



SynergyTM

Student Information System

Synergy SIS[©] **Student Information Administrator Guide**



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CONVENTIONS USED IN THIS MANUAL

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

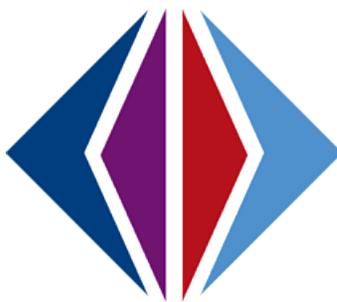


Caution – Warns of potential problems. Take special care when reading these sections.

BEFORE YOU BEGIN



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 (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.



Chapter One: **OVERVIEW**

In this chapter, the following topics are covered:

- ▶ Overview of the Student Screens
- ▶ Implementation Considerations
- ▶ Preparation Prior to Setup

OVERVIEW OF THE STUDENT SCREENS

This manual describes the setup and configuration of most of the Student screens contained in the Student folder. The Student folder is where student demographic and enrollment information is recorded.

Security options available for those Student screens described in this manual are outlined. The companion manual to the Administrator Guide, *Synergy SIS – Student Information User Guide*, illustrates how to enter and modify student information and print related reports.

NAVIGATE TO THE STUDENT FOLDER



Figure 1-1 Synergy SIS Navigation Tree

1. Open the Synergy SIS Navigation Tree by clicking on the **Tree**.
2. Expand the **Synergy SIS** folder by clicking on the name Synergy SIS or the blue triangle pointing next to the word. Once clicked, the triangle will turn green and point downward.
3. Under the Synergy SIS folder, click on the name **Student** or click on the blue triangle pointing right next to it.

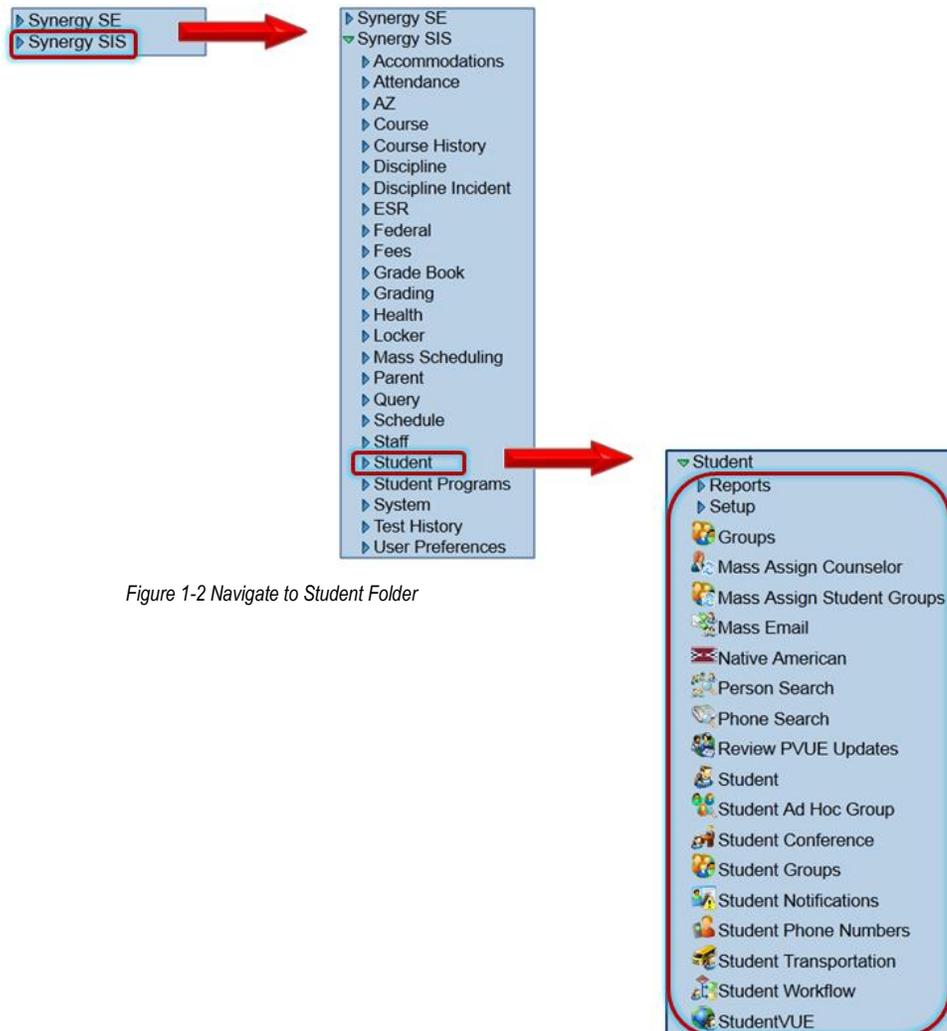


Figure 1-2 Navigate to Student Folder



Note: In the rest of the manual, the location of a screen or report in the Navigation tree will be indicated as follows: **Synergy SIS>Student**. This means go to the Navigation Tree, click on the Synergy SIS folder, and then click on the Student folder.

The Student screens described in this guide are:



Student Photo Attach (Student Setup Folder)



Mass Assign Counselor



Mass Email



Native American



Person Search



Phone Search



Student



Student Notifications



Student Phone Numbers



Student Transportation



Parent (Synergy SIS>Parent folder)

Where to find information on other Student Setup screens:



Conference Visitation Codes - *Synergy SIS Discipline & Conference User Guide*



District Groups - *Synergy SIS Student Groups Administrator Guide*



School Group Letters - *Synergy SIS Student Groups Administrator Guide*



School Groups - *Synergy SIS Student Groups Administrator Guide*

Where to find information on other Student screens:



Groups - *Synergy SIS Student Groups Administrator Guide*



Mass Assign Student Groups - *Synergy SIS Student Groups Administrator Guide*



Review PVUE Updates - *Synergy SIS ParentVUE & StudentVUE Administrator Guide*



Student Ad Hoc Group - *Synergy SIS Student Groups Administrator Guide*



Student Conference - *Synergy SIS Discipline & Conference User Guide*



Student Groups - *Synergy SIS Student Groups Administrator Guide*

 StudentVUE - Synergy SIS ParentVUE & StudentVUE Administrator Guide

 Student Workflow – Synergy SIS Student Workflow Guide (publishing date TBD)

STUDENT PHOTO ATTACH

Use Student Photo Attach to attach photo(s) to the student record in bulk or individually.



Figure 1-3 Student Photo Attach Screen

MASS ASSIGN COUNSELOR

The Mass Assign Counselor screen assigns a guidance counselor to all students who meet the criteria defined in the screen. Students are assigned a counselor based on a wide range of criteria such as grade level or home language. This screen may be used to switch counselors so that staff changes can easily be accommodated.

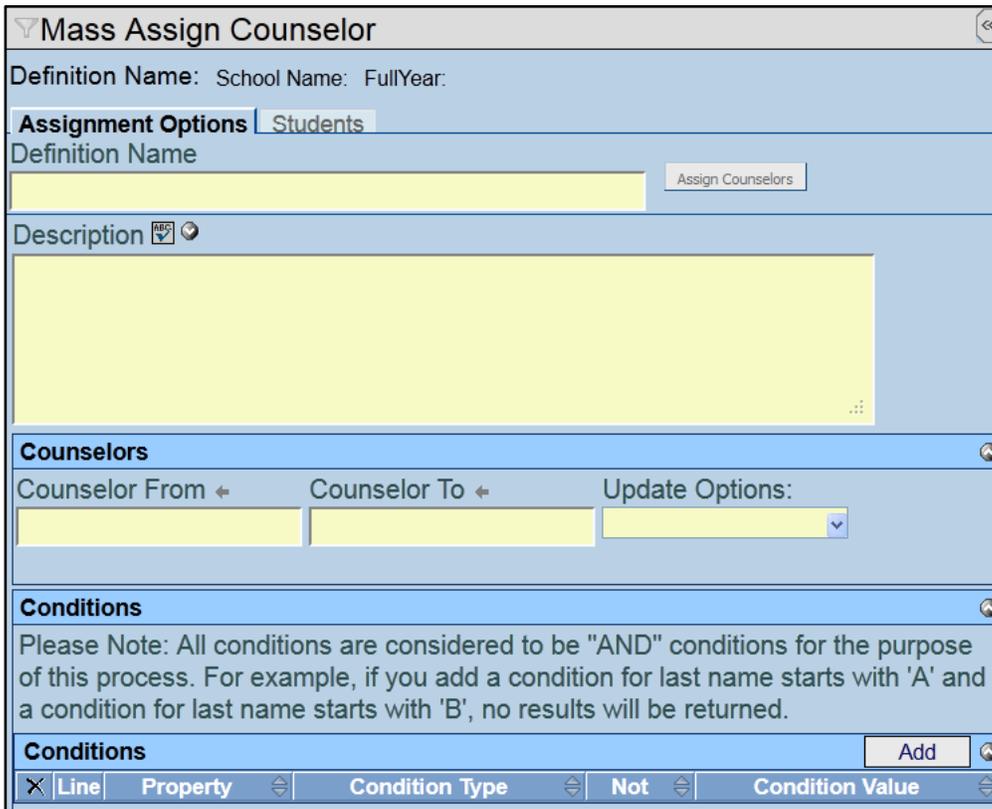


Figure 1-4 Mass Assign Counselor Screen

MASS EMAIL

The Mass Email screen will send e-mail messages to students and parents by grade level or by student group membership. Attachments can be sent with the messages.

The screenshot shows the 'Mass Email' interface with the following sections:

- Options**: Includes tabs for 'Options', 'Extra Filters', and 'Attachments'. A text block instructs the user to check 'Students', 'Parents', or both in 'Group to Email', select grade levels, and complete 'Email Options' fields before clicking 'Send Email'.
- Filters**: Contains a 'Group to Email' section with checkboxes for 'Students' and 'Parents'. To the right is a 'Grade' section with a grid of checkboxes for grade levels: PS, K, 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, and 12+.
- Email Options**: Features a dropdown for 'Email Content Type', a text field for 'Message Subject', and a large text area for 'Message Body' with a rich text editor icon.
- From Staff**: A dropdown menu for selecting the sender.
- Override From Email Address**: A text field for providing an alternative email address.

Figure 1-5 Mass Email Screen

NATIVE AMERICAN

The Native American screen captures a student's tribal affiliation.

Native American				
Student Name: School: Status: Homeroom:				
Native American Information				
Last Name	First Name	Middle Name	Suffix	Perm ID
Grade	Gender			
Identification				
CIB Tribal Community Degree	Tribal Code	Tribal Enrollment Number		
<input type="checkbox"/>				
Tribal Comment	Indian Education			
Funding	Supplies	Release Form		
<input type="checkbox"/> Title VII	<input type="checkbox"/> Fall	Submitted?	Release Form Date	
<input type="checkbox"/> Impact Aid	<input type="checkbox"/> Spring	<input type="checkbox"/>		
<input type="checkbox"/> Johnson-O'Malley				

Figure 1-6 Native American Screen

PERSON SEARCH

The Person Search screen searches for a student, staff or parent based on Name, Gender, SIS Number, State Student Number, or Birth Date. This can be helpful when incomplete information is available. The search results display detailed information about the person.

The screenshot shows the 'Person Search' interface. It includes a 'Search Criteria' section with input fields for Last Name, First Name, Middle Name, Gender (dropdown), SIS Number, and State Student Number. There is also a Birth Date field with a calendar icon and radio buttons for 'Student', 'Staff', and 'Parent'. A 'Number of Records To Find' field is set to 100. Below is a 'Search Results' table with the following columns: Line, Person Type, Name, SIS Number, Gender, Birth Date, Address, Organization Name, Attendance (Daily, Period), Student Programs, English Language Learners, Free and Reduced Meals, GATE, Student Course History, and Student Classes.

Figure 1-7 Person Search Screen

PHONE SEARCH

The Phone Search screen searches for students or parents based on a phone number or name. This can be very helpful when incomplete or cryptic voice mails are left.

The screenshot shows the 'Phone Search' interface. It includes a 'Search Criteria' section with input fields for Phone, Person Type (dropdown), and Phone Type (dropdown). There are also input fields for Last Name, First Name, Middle Name, and Gender (dropdown). Below is a 'Search Results' table with the following columns: Line, Type of Person, Name, Phone, Phone Type, and Note.

Figure 1-8 Phone Search Screen

STUDENT

The Student screen records all of the student’s demographic information. It lists the student’s parents, siblings, and emergency contact information. The student’s enrollment records for any school in the district are listed, as well as the student’s class schedule for the current year. Student documents such as a transcript or birth certificate can be attached. A log for any out of school contact can be kept.

Student

Student Name: School: Teacher: Room:

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

Last Name First Name Middle Name Suffix Perm ID Grade State ID

Student Information

No Photo Gender Home Language Spoken at Home

Nick Name Last Name Goes By AKA Last Name AKA First Name AKA Middle Name

AKA Suffix

Birth Date Birth State Birth Country

Birth Verification Birth Certificate Num Email

Race and Ethnicity

Hispanic/Latino Resolved Race/Ethnicity

Race

White Black or African American American Indian

Asian - Chinese Asian - Other Pacific Islander - Hawaiian

Pacific Islander - Other

Home Address | **Mail Address**

Address City State ZIP Code

+ 4

Grid Code

District of Residence by Address

County by Address

School of Residence Reason for Attendance Reason for Attendance Date

Phone Numbers

No Phone

Line	Primary	Type	Phone	Extension	Contact	Not Listed
Add						

ELL Languages

Language First Learn Home Language Spoken at Home Spoken by Student at Home Spoken by Adults at Home

Figure 1-9 Student Screen

STUDENT NOTIFICATIONS

The Student Notifications screen can record any critical student alerts such as a health condition. These notifications are displayed on every screen in Synergy SIS to alert staff to the situation.

Student Notifications					
Student Name: School: Homeroom: Teacher:					
Notifications					
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade
Student Notifications				Add	Show Detail
Line	Begin Date	Notification	End Date		

Figure 1-10 Student Notifications Screen

STUDENT PHONE NUMBERS

The Student Phone Numbers screen lists all phone numbers associated with the student, their parents, emergency contacts, and doctor or dentist.

Student Phone Numbers					
Student Name: School: Status: Room Name:					
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade
Numbers				Add	
Line	Relationship	Name	Phone Number	Phone Type	Comment

Figure 1-11 Student Phone Numbers Screen

STUDENT TRANSPORTATION

The Student Transportation screen lists the student's bus schedule and any special accommodations needed.

The screenshot displays the 'Student Transportation' form with the following sections:

- Student Information:** Fields for Student Name (Last, First, Middle, Suffix), Perm ID, Grade, and Gender.
- Student Address Information:** Fields for Address, City, State, ZIP Code + 4, and Grid Code, with a 'Map It!' button.
- School Information:** Fields for School and Staff Name.
- Transportation:** Fields for Transport Code, Transportation Request Date, and Transportation Start Date.
- Pick Up Information:** Fields for Transportation Type (Bus Route), Bus Stop, Pick Up Time, Pick Up Location Type, Pick Up School, Address, City, State, Zip Code, Comment, Transportation Reason Code, Transportation Reason Date, Responsible Person, and Phone.
- Drop Off Information:** Fields for Transportation Type (Bus Route), Bus Stop, Drop Off Time, Drop Off Location Type, Drop Off School, Address, City, State, Zip Code, Comment, Transportation Reason Code, Transportation Reason Date, Responsible Person, and Phone.
- Special Transportation Requirements:** Includes a table for 'Transportation Requirements' with columns for Line, Special Transportation Requirements, and Note. Below are checkboxes for 'Leave Unattended (at Pick Up and Drop Off)' and 'Wheelchair', a 'Special Requirements Comment' field, and a 'Transportation Logistics Information' section with fields for Special Program Teacher, Primary Phone, School Start Time, School Dismiss Time, Next School of Attendance, and Form Completed By.
- Additional Addresses:** A table with columns for Line, Type, Location Type, School, Address, City, State, Zip Code, Transport Time, and Transportation Days (Sun-Sat).

Figure 1-12 Student Transportation Screen

PARENT

The Parent screen records the demographic information for each parent or guardian. It lists all the children for that parent in any school in the district. The ParentVUE tab manages parent settings and information for the ParentVUE portal. The Parent Contact log records the contact between school and parent.

The screenshot shows the 'Parent' screen with the following sections and fields:

- Parent Name:** Last Name, First Name, Middle Name, Suffix, Title
- Demographics:** Children, ParentVUE, Parent Contact (tabs)
- Parent Info:** Adult ID, Gender, Primary Language, Social Security Number, Email, Nick Name, Last Name Goes By, AKA Last Name, AKA First Name, AKA Middle Name, AKA Suffix, Employer, Job Title, US Citizen, Deceased, Uniformed Military, Highest Education Level, Birth Date, Birth Place, Additional Info
- Race and Ethnicity:** Hispanic/Latino, Resolved Race/Ethnicity, Race (checkboxes for White, Black or African American, American Indian, Asian - Chinese, Asian - Other, Pacific Islander - Hawaiian, Pacific Islander - Other)
- Home Address:** Address, City, State, Zip Code + 4, Map It!, Mail Same As Home Address
- Mail Address:** Address, City, State, Zip Code + 4, Map It!
- Work Address:** Address, City, State, Zip Code + 4, Map It!
- Phone Numbers:** Add, Line, Primary, Type, Phone, Extension, Contact, Not Listed
- Address History:** (bottom section)

Figure 1-13 Parent Screen

IMPLEMENTATION CONSIDERATIONS

A considerable factor that determines the configuration of the student screens are the rules at the state level. Data that is collected by the state determines most of the enrollment configuration and setup needed. The Student screens need to be setup in conjunction with the setup outlined in the *Synergy SIS – State Data Reporting Administrator Guide*. The state rules will guide the setup of most of the enrollment and other student options section.

A decision that needs to be made prior to configuration is how to determine which school the student attends. Synergy SIS can use the student's address to determine which elementary, junior, or senior high school is designated for that address. In large districts, this validation process can be extremely helpful. However, smaller districts may prefer to assign schools manually. This will determine how the address options are configured.

If teachers and other staff will be allowed to send email to students and parents, the email options must be configured as outlined in the *Synergy SIS – System Administrator Guide*.

Photos can be added to the student record to aid new teachers and substitutes in managing their classrooms. If the district decides to add the student photos in Synergy SIS, photos can either be added manually or imported in bulk.

BEFORE STARTING

Throughout the Student screens, there are several drop-down lists with pre-selected values. These values are stored in a Lookup table, with a separate table for each list. Some Lookup tables are *Product Owned*, which means the values in these tables have been hard-coded into the Synergy SIS programming, and cannot be changed. The other tables may be modified to match the needs of the district. The Lookup tables that can be modified by the school district are listed below. The values used by these tables need to be gathered before setting up the Student screens as outlined in this guide.

Lookup Table Name	Description
Birth Verification	a list of the documents or methods used to verify the student's birth location
Reason For Attendance	the reasons the student is attending a school other than the school designated by their address
Phone Type	the type of phone number entered, such as home or cell
Relation	the relationship between the student and the person listed, such as mother.
IVEP	either the reason for the student's IVEP participation or the program offered to the student
Allow Medication	the medication school personnel are allowed to give the student, or it can be setup as a Yes/No selection
Custody	a list of possible custody issues
Family Code	the type of family situations such as 1 adult household
Dwelling Type	the type of living situation for the student
ELL Code	the student's ELL classification
Enrollment Restriction	if the student is restricted from enrolling in certain schools or the district in general, the reasons for the enrollment restriction
Deny Photo/Interview	a list of the specific conditions for photos or interviews with the students
Internet Authorization	the list of conditions the parent has specified for the student's Internet access
Graduation Status	a list of the possible graduation conditions
Post Secondary	a list of possible student plans for after high school
Transport Code	a list of the codes indicating student eligibility for district transportation

Transportation Type	a list of the types of transportation available, such as bus or train
Transport Location Type	a list of the possible types of locations where students can be picked up or dropped off when transporting them to school
Special Transportation Requirements	for students with special transportation needs, a list of the possible accommodations needed
Instructional Setting	a list of the possible special programs outside a traditional classroom structure
Program Code	the student's special education classification
Special Program Code	a list of any other special programs available to students
Access 504	the student's special education or 504 classification
Doc Category	a list of the type of documents that can be attached to the student records, such as a birth certificate or withdrawal form
Contact Type	a list of the methods used to contact the parent and/or student
Outcome	a list of the types of outcomes that can occur following parent and/or student contact.
Tribal Community	a list of the tribes in the district's region

Many other Lookup tables outside of the ones explained in this guide are used by the Student screens. However, these Lookup table values are set by the state and are explained in the *Synergy SIS – State Data Reporting Administrator Guide*. These state Lookup tables should be configured prior to using the Student screens, also.

As can be seen from the list of Lookup tables above, Synergy SIS offers ample fields to capture information about a student. However, there may be additional information that a district wants to capture not defined in one of the existing fields. To enable districts to capture this information in Synergy SIS, there are additional fields that can be district customized. If any district-defined codes will be setup, gather the list of additional information needed.

Chapter Two: **ENROLLMENT & OTHER STUDENT OPTIONS**

In this chapter, the following topics are covered:

- ▶ Enrollment Customization
- ▶ Enrollment Maintenance
- ▶ Student Data Merge
- ▶ Notifications
- ▶ Student Profile Report
- ▶ Lookup Tables for the Student Screen
- ▶ District Defined Codes

ENROLLMENT CUSTOMIZATION

DISTRICT LEVEL ENROLLMENT OPTIONS

Most of the many options to control the student enrollment process are configured at the district level. To define the enrollment process:

1. Navigate to **Synergy SIS>System>Setup>District Setup**.

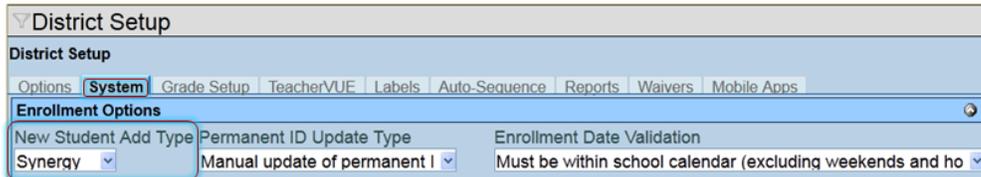


Figure 2-1 District Setup Screen System Tab

2. Click on the **System** tab.

Enrollment Options

- **New Student Add Type**

For those districts where Synergy SIS is synchronized to SASIxp or SASI III during a conversion, students may be added in either Synergy SIS or SASIxp/SASI III.

If students should be added in Synergy SIS, or if the conversion has been completed and Synergy SIS is no longer synchronizing to SASIxp/SASI III, the New Student Add Type should be set to **Synergy**.

If Synergy SIS still synchronizes to SASIxp or SASI III and the students are added in SASIxp or SASI III instead of Synergy SIS, set the New Student Add Type to **SASIxp** or **SASI III**.

- **Permanent ID Update Type**

Synergy SIS can automatically assign the Permanent ID for the student when a student is added to Synergy SIS. Permanent IDs are created sequentially, based on the last number assigned. The number that Synergy SIS has stored as the last number assigned is shown on the Auto-Sequence tab of the District Setup, under the K12.Student.SISNumber value.

18	K12.Student.SisNumber	997017
19	K12.TestInfo.Setup.Test.TestScanSheetNumber	10062
20	Revelation.Query.DashboardWidget	3
21	SCHINCDISP_2009	1

Figure 2-2 District Setup Screen Auto-Sequence Tab

1. When converting from another SIS, the number should be manually adjusted to a number higher than the last number assigned in the old SIS system.
2. To have Synergy SIS auto-generate the Permanent ID, set the **Permanent ID Update Type** to Synergy SIS update of Permanent ID.

OR

If the Permanent ID are not sequential and based on an outside system of numbering such as the student's social security number or state ID, the numbers must be manually entered and the **Permanent ID Update Type** should be set to Manual update of Permanent ID.

OR

In other cases, it may be necessary to edit the number selected by Synergy SIS. To allow a user to edit the number assigned by Synergy SIS, select Manual Override of Permanent ID as the Permanent ID Update Type.

In all cases, remember this number must be unique. This number can be automatically calculated using the Generic Conversion program, as outlined in the *Synergy SIS – Data Conversion Guide*.

- **Allow “No Show”**

If checked, students can be marked as a “No Show” instead of Inactive. When a student is marked as “No Show”, the enrollment record for that year being is deleted and the student is no longer displayed in that school year. When a student is marked Inactive, the enrollment record remains, but a withdrawal date is entered into the enrollment record. The student still displays in the list of students for that school year, but their name displays in parenthesis to indicate that they are no longer “active”, meaning that they are no longer attending the school.

- **Require Summer Withdrawal Code/Date For “No Show”**

Check this box to require a summer withdrawal code and date. This code and date are required in some states when a student is marked as “No Show”. This code and date will be required throughout the year, if checked.

- **Do Not Clear Summer Withdrawal Code and Date**

If checked, the summer withdrawal code and date cannot be removed from the record.

- **Show SASIxp Enrollment History**

If checked, the enrollment records originally converted from SASIxp are displayed below the enrollment records in Synergy SIS. This can be helpful during the data conversion process from SASIxp to Synergy SIS to verify that the enrollment records were transferred correctly.

- **Validate SASIxp Enrollment History**

If checked, the enrollment records originally converted from SASIxp are validated.

- **Show Emergency Contact as Lookup**

The people listed as the emergency contact(s) are frequently not the student’s parents. To reduce the data entry needed, the names of the emergency contacts may be typed into the Emergency tab of the Student screen instead of being selected from the names listed in the Parent screen. If this is checked, the emergency contact must be added to the Parent screen to be selected as an emergency contact. This can be helpful if the same person is an emergency contact for multiple students.

- **Show User Code As Lookup**

If checked, the user code fields display as a drop-down selection instead of a free-form text box. This can be helpful if the user code only refers to a defined set of values. Setting the code as a Lookup will prevent data entry errors such as misspelled codes that tend to occur when data is entered in a free-form text box. The Lookup values must then be defined in the Lookup Table Definition screen for that user code. For more about user codes, see [District-Defined Codes](#).

