

# ***Synergy*** ©

## **Mail Merge 2.0 Guide**



**Edupoint Educational Systems, LLC**

1955 South Val Vista Road, STE 200

Mesa, AZ 85204

Phone (877) 633-7500

Fax (480) 633-7501

### First Edition, September 2013

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

Edupoint's Synergy software and any form of supporting documentation are proprietary and confidential. Unauthorized reproduction or distribution of the software and any form of supporting documentation is strictly prohibited and may result in severe civil and criminal penalties.

Information in this document is provided in connection with Edupoint Educational Systems products. No license to any intellectual property rights is granted by this document.

The illustrations, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

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

Synergy SIS and Synergy SE are trademarks of Edupoint Educational Systems, LLC.

\* Other names and brands may be claimed as the property of others.

Copyright © 2013, Edupoint Educational Systems, LLC. All rights reserved.

## TABLE OF CONTENTS

About This Guide .....	4
<b>CHAPTER ONE: GETTING STARTED .....</b>	<b>5</b>
Introduction to Mail Merge 2.0.....	6
Important Note - Available Reports.....	6
Overview of the Technology.....	8
<b>CHAPTER TWO: MAIL MERGE DOCUMENT EXAMPLES .....</b>	<b>11</b>
Walkthrough of the Process .....	12
Students With No Assigned Lockers .....	12
Parent/Guardian and Health Information .....	17
Behavior Intervention Plan .....	28
<b>CHAPTER THREE: XPATH EXPRESSIONS.....</b>	<b>33</b>
Nodes and Attributes.....	34
Numeric Comparison .....	35
String Comparison .....	36
Absolute and Relative Paths .....	37
<b>CHAPTER FOUR: TIPS AND TRICKS .....</b>	<b>39</b>
Synergy Mail Merge 2.0 .....	40
Mail Merge Document Types and Mail Merge Version .....	40
Mail Merge Version .....	40
Multiple Mail Merge Documents .....	40
Merge 2.0 Advanced Settings (Merge XPath) .....	40
TableStart and TableEnd .....	41
Image Scaling .....	41
Microsoft Word Mail Merge .....	42
How Merge Fields Display.....	42
The \* MERGEFORMAT Switch.....	43
Quickly Insert a Field.....	44
<b>INDEX.....</b>	<b>45</b>
<b>INDEX OF SCREENS .....</b>	<b>47</b>

## ABOUT THIS GUIDE

### Document History

Date	Volume	Edition	Revision	Content
September 2013	1	1	1	Initial release of this document

### Conventions Used in This Guide

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

### Before You Begin

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

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

# Chapter One: GETTING STARTED

In this chapter, the following topics are covered:

- Introduction to Mail Merge 2.0
- Overview of the Technology

# INTRODUCTION TO MAIL MERGE 2.0

## Important Note - Available Reports

The reports available for this feature are the Synergy SIS reports that display in the SIS PAD Tree. In order to use the Mail Merge 2.0 features, the report must be available in XML format. The Synergy SIS reports described above are available but the Synergy SE reports must be provided by Edupoint to your system administrator. Synergy SE reports that display on the PAD Security screen under Synergy SE >Non PAD>NTL >Documents >Reports for which the core template has been developed by Edupoint. The SE IEP is available, also.

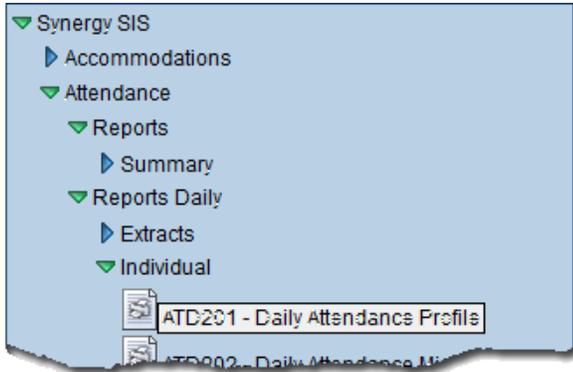


Figure 1-1 Synergy SIS Reports

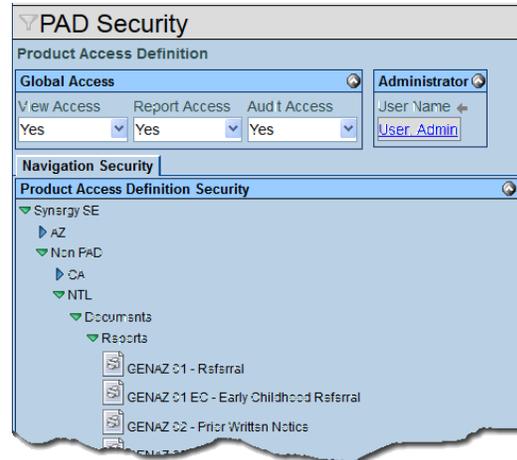


Figure 1-2 Synergy SE Reports

Synergy Mail Merge 2.0 enables printing the report XML content, in a custom format. For example, the first picture below is an example of the HLT201 - Student Health Profile. The second picture is an example of a customized HLT201 - Student Health Profile that presents the same information in a different format.

Student Information				
Student Name <b>Aaron, Ian</b>	Perm ID <b>129442</b>			
Gender <b>M</b>	Grade <b>04</b>			
Last Name Goes By <b>Aaron, Ian</b>	Address <b>1955 S Val Vista Dr Mesa, AZ 85234</b>			
Nick Name <b>Junior</b>	Birth Date <b>04/11/2003</b>			
Phone <b>480-555-1214</b>	Home Language <b>English</b>			
Resolved Race/Ethnicity <b>Hispanic</b>	Enter Date <b>08/28/2012</b>			
Leave Date				
IN CASE OF EMERGENCY: Names of persons who can assume temporary responsibility				
Name <b>Chris Johnson</b>	Relationship <b>Aunt</b>	Home Phone <b>480-555-7788</b>	Work Phone <b>602-555-1234 512</b>	Other Phone <b>949-558-9073</b>
Name <b>Christina Acosta</b>	Relationship <b>Neighbor</b>	Home Phone <b>480-555-1212</b>	Work Phone	Other Phone
Physician <b>Dr Paul Scholtz</b>	Phone <b>949-555-3434</b>			
Health Conditions				
Condition Code	Start Date			

Figure 1-3 HLT201

Edupoint School Services		Student Health Profile			Adams Elementary	
Name	Perm ID	Gender	Grade	Birth Date		
Aaron, Ian	129442	M	04	04/11/2003		
<b>EMERGENCY CONTACTS:</b>						
Name	Relationship	Home Phone	Work Phone	Other Phone		
Chris Johnson	Aunt	480-555-7788	602-555-1234512	949-558-9073		
Name	Relationship	Home Phone	Work Phone	Other Phone		
Christina Acosta	Neighbor	480-555-1212				
Physician	Phone					
Dr Paul Scholtz	949-555-3434					
<b>HEALTH CONDITIONS:</b>						
Student has a heart murmur.						
Student has periodic asthma attacks that are treated with an inhaler.						

Figure 1-4 Customized Example HLT201

**NOTE:** Only data fields contained in the original report XML file can be used on the custom report.

Mail merge versions of these reports, in customized formats, may be created. Each one containing some or all of the data found in the original. This includes queries saved as reports. For information about saving a report from a query, see *Synergy SIS Query & Reporting Guide*.

The process of customizing a report consists of these main steps:

**Step One:** *Construct a MS Word document using the desired XML fields to include in the replacement report.*

**Step Two:** *Upload the merge document to Mail Merge Definition.*

**Step Three:** *Replace the standard report with the merge document in Pad Security.*

For information about creating merge documents in Microsoft Word, search for "merge field" in the online help for Word.

For information about XPath, see: [w3schools.com](http://w3schools.com).

## OVERVIEW OF THE TECHNOLOGY

Synergy Mail Merge 2.0 uses

- The mail merge functionality of Microsoft Word
- XPath, the XML Path Language for identifying nodes in an XML document

A common use of Word mail merge is printing a form letter. The Word document contains codes that identify the data that the merge function inserts. Example:

```
{ MERGEFIELD CourtesyTitle } { MERGEFIELD LastName }
```

This line in a merge document might be replaced, during the merge function, with data as follows:

Dear Ms. Jones,

Dear Mr. Smith,

Dear Dr. Brown,

With Synergy Mail Merge 2.0, the data source is Synergy's SQL or Oracle databases, and the codes that identify the data to merge are XPath expressions.

The following is an XML representation of parts of student records in the database.

```
<?xml version="1.0"?>
- <REV_REPORT>
+ <REV_HEADER>
  <PARAMETER_GROUP/>
+ <REV_DATA_DEF>
- <REV_DATA_ROOT>
  <REV_DATE>03/04/2013</REV_DATE>
  <REV_TIME>1:12 PM</REV_TIME>
  <Student Grade-Code="200" Grade="10" Gender-Code="F" Gender="Female" SisNumber="902870" FormattedName="Abernethy, Anne E."/>
  <Student Grade-Code="200" Grade="10" Gender-Code="F" Gender="Female" SisNumber="901830" FormattedName="Acevedo, Ashley"/>
  <Student Grade-Code="200" Grade="10" Gender-Code="M" Gender="Male" SisNumber="110412" FormattedName="Acunia, Kenneth O."/>
  <Student Grade-Code="200" Grade="10" Gender-Code="F" Gender="Female" SisNumber="903912" FormattedName="Adair, Diane N."/>
  <Student Grade-Code="200" Grade="10" Gender-Code="M" Gender="Male" SisNumber="901622" FormattedName="Adams, Stephen J."/>
```

Figure 1-5 XML Output Displayed In Internet Explorer

XML documents have a tree structure with parent and child elements. Clicking plus signs (+) and minus signs (-) expands and collapses the structure. The XML tree is where you can identify the names, and locations in of the fields to include in a custom report.

