields for 'Paging Size' and 'Paging Row Size'. There is a checked checkbox for 'Show Quick Launch'. At the bottom, there is a 'POV Home Page' field and a 'Change POV Home Page' button.

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.



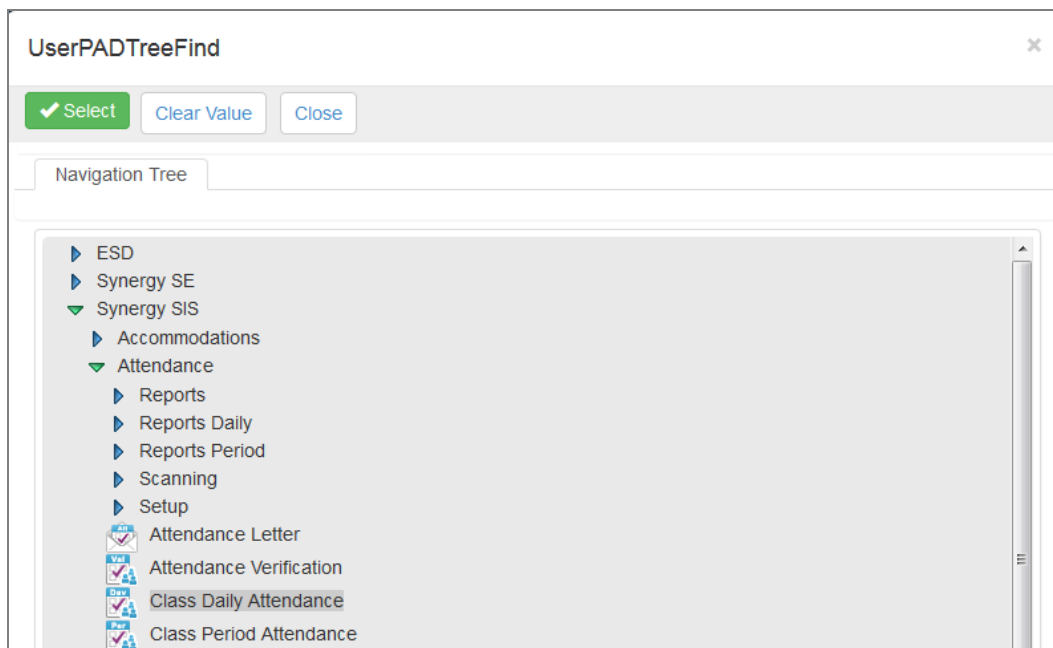
This may slow the search slightly as more records are returned.

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**.

Phone Numbers								...	+ Add
✕	Line	Primary	Type	Phone	Extension	Contact	Listed		
☐	1	<input checked="" type="checkbox"/>	Cell	480-555-1234		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

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

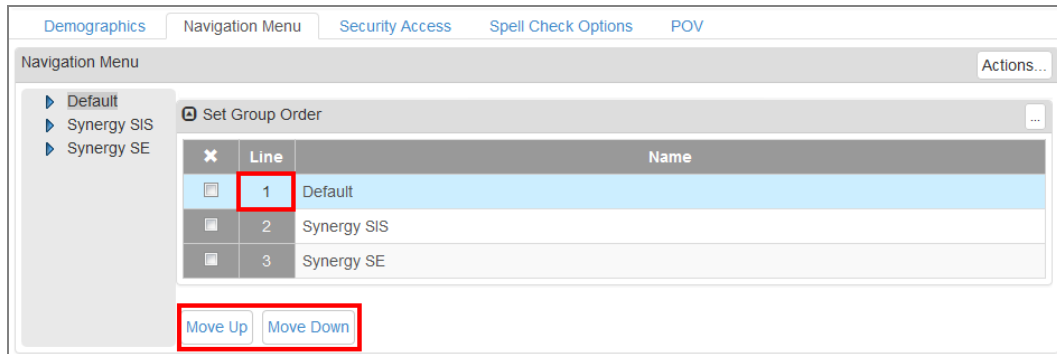
✓ Save ✕ Close

☑ Add Group Name

Name*

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

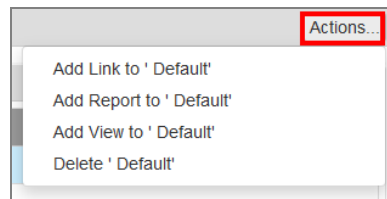
5. Repeat as needed.

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

Menu ▾
Save ✓
Undo ↶

User Name: **User, Admin** Login Name: **Admin**

Demographics
Navigation Menu
Security Access
Spell Check Options
POV

Focus

Focus Year Selection
2018-2019 ▾

Focus Organization
Kennedy High School

Show Inactive Students
Active Only ▾

Year Extensions

Possible Year Extensions

Night Regular Summer

Security Settings

Discipline Security
Highest ▾

Discipline Organization Security
View All - Disregard Organization Security ▾

Conference Visitation
Highest ▾

Allow Override of Max Students in Class
TeacherVUE Administrator
Yes ▾

Organization Year Access

Previous Year(s) Permission
Update ▾

Current Year Permission
Update ▾

Next Year(s) Permission
Update ▾

Organizations

Line	Organization Name	Organization Update
1	2. Middle Schools	Update
2	1. Elementary Schools	Update
3	5. Closed Schools	None
4	3. High Schools	Update
5	4. Special Schools	Update

User Groups

Line	User Group Name	Use Menu Group
1	Role - Admin	<input checked="" type="checkbox"/>
2	Update - District	<input checked="" type="checkbox"/>
3	Admin Testing	<input type="checkbox"/>
4	Dual Login	<input type="checkbox"/>

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 Menu Save Undo

User Name: **User, Admin** Login Name: **Admin**

Demographics Navigation Menu Security Access **Spell Check Options** POV

Options

<input checked="" type="checkbox"/> Ignore All-Capital Words	<input checked="" type="checkbox"/> Ignore Mixed-Digit Words	<input checked="" type="checkbox"/> Ignore Filenames
<input checked="" type="checkbox"/> Ignore First-Capital Words	<input checked="" type="checkbox"/> Ignore Hyphenated Words	<input checked="" type="checkbox"/> Ignore HTML Tags
<input checked="" type="checkbox"/> Ignore Mixed-Capital Words	<input checked="" type="checkbox"/> Ignore Repeat Words	<input checked="" type="checkbox"/> Ignore Internet Addresses

Custom Word List ... + Add

<input type="checkbox"/>	Line	Word
<input type="checkbox"/>	1	Edupoint

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**.


Custom Word List ... + Add

<input type="checkbox"/>	Line	Word
<input type="checkbox"/>	1	Edupoint

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.

Urgency	Organization Name	Announcement	Dismiss or Recall Message
Tasks			
		Description	Action
08/23/2017 5:15 PM	Online Registration	9 updates are pending review	✓
12/14/2017 7:38 PM	Zuniga, Kathleen	Electronic Student Data Response from: Other School District - Other High School	
12/26/2017 1:51 PM	Abbott, Billy C	Home and mail address were changed by Rob Wilson at Adams Elementary. Both home and mail new addresses: 1955 S Val Vista Dr, Mesa, AZ 85204 Please confirm and acknowledge the change by clicking the checkmark at the right.	✓

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.

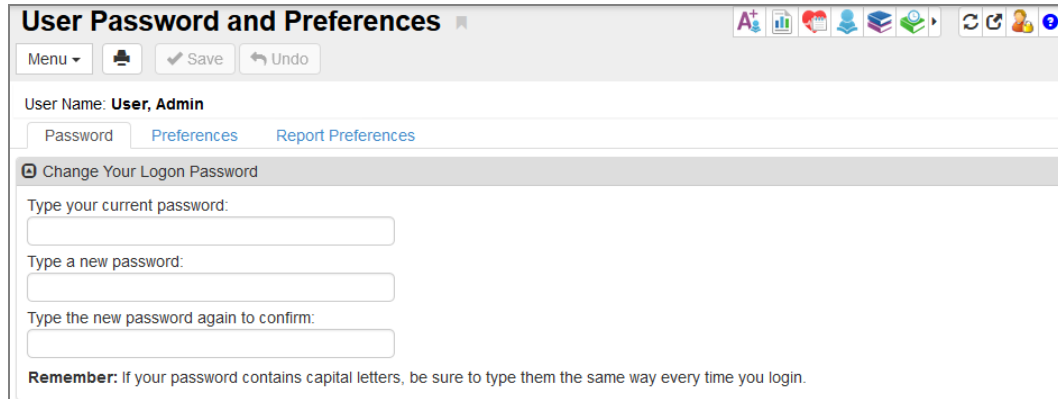
User Screen, POV Tab

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.



