



Workflow Administrator and User Guide



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ABOUT THIS GUIDE

Document History

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July 2013	1	1	1	Initial release

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

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. Please disable any pop-up blockers and extra toolbars before logging in to any Edupoint product.

Chapter One: OVERVIEW

This chapter covers

Overview of Synergy Workflow

OVERVIEW OF SYNERGY WORKFLOW

Synergy workflows enable you to manage and monitor complex processes as single unit within Synergy SIS and Synergy SE. One use is ensuring compliance with state, federal, or district regulations.

Workflows involve three screens:

- The Workflow Definition screen, where workflows are created and managed.
- The **School Workflow** screen, where school-wide processes are initiated, acted upon, and tracked. These processes are school-wide functions such as-New Year Rollover, state reporting, federal reporting, and grading cycle, including report card processes
- The **Student Workflow** screen, where individual student processes are handled. These are functions linked to individual students, such as student withdrawal, student discipline, special education, and student conferencing.

These screens are all in the Synergy SIS navigation tree (also known as the PAD tree) at **Synergy SIS > System > Workflow**.



Tip: Edupoint provides several special education workflows designed for districts in your state to help with reporting requirements.

Chapter Two: WORKFLOW SETUP

This chapter covers:

- ► Workflow Setup
- Workflow Elements

WORKFLOW SETUP

It is helpful to look at setting up a workflow as involving two phases:

- Establishing the name, accessibility, and other properties of the workflow's container •
- Establishing the activities, resources, dependencies, and decision points that make up the process within the workflow

To set up a workflow's container:

- 1. Navigate to Synergy SIS > System > Workflow > Workflow Definition.
- 2. Click the Add button.

Menu 🔻 🔍 🔍 🛞 🛛 🛒 🛛 🖪	ind Undo Add	Delete		Status: Find	2 🖏 🚼 🕜
Workflow Definition	י ו				(«
Workflow Name:					
Options System					
Namespace	Name	R	levision Disabled		
Primary Workflow Business Object					
	×				
Open with Visual Editor					
Accessible from the following View	ws				Chooser 🔇
X Line	Namespace		\Leftrightarrow	Name	¢

Figure 2-1 – Workflow Definition screen Add button

3. In the **Namespace** box, indicate where the step will originate, such as **K12**.

Save Close			
Workflow Definition			~
Namespace	Name	Revision Disabled	
Figure 2-2 – Workflow Definition add screen			

Figure 2-2 – Workflow Definition add screen

- 4. In the **Name** box, enter a descriptive name for the workflow, such as **Student** Conference.
- 5. Only if you want the workflow to be unavailable initially, check the **Disabled** box.
- 6. Click Save.

The new workflow is displayed on the Workflow Definition screen.

Workflow Definition					
Workflow Name: K12.Student Co	Workflow Name: K12.Student Conference				
Options System					
Namespace	Name	Revision	Disabled		
K12	Student Conference	1.0			
Primary Workflow Business Object					
Open with Visual Editor	Open with Visual Editor				

Figure 2-3 – Workflow Definition screen with new workflow

7. In the Primary Workflow Business Object list, click K12.School for a school workflow or K12.Student for a student workflow.

8. In the Accessible from the following Views section, click Chooser to find and select screens from which users will have access to the workflow.

Notes: For information about how to access workflows from the screens chosen here, see Using Screens to Access Workflows on page 18. All school workflows and student workflows are accessible from the School Workflow and Student Workflow screens, respectively.

Acc	essibl	e from the following Views		Chooser 🔇
$\left \times \right $	Line	Namespace 🗧	Name	\Leftrightarrow
	1	K12.ConferenceInfo	Student Conference	

Figure 2-4 – Accessible from the following Views section

9. Click Save.

Note: Workflows created by a user with a particular Role are accessible by users with the same Role association. Also, only the user who creates a workflow can edit that workflow.

To set up the process within the workflow:

1. Click Open with Visual Editor.

Workflow Definitio	n		(
Workflow Name: K12.Student Con	nference		
Options System			
Namespace	Name	Revision	Disabled
K12	Student Conference	1.0	
Primary Workflow Business Object			
K12.Student	~		
Open with Visual Editor			

Figure 2-5 – Open with Visual Editor button

2. Insert and organize workflow elements. See Workflow Elements later in this chapter for descriptions of the elements.



Figure 2-6 – Workflow Editor

3. Click the Save icon.



WORKFLOW ELEMENTS

An element in a workflow can be an Activity, Option, External Task, or Decision.