In this example, the branch <REV\_REPORT><REV\_DATA\_ROOT> contains multiple Student nodes, and each of these nodes has the attributes Grade-Code, Grade, Gender-Code, Gender, SisNumber, and FormattedName.

The following XPath expression references the formatted name:

```
REV_REPORT/REV_DATA_ROOT/Student@FormattedName
```

In general, to extract data from the database, you need matching TableStart and TableEnd merge fields. (These are related to database tables and not table formatting in Word.) The following merge fields instruct Mail Merge 2.0 to loop through Student records and print the FormattedName from each:

```
{ MERGEFIELD TableStart: REV_REPORT/REV_DATA_ROOT/Student }
```

```
{ MERGEFIELD @FormattedName }
```

```
{ MERGEFIELD TableEnd: REV_REPORT/REV_DATA_ROOT/Student }
```

The following chapter shows this in context.

For information about creating merge documents in Microsoft Word, search for "merge field" in the online help for Word. For information about XPath, see: [w3schools.com XPath Tutorial](http://w3schools.com/XPath/Tutorial).



# Chapter Two: MAIL MERGE DOCUMENT EXAMPLES

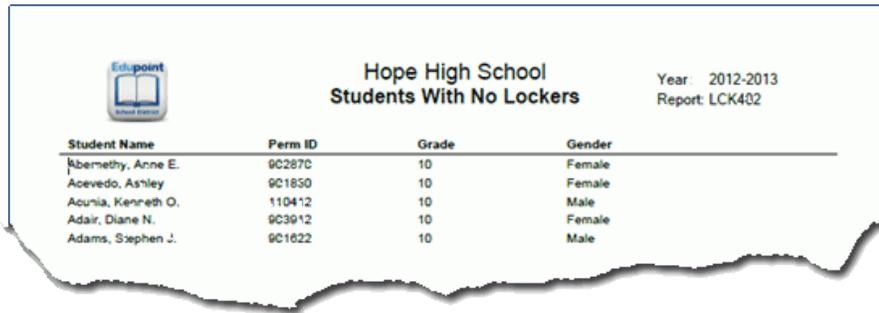
In this chapter, the following topics are covered:

- Walkthrough of the Process
  - ❖ Students With No Assigned Lockers
  - ❖ Parent/Guardian and Health Information
  - ❖ Behavior Intervention Plan

# WALKTHROUGH OF THE PROCESS

## Students With No Assigned Lockers

LCK402 - Students With No Lockers is a very simple report, using Mail Merge 2.0, it can be made even simpler. LCK402 looks like this:

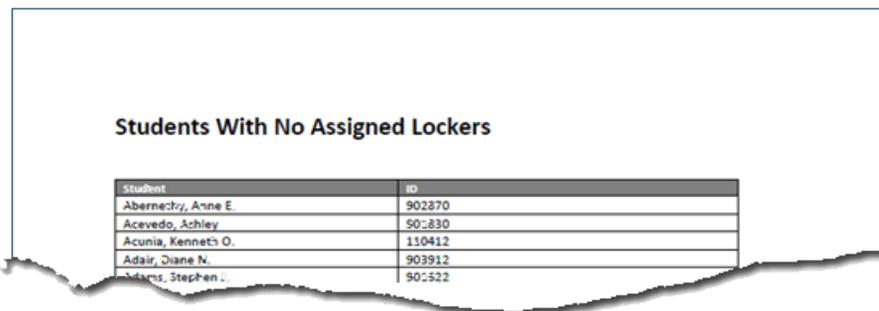


The screenshot shows a report titled "Hope High School Students With No Lockers" for the year 2012-2013. It includes the Edupoint logo and a table with the following data:

Student Name	Perm ID	Grade	Gender
Abernethy, Anne E.	9C287C	10	Female
Acevedo, Ashley	9C1850	10	Female
Acuria, Kenneth O.	110412	10	Male
Adair, Diane N.	9C3912	10	Female
Adams, Stephen J.	9C1822	10	Male

Figure 2-1 LCK402 - Students With No Lockers

The desired custom report contains a subset of the original information, Student Name and ID. It looks like this:



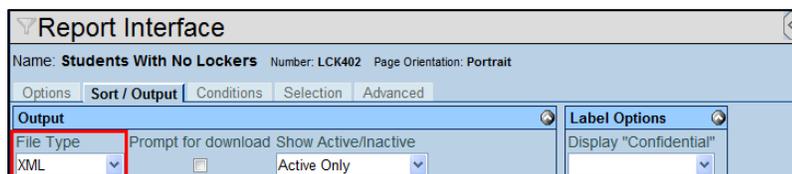
The screenshot shows a custom report titled "Students With No Assigned Lockers" with a table containing the following data:

Student	ID
Abernethy, Anne E.	902370
Acevedo, Ashley	90:830
Acuria, Kenneth O.	110412
Adair, Diane N.	903912
Adams, Stephen J.	90:522

Figure 2-2 Custom LCK402 - Students With No Lockers Example

**Step One:** Construct a MS Word document using the desired XML fields to include in the replacement report.

1. Go to the **LCK402 Report Interface Sort /Output tab**.
2. Click **File Type** drop-down and select **XML** for the report.
3. Click **Print**. The report is displayed as the XML shown in [Figure 1-5](#).



The screenshot shows the "Report Interface" window with the "Sort / Output" tab selected. The "File Type" dropdown menu is open and set to "XML". Other options include "Prompt for download", "Show Active/Inactive", and "Label Options".

Figure 2-3 Report Interface Sort /Output Tab

4. Build the custom report format in MS Word.

- Create the custom report's structure, or template with everything that will not come from the Synergy database.
- Then, to merge data from the Synergy database, insert merge fields: on the **Insert** tab, click **Quick Parts** and then **Field**.

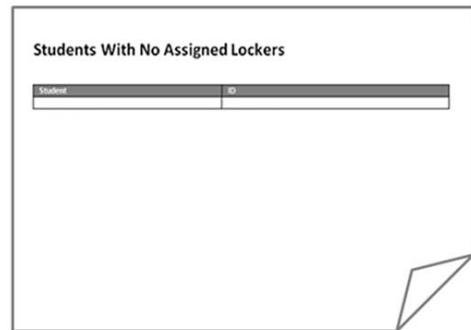


Figure 2-4 MS Word Custom Report

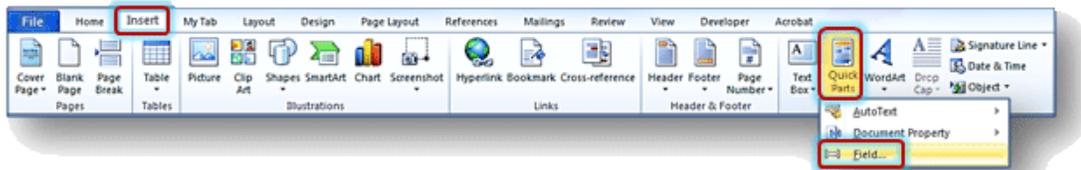


Figure 2-5 MS Word Ribbon

- Under **Categories:** select **Mail Merge**.

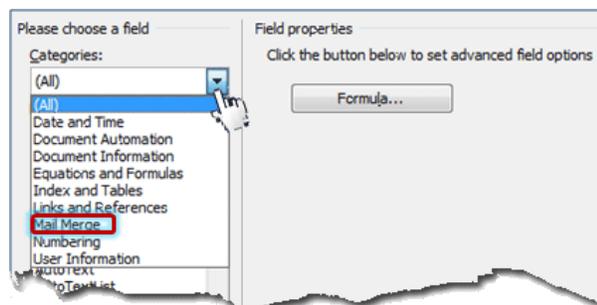


Figure 2-6 MS Word Insert Field Selection

- Then under **Field names:** click **MergeField**.

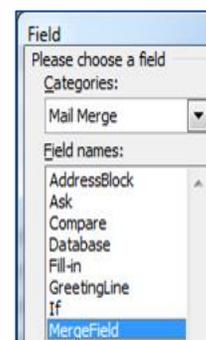


Figure 2-7 MS Word Field Selection

- In **Field name**, type the XPath expression for the desired data.

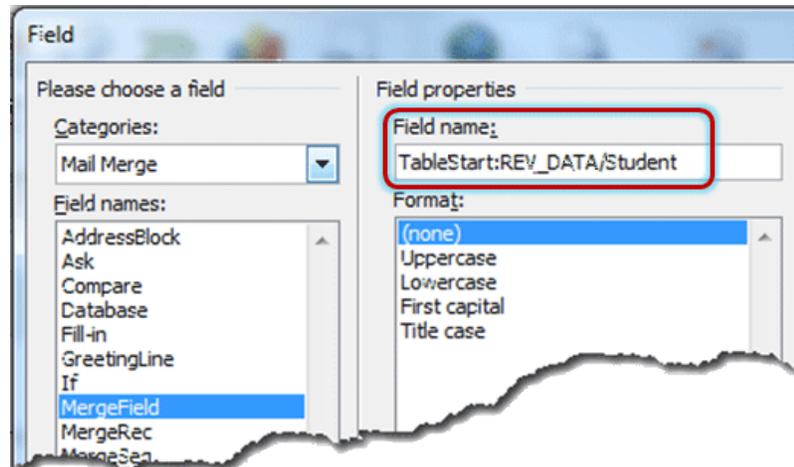


Figure 2-8 MS Word Field Selection

- Each XPath expression relies on the XML shown in [Figure 1-5](#). For our report, we need four (4) merge fields.
- To loop through Student records, we need a (1) TableStart and a (2) TableEnd for REV\_DATA\_ROOT/Student.