- **Show User Num As Lookup**

If checked, the user num fields display as a drop-down selection instead of a free-form text box. This can be helpful if the user num only refers to a defined set of values. Setting the num field as a Lookup will prevent data entry errors such as misspelled codes that

tend to occur when data is entered in a free-form text box. The Lookup values must then be defined in the Lookup Table Definition screen for that user num. For more about user codes, see [District-Defined Codes](#).

- **Show Advanced Options on Inactivate Student**

If checked, the Advanced Options displays when a student is inactivated. The Advanced Options add a checkbox that can be used to drop the student's classes automatically when a student is inactivated.



Figure 2-3 Inactivate Student Screen

- **Delete Course Requests on No Show and Inactivate**

If a student has been enrolled in the new school year and has active course requests, and then is marked as “No Show”, or withdrawn in the current school year, their course requests in the new school year will be deleted if this option is selected.

- **Delete New Year Enrollment on No Show of Student in Current Year**

If a student has been enrolled in the new school year, and then is marked as “No Show” in the current school year, their enrollment in the new school year will be deleted if this option is selected.

- **Keep Concurrent Enrollment on Inactivate Student**

If checked, a concurrently-enrolled student (a student enrolled in two or more schools in the district at the same time) is only withdrawn from the school in focus when they are inactivated. If the box is not checked, the student is withdrawn from all schools in the district in which they are enrolled when they are inactivated.

- **Require Withdrawal Reason Code**

If checked, a withdrawal reason code must be selected when a student is inactivated. This is required in many states for schools in improvement status.

- **Show Withdrawal Reason Code**

If checked, the ability to select which withdrawal leave codes also require an exit withdrawal reason, is enabled.

Additional Rules Setup is required for this functionality.

1. Navigate to **Synergy SIS>System>Setup>Rules Setup**. The Rules Setup screen displays.
2. Click **Add**. The Rules Setup Add screen displays.
3. Enter the following information into the appropriate fields:

Field Name	Data
Rule Name	Withdrawal Reason Rule
Category	Enrollment
Enable Rule	Selected
Run Type	Real Time
Error or Notification Caused When	Any Rule is False

4. Click **Save**.
5. On the Rules Setup screen, click **Add** on the Rules grid.
6. Enter the **Description** as dictated by your school or district.
7. Select **Withdrawal Reason Rule** in **Type**.
8. Click **Show Detail**, and make the appropriate selections.
9. Click **Save**.

Examples of possible selections available in the detailed screen follow.



Figure 2-4 Rules Setup Detailed Screen

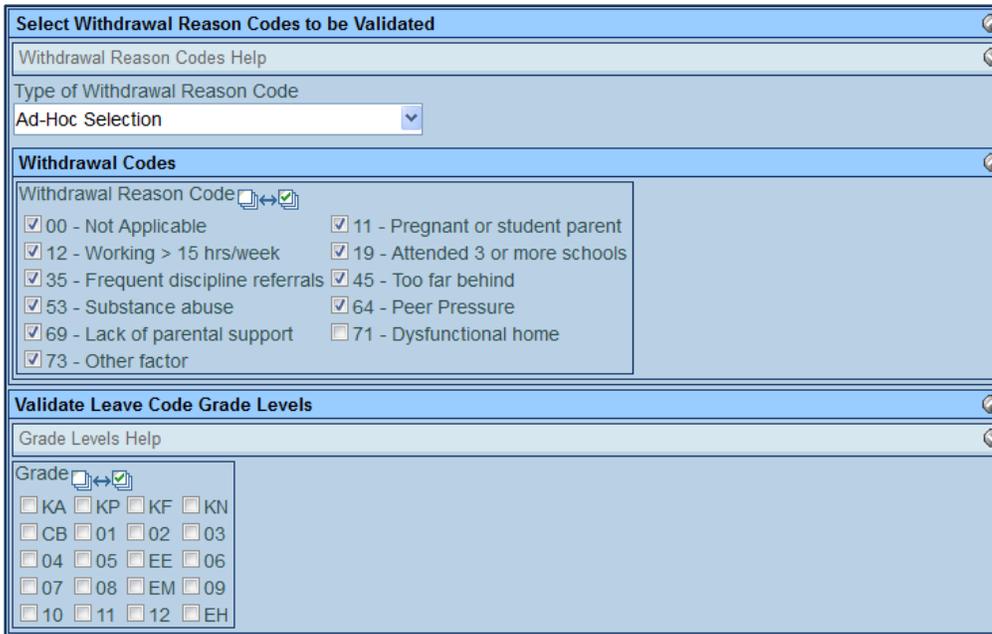


Figure 2-5 Rules Setup Detailed Screen

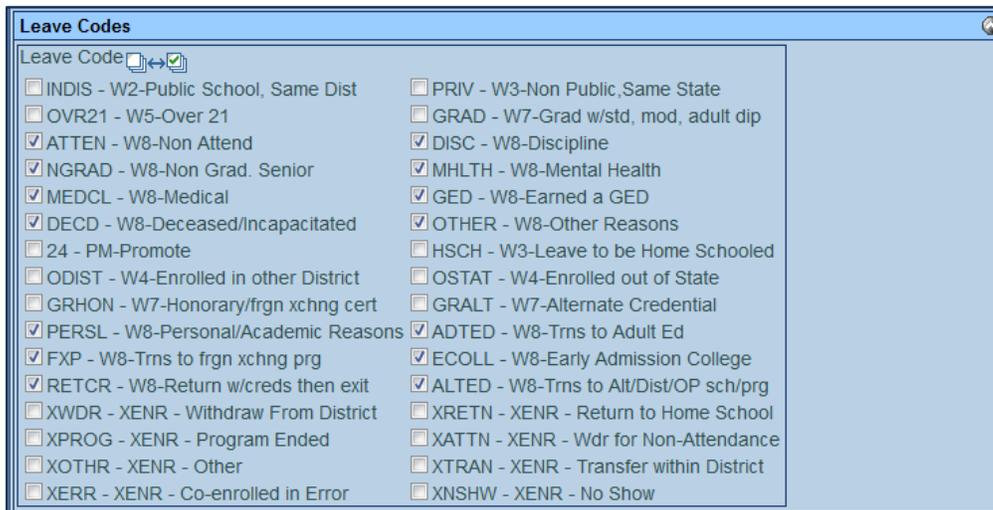


Figure 2-6 Rules Setup Detailed Screen

- **Show Withdrawal Reason Text Message on Elementary School Types**

If checked, the withdrawal reason text message displays on elementary school types.

- **Withdrawal Reason Text**

Custom instructions can be entered into this box to explain the withdrawal reasons further. This text is displayed when a student is inactivated below the Withdrawal Reason Code drop-down box. The text in this box may be checked for spelling by clicking the Spell Check .

Inactivate Student

You are about to inactivate 'Abernethy, Anne E.'. Fill in the leave date, enter the leave code and press the Inactivate button to complete the Inactivation or Cancel to abort.

Leave Date Leave Code

Withdrawal Reason Code

The Withdrawal Reason Text can further explain what each reason signifies.

Advanced Options

Drop Classes On Inactivation
Course requests will be removed and not added back based on the student's schedule

Next Year Enrollment Action Summer Withdrawal Code Summer Withdrawal Date

The student has enrollment information in the new year. Please specify how you would like to address the enrollment in the new year.

Figure 2-7 Inactivate Student Screen

- **Allow Simple Delete of Enrollment**

When selected, the menu item "Delete Student Enrollment" displays on the Student screen. It is important that before a user deletes a student enrollment they check for concurrent enrollment. This must be deleted first. The following messages display when the button is clicked.

2406 - You are about to delete the current enrollment for (student) from (school). If you are sure you want to delete them, type the word 'YES' in the space provided below, and then click the Continue button. Otherwise, click Cancel to cancel this action (this is shown on the Confirm Delete Student Enrollment dialog).

2407 - Cannot delete enrollment from this school because student is concurrently enrolled at another school.

2408 - Cannot delete enrollment from this school and year because this is not the student's School of Record enrollment.

- **Disable New Year Activation**

If checked, the New Year Rollover process definitions are inactivated. For more information, please see the *Synergy SIS – New Year Rollover Process Guide*.

- **Show Residence Properties on Student Screen**

If checked, the School of Residence, Reason for Attendance, and Reason for Attendance Date fields will display on the Demographics tab of the Student screen. If a school uses the Address Grid Definition to define the schools a student should attend based on the student's address, the school of residence is the assigned school based on the student's address. If the student is attending a school other than their school of residence, many states require that the reason for their attendance be recorded and the date the school received the reason for the waiver from the residency requirements. For more information about the Address Grid Definition, see [Address Options](#).

- **New Year Def used when adding new students**

This selection is used during the transition period when students have been enrolled in the next school year but student enrollment changes are still taking place in the current school year. For more information, please see the *Synergy SIS – New Year Rollover Process Guide*.

- **Enrollment Date Validation**

When a student is added to Synergy SIS, the date entered in the Enter Date can be checked against the school calendar to ensure the school is in session on that date.

1. To validate the enter date, select the option **Must be within school calendar (excluding weekends and holidays as valid days)** or **Must be within school calendar (including weekends and holidays as valid days)** depending on whether or not the district and/or state allows students to enroll on weekends and holidays.
2. To turn off the validation, select **None (SASI XP)**. This option is generally only used when the district is adding students in SASI XP or SASI III and these systems are synchronizing with Synergy SIS. If validation has been turned off, the enter dates are still checked by any reports and processes such as the state upload process to ensure the dates are valid, and any errors are reported. By validating the date at the time of entry, this eliminates data entry corrections later on.



Caution: If the Enrollment Date Validation is set to **None**, and it is then changed to one of the **Must be within school calendar** options, Synergy SIS does not go back through the student records already added and flag the incorrect enter dates. These dates must still be corrected manually. Only new or updated student enter dates will be checked.

- **Use Grid For Transportation Requirements**

The address grid definitions are used to determine if the student is eligible for school-provided transportation.

- **Force One Race To Be Selected Even If Hispanic**

When this is checked, a race other than Hispanic must be selected (in addition to Hispanic, if needed).

- **Show District Of Residence as Lookup**

Select Show District of Residence As Lookup to display the County Type District (CTD) number for the district as a drop-down list instead of a text box. This only affects new enrollments or transfers. If selected, the lookup table K12.Setup.District Number needs to be populated with the CTD number(s) used by the district.

- **Show County as Lookup**

Check this selection to attach the county code to the student address. The County by Address dropdown on the Student screen Demographics tab displays. The Lookup table for this option is **K12.Setup.County**.

- **Require Find before Adding New Parents**

The District can require that users perform a search to see if a parent already exists in the system before adding a new parent record. Checking this box disables the Add New Parent button until a Find is performed for a parent, similar to how a Find is required before adding a new student.

- **Require Enrolling Parent Validations**

If checked, the following rules regarding designating an Enrolling Parent when a new student is added, or when a change is made to the Enrolling Parent, Has Custody, Lives With, or Contact Allowed settings for an existing student, will be implemented:

- a. The person who is designated as the Enrolling Parent must be the student's mother, father, legal guardian, foster parent, or self.

- b. One, and only one, person on a student’s list of parents and/or legal guardians may be designated as the Enrolling Parent.
- c. The Enrolling Parent must also be designated as Has Custody, Lives With, Contact Allowed, Records Access Rights, and Release To within Synergy SIS.

Lookup values must be defined in the Lookup Table Definition screen to enable this functionality.

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status	
								Year Start	Year End
10		F	Father			ENR			
20		M	Mother			ENR			
30		FF	Foster Father			ENR			
40		FM	Foster Mother			ENR			
50		G	Guardian			ENR			
60		S	Self			ENR			

Figure 2-8 Lookup Table Definition Screen

1. Navigate to **Synergy SIS >System >Setup >Lookup Table Definition**. The **Lookup Table Definition** screen displays.
2. On the **Lookup Table Definition** screen, navigate to **K12>Relation Type**. The **Relation Type** lookup table displays.
3. Enter 'ENR' in the **Alt Code 3** column for **Mother, Father, Legal Guardian, Self, and Foster Parent** values.

The rest of the options in the Enrollment Options section (default exit codes, etc.) control how a student’s inactivation affects their enrollment in student programs. For more information about these options, see the *Synergy SIS – State Data Reporting Administrator Guide*.

Below the Enrollment Options, the district can turn off any enrollment-related changes in the Disable Add, Drop, and Transfer section.

1. The changes may be restricted during specific time periods on specific days by entering the **Begin** time and **End** time on each day during which enrollment changes are not allowed.
2. Alternatively, to disable completely all enrollment changes, check **Disable Ability to Add, Drop, and Transfer Students**. This overrides the times specified and completely disables enrollment changes.

Disable Add, Drop, and Transfer

Disable ability to add, drop, and transfer students.(overrides grid below)

Enter a begin and end time during which users will not be able to add, drop, or transfer students

Disable Add, Drop, and Transfer

Line	Day of Week	Disabled Time Period	
		Begin	End
1	Sunday		
2	Monday		
3	Tuesday		
4	Wednesday		
5	Thursday		
6	Friday		
7	Saturday		

Figure 2-9 District Setup Screen System Tab Disable Add, Drop and Transfer Section

Other Options

1. Scroll to the bottom of the screen in the **Other Options** section.

Other Options

Discipline Type: Incident

Incident Violation Display: Entire Violation

District Group History Filter: All Groups for the Current Year for the C

Student Notification: Icon

Badge Number Update Type:

Disable Unique State Number

Adult ID Update Type:

Allow Negative Seat Totals

Enable Announcement Dismissal

Fee Total Type: Include fees for all organizations

Enable historical tracking of staff in sections

Auto Assign District Staff To Schools

Validate Student Classes

Show Warning and Allow Data to be Saved if Student Clas

Student Profile Report Release Statement

Class Attendance Signature Text

Course ID Print Width

Use Course Short Title

When Use Course Short Title option is selected the Short Course Title will be used when adding new Course History records or when running the Update Student Course History process. If Short Course Title is blank, then the full Course Title will be used instead

Parent Filtering

Enable Parent Filtering

Disable Parent Filtering

Enable Parent Filtering

Enable Parent Filtering - Include Unassigned Parents

Use Group State Reporting

Display Student Test ID

Figure 2-10 District Setup Screen System Tab Other Options Section

2. Check **Disable Unique State Number** to allow duplicate state numbers (not Permanent ID) to be created. This is helpful during the conversion from another student information system, where the state numbers may not have been unique. Once the numbers have been cleaned up, the box may be unchecked to enforce the entry of unique numbers.
3. An Adult ID, frequently used in audits, can be automatically assigned to parents in Synergy SIS. To determine how an Adult ID is assigned to parents, select the **Adult ID Update Type** from the drop-down controls. They can either be automatically generated or manually assigned.
4. When adding a parent/guardian to a student record, Synergy SIS can select a parent record that already exists in the system. This is useful for families with multiple children at the district. Select Parent Filtering options from the drop-down.
 - **Disable Parent Filtering** will display all parents in the district.
 - **Enable Parent Filtering** will display parents at the school in focus, only.
 - **Enable Parent Filtering – Include Unassigned Parents** will display all parents at only the school in focus.

It is strongly recommended that filtering be disabled.

5. Click **Save** or click the **Undo** to cancel the changes.



Reference: For more information about custom validation rules for enrollments, please see the *Synergy SIS – System Administrator Guide*.

SCHOOL LEVEL ENROLLMENT OPTIONS

There are options to control the student enrollment process that may be configured at the school level.

- **Concurrent Enrollment Type**

Concurrent enrollments occur when a student is enrolled in two or more schools at the district at the same time.

1. Navigate to **Synergy SIS>System>Setup>School Setup**.
2. Click Concurrent Enrollment Type .

Select **Do not allow concurrent enrollments** if concurrent enrollments are not allowed at all in the school in focus.

OR

Select **Full Concurrent - Able to send and receive concurrent students**. In this option, students enrolled in another school in the district can enroll in the school in focus and students already enrolled in the school in focus can enroll in other schools.

OR

Select **Entry Concurrent – Able to receive concurrent students only**. In this option, students enrolled in another school in the district can enroll in the school in focus but students already enrolled in the school in focus cannot enroll in other schools.

OR

Select **Exit Concurrent - Able to send concurrent students only**. In this option, students enrolled in another school in the district cannot enroll in the school in focus but students already enrolled in the school in focus can enroll in other schools.

If this is left blank, the default action is set to **Do not allow concurrent enrollments**.

The screenshot shows the 'School Setup' interface for 'Hope High School' in the '2012-2013' school year. The 'Type Information' section is active, and the 'Concurrent Enrollment Type' dropdown is open, showing four options: 'Do not allow concurrent enrollments', 'Full Concurrent - Able to send and receive concurrent students', 'Entry Concurrent - Able to receive concurrent students only', and 'Exit Concurrent - Able to send concurrent students only'. The 'Exit Concurrent' option is selected and highlighted in yellow. Other sections visible include 'Period Definition', 'Grade Selection', 'Grading Options', and 'Roll Over Defaults'.

Figure 2-11 School Setup Screen

- **Roll Over Defaults**

After the New Year Rollover has been completed, students who previously attended another school in the district but now enroll in this school, are enrolled in this school with the **Enter Code** and **Enter Date** entered in the Roll Over Defaults section.

These values may be manually edited when the data is entered. If they are left blank, no values are entered and the fields will need to be manually entered when the student is enrolled.

1. Click **Save** or click **Undo** to cancel the changes.
2. These options need to be set at each school in the district. Change the focus to a different school and set the options again. Do this for each school, or use the School Setup Copy function described in the *Synergy SIS – System Administrator Guide*.

ENROLLMENT MAINTENANCE

In rare instances, it may be necessary to edit the enrollment information for a student outside the Student screen. Editing the enrollment information outside the Student screen bypasses the validation built-in to the Student screen, which allows the enrollment to be switched to another school or year. However, editing the enrollment in this manner can cause severe problems, and must be approached with care.

The primary reason to use the Enrollment Maintenance screen is when a student is erroneously enrolled in the wrong school or wrong year. The student can be “no showed”, but a data record still remains for that student. To remove the inaccurate record of enrollment completely:

1. On the Student screen, click on the Enrollment History tab.
2. Click Menu.
3. Select **No Show**.

OR

Delete the enrollment record. It is preferable to No Show the student, but if the data entry clerk panicked and inactivated the student already, the enrollment records need to be deleted.

Line	School Year	Enter Date	Enter Code	Leave Date	Leave Code	Grade	School	ADA/ADM	Track	Summer Withdrawal Code	Summer Withdrawal Date
1	2007-2008	08/06/2007	E6			07	Eisenhower Middle School				
2	2008-2009	08/11/2008	E1			08	Eisenhower Middle School				
3	2009-2010	08/10/2009	E2			09	Hope High School				
4	2010-2011	08/09/2010	E1			10	Hope High School				
5	2011-2012	08/15/2011	E1			11	Hope High School				
6	2012-2013	08/28/2012	E1			12	Hope High School				
7	2013-2014	07/29/2013	E1			12	Hope High School				

Figure 2-12 Student Screen Enrollment History Tab

4. To delete the enrollment records, click on the **blue underlined date** on the Enrollment History record. The Enrollment History screen opens.
5. Click **Show Detail**. A detailed screen opens on right.
6. Check on the line of the Enrollment Activity to delete. Delete any other Enrollment Activity associated with the School Enrollment date that will be deleted.
7. Click **Save**.

Line	Enter Date	Enter Code	ADA/ADM	Track
1	07/29/2013	E1-First Arizon		

Line	Effective Date	Grade	Previous Grade Exit Code	FTE	Inst Setting	Access 504	DOR	HB	Prog	SEC	SPC	TPC	Came From
<input checked="" type="checkbox"/>	07/29/2013	12		1.00	1		123456000		10			1	

Figure 2-13 Enrollment History Screen Detailed View

8. Scroll far right and click **Hide Detail** to return to the main enrollment record.
9. Check on the line of the School Enrollment record to delete.
10. Click **Save**.



Figure 2-14 Enrollment History Screen Delete School Enrollment Record

Close the **Enrollment History** screen. Note that the record still shows in the Enrollment History grid even though the enrollment records have been deleted.

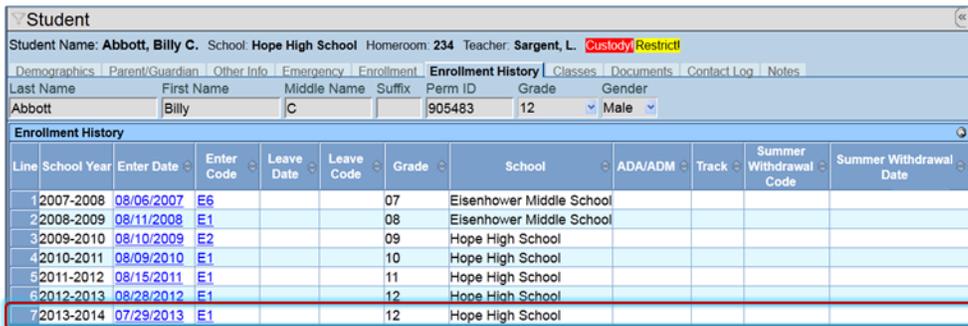


Figure 2-15 Student Screen Enrollment History Tab

1. Once the student's enrollment records have been deleted or the student has been no showed, go to the **Enrollment Maintenance** screen, found under Synergy SIS>System>Data Maintenance.

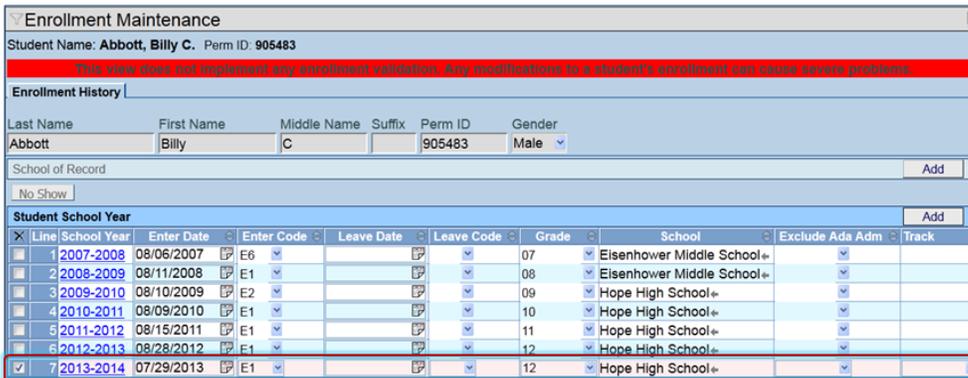


Figure 2-16 Enrollment Maintenance Screen

2. Check on the line of the School Year record to delete.
3. Click **Save**. The enrollment record no longer opens on the Enrollment History tab of the Student screen.

STUDENT DATA MERGE

Occasionally, a student may be entered into Synergy SIS twice by mistake. When the student's records are duplicated, the records should be merged into one record. To merge duplicate records:

1. Navigate to **Synergy SIS>System>Data Maintenance>Student Data Merge**.

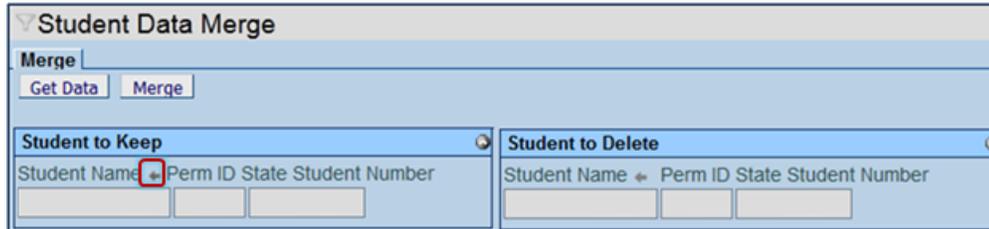


Figure 2-17 Student Data Merge Screen

2. To select the student record to keep (this should be the record with the most information or oldest enrollment records.) in the **Student to Keep** section, click the ← next to the Student Name. The Find: Student screen opens.

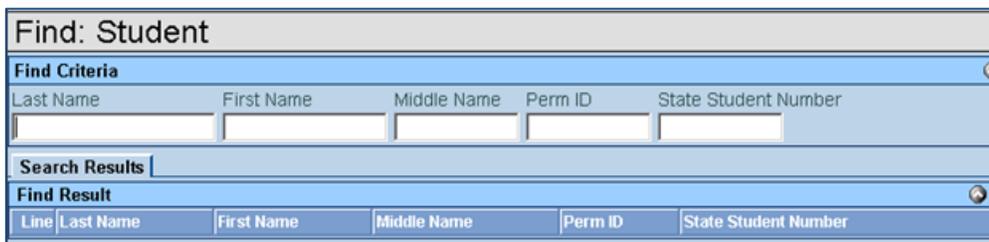


Figure 2-18 Find Student Screen

3. Enter all or part of any of the information in the white fields.
4. Click **Find**. Search Results opens a list of matching criteria.
5. Click line of student name. The line highlights.

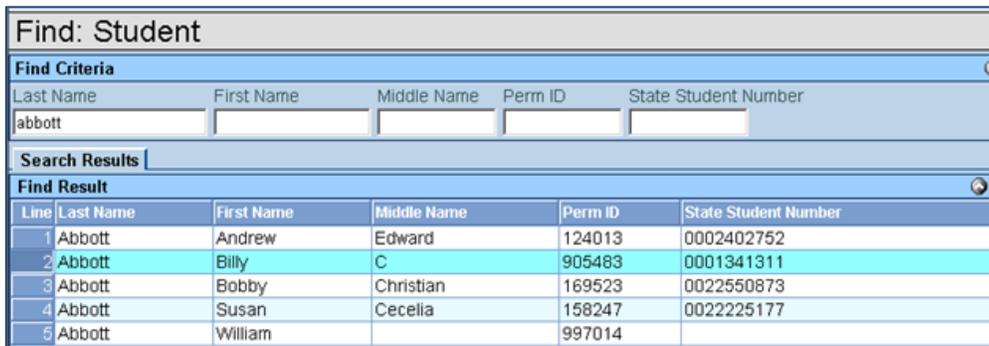


Figure 2-19 Find Student Screen Result

6. Click again or click **Select**. The Find: Student screen closes and the name displays.
7. Repeat the instructions above to insert the Student Name in the **Student to Delete** section...