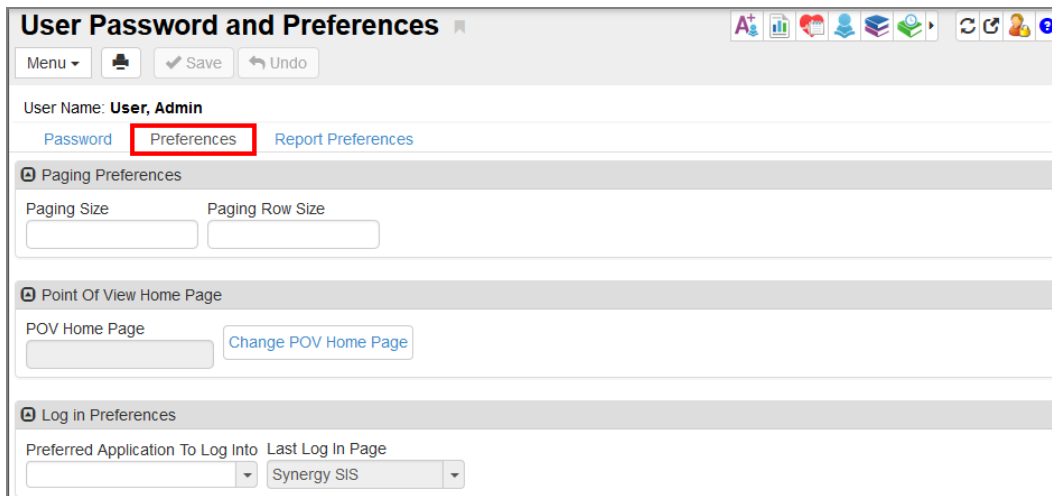
The screenshot shows the 'User Password and Preferences' interface. At the top, there is a title bar with 'User Password and Preferences' and a menu icon. Below the title bar, there are buttons for 'Menu', 'Save', and 'Undo'. The user name is displayed as 'User, Admin'. There are three tabs: 'Password', 'Preferences', and 'Report Preferences'. The 'Change Your Logon Password' section is active, containing three input fields: 'Type your current password:', 'Type a new password:', and 'Type the new password again to confirm:'. A 'Remember' note at the bottom states: 'Remember: If your password contains capital letters, be sure to type them the same way every time you login.'

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.



The screenshot shows the 'User Password and Preferences' interface with the 'Preferences' tab selected. The 'Paging Preferences' section has two input fields: 'Paging Size' and 'Paging Row Size'. The 'Point Of View Home Page' section has a 'POV Home Page' input field and a 'Change POV Home Page' button. The 'Log in Preferences' section has two dropdown menus: 'Preferred Application To Log Into' and 'Last Log In Page', with 'Synergy SIS' selected in the second dropdown.

User Password And Preferences Screen, Preferences Tab

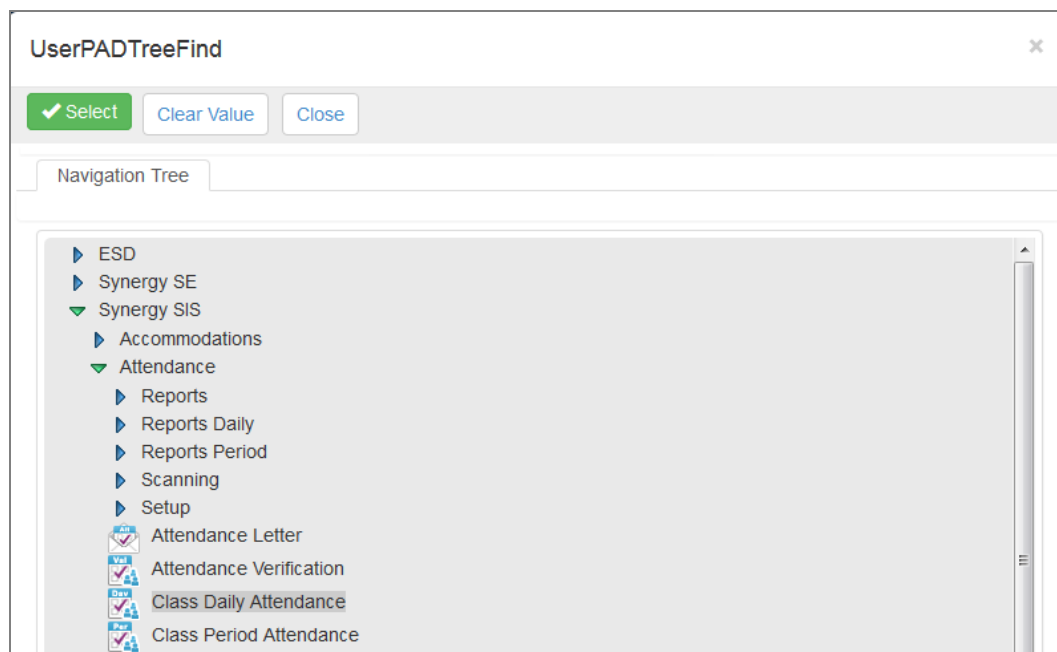
Changing the Number of Records Displayed on One Page

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.

The screenshot shows the 'User Password and Preferences' interface. At the top, there are tabs for 'Password', 'Preferences', and 'Report Preferences', with 'Report Preferences' being the active and highlighted tab. Below the tabs, there are two main sections: 'Student Profile' and 'Student Schedule'. The 'Student Profile' section includes checkboxes for 'Suppress Photo', 'Hide Health Conditions', 'Hide Parent Info', 'Hide Emergency Info', 'Hide Physician Info', 'Hide Signature Info', 'Include Health Condition History', and 'Show Homeroom Teacher'. The 'Student Schedule' section includes checkboxes for 'Hide All Personal Info', 'Hide Perm ID', and 'Full Schedule When Printed From Menu'. At the bottom of the 'Student Schedule' section, there is a 'Sort Options' dropdown menu.

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.

The screenshot shows a close-up of the 'Phone Number Options' and 'IDS801 Preferences' sections. In the 'Phone Number Options' section, the 'Mask Phone Numbers' dropdown menu is highlighted with a red box. In the 'IDS801 Preferences' section, the 'Use Custom Acknowledgement Text' checkbox is checked, and the text area below it, labeled 'Custom Acknowledgement Text:', is also highlighted with a red box.

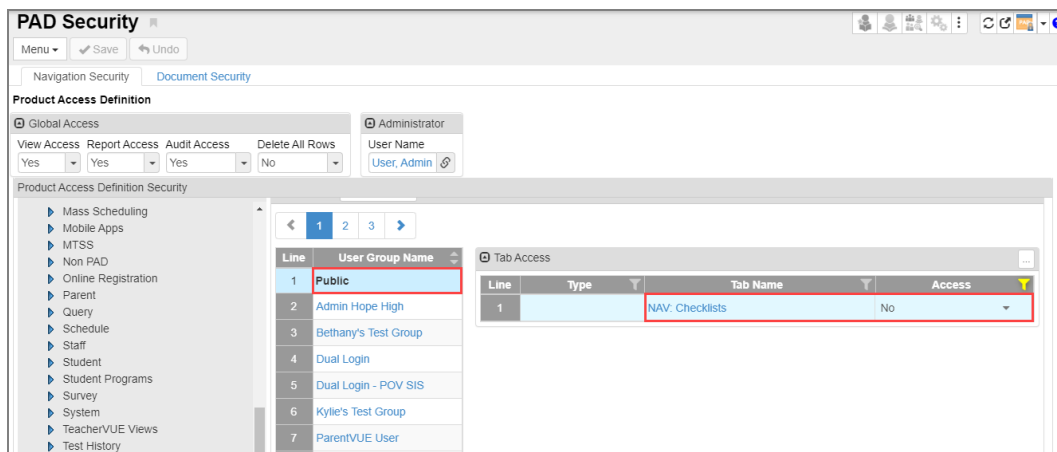
User Password And Preferences Screen, Report Preferences Tab

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

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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.