**NOTE:** We could also reference this as REV\_REPORT/REV\_DATA\_ROOT/Student, but because it is the top node in the XML, REV\_REPORT is not necessary.

- We want both (3) SisNumber and (4) FormattedName. That is two more merge fields, for a total of four.

In example below, the four merge fields are identified in the completed Word document.

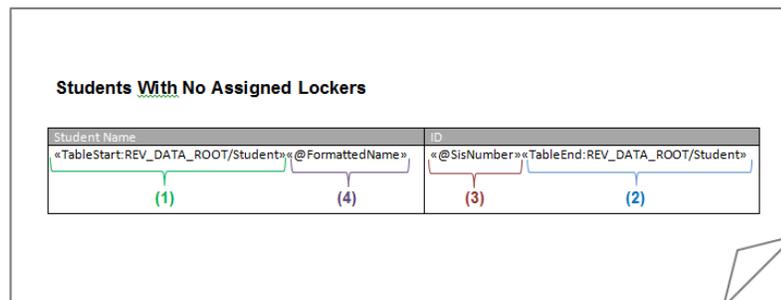


Figure 2-9 Merge Fields Example Word Document

**Step Two:** *Upload the merge document to Mail Merge Definition.*

1. Navigate to **Synergy SIS>System>Setup>Mail Merge District Definition or Mail Merge Definition screen**. A Mail Merge Definition is at the school level and overrides a Mail Merge District Definition. For more about this, see: [Multiple Mail Merge Documents](#).
2. Click **Add** at the top of the screen. A new screen opens.
3. Complete as follows:

Name	Type	Default Language	Report Name	Mail Merge Version
No Locker - Simple	Labels	English	LCK402 - StudentsWithNoLockers	2.0

Figure 2-10 Mail Merge District Definition Screen

- **Name** – Descriptive, recognizable name for the substitute report.
  - **Type** – Select **Labels** for a list report. Select **General** if you want to output a page for each student. For details about using Labels and General, see [Mail Merge Document Types](#).
  - **Language** – Language of the custom report you are uploading. You can upload different Word files for different languages.
  - **Report Name** – Original report for which you are uploading an alternative.
  - Mail Merge Version – Select 2.0.
  - Click **Save**.
4. Click **Add** on the Mail Merge Documents bar.

Name	Type	Default Language	Report Name	Mail Merge Version
No Locker - Simple	Labels	English	LCK402 - StudentsWithNoLockers	2.0

Line	Language	Revision	Document	Add Date Time Stamp

Figure 2-11 Mail Merge District Definition Screen

5. Browse to and select the Word merge document, and click **Upload**.

Attach document

Steps To Upload Image:

- 1) Click Browse and select the file you wish to upload
- 2) Click Upload

No Locker merge file.docx

Figure 2-12 Attach Document Screen

6. Select **English** as the **Language**, and click **Save**. The document is now available to substitute for LCK402.

Name	Type	Default Language	Report Name	Mail Merge Version
No Locker - Simple	Labels	English	LCK402 - StudentsWithNoLockers	2.0

Line	Language	Revision	Document	Add Date Time Stamp
1	English		[Word icon]	03/05/2013 11:15:00

Figure 2-13 Mail Merge District Definition Screen

**Step Three:** *Replace the standard report with the merge document in Pad Security.*

Navigate to **Synergy SIS>System>Security>PAD Security**.

1. Select the report that you are replacing.

The screenshot shows the 'PAD Security' interface. Under 'Product Access Definition Security', a tree view on the left lists various categories, with 'Reports' expanded to show 'LCK402 - Students With No Lockers' selected. The main panel displays configuration for 'Name: K12.LockerInfo.Reports.StudentsWithNoLockers'. The 'Report Substitution' dropdown is empty, and the 'Quick Launch Text' dropdown is set to 'District Mail Merge'. Below this is a 'Group Access' table.

Line	User Group Name	Access
1	Public	
2	Admin Hope High	
3	Curriculum Directors	
4	Dual Login	
5	Report Card Specialist - Art	
6	Report Card Specialist - PE	
7	Role - Admin	
8	Role - Assistant Principal	
9	Role - Attendance Daily	

Figure 2-14 PAD Security Screen

2. Select your Word document from the **District Mail Merge** drop-down.
3. Make sure that **Report Substitution** is blank.
4. Click **Save**. When you run LCK402, the result will be a report based on your merge document.

### Parent/Guardian and Health Information

The Student Profile report, STU201, includes a student's ethnicity, bus route, health conditions, emergency contacts, and other information. For this example, a simplified version was created for parents and guardians to confirm a subset of this information about their students.

The first page of STU201 looks like the following.

		<b>Adams Elementary Student Profile</b>		Year: 2012-2013 Report: STU201	
Aaron, Ian -- Homeroom: 0002					
<b>General Information</b>					
Student Name <b>Aaron, Ian</b>		Perm ID <b>129442</b>	Gender <b>M</b>	Grade <b>04</b>	
State ID <b>0010685150</b>		Last Name Goes By		Nick Name <b>Junior</b>	
Birth Date <b>04/11/2003</b>	Birth Place <b>Brea</b>		Leave Date	Enter Date <b>08/28/2012</b>	
Home Phone <b>480-555-1214</b>	Home Language <b>English</b>		Resolved Race/Ethnicity <b>Hispanic</b>		
Home Address <b>1955 S Val Vista Dr Mesa, AZ 85234</b>			Mailing Address <b>1955 S Val Vista Dr Mesa, AZ 85234</b>		
Bus Routes:		AM Bus: <b>1005</b>	AM K bus to home:	PM K bus to school:	Day Care:
PM Bus: <b>1005</b>					
					
<b>Custodial Information</b>					
Step-Father <b>Jones, Jonathon</b>		Employer	<input type="checkbox"/> Lives With	<input checked="" type="checkbox"/> Contact Allowed	<input checked="" type="checkbox"/> Mailings Allowed
Address:			<input type="checkbox"/> Has Custody	<input type="checkbox"/> Ed. Rights	
E-Mail:					
Mother <b>Aaron, Kathleen</b>		Employer	<input checked="" type="checkbox"/> Lives With	<input checked="" type="checkbox"/> Contact Allowed	<input checked="" type="checkbox"/> Mailings Allowed
Address: <b>1955 S Val Vista Dr Mesa, AZ 85234</b>			<input checked="" type="checkbox"/> Has Custody	<input checked="" type="checkbox"/> Ed. Rights	
E-Mail: <b>jberg@edupoint.com</b>					
Phone Type: <b>Cell</b>	Phone: <b>###-###-####</b>	Extension:	<input type="checkbox"/> Primary	<input checked="" type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: <b>Home</b>	Phone: <b>###-###-####</b>	Extension:	<input checked="" type="checkbox"/> Primary	<input checked="" type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Father <b>Aaron, Phillip</b>		Employer	<input checked="" type="checkbox"/> Lives With	<input checked="" type="checkbox"/> Contact Allowed	<input checked="" type="checkbox"/> Mailings Allowed
Address: <b>1955 S Val Vista Dr Mesa, AZ 85234</b>			<input checked="" type="checkbox"/> Has Custody	<input checked="" type="checkbox"/> Ed. Rights	
E-Mail:					
Phone Type: <b>Home</b>	Phone: <b>480-555-1214</b>	Extension:	<input type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: <b>Work</b>	Phone: <b>602-333-4874</b>	Extension:	<input type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
Phone Type: <b>Cell</b>	Phone: <b>480-555-6767</b>	Extension:	<input checked="" type="checkbox"/> Primary	<input type="checkbox"/> Not Listed	<input type="checkbox"/> Contact Phone
<b>Health Conditions</b>					
Condition <b>Heart</b>				Start Date	
Comment <b>Student has a heart murmur.</b>					
Condition <b>Asthma</b>				Start Date	
<p>Printed by Admin User at 06/07/2013 11:19 AM      Edupoint School District      Page 1 of 2</p>					

Figure 2-15 STU201 - Student Profile Report

The new report looks like the following.

**Confirmation of  
Parent/Guardian and Health Information**

Student:  
Aaron, Ian  
1955 S Val Vista Dr  
Mesa, AZ 85234

Dear Parent/Guardian,

Please validate or correct the information below and return this form with your signature.

**Parent/Guardian Information:**

Name: Jones, Jonathon <input checked="" type="checkbox"/> Contact Allowed <input type="checkbox"/> Has Custody
Name: Aaron, Kathleen <input checked="" type="checkbox"/> Contact Allowed <input checked="" type="checkbox"/> Has Custody
Name: Aaron, Phillip <input checked="" type="checkbox"/> Contact Allowed <input checked="" type="checkbox"/> Has Custody

**Health Conditions**

Student has a heart murmur.
Student has periodic asthma attacks that are treated with an inhaler.

---

Parent/Guardian Signature

Figure 2-16 Confirmation of Parent/Guardian and Health Information Report

Following the same steps as the [Students With No Assigned Lockers](#):

**Step One:** Construct a MS Word document using the desired XML fields to include in the replacement report.

1. Go to the **STU201 Report Interface Sort /Output** tab.
2. Click **File Type** drop-down and select **XML** for the report.

