Synergy SIS©
Dashboard Guide

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Volume 01, Edition 01, Revision 04 **May 2013**

Document Number: SISDWAG-010103

First Edition, October 2009
Second Revision, March 2010
Third Revision, July 2011
Fourth Revision, May 2013

This edition applies to Synergy SIS™ Student Information System software and all subsequent releases and modifications until indicated with new editions or revisions.

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The data in this document may include the names of individuals, schools, school districts, companies, brands, and products. Any similarities to actual names and data are entirely coincidental.

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ABOUT THIS MANUAL

Document History

Date	Volume	Edition	Revision	Content
October 2009	1	1	1	Initial release of this document
March 2010	1	1	2	Updated document for November 2009 release, February & March 2010 patches
July 2011	1	1	3	Updated for June 2011 release
May 2013	1	1	4	Updated for the 2013 release of version 8.0

CONVENTIONS USED IN THIS MANUAL

Bold Text

Bold Text - Indicates a button or menu or other text on the view 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.

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 in the browser before logging in to any Edupoint product.

Chapter One:
OVERVIEW OF DASHBOARD WIDGETS

This chapter covers:

- Overview of dashboard widgets
- Types of dashboard widgets
- How end users can customize their dashboards

OVERVIEW OF DASHBOARD WIDGETS

A dashboard widget or control is a dynamic source of information that appears on a user's Synergy SIS home screen. Examples include graphical reports designed to track student data trends, such as enrollments by day, attendance patterns, or grades, and links to external sources of web-based information such as images or RSS feeds.

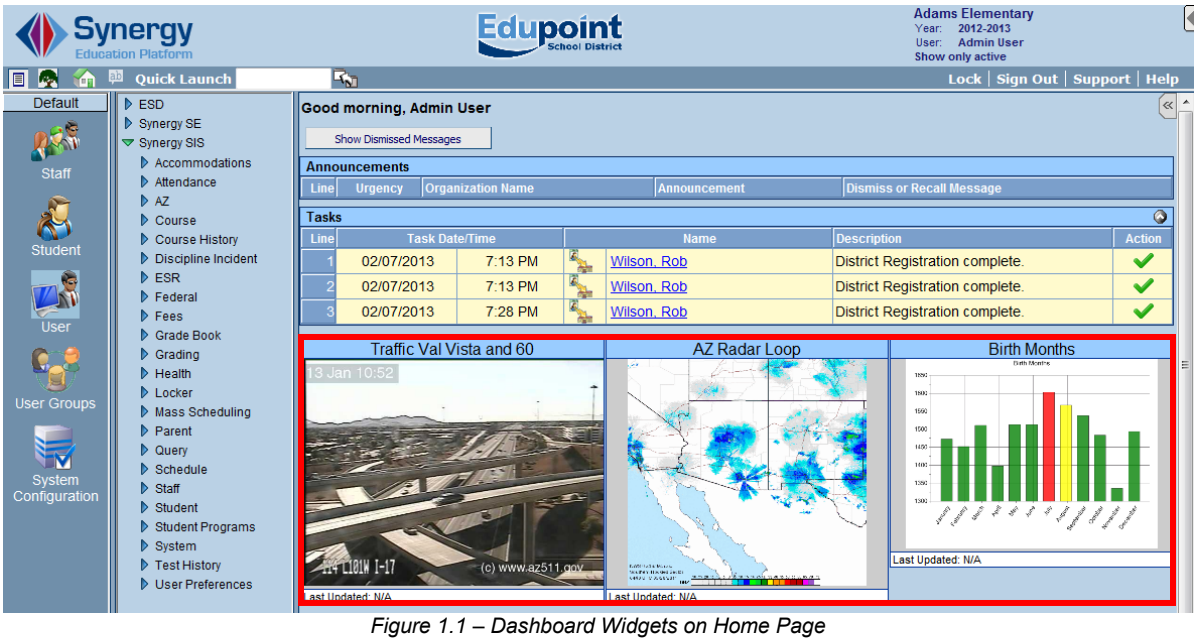


Figure 1.1 – Dashboard Widgets on Home Page

This chapter illustrates the types of widgets that can be created, and how users can add widgets to their home pages. Chapter Two shows how to create a dashboard widget, and how administrators can add widgets to user home pages. Chapter Three shows examples of widgets.

TYPES OF DASHBOARD WIDGETS

There are four types of dashboard widgets: Query, External Image, RSS Feed, and SQL Query.

A **Query** widget is based on an existing Synergy SIS public query. It displays the data results from the query in a graph or chart, such as a pie chart or bar graph.

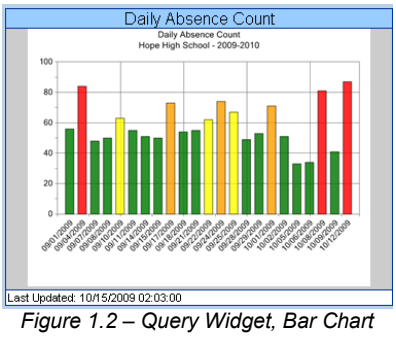


Figure 1.2 – Query Widget, Bar Chart

An **External Image** widget displays an image from an external website, such as a weather radar map or traffic update.

Figure 1.3 – External Image Widget

A **RSS Feed** widget shows the results of an RSS Feed.

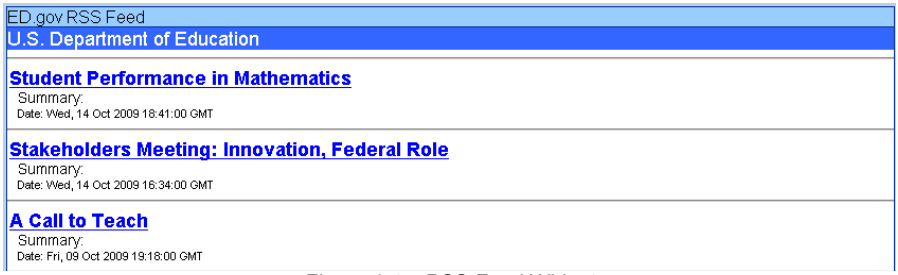


Figure 1.4 – RSS Feed Widget

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

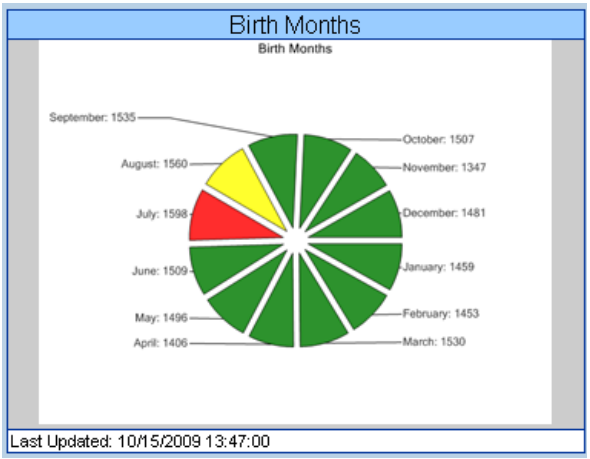


Figure 1.5 – SQL Query Widget, Pie Chart

CUSTOMIZING THE DASHBOARD

Once widgets have been created, users can choose which dashboard widgets are displayed on their Synergy SIS home pages. To customize the dashboard:

1. Open the Synergy SIS Navigation Tree by clicking the Tree button at the top of the page.

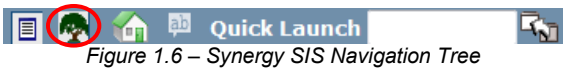


Figure 1.6 – Synergy SIS Navigation Tree

2. Click the **Synergy SIS** folder to expand it.

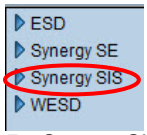


Figure 1.7 – Synergy SIS Folder

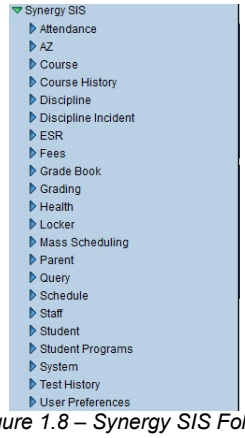


Figure 1.8 – Synergy SIS Folder Expanded

3. Click the **User Preferences** folder.

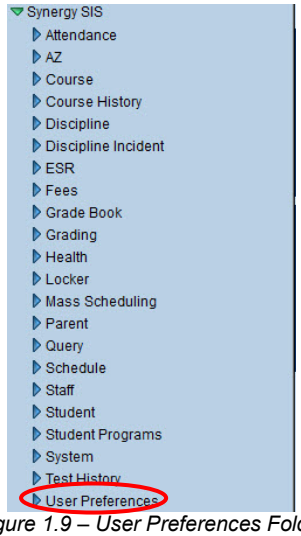


Figure 1.9 – User Preferences Folder

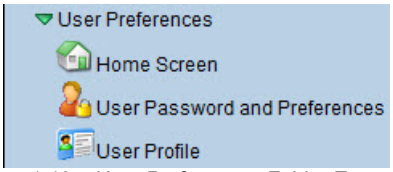


Figure 1.10 – User Preferences Folder Expanded

4. Click **User Profile**. The **User Profile** screen appears in the content pane on the right.

Figure 1.11 – User Profile View Icon

Note – Elsewhere in this guide, shorthand expresses navigation in the tree. For example, the navigation described in steps 2–4 above is expressed as: Go to **Synergy SIS > User Preferences > User Profile**.

5. Click the **POV** (Point of View) tab.

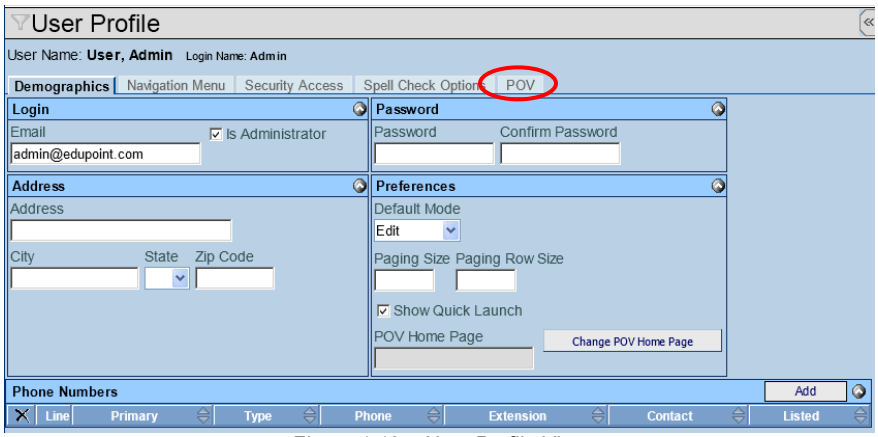


Figure 1.12 – User Profile View

6. In the **Dashboard Controls Per Row** box, enter the number of widgets to display in each row of widgets.

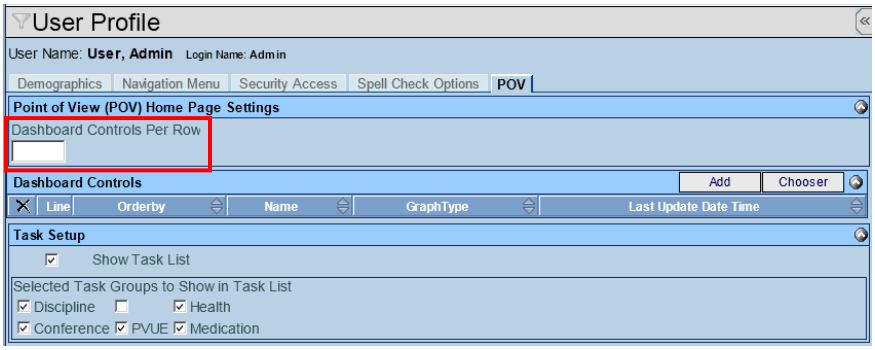


Figure 1.13 – User Profille View, POV Tab

Note – Regardless of the **Dashboard Controls Per Row** setting, an RSS Feed widget always takes the entire row.

7. Add dashboard widgets to the home page one at a time using the **Add** button, or add multiple widgets at once using the **Chooser** button.

Figure 1.14 – Dashboard Controls Grid

8. To add a single widget, click the **Add** button. The **Find: DashboardWidget** screen opens.

9. Enter all or part of the **Name** of the widget, and/or select the **Graph Type** to search for a specific widget, and click the **Find** button at the top of the screen. Widgets that meet the criteria entered are listed in the **Find Result** grid.

