Synergy SIS©

Query & Reporting Guide

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ABOUT THIS GUIDE

Document History

Date	Volume	Edition	Revision	Content
October 2009	1	1	1	Initial release of this document
April 2011	1	1	2	Updated to include changes in the November 2010 release
April 2013	1	1	3	Updated to include changes in the March 2013 release of Synergy 8.0.

CONVENTIONS USED IN THIS GUIDE

Bold Text

Bold Text - Indicates a button or menu or other text on the screen to click, or text to type.

Tip – Suggests advanced techniques or alternative ways of approaching the subject.

Note – Provides additional information or expands on the topic at hand.

Reference – Refers to another source of information, such as another manual or website

Caution – Warns of potential problems. Take special care when reading these sections.

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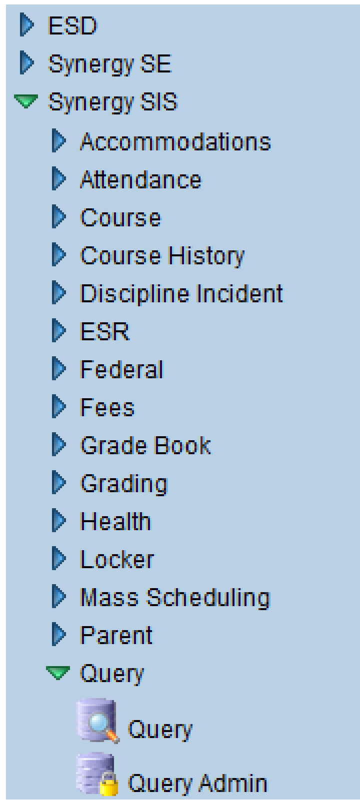
Navigation

To indicate how to find screens, this guide uses shorthand like **Synergy SIS > Query > Query**, which means: In the Navigation Tree (also called PAD Tree), click **Synergy SIS** (if necessary to open it), then **Query** (if necessary to open it), and then **Query**.



Synergy SIS Navigation Tree

If the Navigation Tree pane itself is not open, click the Tree button.

Tree Button

Before You Begin

Before using any of the Edupoint family of software products, please make sure the computer hardware and software meet the minimum requirements.

Caution: The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers and extra toolbars before logging in to any Edupoint product.

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Chapter One: OVERVIEW

In this chapter, the following topics are covered:

► Overview of querying and reporting

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OVERVIEW OF QUERYING & REPORTING

Synergy SIS offers numerous pre-defined reports that you can customize to some degree at the time of printing. Options that are specific to each report are described in the Synergy SIS guide for the subject matter of the report. Options that are common to all reports are described in this guide.

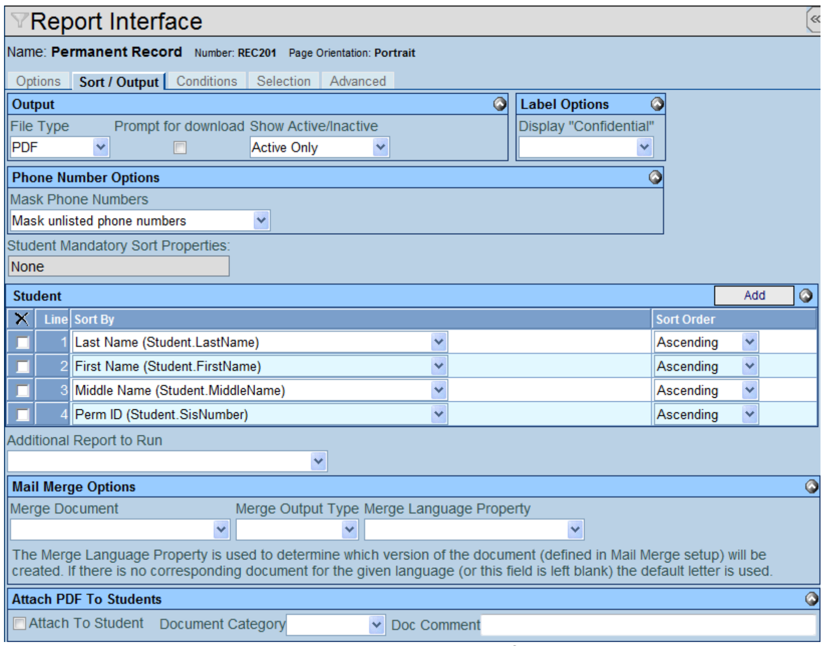

Figure 1.1 – Report Interface

In addition to pre-defined reports, Synergy SIS offers several ways to create custom reports. This guide shows how the Find mode function on each screen can act as a quick report writer. It also covers the **Query** screen and the types of reports it can create.

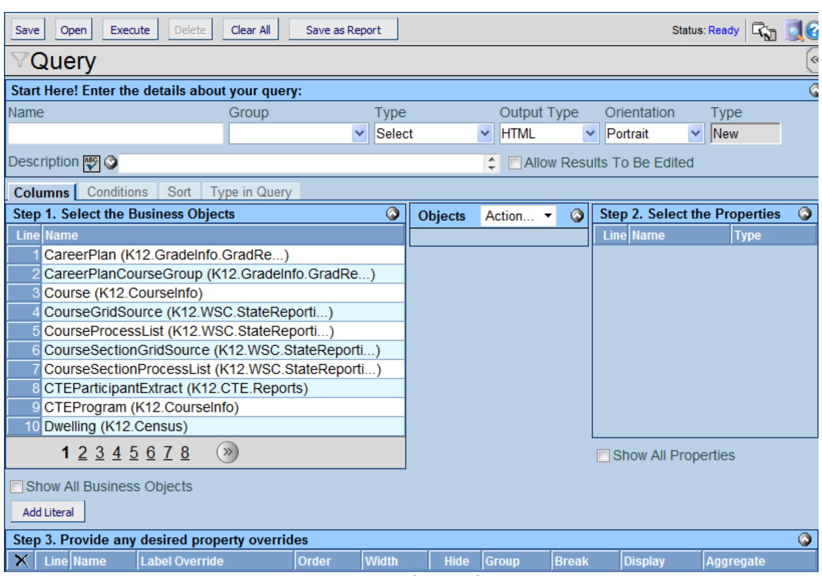

Figure 1.2 – Query Screen

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Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in the **Job Queue Viewer** and the **Job Q Adm Viewer**. The **Job Queue Viewer** lists all of the jobs that have been submitted by the user currently logged in to Synergy SIS. The **Job Q Adm Viewer** lists all jobs regardless of user. Both of these screens are covered in Chapter Six.

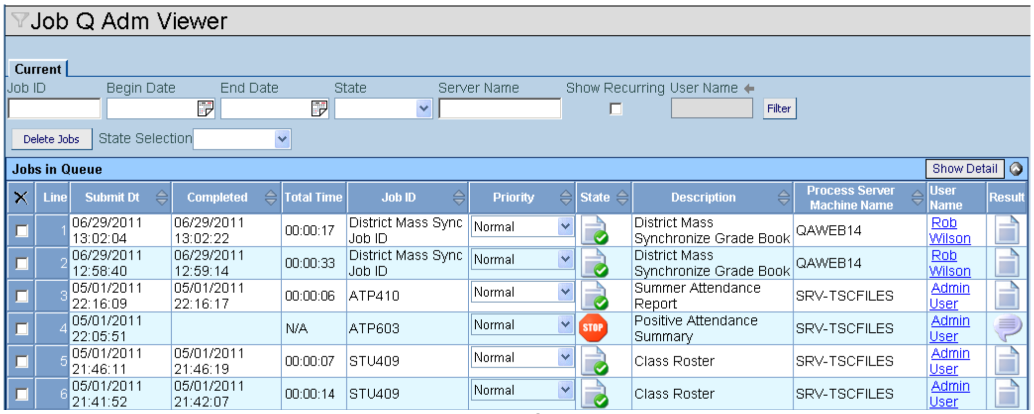

Figure 1.3 – Job Q Adm Viewer

Users who create queries that might be useful for other users can nominate those queries to be shared as public queries. The public queries can be managed and reviewed using the **Query Admin** screen explained in Chapter Six.

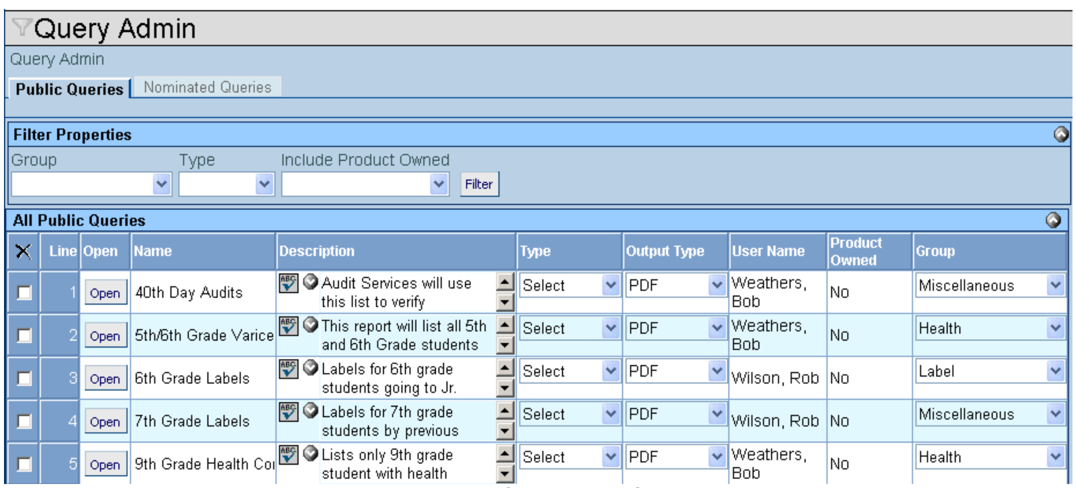

Figure 1.4 – Query Admin Screen

Users can create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Chapter Four of this guide). The structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree) can can be managed through the **UD PAD Definition** screen, as described in Chapter Six.

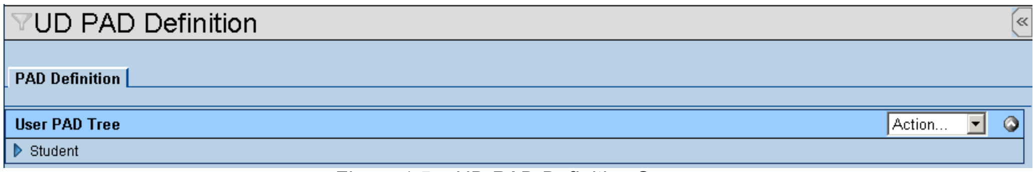

Figure 1.5 – UD PAD Definition Screen

This guide also reviews the reports available for the Job Queue and outlines the security options available for the **Job Queue Viewer**, the **Job Q Adm Viewer**, the **Query** screen, and the **Query Admin** screen.

Note: A user's ability to create and save a report is subject to the security restrictions set up by the district.

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Chapter Two: REPORTS

In this chapter, the following topics are covered:

- ► How to change a report's sort & output options
- ► How to filter a report
- ► How to schedule a report

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Synergy SIS offers numerous pre-defined reports that can be customized at the time of printing.

Almost every report has a set of options that are specific to that report. The report-specific options are listed on the **Options** tab of the **Report Interface**. Each of these report-specific options is outlined in the Synergy SIS guide relating to the report.

You can save the options selected as the default options for that report by clicking the **Save Default** button. This saves the selections on the **Options** tab only, and these options are specific to each school and to the user. To remove the saved default settings, click the **Reset Default** button.

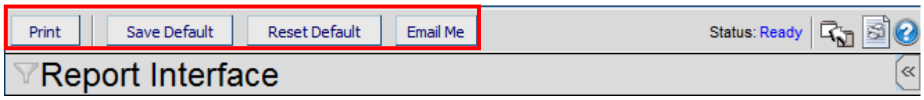

Figure 2.1 – Report Interface Screen

You can email the report to yourself with one click, with the **Email Me** button. This requires that Synergy SIS is configured to use the local email server. For instructions on how to configure email, see the *Synergy SIS – System Administrator Guide*.

When the **Print** button is clicked, the report is not actually sent to a printer. It is displayed on the screen as a PDF file. This PDF can then be sent to a printer or saved. When you click the **Print** button and Synergy SIS is creating the report, the **Job Status** screen opens.

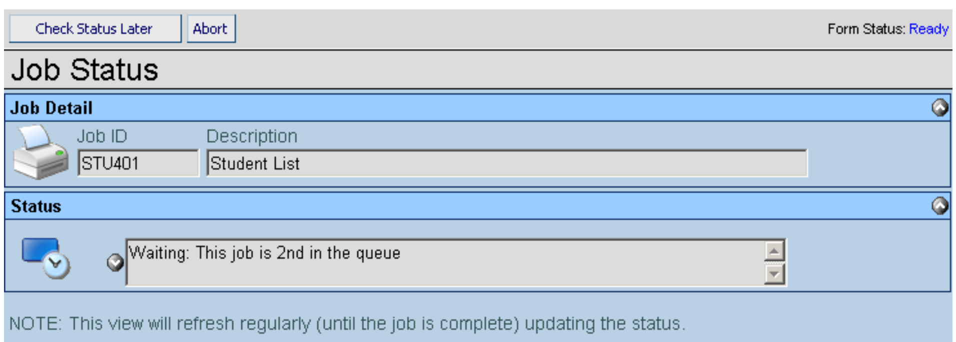

Figure 2.2 – Job Status Screen

You can cancel the report by clicking the **Abort** button. Clicking the **Check Status Later** button closes the **Job Status** screen, but the report and its results can still be viewed from the **Job Queue Viewer** screen. When the report is finished, the **Job Status** screen closes and the report opens in a PDF viewer. For more information about the **Job Queue Viewer**, see Chapter Six.

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SORT/OUTPUT OPTIONS

The options available on the **Sort/Output** tab of each report can change the order in which the data is sorted, and they can change the format of the printed report. Additional reports and mail merge documents may also be attached to the report to assist with mailings.

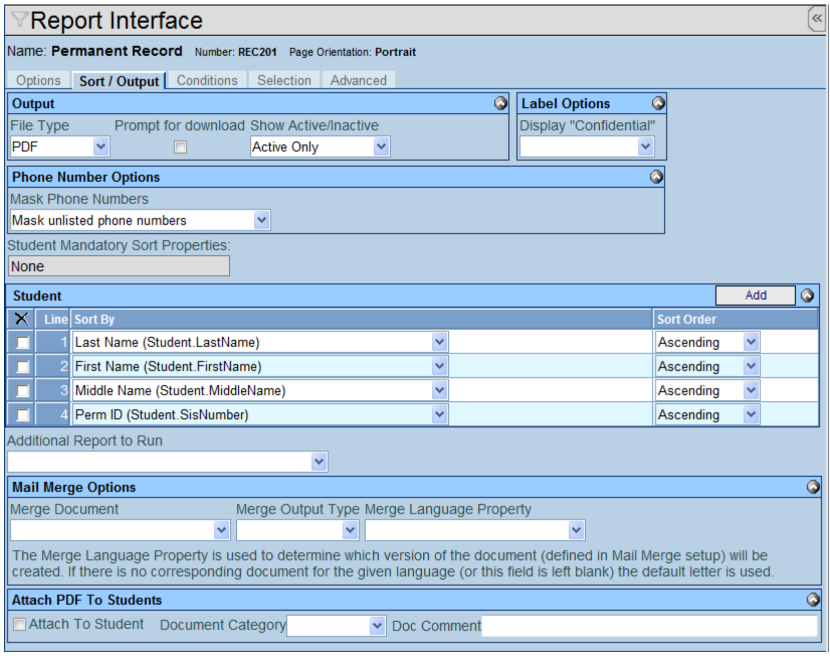

Figure 2.3 – Report Interface Screen, Sort/Output Tab

To customize the sort/output options:

1. The default file type for most reports is PDF, but reports can also be generated in the following formats by selecting them from the **File Type** list:
    - **TIFF Image** – a graphics file
    - **CSV** – a comma-separate values file
    - **Excel** – a Microsoft Excel version 1997-2003 format file
    - **HTML** – a web page in the standard Synergy SIS format
    - **Rich Text** – a document file (basically Microsoft Word format)
    - **Text File** – a plain text file with no formatting, in tab-delimited format
    - **XML** – an extensible markup language file

2. If **Prompt For Download** is checked, a prompt appears when the report is generated to either save or open the report.

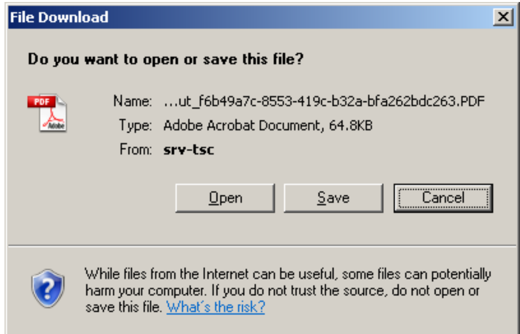

Figure 2.4 – Report Download Prompt

3. To display the word Confidential on the report, select where the Confidential label should appear on the report from the **Label Options** list. It can appear in the **Footer**, **Header**, or **Header & Footer**.

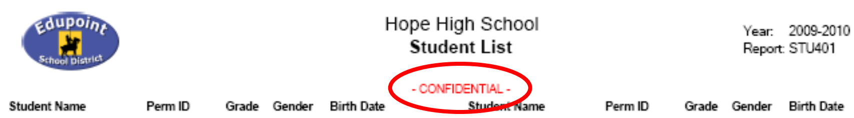

Figure 2.5 – Report Header, Confidential Label

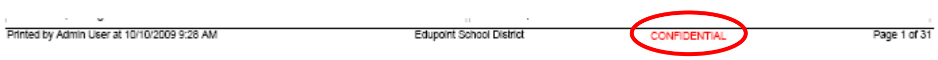

Figure 2.6 – Report Footer, Confidential Label

4. If the report has been set up with a mandatory primary sort, this sort is displayed **Student Mandatory Sort Properties** box and cannot be changed.

5. The default sort order is shown in the middle of the screen. The properties, or fields, listed are different for each report. The report is sorted by the order in which the properties are listed. For example, the report below is sorted first by the students' last names, then by their first names.

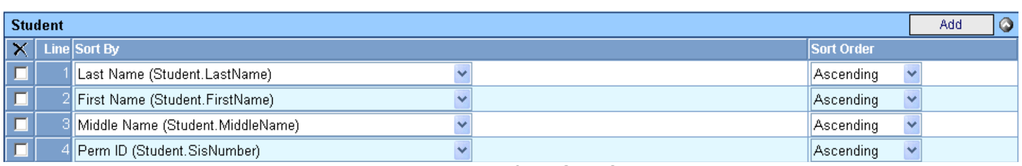

Figure 2.7 – Default Sort Order

6. To change an existing property, select the new property from the list in the **Sort By** column. The list of properties available for sorting is different for each report. The direction of the sort may also be changed by selecting it from the list in the **Sort Order** column. **Ascending** sorts from smallest to largest value, or from A to Z. **Descending** sorts from largest to smallest, or from Z to A.

7. To add a new property to be used to sort, click the **Add** button. Select the property to use in the **Sort By** column, and select the direction of the sort in the **Sort Order** column.

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8. For some reports, there is an option to select an **Additional Report To Run**. This report will run in conjunction with the primary report. The three additional reports available currently are STU424 – Student Oldest or Youngest, STU802 – Student Mailing Labels, and STU803 – Student Household Labels. The Student Oldest or Youngest report prints one mailing label per household with the information from either the oldest or youngest sibling. The Student Mailing Labels use the student's mailing address, and the Student Household Labels use the parent's mailing address. By running the labels in conjunction with the report, the labels are printed in exactly the same order as the report with exactly the same students. This makes it much easier to generate all the reports needed to complete a mailing.

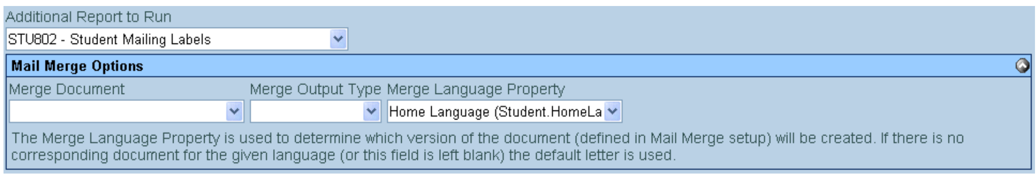

Figure 2.8 – Additional Report To Run/Mail Merge Options

9. A mail merge letter may also be generated in conjunction with the report. As with the labels, this makes a mailing much easier to coordinate. To create a mail merge letter to be used, please refer to the instructions on creating mail merge letters in the *Synergy SIS – System Administrator Guide*. Once a letter has been created, select the letter from the **Merge Document** list.

10. Select the type of document to print from the **Merge Output Type** list. The merged document can be printed as either a **Word Doc** or **PDF**.

11. Select the language in which the document should be printed from the **Merge Language Property** list. The language currently defaults to the **Home Language** of the student (as entered into the Student screen). When the merge document is printed, it looks up the language of the student and then looks to see if there is a mail merge letter saved in that language. If a mail merge letter is not available in the student's language, the default language (generally English) is used.

12. To attach a PDF of the report to a student's record, check the **Attach To Student** box, select a **Document Category**, and enter a **Document Comment** if desired. After the report is run, you can find it on the **Documents** tab of **Synergy SIS > Student > Student**.

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FILTERING A REPORT

Filtering a report limits the information included on the report to the records that match the filter, or condition. Most of the common criteria used to filter a report are listed on the **Options**. To filter a report separately from the options available on the **Options** tab:

1. Click the **Conditions** tab.

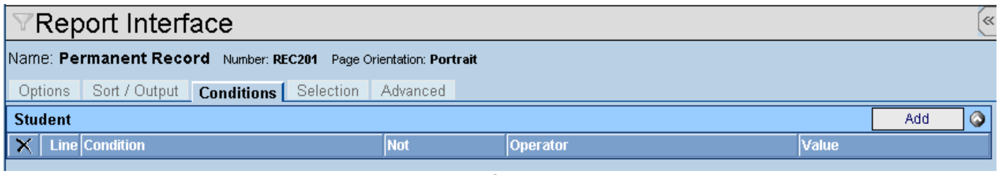

Figure 2.9 - Conditions Tab

2. Click the **Add** button to add a filter, and a new line is added to create a new condition. A condition is like a mathematical formula. It looks at each record to be included in the report, and compares it to the condition. If it matches the condition, it is included in the report. A condition has three main parts: which property in the report to examine, the mathematical operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

   Property = Value or Property ≠ Value

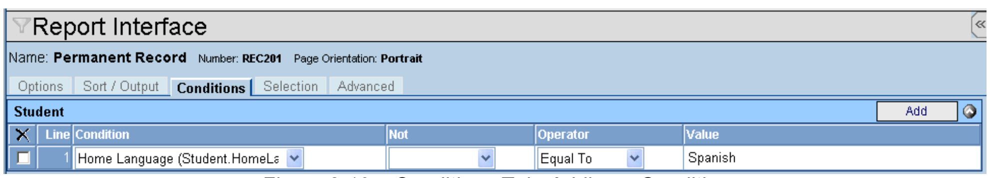

Figure 2.10 – Conditions Tab, Adding a Condition

3. Select the property to be used for the filter from the **Condition** list. The list of properties available is different for each report. The properties are generally items from the primary table of the report. For example, a report about students lists student properties such as the student's language, birth date, and city. A report about sections lists section properties such as section ID, course title, and room number.

   The name of the table from which the property is taken is listed in parenthesis after the name of the property. This is helpful when selecting properties that have the same name in more than one table. For example, Phone is used both in the physician records and student records.

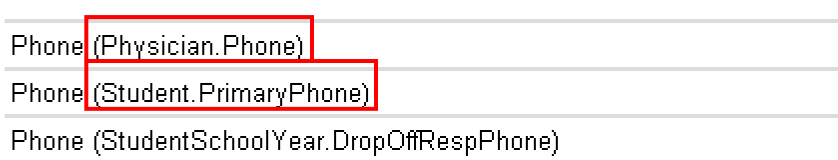

Figure 2.11 – Property List

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4. Set the operation by using the **Not** and **Operator** columns together. For example, if the **Operator** is **Equal To** and **Not** is selected, the operation is **Not Equal To**. The Operator can be set to one of the following:

   - **Contains** – the property selected must contain the value entered. For example, if **Email** is selected as the property and the value entered is yahoo, the report lists all students with an email address that contains the letters *yahoo* (billy@yahoo.com, melissa@yahoo.com). If **Not** is added, the report lists all email address that do not contain *yahoo* (george@gmail.com, sandra@hotmail.com).
   - **Equal To** – the property selected must be exactly the same as the value entered. For example, if **Home Language** is selected as the property and the value entered is **English**, the report lists all students whose home language is English. If **Not** is added, it lists all students whose home language is not English.
   - **Ends With** – the property selected must end with the value entered. For example, if section IDs were created with the Course and Period option and 01 is entered as the value for the section ID property in a report, the report lists all sections for period 01.
   - **Greater or Equal** – the property selected must be greater than or equal to the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2014 or later. If **Not** is added, the report lists only students with an expected graduation year of 2013 or earlier.
   - **Greater Than** – the property selected must be greater than the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2015 or greater.
   - **In List** – the property selected must include one of the values entered in the **Value** field. Enter values separated by commas. For example, if **Grade** is the property and the values entered are *1, 2, 3*, the report lists all students in grades 1, 2, or 3.
   - **Less Than or Equal** – the property selected must be less than or equal to the value entered. For example, if **Age** is the property and the value is 15, the report lists students 15 and younger.
   - **Less Than** – the property selected must be less than the value entered. For example, if **Age** is the property and the value is 15, the report lists students younger than 14 and younger.
   - **Starts With** – the property selected must start with the value entered. For example, if **Enter Code** is the property and the value is R, the report lists students whose enter code starts with R (R1, R2, R3).

5. Enter the **Value** to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYYY format. When using a value from a list, enter either the Code or its Description. For example, for **Gender** enter either **M** or **Male**. When entering a value for a property with a check box, use **Y** for checked or **N** for not checked.

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6. Enter additional conditions if needed. For a record to be printed, it must match all of the conditions entered.

FILTERING BY STUDENT

If the report is a student-based report, you can select students to be included using the **Selection** tab. If the report is not a student-based report, this option is not available. To select which students should be included on the report:

1. Click the **Selection** tab.

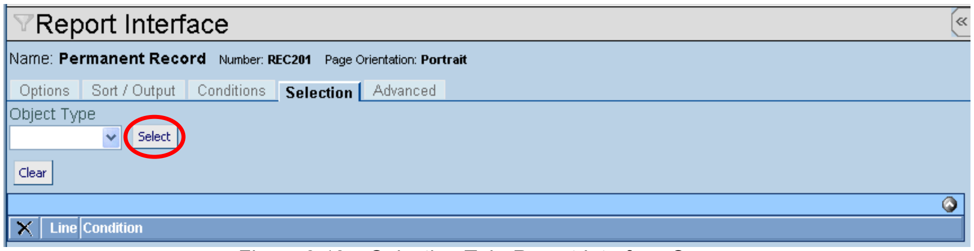

Figure 2.12 – Selection Tab, Report Interface Screen

2. Select **Student** in the **Object Type** list.
3. Click the **Select** button. The **Chooser** screen opens.
4. In the **Find Criteria** section, enter information known about the students to be included, and click the **Find** button at the top of the screen. You can use any part of the last name, first name, middle name, and/or ID, such as the first letters of a name.

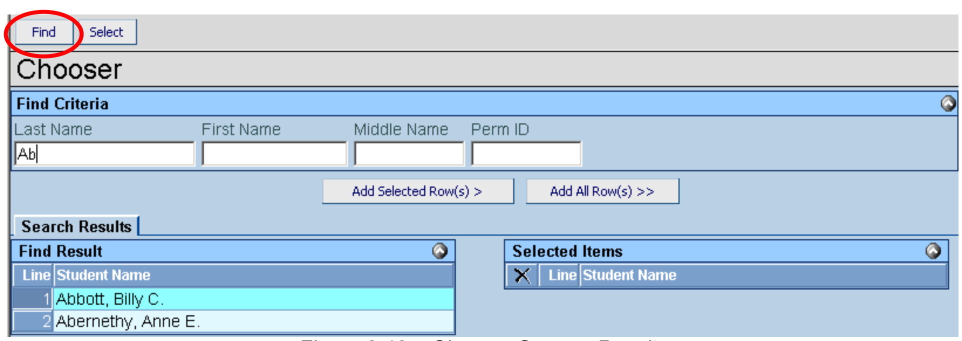

Figure 2.13 – Chooser Screen, Results

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5. In the list of students that appears in the Find Result grid, click one name or Ctrl-click multiple names, and click the **Add Selected Row(s)** button to add the student(s) to the **Selected Items** grid. Do multiple searches if required.