3. Click **Print**. The report is displayed in XML.
4. Build the custom report format in MS Word.

Figure 2-17 MS Word Custom Report

- In the XML, find the fields to use in the custom report.

REV\_REPORT is the top-level node. One of its child nodes is REV\_DATA\_ROOT, and one of that node's child nodes is Student. In XML, each node is enclosed in angle brackets, like <REV\_REPORT>, <REV\_DATA\_ROOT>, and <Student>. In the figure below, note the location of the bracket that ends the Student node.

```

<?xml version="1.0"?>
- <REV_REPORT>
+ <REV_HEADER>
  <PARAMETER_GROUP/>
+ <REV_DATA_DEF>
- <REV_DATA_ROOT>
  <REV_DATE>06/07/2013</REV_DATE>
  <REV_TIME>11:15 AM</REV_TIME>
- <Student OrganizationName="Adams Elementary" AttendPermitCode="" AttendPermitCode="" MailCityStateZip="Mesa,
AZ 85234" HomeCityStateZip="Mesa, AZ 85234" LeaveDate="" StateStudentNumber="0010685150"
SpecialEdScreeningDate="09/15/2010" Suffix="" BirthVerification-Code="" BirthVerification="" EnterDate="08/28/2012"
HomeRoomTeacherName="Carroll, Natalie" HomeRoomName="0002" PhysicianPhoneExtn="" PhysicianPhone="949-555-
3434" PhysicianName="Dr Paul Scholtz" PhotoFileName="C:\Program Files\Edupoint\RT Process
Service\Photos\B6\B6763DCF-FBB8-4445-BAEE-170A7D9D1C5F_1798274602_Photo.PNG" StudentName="Aaron,
Ian" BusRouteToSchool="1005" BusRouteFromSchool="1005" HomeLanguage-Code="00" HomeLanguage="English"
EthnicCode-Code="__HIS" EthnicCode="Hispanic" BirthPlace="Brea" BirthState-Code="CA" BirthState="California"
MailZipCode="85234" MailState-Code="AZ" MailState="AZ" MailCity="Mesa" MailAddress="1955 S Val Vista Dr"
HomeZipCode="85234" HomeState-Code="AZ" HomeState="AZ" HomeCity="Mesa" HomeAddress="1955 S Val Vista Dr"
PrimaryPhone="480-555-1214" NickName="Junior" LastNameGoesBy="" Grade-Code="140" Grade="04" Gender-Code="M"
Gender="M" BirthDate="04/11/2003" MiddleName="" LastName="Aaron" FirstName="Ian" SisNumber="129442"
StudentGU="B6763DCF-FBB8-4445-BAEE-170A7D9D1C5F" >

```

Figure 2-18 STU201 - Student Profile Report XML Format

The first block of information needed for our report is the student's name and mailing address. This data is in the Student node.

```
<Student OrganizationName="Adams Elementary" AttendPermitCode-Code="" AttendPermitCode="" MailCityStateZip="Mesa,
AZ 85234" HomeCityStateZip="Mesa, AZ 85234" LeaveDate="" StateStudentNumber="0010685150"
SpecialEdScreeningDate="09/15/2010" Suffix="" BirthVerification-Code="" BirthVerification="" EnterDate="08/28/2012"
HomeRoomTeacherName="Carroll, Natalie" HomeRoomName="0002" PhysicianPhoneExtn="" PhysicianPhone="949-555-
3434" PhysicianName="Dr Paul Scholtz" PhotoFileName="C:\Program Files\Edupoint\RT Process
Service\Photos/B6/B6763DCF-FBB8-4445-BAEE-170A7D9D1C5F_1798274602_Photo.PNG" StudentName="Aaron,
Ian" BusRouteToSchool="1005" BusRouteFromSchool="1005" HomeLanguage-Code="00" HomeLanguage="English"
EthnicCode-Code="__HIS" EthnicCode="Hispanic" BirthPlace="Brea" BirthState-Code="CA" BirthState="California"
MailZipCode="85234" MailState-Code="AZ" MailState="AZ" MailCity="Mesa" MailAddress="1955 S Val Vista Dr"
HomeZipCode="85234" HomeState-Code="AZ" HomeState="AZ" HomeCity="Mesa" HomeAddress="1955 S Val Vista Dr"
PrimaryPhone="480-555-1214" NickName="Junior" LastNameGoesBy="" Grade-Code="140" Grade="04" Gender-Code="M"
Gender="M" BirthDate="04/11/2003" MiddleName="" LastName="Aaron" FirstName="Ian" SisNumber="129442"
StudentGU="B6763DCF-FBB8-4445-BAEE-170A7D9D1C5F">
```

Figure 2-19 STU201 - Student Profile Report XML Format

The next block of information needed for our report is the name of each parent/guardian and whether this person has custody and is allowed contact. StudentParent is a child node of Student and contains this data. There can be more than one StudentParent node per Student node.

```
<StudentParent ParentEmail="" ParentCityStateZip="" ParentAddress="" ParentName="Jones, Jonathon" Employer=""
ParentGender-Code="" ParentGender="" ParentLastName="Jones" ParentFirstName="Jonathon" RelationType-
Code="SF" RelationType="Step-Father" EducationalRights-Code="N" EducationalRights="false" MailingsAllowed-
Code="Y" MailingsAllowed="true" LivesWith-Code="N" LivesWith="false" HasCustody-Code="N" HasCustody="false"
ContactAllowed-Code="Y" ContactAllowed="true"/>
```

Figure 2-20 STU201 - Student Profile Report XML Format

The final block of information needed for our report is a list of the student's health conditions. HealthConditions is a child node of Student and contains this data. There can be more than one HealthConditions node per Student node.

In the skeletal Word document,

- Place the cursor where the student's name and mailing address should go.
- Then, to merge data from the Synergy database, insert merge fields: on the **Insert** tab, click **Quick Parts** and then **Field**.
- Under **Categories:** select **Mail Merge**.
- Then under **Field names:** click **Mergefield**.
- In **Field name**, type the XPath expression:

TableStart:REV\_DATA\_ROOT/Student

This is an instruction to retrieve data from REV\_DATA\_ROOT/Student and to loop through other merge fields until the **TableEnd:REV\_DATA\_ROOT/Student** instruction is encountered.

- Make sure **Preserve formatting during updates** is checked.

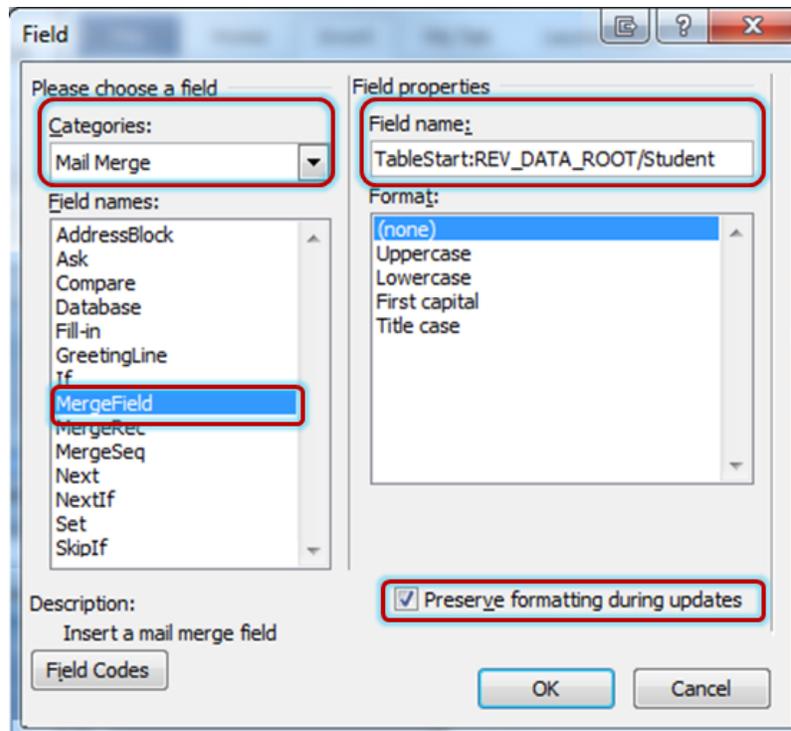


Figure 2-21 MS Word Field Selection

- Click **OK**.
5. Repeat step 5 using each of the following as the text in **Field name**:. Make sure to move your cursor on the Word document when necessary to place the fields appropriately and to include appropriate punctuation. For example, include a comma between the student's last and first names, and place the name and street address on separate lines.
- In the address block:

@LastName

@FirstName

@MailAddress

@MailCity

@MailState

@MailZipCode

So far, the Word document should look like this:



Figure 2-22 XML Field Selection for Example Report

- In the Parent/Guardian Information box:

```
TableStart:StudentParent
```

This is an instruction to retrieve data from REV\_DATA\_ROOT/Student/StudentParent and to loop through other merge fields until the TableEnd:StudentParent instruction is encountered.

**NOTE:** The full path REV\_DATA\_ROOT/Student/StudentParent is not used here because this field is nested within the scope of TableStart:REV\_DATA\_ROOT/Student.

```
@ParentName
```

- If you like, apply bold formatting after inserting the merge field, so the parent/guardian prints bold.

Now the document looks like this.