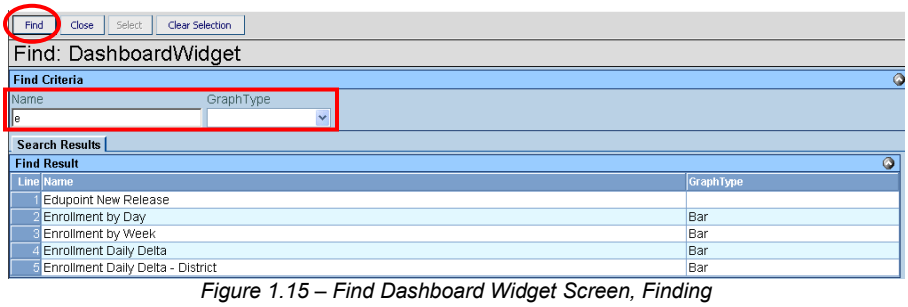


Figure 1.15 – Find Dashboard Widget Screen, Finding

10. Click the widget to add, and click the **Select** button at the top of the screen.

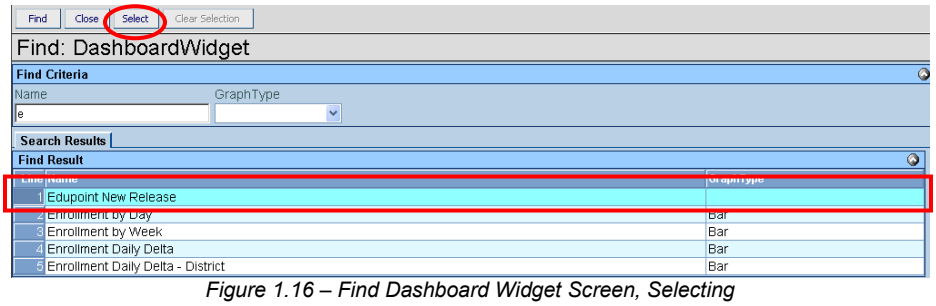


Figure 1.16 – Find Dashboard Widget Screen, Selecting

11. To add multiple widgets, click the **Chooser** button. The **Chooser** screen opens.

Figure 1.17 – Dashboard Controls Grid, Widget Added

12. Enter all or part of the **Name** of the widget and/or select the **Graph Type** to search for a specific widget, and click the **Find** button at the top of the screen. Widgets that meet the criteria entered are listed in the **Find Result** grid.

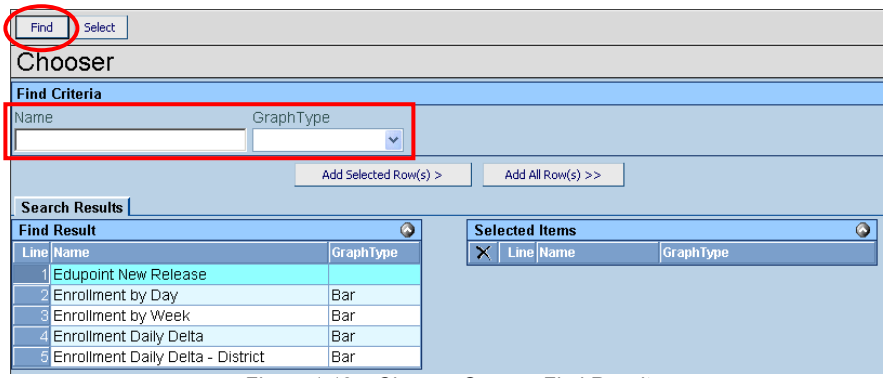


Figure 1.18 – Chooser Screen, Find Result

13. Click a widget to add. To select multiple widgets, hold down the Shift key and click all widgets needed, and click the **Add Selected Row(s)>** button. To add all of the widgets listed, click the **Add All Row(s) >** button.

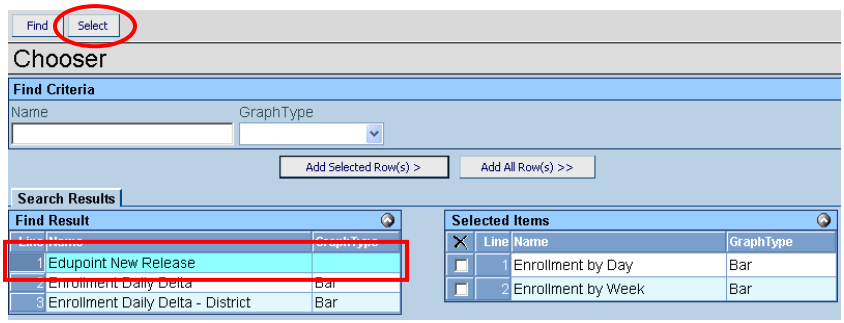


Figure 1.19 – Chooser Screen, Selected Items

14. If necessary, conduct another Find with different criteria, and repeat the process until all needed widgets are listed in the **Selected Items** grid. Click the **Select** button to add them to the **Dashboard Controls** grid.

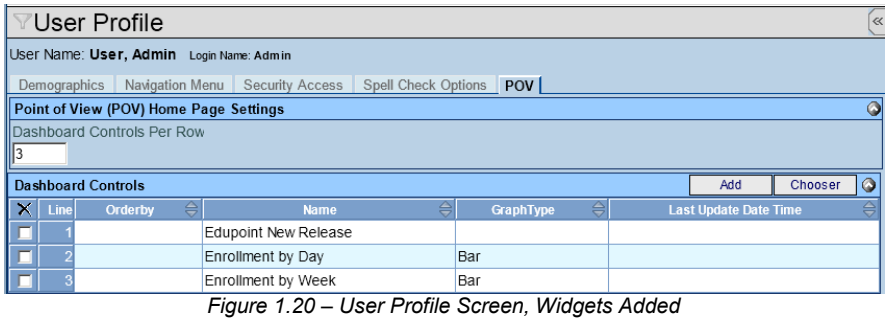


Figure 1.20 – User Profile Screen, Widgets Added

15. If desired, change the order in which widgets appear on the home page by entering sequence numbers in the **Order By** column.

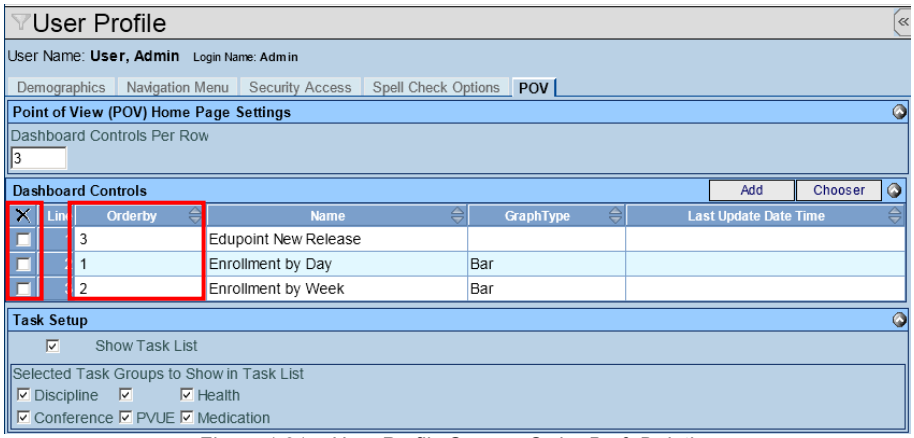


Figure 1.21 – User Profile Screen, Order By & Deleting

16. Click the **Save** button at the top of the screen to save the changes.

DASHBOARD WIDGET OPTIONS

Once a widget has been added to a user's home page, the user can do more than just view it (if the security setting for the widget allows). To enlarge the widget, click it, and a larger view of the graph or image opens.

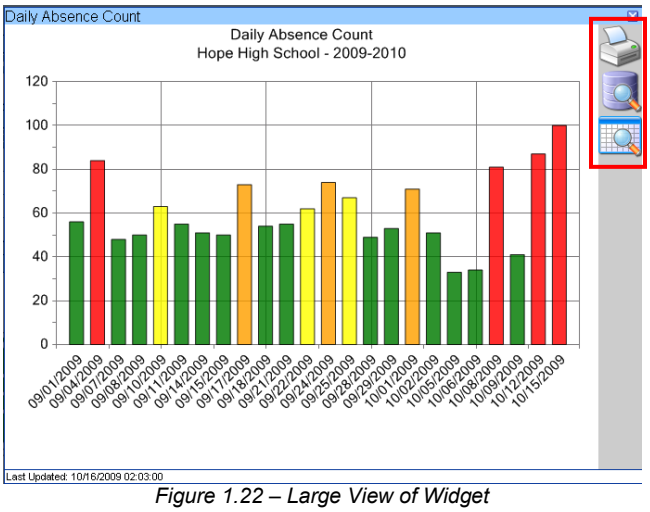


Figure 1.22 – Large View of Widget

To print the widget, click the printer icon. To view the underlying query, click the icon that looks like a canister. To go the source website, or export the results of a query to an Excel spreadsheet, click the icon that looks like a spreadsheet.

Chapter Two: CREATING DASHBOARD WIDGETS

This chapter covers:

- Creating a Query Widget
- Creating an External Image Widget
- Creating an RSS Feed Widget
- Creating a SQL Query Widget
- Viewing and Editing Dashboard Widgets
- Adding Widgets to User Home Pages

CREATING A WIDGET

To create a dashboard widget:

1. Go to **Synergy SIS > System > Setup > Dashboard Control**.
2. Click the **Add** button at the top of the screen.

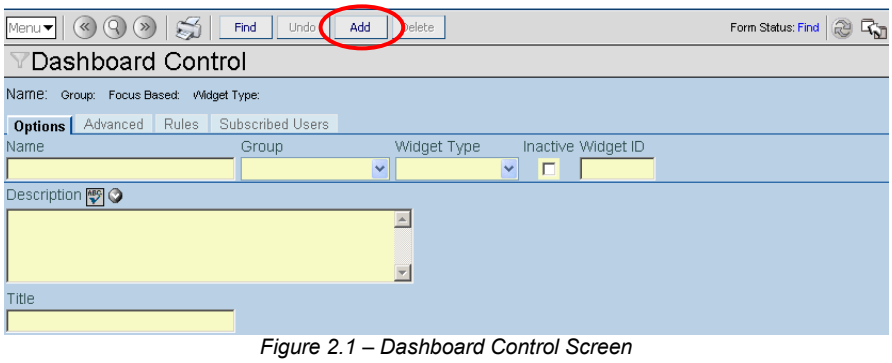


Figure 2.1 – Dashboard Control Screen

3. Enter a name for the new widget in the **Name** field.

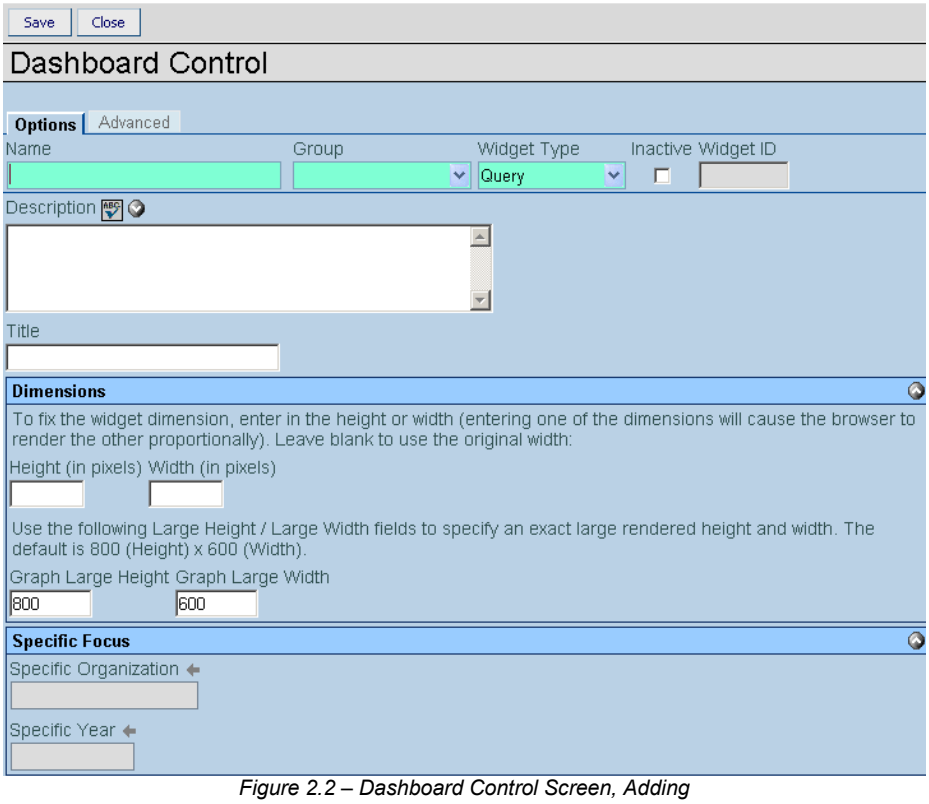


Figure 2.2 – Dashboard Control Screen, Adding

4. Select a **Group** to assign to the widget. The groups available are customizable by each district, and they are the same groups used in the Query screen. To customize the groups, modify the lookup table Revelation.QueryInfo.Group as outlined in Chapter Six of the *Synergy SIS – Query & Reporting Guide*.
5. Select the **Widget Type** that describes the source of the data displayed in the widget.

6. To remove a widget from everyone's home page, check the **Inactive** box. If checked, the dashboard widget is no longer available to be added as well.

   The **Widget ID** is a serialized number assigned by the Synergy SIS system, and cannot be changed.

7. To assist users in selecting which widgets may be helpful for display, enter a detailed explanation of the widget in the **Description** box.

8. Enter a **Title** to appear at the top of the widget on the home page.

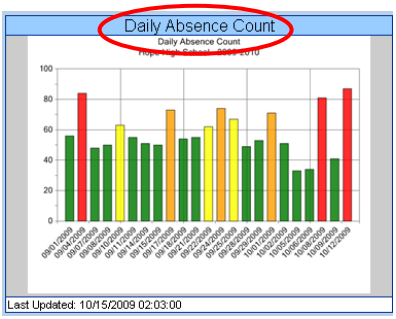


Figure 2.3 – Widget Title

9. The **Dimensions** section can reconfigure the size of the dashboard widget as displayed on the home page. The Height and Width controls the widget in the row, and the Graph Large dimensions control the size when the widget is clicked to enlarge it. To show the widget in a different size than the standard size, enter the dimensions in the boxes. Entering either the height or the width and the browser will render the other dimension proportionate to the value entered. Dimensions cannot exceed 999 in Height and Width pixels or 9999 in Graph Large Height and Graph Large Width. By default, the large graph is displayed in 800 x 600 dimensions. Dimensions cannot be set for a RSS Feed widget.