The screenshot shows the Synergy SIS Home Screen for an Admin User. The interface is organized into three columns:

- Left Column:**
 - Header: "Good Morning, Admin User"
 - Link: "Show Dismissed Messages"
 - Section: "Announcements" with a table:

Urgency	Organization Name	Announcement	Dismiss or Recall Message
 - Section: "Tasks" with a table:

	Description	Action
08/23/2017 5:15 PM	Online Registration 9 updates are pending review	✓
12/14/2017 7:38 PM	Zuniga, Kathleen Electronic Student Data Response from: Other School District - Other High School	
12/26/2017 1:51 PM	Abbott, Billy C Home and mail address were changed by Rob Wilson at Adams Elementary. Both home and mail new addresses: 1955 S Val Vista Dr, Mesa, AZ 85204 Please confirm and acknowledge the change by clicking the checkmark at the right.	✓
- Middle Column:**
 - Section: "Local Date/Time" showing "Tuesday, October 3, 2017" at "9:12:12 AM MST".
 - Section: "Weather: Fountain Valley, AZ" with a table:

Now	Today	Tonight	Tomorrow
65°	65°	63°	65°
	63°		60°
	67°		70°
 - Section: "Total Parent/Student Logins - 2 weeks" showing a grid of numbers:

2	2	4	3
2	1	2	3
3	2	1	1
5			
- Right Column:**
 - Section: "Top 10 process server jobs" showing a bar chart with values: 42, 30, 28, 26, 25, 21, 17, 17, 16, 14.

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.

The screenshot shows the Synergy Dashboard Configuration Screen. The interface includes:

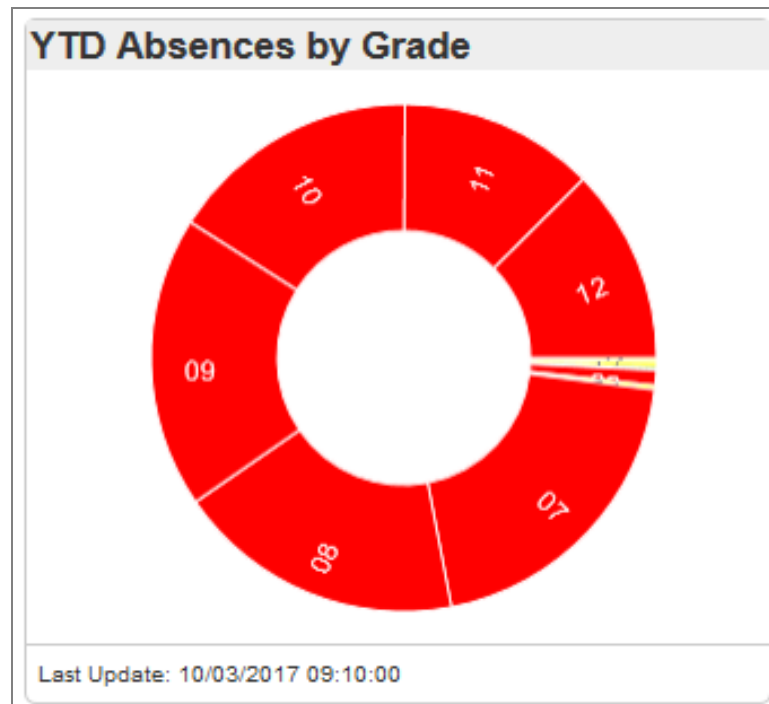
- Header: "Synergy Education Platform" and "Demo School District Excellence In Education".
- User: "Admin User (Show active and inactive) 2016-2017 Hope High School".
- Section: "Configuration" with toggle switches for "Show Tasks" (On) and "Show Announcements" (On).
- Section: "Choose the layout for this page:" with six layout options:
 - One Column
 - Two Columns
 - Wide Right
 - Wide Left
 - Three Columns
 - Four Columns

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.



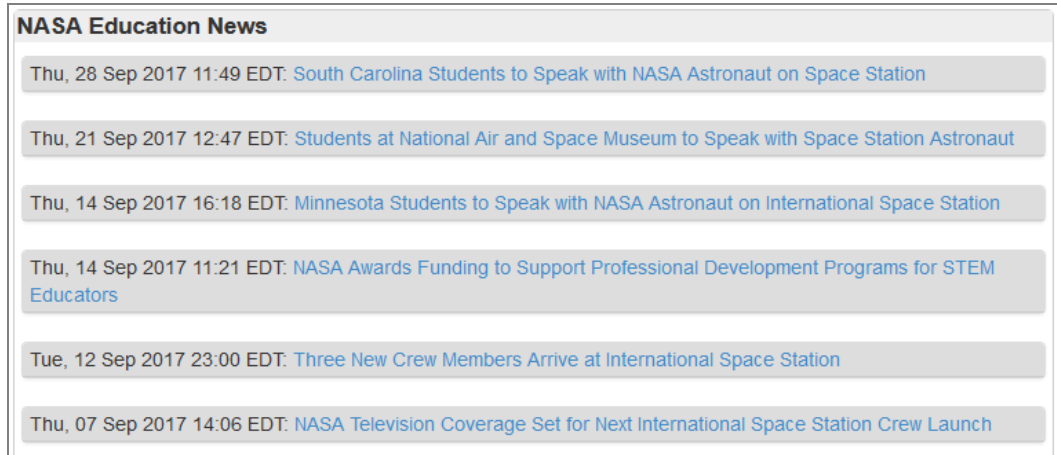
Query Widget, Doughnut Graph

- 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.



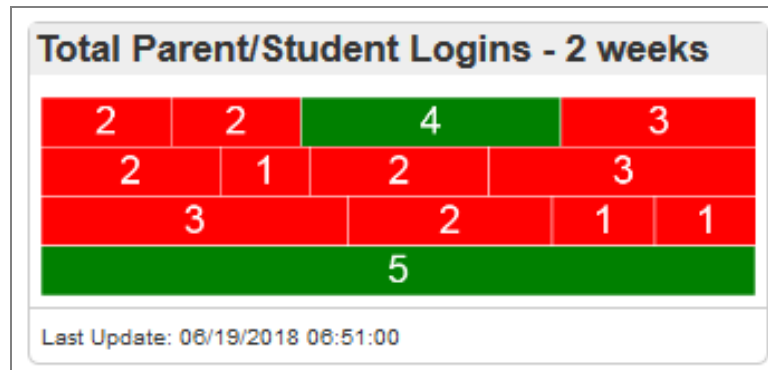
External Image Widget

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



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.



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.

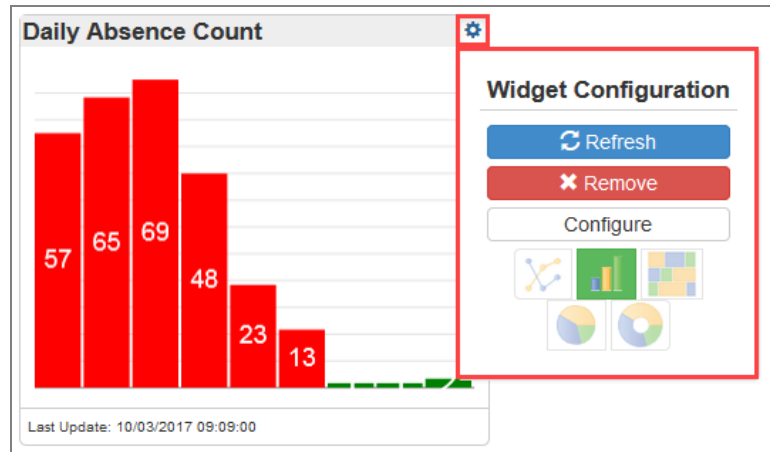
Synergy SIS Home Screen

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.



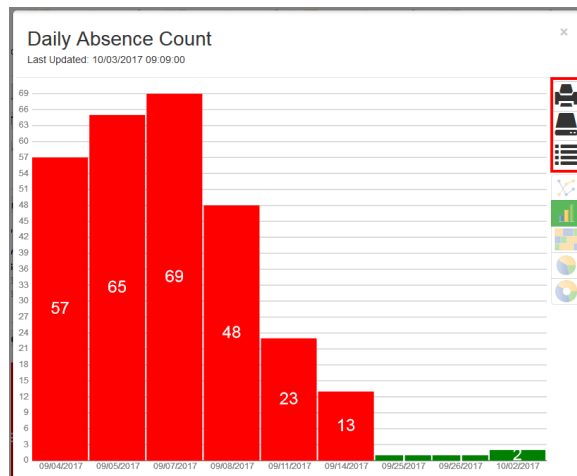
Widget Options

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.