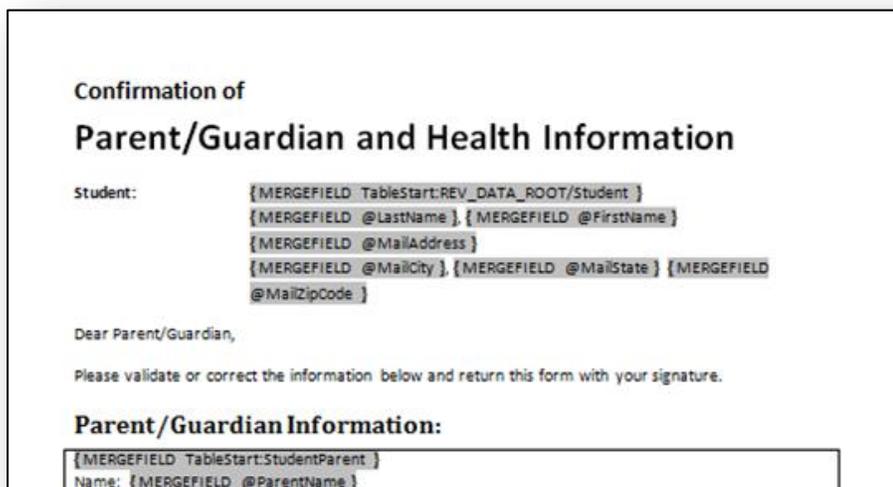


Figure 2-23 XML Field Selection for Example Report

6. To print a selected check box, if the parent/guardian is/is not allowed contact with the student, create a merge field within a merge field.

- Repeat steps 5 but leave the **Field name:** blank.
- Make sure that the merge field looks like the following.

```
{ MERGEFIELD \* MERGEFORMAT }
```

- In the merge field, replace the text **MERGEFIELD \\* MERGEFORMAT** with the word **IF**.

```
{ IF }
```

- With your cursor after IF, insert another merge field, and in **Field name:** type **@ContactAllowed**. This creates the merge field within a merge field.

```
{ IF { MERGEFIELD @ContactAllowed \* MERGEFORMAT } }
```

- From the interior merge field, delete **\\* MERGEFORMAT**.

```
{ IF { MERGEFIELD @ContactAllowed } }
```

- After the interior merge field, type **= "true"**. This tests whether the **ContactAllowed** attribute of the parent/guardian is true.

```
{ IF { MERGEFIELD @ContactAllowed}="true" }
```

- After **= "true"**, add instructions for what to print if **ContactAllowed** is true and if it is not true.

```
{ IF { MERGEFIELD @ContactAllowed}="true" "☑ Contact Allowed " "•  
Contact Allowed" }
```

There are many ways to insert check boxes and other symbols. Here, we insert them by changing the font to Wingdings, turning on Num Lock, holding down the Alt key, and on the numeric keypad, pressing 0254 for ☑ and 0168 for ☐.

- To print a selected check box, if the parent/guardian has custody, repeat step 7 or copy and paste the results from step 7 then change the text **@ContactAllowed** for **@HasCustody** where it displays.
- End the loop through a student record for instances of **StudentParent** by inserting another merge field.

```
TableEnd:StudentParent
```

Now the document displays all of the Parent/Guardian merge fields.

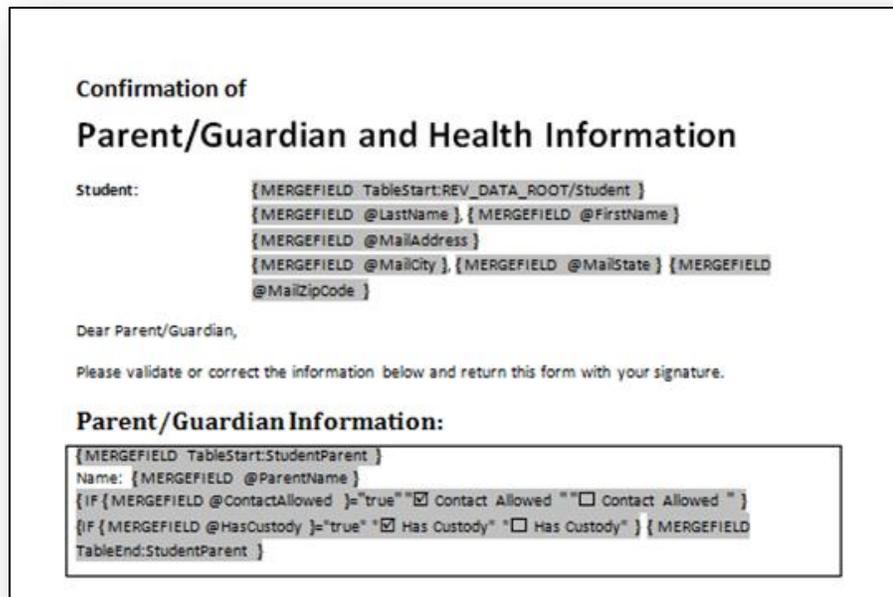


Figure 2-24 XML Field Selection for Example Report

7. In the **Health Conditions** box:

```
TableStart:HealthConditions
```

This is an instruction to retrieve data from REV\_DATA\_ROOT/Student/HealthConditions and to loop through other merge fields until the TableEnd:HealthConditions instruction is encountered.

```
@Comment
```

```
@StartDate
```

```
TableEnd:HealthConditions
```

8. Underneath the Health Conditions box, enter the instructions to end the loop through student records.

```
TableEnd:REV_DATA_ROOT/Student
```

9. **Save** the Word document.

The finished document should look like the following.

**Confirmation of  
Parent/Guardian and Health Information**

Student: {MERGEFIELD TableStart:REV\_DATA\_ROOT/Student }  
 {MERGEFIELD @LastName }, {MERGEFIELD @FirstName }  
 {MERGEFIELD @MailAddress }  
 {MERGEFIELD @MailCity }, {MERGEFIELD @MailState } {MERGEFIELD  
 @MailZipCode }

Dear Parent/Guardian,

Please validate or correct the information below and return this form with your signature.

**Parent/Guardian Information:**

{MERGEFIELD TableStart:StudentParent }  
 Name: {MERGEFIELD @ParentName }  
 {IF {MERGEFIELD @ContactAllowed }="true"  Contact Allowed "  Contact Allowed " }  
 {IF {MERGEFIELD @HasCustody }="true"  Has Custody "  Has Custody" } {MERGEFIELD  
 TableEnd:StudentParent }

**Health Conditions**

{MERGEFIELD TableStart:HealthConditions } {MERGEFIELD @Comment } {MERGEFIELD @StartDate }  
 {MERGEFIELD TableEnd:HealthConditions }

{MERGEFIELD TableEnd:REV\_DATA\_ROOT/Student }

---

Parent/Guardian Signature

Figure 2-25 XML Field Selection for Example Report

**Step Two:** Upload the merge document to Mail Merge Definition.

Navigate to **Synergy SIS>System>Setup>Mail Merge District Definition** or **Mail Merge Definition** screen.

1. Click **Add** at the top of the screen. A new screen opens.
2. Complete as follows:

Mail Merge District Definition				
Name	Type	Default Language	Report Name	Mail Merge Version
Parent/Guardian and He	General	English	STU201 - Student Profile	2.0

Figure 2-26 Mail Merge District Definition Screen

- Enter a **Name** for the substitute report.
- For **Type**, select **General**.
- For **Language**, select **English**.
- Use  to select the **Report Name** – the report for which you are uploading an alternative.

- Select 2.0 for the **Mail Merge Version**.
  - Click **Save**.
3. Click **Add** on the Mail Merge Documents bar.

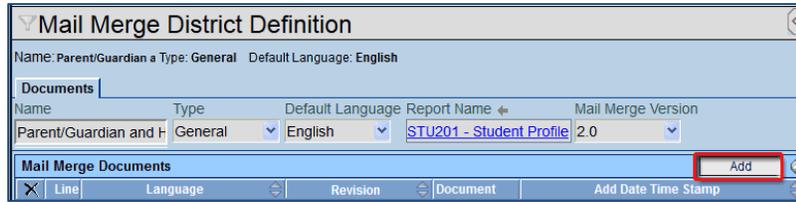


Figure 2-27 Mail Merge District Definition Screen

4. Browse to and select the Word merge document, and click **Upload**.

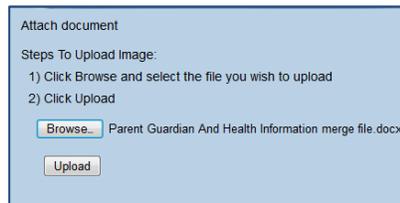


Figure 2-28 Attach Document Screen

5. Select **English** as the **Language**, and click **Save**. The document is now available to substitute for STU201.

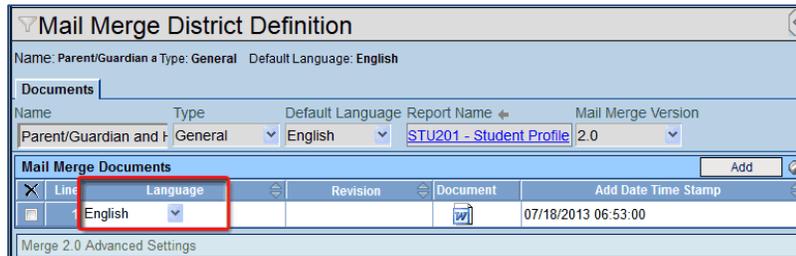


Figure 2-29 Mail Merge District Definition Screen

**Step Three:** *Replace the standard report with the merge document in Pad Security.*

1. Navigate to **Synergy SIS>System>Security>PAD Security**.
2. Select the report that you are replacing.

The screenshot displays the 'PAD Security' configuration interface. On the left is a tree view of the system hierarchy, with 'STU201 - Student Profile' selected. The main area shows configuration for 'Name: K12.Reports.Student Profile'. The 'Report Substitution' field is empty and highlighted with a red box. The 'Quick Launch Text' dropdown is set to 'District Mail Merge' and is also highlighted with a red box. Below this is an 'Access' table with one row: 'Update - Hope High School'.