10. All the other options on the **Options** tab change, depending on the type of widget type selected. The options for each widget type are explained in the following sections in this chapter.

11. To specify how often the widget is updated, click the **Advanced** tab.

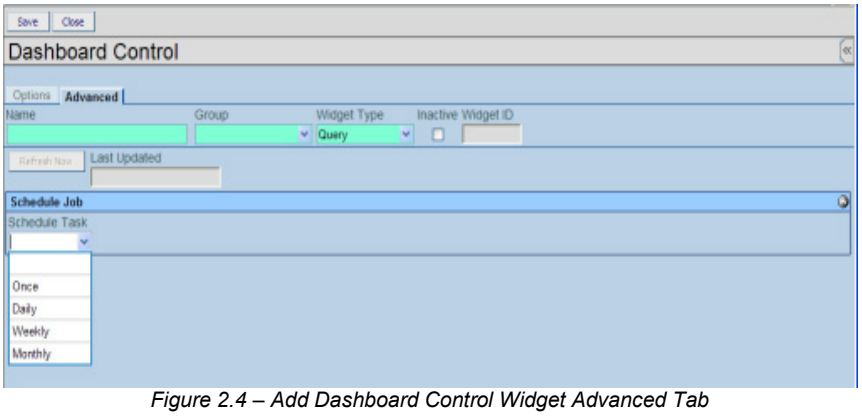


Figure 2.4 – Add Dashboard Control Widget Advanced Tab

12. Select the frequency of updates from the **Schedule Task** list. Widgets may be updated **Once**, **Daily**, **Weekly**, or **Monthly**.

13. If the widget should be updated every day, or every so many days, choose **Daily**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. The time should be entered in HH:MM AM/PM format. Enter the dates in MM/DD/YY format, or they may be selected by clicking the Calendar button. To run it every day enter 1 for **Day(s),** or enter the number of days between updates. To run it every so many hours every day, enter the number of **Hour(s)** between updates and enter the time the updates should end every day in the **Ending At** box.

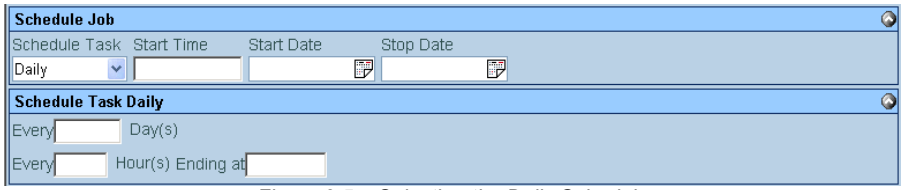


Figure 2.5 – Selecting the Daily Schedule

14. If the widget should be updated every so many weeks, choose **Weekly**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. The time should be entered in HH:MM AM/PM format. Enter the dates in MM/DD/YY format, or they may be selected by clicking the Calendar button. Enter the number of **Week(s)** between updates, and check the boxes to indicate on which **day(s) of the week** the updates should be run. Updates can also be run every so many hours every day by entering the number of **Hour(s)** between updates and enter the time the updates should end every day in the **Ending At** box.

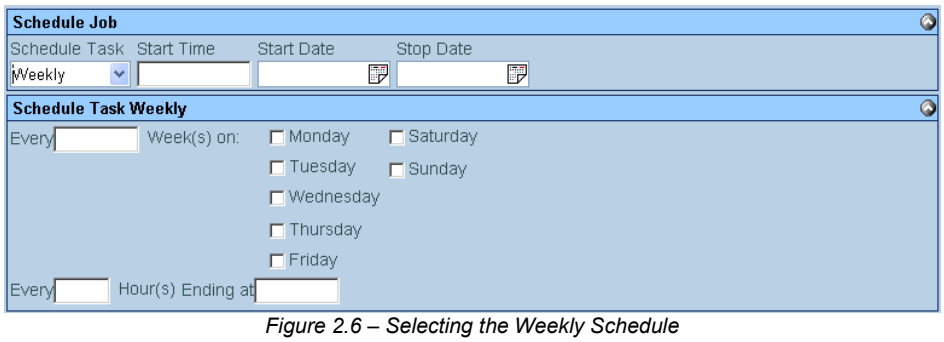


Figure 2.6 – Selecting the Weekly Schedule

15. If the widget should be updated every month, select **Monthly**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. To run it on a specific day of the month like the 21st or the 3rd, click **Day** and select the day from the list. To run it on a specific weekday, such as the first Monday, select which weekday from the list. Select months when the update should be run by checking boxes.

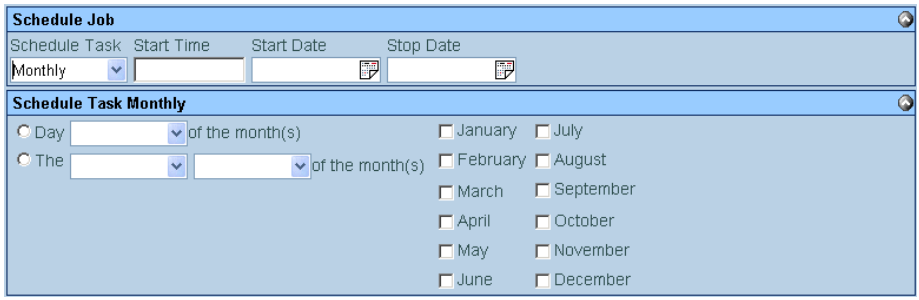


Figure 2.7 – Selecting the Monthly Schedule

16. Once all required fields (green boxes) and any other desired fields have been filled in, click the **Save** button at the top of the screen. This dashboard widget can now be added to the home page.

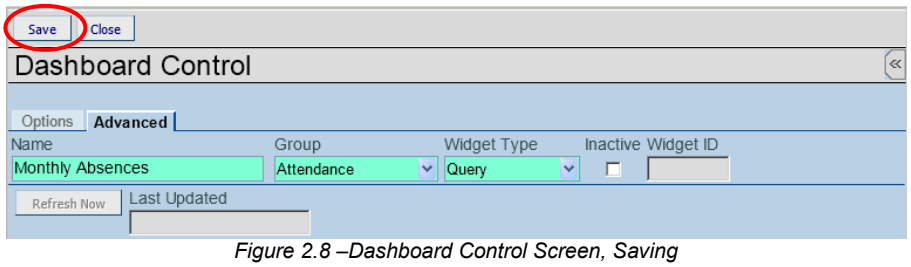


Figure 2.8 –Dashboard Control Screen, Saving

CREATING A QUERY WIDGET

A Query widget uses a public query to gather the data included in the widget chart. To create a Query widget:

1. Create a query and save it as a public query. For instructions on creating public queries, see the *Synergy SIS – Query and Reporting Guide*.
2. Follow the instructions outlined in the previous section on creating a widget, selecting **Query** as the **Widget Type**.

3. When **Query** is selected as the type of widget, the following options are available at the bottom of the **Options** tab on the **Dashboard Control** screen. To specify the focus for the public query, select a **Specific Organization** and **Specific Year**. To select a organization, click the gray arrow next to the **Specific Organization** box. The **Find: RevOrganization** screen opens.

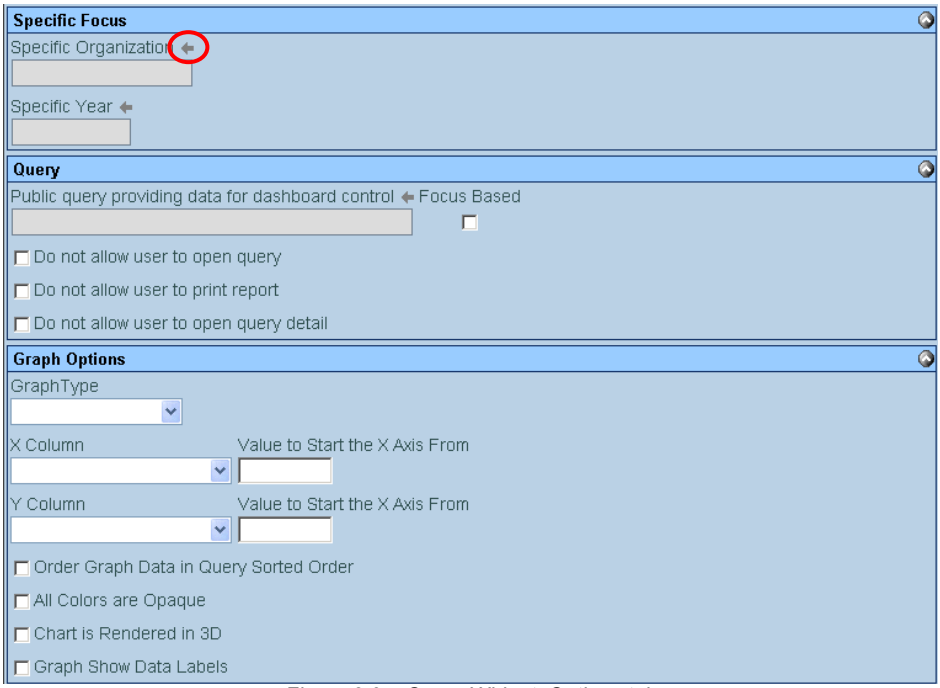


Figure 2.9 – Query Widget, Options tab

4. Enter all or part of the **Organization Name** and click the **Find** button to display a list of names.

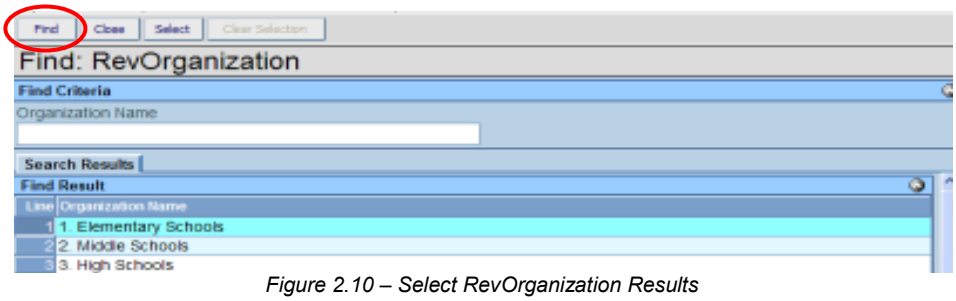


Figure 2.10 – Select RevOrganization Results

5. Click the specific organization name, and click the **Select** button.

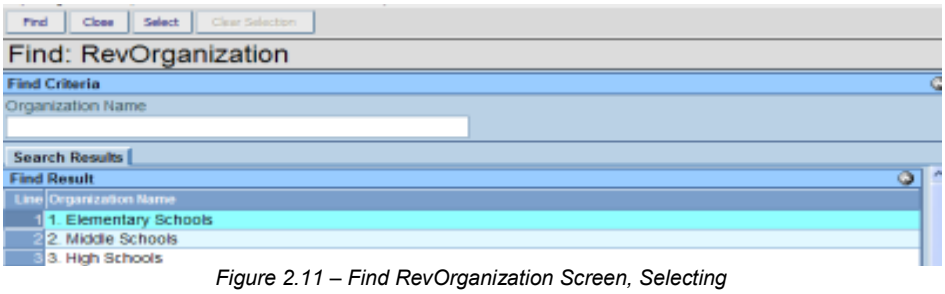


Figure 2.11 – Find RevOrganization Screen, Selecting

6. On the **Dashboard Control** screen, to select a **Specific Year**, click the gray arrow. The **Find: RevYear** screen opens.

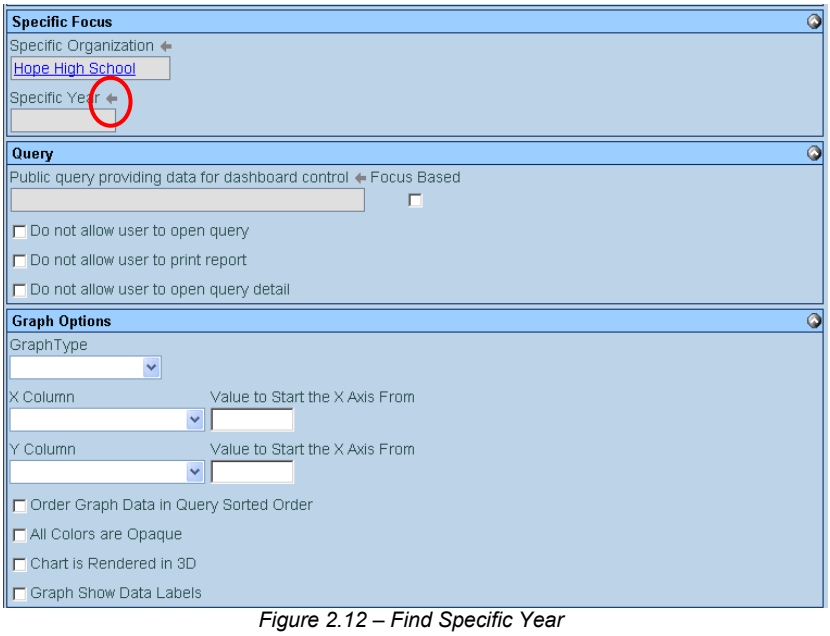


Figure 2.12 – Find Specific Year

7. Enter a school year and/or extension to search for, and click the **Find** button at the top of the screen to display a list of school years and extensions.