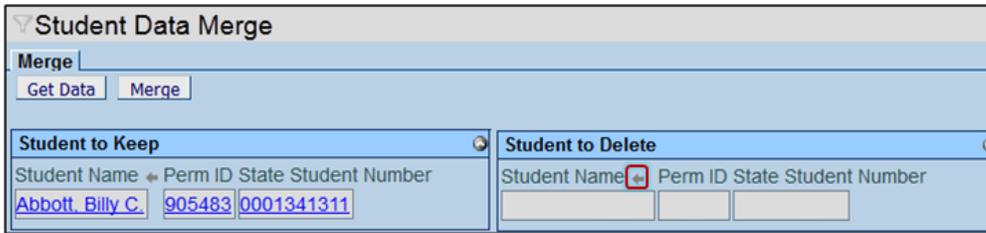


Figure 2-20 Student Data Merge Screen

- Click **Get Data** to see the records from both students. The students' records display in the grid below their names.

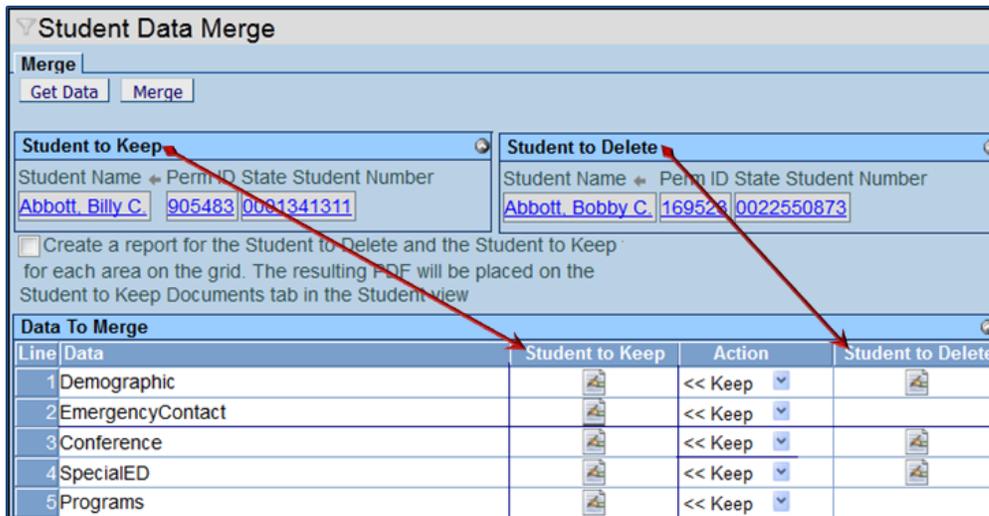


Figure 2-21 Student Data Merge Student Records Displayed

If the student record contains data than this icon displays. In the following example, the Student to Delete contains Demographic, Conference, SpecialEd, and Course History records.

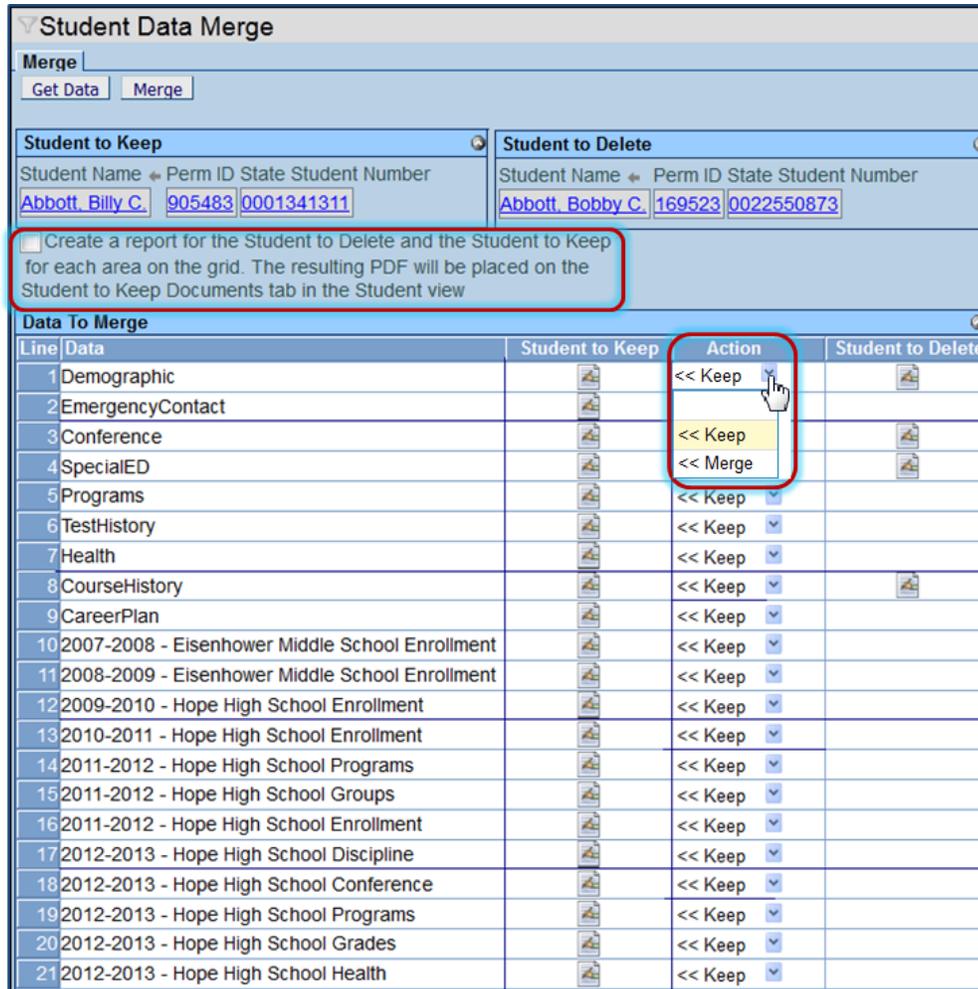


Figure 2-22 Student Data Merge Screen Data To Merge

- For each record listed, click the **drop-down under the Action column** and select one of the following:
Merge - to combine the information from both students
 OR
Keep – to use the Student To Delete information, discard the Student To Keep information.
 OR
Blank - to use the Student To Keep information, not use the Student To Delete information
- To generate a report format that records which records were merged, check the statement **Create a report.....** This report will be added to the Documents tab of the Student screen for the student listed as the Student To Keep. The report documents the final settings of the merge as well as a report for each line item for both students.
- Once all of the actions have been selected, click **Merge** to complete the process. BE SURE everything is set up correctly before clicking Merge, as this cannot be undone.

NOTIFICATIONS

Notifications alert staff of a student concern such as a health, enrollment, or a unique safety issue. It may relate that the student is receiving special services. Students may have multiple notifications. The notifications are configured on the Person Notification Codes screen. They are assigned to the appropriate students on the Student Notifications screen, after which, an icon displays at the top of every student related screen and TeacherVUE screen in Synergy SIS as shown below.

Once clicked, additional details display, as in the example that follows.

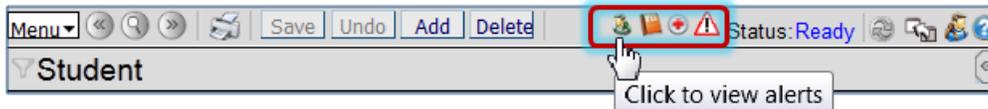


Figure 2-23 Student Notifications

Districts may customize Notification icons or use the four samples available for download from the Edupoint FTP site ([_Documentation/Synergy SIS/ System/Sample Notification Images](#)). Custom icons should be in GIF format and 20 x 20 pixels.

ADD ICONS FOR NOTIFICATIONS

1. Navigate to **Synergy SIS>System>Setup >System Configuration> Advanced** tab.

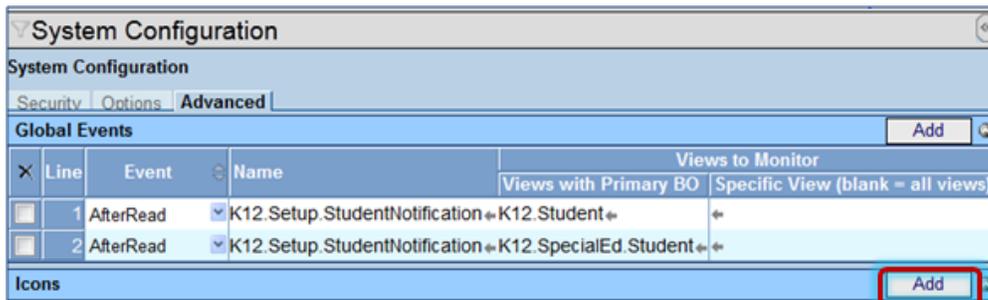


Figure 2-25 System Configuration Screen Advanced Tab

2. Click on Icons bar. The Attach Document screen opens.

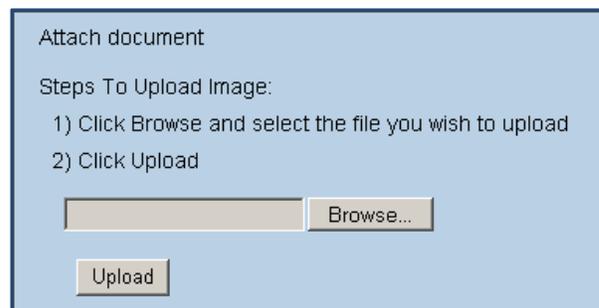


Figure 2-24 Attach Document Screen

2. Click and locate the icon file to upload.
3. Once the name and location of the file displays, click . When the file has been

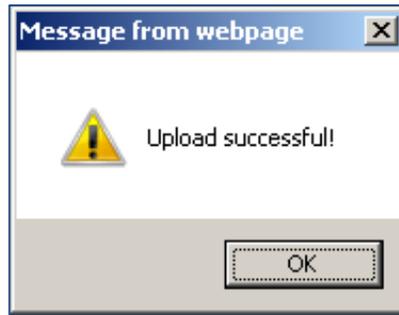


Figure 2-26 Message From Webpage

uploaded successfully, a message from webpage opens.

4. Click **OK** to close. The uploaded, icons are listed with an Icon Name and File Name. The Icon Name is automatically generated during the upload and is the same as the name of the file; however, the Icon Name can be edited.

Icons					Add
Line	Icon Name	File Name	Icon		
1	SIS_Notification_Disciplin	SIS_Notification_Discipline.gif		<input type="checkbox"/>	
2	SIS_Notification_ELL.gif	SIS_Notification_ELL.gif		<input type="checkbox"/>	
3	SIS_Notification_Medical.;	SIS_Notification_Medical.gif		<input type="checkbox"/>	
4	SIS_Notification_Sped.gif	SIS_Notification_Sped.gif		<input type="checkbox"/>	

Figure 2-27 System Configuration Screen Advanced Tab

CREATE NOTIFICATION

1. Navigate to **Synergy SIS>System>Setup>Person Notification Codes**.
2. Click . A new line is added to the Notifications grid.
3. Enter the **Order** in which this notification definition is to display on the Student Notifications screen menu.

Person Notification Codes							
Notification Setup							
Notifications							Add
Line	Order	Short Description	Description	Display Icon	Icon	View Name	
1		Health	Health - Peanut Allergy	Default			<input type="checkbox"/>
2		Enroll	Custody Issues	Default			<input type="checkbox"/>
3		Safety	Discipline Issues	Default			<input type="checkbox"/>
4	<input type="text"/>						<input type="checkbox"/>

Figure 2-28 Person Notification Codes Screen

4. Enter a **Short Description** of the type of notification such as Health or Safety. This must be a unique description.
5. Enter the complete **Description** of the notification. Click to spell check, if desired.
6. Select the **Display Icon** from the drop-down list. The default icon is the triangle.

To attach specific notifications to specific screens (leaving **View Name** blank will default icons to all Student related screens)

7. Click  in the Notification column. The Find: ViewDef screen opens.
8. Search for the screen either by **Namespace** or by **Name**. The name of the screen is the title that displays at the top of the screen, such as Student or Health. The namespace is the underlying code for the screen. Most student-related screens begin with K12 followed by a period, followed by the first name of the screen. For example, the Health screen starts with K12.HealthInfo.
9. Enter all or part of the **Namespace** or **Name**.
10. Click **Find**. Search Results displays a list of matching criteria.

Important: Be sure to select the main screen (the name of the screen as it displays on the screen), and not the name of the underlying grids that make up the screen. The underlying grids could produce some unintended results, since they are not formatted to display as a main screen. For example, in the search results below, Health, Health Log Other, and Health Screen are all main screens; however, HealthConditionDetail, HealthIncidentDetail, and HealthIncidentDetailAdd are not.

11. Click on the line of the Namespace desired. The line highlights.
12. Click **Select**. (Double clicking the line produces the same result.) The Find: ViewDef screen closes and the Namespace displays.
13. Click **Save**.

NOTIFICATION DISPLAY OPTIONS

There are several options available to determine what opens when the Notification icon is clicked.

1. Navigate to **Synergy SIS>System>Setup>District Setup**.
2. Click on the **System** tab, and scroll down to the bottom of the screen in the **Other Options** section.

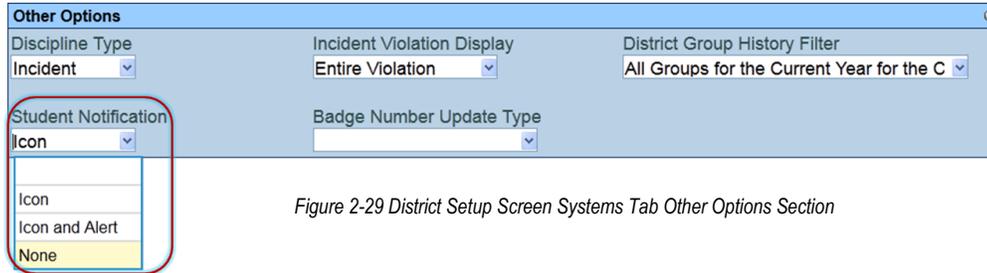
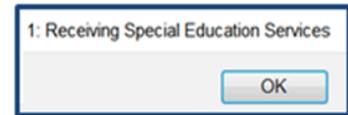


Figure 2-29 District Setup Screen Systems Tab Other Options Section

3. Select the notification method to be used from the **Student Notification** drop-down list.
4. Click **Save**.

Icon

After the icon is clicked, the alert for that notification displays.



Icon and Alert

Displays all of the student's notifications when a student related screen is selected. The icon does not need to be clicked. Once this screen is closed, alerts for icons display individually.

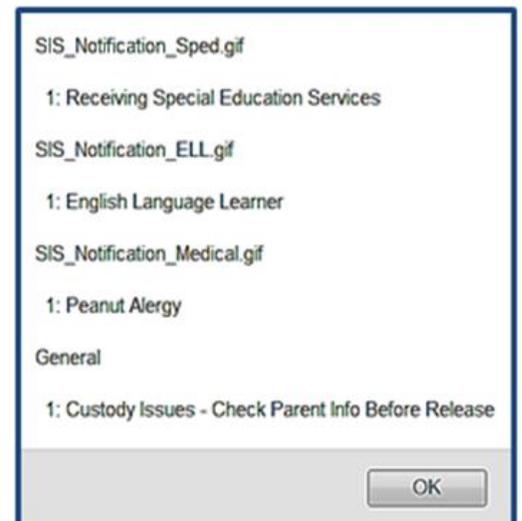


Figure 2-30 Illustration of Student Notification Alert Options

None

No icon displays.

STUDENT PROFILE REPORT

The STU201 - Student Profile report lists the student's demographic, parent, health, and emergency records. A release statement can be printed to specify under what conditions the information in the report is released. The release statement displays as shown on the next page.

Hope High School
Student Profile
 Abbott, Billy C. -- Homeroom: 234

Year: 2012-2013
 Report: STU201

General Information

Student Name Abbott, Billy C.		Pern ID 905483	Gender M	Grade 12
State ID 0001341311		Last Name Goes By Willy12		Nick Name Willy12
Birth Date 07/31/2002	Birth Place Mesa	Leave Date	Enter Date 08/28/2012	
Home Phone ###-###-####	Home Language Hopi	Resolved Race/Ethnicity Hispanic		
Home Address 1950 S mesa Dr Mesa, AZ 85234		Mailing Address 1950 S mesa Dr Mesa, AZ 85234		

Custodial Information

Mother Aaron, Kathleen		Employer	<input checked="" type="checkbox"/> Lives With	<input checked="" type="checkbox"/> Contact Allowed	<input checked="" type="checkbox"/> Mailings Allowed
Address 1950 S Val Vista Dr Mesa, AZ 85234		E-Mail pgulliford@edupoint.com	<input checked="" type="checkbox"/> Has Custody	<input type="checkbox"/> Ed. Rights	
Phone Type: Cell	Phone: ###-###-####	Extension:	<input type="checkbox"/> Primary	<input checked="" type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: Home	Phone: ###-###-####	Extension:	<input checked="" type="checkbox"/> Primary	<input checked="" type="checkbox"/> Not Listed	<input checked="" type="checkbox"/> Contact Phone
Father Aaron, Phillip		Employer	<input checked="" type="checkbox"/> Lives With	<input checked="" type="checkbox"/> Contact Allowed	<input checked="" type="checkbox"/> Mailings Allowed
Address 1950 S mesa Dr Mesa, AZ 85234		E-Mail pgulliford@edupoint.com	<input checked="" type="checkbox"/> Has Custody	<input type="checkbox"/> Ed. Rights	
Phone Type: Home	Phone: 480-555-1235	Extension:	<input type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: Work	Phone: 602-555-1234	Extension:	<input type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: Cell	Phone: 480-555-1234	Extension:	<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone

Health Conditions

Condition Medical Alert	Start Date 08/12/2009
Comment ADHD	
Condition Medical Alert	Start Date
Comment OCCASIONAL ASTHMA, SCOLIOSIS, ADHD	
Condition Medical Alert	Start Date 08/17/2009

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Figure 2-31 STU201 Student Profile Report

Hope High School
Student Profile
 Abbott, Billy C. -- Homeroom: 234

Year: 2012-2013
 Report: STU201

Comment
ASTHMA

IN CASE OF EMERGENCY: Names of persons who can assume temporary responsibility

Name	Relationship	Home Phone	Work Phone	Other Phone
Colin Howes	Sitter	480-555-1862		
Lauretta Jones	Relative	480-555-1545	Work Phone	Other Phone
Darryl King	Friend	480-555-1962	Work Phone	Other Phone

Physician: **Mesa Peds** Phone: **949-555-0831 222**

- Specify health conditions/allergies _____
- Is your child on daily medication? Yes ___ No ___ Specify _____
- Recent surgery, accident or illness (past year) _____

I, the undersigned parent/guardian, give my consent for the above named child to be released to me or my spouse or to the friend/relative I have so designated and/or to be taken by ambulance to the nearest hospital in case of emergency.

I understand that Edupoint School District does not provide accident medical/dental coverage for students for injuries/illnesses occurring at school. I understand that I may voluntarily purchase a student accident insurance plan.

I further acknowledge that I am financially responsible for medical, dental, ambulance, or other health care expenses or transportation of my child home, which might occur as a result of such illness or injury.

Acetaminophen (aspirin substitute) permission, to be given at the nurse's discretion
Please Initial One: _____ PERMITTED _____ NOT PERMITTED

Signature Parent/Guardian _____ Date _____

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Default Release Statement

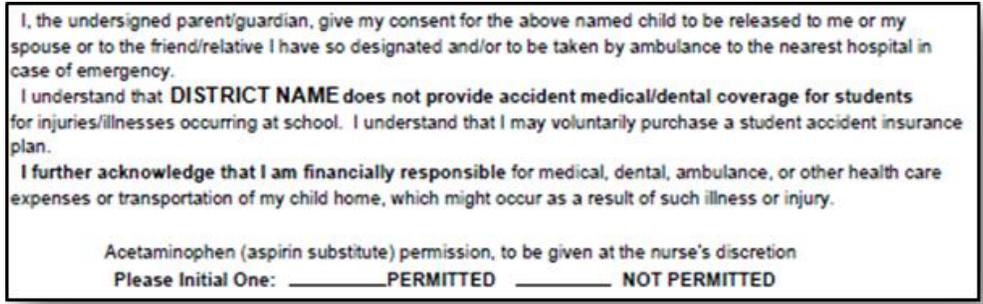
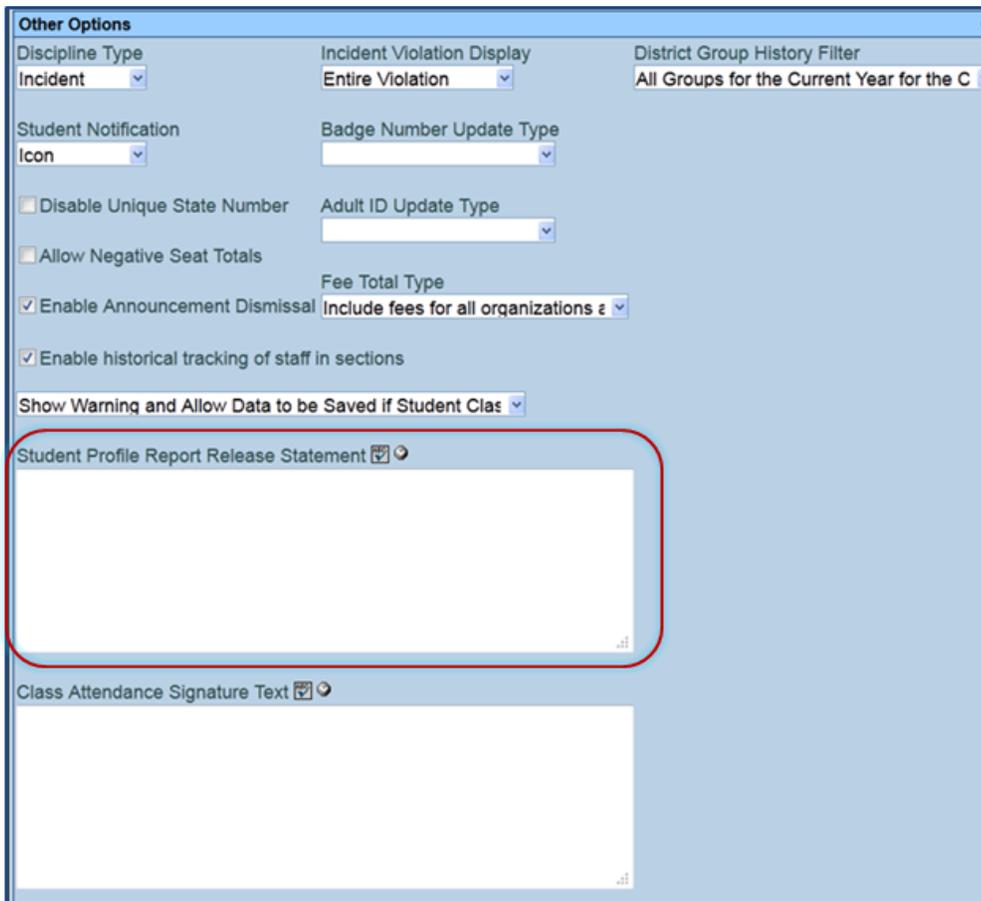


Figure 2-32 Default Release Statement on STU201

To create a custom release statement:



1. Navigate to **Synergy SIS>System>Setup>District Setup**.

Figure 2-33 District Setup Screen System Tab Other Options Section

2. Click on the **System** tab, and scroll to the bottom to the **Other Options** section.
3. Enter the release statement in the **Student Profile Report Release Statement** box. Click  to spell check. Click  for more space.
4. Click **Save**. The text entered will now display as the new release statement on STU201.

LOOKUP TABLES FOR THE STUDENT SCREEN

On the Student screen tabs there are several drop-down lists where the user can select a standard value for the field instead of typing the value. This produces more consistent and accurate data entry, as well as the ability to query consistent data for reports. Each drop-down list has its own Lookup table. Some tables are *Product-Owned* and cannot be changed but many tables can be edited to match the individual district's specifications.

Many of the values for the Lookup tables on the Student screen are mandated by the state. Those Lookup tables are outlined in the *Synergy SIS – State Data Reporting Guide* specific to your state, and they are not covered in this guide since they are state-specific.

LOCATING A LOOKUP TABLE

To discover the name of a Lookup table on a screen, navigate to the screen and hover the mouse over the drop-down list. A box pops up with the name of the table. This functionality is referred to as *show BO on mouseover*.

The Business Object (BO) in the example below indicates that the Lookup table name is **K12.Demographics.BirthVerification**.

The screenshot shows the 'Student Information' form with the 'Demographics' tab selected. The 'Birth Verification' dropdown menu is highlighted, and a tooltip appears showing the text: 'Birth Verification: (LOOKUP) - (K12.Demographics - Birth Verification)'. Other fields visible include Home Language Spoken at Home, Nick Name, Last Name Goes By, SAIS ID, Birth Date, Birth Place, Birth Certificate Num, Birth State, Birth Country, and Email.