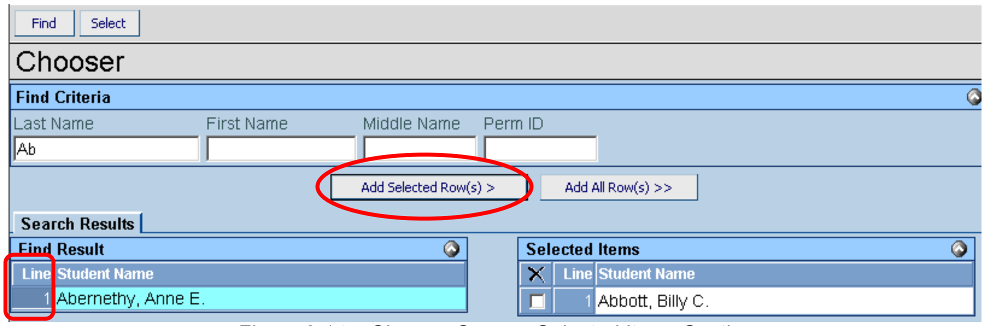

Figure 2.14 – Chooser Screen, Selected Items Section

6. Click the **Select** button at the top of the screen to add the students to the report.

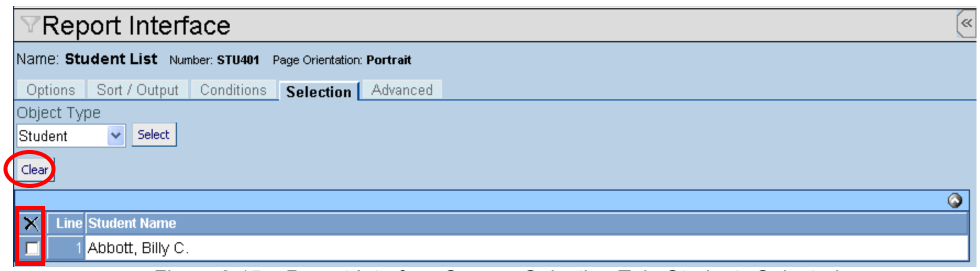

Figure 2.15 – Report Interface Screen, Selection Tab, Students Selected

Scheduling Reports

By default, when a report is printed, it runs once, and the options selected on all tabs are not saved. Reports can be created to run on a scheduled basis on the **Advanced** tab. When reports are scheduled, they run every time with the options selected on all tabs at the time the report was first run. They also run based on the year and school in focus at that point.

When a report is scheduled, a job is created in the Job Queue to run the report on the first scheduled time and date. When the report is run at the first scheduled time and date, it creates a new job to run at the next scheduled time and date, and so on. To stop a scheduled report, delete it from the Job Queue. For more information about working with the Job Queue, see to Chapter Six.

To schedule a report:

1. Select the options to be used in the report on the tabs of the **Report Interface**.

2. Click the **Advanced** tab.

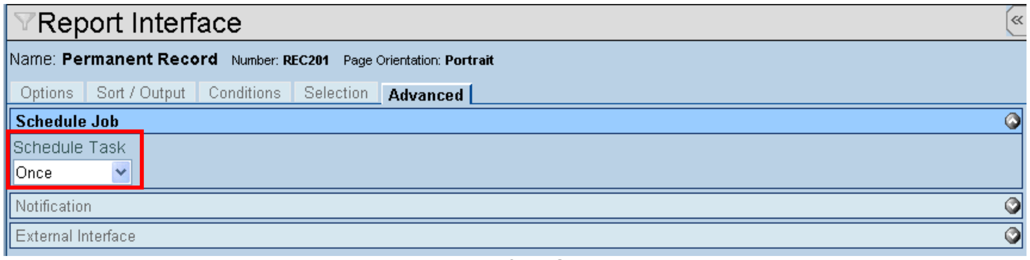

Figure 2.16 – Report Interface Screen, Advanced Tab

3. Select the frequency with which the report should be run from the **Schedule Task** list. Reports can be set to run **Once**, **Daily**, **Weekly** or **Monthly**. **Once** is for printing the report immediately.

4. For **Daily**, **Weekly** or **Monthly**, enter the time the report should run in the **Start Time** field in HH:MM AM/PM format. Enter the date the report should start running in the **Start Date** field, and, if needed, enter the date the report should stop running in the **Stop Date** field (for example, the date of the end of the school year).

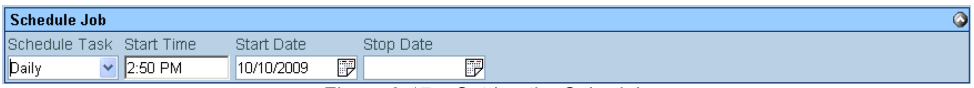

Figure 2.17 – Setting the Schedule

5. For **Daily** reports, enter the number of days between report runs. For example, to run a report every day, enter 1. Enter 7 to run the report once a week.

Figure 2.18 – Scheduling a Daily Report

6. For **Weekly** reports, enter the number of weeks between report runs. To run the report every week, enter 1. Also check the box for each day of the week on which the report should run. For example, a report could be scheduled run every week on Monday and Friday.

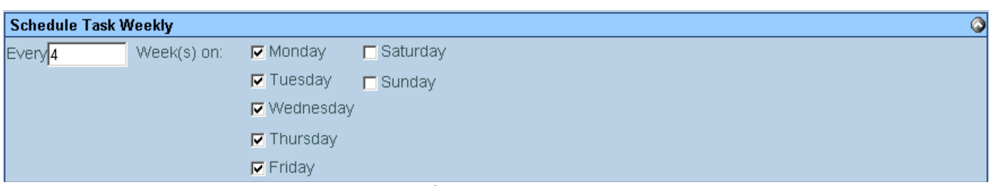

Figure 2.19 – Scheduling a Weekly Report

7. For **Monthly** reports, choose whether to run the report based on the **Day of the Month** such as the 1st or the 20th, or to run it based on a weekday, such as the second Tuesday of the month. Also check the box for each month during which the report should run.

Figure 2.20 – Scheduling a Monthly Report

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8. If desired, complete other fields on the **Advanced** tab, unrelated to scheduling reports, as described on the next few pages.
9. Click the **Print** button at the top of the screen to save and schedule the report. The **Job Status** window opens. A scheduled job does not go to the top of the queue and print until the scheduled date and time

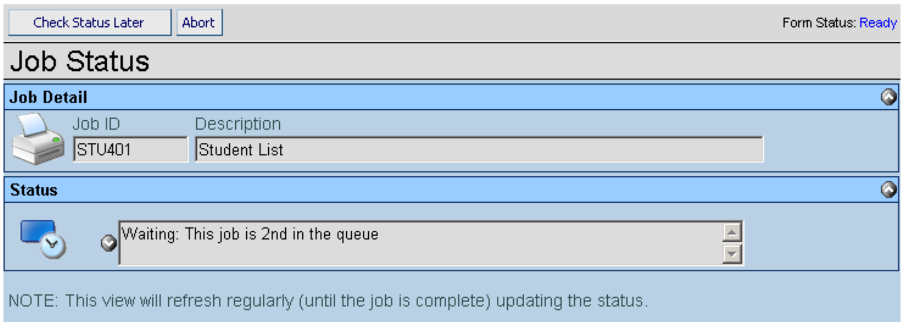

Figure 2.21 – Job Status Screen

10. .Close the **Job Status** window.

Caution: When reports are scheduled, they run every time with the options selected on the tabs of the **Report Interface**, and for the year and school in focus at the time the report was first run. These values cannot be edited after the report is first run. Be sure to set up the report exactly as it should be run each time before you click the **Print** button. To change a scheduled report, you must delete it from the Job Queue and recreate it.

After the report is run at its scheduled time, the results of the report can be opened and printed from the **Job Queue**. To remind report users each time the report has been run, notifications can be sent via e-mail.

Reference – Before sending notifications by email, you must configure Synergy SIS to use the local email server. For instructions on how to configure email, see the *Synergy SIS – System Administrator Guide*.

To notify users via e-mail when a scheduled report is run:

1. On the **Advanced** tab, click the Maximize button to expand the **Notification** section.

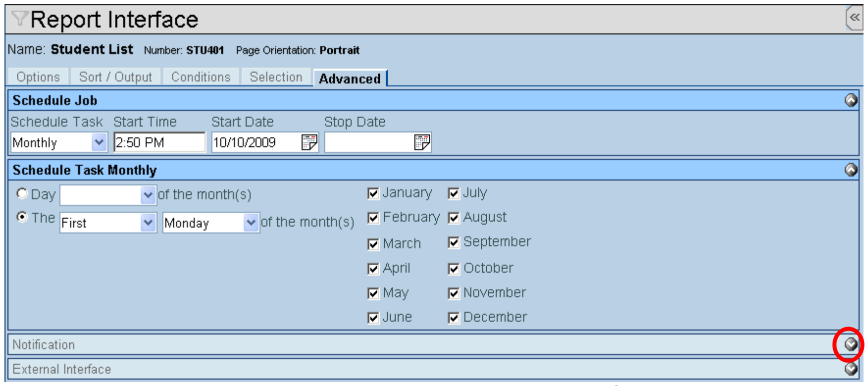

Figure 2.22 – Advanced Tab, Report Interface

2. Enter the email addresses of the users, separated by commas.

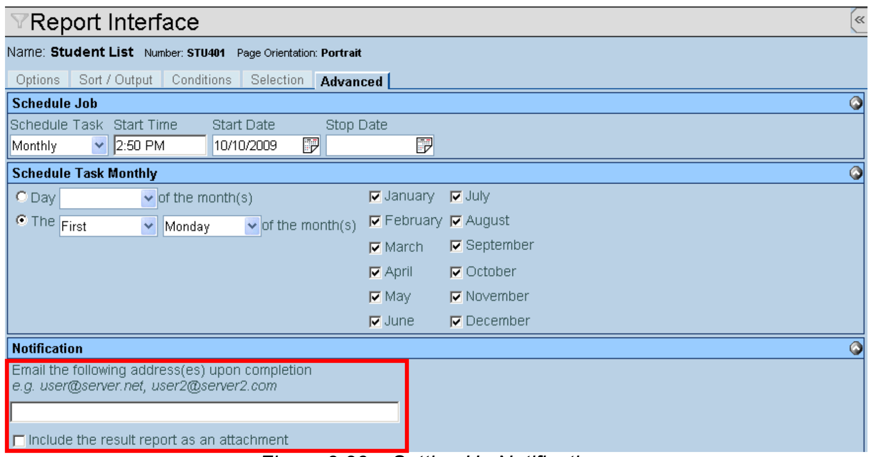

Figure 2.23 – Setting Up Notifications

3. To include the report in the e-mail so users don't have to go to the **Job Queue** for it, check the **Include the result report as an attachment** box.

Reports can also be saved as a file to a location on a server. This function can be used to export data from Synergy SIS that can then be imported or used in another program. To set the report to save to a file:

1. On the **Advanced** tab, click the Maximize button to expand the **External Interface** section.

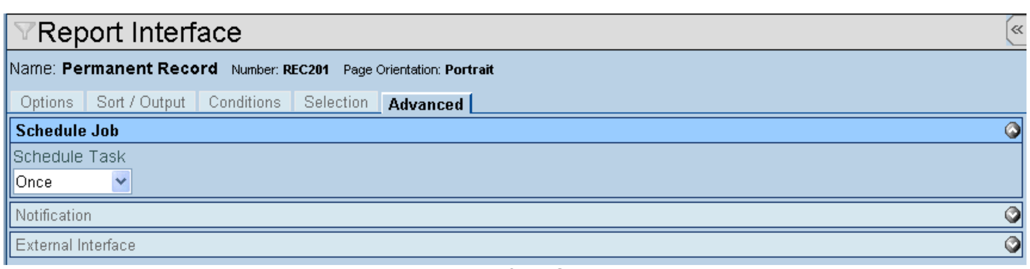

Figure 2.24 – Report Interface Screen, Advanced Tab

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2. In the box at the top of the section, enter the full UNC path and file name, such as \\SERVER\Folder\FileName.txt. To include the date and/or time in the file name to create a unique file name, include {Date}, {Time} or {DateTime} in the name of the file, such as File{Date}.txt to create file names like File20130703.txt.

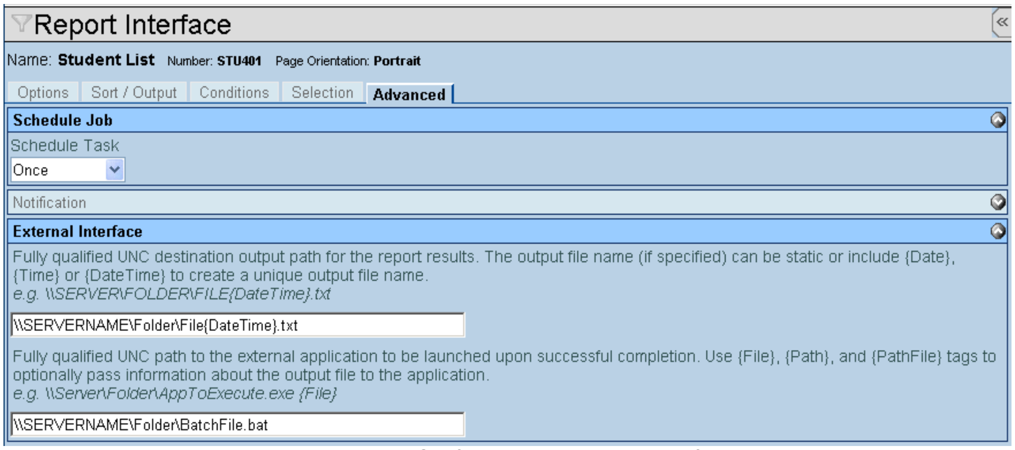

Figure 2.25 – Configuring the External Interface

3. If another program should be started each time the report is saved to this file, enter the full UNC path and file name of the program in the box at the bottom of the section, such as \\SERVER\Folder\BatchFile.bat. Information about the saved file can be passed to the program by using {File}, {Path} or {PathFile} after the name and location of the program, separated by a space or other commands, as \\SERVER\Folder\BatchFile.bat {Path}.

If the central printing option is configured for your district on the **Options** tab of **Synergy SIS > System > Setup > System Configuration**, you can send the report to a central printer.

1. On the **Advanced** tab, click the Maximize button to expand the **Centralized Printing** section.
2. Check the **Send to Central Printing** box.
3. Make selections in the **Job Description**, **Number of Copies**, **Job Type**, and **Paper Size** lists.
4. Check the **Three Hole Punch** box if desired.
5. To include special instructions or another message, use the **Delivery Message** field.

For information about configuring Synergy SIS to use centralized printing, see the *Synergy SIS – System Administrator Guide*.

DISTRICT REPORT OPTIONS

At the bottom of each report, a footer shows who printed the report, and the date and time the report was printed. It also shows the name of the district and the page number. A custom message can also be added just above the standard footer.

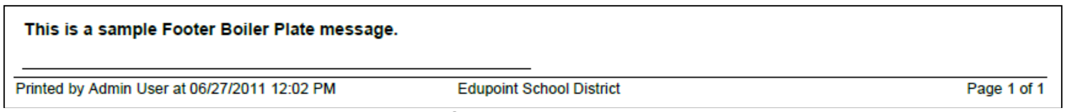

Figure 2.26 – Sample Report Footer Message

Note: The custom message functionality is not available on the following reports: STU210, IDS210, STU602.

You can also choose to mask unlisted phone numbers on reports that would otherwise show the numbers.

To configure footer settings across the district:

1. Go to **Synergy SIS > System > Setup > District Setup**, and click the **Reports** tab.

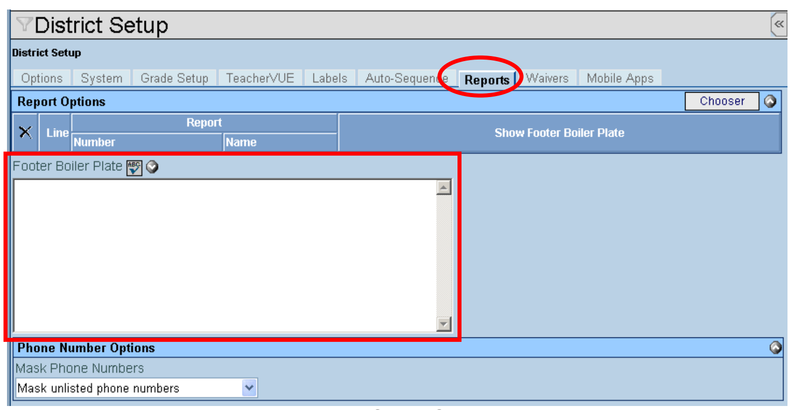

Figure 2.27 – District Setup Screen, Reports Tab

2. Enter the custom message in the **Footer Boiler Plate** box.

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3. Click the **Chooser** button, and find and select the reports that will display the custom footer.

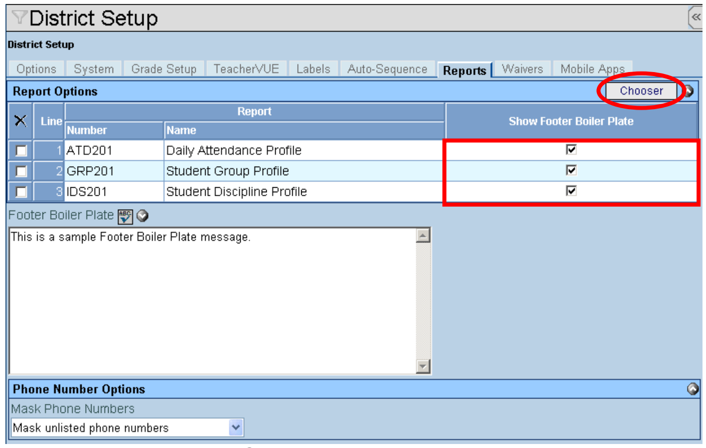

Figure 2.28 – Showing Footer Boiler Plate Message

4. Check the **Show Footer Boiler Plate** box for each report to display the message.

5. For reports that include list student, parent, or staff phone numbers, use the **Mask Phone Number** list to select whether to print unlisted numbers. **Mask unlisted phone numbers** shows unlisted numbers as follows:

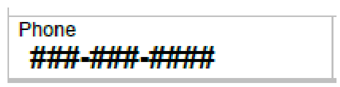

Figure 2.29 – Masked Phone Number

6. Click the **Save** button at the top of the screen.

Caution: Users may override this setting for their printed reports on the **Report Preferences** tab of the **User Password and Preferences** screen.

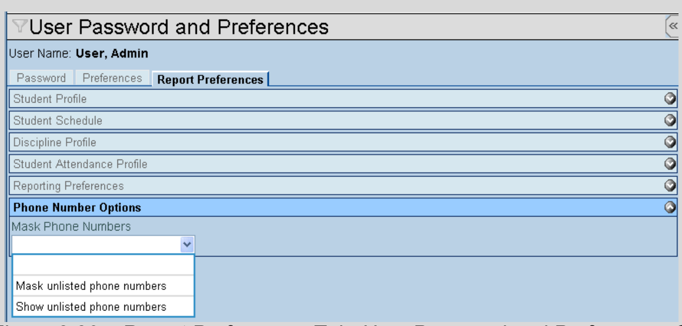

Figure 2.30 – Report Preferences Tab, User Password and Preferences Screen

REPORT GROUPS

Occasionally, there may be a need to print several reports for a student or group of students. For example, there may be several reports that the district would like to print each time a student withdraws. Rather than printing each report individually, you can create a report group to streamline this process. To create a report group:

1. Go to **Synergy SIS > System > Setup > Report Group**.

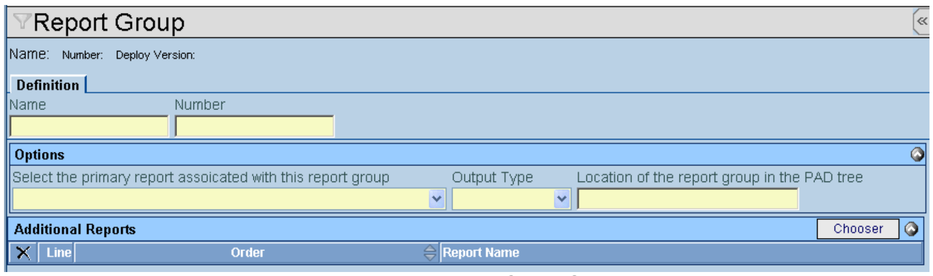

Figure 2.31 – Report Group Screen

2. Click the **Add** button, and a new **Report Group** window opens.

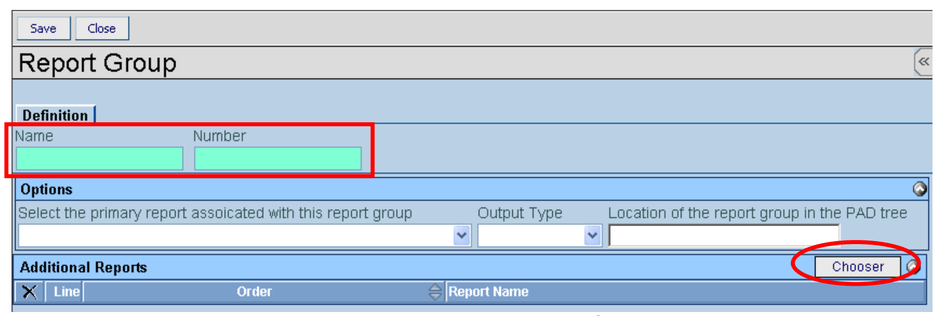

Figure 2.32 – Adding a Report Group

3. Enter the **Name** of the report group, and a **Number**. The number will be prefaced by UD- automatically when saved, as the report group is saved with the other user-defined reports in the PAD tree.
4. Click the **Chooser** button to select the reports to be included in the group. The **Chooser** window opens.
5. Enter all or part of the **Name**, **Number**, or both, for reports to be included in the group, and click the **Find** button.

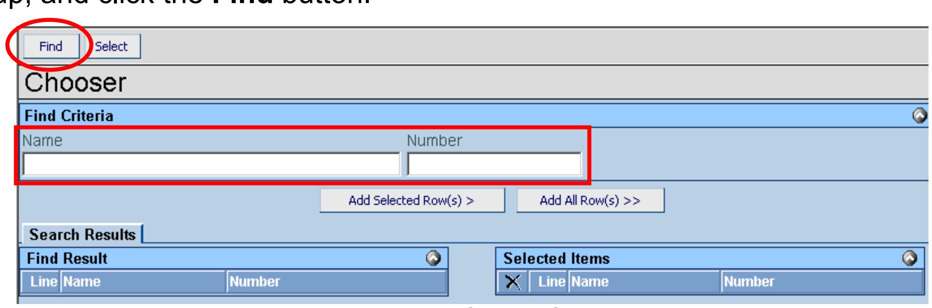

Figure 2.33 – Chooser Screen

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6. In the **Find Result** grid, click a report or Ctrl-click multiple reports to add, and click the **Add Selected Row(s)** button. Do multiple searches as needed until all reports have been found and added to the **Selected Items** section.

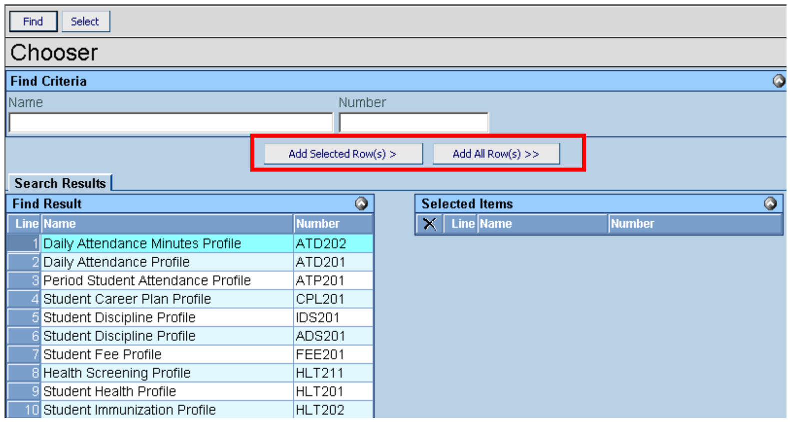

Figure 2.34 – Finding a Report

7. Click the **Select** button.The selected reports are added to the **Additional Reports** grid.

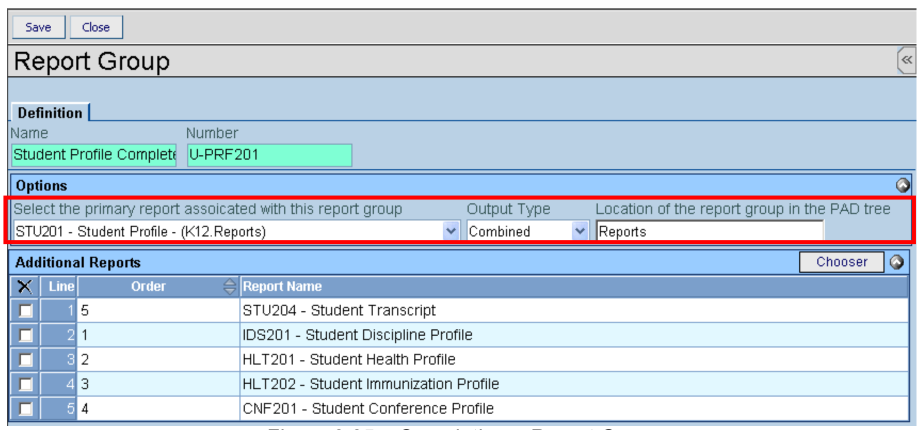

Figure 2.35 – Completing a Report Group

8. Choose the report to be used for the report interface for the group from the **Select the primary report associated with this report group** list.
9. Select the **Output Type**. A **Combined** group prints one PDF with all of the reports. A **Separate Files** group generates one PDF for each report in the group.
10. Enter the folder in the district PAD tree where the report group should be saved in the **Location of the Report Group in the PAD Tree** box.
11. Click the **Save** button at the top of the screen. Saved groups appear in the district PAD Tree as shown below.

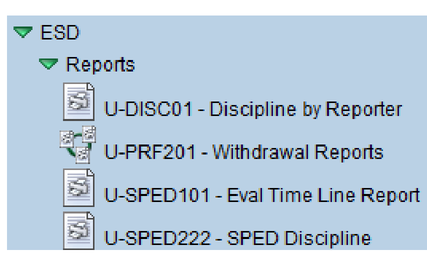

Figure 2.36 – Report Group Listed

When printing the report group, the group will use the **Report Interface** of the selected primary report. Be sure this report has the options needed for all other reports in the group.

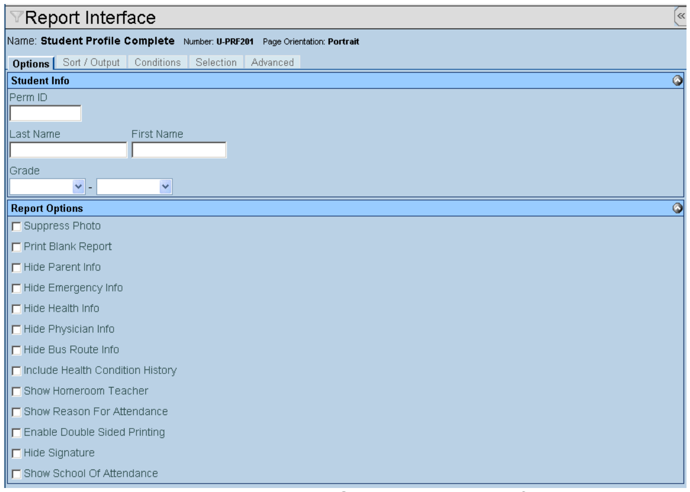

Figure 2.37 – Report Group, Report Interface

To edit or delete a report group:

1. Go to **Synergy SIS > System > Setup > Report Group**.

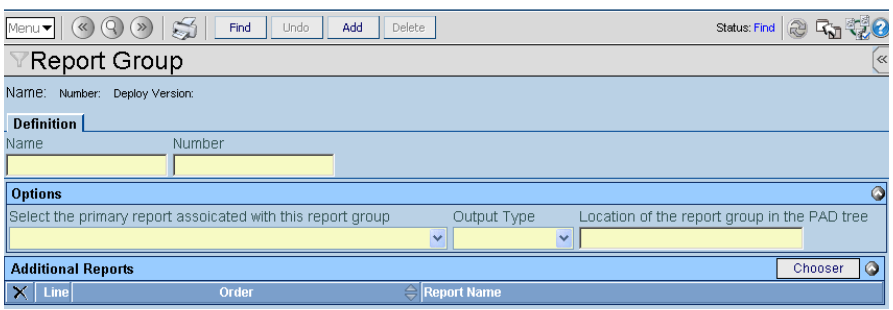

Figure 2.38 – Report Group Screen

2. Use Find mode or the Scroll buttons to find the group.

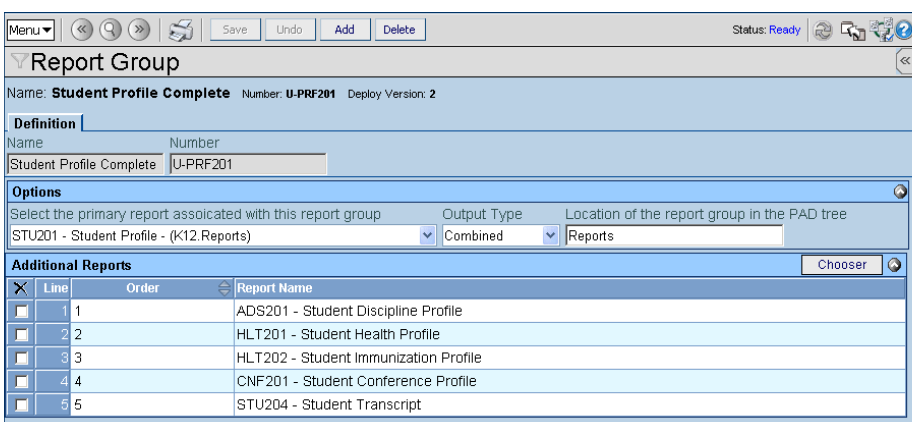

Figure 2.39 – Completed Report Group

3. To change the **Options**, click in any of the boxes and make a new selection.
4. To **remove a report** from the group, click in the box in the **X** column.