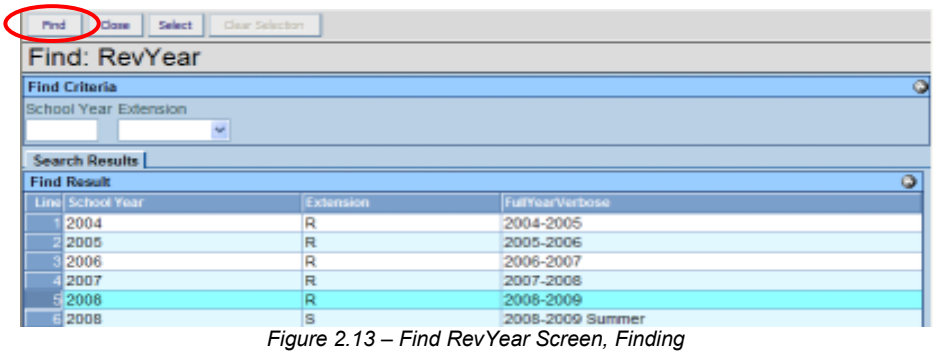


Figure 2.13 – Find RevYear Screen, Finding

8. Click the specific school year, and click the **Select** button.

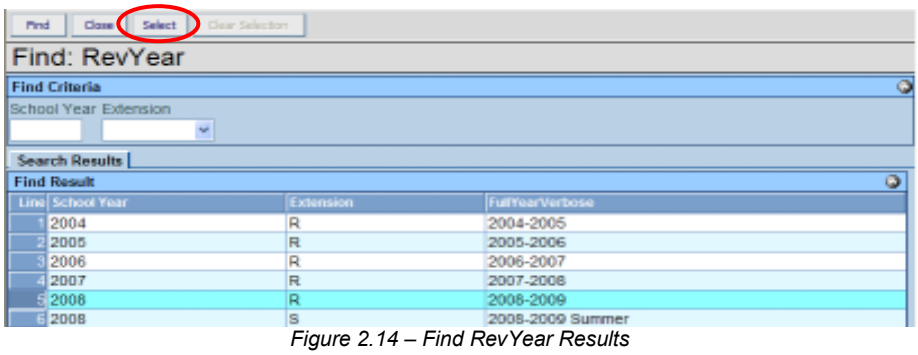
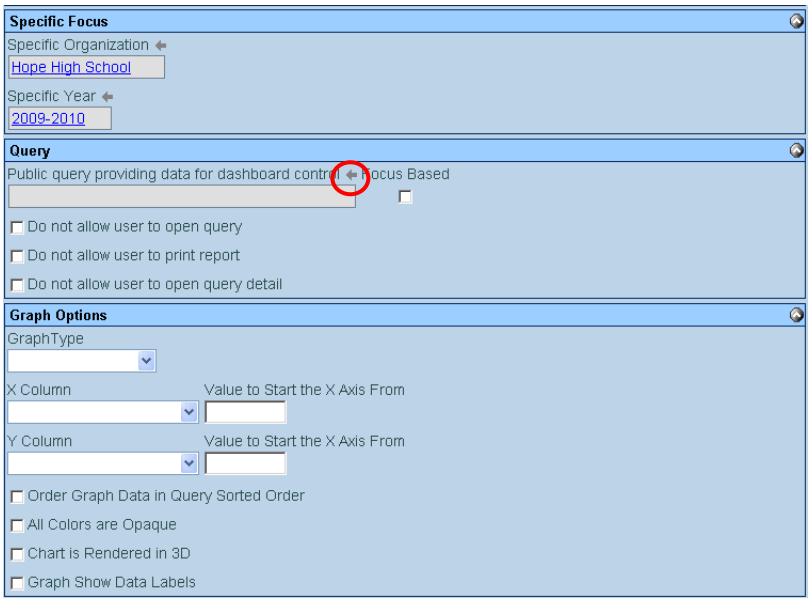


Figure 2.14 – Find RevYear Results

9. On the **Dashboard Control** screen, to select the query to be used for the widget, click the gray arrow next to the **Query** box.



10. Select a **Query Group** and/or **User Name** of the user who created the query, and/or enter all or part of the **Name** of the query, and click the **Find** button.

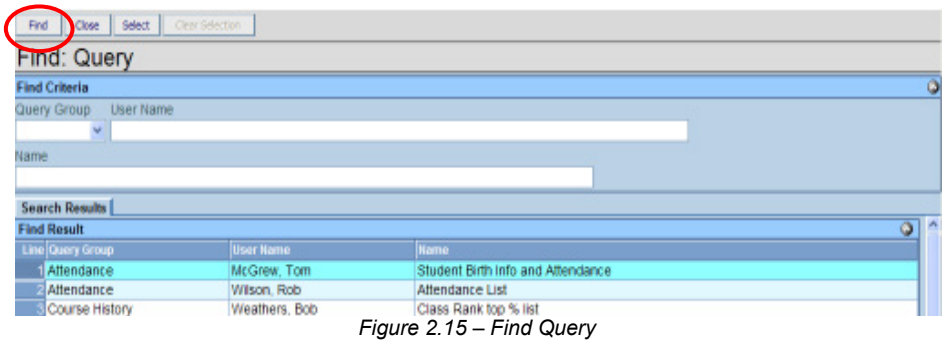


Figure 2.15 – Find Query

11. Click the specific query, and click the **Select** button.

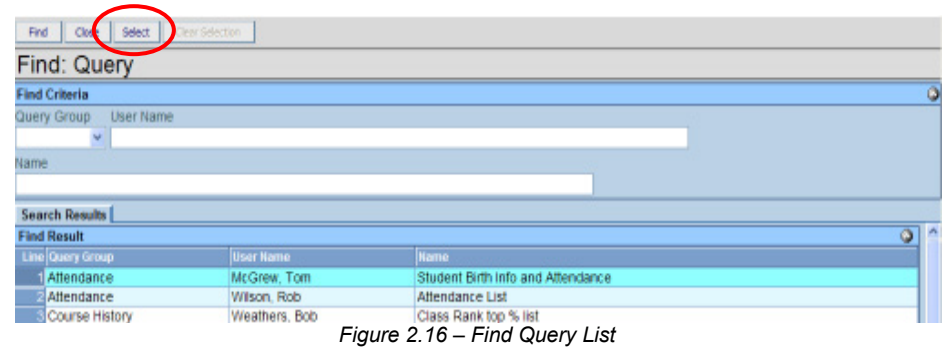


Figure 2.16 – Find Query List

12. On the **Dashboard Control** screen, to use the focus selected when the widget is displayed instead of a selected focus, check the **Focus Based** box.

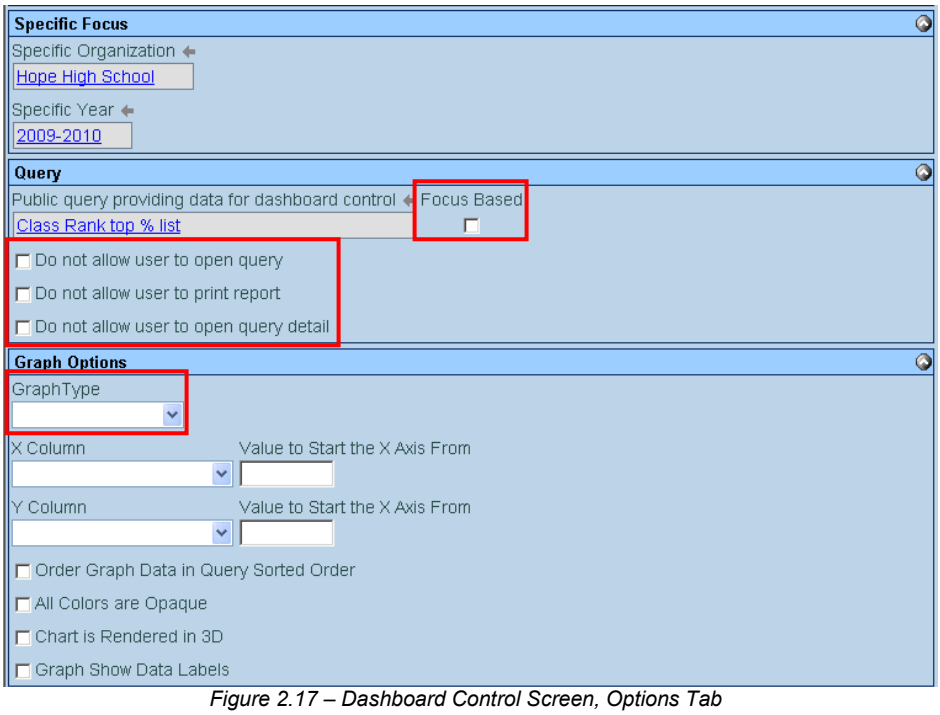


Figure 2.17 – Dashboard Control Screen, Options Tab

13. To prevent the user from opening the query used for the widget from the widget itself, check the box **Do not allow user to open query**. To prevent the user from printing the widget report, check the box **Do not allow user to print report**. To prevent the user from opening the data underlying the widget in an Excel spreadsheet, check the box **Do not allow user to open query detail**.

14. To select the type of graph to be used for the widget, select the **Graph Type**:

    - **Bar** graphs are used for comparing two or more values.
    - **Curve** graphs slope up or down depending upon the data.
    - **Doughnut** graphs show how proportions of data contribute to the whole. The size of the slice in a Doughnut graph ring is determined by the series value as a percentage of the total of all values.
    - **Line** graphs represent a series of data points connected together with a line and is useful to show data trends. This graph can be used to show how two items are related to each other.
    - **Pie** graphs represent an entire data category as a pie. Each data item in that category is shown as a pie wedge with each wedge being proportional to that data item's percentage of the sum of all the data being used for the graph.
    - **Surface** graphs show two independent variables on two axis, i.e. x-axis and y-axis, and a dependent variable on the z-axis. It is similar to a 3D image, where it appears as though the graph is coming out of the page.

15. Select which properties from the query should be used for the X Column and the Y Column of the graph from the **X Column** and **Y Column** lists. The **Value to Start the X Axis From** is the value that appears on the horizontal line of the graph. The **Value to Start the Y Axis From** is the value that appears on the vertical line of the graph.

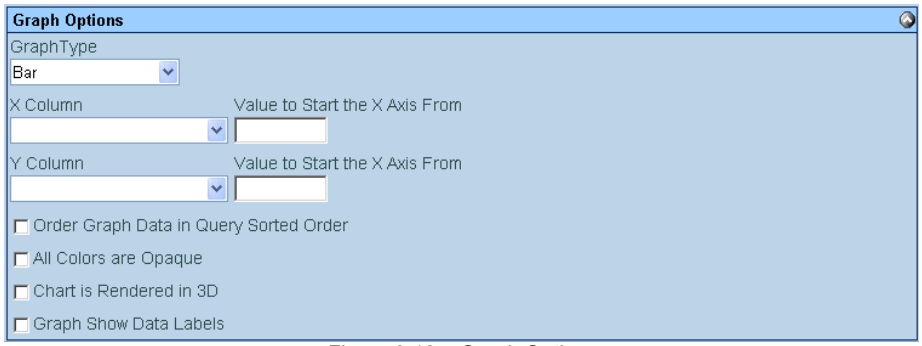


Figure 2.18 – Graph Options

16. To sort the data in the graph by the same sort order selected in the query, check the box **Order Graph Data in Query Sorted Order**.
17. To show the pieces of the graph in solid colors, check the box **All Colors are Opaque**.
18. To show the graph in 3D, check the box **Chart is Rendered in 3D**.
19. To show the names of the properties used on the X and Y axes, click the box **Graph Show Data Labels**.
20. Once all required fields (green boxes) and any other desired fields have been filled in, click the **Save** button at the top of the screen. This dashboard widget can now be added to the home page.
21. Once the widget has been saved, two additional tabs are available – the **Rules** tab and the **Subscribed Users** tab. The **Subscribed Users** tab shows all the users who have this widget on their home pages, and users can be added here as well. For more information about the **Subscribed Users** tab, see the section on Adding Widgets to User Home Pages later in this chapter.
22. Click the **Rules** tab to select what colors are used for the data points in the graph.

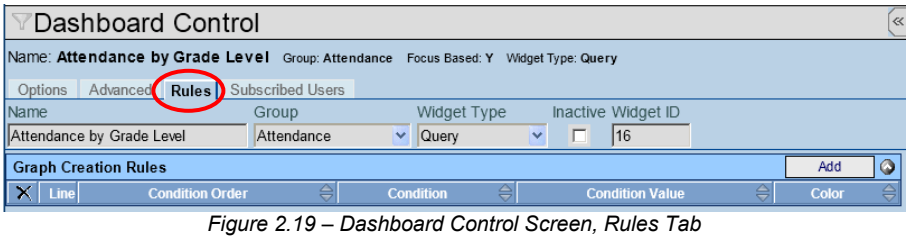


Figure 2.19 – Dashboard Control Screen, Rules Tab

23. Click the **Add** button to create a new rule.

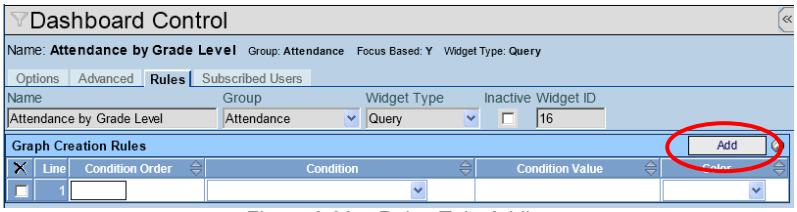


Figure 2.20 – Rules Tab, Adding

24. If multiple conditions will be used, select the order in which they are applied by entering the number of the order in the **Condition Order** columns.
25. Select the comparison to use on the data from the **Condition** list. Data can be compared by **Less Than, Less or Equal, Equal, Greater Than, Greater or Equal, Decrease in prior value (in %), Increase from prior value (in %), Decrease from prior raw value**, or **Increase from prior raw value**.
26. Enter the value to be used for the comparison in the **Condition Value** column.
27. Select the color to indicate when the condition has been met from the **Color** list. There are 10 colors to choose from.