Figure 2-34 Student Screen Demographics Tab

1. Navigate to **Synergy SIS>System>Setup>Lookup Table Definition**.



Reference: To see a list of Lookup tables that can be modified by the school district go to [Chapter One: Before Starting](#)

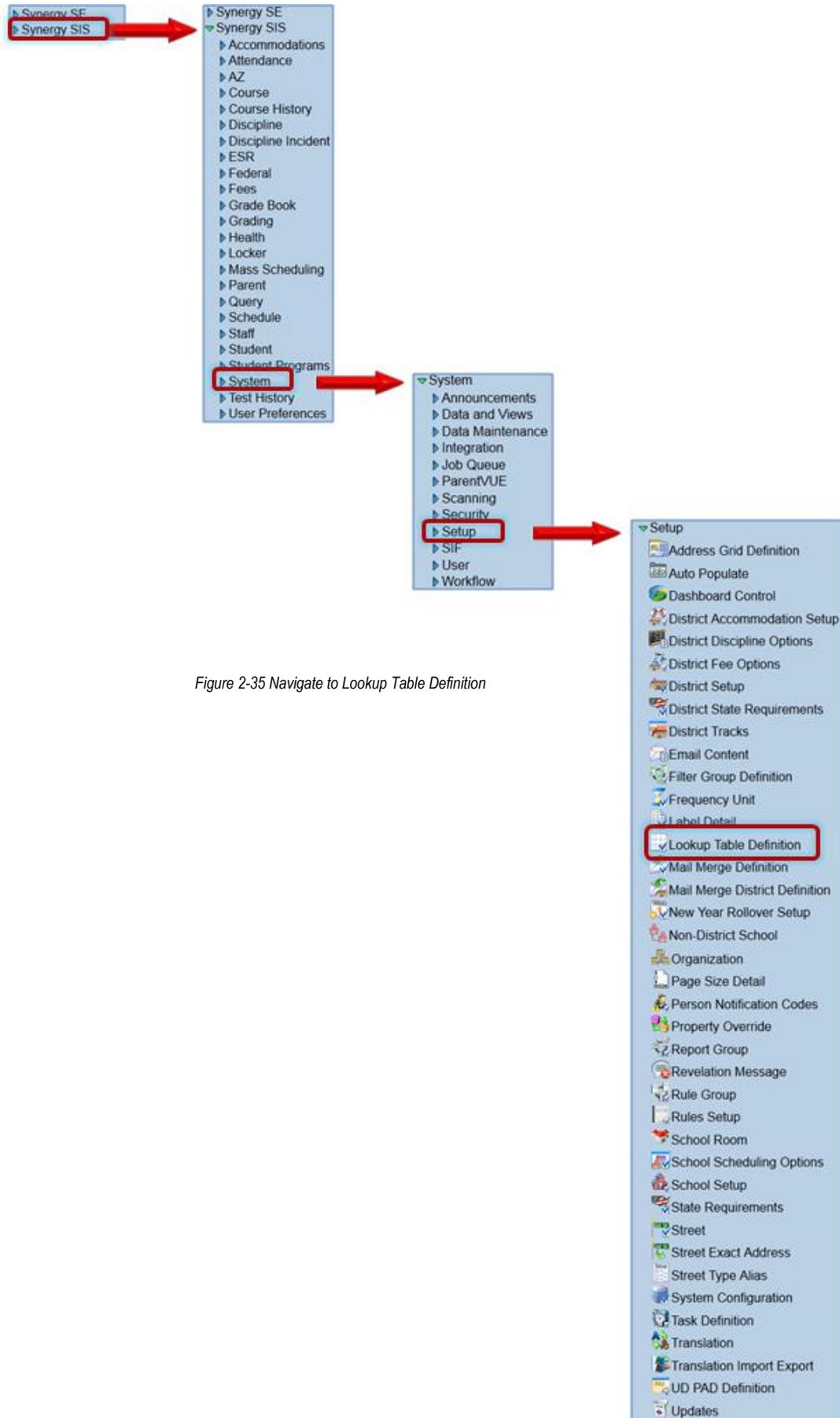


Figure 2-35 Navigate to Lookup Table Definition

2. Locate the **Lookup table** from the list by clicking on the triangles next to each node. Most of the Lookup tables for the Student screen are found under the nodes K12, K12.Demographics, and K12.Enrollment.

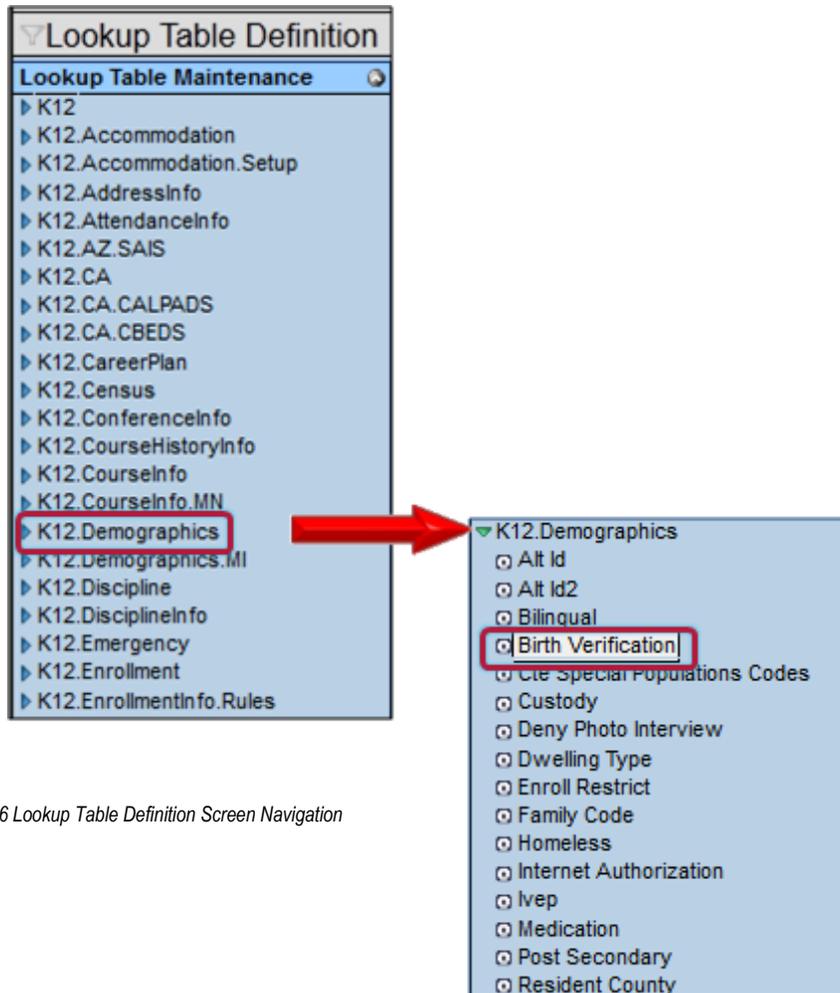


Figure 2-36 Lookup Table Definition Screen Navigation

To modify a lookup table's values:

1. Click **Add** on the Lookup Values bar.

Name: Birth Verification Namespace: K12.Demographics Locked: N

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a given value

Lookup Values										Add
Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status		
								Year Start	Year End	
1	0	1	Birth Certificate or Affidavit							
2	0	2	Baptism Certificate or Affidavit							
3										

Figure 2-37 Lookup Table Definition Screen Birth Verification Lookup Table

2. The order in which the values are displayed can be set by entering the order number in the **ListOrder** column. If the numbers in the ListOrder are the same or are all blank, the Code is used to sort the list and then the Description.
3. Enter a **Code** for the item. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
4. Enter the **Description** of the code.

5. 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.
6. If appropriate, enter **Year Start** and **Year End** dates to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.

The **State Code**, **Alt Code 3**, and **Alt Code SIF** are not needed since this information is not uploaded to the state. The checkbox at the top of the table **Use Code as the State Code** is not used as well.

Name: Birth Verification Namespace: K12.Demographics Locked: N

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code unless the State Code is non-blank for a given value

Lookup Values Add

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status	
								Year Start	Year End
1	0	1	Birth Certificate or Affidavit					▼	▼
2	0	2	Baptism Certificate or Affidavit					▼	▼
3	0	3	Other Verification Method					▼	▼

Figure 2-38 Lookup Table Definition Screen Value Added

7. Click **Save**.

The picture below illustrates the result of modifying the value of the Business Object.

Student Information

No Photo Home Language Spoken at Home Nick Name Last Name Goes By

Edupoint

On file SAIS ID Birth Date Birth Place Birth Verification Birth Certificate Num

Birth State Birth Country Email

Baptism Certificate or Affidavit
 Birth Certificate or Affidavit
 Other Verification Method

Figure 2-39 Student Screen Demographics Tab Student Information

To delete a value:

1. Check on the line of the desired Lookup Value.
2. Click **Save**.



Caution: The Lookup tables for the Student Contact Log are used for the Contact Log on the detailed screen of the Nurse’s Log, and the values in the Lookup tables should reflect the needs of both screens.

DISTRICT DEFINED CODES

Districts needing to capture additional information about a student, not already defined in an existing field, may customize the User Codes that display on the Other Info tab of the Student screen. There are additional fields that can capture custom information for each enrollment record, if needed.

The User Codes contain seventeen fields and are divided into two types: User Code 1 through 9 and User Num 1 through 8. User Code fields can either be entered as an alphanumeric value up to 10 characters or they can be setup as drop-down lists. User Num fields can either be entered as any numeric value up to an 8-digit number with two decimal places or they can be setup as drop-down lists.

User Codes				
User Code1	User Code2	User Code3	User Code4	User Code5
X	District			P
User Code6	User Code7	User Code8	User Code9	
	X			
User Num1	User Num2	User Num3	User Num4	
12.00		4.00		
User Num5	User Num6	User Num7	User Num8	
	6.00			

Figure 2-40 Student Screen Other Info Tab User Codes Section

To set up either the User Code fields and/or the User Num fields as drop-down lists:

1. Navigate to **Synergy SIS>System>Setup>District Setup**.

District Setup

District Setup

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

Enrollment Options

New Student Add Type Permanent ID Update Type
 Synergy | Manual update of permanent ID

Allow "No Show"

Require Summer Withdrawal Code/Date For "No Show"

Do Not Clear Summer Withdrawal Code and Date

Show SASxp Enrollment History

Validate SASxp Enrollment History

Show Emergency Contact as Lookup

Show User Code As Lookup

Show User Num As Lookup

Figure 2-41 District Setup Screen System Tab

2. Click on the **System** tab.
3. Check **Show User Code As Lookup** and/or **Show User Num As Lookup**. This sets all User Code and/or all User Num fields as drop-down lists.
4. Click **Save**. The fields then display as drop-down lists on the Other Info tab.

The screenshot shows a form titled "User Codes" with a light blue header. Below the header, there are two rows of dropdown menus. The first row contains "User Code1" (value: X), "User Code2", "User Code3", "User Code4", and "User Code5" (value: P). The second row contains "User Code6", "User Code7" (value: X), "User Code8", and "User Code9". Below these are two rows of "User Num" dropdown menus, labeled "User Num1" through "User Num8", all of which are currently empty.

Figure 2-42 Student Screen Other Info Tab

To setup the values displayed in the drop-down lists for each User Code and/or User Num field:

1. Navigate to **Synergy SIS>System>Setup>Lookup Table Definition**.
2. Find the table for the User Code under **K12.Demographics**. Each table is called User Code1, User Num1, etc.

The screenshot shows the "Lookup Table Definition" screen for "User Code1" in the "K12.Demographics" namespace. At the top, there is a checkbox labeled "Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code". Below this is a table with the following columns: Line, ListOrder, Code, Description, Other SIS, State Code, Alt Code 3, Alt Code SIF, and Status (with sub-columns for Year Start and Year End). A single record is visible with Line 1, ListOrder 1, Code 1, and Description "User Code 1 - Need Value". An "Add" button is located in the top right corner of the table area.

Figure 2-43 Lookup Table Definition Screen

3. Once the table is located, click **Add**.
4. A defined order can be set by entering the **ListOrder**. Otherwise, the values are sorted in alphanumeric order by the Description. If the numbers in the ListOrder are the same, the Description is used to sort the list.
5. Enter a **Code**. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
6. Enter a **Description** of the code.
7. The Other SIS column is used to import data during the conversion process from another student records system. Enter the **Other SIS** code used in the old system in this column.
8. If appropriate, a **Year Start** date and **Year End** date may be entered for the code to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.

The State Code, Alt Code 3, and Alt Code SIF are not needed since this information is not uploaded to the state. The checkbox at the top of the table, Use Code as the State Code, is not used as well.

9. Click **Save**.
10. To delete a code, check on the line of the record to delete.

11. Click **Save**.

The six fields that can be used to capture additional information about each enrollment record can be found on the Enrollment tab of the Student screen. There are two sets of fields available: 3 Enr User fields, and 3 Enr User DD fields. The Enr User fields can be entered as any alphanumeric value up to 25 characters, and the Enr User DD fields are configured as drop-down lists. These fields cannot be changed to or from a drop-down list configuration like the User Code fields.

The screenshot shows the 'Enrollment Activity' form. At the top, there is a 'Last Activity Date EffectiveDate' field with the value '09/17/2012'. Below this are several rows of fields: 'Grade' (12), 'Previous Grade', 'Exit Code', 'FTE' (1.00), 'Tuition Payer Code' (Eligible for state fun), 'District Of Residence' (123456000), and 'Instructional Setting' (1). The next row contains 'Program Code' (10), 'Special Enrollment Code', 'Special Program Code', 'Access 504' (1), and 'Homebound College Enrolled'. Below these are 'Came From' and 'Moved To' text boxes. A section containing 'Enr User 1', 'Enr User 2', and 'Enr User 3' text boxes is highlighted with a red box. Below that are 'Enr User DD 4', 'Enr User DD 5', and 'Enr User DD 6' drop-down menus, also highlighted with a red box. At the bottom, there is a 'Military Compact Statute' checkbox.

Figure 2-44 Student Screen Enrollment Tab

To setup the values displayed in the drop-down lists for each Enr User DD field:

1. Navigate to **Synergy SIS>System>Setup >Lookup Table Definition**.
2. Find the table for the Enr User DD field under **K12.Enrollment**. The tables are called User Dd 4, User Dd 5, and User Dd 6.
3. Once the table is located, click **Add**.
4. A defined order can be set by entering the **ListOrder**. Otherwise, the values are sorted in alphanumeric order by the Description. If the numbers in the ListOrder are the same, the Description is used to sort the list.
5. Enter a **Code**. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
6. Enter the **Description** of the code.
7. The Other SIS column is used to import data during the conversion process from another student records system. Enter the **Other SIS** code used in the old system in this column.
8. If appropriate, a **Year Start** date and **Year End** date may be entered for the code to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.
9. The State Code, Alt Code 3, and Alt Code SIF are not needed since this information is not uploaded to the state. The checkbox at the top of the table, Use Code as the State Code, is not used as well.
10. Click **Save**.
11. To delete a code, check on the line of the record to delete.
12. Click **Save**.

If the district has decided to implement some of these custom codes, it is helpful to change the name of the field to indicate the type of information being captured. The name of the field is referred to in Synergy SIS as the *label*. For example, the label could be changed from User Code 1 to Records Request Date.

To change field labels:

1. Navigate to **Synergy SIS>System>Setup >Property Override**.
2. Click on the **K12** node, then scroll down and click on the **K12.Enrollment Info** node.



Figure 2-45 Property Override Screen

The ENR and User Codes are located in three different places in Synergy SIS:
One location is on the Student screen, Enrollment tab, in the Enrollment Activity section.

Student Name: **Abbott, Billy C.** School: **Hope High School** Homeroom: 234 Teacher: **Sargent, L.** Custody: **Restrict**

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

Last Name: **Abbott** First Name: **Billy** Middle Name: **C** Suffix: Perm ID: **905483** Grade: **12** Gender: **Male**

0001341311 08/28/2012 E1

Enrollment Activity

Last Activity Date EffectiveDate
09/17/2012

Grade: **12** Previous Grade: Exit Code: FTE: **1.00** Tuition Payer Code: **Eligible for state fun** District Of Residence: **123456000** Instructional Setting: **1**

Program Code: **10** Special Enrollment Code: Special Program Code: Access 504: **1** Homebound College Enrolled:

Came From: Moved To:

Enr User 1: Enr User 2: Enr User 3:

Enr User DD 4: Enr User DD 5: Enr User DD 6:

Military Compact Statute

Another is the Enrollment History screen, Enrollment tab, School Enrollment detailed section,

Student Name: **Abbott, Billy C.** School: **Eisenhower Middle School** School Year: **2007-2008**

Enrollment Other Information

School Enrollment Add Hide Detail

Line	Enter Date	Enter Code	ADA/ADM	Track
1	08/06/2007			

Leave Date: Leave Code:

School Completion Code: College Enrolled:

Enrollment Activity Add

Line	Effective Date	Grade	Previous Grade	Exit Code	FTE	Inst Setting	Access 504	Enr User 1	Enr User 2	Enr User 3	Enr User DD 4	Enr User DD 5	Enr User DD 6
								1	2	3	DD 4	DD 5	DD 6

Figure 2-47 Enrollment History Screen Enrollment Tab

The third location is the Enrollment History screen, Other Information tab, User Codes section.

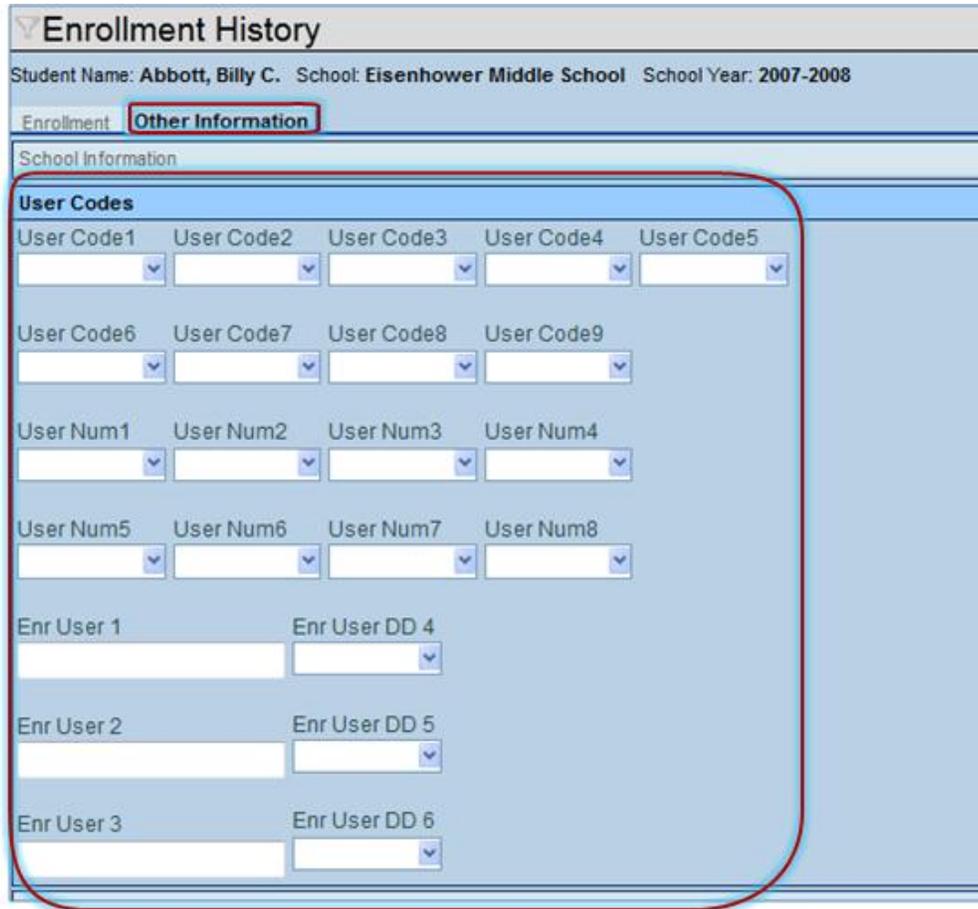


Figure 2-48 Enrollment History Screen Other Information Tab

Consequently, the label name needs to be changed in all three locations.

1. To change the labels for the:

Student screen, Enrollment tab, Enrollment Activity section, click on the **StudentSOREnrollment** node.

Enrollment History screen, Enrollment tab, School Enrollment detail, Enrollment Activity section, click on the **StudentEnrollmentActivity** node

Enrollment History screen, Other Information tab, User Codes section, click on the **StudentSchoolYear** node.

Field Name	Change labels for :
StudentEnrollmentActivity	Enrollment History screen, Enrollment tab, School Enrollment detail, Enrollment Activity section
StudentNoShow	
StudentSchoolYear	Enrollment History screen, Other Information tab, User Codes section
StudentSOREnrollment	Student screen, Enrollment tab, Enrollment Activity section
StudentTransferLock	
StudentYear	

Figure 2-49 Property Override Screen K12 Enrollment Info Node

- Click on the field name (listed below the node) to make the changes for each field.
- Enter the new **Label** name.

For the ENR fields, the names are **EnrUser1**, **EnrUser2**, **EnrUser3**, **EnrUserDD4**, **EnrUserDD5**, and **EnrUserDD6**.

For the User Code fields, it depends on whether or not they are setup to be Lookups.

If they are not Lookups, the User Code fields are **UserCode1**, **UserCode2**, **UserCode3**, **UserCode4**, **UserCode5**, **UserCode6**, **UserCode7**, **UserCode8**, **UserCode9**, **UserNum1**, **UserNum2**, **UserNum3**, **UserNum4**, **UserNum5**, **UserNum6**, **UserNum7**, and **UserNum8**.

If they are set as Lookups, the User Code fields are **UserCodeDD1**, **UserCodeDD2**, **UserCodeDD3**, **UserCodeDD4**, **UserCodeDD5**, **UserCodeDD6**, **UserCodeDD7**, **UserCodeDD8**, **UserCodeDD9**, **UserNumDD1**, **UserNumDD2**, **UserNumDD3**, **UserNumDD4**, **UserNumDD5**, **UserNumDD6**, **UserNumDD7**, and **UserNumDD8**.



Note: While there are many other field names that appear related to the ENR and User Codes, and the same field names listed above display in other nodes, only the fields listed above in the nodes specified have any impact on the labels displayed on the screens.

- Click **Save**.

Chapter Three: **ADDRESS OPTIONS**

In this chapter, the following topics are covered:

- ▶ Address Grid Verification
- ▶ Editing By Street
- ▶ Entering Non-Standard Streets
- ▶ Modifying Street & Unit Types
- ▶ Other Address Options

ADDRESS GRID VERIFICATION

If the schools use the student's home address (as entered in the Student screen) to assign students to a school, the grid codes need to be entered into Synergy SIS. A grid code is a code used to identify a geographic area of a city or county. It generally represents a square tract of land bounded by grid lines. The district may create their own codes or use ones created by a public source such as the MLS service.

Each grid code is assigned to one or more types of school (elementary, junior high and senior high), and can be used to determine the school assignment for returning students as part of the New Year Rollover process. It can be used for new enrollments throughout the year, also.

For example, if students south of Main Street attend Roosevelt Middle School and students north of Main Street attend Truman Middle School, this would be a *grid-based assignment*.

If students are manually assigned to a school without the grid-based verification, this is a *school-based assignment*.

In addition, the grid definitions are used to check and correct the validation of a student's address. Once new information is saved to the Student screen, the address is checked against the list of addresses in the Address Grid Definition. If the address is not found or is outside the grids defined for the school, a warning message is displayed.

To add a new grid code:

1. Navigate to **Synergy SIS>System>Setup>Address Grid Definition**.
2. Click **Add** at the top of the screen. A new Address Grid Definition screen opens.
3. Enter the **Grid Code**.

Figure 3-1 Address Grid Definition Screen

4. To assign a school to the grid code, click the ← next to the type of school to add. The Find School screen opens.
5. Enter all or part of the **School Name**.
6. Click **Find**. Search Results displays a list of matching criteria.

Figure 3-2 Find: School Screen

7. Click on the line containing the school name. The line highlights.
8. Click **Select**. (Double clicking the line accomplishes the same function.) The Find: School screen closes and the name displays.
9. Repeat the steps to enter the other types of schools, if needed.
10. Click **Save**.

Once the grid code has been saved and assigned to one or more schools, the next step is to define the street addresses that fall within the boundaries of the grid code. To define the street addresses:

Figure 3-3 Address Grid Definition Screen

1. Click **Add** on the Street Segments bar. The Street Definition screen opens.

Figure 3-4 Street Definition Screen

2. Enter the **Name** of the street and select the **Type** (avenue, road, street) from the drop-down list.
3. Enter the lowest address number in **Low** and the highest in the **High**.

4. Enter the address number **Increment**.
5. If the street is a boundary street between one grid code and another, one side of the street may belong to one grid code and the other side to a different grid code. Since odd numbers run along one side of the street and the other side of the street is even numbers, select the side of the street belonging to this grid code by selecting either **Odd or Even Street Numbers Only**. If left blank, all numbers are included.
6. If the direction information comes before the street name, such as N. 6th Ave., select the direction from the **Pre Direction** drop-down. If the direction information follows the street name such as 6th Ave NW, select the direction from the **Post Direction** drop-down list.
7. In some cities, the street type (Ave, St) is critical as the city has a street with the same name that is only differentiated by the type (a 6th St. and a 6th Ave.). To include the type of street in the validation, check **Use Street Type in Address Validation**.
8. If the address refers to a PO Box, check **This Street Segment is a PO Box**.
9. Enter the **City** and **State**, and the five-digit **Zip 5**. If the 4-digit add-on number is the same for all addresses in this grid, enter it in **Zip 4**.
10. Click **Save**.
11. Repeat steps to add additional streets to the grid code.

To modify the street details:

1. Click on the line number of the record to modify. The line highlights.
2. Click **Show Detail**. (Double clicking the line number accomplishes the same function.)
3. Edit any white field.
4. Click **Save**.

The screenshot shows the 'Address Grid Definition' screen. At the top, it displays 'Grid: 740A'. Below this is a 'Definition' section with a 'Grid Code' field containing '740A'. The 'Schools' section lists 'Elementary', 'Junior', and 'High' with links to 'Adams Elementary', 'Eisenhower Middle School', and 'Hope High School'. The 'Street Segments' section has a table with one row: '1 | 1 - 600 N 6th Av'. To the right of this table is a detailed view for 'Street Segment: 1 - 600 N 6th Av'. This view includes a 'Definition' section with fields for 'Name' (6th), 'Type' (Av), 'Low' (1), 'High' (600), 'Increment' (0), 'Odd / Even' (Odd Street Numbers Only), 'Pre Direction' (N), and 'Post Direction'. There are checkboxes for 'Use Street Type in Address Validation' (checked) and 'This Street Segment is a PO Box' (unchecked). The 'Location' section includes fields for 'City' (Greenville), 'State' (AZ), 'Zip 5' (85025), and 'Zip 4' (5463).