Activities are such things as providing information on screens. Example: Filling in information for state reporting.

Decisions are branches in the process, where different situations lead in different directions.

Options are points at which a decision has been made and where a link may be established for the next step. They are only available for creation from already established **Decisions**.

External Tasks are actions that are outside the workflow process but are necessary for completion of the workflow.

When a workflow is created, the default elements are Start and Stop.



Figure 2-8 - Workflow Editor with Start and Stop

If you hover over the **Start** box, two icons appear below it (**A**). Click the rectangle to create an Activity. Click the diamond to create a Decision. In general, icons that appear below a workflow element enable you to add other elements.

Creating an Activity

1. Click the Insert Activity rectangle.



Edit Activity		
SAIS Submission Options User Groups		
Label 🔶 🔺 🛶	SAIS Submission	
	Make sure you are on step one of the process	~
Parent Communication	NO	\checkmark
Туре ← 🖸>	View	\checkmark
View 🔶 D 🔶	SAIS Submission (K12.AZ.SAIS)	\checkmark
Tab 🔶 🔳 🛶	Run	×
Milestone	None	\checkmark
Help Path 🗲 F 🔶		

2. On the **Insert Activity** screen, provide information about the activity.

Figure 2-10 – Edit Activity (also Insert Activity) screen

- A. The Label describes the activity step.
- B. The **Description** gives helpful details about the Activity step.
- C. The **Type** can be such things as an external task, a meeting of people concerned with the Activity, a report to be generated, or a view (screen) that relates to the Activity. Other fields can appear, depending on your selection for **Type**.
- D. **View** is an example of a field that appears because of your selection (**View**) in the **Type** list. Your selection here can again cause another field to appear.
- E. **Tab** is an example of a field that appears because of your selection in another list (in this case, the **View** list).
- F. The Help Path is a path to a document or web site where you provide help for the user.
- 3. Click **Ok**.



Adding a Decision

1. Click the Insert Decision diamond below an activity.



Figure 2-11 – Decision diamond

2. Name and describe the decision to be made.

Add Decision		
Add to: Accident Details		
Label	Report to Health Dept?	
Description	Does this incident merit reporting to the County Health Dept? Yes or No	
Milestone	None	
Help Path		
F	idure 2 10 – Add Decision screen	

3. Click Ok.

A decision and one option that can result from the decision are added.

Creating an Option

1. On a Decision box, click the Add Option icon (A).



Figure 2-12 – Decision option

Note the Option (\mathbf{B}) and the arrow leading to the next element that follows from this option.

2. Type a Label for the Option, and click Ok.

Add Option		
Add to: Verification		
Label		
	O	Cancel



Note: Workflows do not require Decisions and Options. Some workflows might require only Activities or External Tasks to bring them to successful conclusions.

Expanding Options

Figure 2-14 shows an Option (**A**) linked to an External Task (**B**). The other Option links to the end of the workflow (**C**).

Student Withdrawal	
** In Use ** 🛛 🖉 🖬 🔀 😢	etucent restraining
📁 1. Start	
2. Student Withdrawal	Cotion
3. Print Withdrawal packet report	Edemal Task
4. Is this student returning next year?	Encol the student in next year.
1.1 Yes	Ť.
1.2 No	Stop
5. Enroll the student in next year.	stop
👩 6. Stop	
	stop y stop
	terral Task as next of an Ontion





Note: External Tasks are not necessarily external to Synergy. They may simply be outside the scope of the current workflow process.

Creating multiple decision paths

Figure 2-15 shows an Activity (A) that leads to a somewhat complicated set of elements.



Figure 2-15 - Complex workflow with nested Decisions

The workflow is tracked by dotted lines (B) connecting the steps.

One Decision (**C**) has two Options; the first of those (**D**) links to a second Option (**F**). This second Option returns (**E**) to a previous Activity to correct something before the workflow can end.

On a Decision, you can click a red X to remove a step, a pencil to edit a step, a green dash to toggle or change a link, or a green plus sign to add an Option step.

You can edit a workflow in the list view (G) rather than in the flowchart view. You can enlarge or shrink the flowchart using the Zoom and Overview controls (H).