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5. Click the **Save** button at the top of the screen to save the changes.
6. To delete the entire group, remove all reports in the group first. Then click the **Delete** button at the top of the screen.
7. To change the name and/or number of the group, click the **Menu** button and select the **Edit ReportDef Data** option.

Figure 2.40 Report Group Menu Options

8. The **Name** and **Number** boxes turn white and the text can be edited. Make the changes, and then click the **Save** button at the top of the screen.

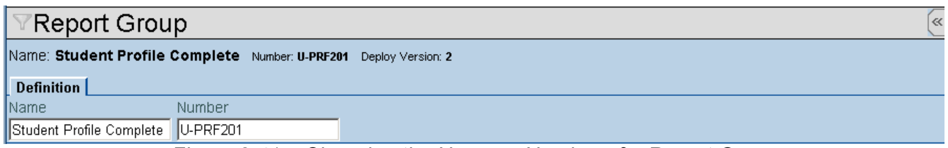

Figure 2.41 – Changing the Name or Number of a Report Group

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Chapter Three: QUERY USING FIND

In this chapter, the following topics are covered:

- ► How to create a report using Find Mode
- ► How to create charts using Find Mode
- ► How to print the Find results as a report
- ► How to create a query from the Find results
- ► How to create and manage Filters

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QUERY USING FIND

In addition to locating the exact record to view on screen, Find mode can act as a quick report writer. Find mode works in any screen in Synergy SIS. To use Find mode to produce a quick report:

1. Adjust the focus to select the school and year to be included on the report. Also select whether to include active or inactive students. The focus is indicated in the top right corner of the screen.

Figure 3.1 – Checking Current Focus

2. Go to the screen with the information for the report.
3. If the screen is not in Find Mode already, click the Find mode button. When a screen is in Find Mode, all fields are yellow.

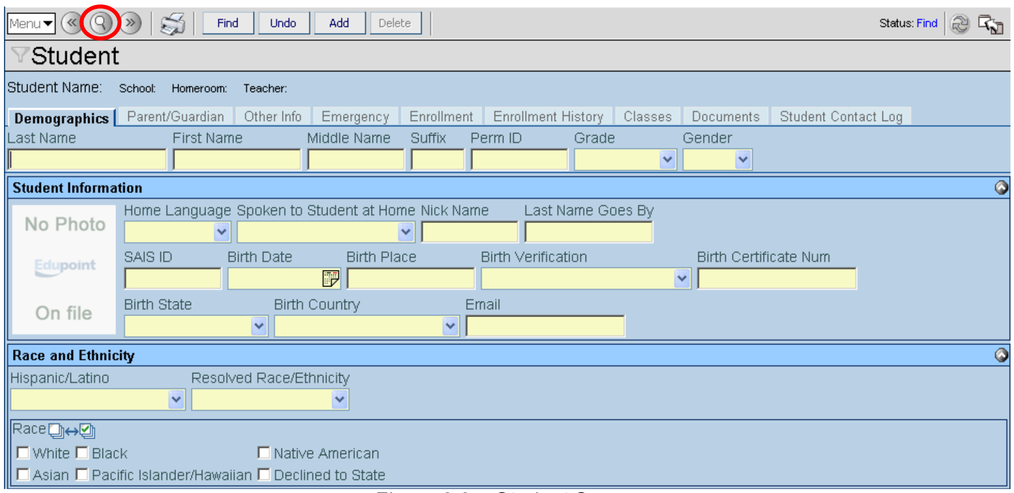

Figure 3.2 – Student Screen

4. To include a field in the report, enter an asterisk * in the field. (First, Middle and Last Names and Perm ID are included in all queries by default when launched in this manner, and do not require an asterisk.)

   In addition to selecting fields on just one tab, fields can also be selected on multiple tabs before clicking the Find button to create more complex reports.

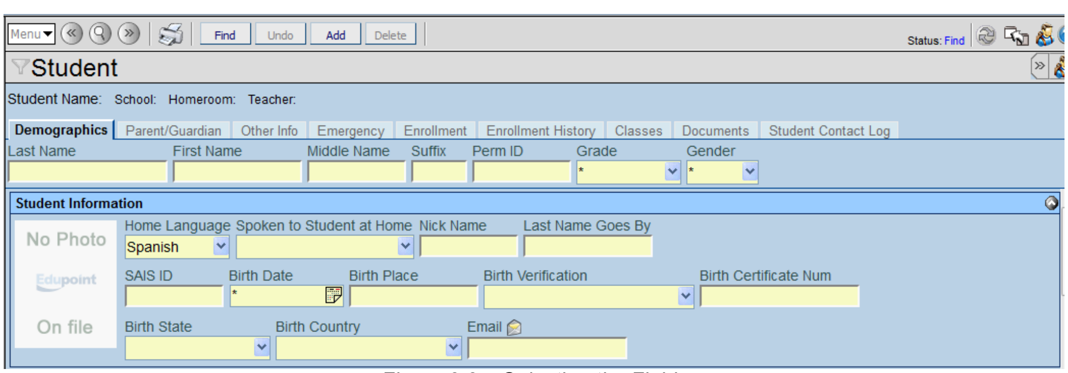

Figure 3.3 – Selecting the Fields

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> **Note** – Fields in grids such as the **Phone** grid on the **Student** screen or the **Students** grid on the **Class Grades** screen cannot be included in the Find Mode results.

5. To filter the report, enter the criteria by which to filter in the appropriate field. For example, to show only students with a home language of Spanish, select **Spanish** fin the **Home Language** list.
6. To match by the starting portion of the field, enter the first part of the text to match, followed by the asterisk. For example, entering **D*** in the **Counselor** field lists all students who have a counselor whose last name starts with D.

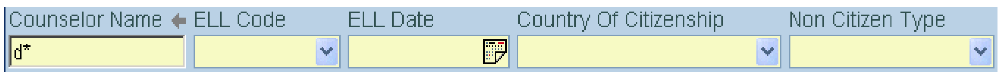
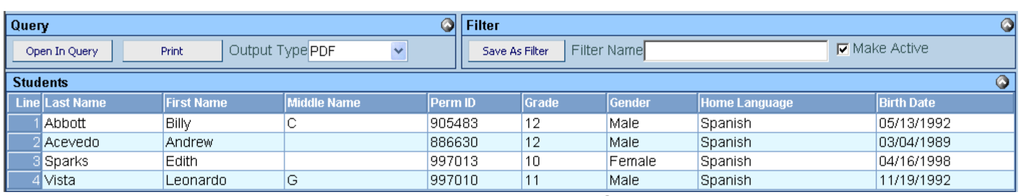


Figure 3.4 – Filtering By Text

7. To match the last part of the field, enter the asterisk followed by the text.
8. To find the text in any part of the field, enter an asterisk, followed by the text, followed by another asterisk.
9. If appropriate, use operators to filter the information included in the results. Operators include =, <, >, and <> (for not equal). This is particularly useful for date fields. For example, entering >=9/1/12 in the **Enter Date** field would return all students whose enter date is greater than or equal to 9/1/2012. Operators can be used with numbers, dates, and text.
10. Click the **Find** button to see the results. The results appear in a new window. The results can then be printed as a report, saved as a filter, or opened in a query as explained later in this chapter.



Line	Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Home Language	Birth Date
1	Abbott	Billy	C	905483	12	Male	Spanish	05/13/1992
2	Acevedo	Andrew		886630	12	Male	Spanish	03/04/1989
3	Sparks	Edith		997013	10	Female	Spanish	04/16/1998
4	Vista	Leonardo	G	997010	11	Male	Spanish	11/19/1992

Figure 3.5 – Find Results Screen

> **Note** – Some fields are mandatory for the Find results, regardless of where the asterisks are placed. For example, the **Student** screen always includes the student's Last Name, First Name, Middle Name, and Perm ID. The **District Course** screen always includes the Course ID and Course Title.

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CHARTING

Find mode can also produce basic charts based on the fields on the screen. Four types of charts are available – pie chart, bar chart, wave chart, and circle chart.

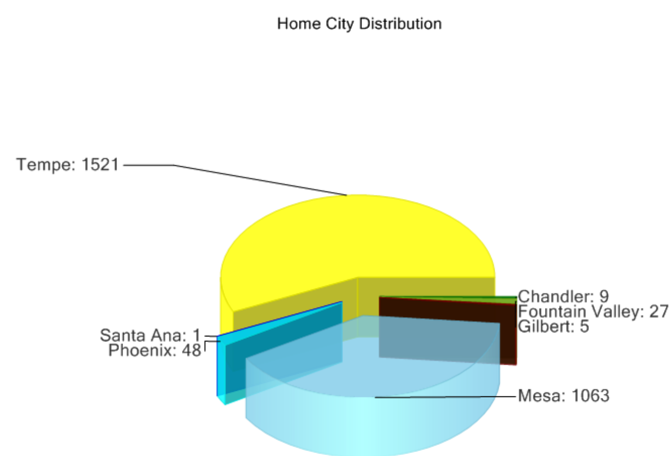

Figure 3.6 – 3D Pie Chart

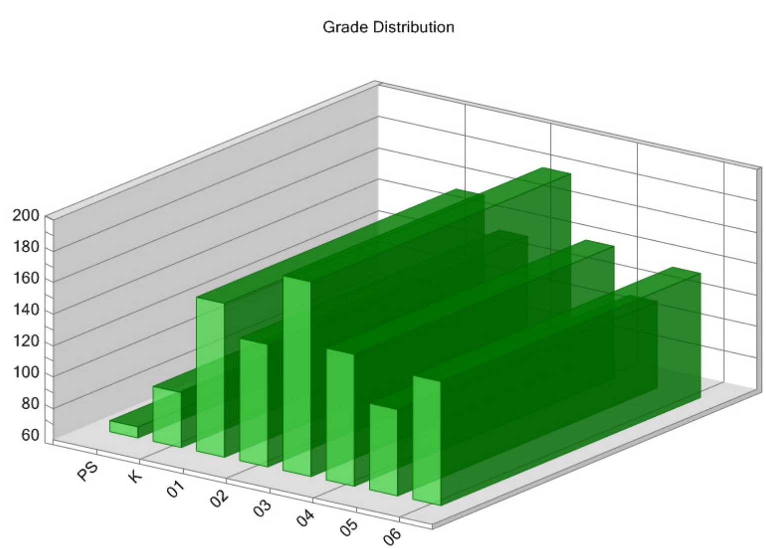

Figure 3.7 – Bar Chart

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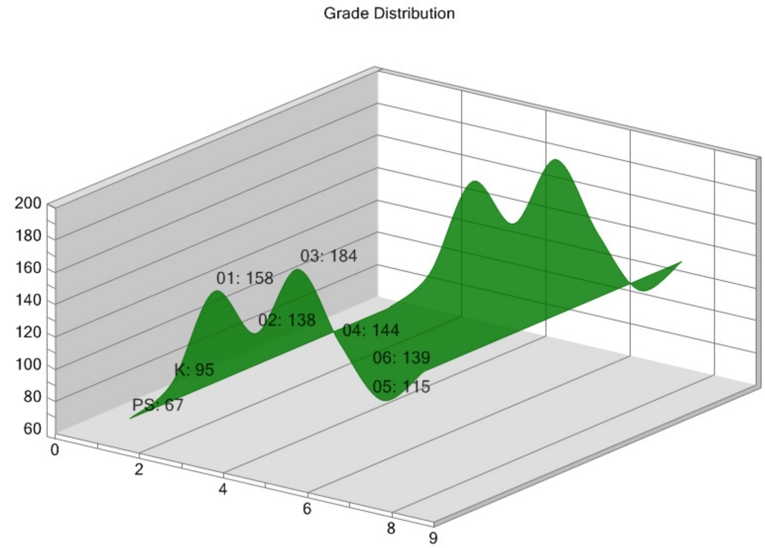

Figure 3.8 – Wave Chart

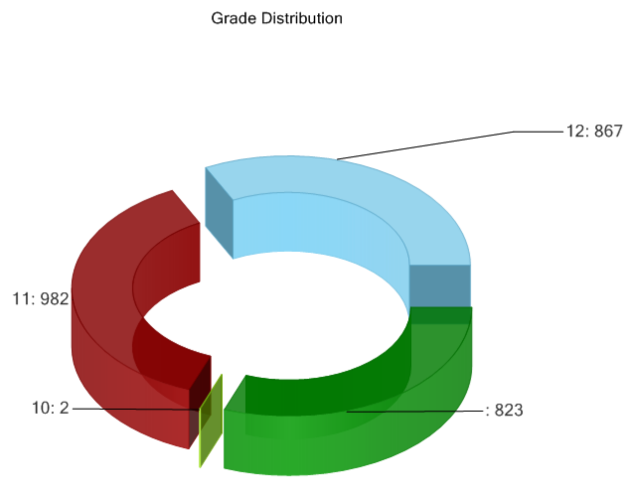

Figure 3.9 – Circle Chart

To print a chart:

1. Adjust the focus to select the school and year to be included in the report. Also select whether to include active or inactive students. The focus is indicated in the top right corner of the screen.

Figure 3.10 – Checking Current Focus

2. Go to the screen with the information for the report.

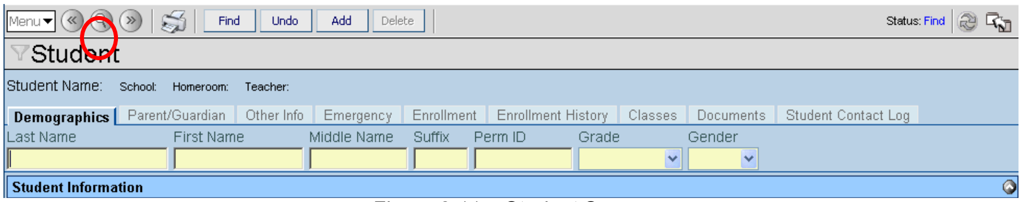

Figure 3.11 – Student Screen

3. If the screen is not in Find mode already, click the Find mode button. When a screen is in Find mode, all fields are yellow.
4. Enter one of the following characters in the field to chart.
   - **^** (caret) for a pie chart
   - **|** (bar) for a bar chart
   - **~** (tilde) for a wave chart
   - **$** (dollar sign) for a circle chart
5. Click the **Find** button, and the chart opens in a new window.

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PRINTING AS A REPORT

You can print the results of a Find by selecting an **Output Type** and clicking the **Print** button.

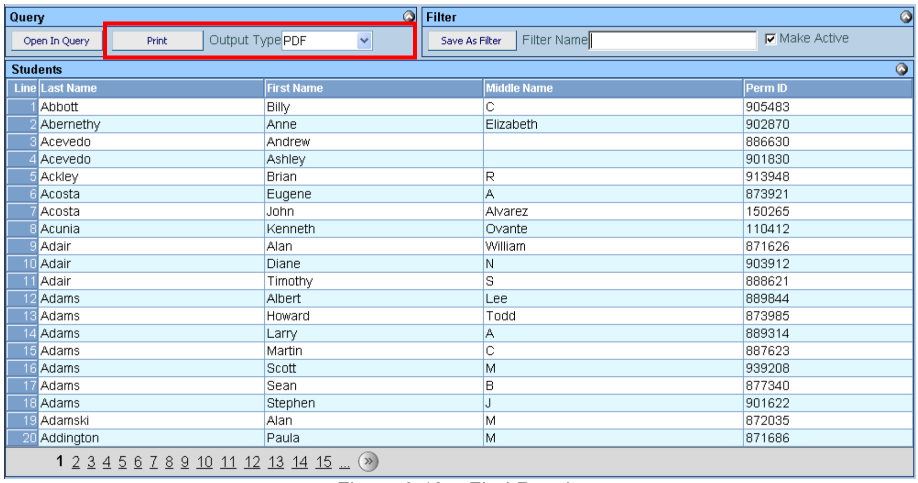

Figure 3.12 – Find Results

By default, the results print as PDF file to the screen. The resulting file can then be sent to the printer or saved. To change the results to a different format, select the type of file from the **Output Type** list. The possible file types are:

- **TIFF Image** – a graphics file
- **CSV** – a comma-separate values file
- **Excel** – a Microsoft Excel version 1997-2003 format file
- **HTML** – a web page in the standard Synergy SIS format
- **PDF** – a Portable Document Format for Adobe Reader
- **Rich Text** – a document file (basically Microsoft Word format)
- **Text File** – a plain text file with no formatting, in tab-delimited format
- **XML** – an extensible markup language file

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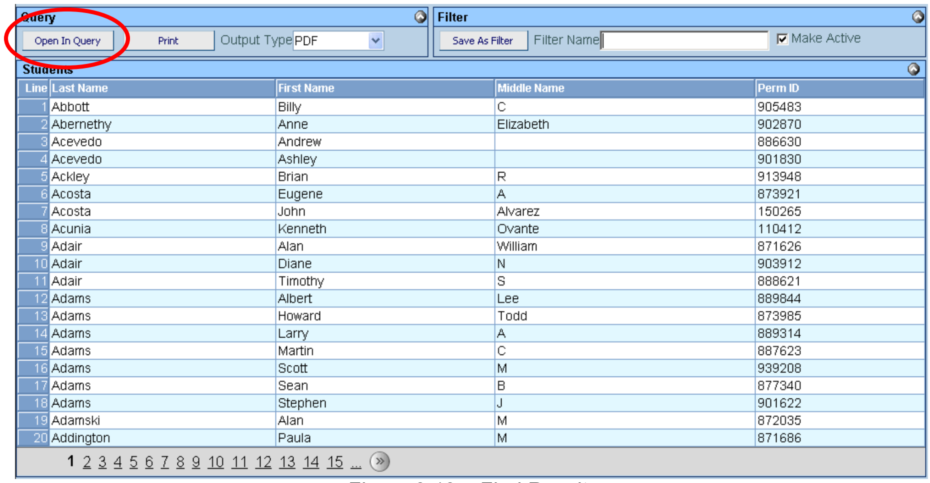
CREATING A QUERY

To further refine the results of the Find, the results can be opened in the **Query** screens. Click the **Open in Query** button at the top of the Find results.



Line	Last Name	First Name	Middle Name	Perm ID
1	Abbott	Billy	C	905483
2	Abernethy	Anne	Elizabeth	902870
3	Acevedo	Andrew		886630
4	Acevedo	Ashley		901830
5	Ackley	Brian	R	913948
6	Acosta	Eugene	A	873921
7	Acosta	John	Alvarez	150265
8	Acunia	Kenneth	Ovante	110412
9	Adair	Alan	William	871626
10	Adair	Diane	N	903912
11	Adair	Timothy	S	888621
12	Adams	Albert	Lee	889844
13	Adams	Howard	Todd	873985
14	Adams	Larry	A	889314
15	Adams	Martin	C	887623
16	Adams	Scott	M	939208
17	Adams	Sean	B	877340
18	Adams	Stephen	J	901622
19	Adamski	Alan	M	872035
20	Addington	Paula	M	871686

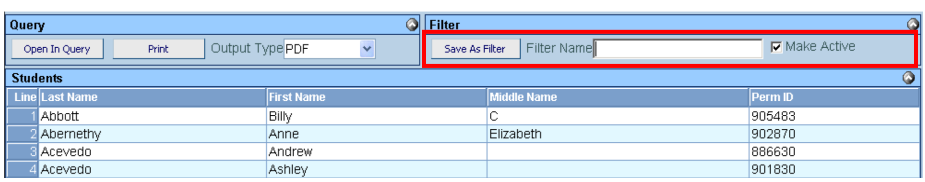
Figure 3.13 – Find Results

For information about how the query can be customized, see Chapter Four.

CREATING A FILTER

Find mode can also be used to create a filter to be applied to a screen. When a filter is applied to a screen, only the records that match the filter are see. This can make scrolling through records much easier. To save the Find results as a filter:

1. Enter a name for the filter in the **Filter Name** box.



Line	Last Name	First Name	Middle Name	Perm ID
1	Abbott	Billy	C	905483
2	Abernethy	Anne	Elizabeth	902870
3	Acevedo	Andrew		886630
4	Acevedo	Ashley		901830

Figure 3.14 – Find Results

2. To turn the filter on immediately, check the **Make Active** box.
3. Click the **Save As Filter** button.

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Once a filter has been created, it can be turned on and off by clicking the Filter icon in front of the name of the screen. The Filter icon looks like a funnel. To turn a Filter on and off:

1. Click the **Filter** icon.

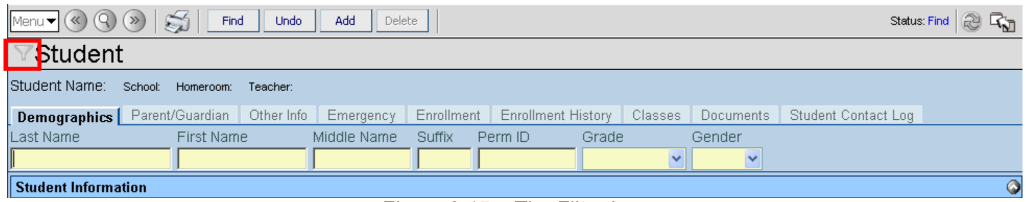

Figure 3.15 – The Filter Icon

2. The **Select Filters** menu opens. Check the filter or filters to turn on, and click the **Apply** button. To close the **Select Filters** menu without making any changes, click the **Close** button.

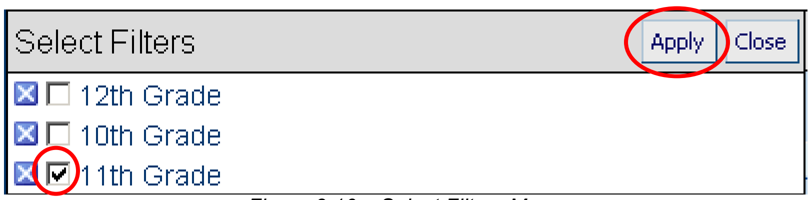

Figure 3.16 – Select Filters Menu

When a filter is applied, the **Filter icon** changes to indicate a filter is active.

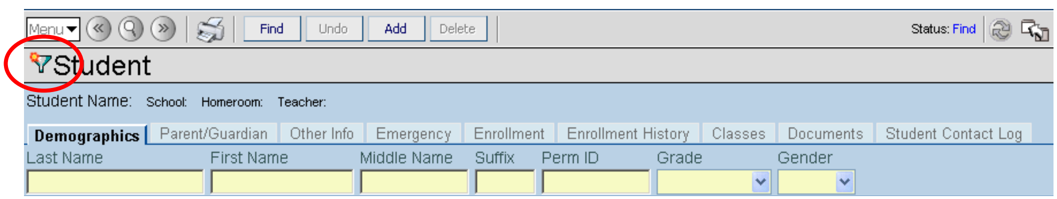

Figure 3.17 – Active Filter Icon

3. To turn a filter off, click the Filter icon, uncheck the box next to the filter, and click the **Apply** button.

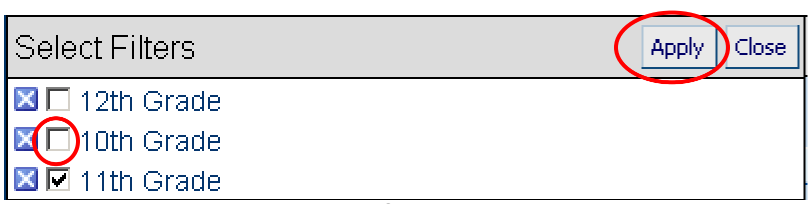

Figure 3.18 – Select Filters Menu

4. To delete a filter, click the Filter icon and click the **X** button next to the filter.

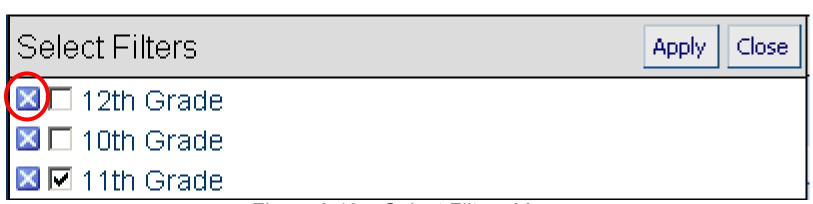

Figure 3.19 – Select Filters Menu

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Chapter Four:
QUERY

In this chapter, the following topics are covered:

- How to access the Query screen
- The parts of the Query Screen
- How to create a basic query
- How to save a query
- How to save a query as a report or as a public query

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A query is a way to define a custom report in Synergy SIS. A query can pull together any information in Synergy SIS, and queries can be saved so that they can be run repeatedly. They can also be saved as reports so they can be scheduled.

The **Query** screen is **Synergy SIS > Query> Query**.

PARTS OF A QUERY

There are three main parts to a query, represented by three tabs on the **Query** screen: **Columns**, **Conditions**, and **Sort**. The fourth tab, **Type in Query**, is where a query can be entered by typing instead of using the first three tabs to guide the query construction. Typing a query is for advanced users who are familiar with the conventions of the query language in Synergy SIS.

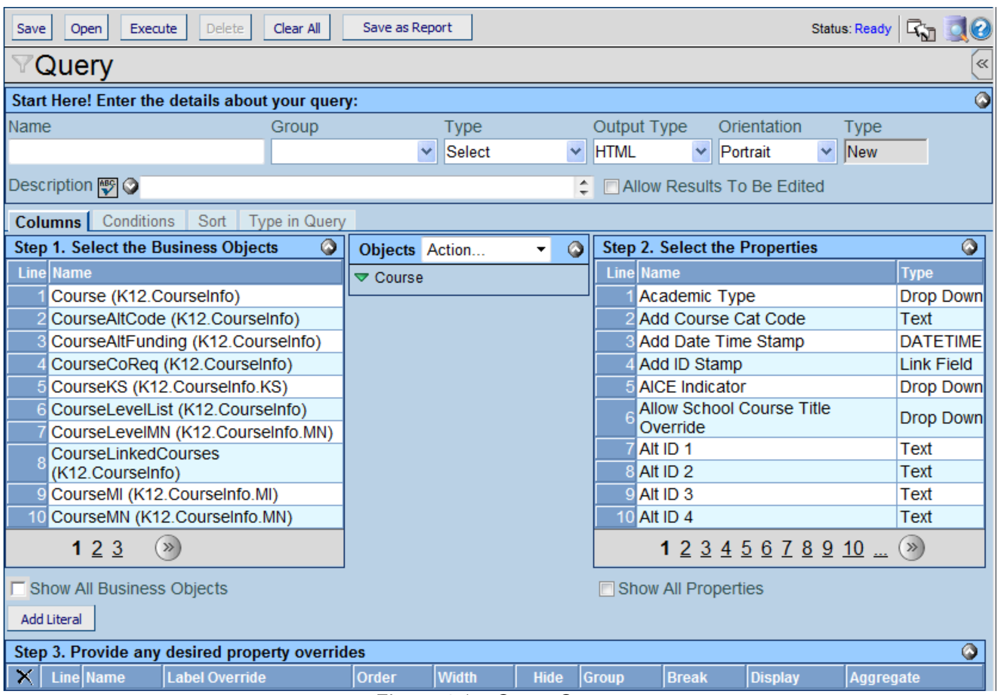

Figure 4.1 – Query Screen

- The **Columns** tab is where the information that will be included in the query are selected. It can also customize how the information is displayed. It is called **Columns** because the information selected will appear in the output report in columnar format.