Figure 3-5 Address Grid Definition Screen

To remove a Street Segment:

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

To delete an entire grid code:

1. Remove all the streets, first.
2. Click **Delete** at the top of the screen.



Caution: If checking **Use Street Type in Address Validation**, be sure all addresses have a street type entered. Otherwise, the addresses will not validated.

EDITING BY STREET

The grid codes can be edited by street using the Street screen. The Street screen can be used to enter addresses without a grid code so the addresses can be verified but schools can still be assigned manually. To add a street segment:

1. Navigate to **Synergy SIS>System>Setup>Street**.
2. Click **Add** at the top of the screen. A new Street screen opens.

The screenshot shows the 'Street' screen with the following fields and sections:

- Details:** Name (text input), Type (dropdown menu).
- Definition:** Low Number (text input), High Number (text input), Increment (text input, value 0), Odd / Even (dropdown menu), Pre Direction (dropdown menu), Post Direction (dropdown menu). Checkboxes: Use Street Type, Is PO Box.
- Location:** City (text input), State (dropdown menu), Zip 5 (text input), Zip 4 (text input).
- Grid Info:** Grid Code (text input), Kindergarten, Elementary, Junior, High (dropdown menus).

Figure 3-6 Street Screen Add

3. Enter the **Name** of the street
4. Select the **Type** (avenue, road, street) from the drop-down.
5. Enter the lowest address number in **Low** and the highest in the **High**.
6. Enter the address number **Increment**.
7. If the street is a boundary street between one grid code and another, one side of the street may belong to one grid code and the other side to a different grid code. Since odd numbers run along one side of the street and the other side of the street is even numbers, select the side of the street belonging to this grid code by selecting either **Odd or Even Street Numbers Only**. If left blank, all numbers are included.
8. If the direction information comes before the street name, such as N. 6th Ave., select the direction from the **Pre Direction** drop-down. If the direction information follows the street name such as 6th Ave NW, select the direction from the **Post Direction** drop-down list.
9. In some cities, the street type (Ave, St) is critical as the city has a street with the same name that is only differentiated by the type (a 6th St. and a 6th Ave.). To include the type of street in the validation, check **Use Street Type in Address Validation**.
10. If the address refers to a PO Box, check **This Street Segment is a PO Box**.
11. Enter the **City** and **State**, and the five-digit **Zip 5**. If the 4-digit add-on number is the same for all addresses in this grid, enter it in **Zip 4**.
12. Click **Save**. The screen closes and the information displays.

1. To assign this street to a grid code, click on the ← next to **Grid Code**. The desired grid code must already exist in the Address Grid Verification screen. The Find: Grid screen opens.



Figure 3-7 Street Screen Grid Info Section

2. Enter all or part of the **Grid Code**, or **School Name**

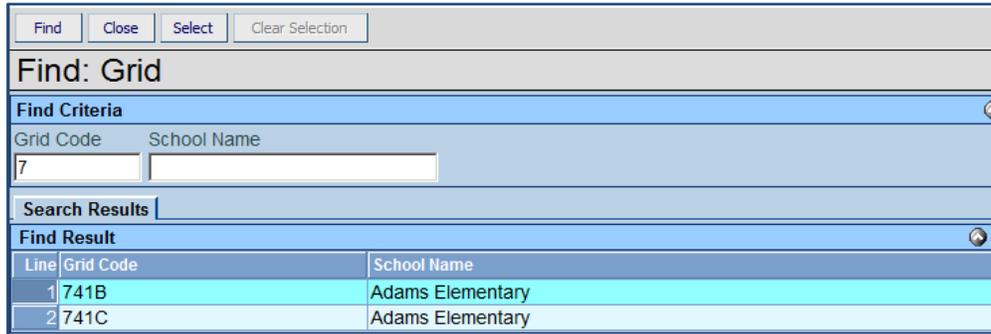


Figure 3-8 Find: Grid Screen

3. Click **Find**. Search Results displays a list of matching criteria.
4. Click on the line containing the grid code. The line highlights.
5. Click **Select**. (Double clicking the line accomplishes the same function.) The Find: Grid screen closes and the name displays.

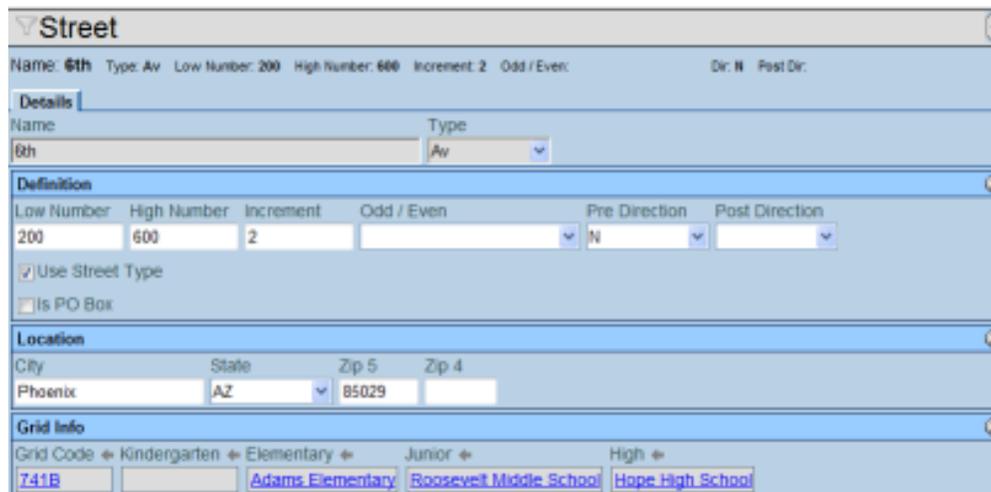


Figure 3-9 Street Screen

6. Click **Save**. Once the street has been saved, the **Junior High School** and **High School** assigned to the grid code display.

To edit the street name:

1. Click **Menu** and choose **Edit Street Data**.
2. Click **Save** when finished.

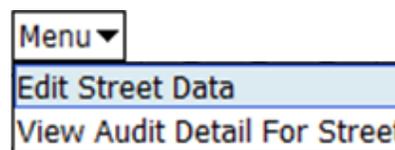


Figure 3-10 Street Screen Menu

ENTERING NON-STANDARD STREETS

Occasionally a street address may use a direction such as West, North, South, or East as part of the street name, and not a Pre Direction or Post Direction. To ensure address validation for these streets is accurate, an exception must be noted. To enter a street address exception:

1. Navigate to **Synergy SIS>System>Setup>Street Exact Address**.

Street Exact Address

Street Segment: Street Name: Street Type: Street Direction: Street Post Direction:

Street Exact Address

This screen is used to define special streets that do not follow the standard format. An example of such a street may be "West Virginia Ave". The actual street name is "West Virginia" and the street type is "Ave". There is no street direction. During the parsing of an address that uses this street, "West" should not be abbreviated.

Street Segment

Street Segment Help

Street Segment

Street Parts

Street Parts Help

Street Name	Type	Pre Direction	Post Direction

Figure 3-11 Street Exact Address Screen

2. Click **Add** at the top of the screen. A new Street Exact Address screen opens.

Street Exact Address

Street Exact Address

This screen is used to define special streets that do not follow the standard format. An example of such a street may be "West Virginia Ave". The actual street name is "West Virginia" and the street type is "Ave". There is no street direction. During the parsing of an address that uses this street, "West" should not be abbreviated.

Street Segment

Street Segment Help

Street Segment

Street Parts

Street Parts Help

Street Name	Type	Pre Direction	Post Direction

Figure 3-12 Street Exact Address Screen Access Help

3. For assistance with the screen, click **Maximize** for the **Street Segment Help** and **Street Parts Help** sections.
4. Enter the entire street address including the type of street, pre-directions, and post directions, in **Street Segment**.
5. Parse the street address into the appropriate boxes in the Street Parts section. Include the **Street Name**, **Type**, **Pre Direction**, and **Post Direction** as necessary.
6. Click **Save**.

MODIFYING STREET & UNIT TYPES

When an address is entered into the Student screen, the type of street (avenue, boulevard, etc.) and the type of unit (apartment, suite, etc.) are usually abbreviated. To ensure standardized address formatting, the street & unit abbreviations can be validated and corrected at the time the information is saved by checking possible entries against the pre-populated lists in the Street Alias screen. The Street Aliases are used in the Address Grid Definition and Street screens, also.

To control what street and unit information is corrected and validated, see [Other Address Options](#). To modify the assignment of a street type or unit type name to an abbreviation:

1. Navigate to **Synergy SIS>System>Setup>Street Type Alias**.

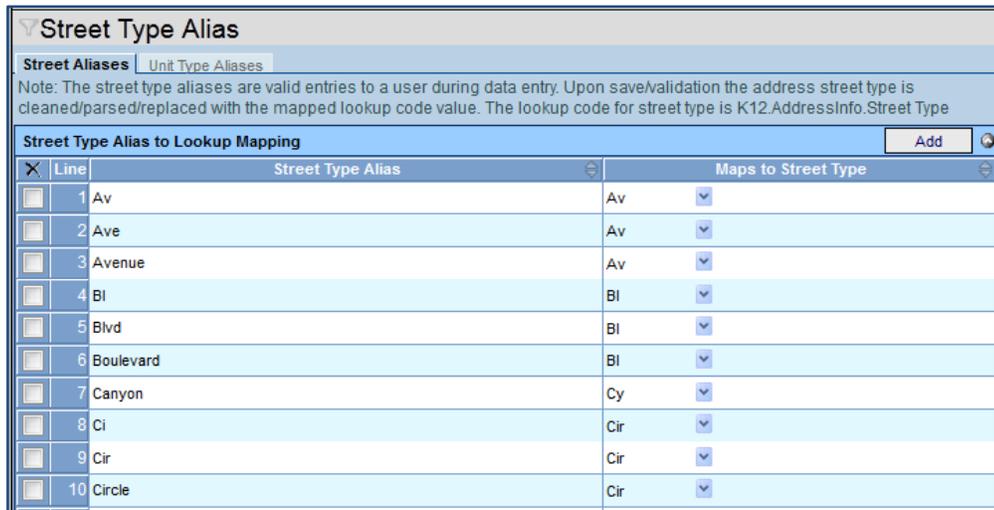


Figure 3-13 Street Type Alias Screen

2. To add a new street type entry, click **Add**. A new blank line is added to the bottom of the list.
3. Click in the appropriate column and modify the text to edit an existing entry.
4. Enter the variation of the street type that would be typed into the address in the **Street Type Alias**.
5. Select the abbreviation to use from the **Maps to Street Type** drop-down.
6. Click **Save**.

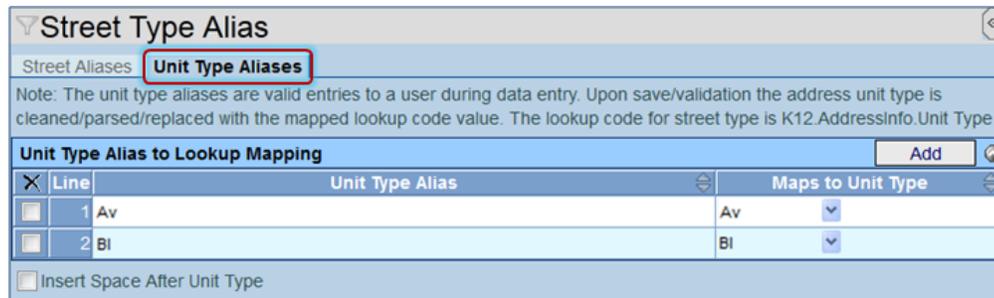


Figure 3-14 Street Type Alias Screen Unit Type Aliases Tab

1. To modify the unit type abbreviations, click the **Unit Type Aliases tab**.
2. To add a new alias, click **Add**. A new blank line is added to the bottom of the list.
3. Enter the **Unit Type Alias**.
4. Select the official abbreviation to be used from the **Maps to Unit Type** drop-down.

- To add a space after the unit abbreviations, check **Insert Space After Unit Type**.
- Click **Save**.

The Street Type abbreviations found in the Maps to Street Type column are pre-populated in Synergy SIS. To modify the abbreviation for the type of street:

- Navigate to **Synergy SIS>System>Setup>Lookup Table Definition**.
- Click on the node **K12.AddressInfo**.
- Click on **Street Type** table.
- Once the table is located, click **Add** to add a new code.
- To edit the code, simply modify the text in the various columns.

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Year Start	Year End
1		010	Av						
2		015	Bl						
3		020	Cl						
4		030	Ct						

Figure 3-15 Lookup Table Definition Screen Street Type Lookup Table



Caution: If any of the values in the Code column are modified, existing street type aliases that use that street type need to be re-mapped to the new code using the Street Type Alias screen.

- The order in which the values are displayed can be set by entering the **ListOrder**. If the numbers in the ListOrder are the same or are all blank, the Code is used to sort the list and then the Description.
- Enter a **Code** for the item. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
- Enter the **Description** of the code.
- The **Other SIS** is used to import data during the conversion process from another student records system. Enter the code used in the old system.
- If appropriate, a **Year Start** and **Year End** date may be entered to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.
- The **State Code**, **Alt Code 3**, and **Alt Code SIF** are not needed since this information is not uploaded to the state. The checkbox at the top of the table **Use Code as the State Code** is not used as well.
- Click **Save**.

To delete a code:

- Check  on the line of the record to delete.
- Click **Save**.

The **Street Directions** (N, S, E, etc.) are already entered into Synergy SIS as well. To modify these directions:

1. Navigate to **Synergy SIS>System>Setup>Lookup Table Definition**.
2. Click on the node **K12.AddressInfo**.
3. Click on **Street Direction** table.
4. Once the table is located, click **Add** to add a new code. To edit the code, simply modify the text in the various columns.

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Year Start	Year End
1		E	East						
2		N	North						
3		NE	Northeast						
4		NW	Northwest						

Figure 3-16 Lookup Table Definition Screen Street Direction Lookup Table



Caution: If any of the values in the Code column are modified, existing street type aliases that use that street type need to be re-mapped to the new code using the Street screen or the Address Grid Definition screen.

1. The order in which the values are displayed can be set by entering the **ListOrder**. If the numbers in the ListOrder are the same or are all blank, the Code is used to sort the list and then the Description.
2. Enter a **Code** for the item. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
3. Enter the **Description** of the code.
4. The **Other SIS** is used to import data during the conversion process from another student records system. Enter the code used in the old system.
5. If appropriate, a **Year Start** and **Year End** date may be entered to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.
6. The **State Code**, **Alt Code 3**, and **Alt Code SIF** are not needed since this information is not uploaded to the state. The checkbox at the top of the table **Use Code as the State Code** is not used as well.
7. Click **Save**.

To delete a code:

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

The final abbreviations that can be modified are the ones used to indicate an apartment or suite, called the **Unit Type**. The Unit Types are already entered into Synergy SIS as well, but they can be modified by:

1. Navigate to **Synergy SIS>System>Setup>Lookup Table Definition**.
2. Click on the node **K12.AddressInfo**.

3. Click on **Unit Type** table.
4. Once the table is located, click **Add** to add a new code. To edit the code, simply modify the text in the various columns.

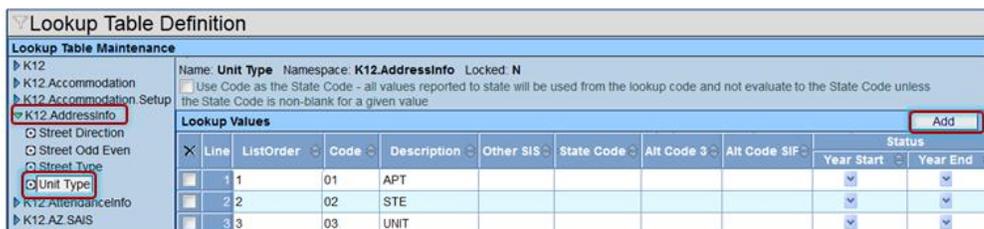


Figure 3-17 Unit Type Lookup Table

1. The order in which the values are displayed can be set by entering the **ListOrder**. If the numbers in the ListOrder are the same or are all blank, the Code is used to sort the list and then the Description.
2. Enter a **Code** for the item. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.
3. Enter the **Description** of the code.
4. The **Other SIS** is used to import data during the conversion process from another student records system. Enter the code used in the old system.
5. If appropriate, a **Year Start** and **Year End** date may be entered to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is not available for selection for new records. For example, if a code is no longer valid for records beginning FY2011, select 2011 for the end year.
6. The **State Code**, **Alt Code 3**, and **Alt Code SIF** are not needed since this information is not uploaded to the state. The checkbox at the top of the table **Use Code as the State Code** is not used as well.
7. Click **Save**.

To delete a code:

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

OTHER ADDRESS OPTIONS

To select the options to be used when entering student or parent addresses:

1. Navigate to **Synergy SIS>System>Setup>District Setup**.

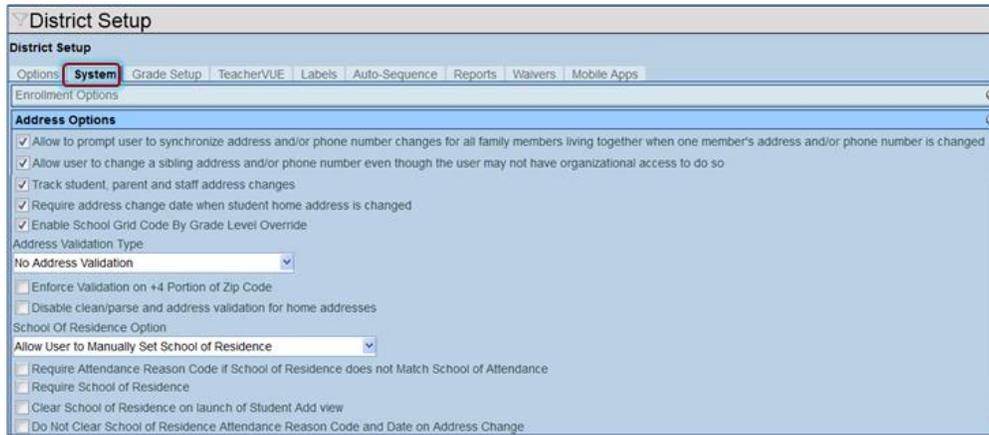


Figure 3-18 District Setup Screen System Tab

2. Click on the **System** tab and scroll down to the **Address Options** section.

The options for the addresses are:

- **Allow to Prompt User to Synchronize Address...**
If checked, when a student or parent’s address is changed in Synergy SIS, the system prompts to change the addresses for all of the family members in Synergy SIS.
- **Allow User to Change a Sibling Address...**
If checked, and the box to Allow to Prompt User to Synchronize Address... is checked, the staff member changing the address in Synergy SIS can modify the addresses of the student’s siblings even if they don’t have Update rights to the school where the siblings are enrolled.
- **Track Student, Parent, and Staff Address Changes**
If checked, previous addresses are saved in the system for tracking purpose. Previous student addresses are listed at the bottom of the Other Info tab of the Student screen in the Address History section. For parents, the Address History is at the bottom of the Demographics tab of the Parent screen. Staff Address History is at the bottom of the General tab of the Staff screen.

Address History							
Line	Change Date	Type	Address	City	State	Zip Code	
1	06/22/2011	Home	1953 S Val Vista Dr	Mesa	AZ	85234	

Figure 3-19 Student Screen Other Info Tab

- **Address Validation Type**

Select the type of address validation to use when the student is added or the address is changed from this drop-down list. The validation process can either use all of the address (Street Name & Number, City, Zip Code), or only validate on the street number and name. To use all of the address:

Select Normal Address Validation, or select Search Only on Street Number and Street Name to only use the street name and number. If all of the students in a district live in the same city, searching only on the street name and number will save time.

To turn off address validation, select No Address Validation. Addresses are matched against the information entered into the Address Grid Definition screen or Street screen, found under Synergy SIS>System>Setup. When the address information does not match any entered address information, a message box opens warning the user that the student may be outside the school's area.

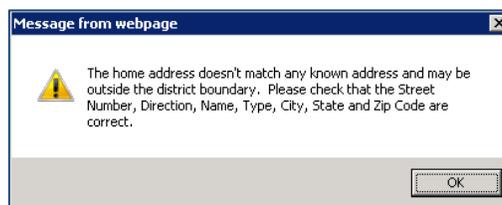


Figure 3-20 Address Validation Error Message

- **Enforce Validation on +4 portion of Zip Code**

If a type of address validation is selected, check this to include the last four digits of the extended Zip Code in the validation.

- **Disable Clean/Parse and Address Validation for Home Addresses**

If checked, the home address of the student or parent will not be validated as defined by the Address Validation Type. Nor will the addresses be cleaned or parsed. Address cleaning/parsing is used to standardize the street address entry. The codes for the street type will be standardized based on the Street Type Alias screen, found Synergy SIS>System>Setup. For example, if Ave is entered for Avenue, and the Street Type Alias is setup so that Avenue is always abbreviated Av, Ave will be changed to Av when the cursor is placed outside the Street Address field. It will remove the periods after the street direction or type, and regularize the capitalization and spaces, also.

- **School of Residence Option**

Select how the school of residence is chosen. The options are to **Allow User to Manually Set School of Residence**, **Default School of Residence from Grid Code**; **Allow Manual Override**, or **Set School of Residence from Grid Code; No Override Allowed**.

- **Require Attendance Reason Code if School of Residence does not Match School of Attendance**

Check this if an attendance reason code and date must be entered, if the school of residence does not match the school of attendance indicated by the grid code matching the student's address.

BULK MAILING

When printing reports that are designed to be mailed, such as the report card, the reports can be printed with the standard Bulk Mailing text in the stamp area of the report.

Bulk Mailing	
Postage Text PRESORTED FIRST-CLASS U.S. POSTAGE PAID 1234	Intelligent Mail Barcode Data Barcode ID: 40 Service Type ID: 700 Padded Mailer ID Length: 6 digits Mailer ID: 000123

Figure 3-21 District Setup Screen System Tab

1. To modify the text that displays in the stamp area, edit **Postage Text**. Click to spell check. Click for more space.
2. Click **Save**.

The Intelligent Mail Barcode (IM barcode) Data refers to services offered by the United States Postal Service for domestic mail delivery. This information is assigned by the USPS and currently may be used with the GRD203 - Report Card Pressure Sealed Trifold and the STU802 - Student Mailing Labels.

Map It!

In the Student screen, a **Map It!** button can be added to the Home Address section of the Demographics tab. This button takes the address entered, and searches for it using the map website selected in the setup. The map opens with the student's address location highlighted on the map.

Home Address	
Address	Effective Date
1953 South Val Vista Road	
City	State
Mesa	AZ
ZIP Code	+ 4
85250	<input checked="" type="checkbox"/> Mail same as Home Address
Grid Code	District of Residence by Address
M407A	
County by Address	

Figure 3-22 Student Screen Demographic Tab

To turn on the Map It! button:

1. Navigate to **Synergy SIS>System>Setup>System Configuration**.

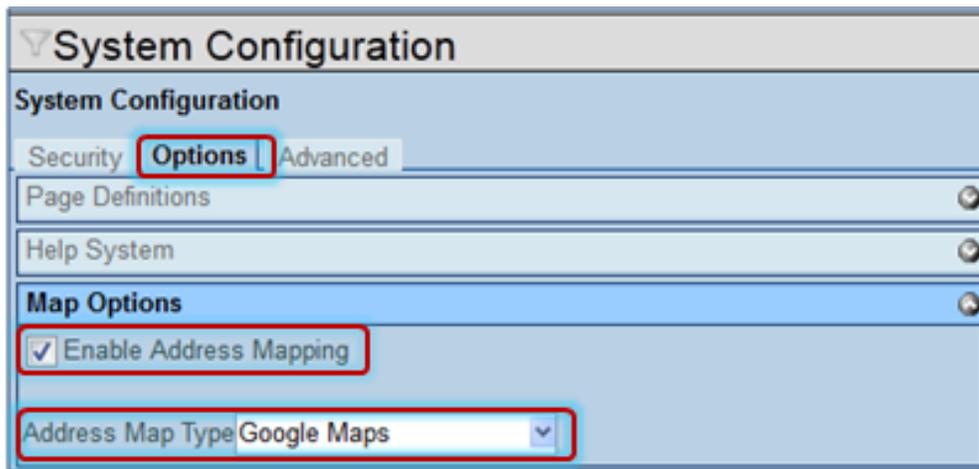


Figure 3-23 System Configuration Screen Options Tab

2. Click on the **Options** tab.
3. Check **Enable Address Mapping**.
4. Choose the **Address Map Type** drop-down. Currently **Google Maps** is the only option.
5. Click **Save**.

Chapter Four: **PHOTOS**

In this chapter, the following topics are covered:

- ▶ Attaching Photos to the Student Screen
- ▶ Installing the Photo Attach Software
- ▶ Photo CD/DVD Requirements
- ▶ Importing the Photos

ATTACHING PHOTOS TO THE STUDENT SCREEN

Student photos can be attached to the student record individually through the Student screen, or they can be imported in bulk using the separate Synergy SIS Photo Attach software or the Student Photo Attach screen found under Synergy SIS>Student>Setup.

Instructions for attaching photos individually are outlined in the *Synergy SIS – Student Information User Guide*. The following describes how to install the Photo Attach software and import the photos in bulk using either the Photo Attach software or the Student Photo Attach screen.

INSTALLING THE PHOTO ATTACH SOFTWARE

To install the Photo Attach software:

Go to the directory on the computer where the ZIP file with the current Synergy SIS release has been extracted. For instructions on how to download and extract the latest Synergy SIS release, please refer to the *Synergy SIS – System Installation Guide*. The software can be installed on any computer and does not have to be installed on a server.