Chapter Three: USING WORKFLOW

This chapter covers:

- ► Using Screens to Access Workflows
- ► Using Student or School Workflow
- Importing and Exporting Workflows
- Workflow Reminders
- Workflow Definition System Tab

USING SCREENS TO ACCESS WORKFLOWS

Users can access a workflow from various screens if the following conditions are met:

- The creator of the workflow added the screen to the **Accessible from the following Views** grid, as described in the Workflow Setup section in Chapter Two.
- The users have the same Role as the creator of the workflow.

Figure 3-1 shows the **Student** screen as an example.

Menu 🕶 🔍 🛞		Save Undo	Add Delet	te						
Edit Student Data										
Reports	▶									
Report Preferences	v C.	School: Hope H	igh School Home	room: 108 Te	acher: Nebelung	.м. <mark>Си</mark> з	stody!			
Attach Photo	2		-			·				
Inactivate Student	lardia	n Other Info	Emergency	Enrollment	Enrollment H	listory	Classes	Documents	Contact Log	Notes
"No Show" Student	rst N	ame	Middle Name	Suffix P	erm ID	Grade		Gender		
Workflows	► Stude	ent Test	С	9	05483	12	~	Male 💌		
VIEW AUGIL Detail For S	udent									
Ho	me Langua	ge Spoken at	Home	Nick Nam	e Last N	ame Go	es By			
Sp	anish	Spanish	•	Willy1						
SAL SAL	IS ID	Birth Date	Birth Pla	ce	Birth Verificat	tion		Birth Certi	ficate Num	
	01341311	07/31/2002	Mesa							
Birl	th State	Birth	Country	Er	nail 😥					
Cal	lifornia	🗸 Unite	d States of Ame	rica 🔽 bi	abbot@edupoir	nt com				

Figure 3-1 – Accessing a workflow from the Student screen

To run a workflow from this screen:

- 1. Click Menu, point to Workflows, and click the name of the workflow.
- 2. Click Initiate Workflow.

Initiate Workflow Would you like to initate the workflow 'Student Test' for the student 'Abbott, Billy C.'? Description Date Time 04/11/2013 P 1:19 PM	Initiate Workflow Cancel
Would you like to initate the workflow 'Student Test' for the student 'Abbott, Billy C.'? Description Date Time 04/11/2013 PM 1:19 PM	Initiate Workflow
Description Date Time 04/11/2013 Time 11/12013 Time	Would you like to initate the workflow 'Student Test' for the student 'Abbott, Billy C.'?
Date Time 04/11/2013 PM 1:19 PM	Description
	Date Time 04/11/2013 PM

Figure 3-2 – Initiate Workflow

Steps in the workflow are displayed in order (**A**). Only those steps up to the first Decision are displayed, so that the user cannot skip steps.

Y	Norkflow							(9
Stud	lent Name: Abbott, Billy C. Workflow	r. Rob Test						
Ste	ps		A					
V	/orkflow Map Rollback to Previous D	ecision	V			В		
Step	os 🔹 🗖						St	now Detail 🔇 🔕
Line	Name	Completion Date		Status		View Report	Notes	Help
1	Student Screen			In Progress	8	Student		
2	2 Student List			Not Started				
3	3 UD Report	P		Not Started				
4	4 Stop			Not Started				
3	2 Student List 2 UD Report 3 Stop			Not Started Not Started Not Started				



- 3. Click links (B) to screens or reports, as needed, to perform required actions.
- 4. Enter the date (C) and continue to the next step, if desired.

Rolling back a decision

If a Decision point has not been passed, you can back up in the process and fix errors.

1. Select a step, and click the **Rollback to Previous Decision** button (A).

∀Workflow									
Stude	Student Name: Abbott, Billy C. Workflow: Rob Test								
Step	orkflow Map Rollback to Pre	evious Decision]						
Step	Show Detail G						Detail 🔕		
Line	Name	Completion Date	v Status		View/Report	Notes	Help		
1	Student Screen	05/01/2013	Completed	8	Student				
2	Student List		In Progress	82	STU401 - Student List				
3	UD Report		Not Started						
4	Stop		Not Started						

Figure 3-4 – Rollback to Previous Decision

2. Click Rollback to Previous Decision, and click OK.

OK Close
Student Workflow Rollback Confirm
Rollback Confirm
Rollback will delete all steps until previous decision. Do you want to continue?
Cancel
Rollback To Previous Decision

Figure 3-5 – Rollback Confirm

Workflow Step Details

You can see the details of a step in the workflow process by clicking a line number and clicking the **Show Detail** button.