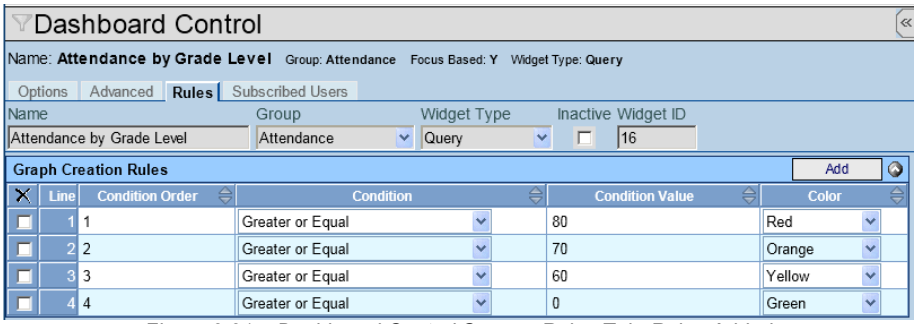


Figure 2.21 – Dashboard Control Screen, Rules Tab, Rules Added

28. To add another rule, click the **Add** button again. An unlimited number of rules may be added.
29. Click the **Save** button at the top of the screen to save the changes.

CREATING AN EXTERNAL IMAGE WIDGET

The External Image widget allows images from an outside source to be displayed.

To create an External Image widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **External Image** as the **Widget Type**.
2. Enter the URL for the image in the **External URL Path** field.

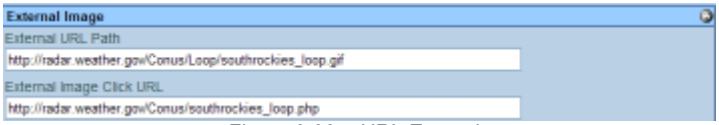


Figure 2.22 – URL Example

3. Enter the URL of the page that should be displayed when the user clicks on the widget in the **External Image Click URL** field.
4. Once all required fields (green boxes) and any other desired fields have been filled in, click the **Save** button at the top of the screen.

CREATING AN RSS FEED WIDGET

The RSS Feed widget contains frequently updated content available on the web which is automatically downloaded to the widget via an RSS feed.

To create an RSS Feed widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **RSS Feed** as the **Widget Type**.
2. Enter the URL for the RSS Feed in the **RSS Feed URL Path** box.

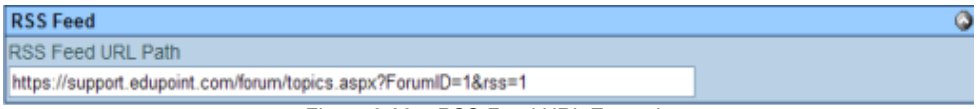


Figure 2.23 – RSS Feed URL Example

3. Once all required fields (green boxes) and any other desired fields have been filled in, click the **Save** button at the top of the screen.

CREATING A SQL QUERY WIDGET

To create a SQL Query widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **SQL Query** as the **Widget Type**.
2. When **Query** is selected as the type of widget, the following options are available at the bottom of the **Options** tab on the **Dashboard Control** screen. Select the type of database to be used, either **MS SQL** or **Oracle**.

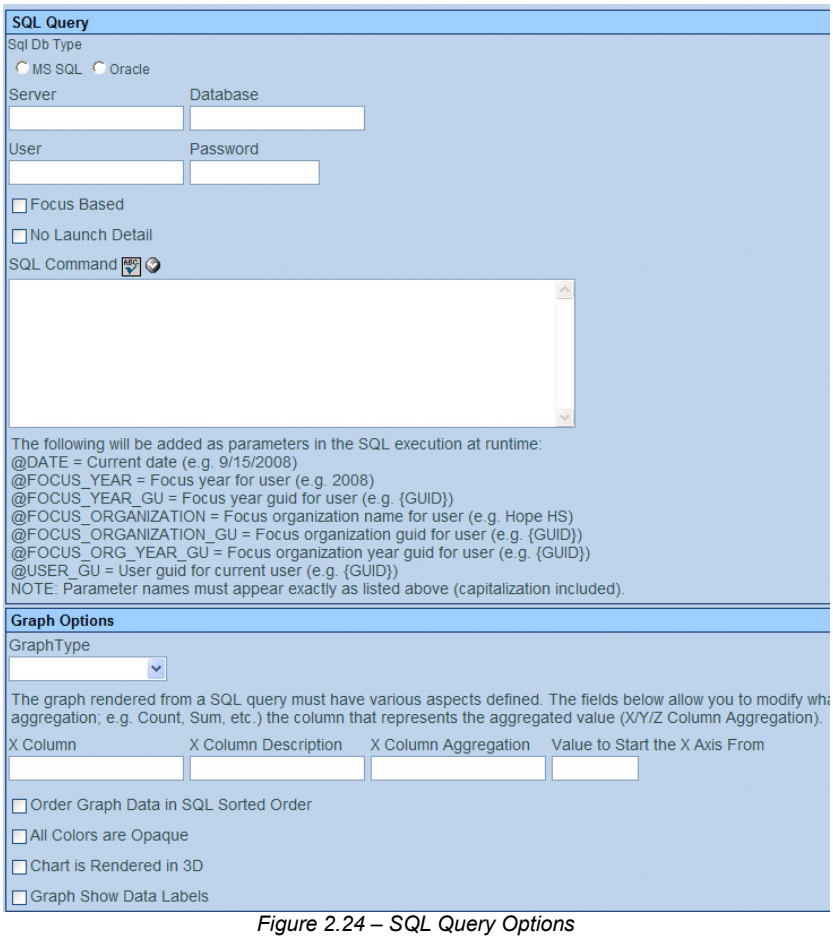


Figure 2.24 – SQL Query Options

3. Enter the name of the **Server** that hosts the database, and the name of the **Database**. Enter the **User Name** and **Password** to be used to access the database (generally *rev* and *rev*).
4. To use the current focus of the user when running the query, check the box **Focus Based**. Otherwise, the organization adn year to be used will be taken from the SQL query.
5. Check the box **No Launch Detail** to suppress the system messages showing the progression of the query. While creating the widget, it may be helpful to leave this unchecked to see any error messages.

6. Enter the query into the **SQL Command** box. Below the SQL Command box, a list of standard parameters that can be used as variables in the query is shown. These additional parameters will be added when the query is run.
7. To select the type of graph to be used for the widget, select the **Graph Type** from the list. There are 6 graph types:
    - **Bar** graphs are used for comparing two or more values.
    - **Curve** graphs slope up or down depending upon the data.
    - **Doughnut** graphs show how proportions of data contribute to the whole. The size of the slice in a Doughnut graph ring is determined by the series value as a percentage of the total of all values.
    - **Line** graphs represent a series of data points connected together with a line and is useful to show data trends. This graph can be used to show how two items are related to each other.
    - **Pie** graphs represent an entire data category as a pie. Each data item in that category is shown as a pie wedge with each wedge being proportional to that data item's percentage of the sum of all the data being used for the graph.
    - **Surface** graphs show two independent variables on the x-axis and y-axis, and a dependent variable on the z-axis. It is similar to a 3D image, where it appears as though the graph is coming out of the page.
8. Select which fields from the query should be used for the **X Column** box. Enter the title that should be shown for the X column in the **X Column Description** box. Enter the type of aggregation to use on the data, such as TOTAL or COUNT, in the **X Column Aggregation** box. To change the number to start on the X axis from 0 to a different value, enter the number in the **Value to Start the X Axis From**.

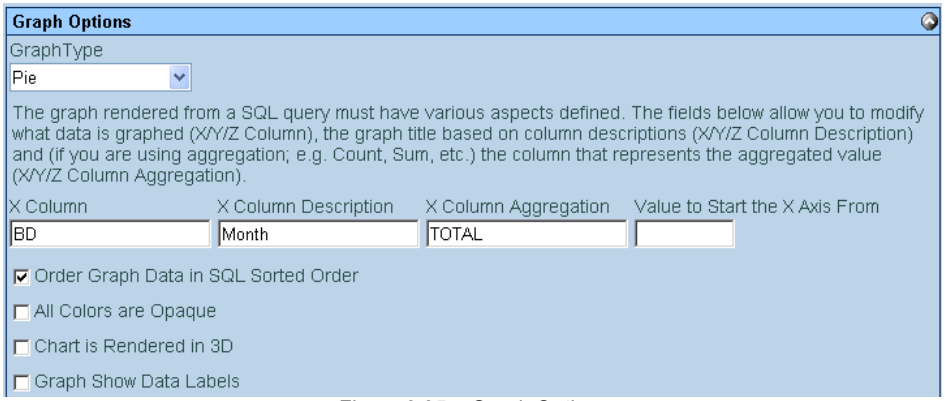


Figure 2.25 – Graph Options

9. To sort the data in the graph by the same sort order selected in the query, check the box **Order Graph Data in Query Sorted Order**.
10. To show the pieces of the graph in solid colors, check the box **All Colors are Opaque**.
11. To show the graph in 3D, check the box **Chart is Rendered in 3D**.

12. To show the names of the properties used on the X and Y axes, click the box **Graph Show Data Labels**.
13. Once all required fields (green boxes) and any other desired fields have been filled in, click the **Save** button at the top of the screen. This dashboard widget can now be added to the home page.
14. Once the widget has been saved, two additional tabs are available – the **Rules** tab and the **Subscribed Users** tab. The **Subscribed Users** tab shows all the users who have this widget on their home page, and users can be added here as well. For more information about the **Subscribed Users** tab, see the section on Adding Widgets to User Home Pages later in this chapter.
15. Click the **Rules** tab to select what colors are used for the data points in the graph.

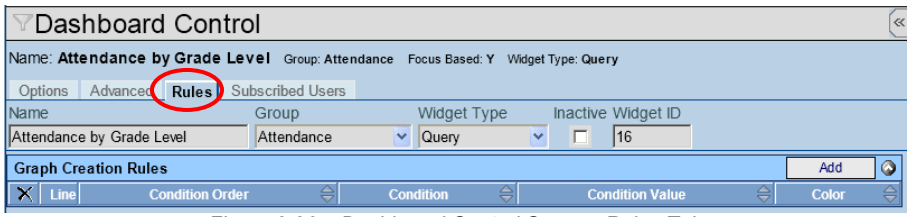


Figure 2.26 – Dashboard Control Screen, Rules Tab

16. Click the **Add** button to create a new rule.

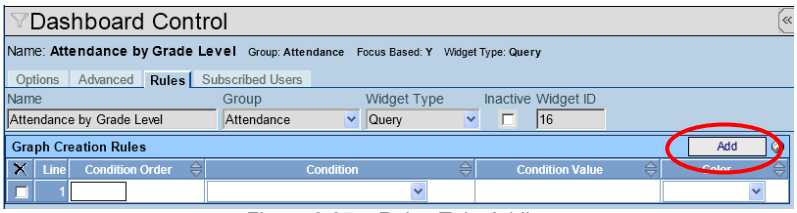


Figure 2.27 – Rules Tab, Adding

17. If multiple conditions will be used, select the order in which they are applied by entering the number of the order in the **Condition Order** columns.
18. Select the comparison to use on the data from the **Condition** list. Data can be compared by **Less Than, Less or Equal, Equal, Greater Than, Greater or Equal, Decrease in prior value (in %), Increase from prior value (in %), Decrease from prior raw value**, or **Increase from prior raw value**.
19. Enter the value to be used for the comparison in the **Condition Value** column.
20. Select the color to indicate when the condition has been met from the **Color** list. There are 10 colors to choose from.

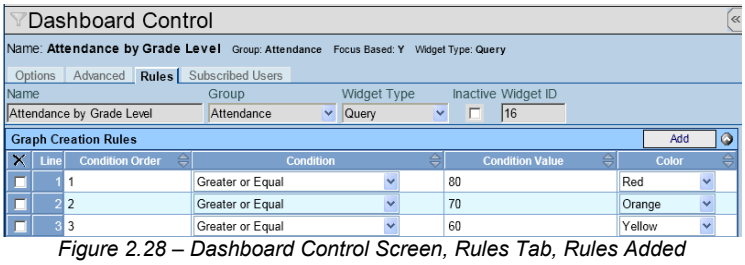


Figure 2.28 – Dashboard Control Screen, Rules Tab, Rules Added

21. To add another rule, click the **Add** button again. An unlimited number of rules can be added. Click the **Save** button at the top of the screen to save the changes.

VIEWING AND EDITING DASHBOARD WIDGETS

To find a dashboard widget there are two methods: using the scroll buttons or Find mode. To scroll through the dashboard widget:

1. Go to **Synergy SIS > System > Setup > Dashboard Control**.
2. Click the Next button at the top of the screen to advance to the first dashboard widgets. Dashboard widgets are sorted alphabetically by dashboard control name.

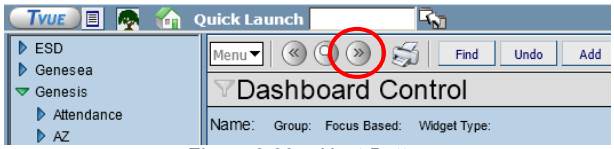


Figure 2.29 – Next Button

3. To scroll in reverse alphabetical order, click the Previous button at the top of the screen.

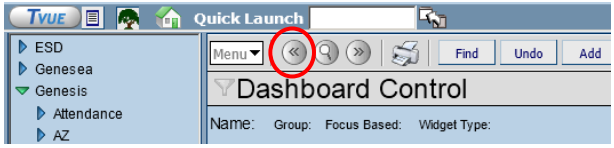


Figure 2.30 – Previous Button

4. Continue clicking the scroll buttons until the desired dashboard control appears.
5. To use Find mode to look for the student records, click the Find Mode button.