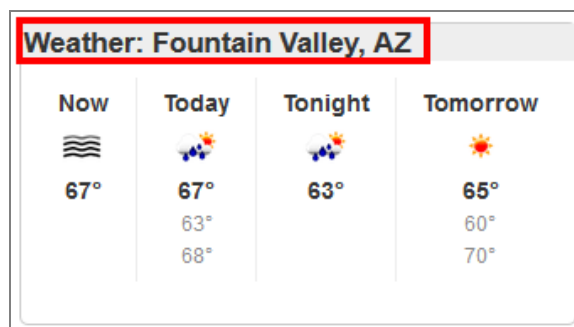
Dashboard Control Screen

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

Save Close

Options Advanced Rules

Name* Group* Widget Type Inactive Widget ID

Description

Title

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width:

Height (in pixels) Width (in pixels)

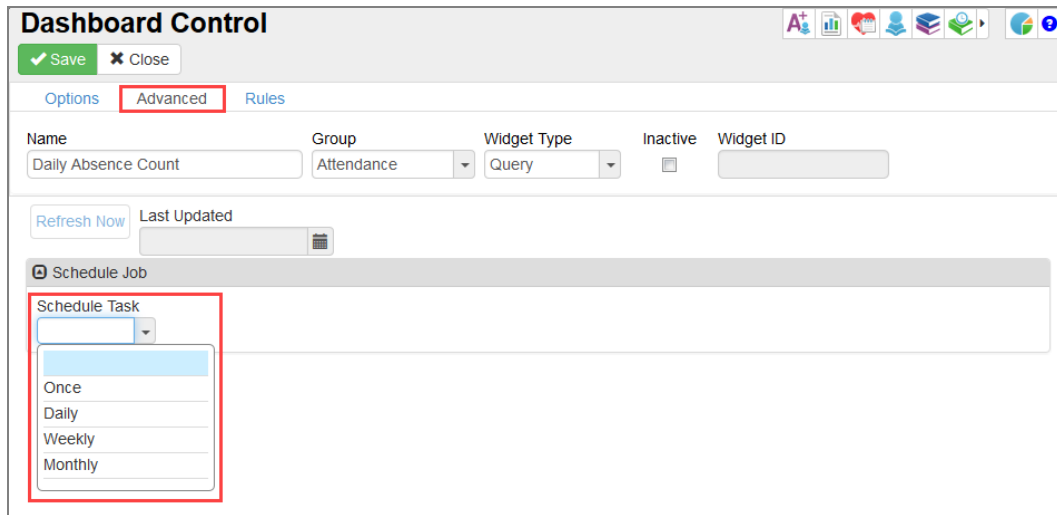
Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

800 600

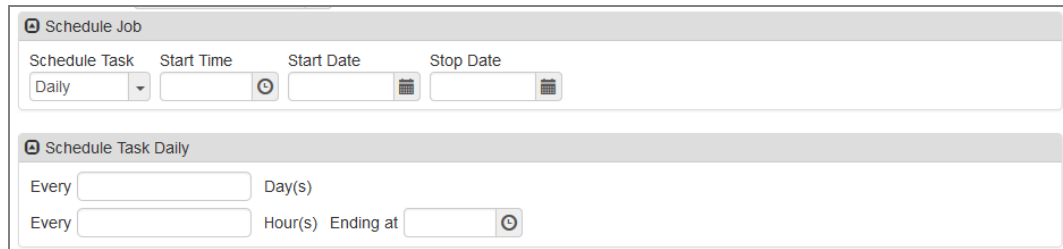
Dashboard Control Add Screen

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.




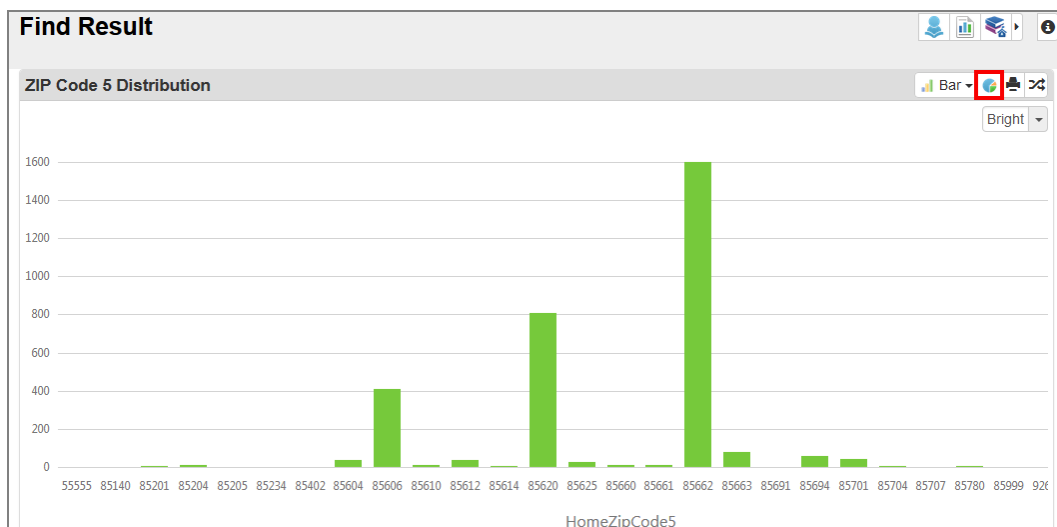
The following example uses the **Zip Code** field on the **Synergy SIS > Student > Student**.

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.

The screenshot shows the 'Student' screen in Synergy SIS. The 'Home Address' section is expanded, showing fields for Address, Effective Date, City, State, and ZIP Code. A red box highlights the 'Graph' icon (a bar chart) over the ZIP Code field. Other icons like 'Validate' and 'Mail same as Home Address' are also visible.