∀Workflow	
Student Name: Abbott, Billy C. Workflow: Rob	Test
Steps	
Workflow Map Rollback to Previous Decision	
Steps	A Hide Detail
Line Name	Name: Student Screen
1 Student Screen	
2 Student List	Name
3 UD Report	Student Screen
4 Stop	
	Dates
	Completion Date
	05/01/2013 C
	Status Info
	Decision Status Action View Type
	Completed Completed v Student
	Step Decision Completed by 🔶
	User. Admin

Figure 3-6 – Workflow details

- A. Selected line and **Task** Info tab.
- B. Description of the overall workflow, from the **Workflow Definition** screen. Only the creator of the workflow can edit this description.
- C. Progress made on this step.

Compliance and Contact Notes (Comments)

₩Workflow		«
Student Name: Abbott, Billy C. Workflow: Rob Te	est	
Steps		
Workflow Map Rollback to Previous Decision		
Steps	Hide Detail	5
Line Name	Name: Student Screen	
1 Student Screen	Tack lofa Native Contact Nation	
2 Student List	Task line Notes Contact notes	
3 UD Report	Notes Add 🔇	
4 Stop	X Line Created On ⊖ User Name Note ⊖	

Figure 3.7 - Workflow Notes

A. You can add compliance notes and contact notes on the **Notes** and **Contact Notes** tabs by clicking the **Add** button. These notes are for the particular step and student or school. These notes are intended primarily for special education, but you can use them for any workflow.

USING STUDENT OR SCHOOL WORKFLOW

You can start a workflow from Synergy SIS > System > Workflow > Student Workflow or Synergy SIS > System > Workflow > School Workflow. The process is the same as when you start from another screen as described earlier in this chapter.

IMPORTING AND EXPORTING WORKFLOWS

Synergy users on different systems can share workflows by exporting and then importing them.

To export:

1. On the **Workflow Definition** screen, click **Menu**, point to **Utilities**, and click **Export Workflow**.

Menu 🔻 🔍 🔍 🚿 🚺	Save Undo Add Delete
Edit WorkflowDef Data	
Utilities View Audit Detail For Workflow Defir	nition
Options System	Import Workflow
Namespace	Name
K12	Student Conference
Primary Workflow Business Objec	t
K12.Student	▼
Open with Visual Editor	
Accessible from the following Vi	ews
X Line	Namespace
T 1 K12.ConferenceInfo	

Figure 3-7 – Exporting a Workflow

2. In the box that opens, click **Save**.

Synergy saves the workflow as a file that you can give to another user.

To import:

- 1. On the **Workflow Definition** screen, click **Menu**, point to **Utilities**, and click **Import Workflow**.
- 2. Locate and select the workflow file, and click Upload.

WORKFLOW REMINDERS

You can set up task and email reminders for workflows that you initiate.

- 1. Navigate to Synergy SIS > System > Task Definition.
- 2. On the lines for **Student Workflow** and **School Workflow**, check boxes in the **Enabled** column to see tasks on your home page, and in the **Email** column to receive email.

Menu	- 🍏	Sa	ve Undo		
Y	ask l	Defi	nition		
Task	Process				
Task	Execution	on Tim	е		
9:59 A	۹M		F	Run T	ask Process Immediately
			Option	s	
			Ger	era	te Task For Entire Day
			lf Gene built fo Task F	erat or the Proc	e Task For Entire Day is se e entire day. This is applica ess Immediately.
Task	Definitio	on	2		
Task	Definitio				
	Ľ		Email 🥢	L	· .
Line	Enabled	On Start	On Complete	Des	scription
11	•	✓	~	ABC	Student Workflow
12	•	~	~	ABC-	School Workflow
13				ABC	Request for Assistance
	F	igure	3-8 – Tas	k D	Definition

3. For tasks, navigate to **Synergy SIS > System > User > User** (or **User Groups**), Find or scroll to the appropriate user or group, click the **POV** tab, and check the boxes for **School Workflow** and **Student Workflow**.