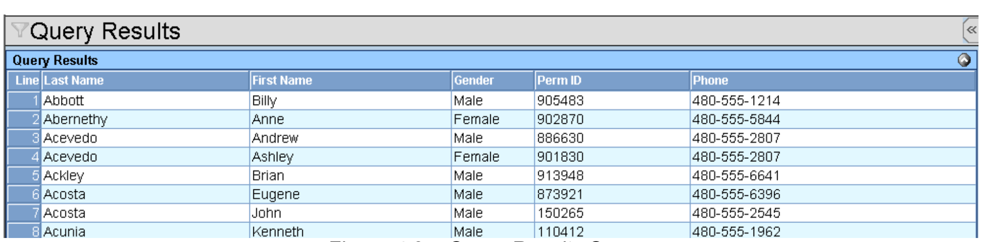

Figure 4.2 – Query Results Screen

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- The **Conditions** tab filters the information to be included in a query. If, for example, student information is selected on the **Columns** tab, the **Conditions** tab can define which students' information is included.
- The **Sort** tab defines the order in which the information is presented.

COLUMNS

The first part of creating a query is to choose the information to appear in the final report. Any information contained in Synergy SIS can be included in a query.

1. On the Columns tab, in the **Step 1. Select the Business Objects** grid, select business object to be used in the query from the list of the most commonly used business objects.
   The selected object appears in the **Objects** list, and the properties associated with the selected business object appear in the **Step 2. Select the Properties** grid.

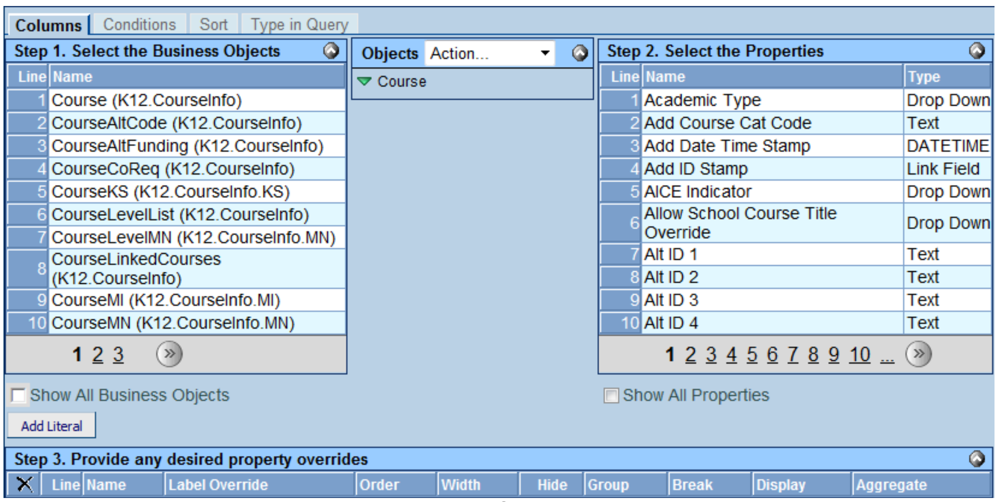
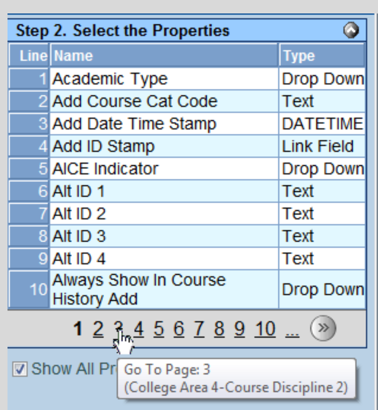


Figure 4.3 –Business Objects and Properties

> **Tip:** Pause your pointer over a page number to see the range of contents on that page.



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2. Click a property to be included in the query. It appears in the **Step 3. Provide any desired property overrides** grid.

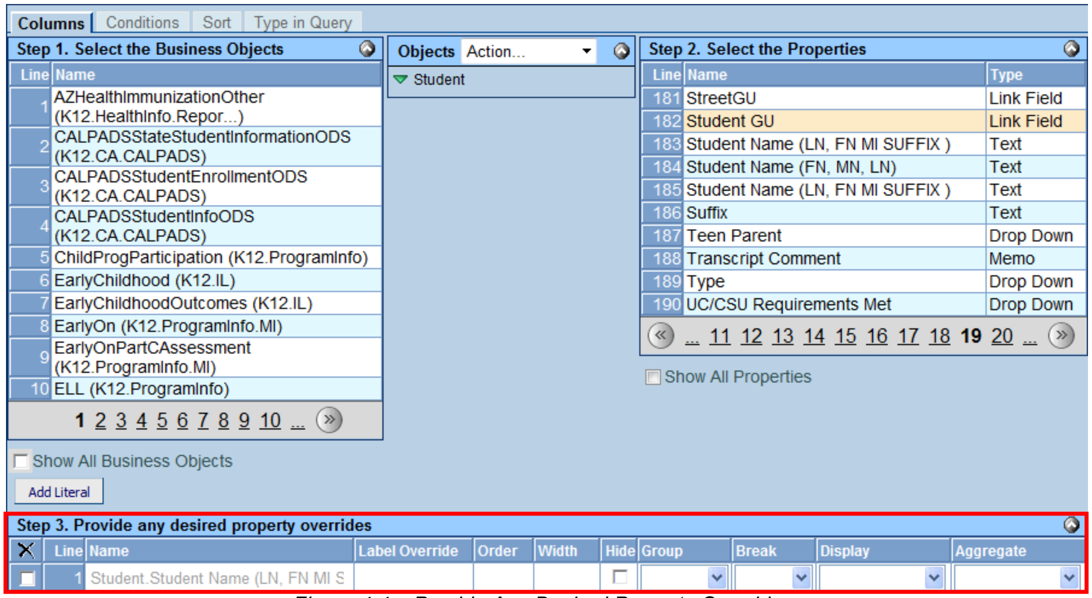

Figure 4.4 – Provide Any Desired Property Overrides

3. Click another property for the object to add it to the query, and continue adding properties until all needed information is shown in the **Step 3. Provide any desired property overrides** grid.

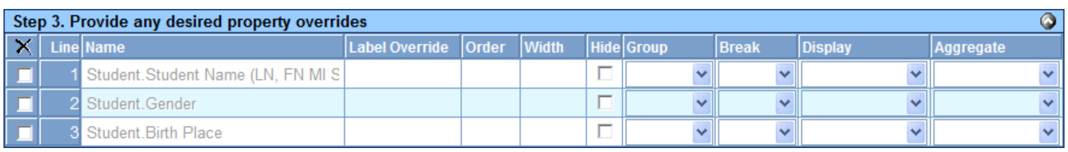

Figure 4.5 – Completed Basic Query

4. To see what the query will look like, click the **Execute** button at the top of the screen. The query opens in the format selected (the default is HTML). If the information is correct, the query can be saved or further customizations can be made.

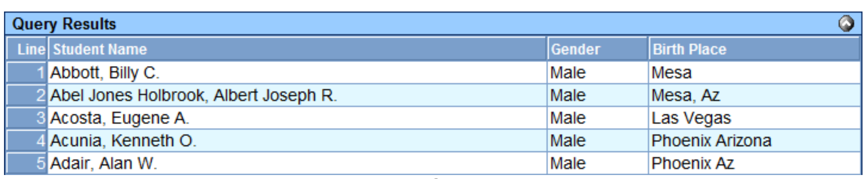

Figure 4.6 – Query Results

Adjust the query as described below and click **Execute** as many times as needed to test. To clear the query and start over, click the **Clear All** button at the top of the screen.

Reference – For instructions on how to use the **Show All Business Objects** and **Show All Properties** check boxes, and the **Add Literal** button, see Chapter Five.

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Some simple customizations can be made to the display of the query in the **Step 3. Provide any desired property overrides** grid.

Step 3. Provide any desired property overrides

X	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate
☐	1	Student.Student Name (LN, FN MI S				☐				
☐	2	Student.Gender				☐				
☐	3	Student.Birth Place				☐				

Figure 4.7 – Completed Basic Query

1. To delete a property from the report, check the box in the **X** column next to the property. The property is instantly removed from the list.
2. To change the heading of the column in the report, enter the new heading in the **Label Override** column. The default heading is the name of the property, such as Perm ID or Gender.
3. To change the order of the columns, enter sequence numbers in the **Order** column. If properties have the same number, order will default to alphabetical by Name.
4. To change the width of each column, enter the new width in inches in the **Width** column.
5. To hide a property so that it used in the query calculation but it is not displayed on the report, check the **Hide** box. This is generally used for more complicated queries as outlined in Chapter Five. However, it can also be used so that a property can be used for sorting or filtering but does not appear on the report.
6. Each property listed can be used to group the records with same value in the property. To group on a property, select the Group number from the **Group** list. Group 1 is the first property to group, Group 2 is the second, and so on. When a property is grouped, it is removed from the columns and placed at the top of each page on which the records of the group is listed.

Gender

Male

Last Name	First Name	Perm ID	Phone	Birth Country
Abbott	Billy	905483	480-555-1214	United States of America

Figure 4.8 – Grouped By Gender

Note – For groups to work correctly, the query must be sorted in the same order as the groups. For more information about sorting, please see the section on Sorting later in this chapter.

7. If grouping the records, a break should also be inserted into the report to allow the group information to display. While the group information does appear at the top of the page, it will be rare that the groups split exactly at the end of the page. Without the break, the records would still be grouped, but the group would not appear on the report. The **Break** can be by **Group** or by **Page**.

8. The **Group** break inserts information about the group and repeats the header information, but does not start a new page at the start of each group.

Australia, Commonwealth of

Last Name	First Name	Gender	Perm ID	Phone
Laurence	Jonathan	Male	167792	480-555-9641

Belgium, Kingdom of

Last Name	First Name	Gender	Perm ID	Phone
Renard	Amanda	Female	950761	480-555-5668

Figure 4.9 – Group Break

9. The **Page** break starts a new page at the start of each new group in addition to repeating the group and header information.

Hope High School
Query Result Portrait

Year: 2009-2010
Report: QRY801

Birth Country

Australia, Commonwealth of

Last Name	First Name	Gender	Perm ID	Phone
Laurence	Jonathan	Male	167792	480-555-9641

Figure 4.10 – Page Break

10. For properties that are lists, the property has a Code and a Description. For example, the code for gender is M but the description is Male. In the query, select from the **Display** list to display the **Code**, the **Description**, or **Both**. Selecting the **Default** option lets Synergy SIS select the best fit for the property. Usually the default is the description, but in cases where the description is very long the code is usually used (such as with Enter Codes). When **Both** is selected, the Code is displayed first and then the Description, separated by a hyphen.

Last Name	First Name	Gender	Perm ID	Phone
Ahlstrom	Linda	F - Female	120451	480-555-0641
Waters	Victor	M - Male	153227	480-555-0325
Louden	Karen	F - Female	901958	480-555-2962

Figure 4.11 – Display Both Option

11. To perform a function on the aggregate of records returned by the query, select the function in the **Aggregate** column.

- **None** is equivalent to a blank value and performs no function.
- **Count** shows the total number of records found in a query. For example, this query has no **Aggregate** set and returns student names and Perm IDs:

Step 3. Provide any desired property overrides

X	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate
☐	1	Student.Perm ID		2		☐				
☐	2	Student.Student Name (LN, FN MI S		1		☐				

Figure 4.12 – Query Without Aggregate

Query Results

Query Results

Line	Student Name	Perm ID
1	Abbott, Billy C.	905483
2	Abernethy, Anne E.	902870
3	Acevedo, Andrew	886630
4	Acevedo, Ashley	901830
5	Ackley, Brian R.	913948

Figure 4.13 – Results of Query Without Aggregate

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This query, with **Aggregate** set to **Count** for Perm ID, returns the count of Perm IDs:

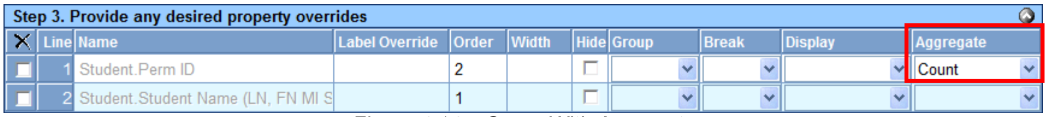

Figure 4.14 – Query With Aggregate

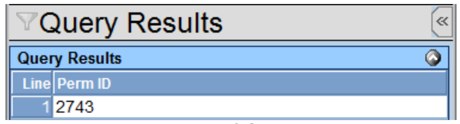

Figure 4.15 – Results of Query With Aggregate

- **Average** shows the mean value for a numeric field.
- **Max** shows the maximum value found for a numeric field.
- **Min** shows the minimum value found for a numeric field.
- **Sum** shows the total of values found for a numeric field.

CONDITIONS

Setting conditions for a query limits the information included on the query to the records that match the condition or conditions. To select conditions for the query:

1. Click the **Conditions** tab.

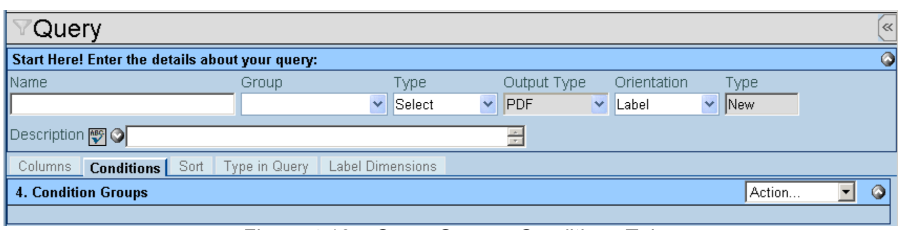

Figure 4.16 – Query Screen, Conditions Tab

2. Click the **Action** list and select **Add Condition**.

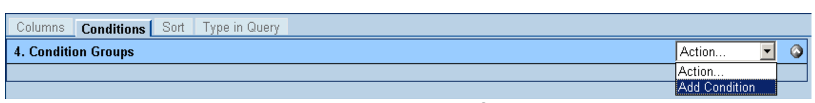

Figure 4.17 – Adding a Condition

3. The **Add Condition** screen opens. A condition is like a mathematical formula. It looks at each record to be included in the query, and compares it to the condition. If it matches the condition, it is included in the query. A condition has three main parts: which property in the query to examine, the operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

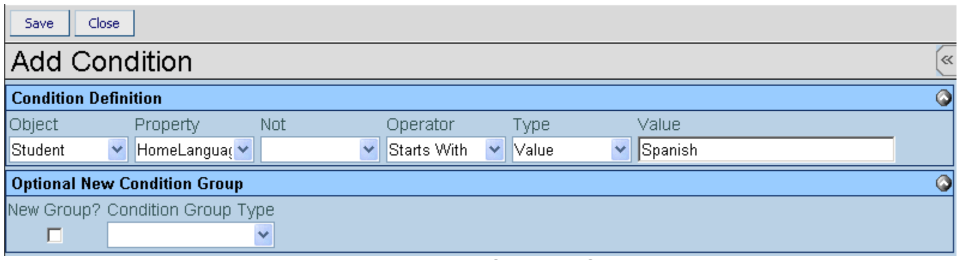

Figure 4.18 – Add Condition Screen

4. Select the **Object** that has the property to be used, and then select the **Property**. The objects available are those that you added to the query. However, any properties of the object can be used for the condition, not just the properties that have already been added to the query.
5. Set the operation by using the **Not** and **Operator** lists together. Selecting **NOT** from the list negates the operator. For example, if the **Operator** is **Equal To** and **NOT** is selected, the operation is Not Equal To. The Operator can be set to:
   - **Contains** – the property selected must contain the value entered. For example, if **Email** is selected as the property and the value entered is yahoo, the report lists all students with an email address that contains the letters *yahoo* (billy@yahoo.com, melissa@yahoo.com). If **Not** is added, the report lists all email address that do not contain *yahoo* (george@gmail.com, sandra@hotmail.com).
   - **Equal To** – the property selected must be exactly the same as the value entered. For example, if **Home Language** is selected as the property and the value entered is **English**, the report lists all students whose home language is English. If **Not** is added, it lists all students whose home language is not English.
   - **Ends With** – the property selected must end with the value entered. For example, if section IDs were created with the Course and Period option and 01 is entered as the value for the section ID property in a report, the report lists all sections for period 01.
   - **Greater or Equal** – the property selected must be greater than or equal to the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2014 or later. If **Not** is added, the report lists only students with an expected graduation year of 2013 or earlier.
   - **Greater Than** – the property selected must be greater than the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2015 or greater.
   - **In List** – the property selected must include one of the values entered in the **Value** field. Enter values separated by commas. For example, if **Grade** is the property and the values entered are *1, 2, 3*, the report lists all students in grades 1, 2, or 3.
   - **Less Than or Equal** – the property selected must be less than or equal to the value entered. For example, if **Age** is the property and the value is 15, the report lists students 15 and younger.

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- **Less Than** – the property selected must be less than the value entered. For example, if **Age** is the property and the value is 15, the report lists students younger than 14 and younger.
- **Starts With** – the property selected must start with the value entered. For example, if **Enter Code** is the property and the value is R, the report lists students whose enter code starts with R (R1, R2, R3).

> **Tip:** When using dates in a condition, a full date must be entered, such as 9/1/2009. To list all students who have the same enter date, for example, **Equal To** would be used. To list all students who entered on or before a date, **Less Than or Equal** would be used.

6. Select the type of value to be compared from the **Type** list. It can either be a **Value** (the most common option) or a **Property**. A **Value** is the actual contents of the property, such as numbers or letters. A **Property** is the status of the property, such as an error code.
7. Enter the **Value** to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYYY format. When using a value from a list, enter either the Code or its Description. For example, for Gender enter either **M** or **Male**. When entering a value for a property with a check box, use **Y** for checked or **N** for not checked.
8. Click the **Save** button at the top of the screen.

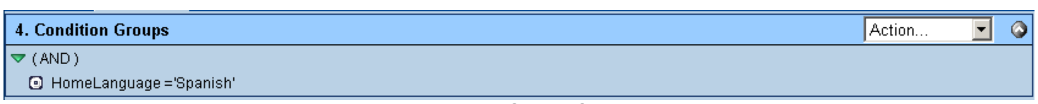

Figure 4.19 – Saved Condition

By default, conditions are added as an **"AND"** condition group, meaning that the records must meet all conditions in the group to be included in the query. The initial condition must always be an "AND" condition group. Once the initial condition has been added, "OR" condition groups can also be added. An "OR" condition group means that the records must meet only one of the conditions to be included in the query.

To create a condition group, check the box **New Group** when saving a new condition, and select the type of group from the **Condition Group Type** list.

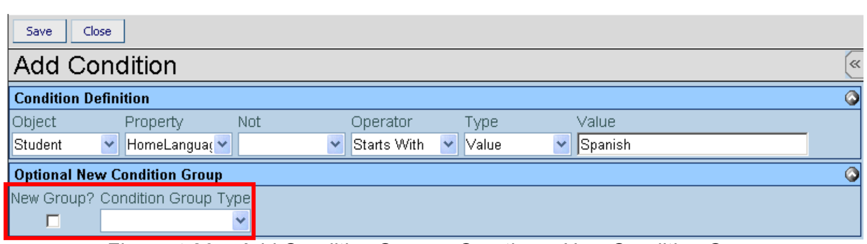

Figure 4.20 – Add Condition Screen, Creating a New Condition Group

Groups can be nested, and an unlimited number of groups and conditions can be added to create very complicated conditions. An example of a nested condition group is shown below. This grouping means the records in the query must have a birth date less than 9/1/1995 AND a birth country containing Canada OR US.

Figure 4.21 – Nested Condition Groups

To nest a condition group:

1. Click the existing condition under which to create a group.
2. Click the **Action** list, and select **Add Condition to CONDITION**.

Figure 4.22 – Adding a Condition to a Condition

3. In the **Add Condition** screen, enter the new condition.

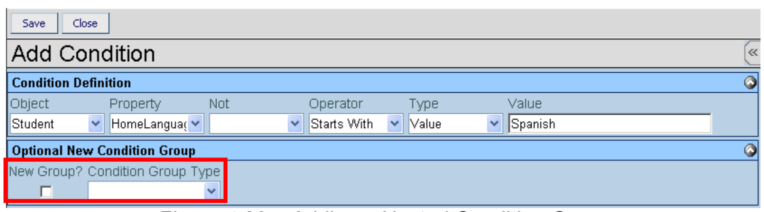

Figure 4.23 – Adding a Nested Condition Group

4. Check the **New Group** box, and select the type of group from the **Condition Group Type** list.
5. Click the **Save** button to create the new group with the new condition.

To add a condition to an existing condition group:

1. Click the group (AND) or (OR).
2. Click the **Action** list and select **Add Condition to GROUP**.

Figure 4.24 – Adding a New Condition to an Existing Group

3. In the **Add Condition** screen, enter the new condition, and click **Save**. The new condition is added to the selected group.

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SORTING

The sort order is the sequence in which the records included in the query appear. If no sort order is selected, the records are sorted by the default sort order of the primary object. For example, the Student object is sorted by Last Name unless otherwise specified. To add a new sort order to the query:

1. Click the **Sort** tab.

Figure 4.25 – Sort Tab

2. Click the **Add** button, and a new sort line is added.

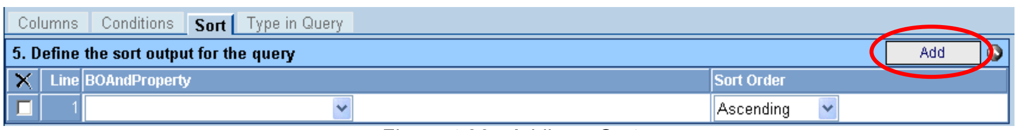

Figure 4.26 - Adding a Sort

3. Select the **Property** to be used for sorting from the **BOAndProperty** list. Only the properties that have been selected for use in the query on the **Columns** tab are available.
4. Set the direction of the sort in the **Sort Order** column. **Ascending** sorts from smallest to largest value, or from A to Z. **Descending** sorts from largest to smallest, or from Z to A.
5. To add another property for the sort, click the **Add** button again. The sort occurs in the order in which the properties appear on the **Sort** tab. For example, the sort shown below would sort by Last Name and then First Name.

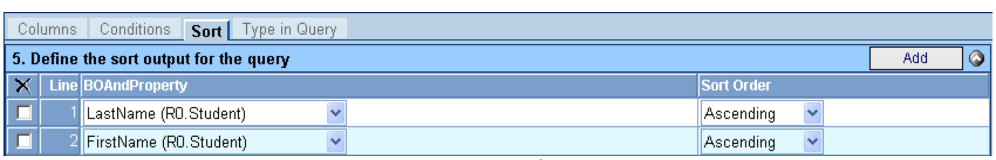

Figure 4.27 – Multiple Sort Properties

LABELS

Labels are a special category of queries that allow queries to be printed on standard label formats. To create a label query:

1. Select the columns, conditions, and sort as needed to create the query.
2. In the **Orientation** list, select **Label**. A **Label Dimensions** tab is added to the **Query** screen.

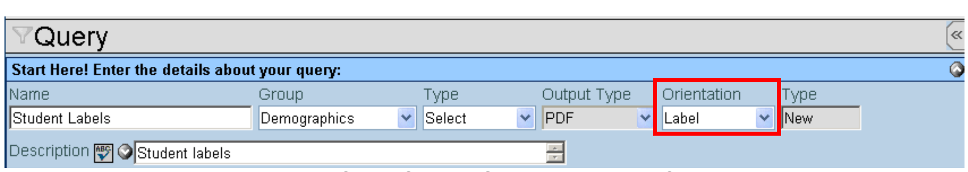

Figure 4.28 – Query Screen, Selecting Label as Orientation

3. Click the **Label Dimensions** tab to select and format the label.

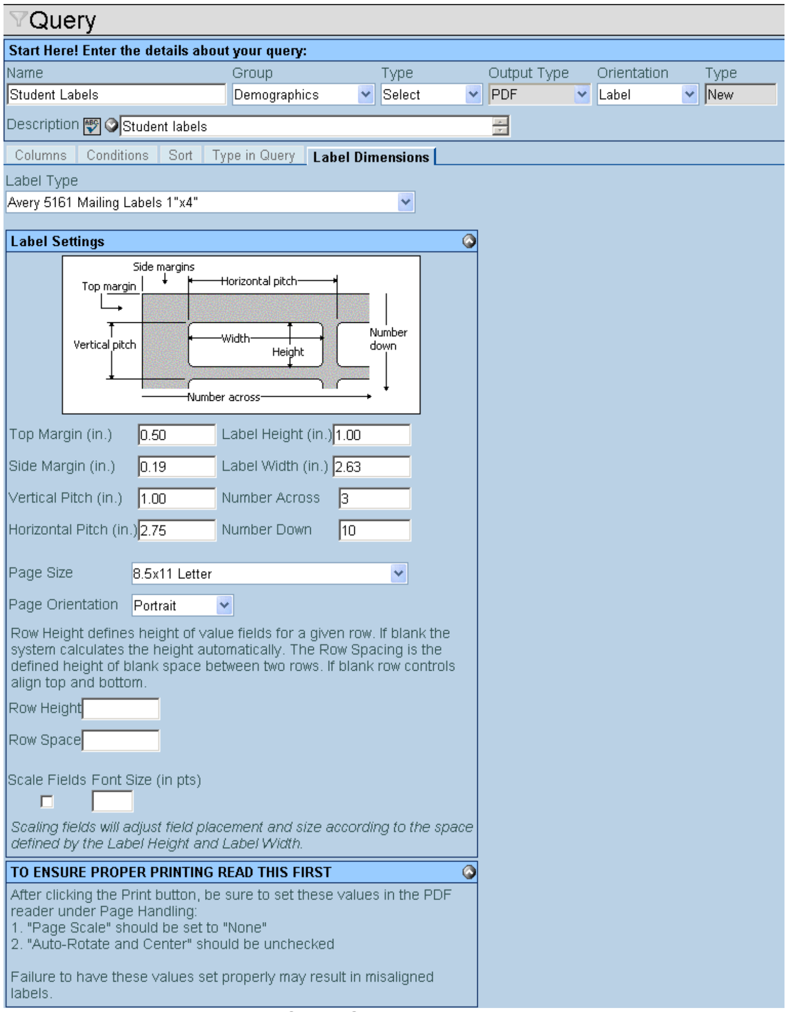

Figure 4.29 – Query Screen, Label Dimensions Tab

4. Select the type of labels to be used from the **Label Type** list. Labels are defined in **Synergy SIS > System > Setup > Label Detail**. For more information about defining labels, see the *Synergy SIS – System Administrator Guide*.
5. **Top Margin, Label Height, Side Margin, Label Width, Vertical Pitch, Number Across, Horizontal Pitch, Number Down, Page Size** and **Page Orientation** should be adjusted only if printing custom labels or if after testing the commercial labels need a slight adjustment.
6. To specify how much space each of the fields in a row should take on a label, enter the value in the **Row Height** box. **Row Space** specifies how much white space is placed between each row. If these values are blank, the system calculates the height automatically.
7. To have the fields in the label shrink or expand to fit the selected label size, check the **Scale Fields** box. A minimum **Font Size** can also be specified.

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8. When printing the PDF File that is created by the query, be sure to change the Page Handling settings before printing the labels. Change the **Page Scaling** to **None,** and uncheck the **Auto-Rotate and Center** box.