Line	User Group Name	Access
1	Update - Hope High School	

Figure 2-30 PAD Security Screen

3. Select your Word document from the **District Mail Merge** drop-down.
4. Make sure that **Report Substitution** is blank.
5. Click **Save**. When you run STU201, the result will be a report based on your merge document.

### Behavior Intervention Plan (Synergy SE)

In order to use the Mail Merge 2.0 features, the report must be available in XML format. The Synergy SIS reports described above are available but the Synergy SE reports must be provided by Edupoint to your system administrator.

For the SE reports, Edupoint provides the MS Word template containing the xml in the fields. Text in the template may be customized. Fields may be entirely removed. Sections may be rearranged, taking care to include the appropriate TableStart and TableEnd.

It's important to remember that no matter how the report is customized, this is reflected in the printed report, only. The actual SE screen does not change. Validation rules are still enforced.

**Step One:** *Modify the MS Word template using the desired XML fields to include in the replacement report.*

The Behavior Intervention Plan looks like the following.

Edupoint School District


## Behavior Intervention Plan

Phone: \_\_\_\_\_  
 Fax: \_\_\_\_\_

---

Student Name: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Date: \_\_\_\_\_  
 Date Of Birth: \_\_\_\_\_ Home Address: \_\_\_\_\_  
 Student No.: \_\_\_\_\_ State Student ID: \_\_\_\_\_

Age	Gender	Grade	Home School	Attending School
Ethnicity		Primary Language - Date Determined		Home Language - Date Determined

Parent/Guardian Name		Home Phone	Name	Home Phone
Address		Work Phone	Address	Work Phone
		Emergency Phone		Emergency Phone

**Team Members**

An individual behavior plan is a clearly stated working document which incorporates information from a functional behavior assessment and describes the goals and methods intended to modify a student's negative behavior. A separate plan may be required for each targeted behavior. A successful behavior plan eliminates the negative behavior and allows the student to fulfill the function of the negative behavior through the development of new, positive behaviors.  
 (Note: Behavioral consequences should protect the health and self-esteem of the student and be consistent with local guidelines regarding the use of aversives.)

**Team members who participated in developing the plan**

Positions	Names
Mother	_____
Father	_____
Special Ed Teacher	_____
Case Carrier	_____
Other specialists:	_____
Advisor	_____

**I. Target Behavior**

**Strategies for Implementation**

**II. Prevention - Changes to environment, instruction, adult and peer interactions (considerations but not exclusive nor exhaustive)**

Strategy/Support	Frequency	Person Responsible

**III. Instruction to teach replacement behaviors**

Strategy	Frequency	Person Responsible

**IV. Identified Positive Reinforcers: What does the student like or enjoy?**  
 (based upon administration of a positive reinforcer survey, parent input, student input, etc.)

**V. Replacement Behavior**  
 (What the student should do in place of the problem behavior to meet his/her need(s) [gain, avoid, protest] in an acceptable way.)

---

Edupoint School District - Behavior Intervention Plan
Page 1 of 2

Figure 2-31 Behavior Intervention Plan Page 1

Name	Date of Birth	Student Number	Document Date
------	---------------	----------------	---------------

**VI. Identify steps to follow when replacement behavior occurs**

When Student Does	Frequency	Student will Earn	Person Responsible

**VII. Materials required to implement the plan**

Materials Needed	Person Responsible for Obtaining/Creating

**VIII. Response Cost/Negative Consequences for Undesirable Behavior(s) – Identify sequential steps to follow when targeted behavior occurs**

**IX. Monitoring**  
 Persons responsible for managing BIP and collect data  
 Data will be collected \_\_\_\_\_ and reviewed \_\_\_\_\_  
 Date of BIP Initiation \_\_\_\_\_  
 Quarterly dates of BIP team review meeting  
 MM/DD/YYYY      MM/DD/YYYY      MM/DD/YYYY

Crisis Plan     Yes  
                    No

If yes, please refer to ad hoc documents for directions on completing a crisis plan; electronically attach the plan to the student's file.

---

Edupoint School District - Behavior Intervention Plan Page 2 of 2

Figure 2-32 Behavior Intervention Plan Page 2

The MS Word Behavior Intervention Plan template containing the xml in the fields displays below.

«TableStart:REV\_DATA\_ROOT/StudentDocument»

«ROOT\_ORGANIZATION» **«NAME»** «Image:REV\_REPORT/REV\_HEADER/ORGANIZATION»

Phone:  
Fax:

---

Student Name: «@FormattedName» Home Phone: «@HomePhone» Date: «Date»  
 Date of Birth: «@BirthDate» Home Address: «@Address»  
 Student No: «@SisNumber» State Student ID: «@StateStudentID» «@CityStateZipcode»

---

Age «@Age»	Gender «@Gender»	Grade «@Grade»	Home School «@HomeSchool»	Attending School «@AttendingSchool»
Ethnicity «@EthnicCode»		Primary Language – Date Determined «@PrimaryLanguage»		Home Language «@HomeLanguage»

---

**Parent/Guardian**

Name «./DocParticipantParentGrid[1]/@ParentName»	Home Phone «@HomePhone»	Name	Home Phone
Address «@Address» «@CityStateZipcode»	Work Phone	Address	Work Phone
	Emergency Phone		Emergency Phone

---

**Team Members**

An individual behavior plan is a clearly stated working document which incorporates information from a functional behavior assessment and describes the goals and methods intended to modify a student's negative behavior. A separate plan may be required for each targeted behavior. A successful behavior plan eliminates the negative behavior and allows the student to fulfill the function of the negative behavior through the development of new, positive behaviors.

**Team members who participated in developing the plan**

Positions	Names
«TableStart:./DocParticipantParentGrid» «@RelationType»	«@ParentName» «TableEnd:./DocParticipantParentGrid»
«TableStart:./DocParticipantStaff» «@StaffRoleName»	«@StaffFormattedName» «TableEnd:./DocParticipantStaff»
Other specialists:	
«TableStart:./DocParticipantOther» «@OtherRole»	«@Name» «TableEnd:./DocParticipantOther»

---

**I. Target Behavior**  
«@BIPTargetBehavior»

---

**Strategies for Implementation**

**II. Prevention – Changes to environment, instruction, adult and peer interactions (considerations but not exclusive nor exhaustive)**

Strategy/Support	Frequency	Person Responsible
«TableStart:EnvStrategies» «@EnvStrategy»	«@EnvFrequency»	«@EnvPersonResponsible» «TableEnd:EnvStrategies»

**III. Instruction to teach replacement behaviors**

Strategy	Frequency	Person Responsible
«TableStart:InstStrategies» «@InstStrategy»	«@InstFrequency»	«@InstPersonResponsible» «TableEnd:InstStrategies»

---

«TableStart:REV\_DATA\_ROOT/StudentDocument» «/REV\_REPORT/REV\_HEADER/ROOT\_ORGANIZATION»  
 «/REV\_REPORT/REV\_HEADER/NAME»  
 2 «TableEnd:REV\_DATA\_ROOT/StudentDocument»

Page 1 of

Figure 2-33 MS Word/XML Behavior Intervention Plan Template Page 1

«TableStart: StudentDocumentName «@FormattedName»	Date of Birth «@BirthDate»	Student Number «@SisNumber»	Document Date «@DocumentDate»«TableEnd:REV_DATA_ROOT/StudentDocument»
---	-------------------------------	--------------------------------	--

**Strategies for Implementation**

IV. **Identified Positive Reinforcers: What does the student like or enjoy?**  
 (based upon administration of a positive reinforce survey, parent input, student input, etc.)  
 «@IDPositiveReinfs»

V. **Replacement Behavior**  
 (What the student should do in place of the problem behavior to meet his/her need(s) [gain, avoid, protest] in an acceptable way.)  
 «@ReplacementBehavior»

VI. **Identify steps to follow when replacement behavior occurs**

When Student Does	Frequency	Student will Earn	Person Responsible
«Start: ParaReinProc»«@WhenStuDoes»	«@PRFrequency»	«@StuWillEarn»	«@PRPersonResponsible»«End: ParaReinProc»

VII. **Materials required to implement the plan**

Materials Needed	Person Responsible for Obtaining/Creating
«TableStart:./BIPMaterials»«@MaterialsNeeded»	«@PersonResponsible»«TableEnd:./BIPMaterials»

VIII. **Response Cost/Negative Consequences for Undesirable Behavior(s) – Identify sequential steps to follow when targeted behavior occurs.**  
 «@ResponseCost»

IX. **Monitoring**  
 Persons responsible for managing BIP and collect data «@BIP-ManagementPerson»  
 Data will be collected «@CollectionDate» and reviewed «@ReviewDate»  
 Date of BIP Initiation «@BIPInitDate»  
 Quarterly dates of BIP team review meeting  
 «@BIPReviewMtgDate» «@BIPReviewMtgDate2»«@BIPReviewMtgDate3»«@BIPReviewMtgDate4»  
 Crisis Plan «./StudentDocument-CrisisPlan[@CrisisPlan]»YES  
 «./StudentDocument-CrisisPlan[@CrisisPlan]»NO  
 If yes, please refer to ad hoc documents for directions on completing a crisis plan; electronically attach the plan to the student's file.