∀User									*
User Name: Ade	erson, Go	rdon							<u> </u>
Demographics	Organiza	tions Us	er Groups	Navigation Me	nu Secu	rity Settings	Focus Spe	II Check POV	1
Last Name	I	First Name	•	Middle Name	Disabled	User Type	Login as User		
Aderson		Gordon				Staff 🛛 👻			
Point of View (POV) Hom	e Page Se	ettings						0
Dashboard Cor 3	ntrols Per I	Row							
Dashboard Cor	trols						Add	Chooser 🤇	>
X Line Or	derby 🍦	Name	\$ G	raphType 🔶	Widget	ID 🔶	Last Update D	Date Time 🗧 🗧	
Task Setup									
Show Task List									
Yes 🗸									
Task Module									ר
Electronic S	tudent Re	cord							
Family Char	nges								
Health									
Incident Dis	cipline								
Incident Ref	erral								
PVUE Upda	te								
Request for	Assistanc	е							
Routing - Tr	ransportati	ion							
School Wor	kflow								
Student	_								
Student Wo	rkflow								
Teacher - T	ransporta	tion							
Transport -	Transport	ation							

Figure 3-9 – POV tab, workflow check boxes

WORKFLOW DEFINITION SYSTEM TAB

The **System** tab of the **Workflow Definition** screen contains information that is primarily for use in troubleshooting by Edupoint personnel. It includes the XML on which the display in the Visual Editor is based.

Workflow Definition	n			«
Workflow Name: K12.Student Cor	nference			
Options System				
Namespace	Name	Revision	Disabled	
K12	Student Conference	1.0		
Created By				
USA.AZ.ESD				
Last User Change Info				
User Name Change Date Time S	Stamp			
User, Admin 07/09/2013 15:16:00				
User Add Info				
User Name Add Date Time Stan	a			
User, Admin 07/09/2013 14:32:00	· ·			
Xmi 🙆				
<pre><?xml version="1.0" encoding="utf-8" <workflow 25cd5d0a-1180-463e-84a9-9a6<br="" label="Student Cor
ID=">E8A3757CEF05" TAB="1543CA5A-F <description> </description> <roles> <case_manager guid="<br" label="Cas
4A32-ADF4-4C19AA7CED7B"><psychologist guid="<br" label="Psyci
4A32-ADF4-4C19AA7CED7B"><psychologist guid="<br" label="Psyci
4A32-ADF4-4C19AA7CED7B"><speech_therapist 52d78195-37"<br="" label="
BUSINESS_OBJECT=">FBAE36D8AD43" /> <occupational_therapist 52d78195-37"<br="" label="
BUSINESS_OBJECT=">FBAE36D8AD44" /> <physical_therapist label="<br">BUSINESS_OBJECT="52D78195-37" FBAE36D8AD44" /> <physical_therapist label="<br">BUSINESS_OBJECT="52D78195-37" FBAE36D8AD44" /></physical_therapist></physical_therapist></occupational_therapist></speech_therapist></psychologist></psychologist></case_manager></roles></workflow></pre>	?> iference" VERSION="1.0" GUID="25(iE3C88EA58" TYPE="" INVALID="fal 278-4430-885B-059965DCFF4D" GRI e Carrier" ROLE_TYPE="CASE_MAI "1E4FAA26-CE5C-495B-A71E-FBAE hologist" ROLE_TYPE="PSYCHOLO "2E4FAA26-CE5C-495B-A71E-FBAE Speech/Language Therapist" ROLE_ 1A-4A32-ADF4-4C19AA7CED7B" GU ABEL="Occupational Therapist" ROL 1A-4A32-ADF4-4C19AA7CED7B" GU ="Physical Therapist" ROLE_TYPE=" 1A-4A32-ADF4-4C19AA7CED7B" GU	CD5D0A-1180-463E-84 se" VIEW="D43F73B8 D="STEPS_GRID"> IAGER" BUSINESS_C GIST" BUSINESS_OE GIST" BUSINESS_OE GIST" BUSINESS_OE 3608AD42" /> TYPE="SPEECH_THE ID="3E4FAA26-CE5C E_TYPE="OCCUPATI ID="4E4FAA26-CE5C PHYSICAL_THERAPI ID="5E4FAA26-CE5C	A9-9A6E3C88EA58" I-C386-49FA-AA28- DBJECT="52D78195-371A ="YES" /> JJECT="52D78195-371A- :RAPIST" -495B-A71E- ONAL_THERAPIST" -495B-A71E- ST" -495B-A71E-	

Figure 3-10 – Workflow Definition screen, System tab



Caution: Copy and paste of the XML text is not a viable alternative to exporting and importing workflows.

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