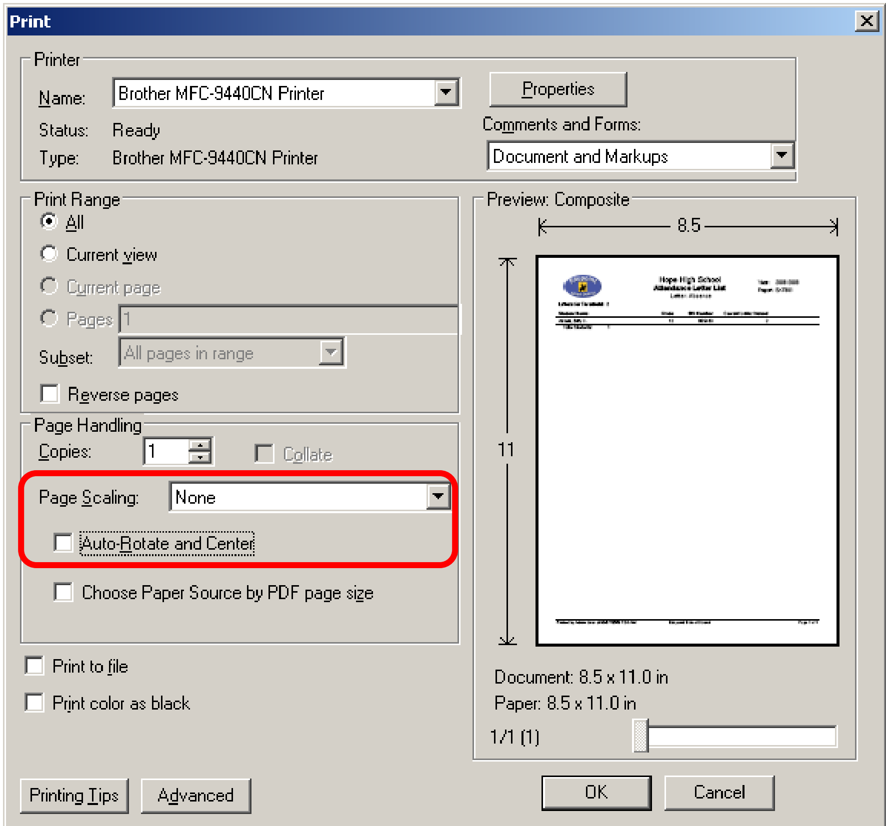

Figure 4.30 – PDF Print Options

SAVING A QUERY

While the information selected on the Columns, Conditions & Sort tabs is different for every query, the basic information recorded at the top of the Query screen needs to be saved for every query. To save a query:

1. Enter a short name for the query in the **Name** box.

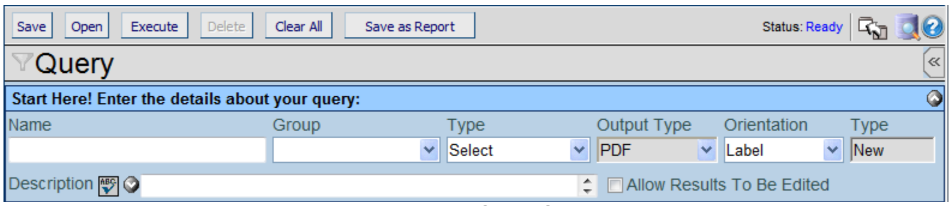

Figure 4.31 – Query Screen

2. A longer explanation of the query can be entered in the **Description** field.
3. Select the **Group** to be assigned to the query from the list. The Group is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in Chapter Six of this guide.
4. Select the **Type** of query. **Select** returns a row for each record. For example, a query based on student enrollment might return five results for a student who has been in the district five years. **Select Distinct** returns a single occurrence for this student. **Filter** creates a filter that combines multiple fields (for example Grade and Gender) or uses data that is not generally displayed on a given screen.
5. The **Output Type** shows the default output format for the query, and it can be changed to any of the following by clicking the list:

   - **TIFF Image** – a graphics file
   - **CSV** – a comma-separate values file

     If you select CSV, additional fields appear.

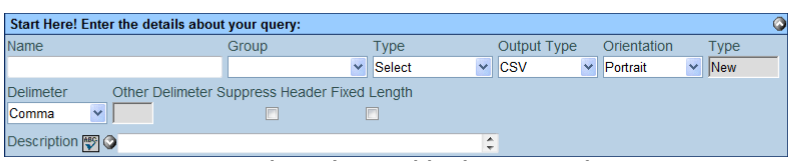

Figure 4.32 – Query Screen, CSV Output Type Selected

     Select the **Delimiter** to be inserted between fields. If you select **Other**, enter the desired character in the **Other Delimiter** box. Check the **Suppress Header** box if you want to omit the header row from the output file, and check the **Fixed Length** box if you want to make all columns in the output the same size, regardless of the data in them.

   - **Excel** – a Microsoft Excel version 1997-2003 format file

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- **HTML** – a web page in the standard Synergy SIS format

  If you select **HTML**, the **Allow Results To Be Edited** check box enables you to see the query results in an editable grid. You can change values and click the Add button to add rows. Click **Save** to save your changes to the database.

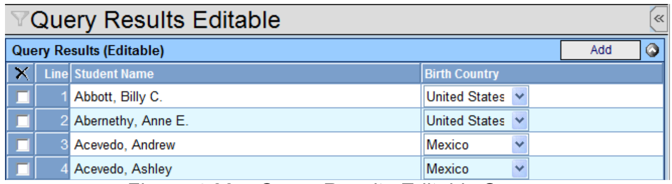

Figure 4.33 – Query Results Editable Screen

- **PDF** – a Portable Document Format for Adobe Reader
- **Rich Text** – a document file (basically Microsoft Word format)
- **Text File** – a plain text file with no formatting, in tab-delimited format

  If you select **Text File**, you can check the **Suppress Header** box to omit the header row from the output file, and check the **Fixed Length** box if you want to make all columns in the output the same size, regardless of the data in them.

- **XML** – an extensible markup language file

6. Select the **Orientation** to be used in the printed output, either **Landscape** or **Portrait**. The **Labels** orientation is covered in the section on Labels later in this chapter.
7. Type a **Description** of the query. Especially if you will nominate our query for public use (see step 9), this description should be detailed.
8. Click the **Save** button at the top of the screen. The **Save Query** screen opens.
9. To nominate your query to be a public query available to all Synergy SIS users, check the **Nominate for Public** box. Public queries must be reviewed and approved by administrators before the query is listed as a public query. For more information about public queries, see the section on Managing Public Queries in Chapter Six.
10. To save the query to the list of queries for the logged-in user, click the **Save** button.

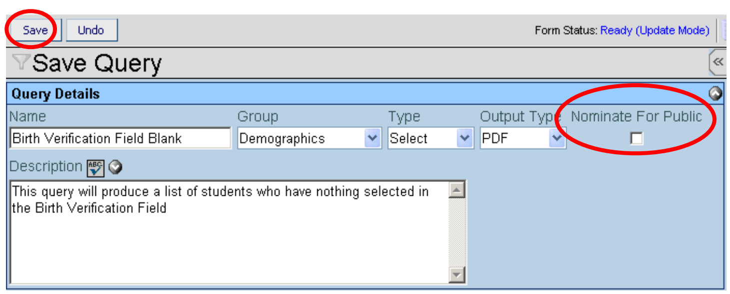

Figure 4.34 – Save Query Screen

SAVING A QUERY AS A REPORT

Queries can also be saved as reports. This has advantages: The report can be run by anyone with access to the report, and the report interface is easier to use than the query interface. Reports can also be scheduled to be run at regular intervals. For more about working with reports, see Chapter Two. To save a query as a report:

1. At the top of the **Query** screen, click the **Save As Report** button. The **Save User Report** screen opens.

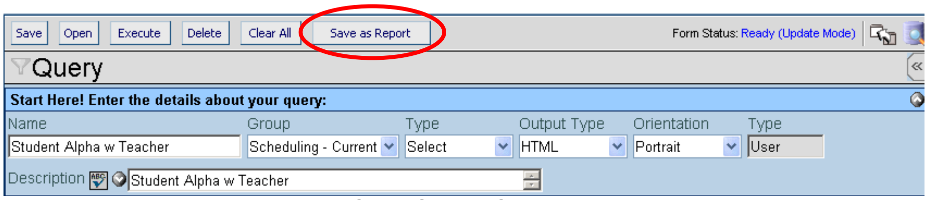

Figure 4.35 – Query Screen, Save As Report Button

2. Enter the name of the report as it should appear in the User PAD Tree in the **Report Name** field. Enter an ID for the report in the **Report ID** field.

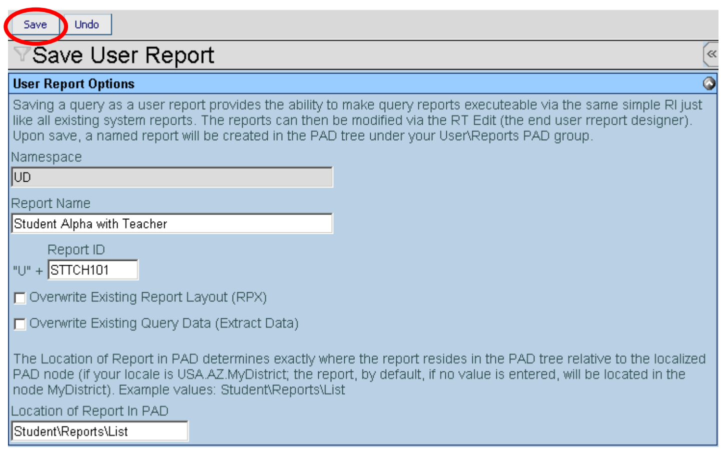

Figure 4.36 – Save User Report Screen

3. If a report exists with the same Report ID, select whether or not to **Overwrite the Existing Report Layout** and to **Overwrite the Existing Query Data** by checking or unchecking the boxes. The report layout is the information defined by the output type and the customization of the properties in the Step 3 grid. The query data is the actual properties selected.

4. Select where to save the report in the User PAD tree by entering the folder structure in the **Location of Report in PAD** box. To indicate subfolders, separate folder names with a \. For more information about the User PAD Tree, see the section on Managing User-Defined Reports in Chapter Six.

5. Click **Save** to save the report.

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OPENING A QUERY

Two types of queries are available when opening a query. A user can open any query they have personally saved in their list of queries, or a public query can be opened. To open a query:

1. Click the **Open** button at the top of the **Query** screen.

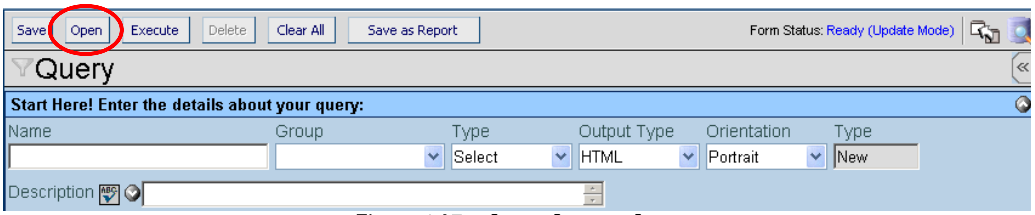

Figure 4.37 – Query Screen, Open

2. The **Query Open** screen opens. The first tab is **My Queries**, which lists all queries the current user has saved. To filter the list of queries, select the **Group** and/or **Type** of query and click the **Filter** button.

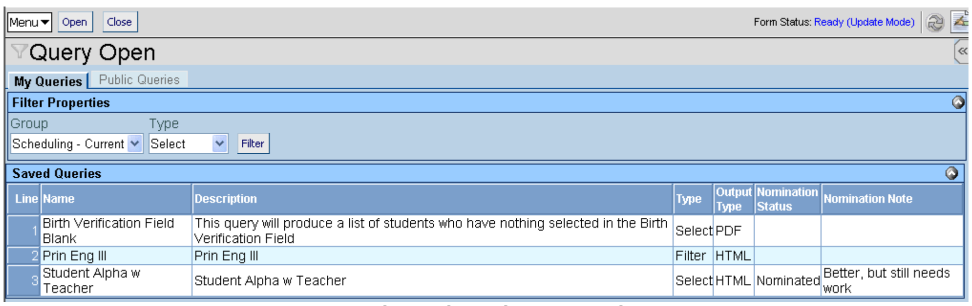

Figure 4.38 – Query Open Screen, My Queries Tab

3. To open a query from the current user, click the query and click the **Open** button.
4. To select a query that has been saved for everyone to use in Synergy SIS, click the **Public Queries** tab.

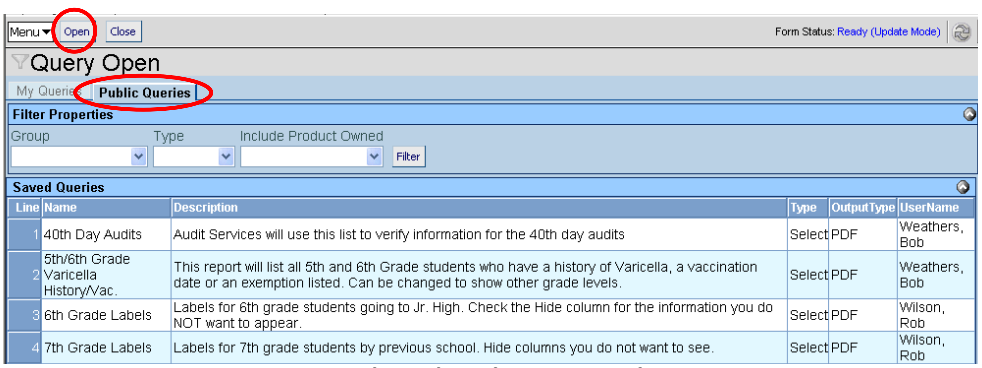

Figure 4.39 – Query Open Screen, Public Queries Tab

5. To filter the list of public queries, select the **Group**, **Type,** and/or **Include Product Owned** and click the **Filter** button.
6. To open a public query, click the query and click the **Open** button.

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DELETING A QUERY

To delete a query from the list of saved queries for the current user:

1. Click the **Open** button at the top of the **Query** screen.

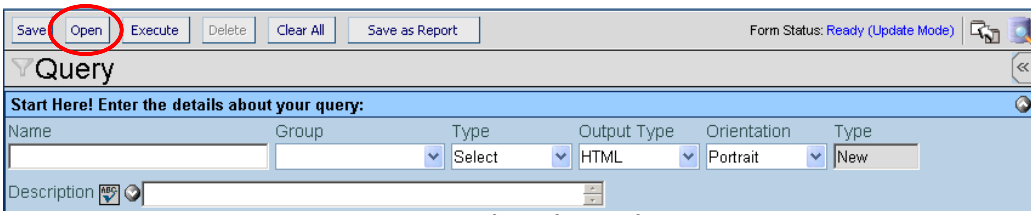

Figure 4.40 – Query Screen, Open

2. The **Query Open** screen opens. Select the query to be deleted from the list of **Saved Queries**, and click the **Open** button.

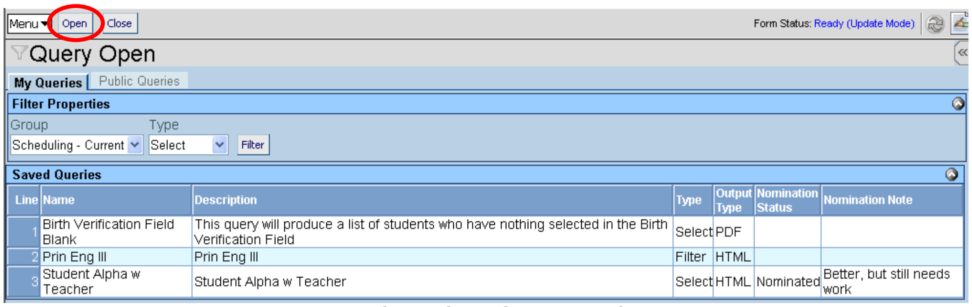

Figure 4.41 – Query Open Screen, My Queries Tab

3. Click the **Delete** button at the top of the **Query** screen.

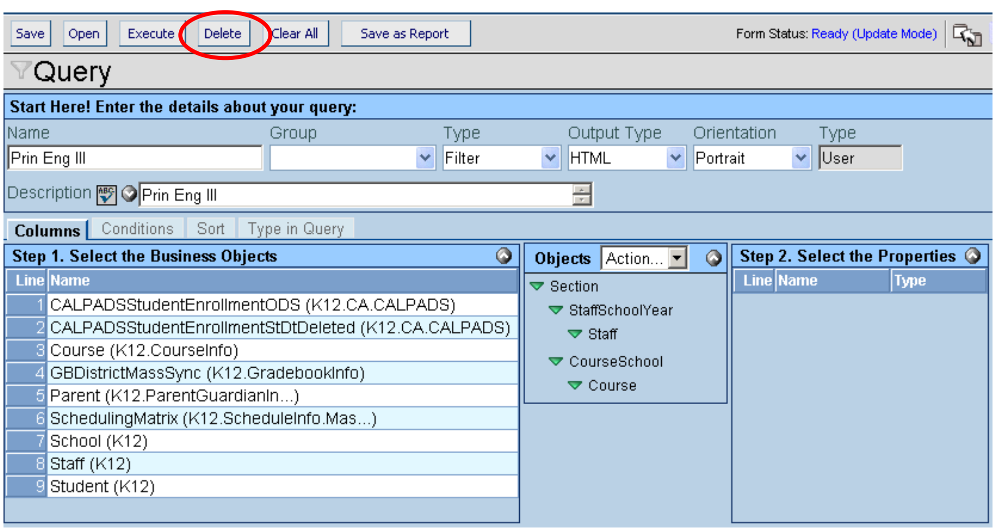

Figure 4.42 – Query Screen, Deleting

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Chapter Five: ADVANCED QUERIES

In this chapter, the following topics are covered:

- ► How to create a query using a Link Field
- ► How to create a query using multiple business objects
- ► What is the Literal property
- ► How to edit the query manually

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CREATING A QUERY USING A LINK FIELD

Queries can be created from multiple business objects by linking the business objects via a common property. The common property is referred to as a Link Field. To create a query from multiple business objects using a link field:

1. In the **Step 1. Select the Business Object** grid, select the business object to be used in the query by clicking the name of the object. Since a limited number of business objects are shown by default, it may be helpful to view all business objects by checking the **Show All Business Objects** box.

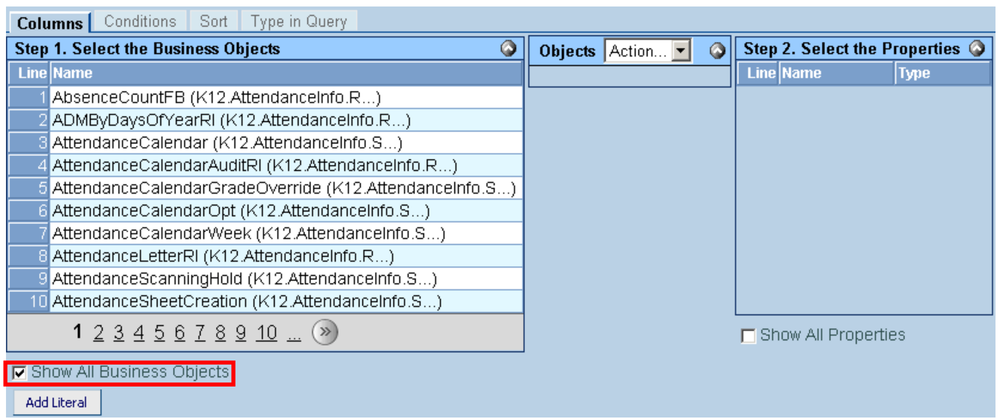

Figure 5.1 – Select the Business Objects

2. The selected object appears in the **Objects** list, and the properties associated with the s object appear in the **Step 2. Select the Properties** grid. Select the properties to be used in the query by clicking the properties. To show all properties associated with this business object, check the **Show All Properties** box.

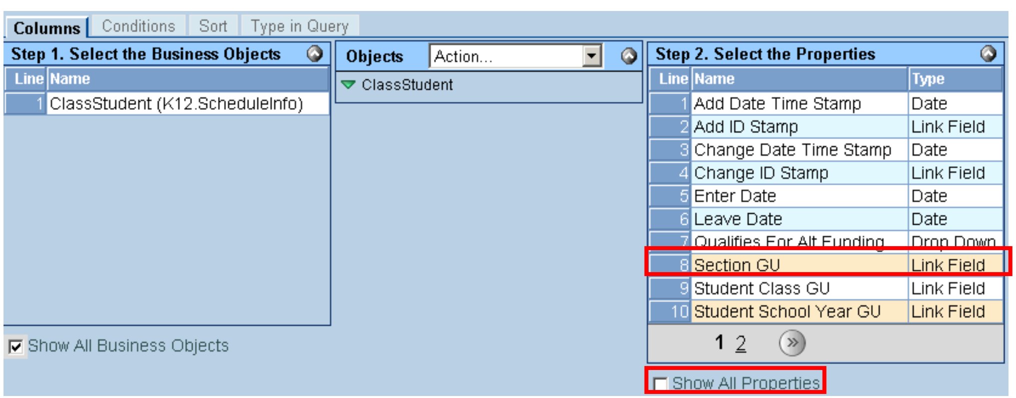

Figure 5.2 – Select the Properties

3. Note that certain properties appear in beige in the list of properties. These are **Link Fields** that link to another business object. In the example shown above, the Link Field links to the Section business object.

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4. When a **Link Field** is clicked and added to the query, the property is added to the Step 3 grid as usual. However, a new business object is also added to the list of objects in the middle of the screen underneath the original business object.

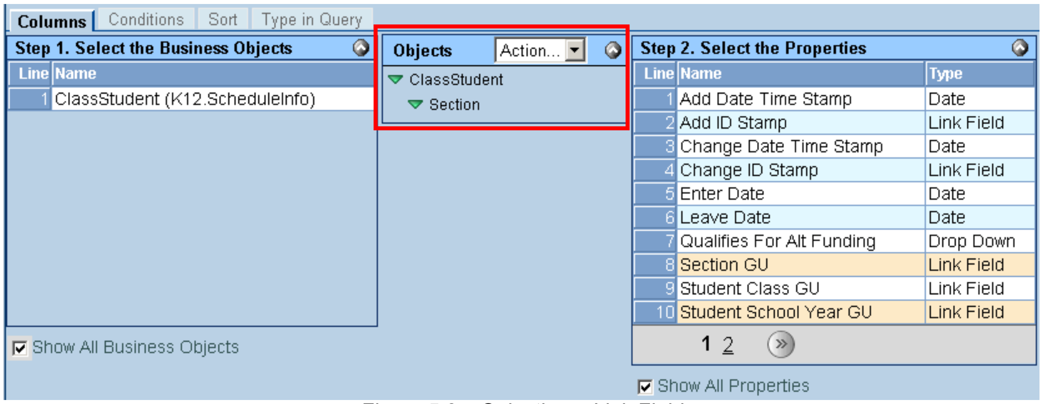


Figure 5.3 – Selecting a Link Field

5. Properties associated with the new business object can be added to the query as well by clicking the new business object in the **Objects** list. The Step 2 grid changes to show the properties for the new business object. These properties can be selected by clicking as usual.

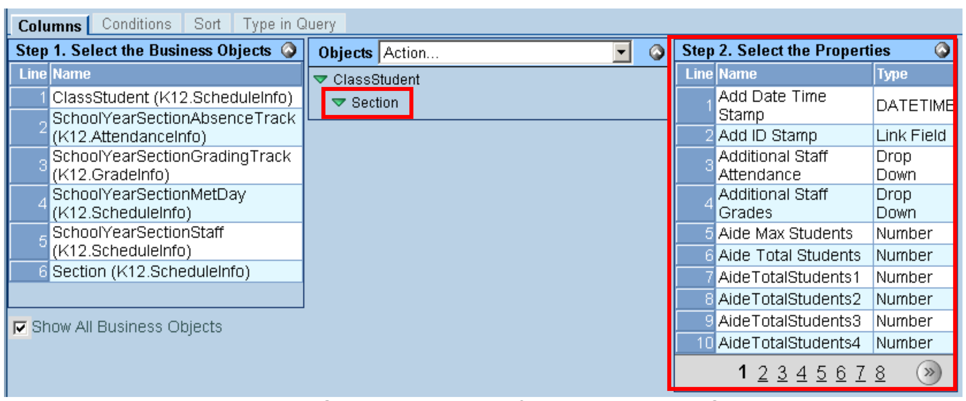


Figure 5.4 – Selecting Properties for a New Business Object

6. To switch back to the list of properties for the original business object, click the first business object in the **Objects** list.

7. To remove a business object from a query, click the business object in the **Objects** list, click the **Action** list, and click **Delete**.

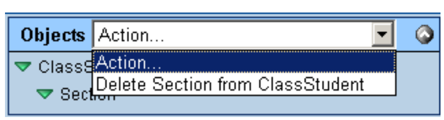


Figure 5.5 – Deleting a Business Object

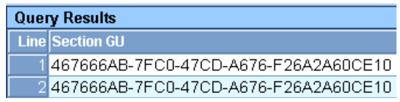
8. When a link field is added to a query, it is strongly recommended to check the **Hide** box to omit it from the query results.

Step 3. Provide any desired property overrides

	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display
☐	1	Section GU (ClassStudent)		1		☑			Default

Figure 5.6 – Step 3 Provide Any Desired Property Overrides Grid

While the field is essential to the query to tie the business objects together, the data contains in the link field is generally a several-digit hexadecimal number that does not add meaning to the results.



Query Results

Line	Section GU
1	467666AB-7FC0-47CD-A676-F26A2A60CE10
2	467666AB-7FC0-47CD-A676-F26A2A60CE10

Figure 5.7 – Link Field Results

Tip: To find the business object and property name for a field on a screen, go to **Synergy SIS > System > User > User** and on the **Security Settings** tab, check the **Show BO on Mouseover** box. The name of the business object and property then displays when you pause your pointer over a field. The business object is the name following K12, and the property is the last part of the string. In the example below, the business object is Student and the property is LastNameGoesBy.

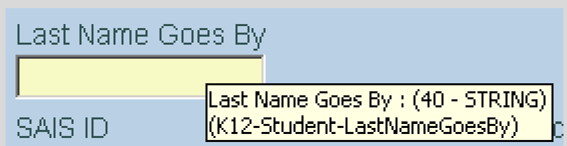


Figure 5.8 – BO on Mouseover

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Creating a Query Using Multiple Business Objects

Queries can also be created from multiple business objects by selecting related objects from Step 1. These objects are still linked in the background by a link field, but the link field is not added to the list of properties. To create a query from multiple business objects using Step 1:

1. In the **Step 1. Select the Business Object** grid, click the business object to be used in the query. Since a limited number of business objects are shown by default, it may be helpful to view all business objects by checking the box **Show All Business Objects**.

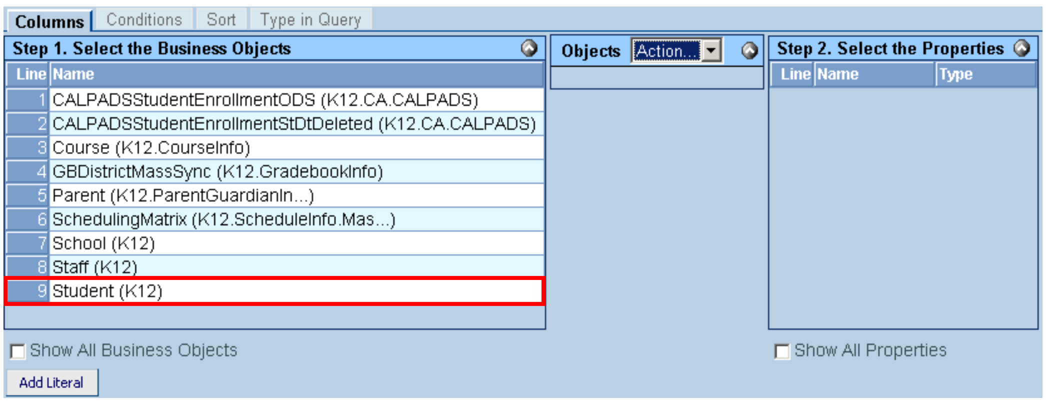

Figure 5.9 – Select the Business Objects

2. The selected object appears in the **Objects** list, and the properties associated with the selected business object appear in the **Step 2. Select the Properties** grid. Select the properties to be used in the query by clicking the properties. To show all properties associated with this business object, check the box **Show All Properties**.

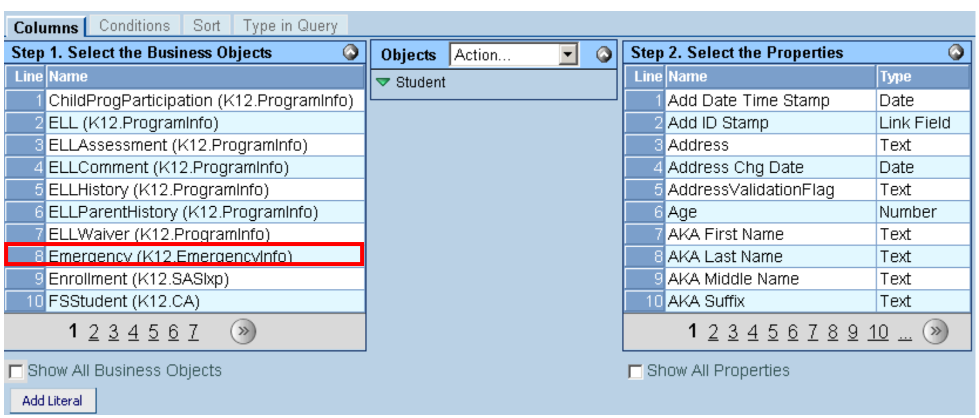

Figure 5.10 – Select the Properties

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3. Note that when the business object was selected, the list of business objects shown in the Step 1 grid changed. This new list of business objects shows all business objects related to the initial business object. To add one of these business objects to the query, click the object in the Step 1 grid. The new business object is added to the list of objects underneath the original business object.