«TableEnd:REV\_DATA\_ROOT/StudentDocument»

---

«TableStart:REV\_DATA\_ROOT/StudentDocument»«/REV\_REPORT/REV\_HEADER/ROOT\_ORGANIZATION»  
 «/REV\_REPORT/REV\_HEADER/NAME»  
 «TableEnd:REV\_DATA\_ROOT/StudentDocument»

Page 2 of

Figure 2-34 MS Word/XML Behavior Intervention Plan Template Page 2

**Step Two:** Upload the merge document to Mail Merge Definition.

6. Navigate to **Synergy SE>System>Setup>Mail Merge District Definition** or **Mail Merge Definition** screen.
7. Click **Add** at the top of the screen. A new screen opens.
8. Complete as follows:

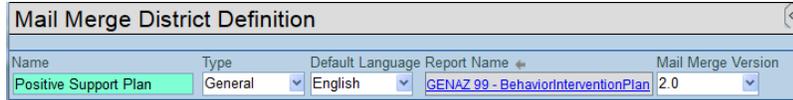


Figure 2-35 Mail Merge District Definition Screen

- Enter a **Name** for the substitute report.
  - For **Type**, select **General**.
  - For **Language**, select **English**.
  - Use ← to select the **Report Name** – the report for which you are uploading an alternative.
  - Select 2.0 for the **Mail Merge Version**.
  - Click **Save**.
9. Click **Add** on the Mail Merge Documents bar.

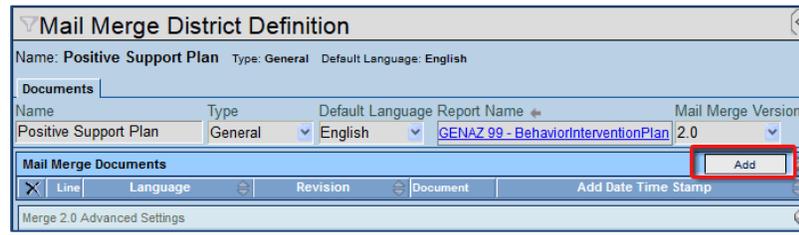


Figure 2-36 Mail Merge District Definition Screen

10. Browse to and select the Word merge document, and click **Upload**.

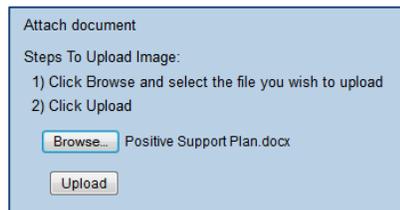


Figure 2-37 Attach Document Screen

11. Select **English** as the **Language**, and click **Save**. The document is now available to substitute for GENAZ99.

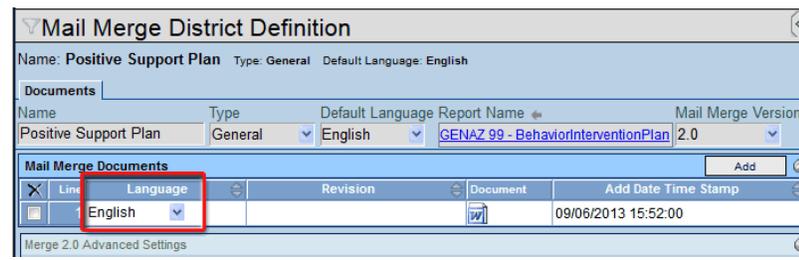


Figure 2-38 Mail Merge District Definition Screen

# Chapter Three: XPath Expressions

In this chapter, the following topics are covered:

- Numeric Comparison
- String Comparison
- Absolute And Relative Paths
- Nodes and Attributes

## NODES AND ATTRIBUTES

Most of these examples print data that is an attribute of some XML node. However, sometimes you might want to print a node rather than an attribute. For example, in the following XML, the name of the organization is an entire node, not an attribute of another node.

```
<?xml version="1.0"?>
- <REV_REPORT>
  - <REV_HEADER>
    <NAME>Student Profile</NAME>
    <NUMBER>STU201</NUMBER>
    <GUID>ECC3F80A-8500-4C91-A55A-7273F13F9D27</GUID>
    <ORIENTATION>PORTRAIT</ORIENTATION>
    <ORGANIZATION>Adams Elementary</ORGANIZATION>
    <YEAR>2012</YEAR>
    <YEAR_TYPE/>
```

Figure 3-1 Organization Node

If it were an attribute of something else, it would display in the XML as something like `<PARENTNODE Organization="Adams Elementary">` and you would refer to it in a merge document as `@Organization`.

In fact, it is an entire node, and the following merge field prints its value.

```
MERGEFIELD /REV_REPORT/REV_HEADER/ORGANIZATION \* MERGEFORMAT
```

## NUMERIC COMPARISON

The IDS402 - Student Demerit List includes a count of each student's demerits.

```
- <REV_DATA_ROOT>
  <REV_DATE>06/11/2013</REV_DATE>
  <REV_TIME>11:26 AM</REV_TIME>
  - <Student TotalIncidents="0" TotalDemerits="0" Grade-Code="200" Grade="10" Gender-Code="M" Gender="M" StudentName="Abers, Douglas L."
    SisNumber="900757" StudentGU="EE830E91-0405-4A0C-8F43-06DBE24EC334">
      <StudentParent RelationType-Code="F" RelationType="Father" PrimaryPhoneExtn="" PrimaryPhoneType-Code="" PrimaryPhoneType="" PrimaryPhone=""
        ParentName="Abers, Justin"/>
      <StudentParent RelationType-Code="M" RelationType="Mother" PrimaryPhoneExtn="" PrimaryPhoneType-Code="C" PrimaryPhoneType="Cell"
        PrimaryPhone="480-555-2201" ParentName="Abers, Cheryl"/>
      <StudentParent RelationType-Code="SF" RelationType="Step-Father" PrimaryPhoneExtn="" PrimaryPhoneType-Code="C" PrimaryPhoneType="Cell"
        PrimaryPhone="480-555-3201" ParentName="Devine, Scott"/>
    </Student>
  - <Student TotalIncidents="0" TotalDemerits="0" Grade-Code="210" Grade="11" Gender-Code="F" Gender="F" StudentName="Abramson, Sarah L."
    SisNumber="888219" StudentGU="C24B63A1-7B1F-4B43-B9E0-693BA422C6F5">
      <StudentParent RelationType-Code="M" RelationType="Mother" PrimaryPhoneExtn="" PrimaryPhoneType-Code="H" PrimaryPhoneType="Home"
        PrimaryPhone="480-555-0354" ParentName="Abramson, Jacqueline"/>
      <StudentParent RelationType-Code="F" RelationType="Father" PrimaryPhoneExtn="" PrimaryPhoneType-Code="C" PrimaryPhoneType="Cell" PrimaryPhone="602
        -555-9568" ParentName="Abramson, Thomas"/>
    </Student>
```

Figure 3-2 Student Demerits in XML

Mail Merge 2.0 can vary the output based on the value of a numeric field. The following merge field, embedded in a loop through student records, tests whether each student has more than two demerits:

```
{ MERGEFIELD "TableStart:IF @TotalDemerits > "2" " }
```

The fields between that merge field and the corresponding TableEnd print only for students whose demerit totals exceed two.

Boolean and other operators are also available.

```
{ MERGEFIELD "TableStart:IF @TotalDemerits > "2" and @TotalDemerits < "5" "
}
```

For details, see <http://www.w3schools.com/xpath> or another XPath reference.

## STRING COMPARISON

In XPath, you use predicates, in square brackets, to select nodes that contain a specific value. That value can be a string. The Report Card, GRD201, includes a name for each mark, such as **Sem 1 Final** or **Sem 2 Final**.

```
- <REV_DATA_ROOT>
  <REV_DATE>06/11/2013</REV_DATE>
  <REV_TIME>3:12 PM</REV_TIME>
  - <ReportCardStudentFB BarCodeRawData="" DaysPrs="" DaysEnr="" DaysAbs="" HomeroomTeacherLastName=""
    HomeroomTeacherName="Schubert, Thorne" RankName2="" RankName1="" CreditsCompleted="" CreditsAttem
    CustomSortField="" TrackGU-Code="" TrackGU="" StudentGU="7FCBF5EE-F96D-4F97-8917-E4F7FA336BEE"
    PK="68253904-DC15-40A4-9867-B1C4DC8D49C1" ZipCode="85606" StudentName="Jamison, John A." Sis
    ParentName="Parent/Guardians of Jamison, John A." Address="3933 E Des Moines St" CityStateZipCode="I
      - <ReportCardSectionFB OrgName="Hope High School" WorkHabits="" TermCode-Code="S1" TermCode="Sei
        SectionGU="2BA0B10E-F186-451E-B09E-59637438C5A2" PeriodStart="0" CourseTitle="Rel Time A Hr"
          <ReportCardMarkFB WorkHabits="" Credit="0.50" CreditAttemptedActual="" CreditActual="" CurAbs2=""
            WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
            MarkType="A" Mark="D" MarkName="Sem 1 Final" >
          <ReportCardMarkFB WorkHabits="" Credit="0.50" CreditAttemptedActual="" CreditActual="" CurAbs2=""
            WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
            MarkType="A" Mark="D" MarkName="2nd Qtr" >
          <ReportCardMarkFB WorkHabits="" Credit="0.00" CreditAttemptedActual="" CreditActual="" CurAbs2=""
            WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
            MarkType="A" Mark="A" MarkName="1st Qtr" >
          </ReportCardSectionFB>
        + <ReportCardSectionFB OrgName="Hope High School" WorkHabits="" TermCode-Code="S2" TermCode="Sei
          SectionGU="7A436A37-9358-4EBE-9F5B-D91C1C73BBB4" PeriodStart="0" CourseTitle="Rel Time A Hr"
        - <ReportCardSectionFB OrgName="Hope High School" WorkHabits="" TermCode-Code="S1" TermCode="Sei
          SectionGU="E27CB755-51FC-4120-BF96-31E4CED6C84D" PeriodStart="1" CourseTitle="Accel Alg II" Co
            <ReportCardMarkFB WorkHabits="" Credit="0.50" CreditAttemptedActual="" CreditActual="" CurAbs2=""
              WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
              MarkType="A" Mark="A-" MarkName="Sem 1 Final" >
            <ReportCardMarkFB WorkHabits="" Credit="0.00" CreditAttemptedActual="" CreditActual="" CurAbs2=""
              WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
              MarkType="A" Mark="C" MarkName="1st Qtr" >
            <ReportCardMarkFB WorkHabits="" Credit="0.50" CreditAttemptedActual="" CreditActual="" CurAbs2=""
              WorkHabits-Code="" Conduct-Code="" Conduct="" Citizenship-Code="" Citizenship="" SchYrGrdPrdMk
              MarkType="A" Mark="A-" MarkName="2nd Qtr" >
            </ReportCardSectionFB>
```