1. In the extracted folder, locate and open the **PhotoAttach** folder.

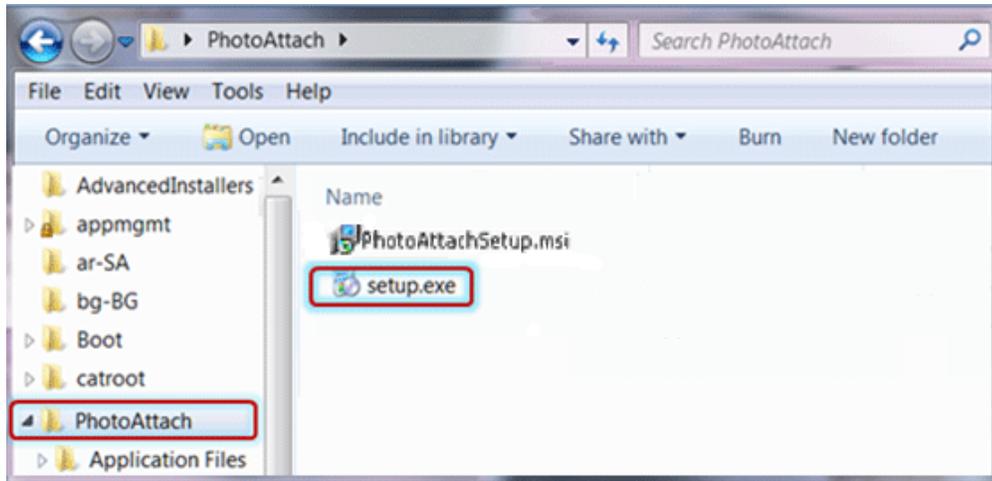


Figure 4-1 PhotoAttach Folder

2. Double-click on the **setup.exe** file to install the software. The software opens the Welcome to the Synergy SIS Photo Attach Setup Wizard screen.
3. Click **Next** to begin the installation.



Figure 4-2 Photo Attach Setup Wizard Screen

The software opens the Select Installation Folder screen. By default, the software installs in the Edupoint folder, and it installs only for the username running the installation.

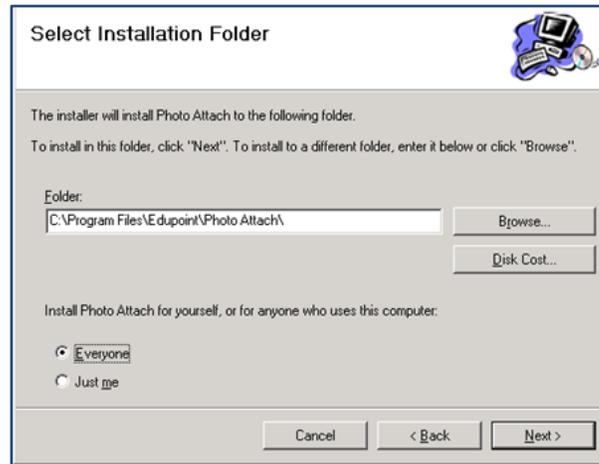


Figure 4-3 Select Installation Folder Screen

4. To change the installation location, enter the name of the **Folder** or click **Browse** to locate the new folder. The software may be installed to any folder.
5. Click **Disk Cost** to see the size required for the software installation and the disk space available in the currently selected folder.
6. To allow all users to run the Synergy SIS Photo Attach software, check **Everyone** instead of the **Just me**.
7. When all of the options have been selected, click **Next**. The software opens the Confirm Installation screen.
8. Click **Next** to install the software. When the software has been installed, the Installation Complete screen displays.
9. Click **Close**.

PHOTO CD/DVD REQUIREMENTS

For the photos to be imported in bulk into Synergy SIS, the CD/DVD from the photographer must follow the requirements below:

- **Image Size**
The digital photos must be 100 pixels wide by 125 pixels high. Other sized images may be used if they have the same height-width ratio.
- **Color Format**
24-bit color images are recommended, but 16-bit and 8-bit images may be used, also.
- **File Type**
Photo files must be in the Portable Network Graphic (*.png) format.
- **Storage Media**
Photos may be saved to a CD or DVD, or any type of external drive such as a flash drive. Kodak Photo CDs are not supported.

A reference file that matches the name of the photo file to the student's permanent ID must be included on the CD. Prior to the photo session, the school or district should create a text file listing student names and permanent IDs that can be given to the photographer so that the reference file may be created. This text file may include grade, class section, and gender to make it easier to match the photographs to the students. To create this text file:

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

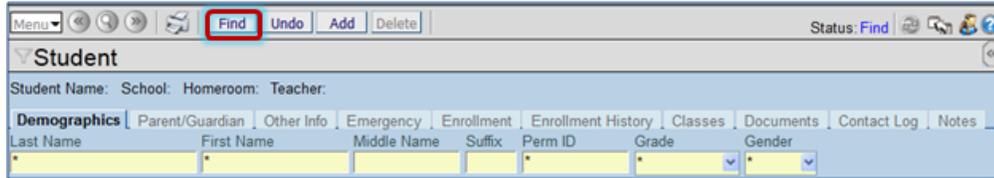


Figure 4-4 Student Screen

2. Enter an asterisk in each of the following fields: **Last Name, First Name, and Perm ID**. To include grade and gender, put an asterisk in the **Grade** and **Gender** fields, as well.
3. Click **Find** at the top of the screen. The Find: Results screen opens.
4. Change the **Output Type** to **CSV**
5. Click **Print**.

Query		Filter				
Open In Query	Print	Output Type	CSV	Save As Filter	Filter Name	Make Active
Students						
Line	Last Name	First Name	Middle Name	Perm ID	Grade	Gender
1	Abbott	Billy	C	905483	12	Male
2	Abel Jones Holbrook	Albert Joseph	Ryan	132683	12	Male
3	Acosta	Eugene	A	873921	12	Male
4	Acosta	John	Alvarez	150265	11	Male
5	Acunia	Kenneth	Ovante	110412	10	Male
6	Adair	Alan	William	871626	11	Male
7	Adair	Diane	N	903912	10	Female
8	Adair	Timothy	S	888621	11	Male
9	Adams	Albert	Lee	889844	11	Male
10	Adams	Bruce		142724	10	Male
11	Adams	Howard	Todd	873985	12	Male
12	Adams	Larry	A	889314	11	Male
13	Adams	Martin	C	887623	11	Male
14	Adams	Scott	M	939208	12	Male
15	Adams	Sean	B	877340	12	Male
16	Adams	Stephen	J	901622	10	Male
17	Adamski	Alan	M	872035	10	Male
18	Addington	Paula	M	871686	12	Female
19	Adkins	Ryan	Charles	924037	10	Male
20	Aelvoet	Jesse	Julius	944233	12	Male
21	Aguado	Bobby	J	943822	10	Male
22	Aguado	Karen	Cervantes	135319	12	Female
23	Aguilar	Carolyn	Christina	902692	10	Female

Figure 4-5 Student Find Result Screen

The resulting text file opens in a browser window in CSV (comma separated values) format.

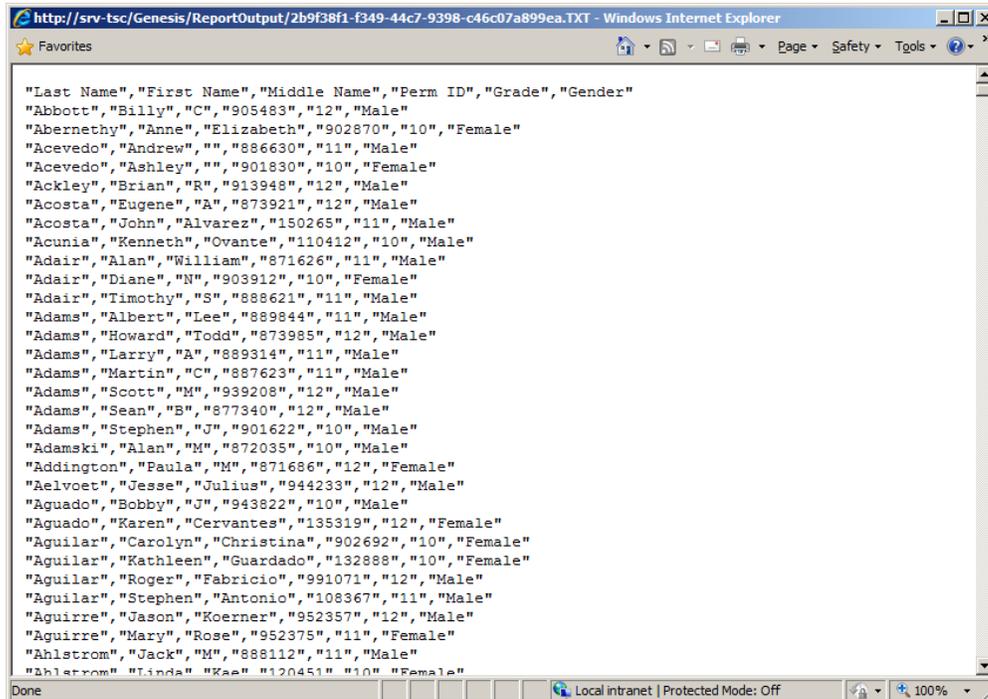


Figure 4-6 Student Photo Text File

1. Click **File...Save As** in the browser window.
2. Save the file to a disk or flash drive that can be given to the photographer.

CREATING THE REFERENCE FILE

The photographer must use the following instructions to create the reference file used to import the photos:

1. The file must be in a comma-delimited, text file format.
2. Each student's information is on a separate line, separated by a paragraph mark.
3. Each line contains two values, separated by a comma. No spaces should be used.
4. The first value is the student's permanent ID, which should be taken from the text file provided by the school. The ID must be 12 digits long and surrounded by quotation marks. If the student's ID is not 12 digits long, enter enough zeroes before the number to bring the total number of digits to 12.
5. The second value is the **name of the file** where the student's photo is saved. Do not include the directory information in the file name, and the filename should be surrounded by quotation marks.

A sample reference file should look like:

```
"000000000515", "Johnson.png"
```

```
"000000123456", "GESmith.png"
```

On the CD/DVD, all photos referenced in a single text file should be stored in a single folder. The reference file should be placed in the root folder. If there are multiple folders and reference files on the CD/DVD, the reference file should be named so that it is obvious what file references which folder. A sample CD folder structure is pictured below.

6th Grade	8/31/2009 9:02 PM	File Folder	
7th Grade	8/31/2009 9:02 PM	File Folder	
8th Grade	8/31/2009 9:02 PM	File Folder	
6th Grade.txt	8/31/2009 9:02 PM	Text Document	0 KB
7th Grade.txt	8/31/2009 9:03 PM	Text Document	0 KB
8th Grade.txt	8/31/2009 9:03 PM	Text Document	0 KB

Figure 4-7 Same CD Folder Structure

IMPORTING THE PHOTOS

Once the CD/DVD has been received from the photographer,

1. Verify that the photos are in the PNG format.
2. Check the reference file to make sure it follows the format outlined.
3. After it has been verified that everything has been created correctly on the CD/DVD, copy the files to the hard drive of the computer where the Synergy SIS Photo Attach software has been installed. The files should be copied as follows:
 1. Create a master folder named \Photo Import where the photos and reference files will be placed.
 2. Create two sub-folders in the \Photo Import directory; one called \Photos for the photo files and one called \Reference File for the reference file.
 3. Copy the photo files into the \Photos folder.
 4. Copy the reference file into the \Reference File folder.

To use the Photo Attach software to import the photos:

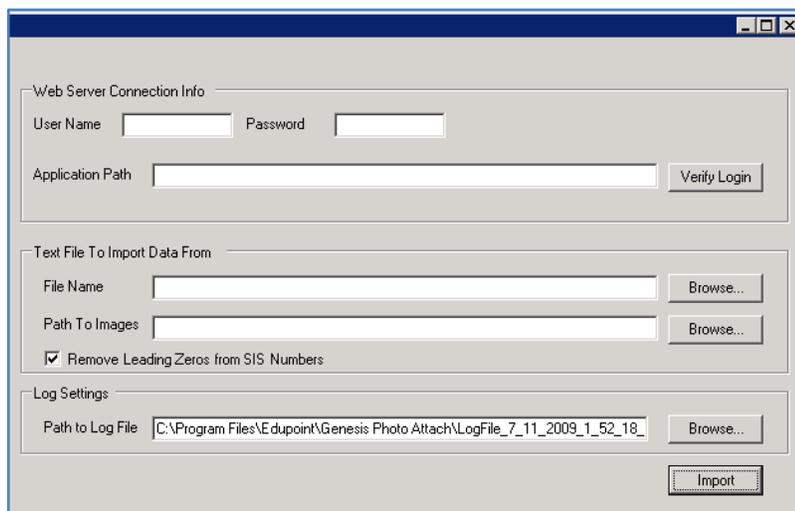


Figure 4-8 Photo Import Screen

1. Start the Synergy SIS Photo Attach software, generally located in the Start menu under the Program Files/Edupoint folder.
2. Enter a **User Name** and **Password** for Synergy SIS that has sufficient access rights to modify the Student screen.
3. Enter the URL for Synergy SIS in **Application Path**, such as http://Synergy SIS.
4. Verify that the username and password are correct by clicking **Verify Login**.
5. Enter the full folder location for the reference file in **File Name**, such as C:\photo import\reference file\grade6.txt. Click **Browse** to locate the file, if needed.
6. Enter the full folder location where the photos are saved in **Path To Images**, such as C:\Photo Import\Photos. Click **Browse** to locate the folder, if needed.

The permanent ID numbers in the reference file must match the permanent ID numbers in Synergy SIS exactly.

7. If it was necessary to add leading zeroes to the permanent ID number in the reference file to make the permanent ID 12 digits, check **Remove Leading Zeros from SIS Numbers** to remove the extra zeroes from the permanent ID.
8. By default, a log file of the results of the photo import process is saved to the C:\Program Files\Edupoint\Synergy SIS Photo Attach folder. To change the location of the log file or the name of the log file, edit the information in **Path to Log File** or click **Browse** to locate a different folder.
9. Click **Import** to import the photos.

If any errors occur in the import, check the following:

- Look at the log file for errors.
- The total number of permanent ID numbers in the reference file should match the number of photos in the Photos folder.
- Check the permanent ID numbers in the reference file to make sure they match the numbers in Synergy SIS.

To use the Student Photo Attach screen:

1. Log into Synergy SIS with a user account that has full update access to all students.
2. Navigate to **Synergy SIS>Student>Setup>Student Photo Attach**.



Figure 4-9 Student Photo Attach Screen

3. Click on the link to run the Photo Attach application. A security warning may open. If so, click **Run**. Once the software has run, the Photo Attach window opens.

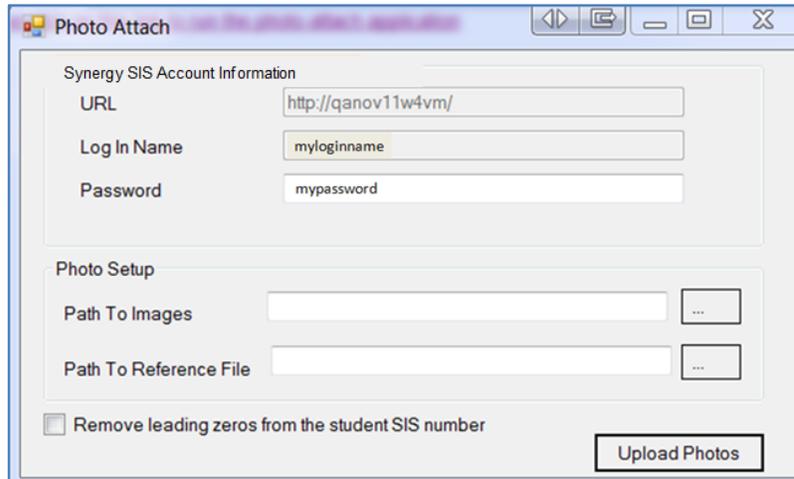


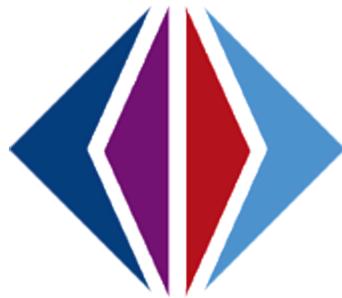
Figure 4-10 Photo Attach Screen

Note the URL to Synergy SIS and Log In Name are already filled in with the web server address and user name of the currently logged-in user.

4. Enter the **Password** for the current user.
5. Enter the full folder location in **Path To Images**, such as C:\Photo Import\Photos. Click to locate the folder, if needed.
6. Enter the full folder location in **Path to Reference File**, such as C:\photo import\reference file\grade6.txt. Click to locate the folder, if needed.

The permanent ID numbers in the reference file must match the permanent ID numbers in Synergy SIS exactly. If it was necessary to add leading zeroes to the permanent ID number in the reference file to make the permanent ID 12 digits, check **Remove Leading Zeros from SIS Numbers** to remove the extra zeroes from the permanent ID.

7. Click **Upload Photos**.



Chapter Five: **SECURITY**

In this chapter, the following topics are covered:

- ▶ The security node associations for Student-related screens

Security for each of the screens discussed throughout this manual is defined by two options: the PAD Security and the Security Definition. Both of these screens are found under Synergy SIS>System>Security. How each of screen works and how security is defined is covered in detail in the *Synergy SIS – Security Administrator Guide*. This chapter outlines where the security for the different parts of the student information-related screens may be defined in Security Definition.

ENROLLMENT MAINTENANCE SECURITY

The Enrollment Maintenance screen, found under Synergy SIS>System>Data Maintenance, is associated with two security nodes.

School of Record is associated with this security node:

K12.EnrollmentInfo.Maintenance.SchoolOfRecord

Enrollment Maintenance

Student Name: Perm ID:

This view does not implement any enrollment validation. Any modifications to a student's enrollment can cause severe problems.

Enrollment History

Last Name	First Name	Middle Name	Suffix	Perm ID

Gender

School of Record Add

No Show

Student School Year Add

Figure 5-1 Enrollment Maintenance Screen

Student School Year is associated with this security node:

K12.EnrollmentInfo.Maintenance.StudentSchoolYearMaintenance

STUDENT DATA MERGE SECURITY

The **Student Data Merge** screen, found under Synergy SIS>System>Data Maintenance is associated with this security node:

K12.EnrollmentInfo.Maintenance.StudentDataMergeGrid

Once both students are selected and the data has been retrieved, this security node controls whether or not changes may be made to the action to take for each data category.

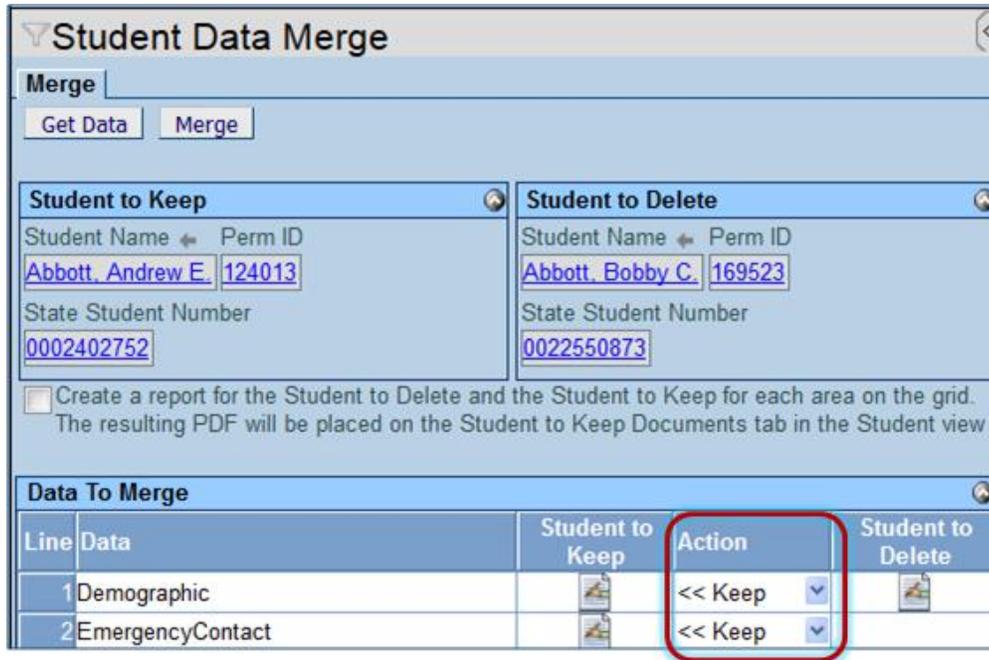


Figure 5-2 Student Data Merge Screen

ADDRESS GRID DEFINITION SECURITY

The **Address Grid Definition** screen, found under Synergy SIS>System>Setup, is associated with three security nodes.

Definition, Schools, and District of Residence are associated with this security node:

K12.AddressInfo.Grid

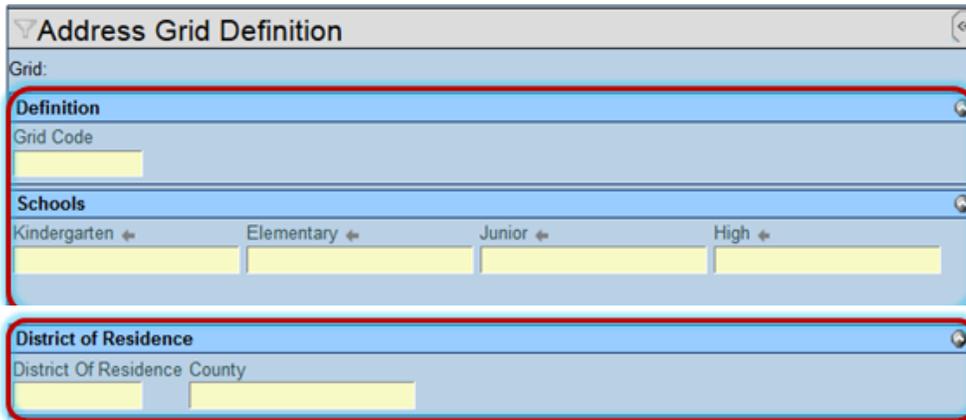


Figure 5-3 Address Grid Definition Screen

Organization Name under **Entries in the following grid will override the entries above**, is associated with this security node:

Revelation.OrganizationInfo.RevOrganization



Figure 5-4 Address Grid Definition Screen

Grade under **K12.AddressInfo.GridSchoolGrade** under **Entries in the following grid will override the entries above**, is associated with this security node:



Figure 5-5 Address Grid Definition Screen

Street Segments is associated with this security node:

K12.AddressInfo.Street



Figure 5-6 Address Grid Definition Screen

PERSON NOTIFICATION CODES

The **Person Notification Codes** screen, found under Synergy SIS>System>Setup, is associated with this security node:

Revelation.NotificationConfig

Person Notification Codes						
Notification Setup						
Notifications Add						
Line	Order	Short Description	Description	Display Icon	Icon	View Name
1	1	Allergy Nut	Peanut Allergy	SIS_Notification_M		K12.HealthInfo.Health
2	2	Enroll	Custody Issues - Check Parent Info Before Release	Default		
3	3	Safety	Discipline Issues - Chronic Offender	SIS_Notification_I		
4	4	Special Ed	Receiving Special Education Services	SIS_Notification_S		
5	5	ELL	English Language Learner	SIS_Notification_E		
6	6	Health	Medical Alert - Contact Nurse for Details	SIS_Notification_M		

Figure 5-7 Person Notification Codes Screen

STREET SECURITY

The **Street screen**, found under Synergy SIS>System>Setup, is associated with two security nodes.

Name, Type, Definition, and Location are associated with this security node:

K12.AddressInfo.Street

The screenshot shows the 'Street' screen with the following fields and sections:

- Header: Street
- Fields: Name, Type, Low Number, High Number, Increment, Odd / Even, Dir, Post Dir.
- Section: Details (containing Name and Type fields)
- Section: Definition
- Section: Location
- Section: Grid Info

Figure 5-8 Street Screen

Grid Info is associated with this security node:

K12.AddressInfo.Grid

Note: The **K12.AddressInfo.Street** security node is associated with the **Street Segments** grid on the Address Grid Definition screen, also.

Note: The **K12.AddressInfo.Grid** security node is associated with the **Grid Code** and **Schools** section of the Address Grid Definition screen, also.

STREET EXACT ADDRESS SECURITY

The **Street Exact Address screen**, found under Synergy SIS>System>Setup, is associated with this security node:

Revelation.RevAddressExact

Street Exact Address

Street Segment: Street Name: Street Type: Street Direction: Street Post Direction:

Street Exact Address

This screen is used to define special streets that do not follow the standard format. An example of such a street may be "West Virginia Ave". The actual street name is "West Virginia" and the street type is "Ave". There is no street direction. During the parsing of an address that uses this street, "West" should not be abbreviated.