Figure 2.31 – Find Mode

6. Enter either the entire dashboard widget name or the first part of the dashboard widget name in the **Name** box.

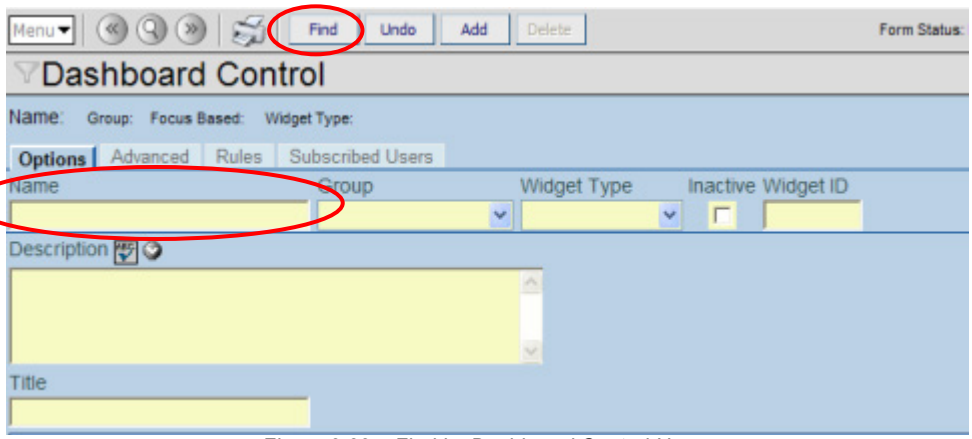


Figure 2.32 – Find by Dashboard Control Name

7. Click the **Find** button, and then use the scroll buttons if needed to find the exact dashboard control widget.

> **Note:** In Find Mode, dashboard widgets can be found by searching any of the yellow fields on the screen. Entering anything in any box other than the name box opens a window with all dashboard widgets matching the criteria entered. To select a dashboard widget, click the name and close the window.

8. Click and type in any of the boxes that show in white to edit the values. To edit the top row of data (Name, Group, Widget Type, Inactive), click the **Menu** button and select **Edit DashboardWidget Data**.

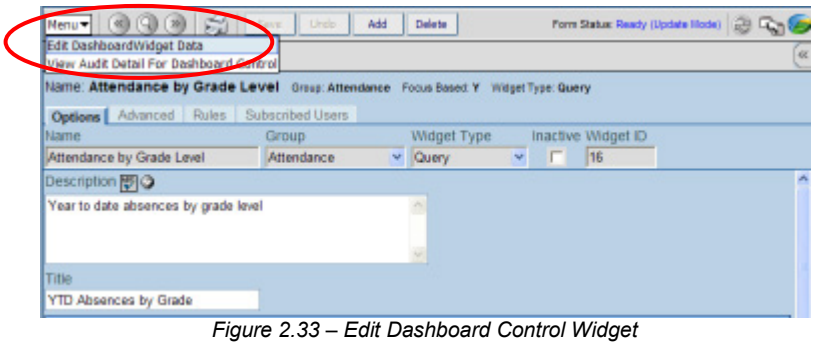


Figure 2.33 – Edit Dashboard Control Widget

9. Once editing has been completed, click the **Save** button to save the changes made. Note that once a dashboard widget has been edited, the modified version will not display on the home pages until it has been refreshed.

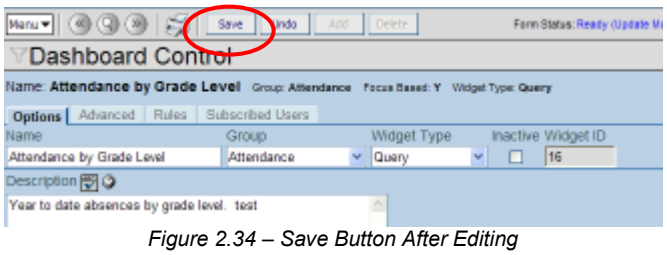


Figure 2.34 – Save Button After Editing

10. To update or refresh a widget on all subscribed users' home pages, click the **Advanced** tab of the **Dashboard Control** screen, and click the **Refresh Now** button.

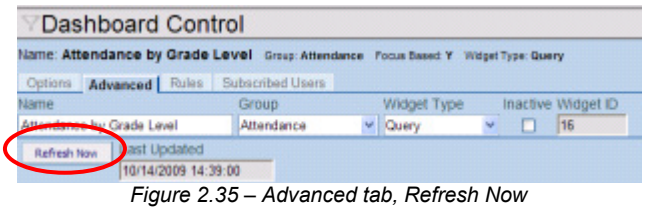


Figure 2.35 – Advanced tab, Refresh Now

11. Wait while the **Job Status** box provides updates on the status of the refresh.

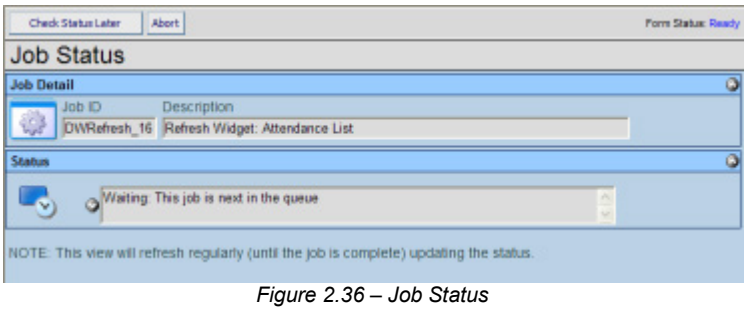


Figure 2.36 – Job Status

When the refresh process is completed, another window opens that lists the results of the refresh and which users' home pages were updated.

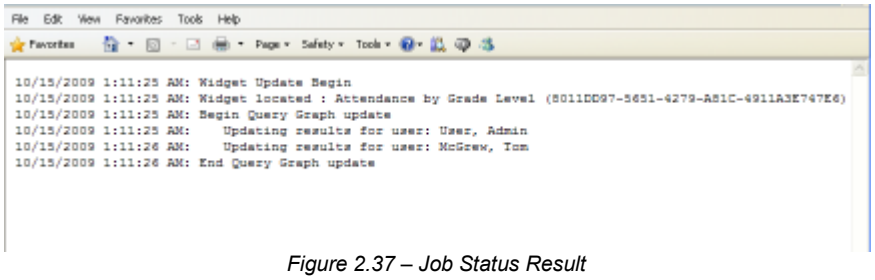


Figure 2.37 – Job Status Result

To find what changes have been made to a dashboard widget and who made the changes, click the **Menu** button and select **View Audit Detail for Dashboard Control**.

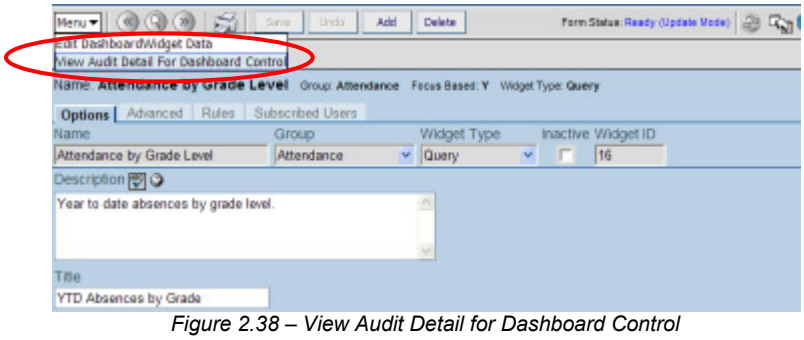


Figure 2.38 – View Audit Detail for Dashboard Control

The **Audit Trail History** screen lists all changes made to the dashboard control widget, including what was changed, who changed it, and when.

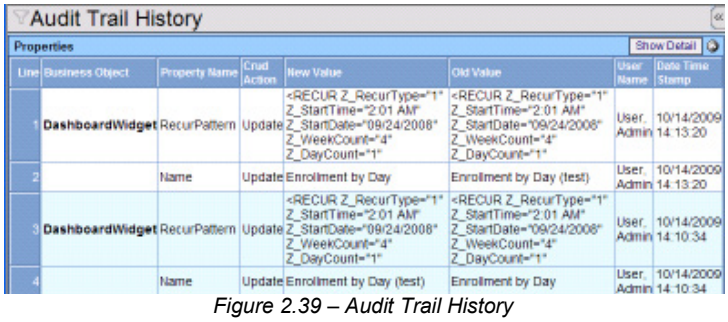


Figure 2.39 – Audit Trail History

To delete a dashboard widget:

1. Find the dashboard widget to delete using either the scroll buttons or Find mode.
2. Click the **Delete** button at the top of the screen.

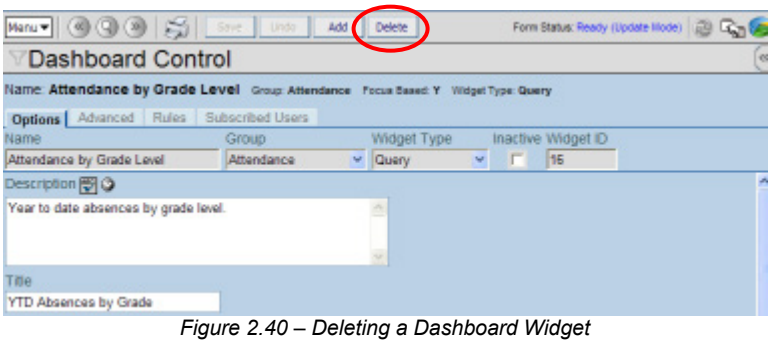


Figure 2.40 – Deleting a Dashboard Widget

3. Click the **OK** button to confirm the deletion.

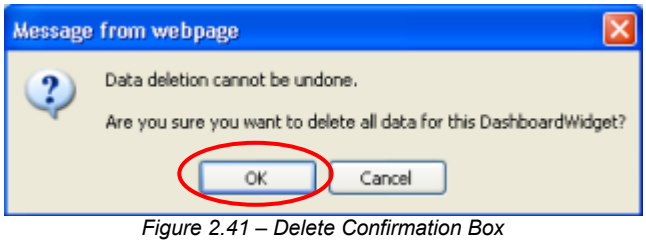


Figure 2.41 – Delete Confirmation Box

ADDING WIDGETS TO USER HOME PAGES

While users can select which widgets to add to their home pages themselves (as outlined in the section on Customizing the Dashboard in Chapter One of this guide), administrators can also add widgets to user home pages through either the POV tab of the User screen or through the Dashboard Control screen. The User screen lists all widgets by user, and allows administrators to set the order in which they appear on the home pages. Through the Dashboard Control screen, administrators can see which users are using a particular widget and add or remove users to a widget. Since the widget order cannot be set in the Dashboard Control screen, widgets added here will appear at the top of the home pages. To add or remove a user from a widget:

1. In the **Dashboard Control** screen, locate the widget using either the scroll buttons or Find mode.
2. Click the **Subscribed Users** tab.

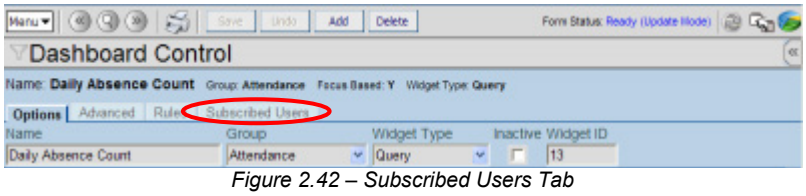


Figure 2.42 – Subscribed Users Tab

3. To add a user, click the **Chooser** button.

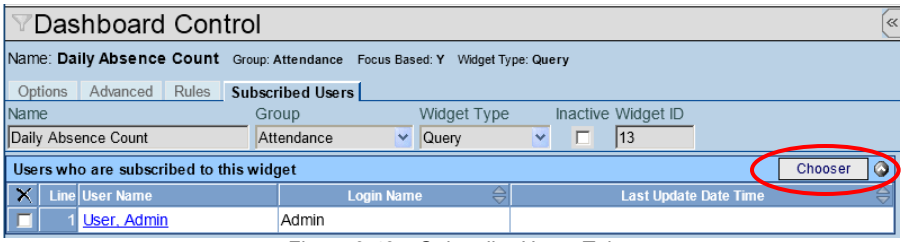


Figure 2.43 – Subscribe Users Tab

4. Enter all or part of the **Last Name**, **First Name**, and/or **Login Name**, and click the **Find** button. The users matching the criteria entered are listed in the **Find Result** section.

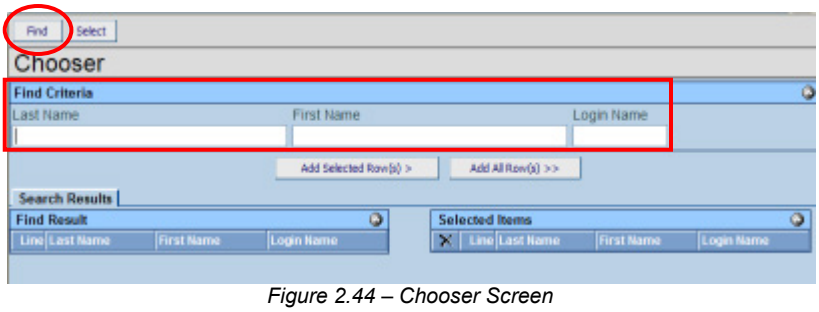


Figure 2.44 – Chooser Screen

5. Click a user name. To select multiple users, hold down the Shift key while selecting names, and click the **Add Selected Row(s)** button. Or click the **Add All Row(s)** button to add all listed users.