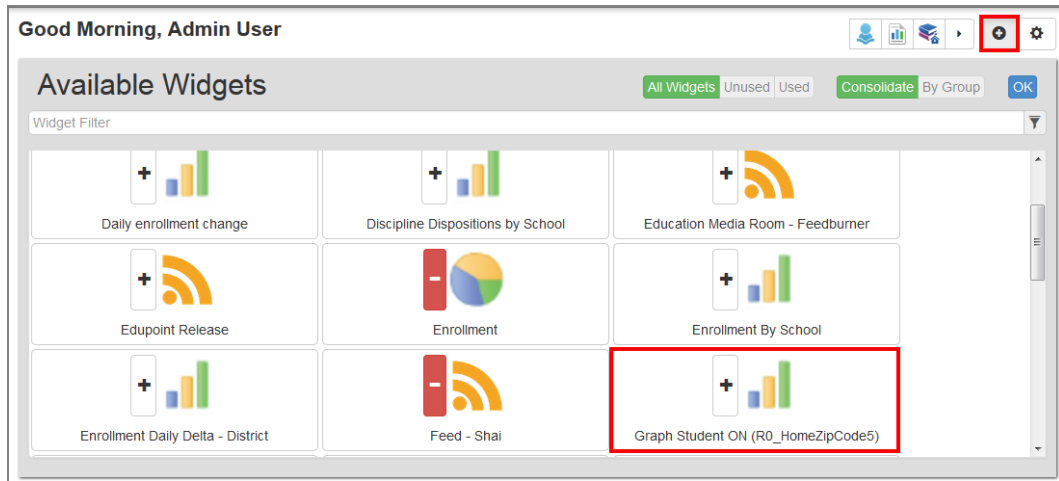
Student Screen

4. Click  in the top right to save the icon to Dashboard Control. The Dashboard Control screen opens.



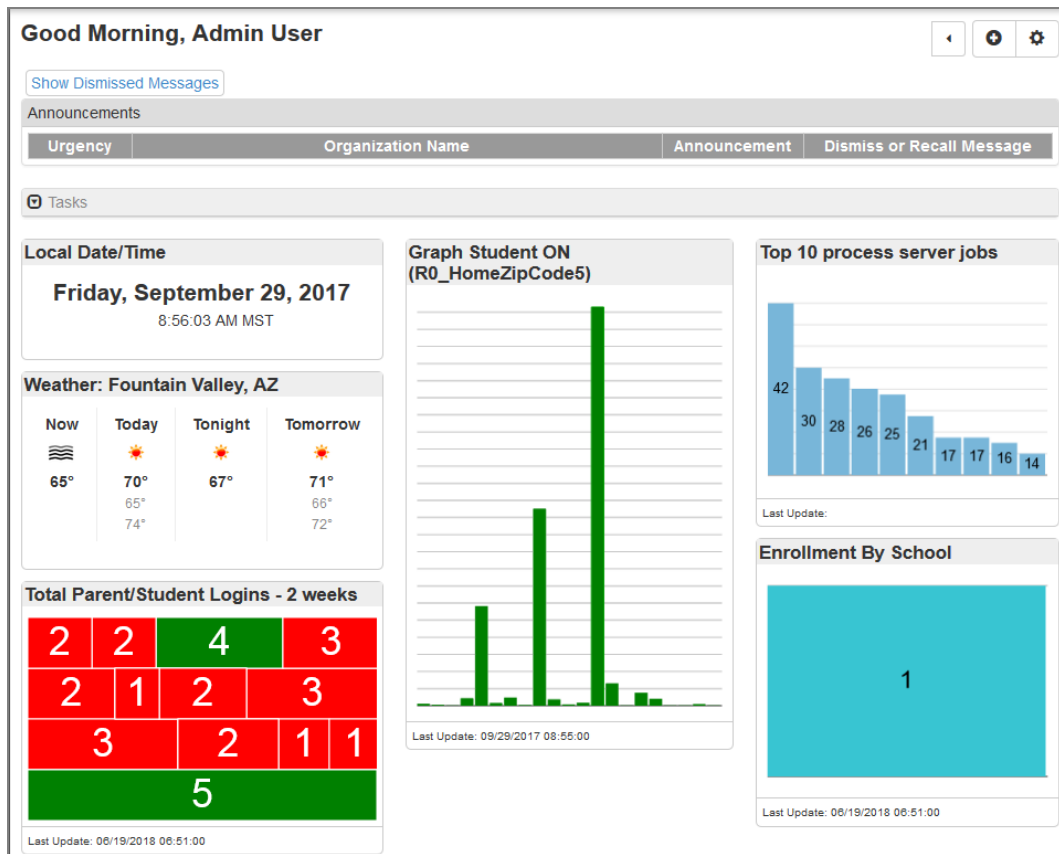
Find Result Screen

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.

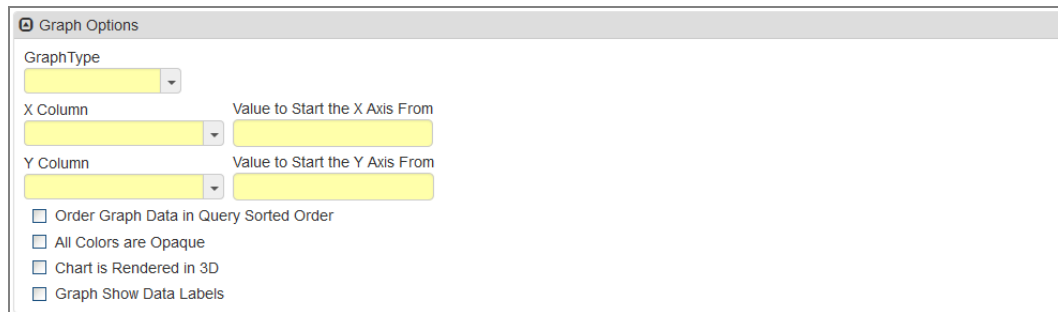
2. Follow the instructions outlined in [Creating Widgets](#) – selecting *Query* as the **Widget Type**.
3. Select a focus for the query.
 - Select a **Specific Organization** and **Specific Year** as the focus of the public query by clicking on the search icon next to those fields. Locate the appropriate 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

The screenshot shows a 'Specific Focus' section with two search fields: 'Specific Organization' and 'Specific Year', both with search icons. Below is a 'Query' section with a search field for 'Public query providing data for dashboard control' and a 'Focus Based' checkbox. At the bottom, there are three unchecked checkboxes: 'Do not allow user to open query', 'Do not allow user to print report', and 'Do not allow user to open query detail'.

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

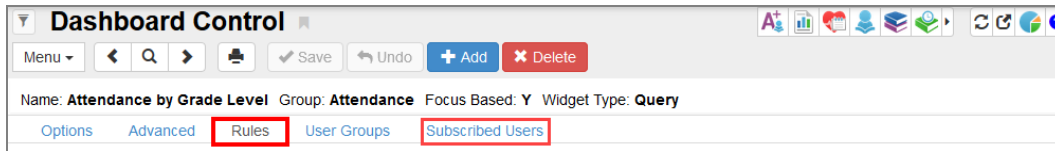
12. Click **Save**.

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

Name: **Attendance by Grade Level** Group: **Attendance** Focus Based: **Y** Widget Type: **Query**

Options Advanced **Rules** User Groups Subscribed Users

Name: Attendance by Grade Level Group: Attendance Widget Type: Query Inactive: Widget ID: 16

Graph Creation Rules

×	Line	Condition Order	Condition	Condition Value	Color
<input type="checkbox"/>	1	1	Greater or Equal	80	Red
<input type="checkbox"/>	2	2	Greater or Equal	70	Orange
<input type="checkbox"/>	3	3	Greater or Equal	60	Yellow
<input type="checkbox"/>	4	4	Greater or Equal	0	Green

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**.

External Image

External URL Path
http://www.azcentral.com/weather/wsi_images/RAD_PHX_STILL.SGI.gif

External Image Click URL
http://www.azcentral.com/weather/articles/rimage.html

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**.



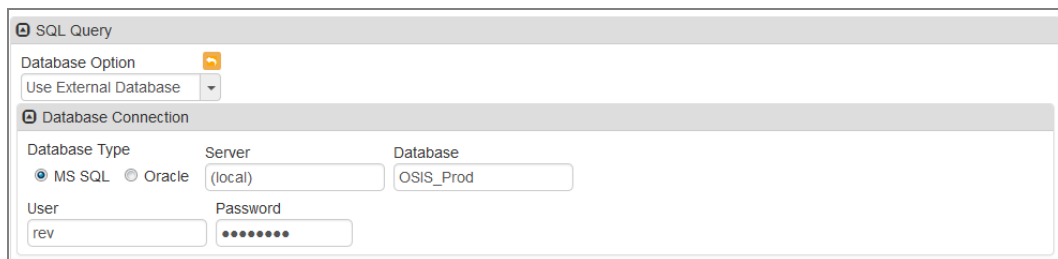
Dashboard Control Screen

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.