Street Segment

Street Parts

Street Parts Help

Street Name	Type	Pre Direction

Post Direction

Figure 5-9 Street Exact Address Screen

STREET TYPE ALIAS SECURITY

The entire **Street Aliases tab** of the Street Type Alias screen, found under Synergy SIS>System>Setup, is associated with this security node:

K12.AddressInfo.StreetType

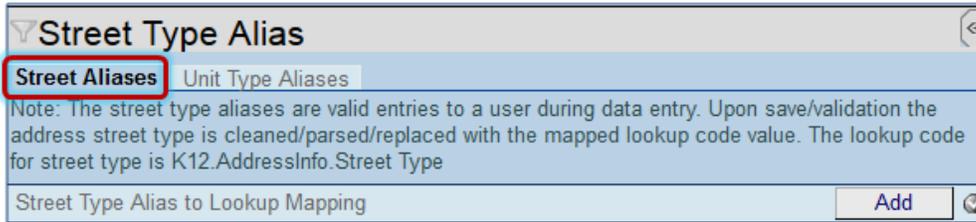


Figure 5-10 Street Type Alias Screen Street Aliases Tab

The entire **Unit Type Aliases tab** is associated with this security node:

K12.AddressInfo.UnitType

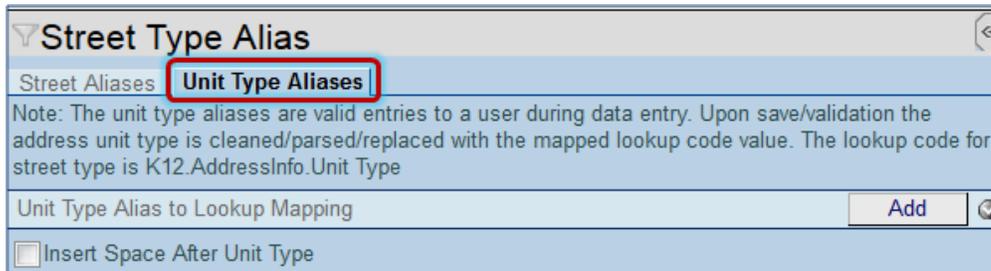


Figure 5-11 Street Type Alias Screen Unit Type Aliases Tab

STUDENT PHOTO ATTACH SECURITY

The **Student Photo Attach** screen, found under Synergy SIS>System>Setup, does not have any associated security nodes.



Figure 5-12 Student Photo Attach Screen

MASS ASSIGN COUNSELOR SECURITY

The **Mass Assign Counselor** screen, found under Synergy SIS>Student, is associated with three security nodes.

Conditions is associated with this security node:

K12.EnrollmentInfo.MassAssignCounselorCond

The rest of the **Assignment Options** tab is associated with this security node:

K12.EnrollmentInfo.MassAssignCounselor

The screenshot shows the 'Mass Assign Counselor' interface. At the top, there are fields for 'Definition Name', 'School Name', and 'FullYear'. Below these is a tabbed interface with 'Assignment Options' selected and highlighted by a red box. Under the 'Assignment Options' tab, there is a large yellow text area and an 'Assign Counselors' button. At the bottom of the screen, there are two sections: 'Counselors' and 'Conditions', with the 'Conditions' section highlighted by a red box.

Figure 5-13 Mass Assign Counselor Screen Assignment Options Tab

The **Students** tab is associated with this security node:

K12.EnrollmentInfo.MassAssignCounselorStu

The screenshot shows the 'Mass Assign Counselor' interface with the 'Students' tab selected and highlighted by a red box. The 'Assignment Options' tab is also visible. Below the tabs, there are fields for 'Definition Name', 'School Name', and 'FullYear', and an 'Assign Counselors' button. A note reads: 'Any student included in this grid will be included in the results if he or she meets the criteria on the Assignment Options tab.' At the bottom, there is a 'Students' section with a 'Chooser' button.

Figure 5-14 Mass Assign Counselor Screen Students Tab

MASS EMAIL SECURITY

The **Mass Email** screen, found under Synergy SIS>Student, is associated with several security nodes.

The **Options tab** is associated with this security node:

K12.ParentGuardianInfo.EmailUI

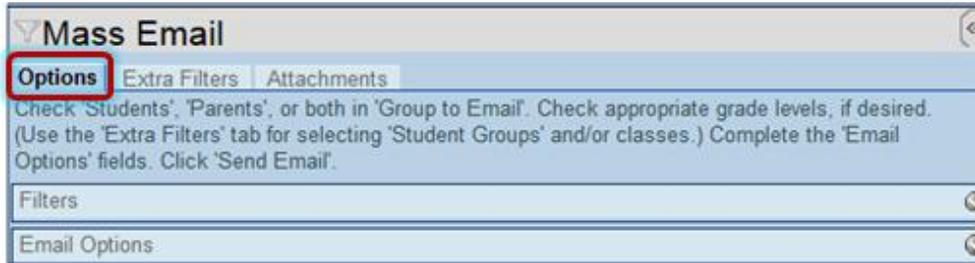


Figure 5-15 Mass Email Screen Options Tab

On the **Extra Filters tab**



Figure 5-16 Mass Email Screen Extra Filters Tab

Student Groups grid is associated with this security node:

K12.StudentGroupsInfo.Setup.DistrictStudentGroups

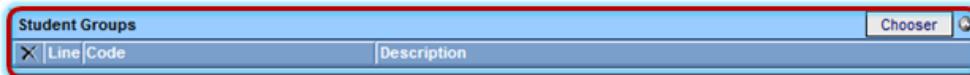


Figure 5-17 Mass Email Screen Extra Filters Tab

Class Selection grid is associated with several security nodes:

Section ID, Begin Period, and Term Code are is associated with this security node:

K12.ScheduleInfo.Section

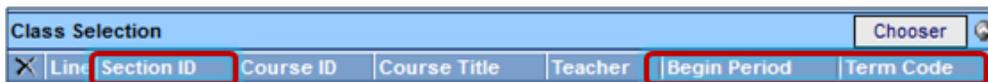


Figure 5-18 Mass Email Screen Extra Filters Tab

Course ID and **Course Title** are associated with this security node:

K12.CourseInfo.Course



Figure 5-19 Mass Email Screen Extra Filters Tab

Teacher is associated with this security node:

K12.Staff



Figure 5-20 Mass Email Screen Extra Filters Tab

The **Attachments tab** is associated with this security node:

Revelation.UserInfo.RevUserTempEmailAttach



Figure 5-21 Mass Email Screen Attachments Tab

NATIVE AMERICAN SECURITY

The **Native American** screen, found under Synergy SIS>Student, is associated with this security node:

K12.DemographicInfo.NativeAmerican

The screenshot shows a web-based form titled "Native American" with a back arrow icon in the top right corner. Below the title, there are fields for "Student Name:", "School:", "Status:", and "Homeroom:". A section titled "Native American Information" contains several input fields: "Last Name", "First Name", "Middle Name", "Suffix", and "Perm ID". Below these are "Grade" and "Gender" dropdown menus. At the bottom, there are three sections: "Identification" with a search icon, "Funding" with a search icon, "Supplies" with a search icon, and "Release Form" with a search icon.

Figure 5-22 Native American Screen

PERSON SEARCH SECURITY

The **Person Search** screen, found under Synergy SIS>Student, is associated with this security node:

K12.DemographicInfo.PersonSearchGrid

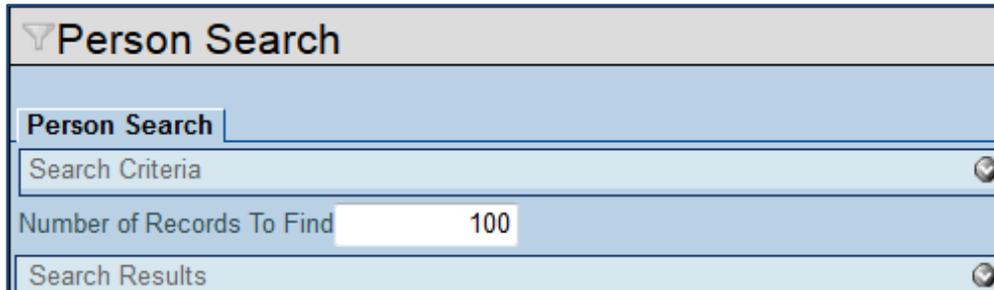


Figure 5-23 Person Search Screen

PHONE SEARCH SECURITY

The **Phone Search** screen, found under Synergy SIS>Student, is associated with these security nodes.

Search Criteria is associated with this security node:

K12.DemographicInfo.PhoneSearchGridUI

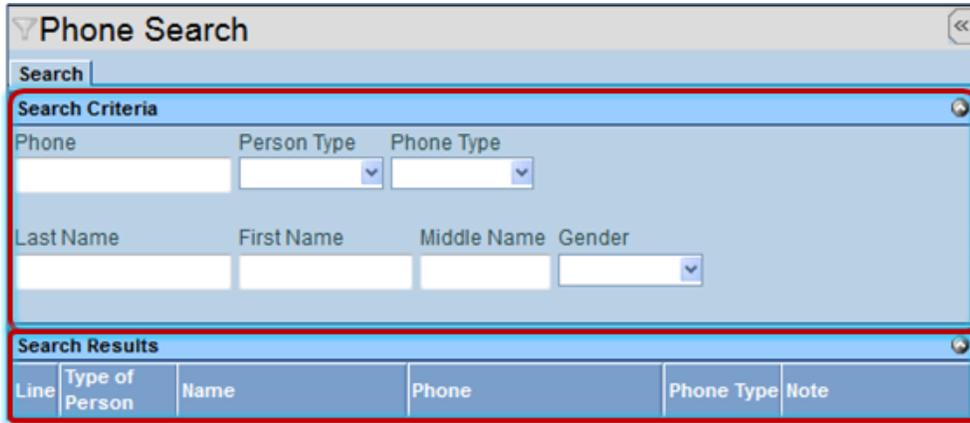


Figure 5-24 Phone Search Screen

Search Results is associated with this security node:

K12.DemographicInfo.PhoneSearchGridFB

STUDENT SECURITY

The **Demographics** tab of the Student screen is primarily associated with the node:

K12.Student

Student Name: School: Homeroom: Teacher:

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History Classes

Last Name First Name Middle Name Suffix Perm ID Grade

Gender

Student Information

Race and Ethnicity

Home Address Mail Address

School of Residence Reason for Attendance Reason for Attendance Date

Phone Numbers Add

Favorite Book

Figure 5-25 Student Screen Demographics Tab

The **Race and Ethnicity** section on the Demographics tab is associated with the security node:

Revelation.RevPersonSecondaryEthnic

The screenshot shows a web interface for a student's profile. At the top, there is a header 'Student' with a dropdown arrow and a back arrow. Below this, there are fields for 'Student Name', 'School', 'Homeroom', and 'Teacher'. A navigation bar contains several tabs: 'Demographics' (highlighted with a red box), 'Parent/Guardian', 'Other Info', 'Emergency', 'Enrollment', 'Enrollment History', 'Classes', and 'Doc'. The main form area includes fields for 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', and 'Grade'. Below these are 'Gender' and 'Student Information' sections. The 'Race and Ethnicity' section is highlighted with a red box and contains a 'Hispanic/Latino' dropdown, a 'Resolved Race/Ethnicity' dropdown, and a 'Race' section with checkboxes for 'White', 'Black or African American', 'American Indian', 'Asian - Chinese', 'Asian - Other', 'Pacific Islander - Hawaiian', and 'Pacific Islander - Other'. Below this are sections for 'Home Address', 'Mail Address', 'School of Residence', 'Reason for Attendance', 'Reason for Attendance Date', 'Phone Numbers' (with an 'Add' button), and 'Favorite Book'.

Figure 5-26 Student Screen Demographics Tab

The **Phone Numbers grid** at the bottom of the Student screen Demographics tab is associated with the node:

K12.StudentPhoneNumber

The screenshot shows the 'Student' screen with the 'Demographics' tab selected. The 'Phone Numbers' section is highlighted with a red box, showing a table with the following columns: Line, Primary, Type, Phone, Extension, Contact, and Not Listed. An 'Add' button is visible to the right of the table.

Figure 5-27 Student Screen DemographicsTab

When **changing a student's address**, the screen that opens to prompt all of the related family members' addresses is associated with this security node:

K12.DemographicInfo.CopyStudentData

The screenshot shows the 'Manage Family Addresses' dialog box. The text inside reads: "This dialog allows you to coordinate any home address, mail address and/or home phone number changes for all family members, if needed. (NOTE: You will only see entries in the Address and Phone Number grids if the values that are changing differ from their current values)". Below this, it says: "If you do not wish to update a family member please uncheck the box next in the appropriate row. The new address(es) will be the following:". At the bottom, there is a label "People to Change Addresses for".

Figure 5-28 Manage Family Addresses Screen

The **Activate Student** function and **Inactivate Student** function are associated with this security node:

K12.EnrollmentInfo.StudentActivateInactivate

Figure 5-29 Activate Student Screen

Figure 5-30 Inactivate Student Screen

The **No Show** function is associated with this security node:

K12.EnrollmentInfo.StudentNoShow

Figure 5-31 No Show Student Screen

The **Add Student** function and **Transfer Student** function are associated with this security node:

K12.EnrollmentInfo.StudentAddExtObj

Student Find										
Search Criteria										
Student Search										
Students										
Line	Status	Student Name	Gender	Birth Date	Perm ID	Current/Previous Enrollment				
						School	School Year	Grade	Leave Code	Leave Date

Figure 5-32 Student Find Screen

The **Parent/Guardian tab** of the Student screen is associated with this security node:

K12.ParentGuardianInfo.StudentParent

Student Name: School: Homeroom: Teacher:

Demographics **Parent/Guardian** Other Info Emergency Enrollment Enrollment History Classe

Last Name First Name Middle Name Suffix Perm ID

Grade Gender

Parents and Guardians Add Show Detail

Siblings

Figure 5-33 Student Screen Parent/Guardian Tab

The **Other Info** tab of the Student screen is associated with various security nodes:

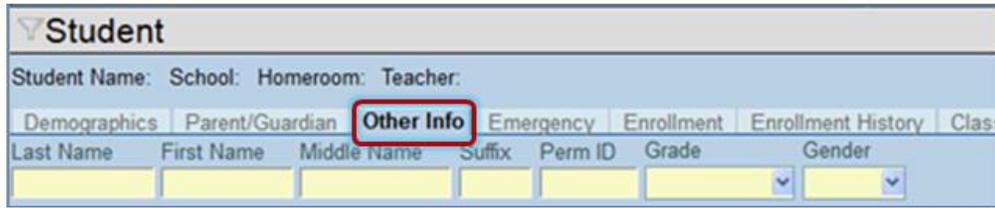


Figure 5-34 Student Screen Other Info Tab

Other Information, Enrollment Restrictions and Exceptions (except School Type Exceptions), Internet Authorization, Notes, Prev Year, Transportation Requirements (Wheelchair only), Transportation Logistics Information (Primary Phone only) and Graduation Information sections are associated with this security node:

K12.Student

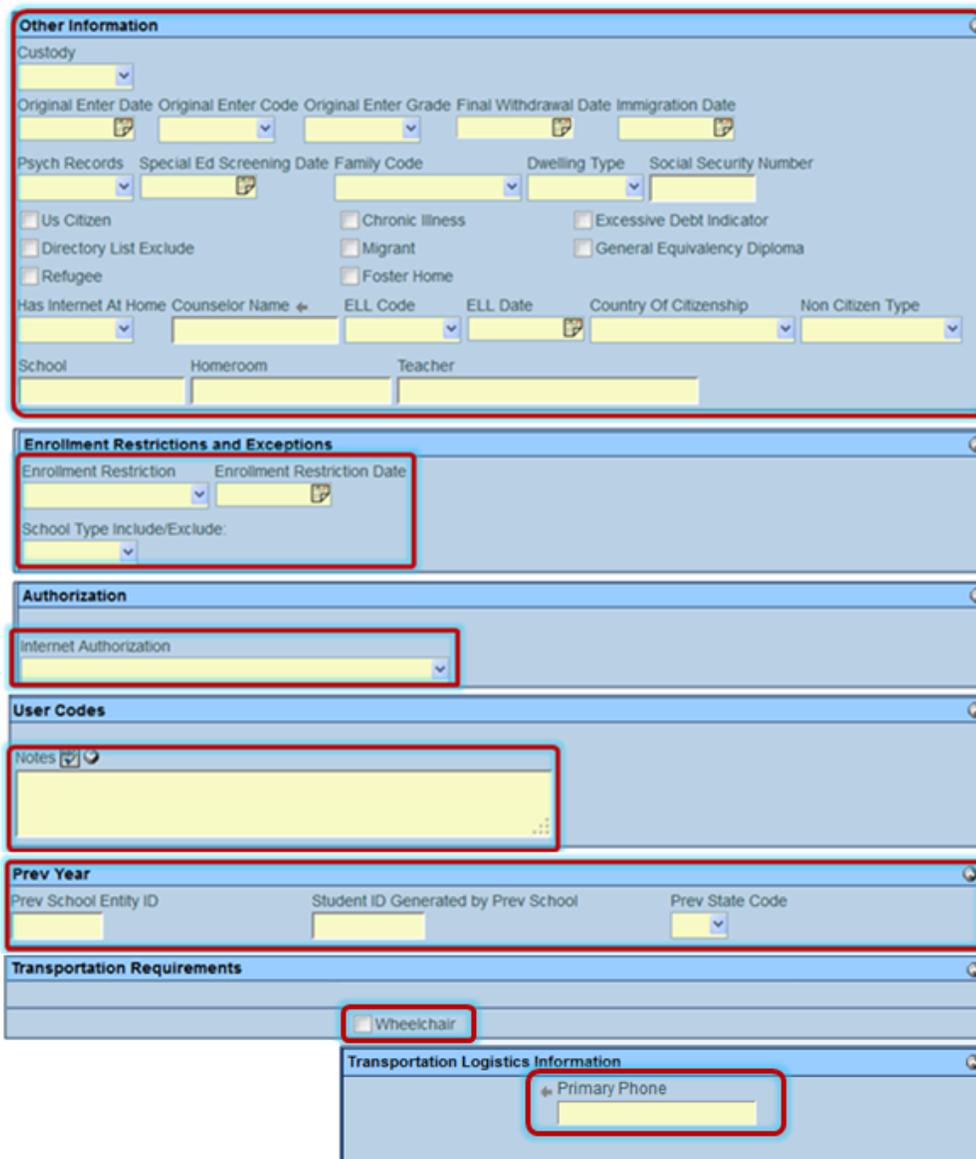


Figure 5-35 Student Screen Other Info Tab

School Information, Next Year, Registration, Summer School, Authorization (except **Internet Authorization**), **User Codes** (except **Notes**), **Transportation, Pick Up /Drop Off Information, Transportation Requirements** (not **Wheelchair**), **Special Requirements Comment**, and **Transportation Logistics Information** (not **Primary Phone**) are associated with this security node:

K12.EnrollmentInfo.StudentSOREnrollment

The screenshot displays five distinct sections of a web form, each with a blue header and a light blue body. The sections are: 1. **School Information**: Contains fields for 'Bus Route To School', 'Bus Route From School', 'Locker Number', 'IVEP', and 'Allow Medication', along with checkboxes for 'Extend Learning Program', 'Vocational', 'Has Changed Flag', and 'AllowTylenol'. 2. **Next Year**: Contains dropdown menus for 'Year End Status', 'Next Grade Level', and 'Next School'. 3. **Registration**: Contains fields for 'Registration Last Updated', 'Registration Received', and 'Significant Student Data Change', with checkboxes and document icons. 4. **Summer School**: Contains dropdown menus for 'Summer Grade Level' and 'Summer School'. 5. **Authorization**: Contains a dropdown for 'Deny Photo/Interview' and checkboxes for 'Absence Reporting Policy' and 'Statement Of Awareness'. A red rectangular box highlights the 'Deny Photo/Interview' dropdown and the 'Absence Reporting Policy' and 'Statement Of Awareness' checkboxes in the Authorization section.

Figure 5-36 Student Screen Other Info Tab

User Codes				
User Code1	User Code2	User Code3	User Code4	User Code5
<input type="text"/>				
User Code6	User Code7	User Code8	User Code9	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
User Num1	User Num2	User Num3	User Num4	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
User Num5	User Num6	User Num7	User Num8	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Transportation		
Transport Code	Transportation Request Date	Transportation Start Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Pick Up Information	Drop Off Information
Transportation Type Bus Route	Transportation Type Bus Route
<input type="text"/>	<input type="text"/>
Bus Stop	Bus Stop
<input type="text"/>	<input type="text"/>
Pick Up Time Pick Up Location Type Pick Up School	Drop Off Time Drop Off Location Type Drop Off School
<input type="text"/>	<input type="text"/>
Address	Address
<input type="text"/>	<input type="text"/>
City State Zip Code <input type="button" value="Map It!"/>	City State Zip Code <input type="button" value="Map It!"/>
<input type="text"/>	<input type="text"/>
Comment	Comment
<input type="text"/>	<input type="text"/>
Transportation Reason Code Transportation Reason Date	Transportation Reason Code Transportation Reason Date
<input type="text"/>	<input type="text"/>
Responsible Person Phone	Responsible Person Phone
<input type="text"/>	<input type="text"/>

Special Transportation Requirements	
Transportation Requirements	
Special Transportation Requirements <input type="checkbox"/> <input type="checkbox"/>	
<input type="checkbox"/> A/C <input type="checkbox"/> Ramp <input type="checkbox"/> Seat Belts <input type="checkbox"/> Aide	
<input type="checkbox"/> Leave Unattended (at Pick Up and Drop Off)	
Special Requirements Comment	Transportation Logistics Information
Special Requirements Comment	Special Program Teacher
<input type="text"/>	<input type="text"/>
	School Start Time School Dismiss Time
	<input type="text"/>
	Next School of Attendance Form Completed By
	<input type="text"/>

Figure 5-37 Student Screen Other Info Tab

School Type Exceptions is associated with this security node:

K12.StudentEnrollmentRestrictionSchoolType



Figure 5-38 Student Screen Other Info Tab

Organization Exemption is associated with this security node:

K12.StudentEnrollmentRestrictionOrganization



Figure 5-39 Student Screen Other Info Tab

Additional Addresses is associated with this security node:

K12.TransportationInfo.AdditionalTransportationLocation

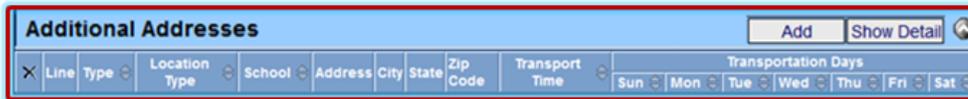


Figure 5-40 Student Screen Other Info Tab

Lockers is associated with this security node:

K12.LockerInfo.StudentLocker

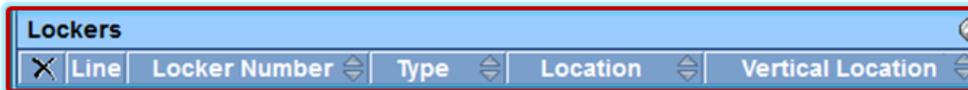


Figure 5-41 Student Screen Other Info Tab

The **Emergency** tab of the Student screen is associated with several security nodes:

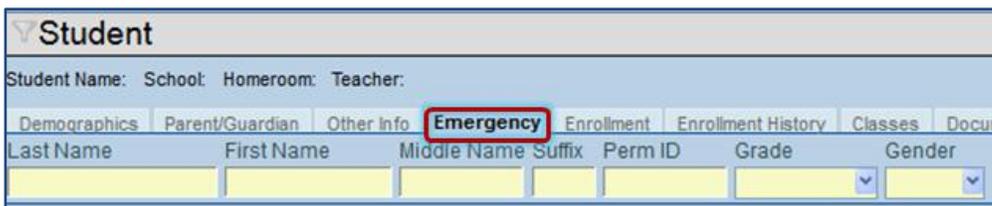


Figure 5-42 Student Screen Emergency Tab

Emergency Contacts is associated with this security node:

K12.EmergencyInfo.Emergency



Figure 5-43 Student Screen Emergency Tab

Physician and Dentist Information is associated with this security node:

K12.EmergencyInfo.Physician

Physician Information

Physician Name: _____ Phone: _____ Extension: _____ Hospital: _____

Comment:

Has Insurance: Insurance Company: _____ Insurance Phone: _____

Dentist Information

Dentist Name: _____ Dentist Phone: _____ Extension: _____ Dental Office: _____

Dental Comment:

Figure 5-44 Student Screen Emergency Tab

Contact Order is associated with this security node:

K12.EmergencyInfo.Physician

Contact Order						
Line	Call Order	Relationship	Name	Phone Number	Phone Type	Comment

Figure 5-45 Student Screen Emergency Tab

The **Enrollment tab** of the Student screen is associated with two security nodes:

Student

Student Name: School: Homeroom: Teacher:

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

Last Name: _____ First Name: _____ Middle Name: _____ Suffix: _____ Perm ID: _____ Grade: _____ Gender: _____

Figure 5-46 Student Screen Enrollment Tab

Enrollment Information, Enrollment Activity, and Summer Withdrawal are associated with this security node:

K12.EnrollmentInfo.StudentSOREnrollment

The screenshot displays three stacked panels within a window titled "Enrollment Information".

- Enrollment Information:** Contains fields for SAIS ID, Enter Date, Enter Code, Leave Date, Leave Code, and ADA/ADM, each with a corresponding input field and a dropdown menu.
- Enrollment Activity:** Contains fields for Last Activity Date, Effective Date, Grade, Previous Grade, Exit Code, FTE, Tuition Payer Code, District Of Residence, Instructional Setting, Program Code, Special Enrollment Code, Special Program Code, Access 504, Homebound, College Enrolled, Came From, Moved To, Enr User 1, Enr User 2, Enr User 3, Enr User DD 4, Enr User DD 5, Enr User DD 6, and a checkbox for Military Compact Statute.
- Summer Withdrawal:** Contains fields for Summer Withdrawal Code, Summer Withdrawal Date, and Summer Withdrawal Reason Code, each with a corresponding input field and a dropdown menu.

Figure 5-47 Student Screen Enrollment Tab

Other Enrollment Information is associated with this security node:

K12.Student

The screenshot displays a single panel titled "Other Enrollment Information".

- Other Enrollment Information:** Contains fields for Original Enter Date, Original Enter Code, US School Entry Date, US Entry Date, and Entry From Country, each with a corresponding input field and a dropdown menu. Below these fields is a checkbox labeled "Enrolled in US less than three years".