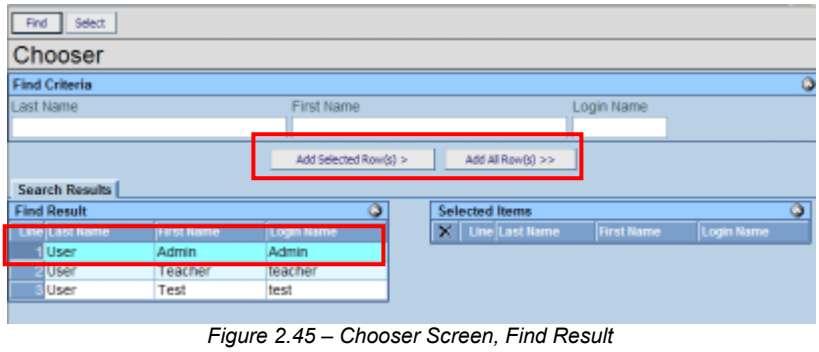


Figure 2.45 – Chooser Screen, Find Result

6. Click the **Select** button to add all of the users in the **Selected Items** grid to the dashboard widget.

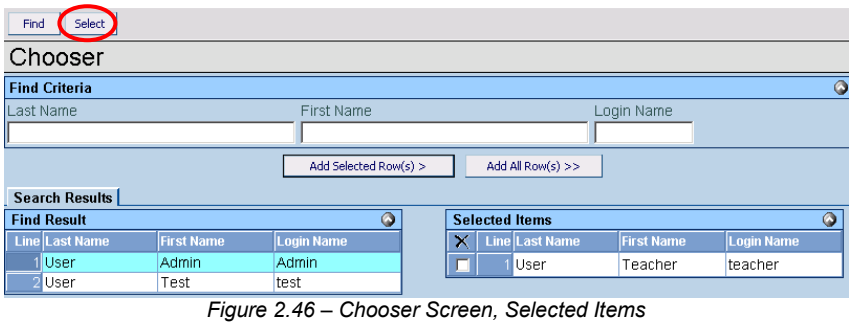


Figure 2.46 – Chooser Screen, Selected Items

Chapter Three:
SAMPLE DASHBOARD WIDGETS

This chapter covers:

- Sample dashboard widgets

ATTENDANCE BY GRADE

This is a Query widget that shows the year-to-date absences by grade level.

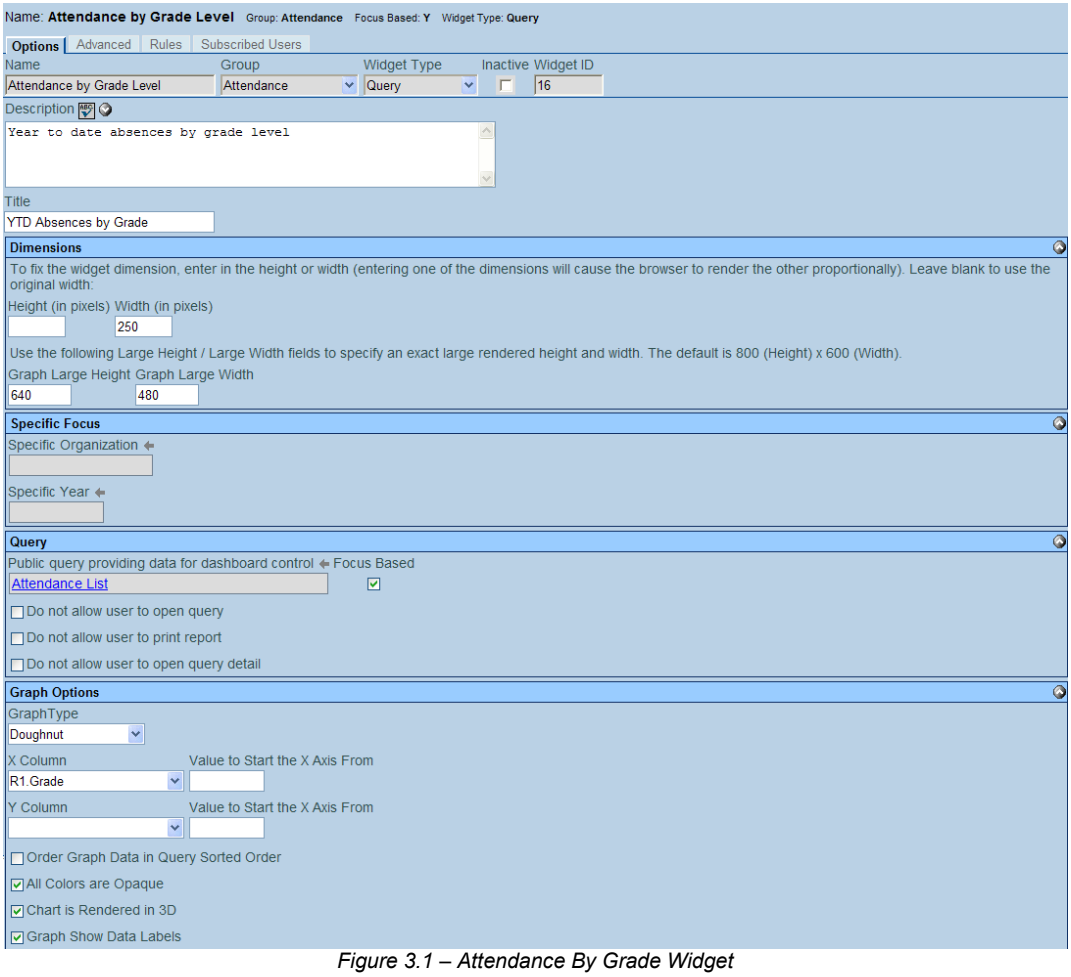


Figure 3.1 – Attendance By Grade Widget

The **Attendance List** public query used for the widget:

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

The query can be copied and pasted into the **Type in Query** tab of the **Query** screen to create this public query.

BIRTH MONTH

This is a SQL Query widget that shows the number of students born in each month.

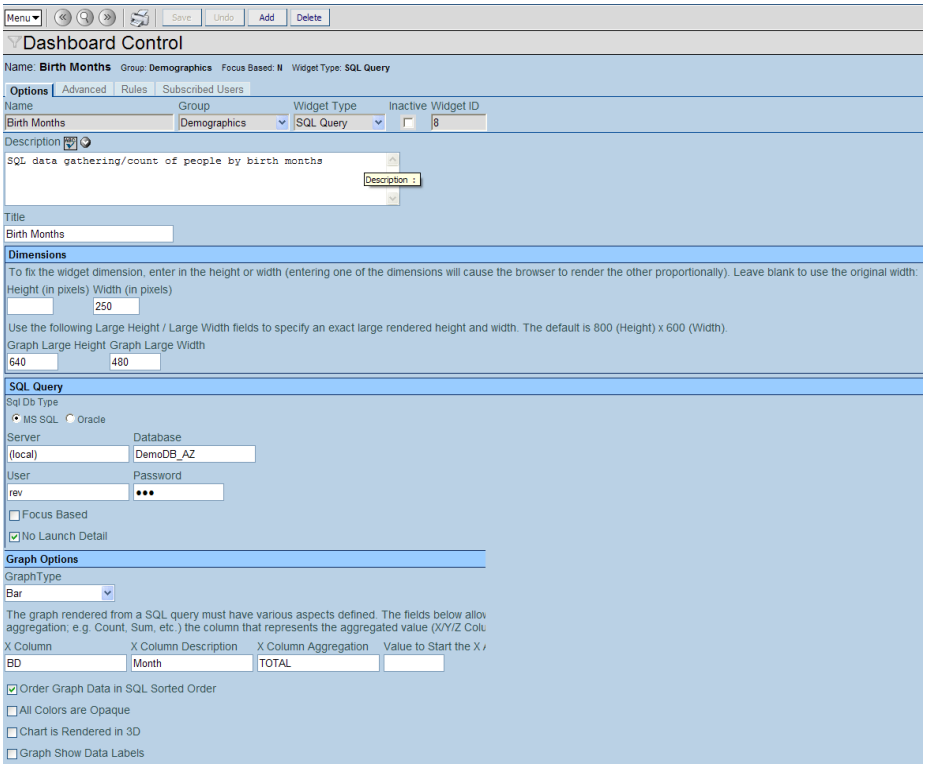


Figure 3.2 – Birth Month Widget

The SQL Query used in this widget is:

```
select BD =
  case MONTH(BIRTH_DATE)
        WHEN '1' THEN 'January'
        WHEN '2' THEN 'February'
        WHEN '3' THEN 'March'
        WHEN '4' THEN 'April'
        WHEN '5' THEN 'May'
        WHEN '6' THEN 'June'
        WHEN '7' THEN 'July'
        WHEN '8' THEN 'August'
        WHEN '9' THEN 'September'
        WHEN '10' THEN 'October'
        WHEN '11' THEN 'November'
        WHEN '12' THEN 'December'
        end, count(*) as TOTAL

from REV_PERSON
where BIRTH_DATE is not null
GROUP BY MONTH(BIRTH_DATE)
ORDER BY MONTH(BIRTH_DATE)
```


DAILY ABSENT COUNT

This is a Query widget that shows the absences by day for all grades at a given school.

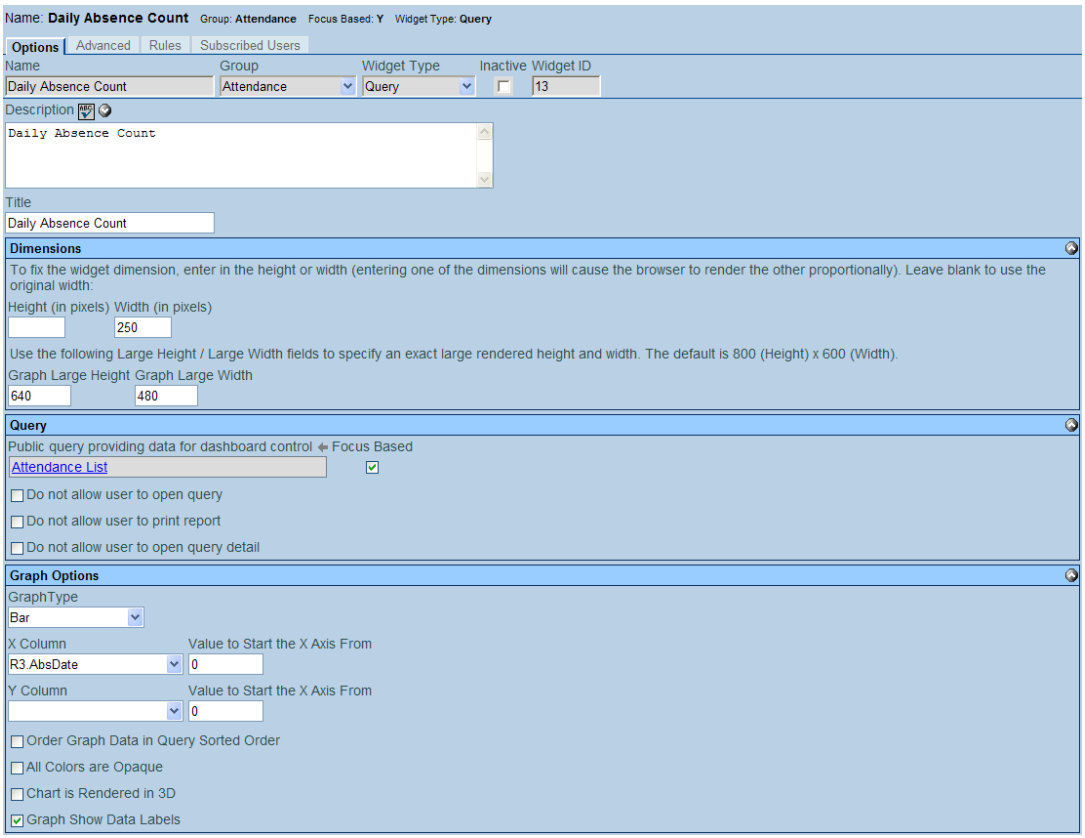


Figure 3.3 – Daily Absence Count Widget

The **Attendance List** public query used for the widget is:

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

The **Rules** set for the colors of the bar graph are:

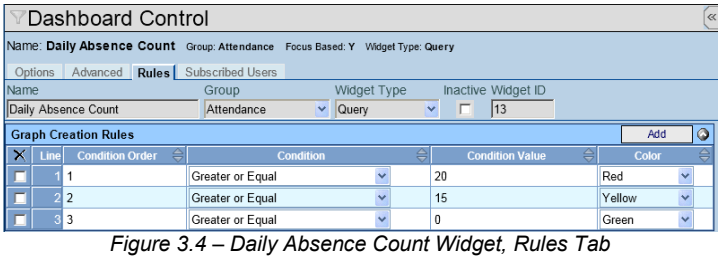


Figure 3.4 – Daily Absence Count Widget, Rules Tab

ENROLLMENT BY DAY

This is a SQL Query widget that shows the number of students enrolled each day at the school in focus.