SQL Query

Database Option

Focus Based

No Launch Detail

SQL Command

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = @FOCUS_YEAR_GU
set @startDt = DateAdd (Month, -1, getDate())
```

The following will be added as parameters in the SQL execution at runtime:

- @DATE = Current date (e.g. 9/15/2008)
- @FOCUS_YEAR = Focus year for user (e.g. 2008)
- @FOCUS_YEAR_GU = Focus year guid for user (e.g. {GUID})
- @FOCUS_ORGANIZATION = Focus organization name for user (e.g. Hope HS)
- @FOCUS_ORGANIZATION_GU = Focus organization guid for user (e.g. {GUID})
- @FOCUS_ORG_YEAR_GU = Focus organization year guid for user (e.g. {GUID})
- @USER_GU = User guid for current user (e.g. {GUID})

NOTE: Parameter names must appear exactly as listed above (capitalization included).

Dashboard Control Screen

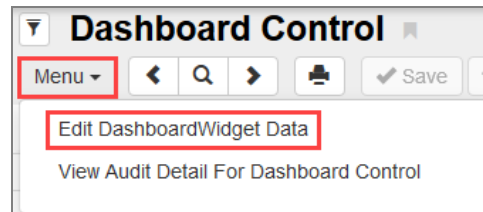
6. Select **Order Graph Data in SQL Sorted Order** in the Graph Options section to sort the data in the graph by the same sort order detailed in the query.
7. Click **Save**.

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.

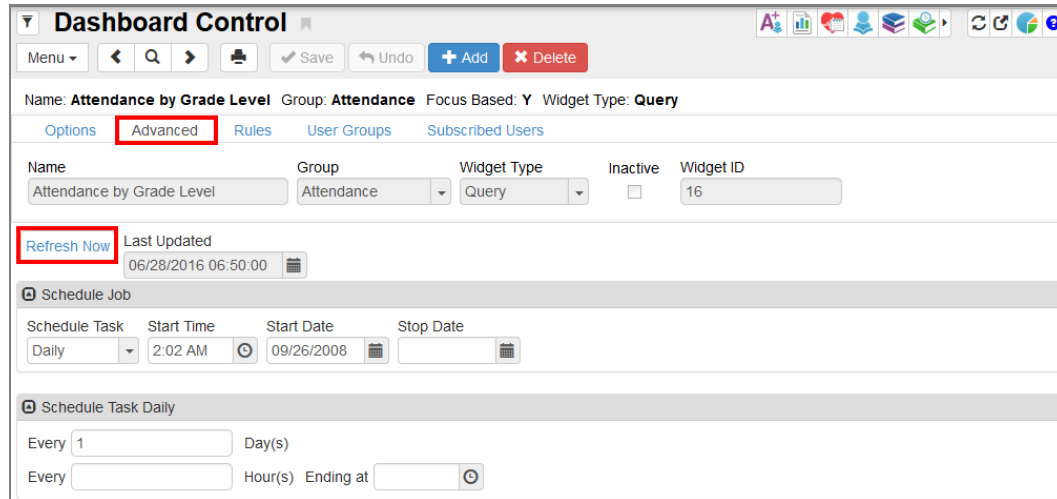


Selecting **Inactive** removes a widget from current or future use but does not delete it.

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

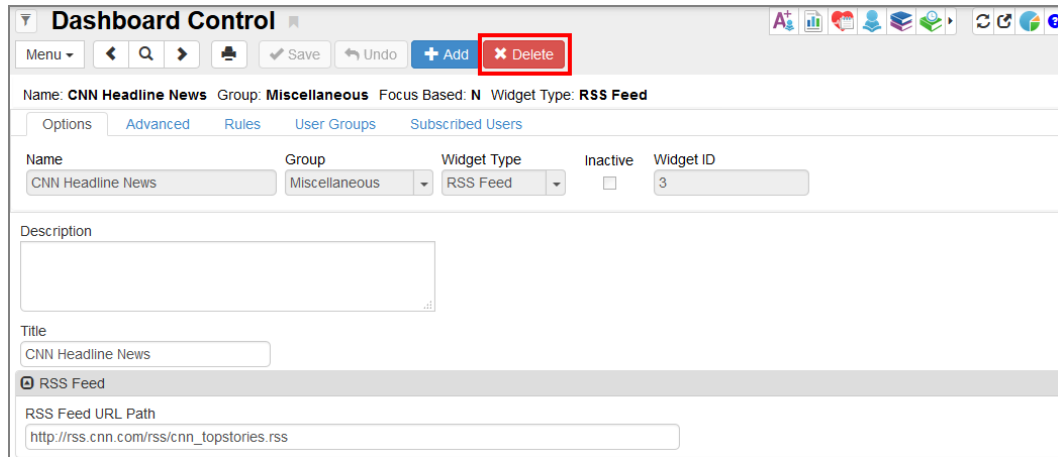
A new window opens when the refresh process completes displaying the results of the refresh and the users' updated home screens.



Job Details Window

Deleting a Dashboard Widget

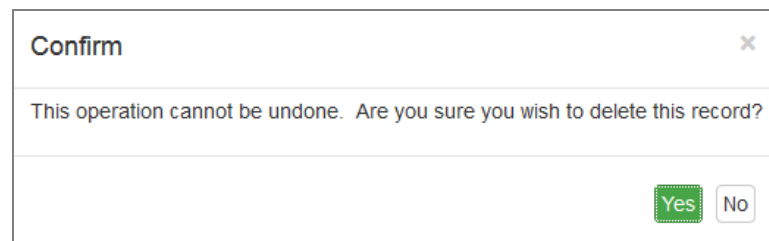
1. Find or scroll to the appropriate widget on the Dashboard Control screen.
2. Click **Delete**.



The screenshot shows the 'Dashboard Control' interface. At the top, there is a toolbar with a 'Delete' button highlighted in red. Below the toolbar, the widget configuration is displayed for 'CNN Headline News'. The configuration includes fields for Name, Group (Miscellaneous), Widget Type (RSS Feed), Inactive (checkbox), and Widget ID (3). There is also a Description field, a Title field (CNN Headline News), and an RSS Feed URL Path field (http://rss.cnn.com/rss/cnn_topstories.rss).

Dashboard Control Screen

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




The screenshot shows a confirmation dialog box titled 'Confirm'. The message inside reads: 'This operation cannot be undone. Are you sure you wish to delete this record?'. At the bottom right, there are two buttons: 'Yes' (highlighted in green) and 'No'.

Confirmation Message

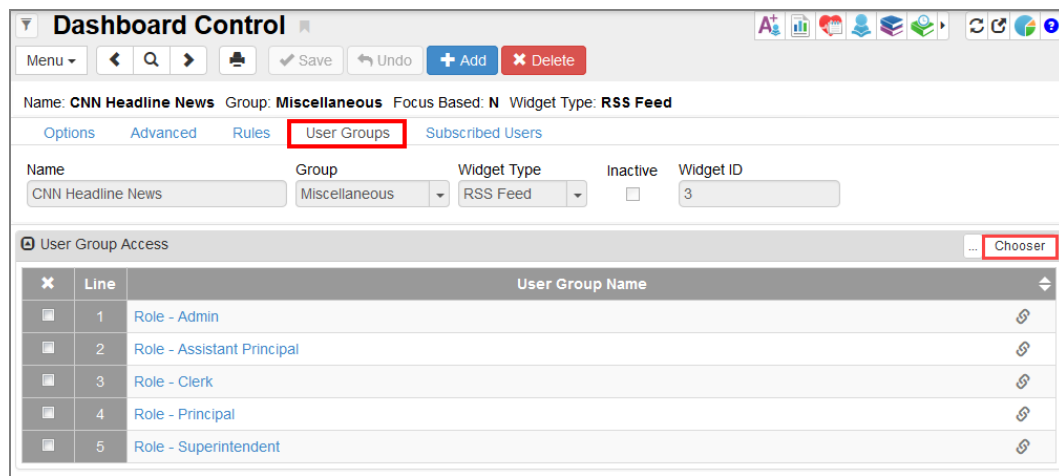
Adding or Removing Users

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.

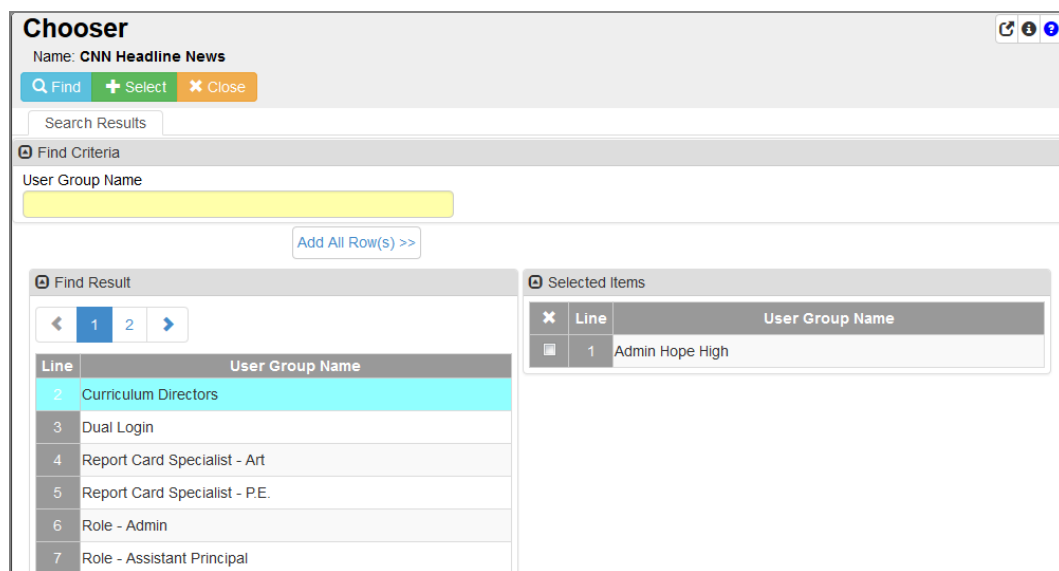
Adding a User Group to a Widget

1. Select the **User Groups** tab.
2. Click **Chooser**.



Dashboard Control Screen, User Groups Tab

3. Locate the appropriate user group or groups.

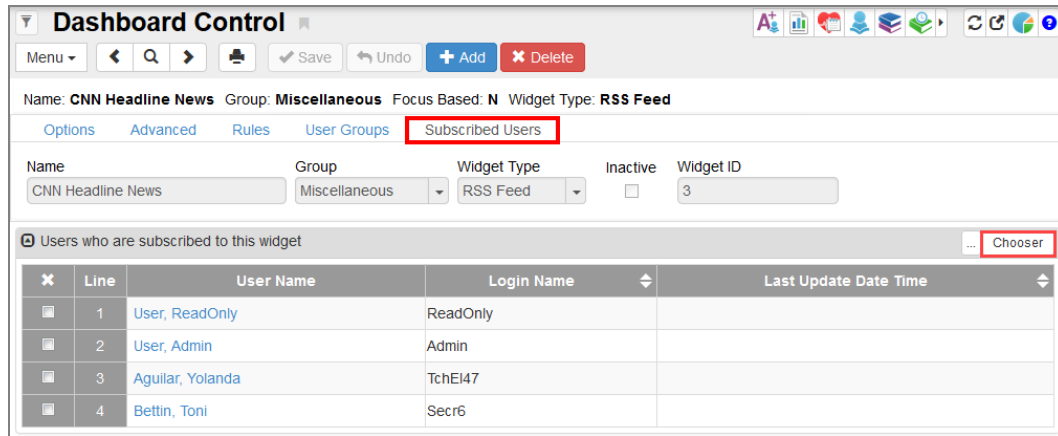


Chooser Screen

4. Click **Save**.

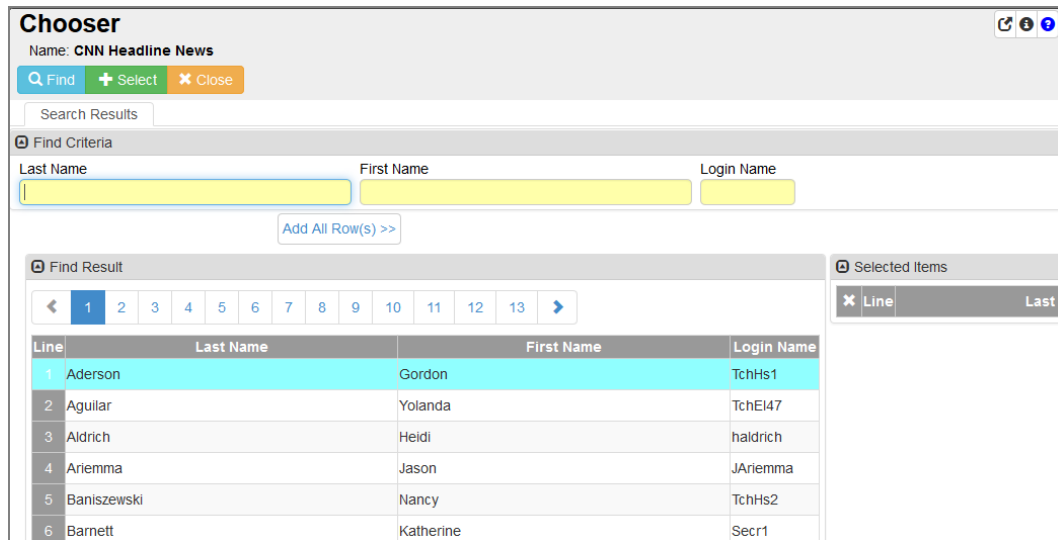
Adding Subscribed Users

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.

The screenshot shows the 'Dashboard Control' interface. At the top, there's a title bar with 'Dashboard Control' and a search icon. Below that is a menu bar with 'Menu', navigation arrows, 'Save', 'Undo', '+ Add', and 'Delete'. The main content area is titled 'Name: Attendance by Grade Level' and includes fields for 'Group: Attendance', 'Focus Based: Y', and 'Widget Type: Query'. There are tabs for 'Options', 'Advanced', 'Rules', 'User Groups', and 'Subscribed Users'. The 'Options' tab is active, showing a table with columns: Name, Group, Widget Type, Inactive, and Widget ID. The row shows 'Attendance by Grade