Figure 5-48 Student Screen Enrollment Tab

The **Enrollment History tab** of the Student screen is associated with several nodes:

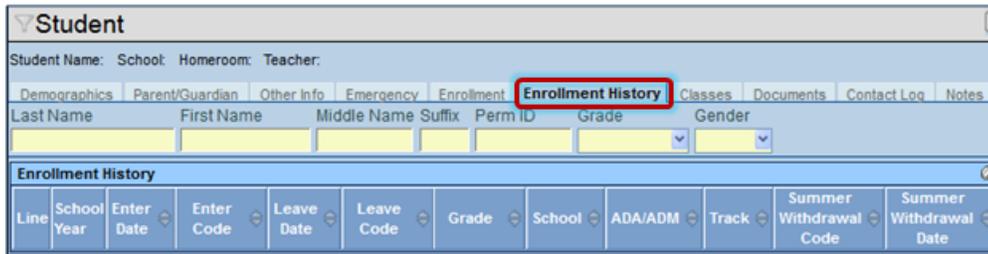


Figure 5-49 Student Sctreen Enrollment History

School Year is associated with this security node:

Revelation.OrganizationInfo.RevYear



Figure 5-50 Student Sctreen Enrollment History

Enter Date, Enter Code, Leave Date, Leave Code, Grade, ADA/ADM, Summer Withdrawal Code and Summer Withdrawal Date is associated with this security node:

K12.EnrollmentInfo.StudentSchoolYear



Figure 5-51 Student Sctreen Enrollment History

School is associated with this security node:

Revelation.OrganizationInfo.RevOrganization

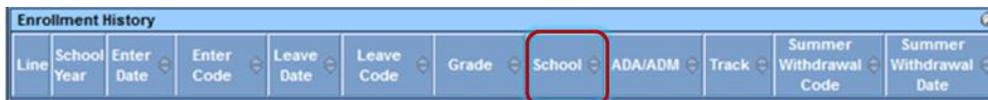


Figure 5-52 Student Sctreen Enrollment History

Track is associated with this security node:

K12.Setup.DistrictTracks

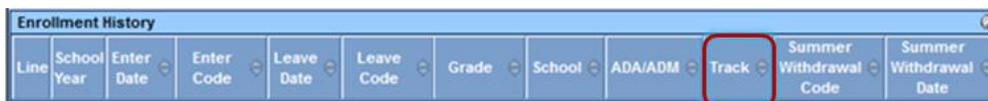


Figure 5-53 Student Sctreen Enrollment History

The detailed screen of the **Enrollment History tab** (the screen that opens when the **Enter Date** or **Enter Code** is clicked) is associated with three security nodes:

The main screen of the **Enrollment tab** is associated with this security node:

K12.EnrollmentInfo.StudentEnrollment

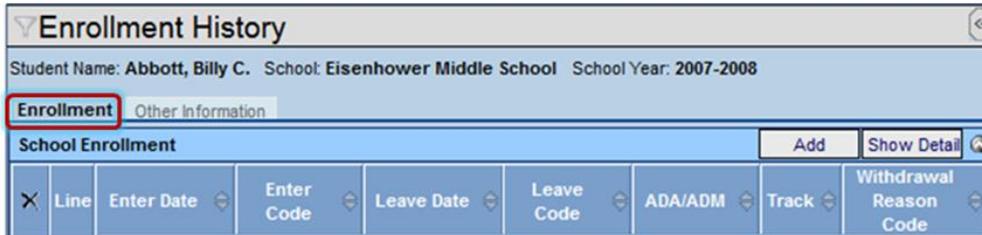


Figure 5-54 Enrollment History Add Screen Enrollment Tab

The detail screen of the **Enrollment tab** is associated with this security node:

K12.EnrollmentInfo.StudentEnrollmentActivity

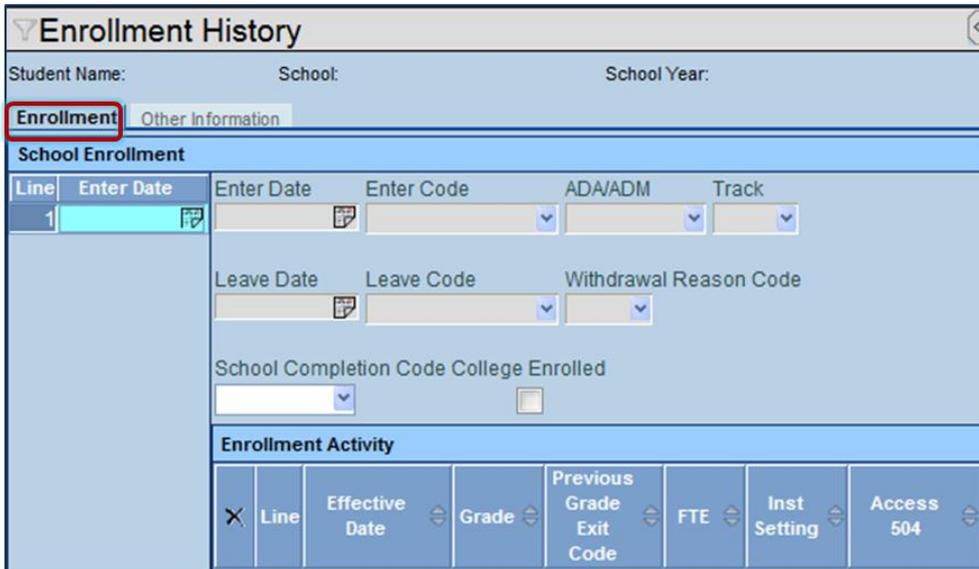


Figure 5-55 Enrollment History Add Screen Enrollment Tab

The **Other Information tab** is associated with this security node:

K12.EnrollmentInfo.StudentSchoolYear

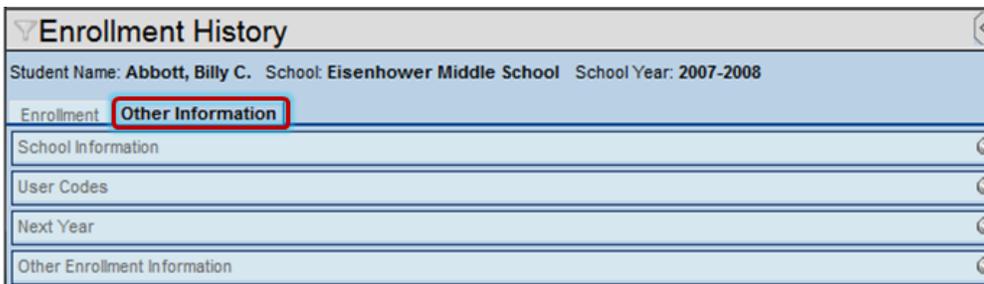


Figure 5-56 Enrollment History Add Screen Other Information Tab

The **Classes tab** of the Student screen is associated with this security node:

K12.ScheduleInfo.StudentClassGrid

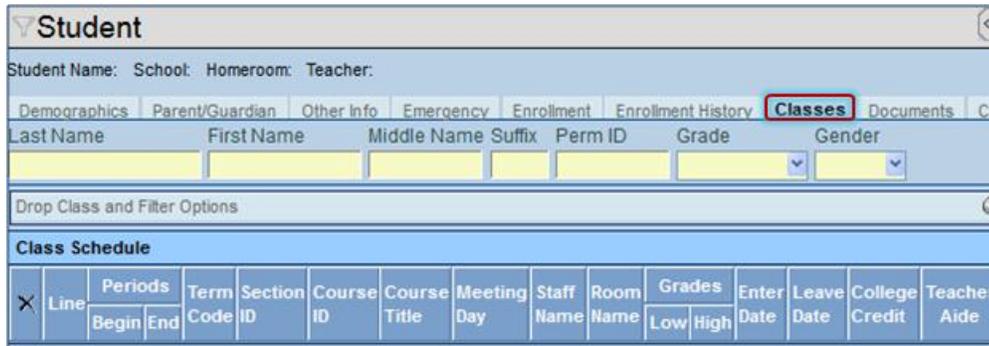


Figure 5-57 Student Screen Classes Tab

The **Documents tab** of the Student screen is associated with this security node:

Revelation.RevPersonAttachDoc

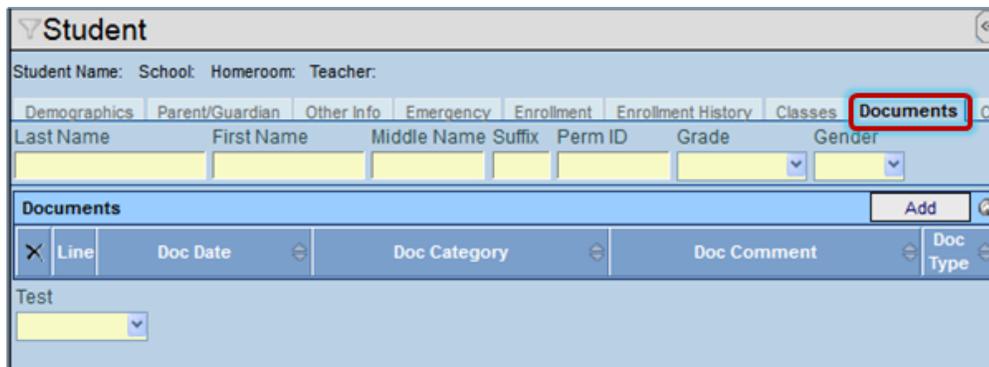


Figure 5-58 Student Screen Documents Tab

The **Student Contact Log tab** of the Student screen is associated with this security node:

Revelation.RevPersonContact

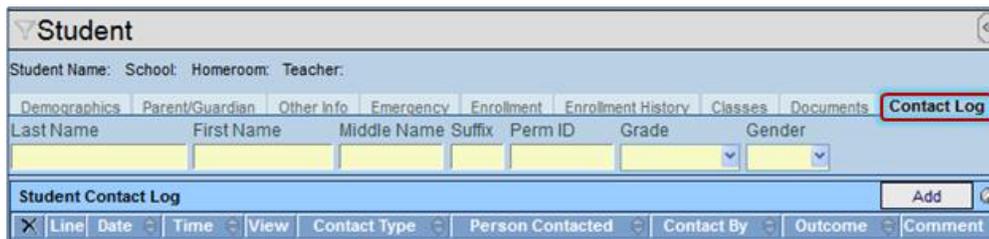


Figure 5-59 Student Screen Contact Log Tab

The **Notes tab** of the Student screen is associated with this security node:

K12.EnrollmentInfo.StudentSchoolYearNotes

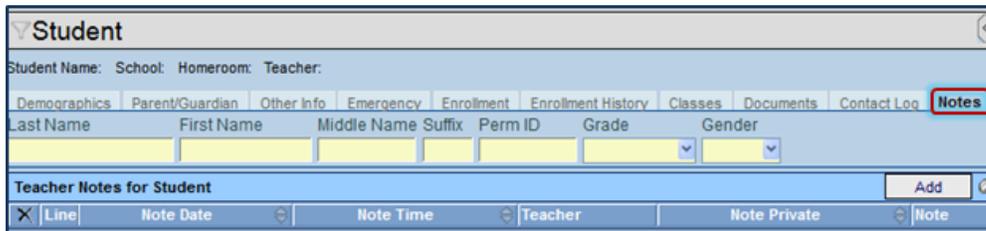


Figure 5-60 Student Screen Notes Tab

STUDENT NOTIFICATIONS SECURITY

The **Student Notification** screen, found under Synergy SIS>Student, is associated with this security node:

Revelation.RevPersonNotification

The screenshot shows a web interface titled "Student Notifications". At the top, there are search filters for "Student Name:", "School:", "Homeroom:", and "Teacher:". Below this is a section labeled "Notifications" with input fields for "Last Name", "First Name", "Middle Name", "Suffix", "Perm ID", and "Grade". The "Grade" field is a dropdown menu. To the right of these fields are "Add" and "Show Detail" buttons. At the bottom, there is a table header with columns: "Line", "Begin Date", "Notification", and "End Date". Each column has a small downward arrow icon next to it.

Figure 5-61 Student Notifications Screen

STUDENT PHONE NUMBERS SECURITY

The **Student Phone Numbers** screen, found under Synergy SIS > Student, is associated with this security node:

K12.StudentPhoneNumber

The screenshot shows a web application interface for 'Student Phone Numbers'. At the top, there is a search bar with a magnifying glass icon and a back arrow. Below the search bar, there are labels for 'Student Name:', 'School:', 'Status:', and 'Room Name:'. Underneath these are input fields for 'Last Name', 'First Name', 'Middle Name', 'Suffix', 'Perm ID', and 'Grade'. The 'Grade' field is a dropdown menu. Below the input fields is a section titled 'Numbers' with an up arrow icon. At the bottom, there is a table header with the following columns: 'Line', 'Relationship', 'Name', 'Phone Number', 'Phone Type', and 'Comment'.

Figure 5-62 Student Phone Numbers Screen

STUDENT TRANSPORTATION SECURITY

The Student Transportation screen is associated with various security nodes:

The screenshot shows a form titled "Student Transportation". At the top, there are fields for "Student Name:", "School:", "Homeroom:", and "Teacher:". Below this is a section titled "Transportation Information" with a sub-header. Underneath, there are input fields for "Last Name", "First Name", "Middle Name", "Suffix", "Perm ID", "Grade" (with a dropdown arrow), and "Gender" (with a dropdown arrow).

Figure 5-63 Student Transportation Screen

Student Address Information, Transportation Requirements, Wheelchair, and Transportation Logistics Information - Primary Phone are associated with this security node:

K12.Student

The screenshot shows three distinct sections of the form, each outlined with a red border. The top section is "Student Address Information" with fields for "Address", "City", "State" (dropdown), "ZIP Code + 4", and "Grid Code", along with a "Map it!" button. The middle section is "Special Transportation Requirements" with a sub-section "Transportation Requirements" containing a "Wheelchair" checkbox. The bottom section is "Transportation Logistics Information" with a "Special Requirements Comment" field and a "Primary Phone" field.

Figure 5-64 Student Transportation Screen

Additional Addresses is associated with this security node:

K12.TransportationInfo.AdditionalTransportationLocation

The screenshot shows a table titled "Additional Addresses" with "Add" and "Show Detail" buttons. The table has columns for "Line", "Type", "Location Type", "School", "Address", "City", "State", "Zip Code", "Transport Time", and "Transportation Days". The "Transportation Days" column contains checkboxes for "Sun", "Mon", "Tue", "Wed", "Thu", "Fri", and "Sat".

Figure 5-65 Student Transportation Screen

School Information, Transportation, Pick Up /Drop Off Information, Transportation Requirements (not Wheelchair) Special Requirements Comment and Transportation Logistics Information (not Primary Phone) are associated with this security node:

K12.EnrollmentInfo.StudentSOREnrollment

The screenshot displays a web-based form for student transportation enrollment, organized into several sections:

- School Information:** Includes fields for School and Staff Name.
- Transportation:** Includes Transport Code (dropdown), Transportation Request Date (calendar), and Transportation Start Date (calendar).
- Pick Up Information:** Includes Transportation Type (dropdown), Bus Route (text), Bus Stop (text), Pick Up Time (calendar), Pick Up Location Type (dropdown), Pick Up School (dropdown), Address (text), City (text), State (dropdown), Zip Code (text), and a Map It! button. It also has a Comment field, Transportation Reason Code (dropdown), Transportation Reason Date (calendar), and Responsible Person (text) with Phone (text).
- Drop Off Information:** Mirrors the Pick Up section with fields for Drop Off Time, Drop Off Location Type, Drop Off School, and Responsible Person.
- Special Transportation Requirements:** Includes a checkbox for Special Transportation Requirements, sub-options for A/C, Ramp, Seat Belts, and Aide, and a checkbox for Leave Unattended (at Pick Up and Drop Off).
- Special Requirements Comment:** A large text area for comments.
- Transportation Logistics Information:** Includes Special Program Teacher (text), School Start Time (text), School Dismiss Time (text), Next School of Attendance (text), and Form Completed By (text).

Figure 5-66 Student Transportation Screen

PARENT SECURITY

The **Demographics** tab in the **Parent** screen, found under Synergy SIS>Parent, is associated with four security nodes:



Figure 5-67 Parent Screen Demographics Tab

Parent Info, Race and Ethnicity, Home Address, Mail Address, and Work Address are associated with this security node:

K12.ParentGuardianInfo

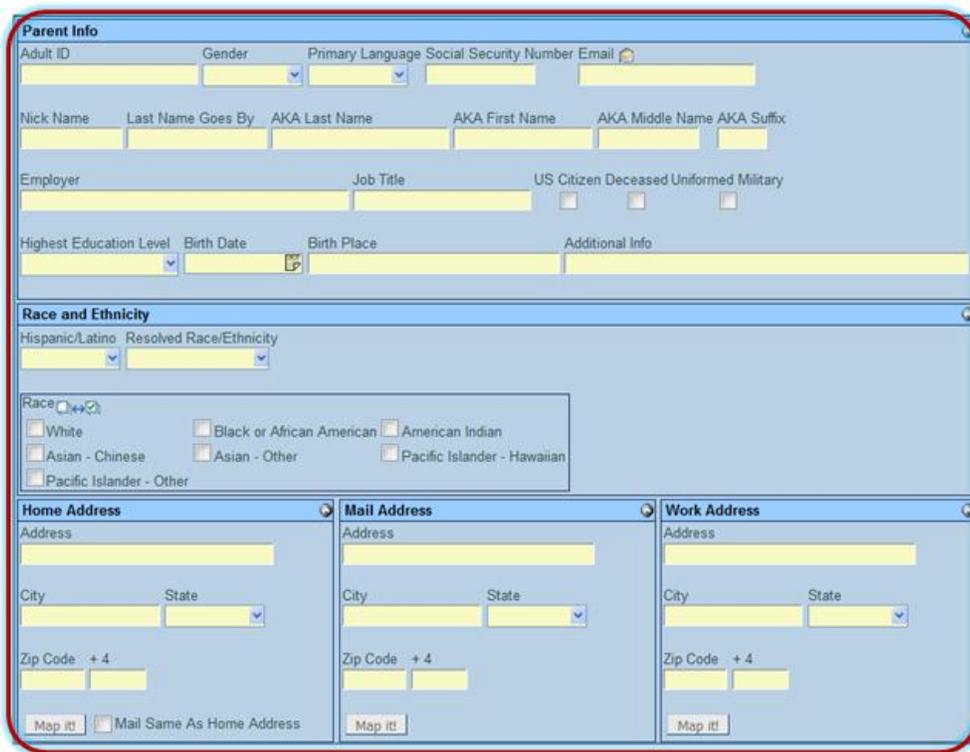


Figure 5-68 Parent Screen Demographics Tab

Phone Numbers is associated with this security node:

Revelation.RevPersonPhone

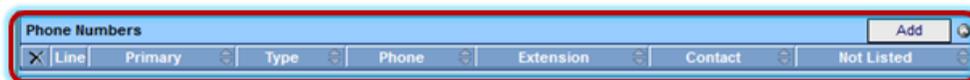


Figure 5-69 Parent Screen Demographics Tab



Caution: The **Revelation.RevPersonPhone** security node is associated with all phone number grids in Synergy SIS for any person (staff, student or parent), not just the parents.

Address History is associated with two security nodes:

Change Date and **Type** are associated with this security node:

Revelation.RevAddressHistory

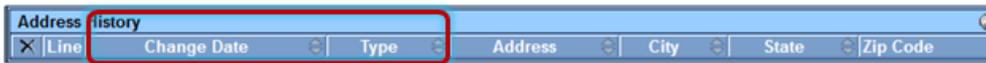


Figure 5-70 Parent Screen Demographics Tab

Address, City, State, and Zip Code are associated with this security node:

Revelation.RevAddress

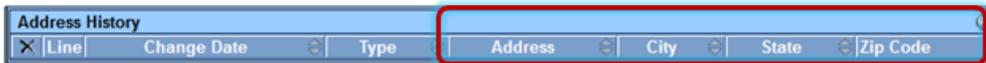


Figure 5-71 Parent Screen Demographics Tab

The **Children** tab of the Parent screen is associated with two security nodes:



Figure 5-72 Parent Screen Children Tab

Student Name is associated with this security node:

K12.Student

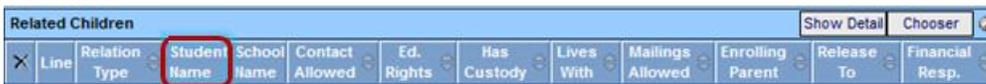


Figure 5-73 Parent Screen Children Tab

The rest of the tab is associated with this security node:

K12.ParentGuardianInfo.ParentStudent



Figure 5-74 Parent Screen Children Tab

The **ParentVUE tab** is associated with three security nodes:



Figure 5-75 Parent Screen ParentVUE Tab

Activation Key Management, Email Addresses, ParentVUE ID, Account Activation, and Notify Options are associated with this security node:

K12.PXP.ParentExperience

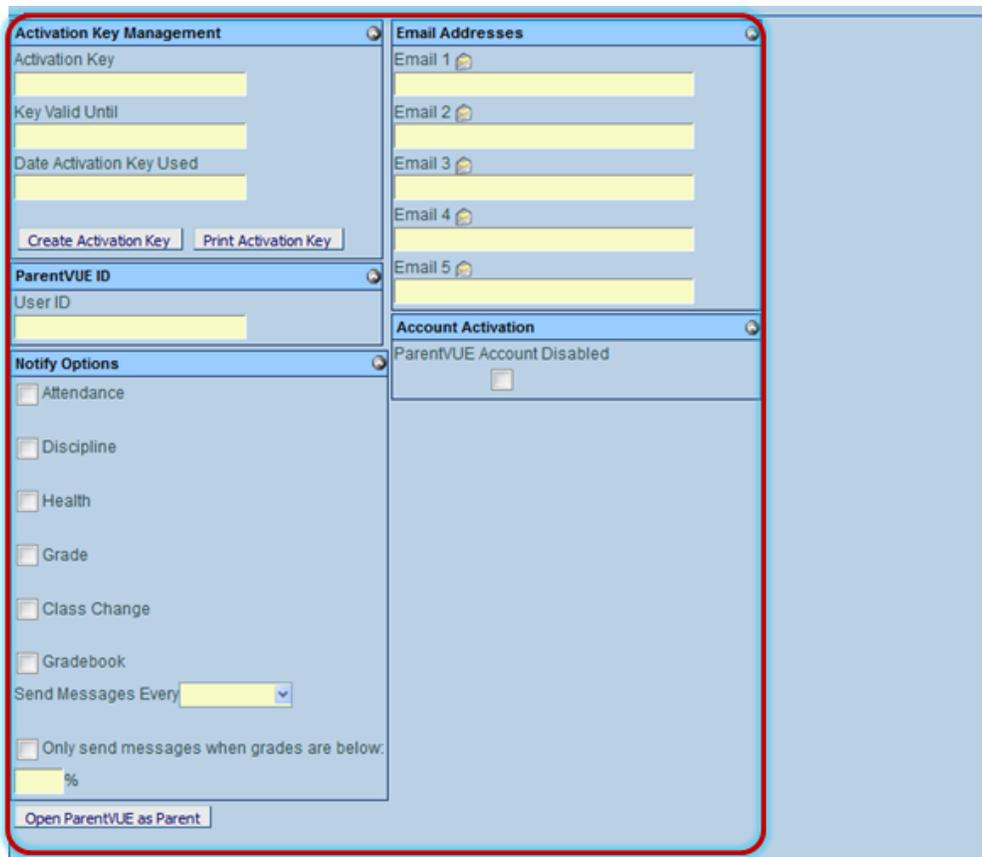


Figure 5-76 Parent Screen ParentVUE Tab

Additional App Type Logins is associated with this security node:

Revelation.RevUserNonSysAddLogin

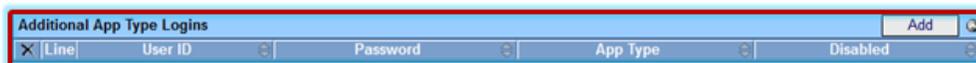
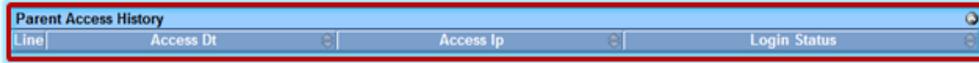


Figure 5-77 Parent Screen ParentVUE Tab

Parent Access History is associated with this security node:

K12.PXP.ParentAccessHistory

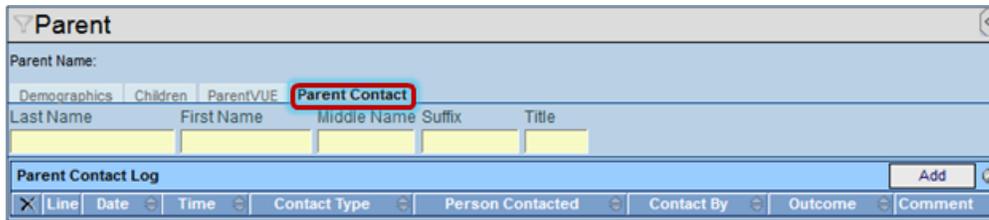


Parent Access History			
Line	Access Dt	Access Ip	Login Status

Figure 5-78 Parent Screen ParentVUE Tab

The **Parent Contact tab** of the Parent screen is associated with this security node:

Revelation.RevPersonContact



Parent

Parent Name:

Demographics Children ParentVUE **Parent Contact**

Last Name First Name Middle Name Suffix Title

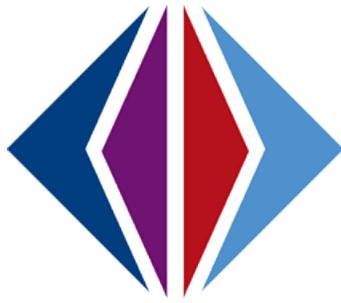
Parent Contact Log Add

Line	Date	Time	Contact Type	Person Contacted	Contact By	Outcome	Comment
------	------	------	--------------	------------------	------------	---------	---------

Figure 5-79 Parent Screen Parent Contact Tab

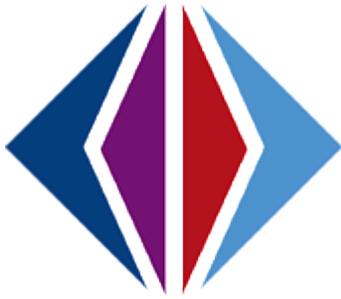
STUDENT REPORTS SECURITY

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



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