Figure 3.5 – Enrollment By Day Widget

The **SQL Query** used in this widget is:

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (TDAY smalldatetime, ENRCNT int, DOW int)
declare @curEnr int

set @curDt = @startDt

while @curDt <= @stopDt
begin
 set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
 insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt));
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(TDAY)) + '/' + str (day(TDAY)) + '/' + str (year(TDAY)), ' ', '') as
'TDAY', ENRCNT from @result
```

The **Rules** set for the colors of the bar graph are:

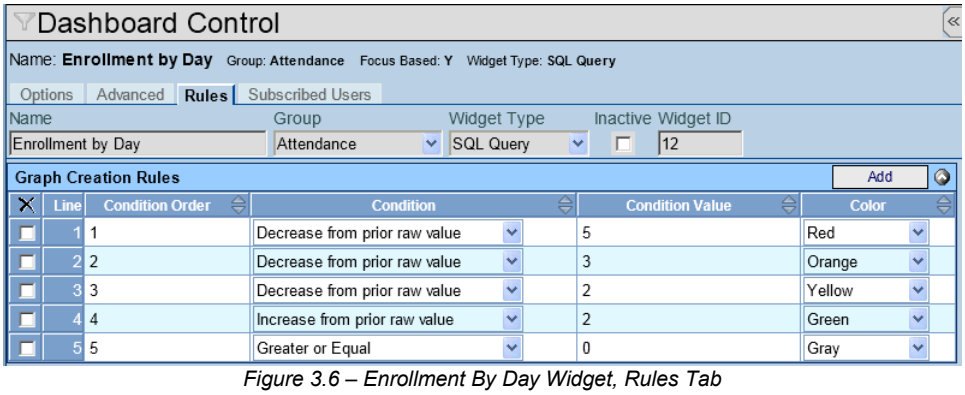


Figure 3.6 – Enrollment By Day Widget, Rules Tab

ENROLLMENT BY WEEK

This is a SQL Query widget that shows the number of students enrolled each week at the school in focus.

Figure 3.7 – Enrollment By Week Widget

The SQL Query used in this widget is:

```
-- Enrollment by week

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = '09/09/2008'
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (WEEK smalldatetime, ENRCNT int)
declare @curEnr int

set @curDt = @startDt

while @curDt < @stopDt
begin
 set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu
and ssy.ENTER_DATE <= @curDt
and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
 insert into @result values(@curDt, @curEnr)
 set @curDt = dateadd(week, 1, @curDt)
end;

select replace (str (month(WEEK)) + '/' + str (day(WEEK)) + '/' + str (year(WEEK)), ' ', '') as
'WEEK', ENRCNT from @result
```


ENROLLMENT DAILY DELTA

This is a SQL Query that displays the change in the number of enrolled students from day to day for the school in focus.

Figure 3.8 – Enrollment Daily Delta Widget

The SQL Query used in this widget is:

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int, DELTA int)
declare @curEnr int
declare @lastVal int
declare @delta int

set @curDt = @startDt
set @lastVal = 0

while @curDt <= @stopDt
begin
 set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
 inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)

where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and oyr.organization_year_gu = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))

set @delta = @curEnr - @lastVal
if (@lastVal = 0)
  set @delta = 0
set @lastVal = @curEnr

if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
 insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt), @delta);
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' + str (year(EDAY)), ' ', '') as 'DAY',
 ENRCNT, DELTA from @result
```

The **Rules** set for the colors of the bar graph are:

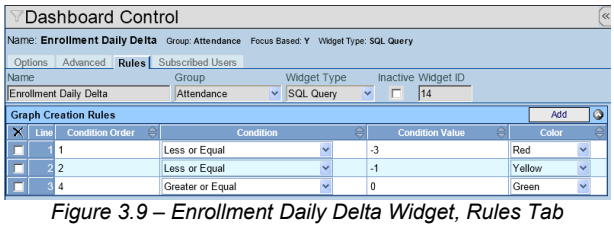


Figure 3.9 – Enrollment Daily Delta Widget, Rules Tab

ENROLLMENT DAILY DELTA – DISTRICT

This is a SQL Query that displays the change in the number of enrolled students from day to day for the district.

Figure 3.10 – Enrollment Daily Delta-District Widget

The **SQL Query** used in this widget is:

```
-- Enrollment by day

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

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int, DELTA int)
declare @curEnr int
declare @lastVal int
declare @delta int

set @curDt = @startDt
set @lastVal = 0

while @curDt <= @stopDt
begin
 set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
 inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)

where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))

set @delta = @curEnr - @lastVal
if (@lastVal = 0)
  set @delta = 0
set @lastVal = @curEnr

if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
 insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt), @delta);
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' + str (year(EDAY)), ' ', '') as 'DAY',
 ENRCNT, DELTA from @result
```

The **Rules** set for the colors of the bar graph are:

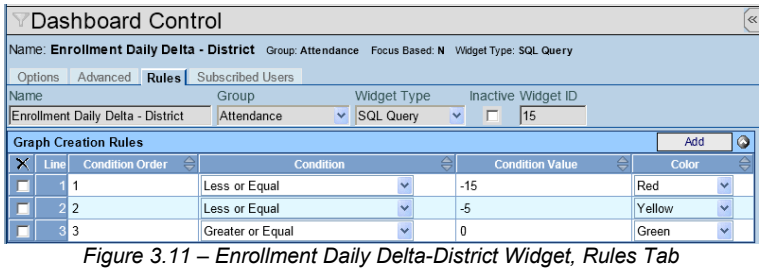


Figure 3.11 – Enrollment Daily Delta-District Widget, Rules Tab

NASA SPACE CENTER

This is an External Image widget that displays a still image of the Kennedy Space Center that is updated taken periodically during shuttle launches.

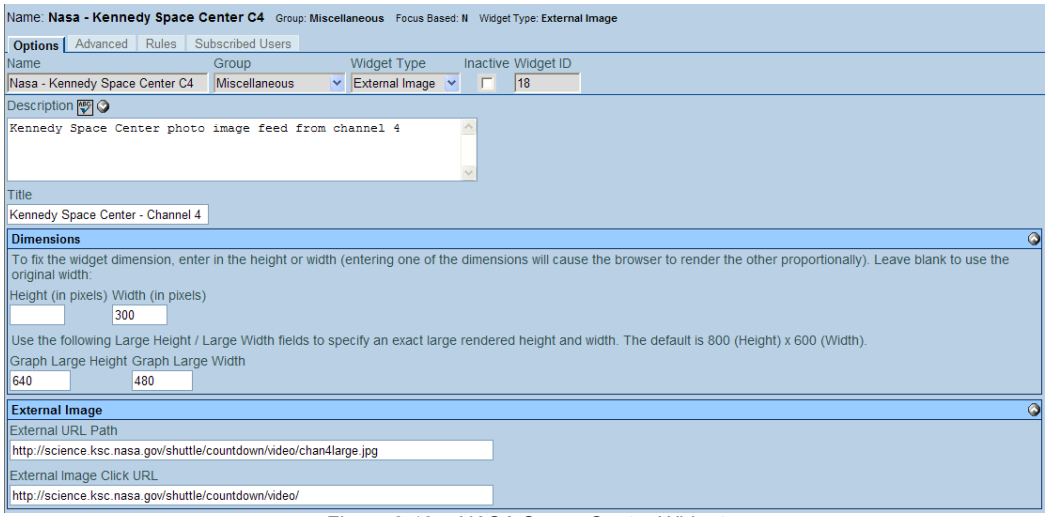


Figure 3.12 – NASA Space Center Widget

WEATHER IN THE PACIFIC NORTHWEST

This is an External Image widget that displays an image of the weather radar for the Pacific Northwest.

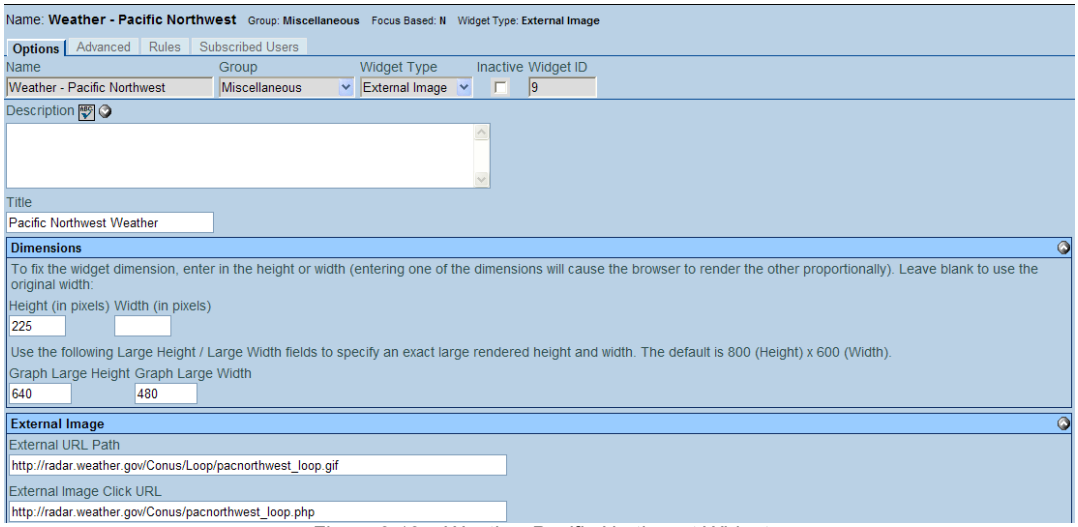


Figure 3.13 – Weather-Pacific Northwest Widget

Chapter Four: SECURITY

This chapter covers:

- Where security for dashboard-related screens is defined

Security for each of the screens discussed in this guide is defined by **Synergy SIS > System > Security > PAD Security** and **Synergy SIS > System > Security > Security Definition**. How each of these screens works is covered in detail in the *Synergy SIS – Security Administrator Guide*. This chapter outlines where the security for each part of the **Dashboard Control** screen is defined in the **Security Definition** screen.

DASHBOARD CONTROL SECURITY

The **Options** and **Advanced** tabs of the **Dashboard Control** screen are controlled by the security node:

Revelation.Query.DashboardWidget

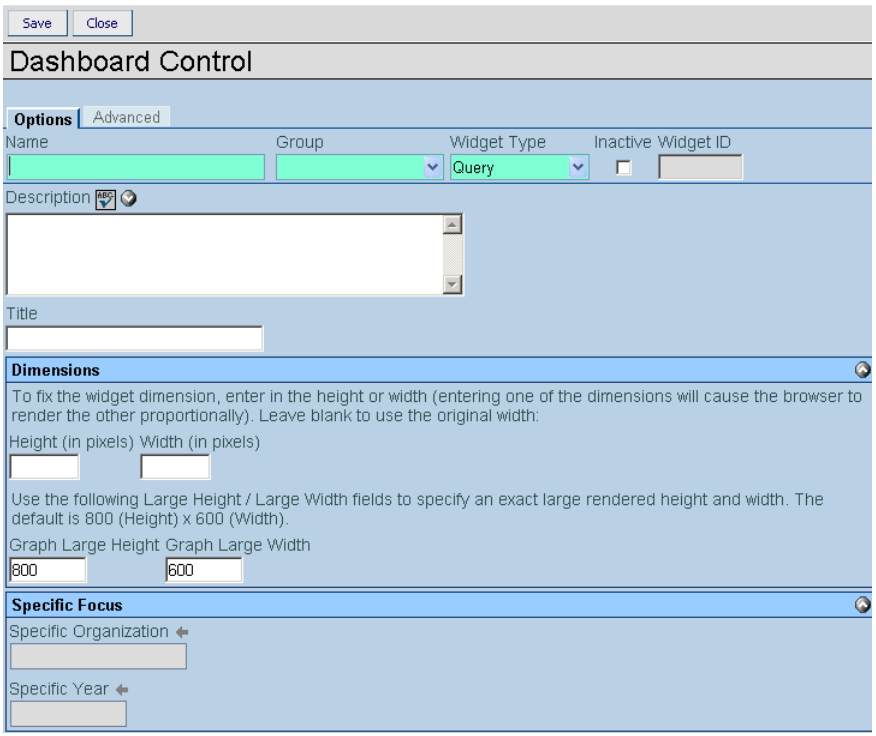


Figure 4.1 – Dashboard Control Screen

The **Rules** tab of the **Dashboard Control** screen is controlled by the security node:

Revelation.Query.DashboardWidgetRule

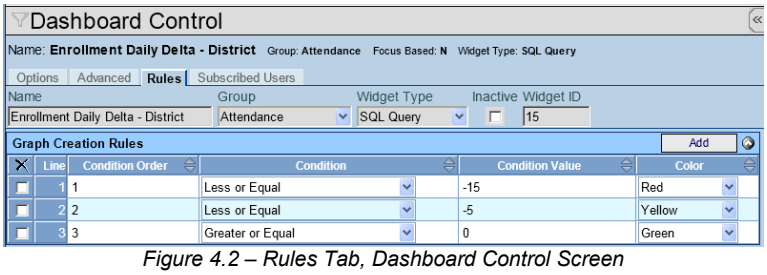


Figure 4.2 – Rules Tab, Dashboard Control Screen

The **Subscribed Users** tab of the **Dashboard Control** screen is not controlled by a security node.

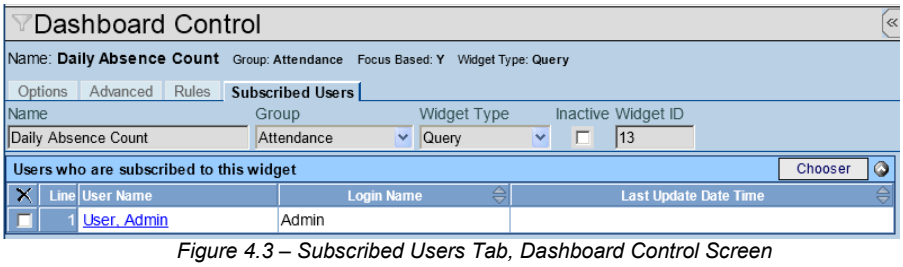


Figure 4.3 – Subscribed Users Tab, Dashboard Control Screen

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

- Revelation.Query.DashboardUI

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