Level', 'Attendance', 'Query', an unchecked 'Inactive' checkbox, and '16'. Below the table are sections for 'Query' and 'Graph Options'. The 'Query' section has a dropdown for 'Attendance List' and a 'Focus Based' checkbox checked. There are three unchecked checkboxes: 'Do not allow user to open query', 'Do not allow user to print report', and 'Do not allow user to open query detail'. The 'Graph Options' section has a 'Graph Type' dropdown set to 'Doughnut'. It has 'X Column' set to 'R1.Grade' and 'Y Column' set to an empty dropdown. There are two empty text boxes for 'Value to Start the X Axis From' and 'Value to Start the Y Axis From'. There are four checked checkboxes: 'Order Graph Data in Query Sorted Order', 'All Colors are Opaque', 'Chart is Rendered in 3D', and 'Graph Show Data Labels'.

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

Menu < > Save Undo + Add X Delete

Name: **Daily Absence Count** Group: **Attendance** Focus Based: **Y** Widget Type: **Query**

Options Advanced Rules User Groups Subscribed Users

Name: Group: Widget Type: Inactive: Widget ID:

Query

Public query providing data for dashboard control **Focus Based**

Do not allow user to open query
 Do not allow user to print report
 Do not allow user to open query detail

Graph Options

Graph Type:

X Column: Value to Start the X Axis From:

Y Column: Value to Start the Y Axis From:

Order Graph Data in Query Sorted Order
 All Colors are Opaque
 Chart is Rendered in 3D
 Graph Show Data Labels

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:

The screenshot shows the 'Dashboard Control' interface. At the top, there's a menu bar with 'Menu', navigation arrows, 'Save', 'Undo', 'Add', and 'Delete' buttons. Below that, the widget name 'Daily Absence Count' is shown, along with 'Group: Attendance', 'Focus Based: Y', and 'Widget Type: Query'. There are tabs for 'Options', 'Advanced', 'Rules' (which is highlighted with a red box), 'User Groups', and 'Subscribed Users'. Under the 'Rules' tab, there are fields for 'Name' (Daily Absence Count), 'Group' (Attendance), 'Widget Type' (Query), 'Inactive' (checkbox), and 'Widget ID' (13). Below this is a section for 'Graph Creation Rules' with a table containing three rows of rules.

X	Line	Condition Order	Condition	Condition Value	Color
	1	1	Greater or Equal	10	Red
	2	2	Greater or Equal	3	Yellow
	3	3	Greater or Equal	0	Green

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:

Graph Options

GraphType
Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (XYZ Column), the graph title based on column descriptions (XYZ Column Description) and (if you are using aggregation; e.g. Count, Sum, etc.) the column that represents the aggregated value (XYZ Column Aggregation).

X Column: TDAY X Column Description: Day X Column Aggregation: ENRCNT Value to Start the X Axis From: 0

Order Graph Data in SQL Sorted Order
 All Colors are Opaque
 Chart is Rendered in 3D
 Graph Show Data Labels

Dashboard Control Screen

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

Dashboard Control

Menu Save Undo Add Delete

Name: Enrollment by Day Group: Attendance Focus Based: Y Widget Type: SQL Query

Options Advanced **Rules** User Groups Subscribed Users

Name: Enrollment by Day Group: Attendance Widget Type: SQL Query Inactive: Widget ID: 12

Graph Creation Rules

X	Line	Condition Order	Condition	Condition Value	Color
<input type="checkbox"/>	1	1	Decrease from prior raw value	5	Red
<input type="checkbox"/>	2	2	Decrease from prior raw value	2	Orange
<input type="checkbox"/>	3	3	Decrease from prior raw value	1	Yellow
<input type="checkbox"/>	4	4	Increase from prior raw value	1	Green