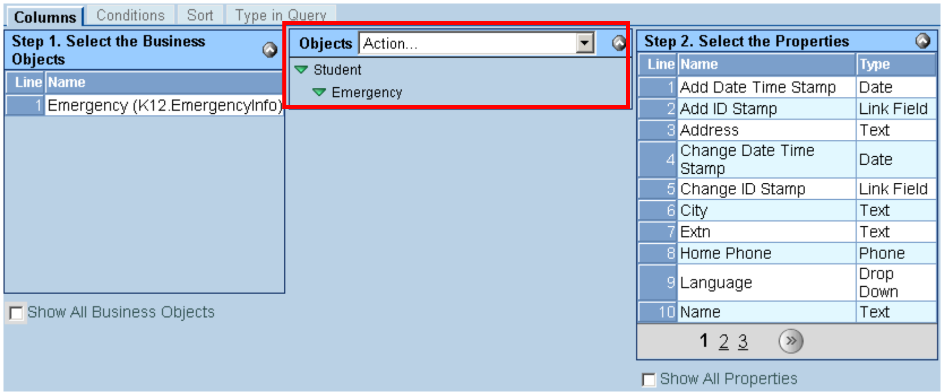

Figure 5.11 – New Business Object Added

4. To add another related business object from the first business object, click the first business object and select another object. If there are related objects to subsequent objects, those can also be added in the same fashion.

5. To remove a business object from a query, click the business object in the **Objects** list, click the **Action** list, and click **Delete**.

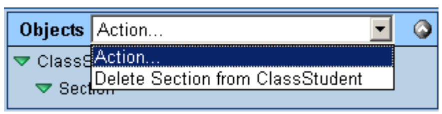

Figure 5.12 – Deleting a Business Object

6. Properties from any object in the **Objects** list can be added to the query by clicking the object in the list and selecting the properties from the Step 2 grid.

Tip: When working with multiple business objects, selecting the initial business object is critical. Not all business objects are linked, so a desired business object may not be available for linking if the incorrect business object is selected first. For example, to create a query with information about a section and the students enrolled in the section, the ClassStudent object or StudentClass object should be selected first and not the Student object.

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THE LITERAL PROPERTY

A special type of property can be added to queries called the Literal property. The Literal property adds a fixed text value as a column to any query. To add a literal property:

1. With at least one object in the **Objects** list, click the **Add Literal** button under the Step 1 grid. A new property line is added to the Step 3 grid.

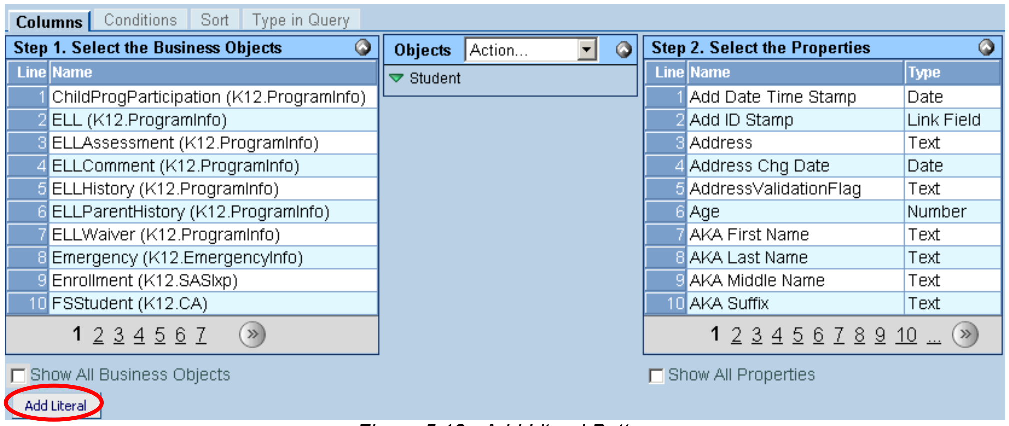

Figure 5.13 –Add Literal Button

2. In the **Name** column, enter the text that will appear in the query results. Modify the rest of the property values as usual.

Figure 5.14 – Editing the Literal Property

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EDITING THE QUERY MANUALLY

Occasionally it may be advantageous to edit a query manually. For example, with a query that has a condition with a date, the date may need to be changed each time the query is run. To edit a query manually:

1. Click the **Type in Query** tab.

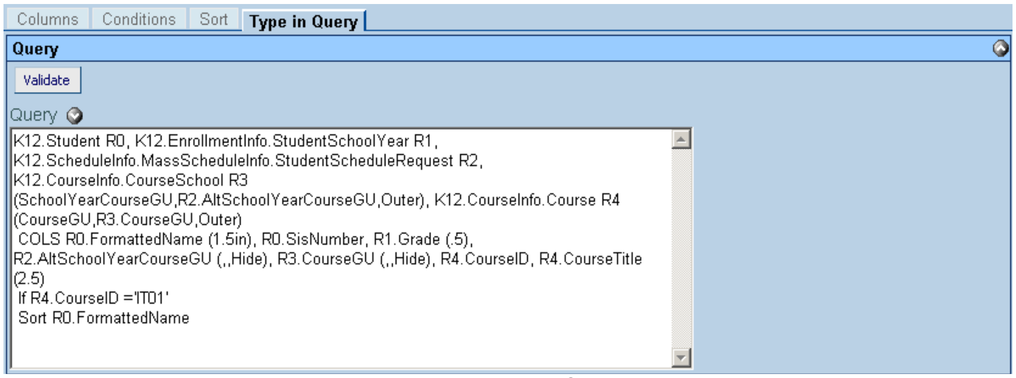

Figure 5.15 – Type in Query Tab

2. In the **Query** box, change the text as necessary. In the example above, the query runs for a specific Course ID. To run the query for a different course, it would be necessary to change the Course ID.
3. Click the **Validate** button to ensure that the query is valid.

In text format, each query has four sections – one defining the business objects, one listing the properties, the conditions, and the sort. The conditions and the sort sections are optional, but every query must have the business objects and properties sections.

The Business Object Section

The format for the business object section is

BusinessObject R#, BusinessObject R# (LinkField,R#LinkField,)

Each business object is assigned a sequential number following the letter R. When the business object is referred to in the rest of the query, it is referred to by the R#.

When a business object is linked to another business object using a Link Field, the business object is following by the names of the link fields which tie the objects together. The first link field is the field in the current business object, and the second link field is the link field from the other business object preceded by its R#

An example of a business object section is:

K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1, K12.ScheduleInfo.Section R2 (SectionGU,R1.HomeroomSectionGU,), K12.Setup.SchoolRoom R3 (RoomGU,R2.RoomGU,)

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The Properties Section

The format for the properties section is:

COLS R#.PropertyName, R#PropertyName (Width,LabelOverride,Hide,GroupBreak,Group#)

The properties section must be preceded by the word COLS. R# indicates the business object from where the property comes.

If any property overrides have been defined for the property, they are listed in the order indicated above in parenthesis following the property name. If a property override is not used, a space is used instead. The Hide override is either blank or the word Hide to turn on the Hide function. The break is GroupBreak, PageBreak, or blank. The Group value is the word Group followed by the number of the group. The Label Override value is surrounded by single quotes.

An example of a properties section is:

COLS R0.FormattedName, R0.BirthVerification (,,Hide), R1.EnterDate, R1.EnterCode, R1.HomeroomSectionGU (,,Hide), R2.RoomGU (,,Hide), R3.RoomName (.1,'GU',Hide,GroupBreak,Group1)

The Conditions Section

The format for the properties section is:

IF R#.PropertyName Operator Value AND R#.PropertyName Operator Value

Operators can be In, Start/StartsWith, Contain/Contains, End/EndsWith, =, <, >, <=, >=, !=, <>, or NOT. The condition groups are indicate with AND/OR. Values are surrounded with single quotes. Parentheses are used to group nested conditions.

An example of a conditions section is:

If R4.CourseID ='IT01'

The Sort Section

The format for the properties section is:

Sort R#.PropertyName, R#.PropertyName Desc

The section always starts with Sort. The properties are listed in the order in which they are sorted, separated by commas. The sort is ascending unless followed by Desc.

An example of a sort section is:

Sort R0.FormattedName

A quick refresher guide on the format for queries is also available in the **Query Guide** section at the bottom of the **Type in Query** tab.

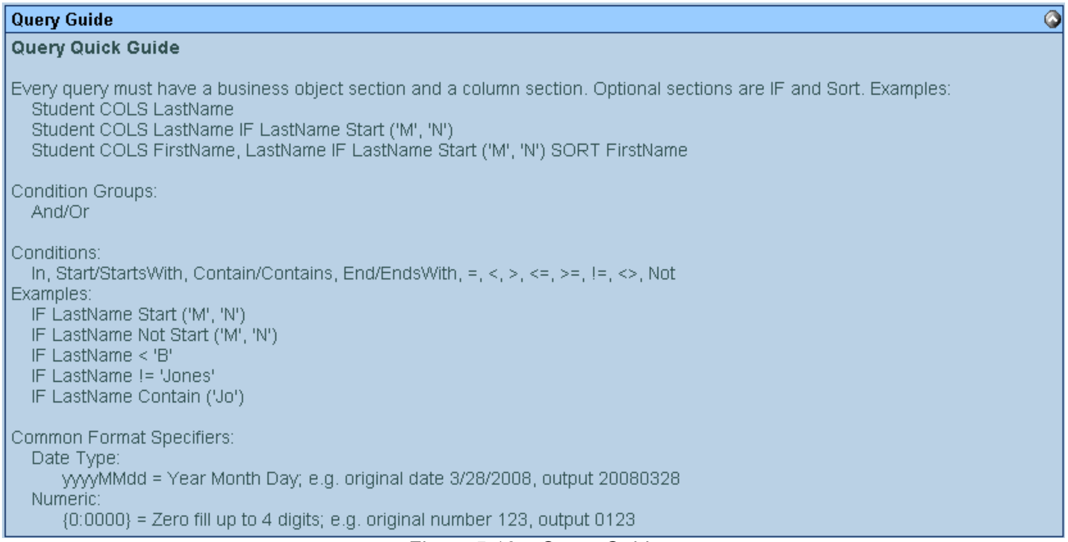

Figure 5.16 – Query Guide

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Chapter Six:
QUERY & JOB QUEUE ADMINISTRATION

In this chapter, the following topics are covered:

- How to manage jobs in the Job Queue
- How to set up Query groups
- How to manage Public Queries
- How to manage User-Defined Reports

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JOB QUEUE

Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in **Synergy SIS > System > Job Queue > Job Queue Viewer** and **Synergy SIS > System > Job Queue > Job Q Adm Viewer**. The **Job Queue Viewer** lists all jobs submitted by the user currently logged in to Synergy SIS, and the **Job Q Adm Viewer** lists all jobs regardless of user. Both allow the jobs to be deleted, the results of the job to be printed, and the details of the job to be viewed.

In the **Job Queue Viewer**, each job is listed with the date and time the job was submitted, and the date and time the job completed. The state of the job is also indicated by an icon, as shown below:

 Waiting

 In Progress

 Completed

 Error

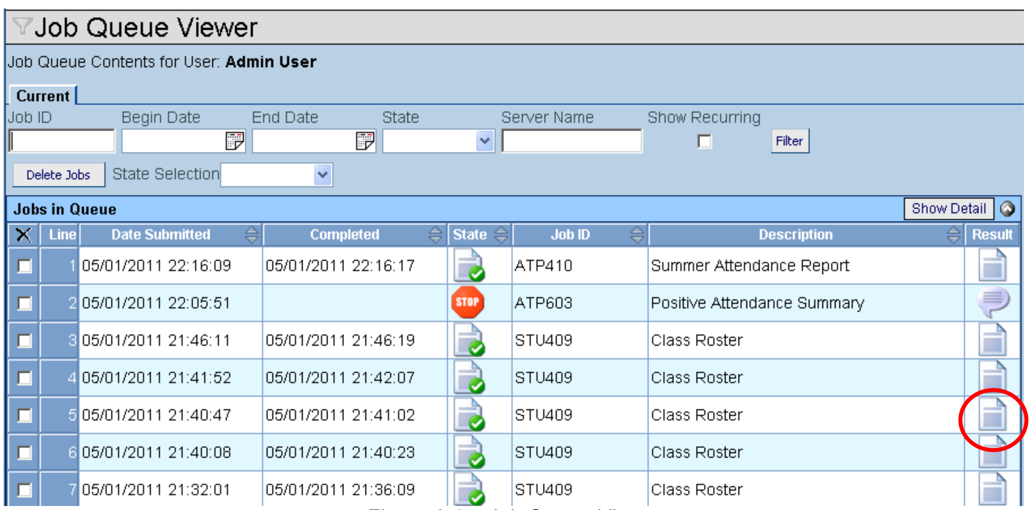

Figure 6.1 – Job Queue Viewer

The **Job ID** and **Description** are also listed. For reports, this is the report ID and the name of the report.

To view the result of the job, click the icon in the **Result** column. The results opens in a new window, generally in PDF format.

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For jobs still in progress, clicking the **Result** icon brings up the **Job Status** screen.

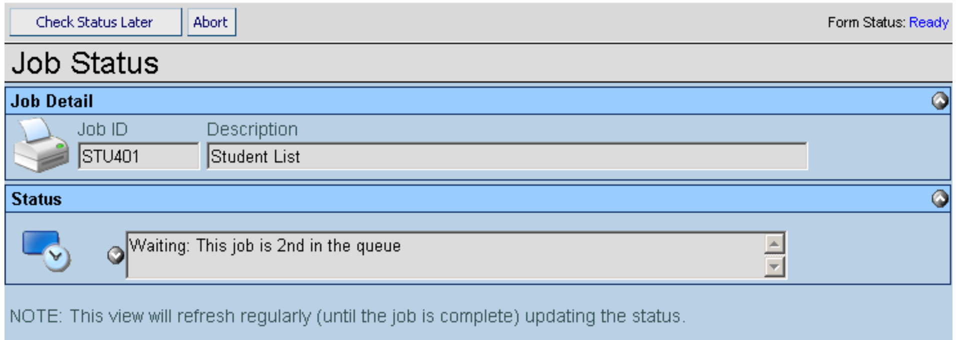

Figure 6.2 – Job Status Screen

On the **Job Status** screen, you can cancel the job by clicking the **Abort** button. Clicking the **Check Status Later** button closes the **Job Status** screen, but the job and its results can still be viewed from the **Job Queue Viewer** screen.

To delete a job from the queue, check the box in the **X** column and click the **Save** button at the top of the screen. To delete all the jobs in a particular state, select the state from the **State Selection** list and click the **Delete Jobs** button.

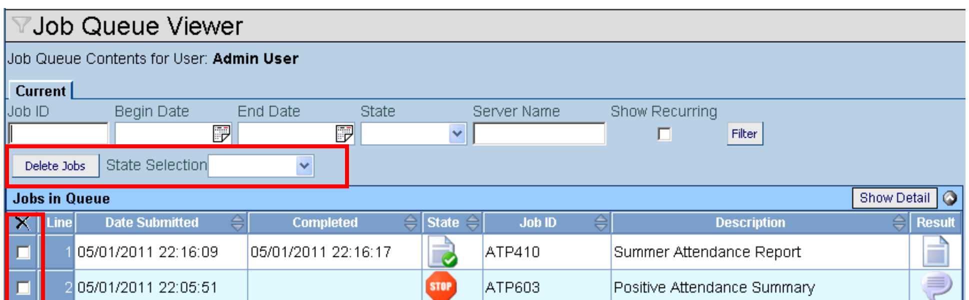

Figure 6.3 – Job Queue Viewer, Deleting Jobs

To filter the list of jobs displayed, enter the criteria by which to filter and click the **Filter** button. Criteria include all or part of the **Job ID**, a range of dates from **Begin Date** to **End Date**, the **State** of the job, and the **Server Name** of the process server used to process the job. To show reoccurring jobs in the list, check the **Show Recurring** box.

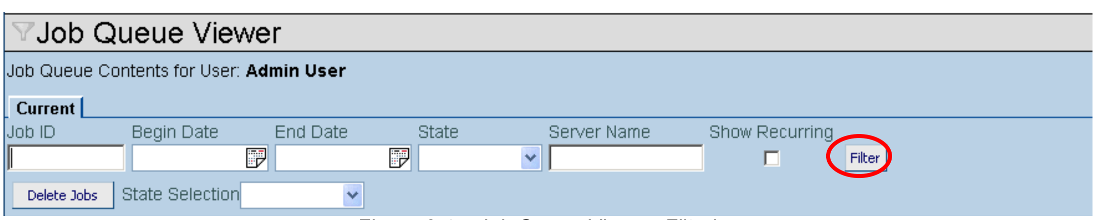

Figure 6.4 – Job Queue Viewer, Filtering

Additional information is available about each job by clicking the **Show Detail** button.

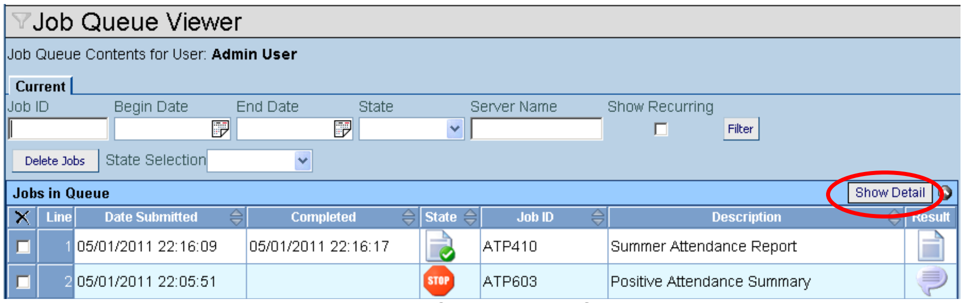

Figure 6.5 – Job Queue Viewer, Show Detail

The detailed information about each job appears to the right. To switch to another job, click the **Line** number of that job. The detail area has four tabs:

- In addition to the information shown in the main screen, the **Details** tab shows the **Result Type**, the **Job Type**, the **Date Processed**, the **Total Execution Time**, and the **Focus** from which the job was run.

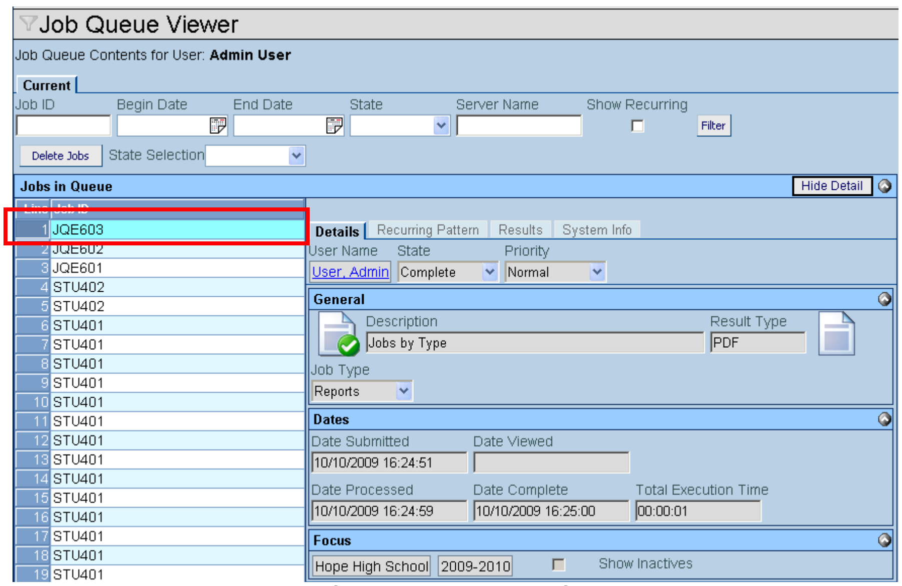

Figure 6.6 – Job Queue Viewer, Detailed Screen, Details Tab

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- The **Recurring Pattern** tab shows the details of the schedule of any reoccurring jobs.

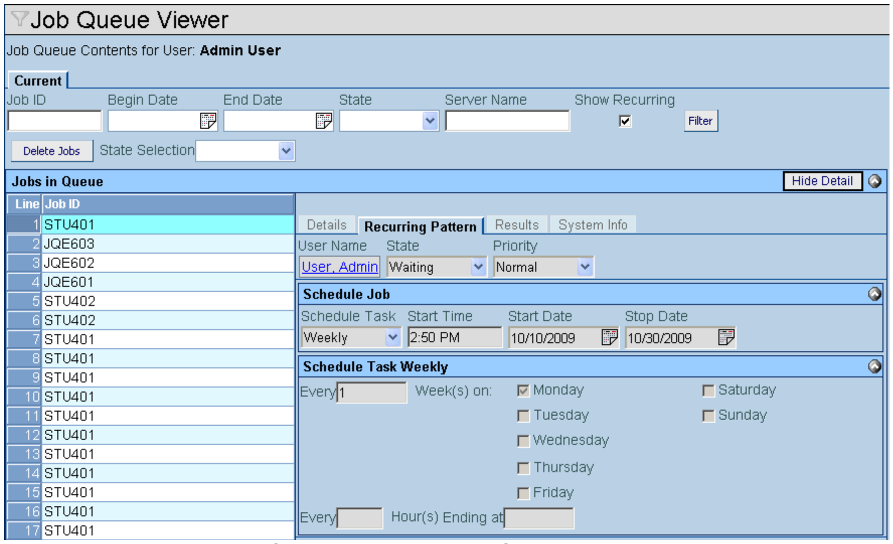

Figure 6.7 – Job Queue Viewer, Detailed Screen, Recurring Pattern Tab

- The **Results** tab enables you to view the results of the job by clicking the icon, just as on the main screen. To have the results display prompt to save or open the results file, check the **Force Download Prompt** box.

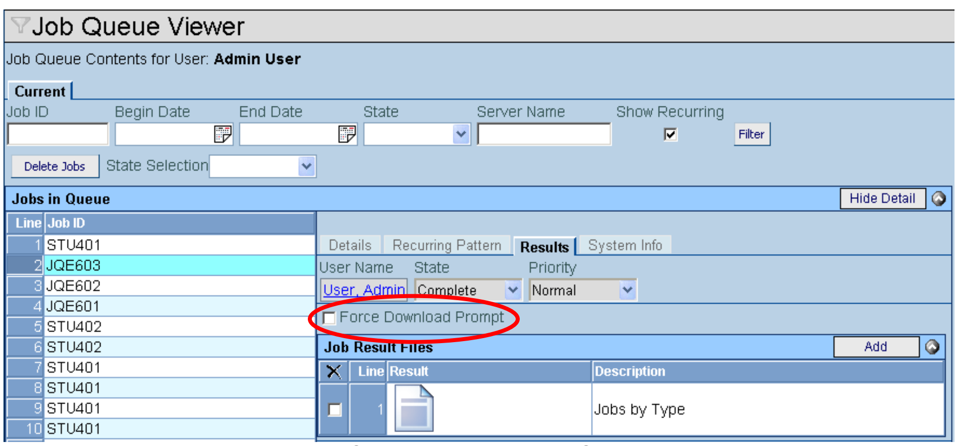

Figure 6.8 – Job Queue Viewer, Detailed Screen, Results Tab

- The **System Info** tab shows the name of the process server used to process the job. If the job is still in progress, the **Progress** field shows how much has been processed. If the job encountered an error, the top part of the error message is displayed in the **Progress Message** field. The **Process Queue GU** and **Job Primary BO** are for developers, and show the ID of the job in the process queue and the primary business object for the job.

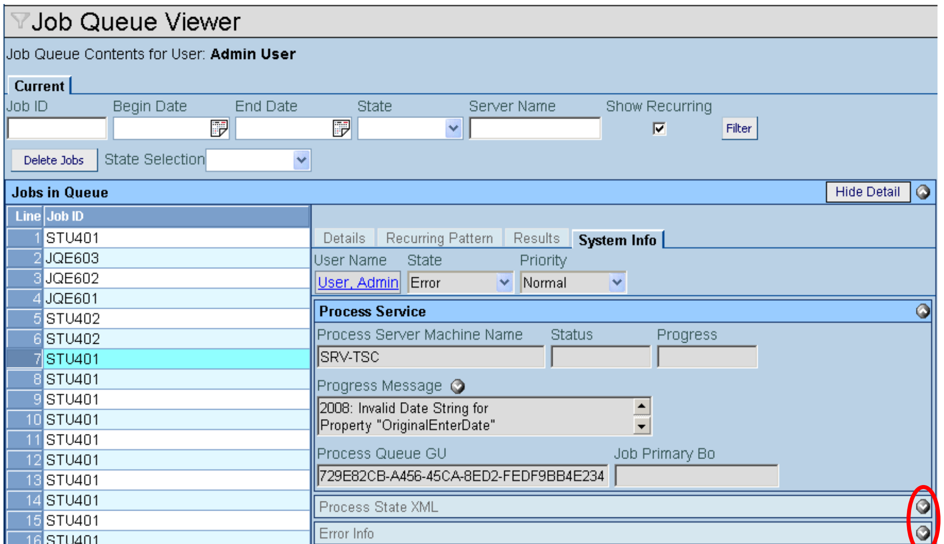

Figure 6.9 – Job Queue Viewer, Detailed Screen, System Info Tab

Additional information can be seen by clicking the Maximize buttons for the **Process State XML** and **Error Info** sections.

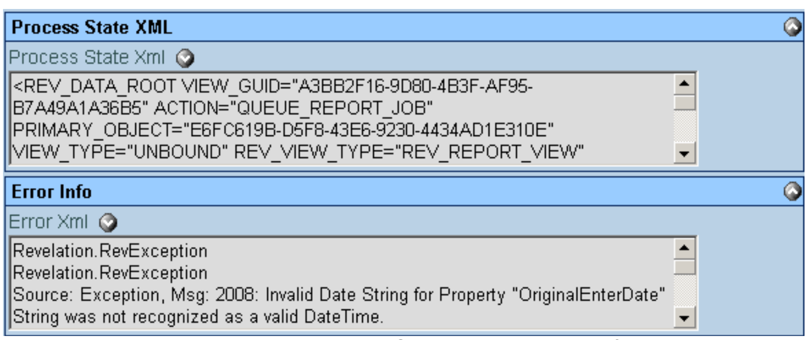

Figure 6.10 – Process State XML and Error Info

The **Process State XML** is more information for developers. The **Error Info** section shows the full text of the error message.

To close the detail area, click the **Hide Detail** button.

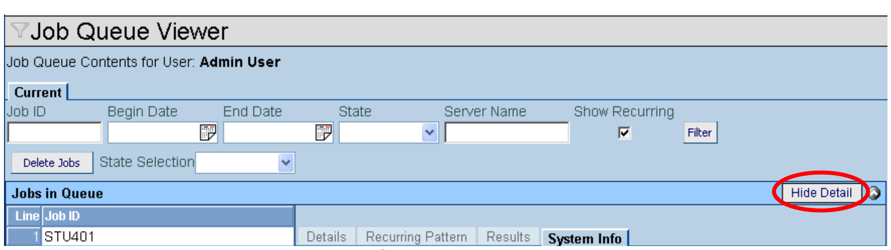

Figure 6.11 – Job Queue Viewer, Hide Detail button

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JOB QUEUE ADMIN

The Job Queue is administered from the **Job Q Adm Viewer** screen. This screen has all of the same functionality and features of the **Job Queue Viewer** screen. However, all jobs from all users are listed. In addition, the **Job Q Adm Viewer** enables you to adjust the priority of each job.

The main purpose of the admin viewer is to diagnose problems with the queue and to adjust the status of jobs waiting in the queue. When users report that the job is listed 2nd, 3rd, 4th, and so on in the **Job Status** screen, there may be a problem with the job queue.

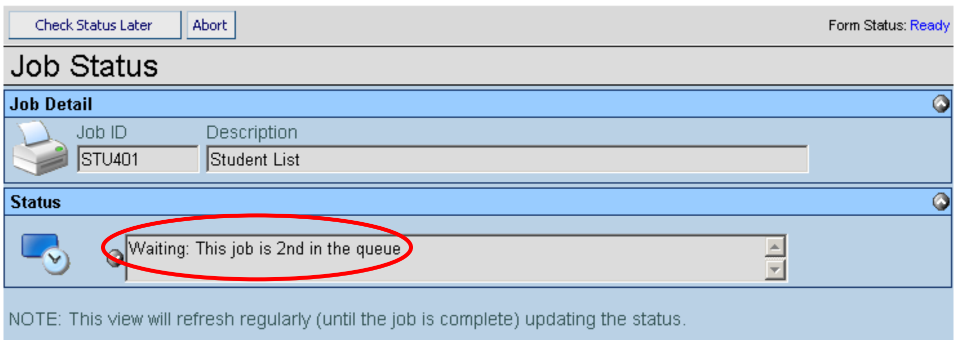

Figure 6.12 – Job Status Screen

When viewed from the admin viewer, three additional columns of information about jobs are listed: the **Priority**, the **Process Server Machine Name**, and the **User Name**.