<input type="checkbox"/>	5	5	Greater or Equal	0	Gray

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:

Graph Options

GraphType
Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation; e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
WEEK	Week	ENRCNT	0

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

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:

Graph Options

GraphType
Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column: DAY
X Column Description: Day
X Column Aggregation: DELTA
Value to Start the X Axis From:

Order Graph Data in SQL Sorted Order
 All Colors are Opaque
 Chart is Rendered in 3D
 Graph Show Data Labels

Dashboard Control Screen

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

Dashboard Control

Name: Enrollment Daily Delta Group: Attendance Focus Based: Y Widget Type: SQL Query

Options Advanced **Rules** User Groups Subscribed Users

Name: Enrollment Daily Delta Group: Attendance Widget Type: SQL Query Inactive: Widget ID: 14

Graph Creation Rules

X	Line	Condition Order	Condition	Condition Value	Color
<input type="checkbox"/>	1	1	Less or Equal	-3	Red
<input type="checkbox"/>	2	2	<=	-1	Yellow
<input type="checkbox"/>	3	4	>=	0	Green

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:

Graph Options

GraphType
Bar

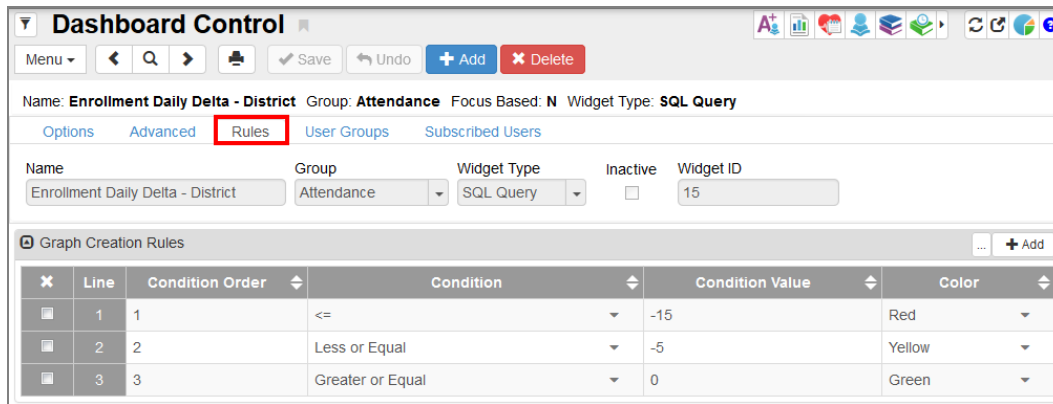
The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
DAY	Day	DELTA	

Order Graph Data in SQL Sorted Order
 All Colors are Opaque
 Chart is Rendered in 3D
 Graph Show Data Labels

Dashboard Control Screen

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



Dashboard Control

Name: **Enrollment Daily Delta - District** Group: **Attendance** Focus Based: **N** Widget Type: **SQL Query**

Options Advanced **Rules** User Groups Subscribed Users

Name: Enrollment Daily Delta - District Group: Attendance Widget Type: SQL Query Inactive: Widget ID: 15

Graph Creation Rules

Line	Condition Order	Condition	Condition Value	Color
1	1	<=	-15	Red
2	2	Less or Equal	-5	Yellow
3	3	Greater or Equal	0	Green

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:

Graph Options

GraphType
 Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation; e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
BD	Month	TOTAL	

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

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

Menu < > Save Undo + Add x Delete

Name: **Nasa - Kennedy Space Center C4** Group: **Miscellaneous** Focus Based: **N** Widget Type: **External Image**

Options Advanced Rules User Groups Subscribed Users

Name	Group	Widget Type	Inactive	Widget ID
Nasa - Kennedy Space Center C4	Miscellaneous	External Image	<input type="checkbox"/>	18

Description
 Kennedy Space Center photo image feed from channel 4

Title
 Kennedy Space Center - Channel 4

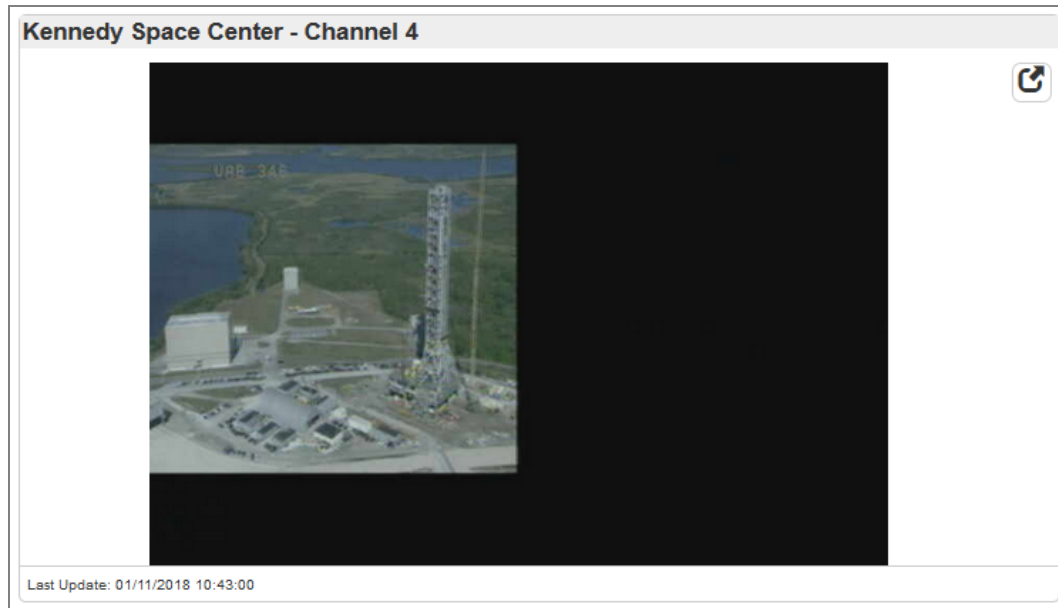
External Image

External URL Path

External Image Click URL

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

Name: **Weather - Pacific Northwest** Group: **Miscellaneous** Focus Based: **N** Widget Type: **External Image**

Options: **Advanced** Rules User Groups Subscribed Users

Name	Group	Widget Type	Inactive	Widget ID
Weather - Pacific Northwest	Miscellaneous	External Image	<input type="checkbox"/>	9

Description

Title: Pacific Northwest Weather

Dimensions

External Image

External URL Path: http://images.intellicast.com/WxImages/RadarLoop/rno_None_anim.gif

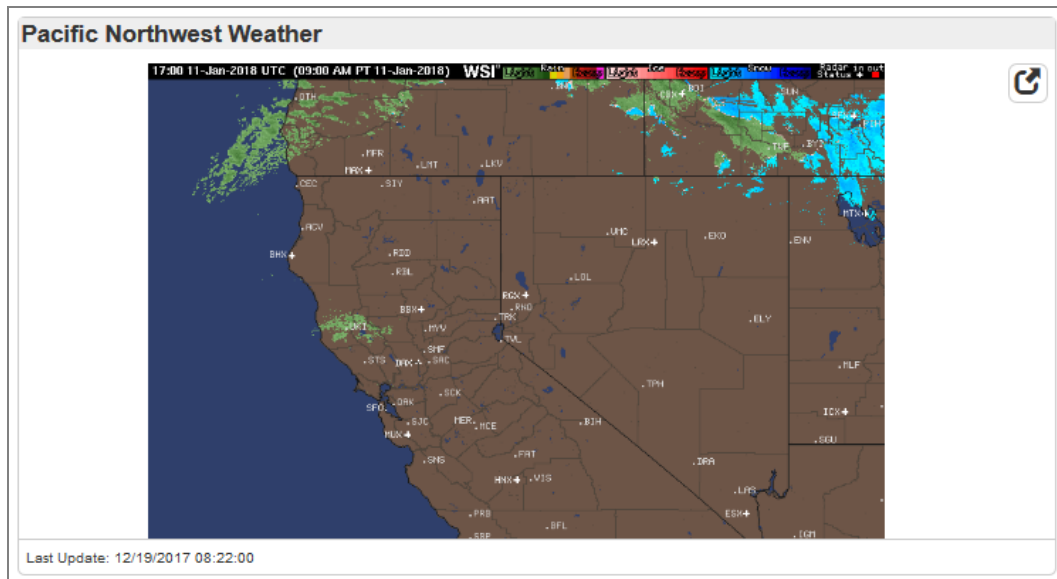
External Image Click URL: <http://www.intellicast.com/national/radar/current.aspx?location=USNV0076&animate=true>

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