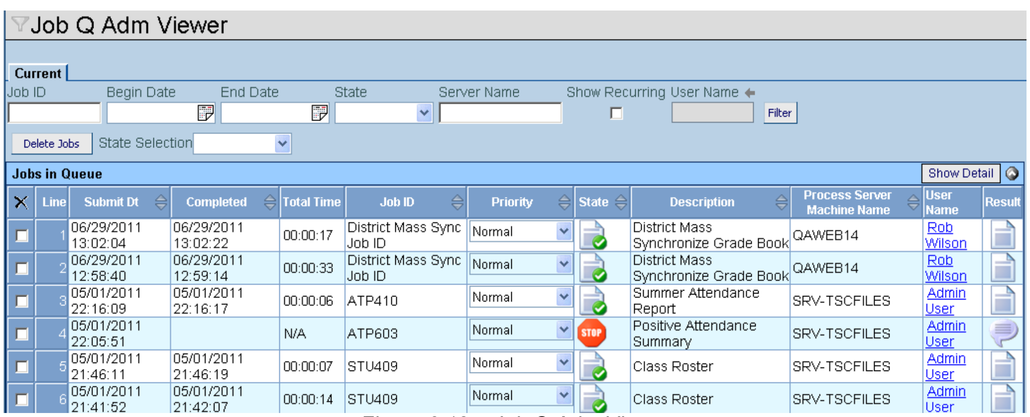

Figure 6.13 – Job Q Adm Viewer

When a job is submitted by a user, it has the priority of **Normal**. If a job is still waiting that may delay the queue, the priority of the job can be switched to **Low** to allow later jobs with a priority of **Normal** to finish first. If there is an urgent job waiting, its priority can be switched to **High** to set that job to process next.

You can filter jobs by user by clicking the gray arrow next to the **User Name** field and selecting the user. All other functions are the same as the **Job Queue Viewer**.

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CONFIGURING QUERY GROUPS

On the **Query** screen is a **Group** list. The values in this list are stored in a lookup table that you can modify using the **Lookup Table Definition** screen. Before creating queries in the **Query** screen, these values should be entered. These groups are also used by the **Dashboard Control** screen to categorize widgets. To modify the lookup table's values:

1. Go to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Under **Lookup Table Maintenance**, click **Revelation.QueryInfo** and then **Group**.

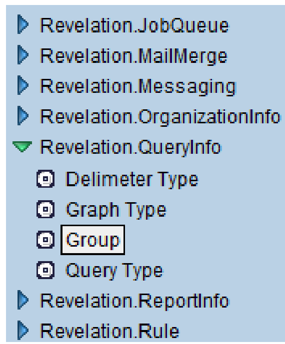

Figure 6.14 – Lookup Table Definition Screen

3. In the **Group** table, click the **Add** button to add a new code.

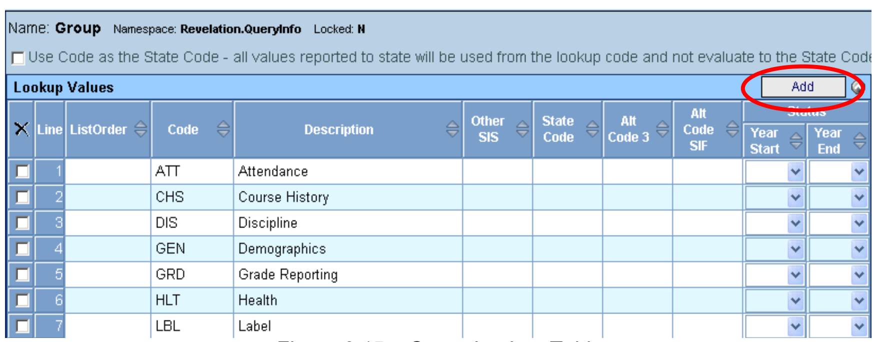

Figure 6.15 – Group Lookup Table

4. Set the order in which values are displayed by entering numbers in the **ListOrder** column. If the numbers in the ListOrder field are the same or are all blank, the **Code** is used to sort the list, and then the **Description**.
5. Enter a code for the item in the **Code** column. This value must be unique.
6. Enter the description of the code in the **Description** column.
7. The **Other SIS** column is used to import data during the conversion process from another student records system. Enter the code used in the old system in this column.
8. If appropriate, enter a start date and end date for the code in the **Status** column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is no longer available for selection for new records. For example, if a code is no longer valid for records beginning FY2014, select 2014 for the end year.

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9. The **State Code**, **Alt Code 3, and Alt Code SIF** are not needed, since this information is not uploaded to the state. The **Use Code as the State Code** check box at the top of the table is also not used.
10. Click the **Save** button at the top of the screen.

MANAGING PUBLIC QUERIES

When users create queries that might be useful for all Synergy SIS users, they can nominate them to be shared with everyone as public queries. To manage the public queries and review the nominated queries, use **Synergy SIS > Query > Query Admin**.

The **Public Queries** tab lists all queries that have been approved for the public queries list. For each query, the following information is listed and can be edited:

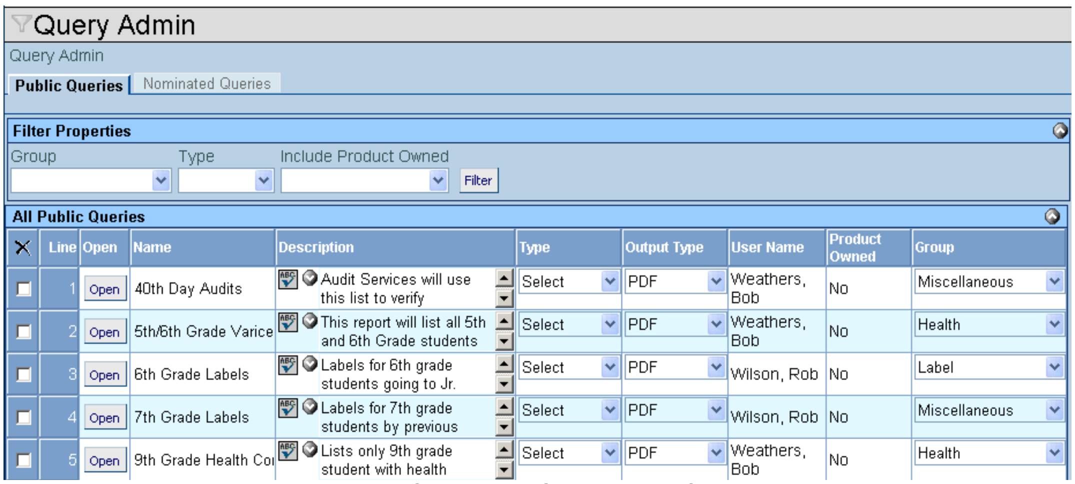

Figure 6.16 – Query Admin Screen, Public Queries Tab

1. To review the query, click the **Open** button. The query opens in the **Query** screen.
2. Close the **Query** screen to return to **Query Admin**.
3. Edit the **Name** and **Description** of the query by typing in the boxes. The description often includes special instructions on how to customize the report before running it.
4. Do **NOT** change the **Type** of query unless you are an expert user and have good reason for doing so.
5. Change the **Output Type** if desired.
6. Skip the **User Name**, which cannot be changed.
7. If the query came with Synergy SIS and cannot be changed, the **Product Owned** column shows **Yes**. User-created queries are **No**. This cannot be changed.
8. The **Group** is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in this chapter.
9. Click the **Save** button at the top of the screen.

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The list of queries can also be filtered to just show queries matching a specified **Group** and/or **Type**. The list can also be filtered by whether the query is **Product Owned**. To apply a filter, select the filter to apply and click the **Filter** button.

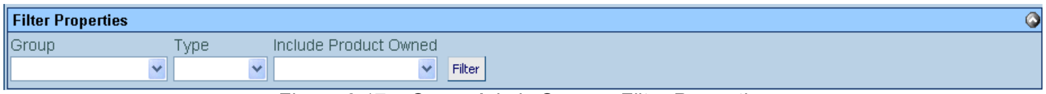

Figure 6.17 – Query Admin Screen, Filter Properties

To delete a public query, click the box in the **X** column next to the query and click the **Save** button at the top of the screen.

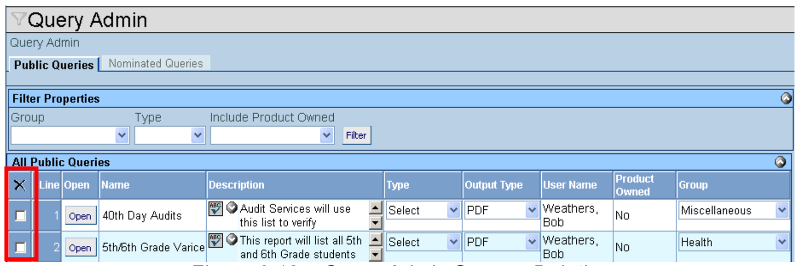

Figure 6.18 – Query Admin Screen, Deleting

To approve or reject queries that have been nominated for public:

1. Click the **Nominated Queries** tab.
2. To filter the list of queries shown, select the **Group** and/or **Type** and click the **Filter** button.

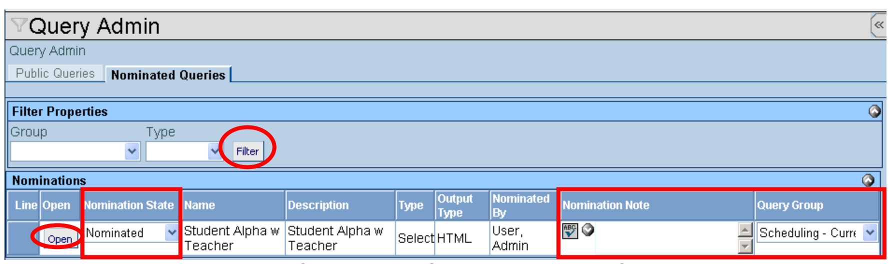

Figure 6.19 – Query Admin Screen, Nominated Queries Tab

3. To review a query, click the **Open** button. The query opens in the **Query** screen.
4. Close the **Query** screen to return to **Query Admin**.
5. Before approving or rejecting the nominated query, you can change the group to which the query is assigned by using the **Query Group** list.
6. Add a note regarding the nomination, if desired, by typing in the **Nomination Note** field. The note could indicate that the query needs more work before acceptance, or the reason why the query was rejected.
7. To approve or reject the query for the public queries, select either **Approved** or **Rejected** in the **Nomination State** column. Once approved or rejected, the query is removed from the list of nominated queries. The note and group can be changed and saved without changing the nomination state.

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8. Click the **Save** button to save the changes. The **Nomination Note** and **Nomination State** appear in the user's **Query Open** screen. If the query was approved, it appears in the list of public queries. If it was rejected, it still appears in the user's list of queries but it does not appear in the **Query Admin** screen.

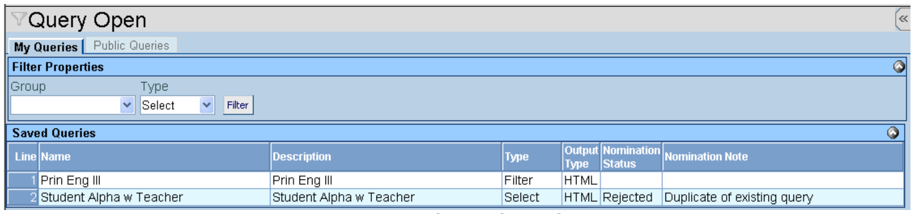


Figure 6.20 – Query Open Screen

Managing User-Defined Reports

As users create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Chapter Four), the folder structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree) can require maintenance. The UD PAD tree is located above the Synergy SIS and Synergy SE folders in the Navigation Tree. The name of the top-level folder is the abbreviation of the district name (in the example below, ESD for Edupoint School District), and cannot be changed. This abbreviation is taken from the Locale as defined in the license key (USA.AZ.District Abbreviation). The folders and reports underneath this folder are created when a user saves a query as a report.

Figure 6.21 – UD PAD Tree

To edit and manage these folders and reports:

1. Go to **Synergy SIS > System > Setup > UD PAD Definition**.
2. Click triangles to expand nodes in the **User Pad Tree** section as needed.

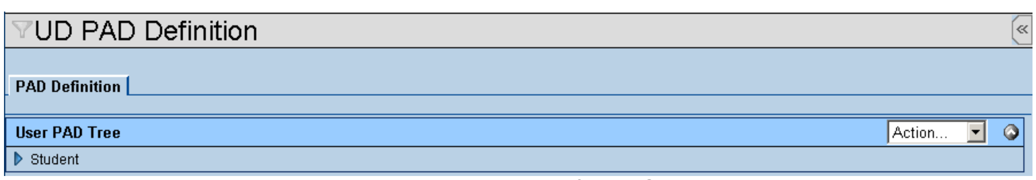
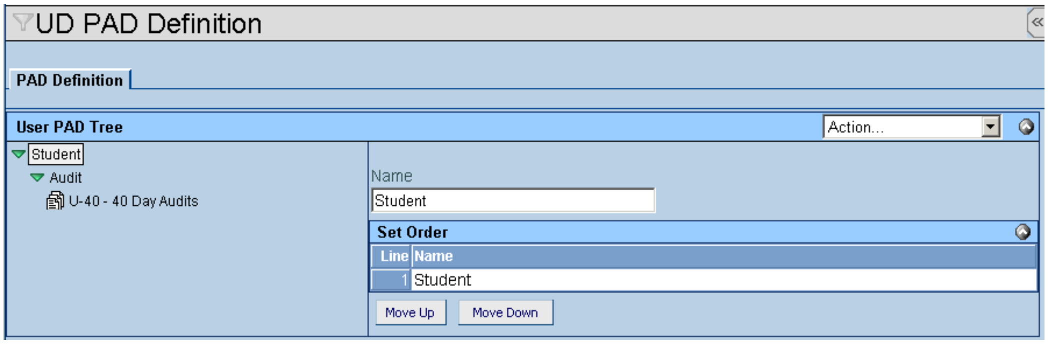


Figure 6.22 – UD PAD Definition Screen

3. To modify an object, click its name.



4. Edit the object's name in the **Name** box.
5. To move the object up or down in the tree, click the **Move Up** or **Move Down** button.
6. To add another object, click the **Action** list and choose **Add Group to FOLDERNAME**.

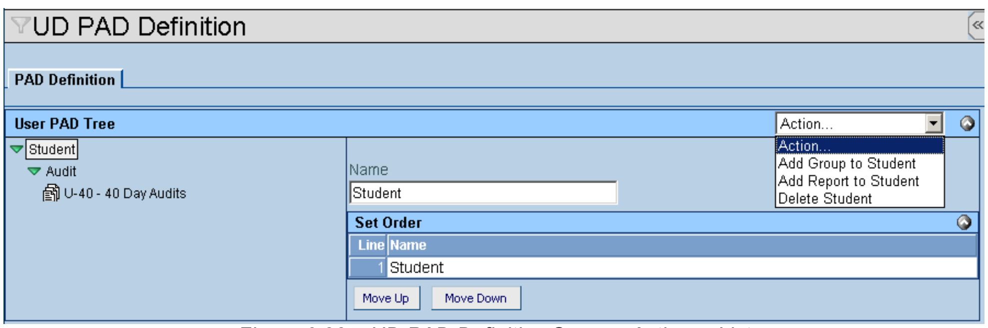


Figure 6.23 – UD PAD Definition Screen, Action… List

7. The **Add Module to UD Navigation Tree** screen opens. Enter the name of the new folder in the **Name** box, and click the **Save** button.

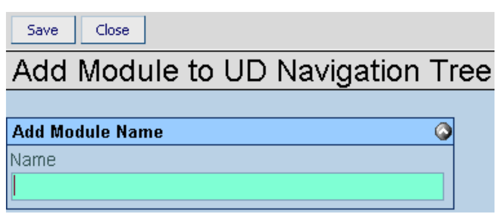


Figure 6.24 – Add Module to UD Navigation Tree

8. To add another report to the folder, click the **Action** list and choose **Add Report to FOLDERNAME**.

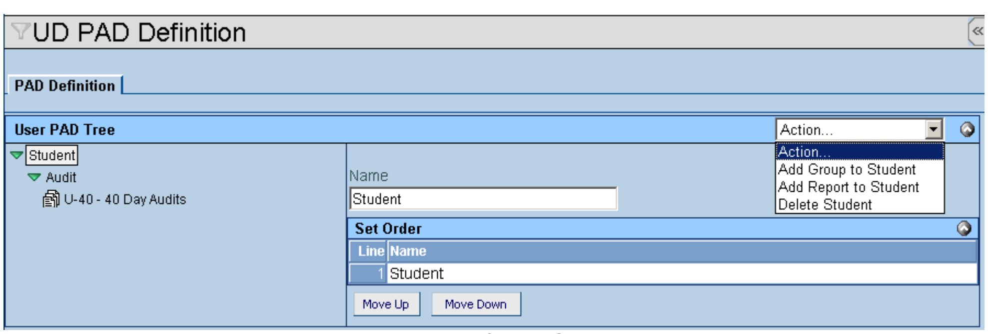


Figure 6.25 – UD PAD Definition Screen, Action… List

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9. The **Add Report to UD Navigation Tree** screen opens. Select the report to add from the **UD Reports** list. Only previously saved user-defined reports are listed. Click the **Save** button to add the report to the tree.

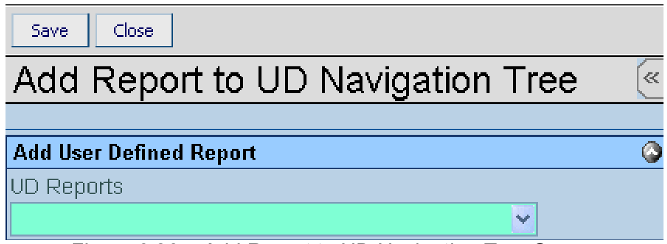


Figure 6.26 – Add Report to UD Navigation Tree Screen

10. To delete the folder, click the **Action…**list and choose **Delete FOLDERNAME**. A box opens to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder.

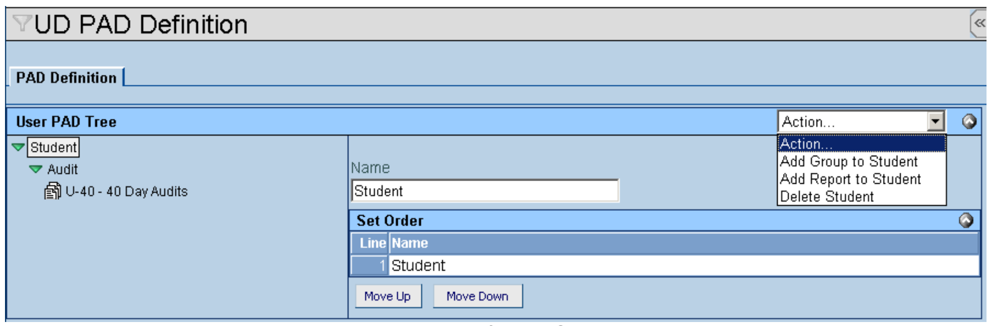


Figure 6.27 – UD PAD Definition Screen, Action… List

11. To delete the folder, click **OK**.
Refresh the screen when done to see the new folder structure.

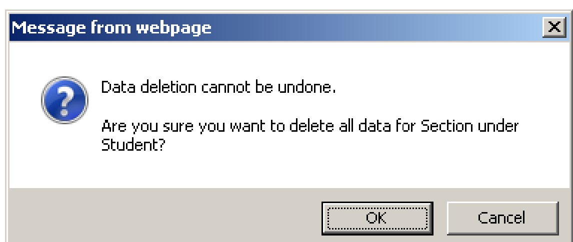


Figure 6.28 – Confirming Folder Deletion

12. To modify a report, click the report to modify. On the right -side of the screen, edit the name of the report in the **Name** box. The **Report ID** can also be edited.

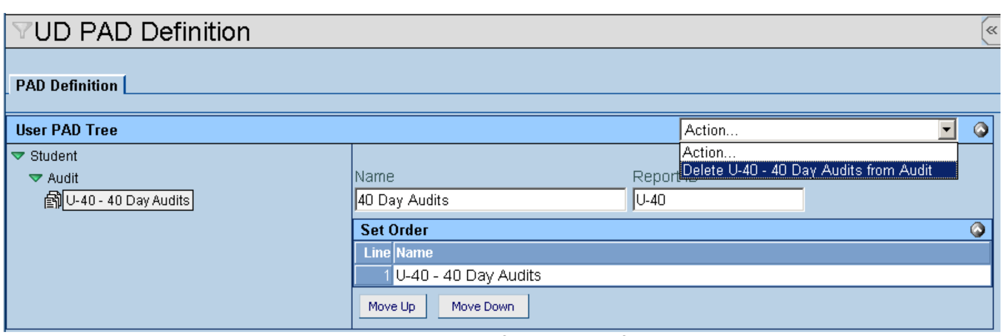


Figure 6.29 – UD PAD Definition, Modifying a Report

13. To move the report up or down in the tree, click the **Move Up** or **Move Down** button.
14. To delete the report, click the **Action** list and choose **Delete REPORTNAME**. A box opens to confirm the deletion.
15. To delete the report, click **OK**.
    Refresh the screen when done to see the new folder structure.

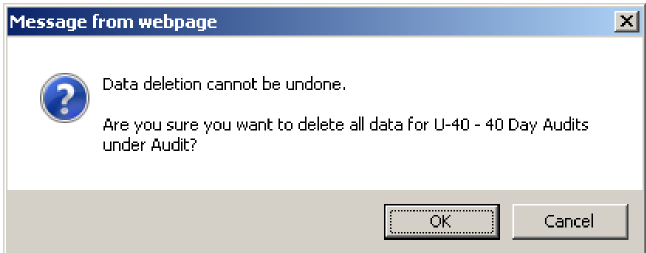
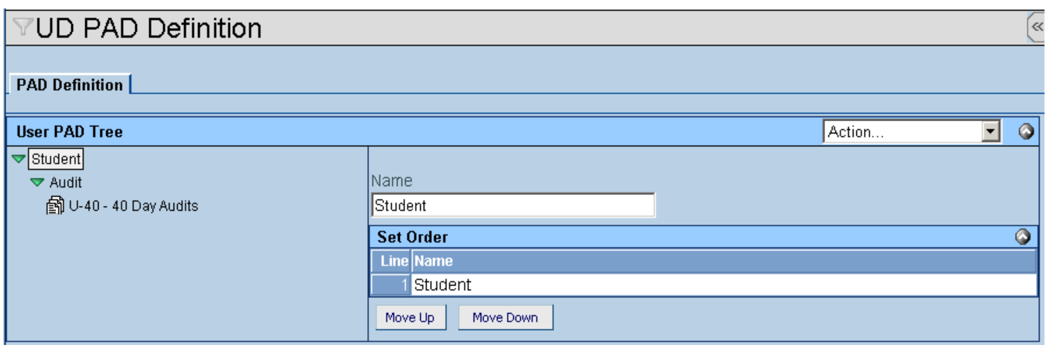


Figure 6.30 – Confirming Report Deletion

16. Click the **Save** button at the top of the screen.

To define filters and fields on the report interface:

1. Go to **Synergy SIS > System > Data and Views > Report Interface Change**.
2. To modify a folder, click the folder name. On the right-side of the screen, the name of the folder can be modified by editing the text in the **Name** box.



3. To move the folder up or down the tree, click the **Move Up** or **Move Down** buttons.
4. To add another folder underneath the folder, click the **Action** list and choose **Add Group to FOLDERNAME**. The **Add Module to UD Navigation Tree** screen opens.

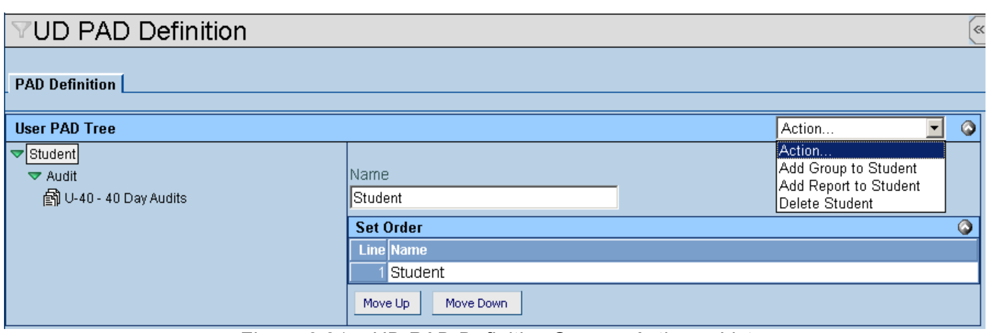


Figure 6.31 – UD PAD Definition Screen, Action… List

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5. Enter the name of the new folder in the **Name** box, and click the **Save** button.

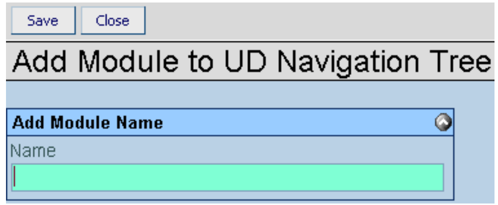

Figure 6.32 – Add Module to UD Navigation Tree

6. To add another report to the folder, click the **Action** list and choose **Add Report to FOLDERNAME**. The **Add Report to UD Navigation Tree** screen opens.

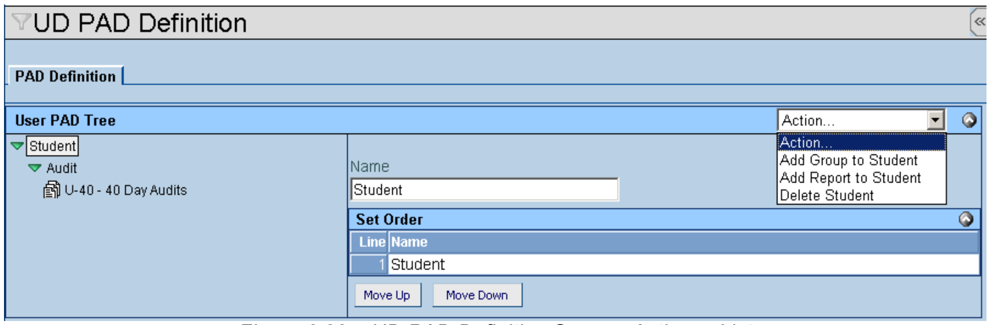

Figure 6.33 – UD PAD Definition Screen, Action… List

7. Select the report to add from the **UD Reports** list. Only previously saved user-defined reports are listed. Click the **Save** button to add the report to the tree.

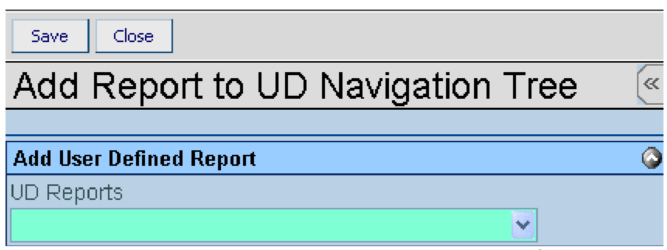

Figure 6.34 – Add Report to UD Navigation Tree Screen

8. To delete the folder, click the **Action** list and choose **Delete FOLDERNAME**. A box opens to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder.

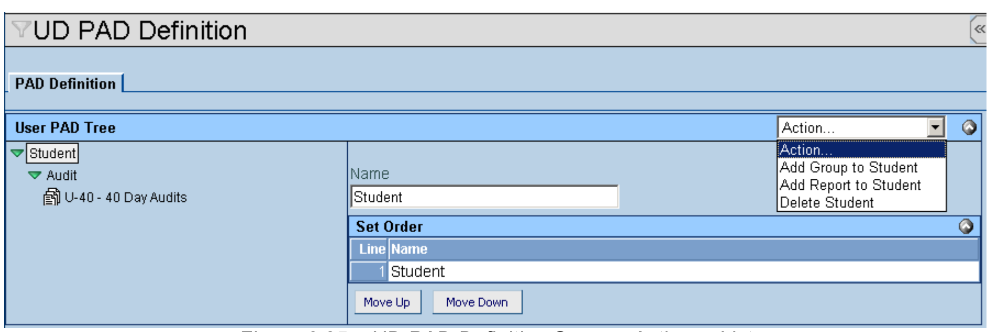

Figure 6.35 – UD PAD Definition Screen, Action… List

9. To delete the folder, click **OK**.
   Refresh the screen when done to see the new folder structure.

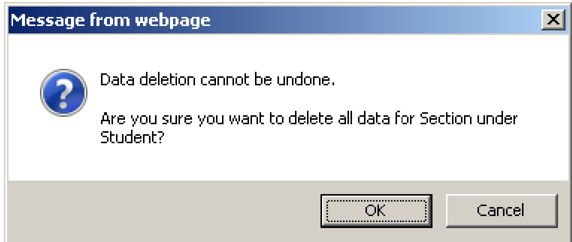

Figure 6.36 – Confirming Folder Deletion

10. To modify a report, click the report to modify. On the right-side of the screen, the name of the report can be modified by editing the text in the **Name** box. The **Report ID** can also be edited.

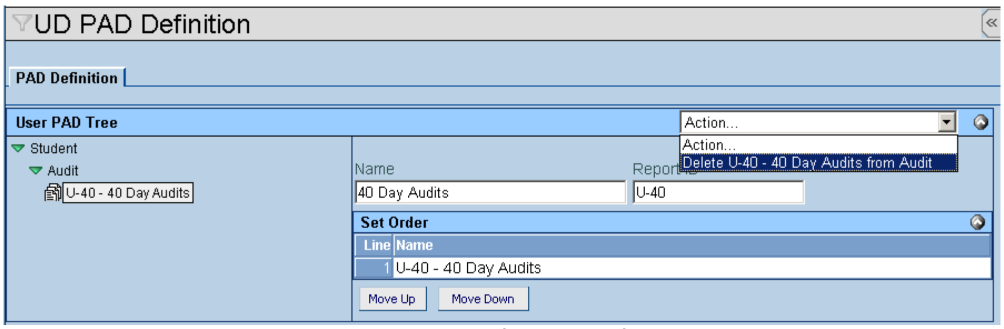

Figure 6.37 – UD PAD Definition, Modifying a Report

11. To move the report up or down the tree, click the **Move Up** or **Move Down** buttons.
12. To delete the report, click the **Action…**list and choose **Delete REPORTNAME**.
13. A box opens to confirm the deletion. To delete the report, click **OK**. ***Refresh the screen when done to see the new folder structure.***

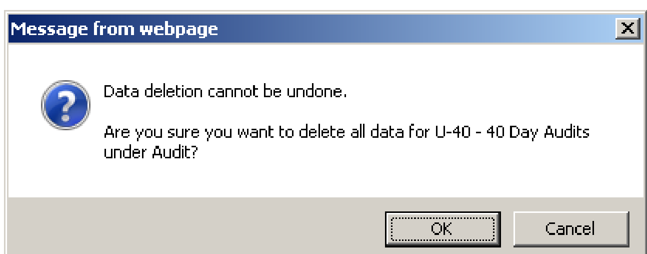

Figure 6.38 – Confirming Report Deletion

14. Click the **Save** button at the top of the screen.

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Chapter Seven: JOB QUEUE REPORTS

In this chapter, the following topics are covered:

- ► What are the available Job Queue reports
- ► How to customize the reports before printing

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Available Reports

Reports for the Job Queue are found under **Synergy SIS > System > Job Queue > Reports > Summary**.

Click the name of a report to open its interface and select the options to be used in printing the report.

Once the report options have been set, click the **Print** button. The report is printed as a PDF to the screen, which can then be sent to the printer.

Reference: This chapter covers only the customizations specific to each of the reports used in Job Queue. The options available on the other tabs are explained in Chapter Two.

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JQE601 - JOB QUEUE EXECUTION TIMES

The Job Queue Execution Times report lists the amount of time it took to process each of the jobs listed in the queue. For each amount of time, it shows the number of jobs that took that long to process in the **Count** column and the percentage of jobs that represents in the **Overall** column. For example, in the first line of the report below, 87 jobs took less than 1 second to process (00:00:00), which represents 7.08% of all jobs. The threshold represents what percentage of jobs processed in that amount of time or less. For example, in the report below, 80% of the jobs processed in 15 seconds or less.

Hope High School
Job Queue Execution Times

Year: 2009-2010
Report: JQE601

TotalTime	Count	Overall	Threshold	
00:00:00	87	7.08%	7.08%	
00:00:01	205	16.68%	23.76%	
00:00:02	141	11.47%	35.23%	
00:00:03	119	9.68%	44.91%	
00:00:04	81	6.59%	51.51%	
00:00:05	62	5.04%	56.55%	
00:00:06	61	4.96%	61.51%	
00:00:07	38	3.09%	64.61%	
00:00:08	38	3.09%	67.70%	
00:00:09	38	3.09%	70.79%	
00:00:10	24	1.95%	72.74%	
00:00:11	27	2.20%	74.94%	
00:00:12	23	1.87%	76.81%	
00:00:13	14	1.14%	77.95%	
00:00:14	17	1.38%	79.33%	
00:00:15	**20**	**1.63%**	**80.96%**	**Threshold: 80%**
00:00:16	12	0.98%	81.94%	
00:00:17	12	0.98%	82.91%	
00:00:18	10	0.81%	83.73%	
00:00:19	7	0.57%	84.30%	
00:00:20	5	0.41%	84.70%	
00:00:21	7	0.57%	85.27%	
00:00:22	5	0.41%	85.68%	
00:00:23	5	0.41%	86.09%	
00:00:24	5	0.41%	86.49%	
00:00:25	6	0.49%	86.98%	
00:00:26	6	0.49%	87.47%	
00:00:27	3	0.24%	87.71%	
00:00:28	2	0.16%	87.88%	
00:00:29	7	0.57%	88.45%	
00:00:30	5	0.41%	88.85%	
00:00:31	1	0.08%	88.93%	
00:00:32	2	0.16%	89.10%	
00:00:33	1	0.08%	89.18%	
00:00:34	5	0.41%	89.59%	
00:00:35	4	0.33%	89.91%	
00:00:36	**6**	**0.41%**	**90.32%**	**Threshold: 90%**
00:00:37	5	0.41%	90.72%	
00:00:38	2	0.16%	90.89%	
00:00:39	1	0.08%	90.97%	
00:00:40	1	0.08%	91.05%	
00:00:41	4	0.33%	91.38%	
00:00:42	1	0.08%	91.46%	
00:00:43	1	0.08%	91.54%	

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Figure 7.1 – Job Queue Execution Times Report

The report can be customized using the following options:

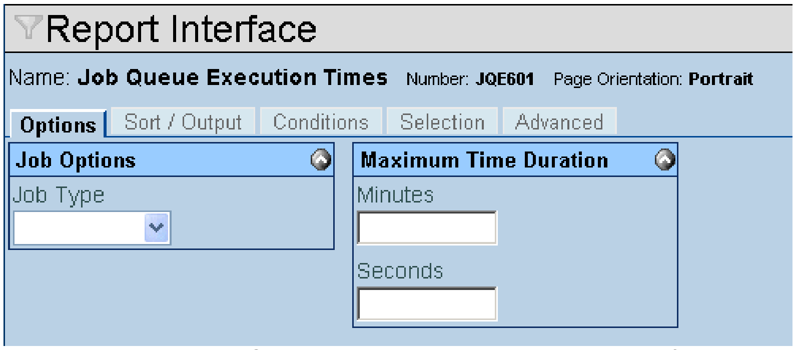

Figure 7.2 – Job Queue Execution Times Report, Report Interface

- Select the type of job to be included in the **Job Type** list.
- Set the **Maximum Time Duration** of the jobs to be included by entering the minutes and seconds of the longest job to be included.

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JQE602 - JOBS BY HOUR

The Jobs by Hour report lists each hour of the day with the status of the jobs for that hour and how many jobs were processed at the time.

Hope High School
Jobs by Hour

Year: 2009-2010
Report: JQE602

Hour	State	Count
12 AM	Complete	14
1 AM	Complete	10
2 AM	Complete	268
3 AM	Complete	12
4 AM	Complete	28
5 AM	Complete	11
6 AM	Complete	26
7 AM	Complete	19
8 AM	Complete	47
9 AM	Complete	64
10 AM	Complete	82
11 AM	Complete	52
0 PM	Complete	51
1 PM	Complete	61
2 PM	Complete	71
3 PM	Complete	80
4 PM	Complete	56
5 PM	Complete	63
6 PM	Complete	30
7 PM	Complete	9
8 PM	Complete	22
9 PM	Complete	43
10 PM	Complete	44
11 PM	Complete	61
	Total Jobs:	1224

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Figure 7.3 – Jobs by Hour Report

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The report can be customized using the following options:

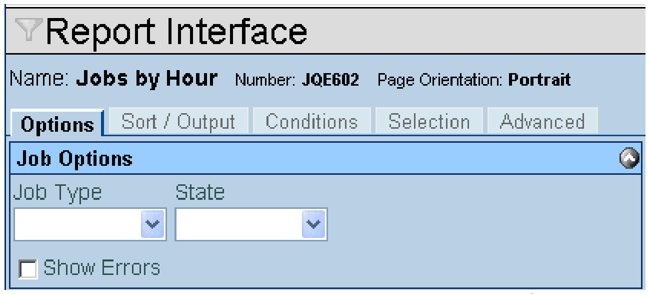

Figure 7.4 – Jobs By Hour Report, Report Interface

- Select the type of job to be included in the **Job Type** list.
- Select the **State** of the jobs that are included in the report.
- To include jobs that were not completed because of errors in the totals for the report, check the **Show Errors** box.

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JQE603 - JOBS BY TYPE

The Jobs by Type report lists all types of jobs, including each report, and a count of how many of each type of job has been processed.

Hope High School
Jobs by Type

Year: 2009-2010
Report: JQE603

JobID	Desc	Count
ADM475	Average Daily Membership	2
ADM601	Cumulative ADM/Absence Rate Report	1
ADM602	Student Count Report	1
ADM675	Average Daily Membership Summary	1
ADS201	Student Discipline Profile	3
ADS401	Student Discipline Listing	2
ADS402	Student Demerit List	1
ADS403	Discipline Disposition List	1
ADS601	Discipline Summary by Grade	2
ADS602	Discipline Summary by Ethnic Code	1
ADS801	Disciplinary Action Form	11
ATD201	Daily Attendance Profile	5
ATD202	Daily Attendance Minutes Profile	1
ATD401	Daily Student Absence Totals	1
ATD402	Daily Attendance List	3
ATD403	Daily Absent List	17
ATD405	Daily Perfect Attendance List	1
ATD406	Daily Student List by Attendance	1
ATD413	Class Reduction Summary	16
ATD601	Daily Attendance Summary	2
ATD603	Monthly ADA Detail	10
ATD604	Monthly ADA Summary	20
ATD605	Cumulative Enrollment Totals	1
ATD606	Monthly School Enrollment Report	8
ATD801	Attendance Sheet	17
ATD802	Attendance Sheet	1
ATD805	Attendance Letters	3
ATP201	Period Student Attendance Profile	4
ATP401	Period Attendance List	3
ATP404	Period Class Attendance List	7
ATP409	Period Absence Count	1
ATP602	Period Sections Missing Attendance List	3
ATP603	Positive Attendance Summary	5
ATP604	Positive Attendance Audit	2
ATP606	Positive Attendance Summary Extended	1
ATP607	Positive Attendance Audit Extended	2
ATP608	Supplemental Instruction Summary	5
ATP609	Supplemental Instruction Detail	1
ATP802	Attendance Auto Dialer Report	3
ATT-SHT	Attendance Sheet Creation	1
CHS202	Student Grad. Requirement Profile	14
CHS402	Graduation Requirement List	3
CHS404	Student Graduation Check	2
Clear Results	Clear all scheduling results - leave pre-schedules alone	2
CNF201	Student Conference Profile	4

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Figure 7.5 – Jobs By Type Report

The report can be customized using the following options:

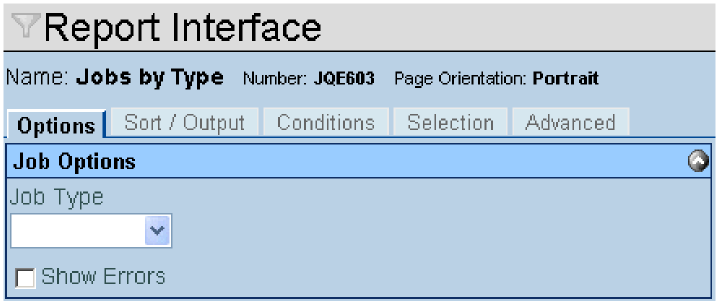

Figure 7.6 – Jobs by Type Report, Report Interface

- Select the type of job to be included in the **Job Type** list.
- To include jobs that were not completed because of errors in the totals for the report, check the **Show Errors** box.

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Chapter Eight: SECURITY

In this chapter, the following topics are covered:

- ► Where security for query-related screens may be defined
- ► Where security for report-related screens may be defined

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Security for each of the screens discussed in this guide is defined by two options: the **PAD Security** screen and the **Security Definition** screen. Both are found under **Synergy SIS > System > Security**. How each works and how security is defined is covered in detail in the *Synergy SIS - Security Administrator Guide*. This chapter outlines where the security for query and reporting screens is defined in the **Security Definition** screen.

JOB QUEUE VIEWER SECURITY

Synergy SIS > System > Job Queue > Job Queue Viewer is controlled by the node below. This node also controls the **Job Q Adm Viewer** screen.

Revelation.JobQueueInfo.JobQueue

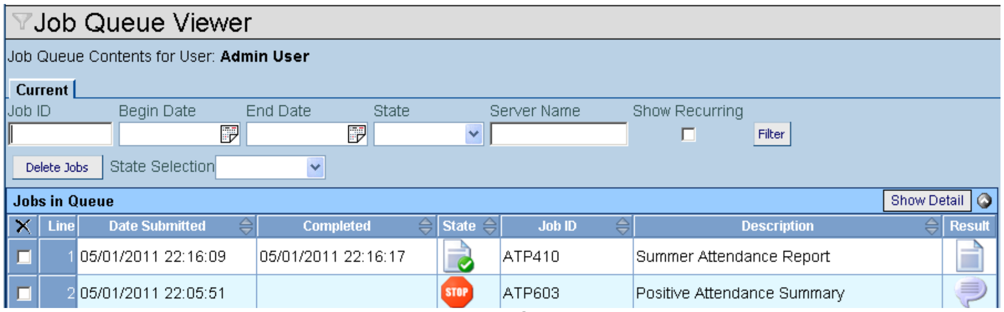

Figure 8.1 – Job Queue Viewer

The **Results** tab of the detail screen is controlled by the node below. This node also controls the **Results** tab of the **Job Q Adm Viewer** screen.

Revelation.JobQueueInfo.JobQueueResultGrid

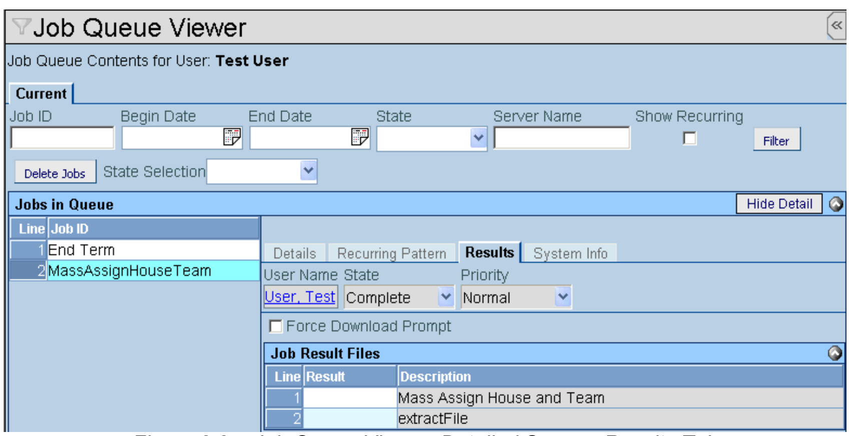

Figure 8.2 – Job Queue Viewer, Detailed Screen, Results Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.JobQueueInfo.JobQueueUI
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur

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JOB Q ADM VIEWER SECURITY

Synergy SIS > System > Job Queue > Job Q Adm Viewer is controlled by the node below. This node also controls the **Job Queue Viewer** screen.

Revelation.JobQueueInfo.JobQueue

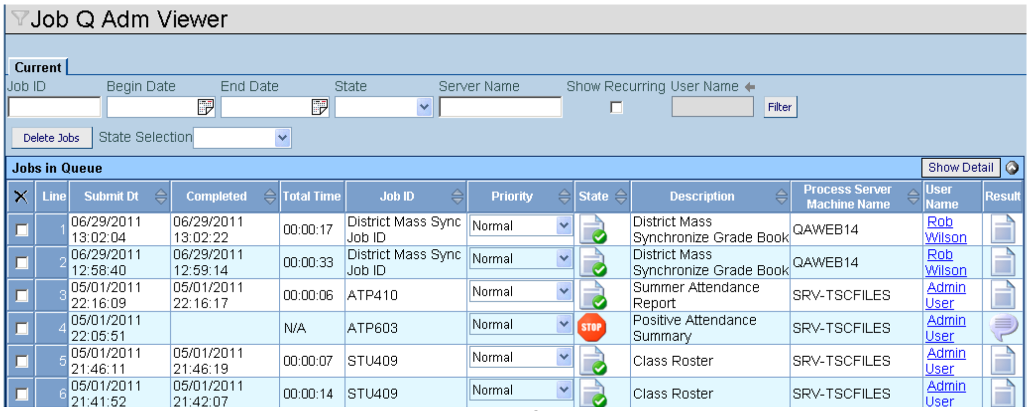

Figure 8.3 – Job Q Adm Viewer

The **Results** tab of the detail screen is controlled by the node below. This node also controls the **Results** tab of the **Job Queue Viewer** screen.

Revelation.JobQueueInfo.JobQueueResultGrid

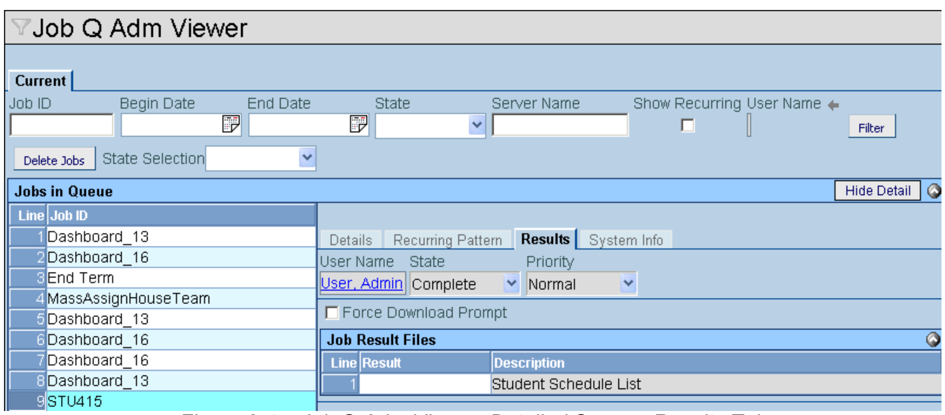

Figure 8.4 – Job Q Adm Viewer, Detailed Screen, Results Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.JobQueueInfo.JobQueueUI
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur

QUERY SECURITY

The **Columns** tab of **Synergy SIS > Query > Query** is controlled by the security nodes:

- **Revelation.Query.RevQuery** controls the main Query information such as Name, Group, and Type. This node also controls the **Type in Query** tab.
- **Revelation.Query.BusinessObjectGrid** controls the grid under Step 1.
- **Revelation.Query.BusinessObjectProperty** controls the grid under Step 2.
- **Revelation.Query.AllPropertyGrid** controls the grid under Step 3.

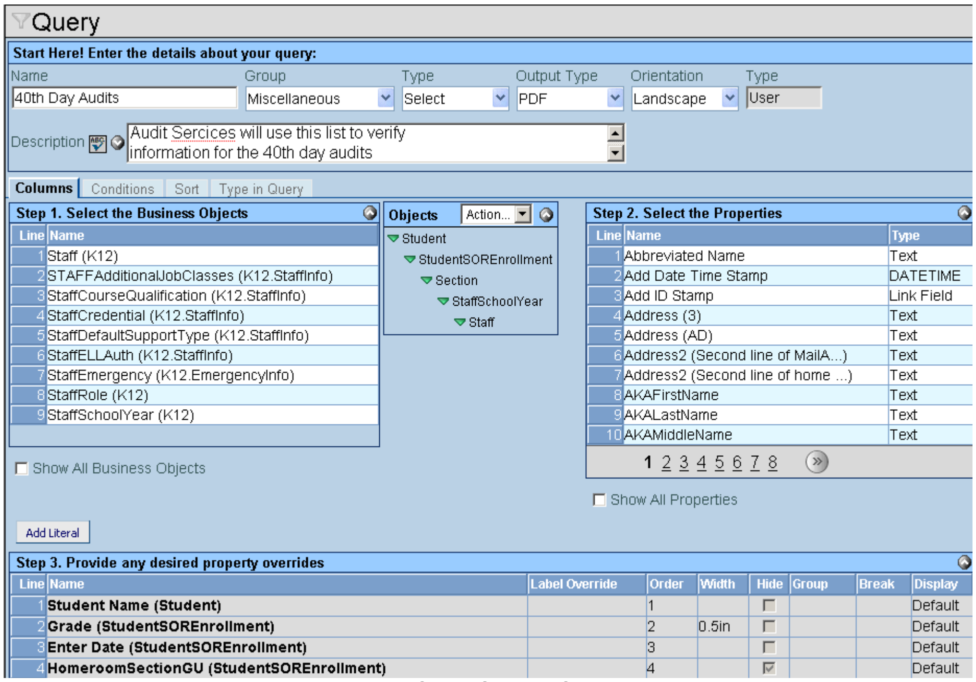

Figure 8.5 – Query Screen, Columns Tab

The **Conditions** tab of the **Query** screen is controlled by the security node:

Revelation.Query.ConditionTree

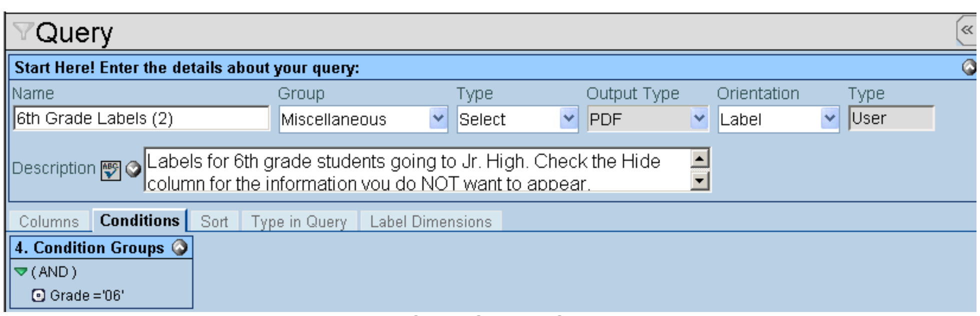

Figure 8.6 – Query Screen, Conditions Tab

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The **Add Condition** screen, which opens when adding a condition to the **Conditions** tab, is controlled by the security node:

Revelation.Query.RevQueryCondition

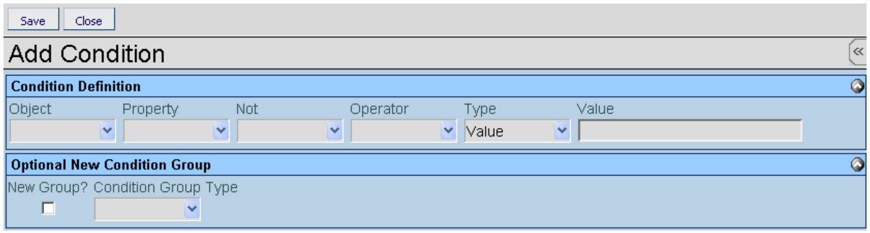

Figure 8.7 – Add Condition Screen

The **Sort** tab of the **Query** screen is controlled by the security node:

Revelation.Query.RevQuerySort

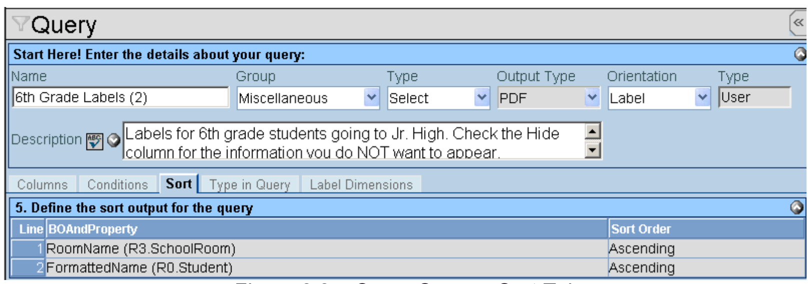

Figure 8.8 – Query Screen, Sort Tab

The **Type in Query** tab of the **Query** screen is controlled by the security node below. This node also controls the main Query definition fields such as Name, Group, and Type.

Revelation.Query.RevQuery

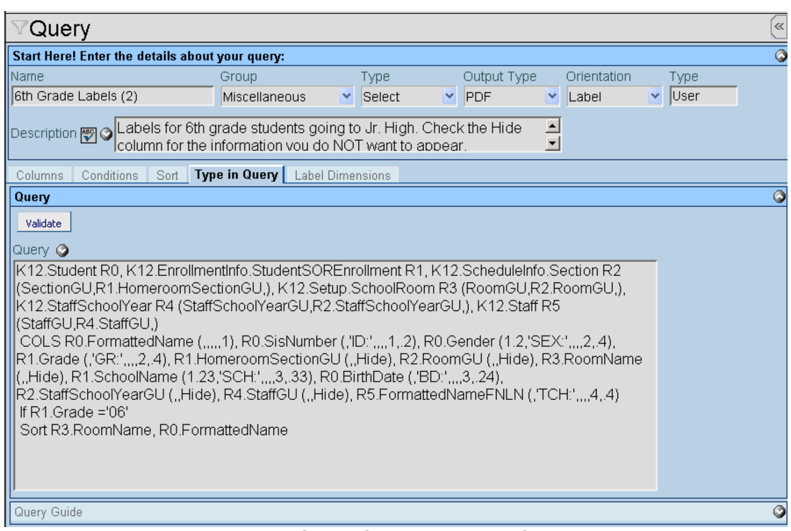

Figure 8.9 – Query Screen, Type In Query Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.Query.QueryRI
- Revelation.Query.ConditionGrid
- Revelation.Query.QueryExecute
- Revelation.Query.QueryUser

Query Admin Security

The **Public Queries** tab of **Synergy SIS > Query > Query Admin** is controlled by the node:

Revelation.Query.QueryPublicGrid

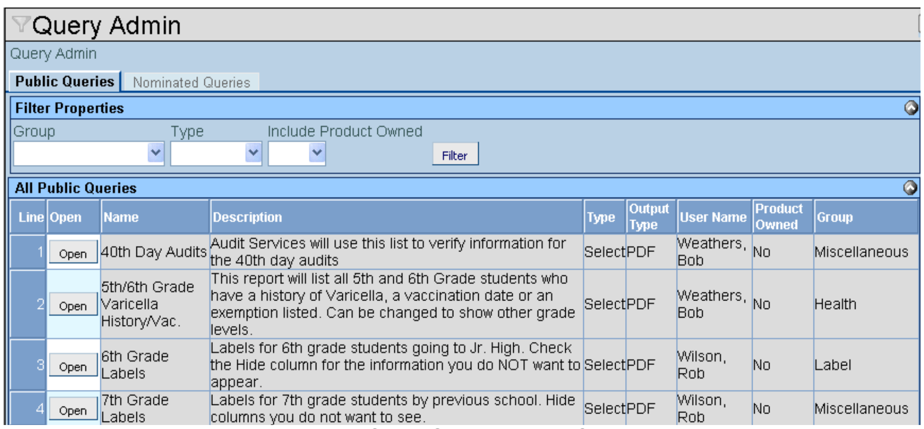

Figure 8.10 – Query Screen, Public Queries Tab

The **Nominated Queries** tab of the **Query Admin** screen is controlled by the node:

Revelation.Query.QueryEvalGrid

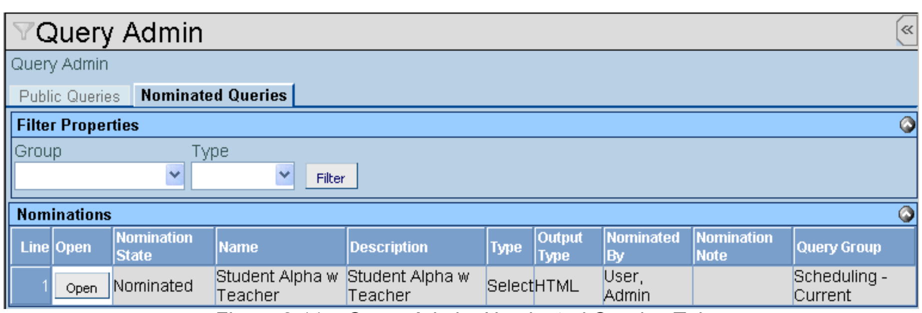

Figure 8.11 – Query Admin, Nominated Queries Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.Query.QueryOpenPublicGrid
- Revelation.Query.QueryPublic

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JOB QUEUE REPORTS SECURITY

While report security options are available on the **Security Definition** screen, it is recommended to only use the PAD tree security to control access to reports.

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