Figure 3-3 Mark Names in XML

The following merge field, embedded in a loop through student report card data, tests whether each mark's name is **Sem 1 Final** and prints the value of **Mark** only if it is.

```
{ MERGEFIELD ReportCardMarkFB[@MarkName='Sem 1 Final']/@Mark }
```

## ABSOLUTE AND RELATIVE PATHS

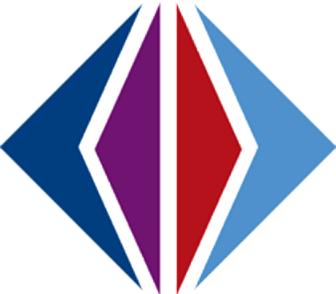
A slash at the beginning of a path, defines an absolute path to a node, relative to the root. So `/x`, points to the node `x`, that is a child of the root, and `/x/y` points to the node `y`, that is a child of `x`.

Two slashes at the beginning of a path define a node anywhere in the XML document. So `//x`, points to node `x`, anywhere in the XML document.

A dot means “self”; that is, it refers to the current (context) node. So `./x`, refers to the node `x`, that is a child of the current node.

Two dots refer to the parent node of the current (context) node. So `../x`, refers to the node `x`, that is a sibling of the current node.

For details, see [w3schools.com](http://w3schools.com), or another XPath reference.



# Chapter Four: TIPS AND TRICKS

In this chapter, the following topics are covered:

- Synergy Mail Merge 2.0
- Microsoft Word Mail Merge

# SYNERGY MAIL MERGE 2.0

## Mail Merge Document Types and Mail Merge Version

The **Labels** document type has the same header and footer throughout (if it has a header and footer at all). It is typically a list report, like the Custom LCK402 report in Chapter One.

The **General** document type enables the header or footer to change for each student, course, staff member, or whatever is the subject of the report. The Merge XPath field controls Pagination.

Figure 4-1 Mail Merge District Definition Screen

## Mail Merge Version

For the purposes of creating a custom mail merge report using a Synergy report, always select Mail Merge Version 2.0. Mail Merge version 1.0 is for the straightforward mail merge functionality that does not employ XML customizations.

Figure 4-2 Mail Merge Definition Screen

## Multiple Mail Merge Documents

Merge documents that you upload on the **Mail Merge Definition** screen take precedence over those that you upload on the **Mail Merge District Definition** screen.

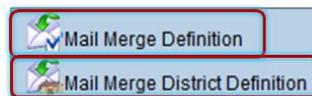


Figure 4-3 PAD Tree Mail Merge Definition Modules

Typically, Mail Merge District Definition is used at the district level, and Mail Merge Definition at the school level, but this need not be the case. District policy determines which organizations have access to which screens, and which mail merge documents can be overridden.

## Merge 2.0 Advanced Settings (Merge XPath)

You control pagination with the **Merge XPath** field on the **Mail Merge District Definition** or **Mail Merge Definition** screen. In **Merge XPath**, you put an XPath expression to define the node where Synergy begins a new page in the report.

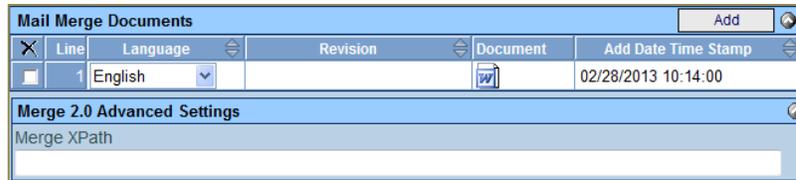


Figure 4-4 Mail Merge District Definition Screen

For example, a **Merge XPath** of `REV_DATA_ROOT/Student` starts a new page for each student, whereas a **Merge XPath** of `REV_DATA_ROOT/Student/StudentParent` starts a new page for each parent of each student.

### TableStart and TableEnd

A `TableStart` command and its closing `TableEnd` cannot span entities like Word table rows and section breaks. That is, a `TableStart` in a row of a Word table, or section of a Word document, must have a `TableEnd` in that same row or section.

If, while processing a mail merge, Synergy displays an error message to the effect that it has found an end of a mail merge region that does not match the start of the mail merge region, a `TableEnd` command is missing or misplaced.

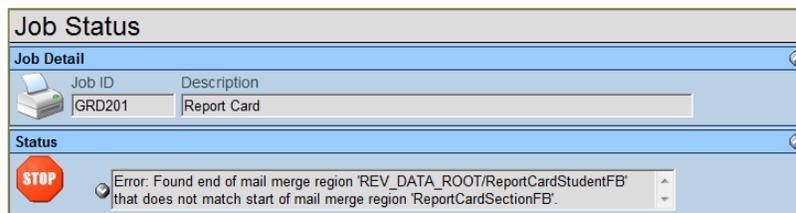


Figure 4-5 Job Status Screen

### Image Scaling

If the Synergy report that your merge document is based on contains an image, you can include that image in your custom report as well. By default, the image displays full size, but you can resize it.

The following merge field inserts an organization's logo scaled to 50 pixels wide and 80 pixels high:

```
{ MERGEFIELD Image:/REV_REPORT/REV_HEADER/ORGANIZATION_LOGO??x=50,y=80 }
```

The following merge field inserts an organization's logo scaled to 50% of its width and height:

```
{ MERGEFIELD Image:/REV_REPORT/REV_HEADER/ORGANIZATION_LOGO??x=50%,y=50% }
```

# MICROSOFT WORD MAIL MERGE

## How Merge Fields Display

You might find it useful for Word to display fields, including merge fields, with a gray shaded background.

```
{ MERGEFIELD @MailAddress }
```

```
{ MERGEFIELD @MailAddress }
```

In addition, you might prefer to have fields display with or without the MERGEFORMAT command and its switches.

```
{ MERGEFIELD @MailAddress \* MERGEFORMAT }
```

```
«@MailAddress»
```

To change Word's default behavior:

1. Click **File**, then **Options**.

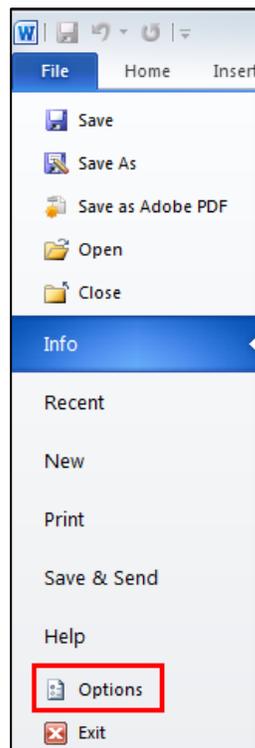


Figure 4-6 MS Word Options

2. Click **Advanced**, and scroll to the **Show document content** section.

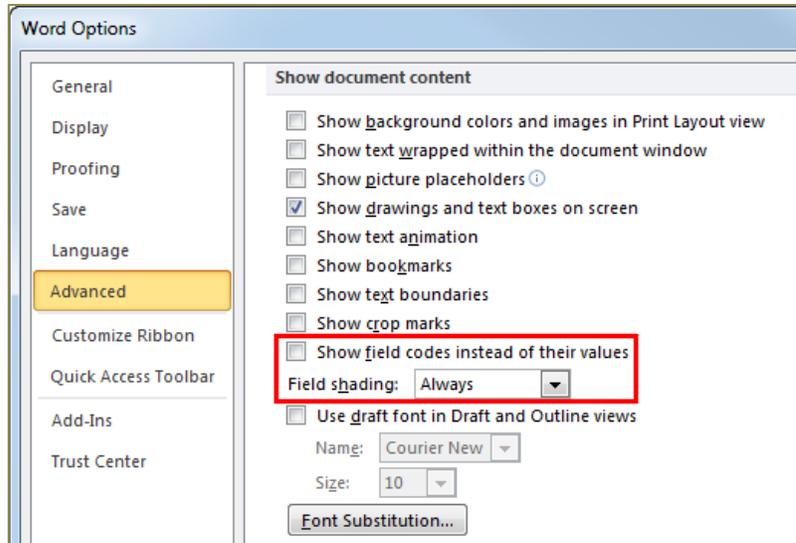


Figure 4-7 MS Advanced Word Options

3. Check **Show field codes instead of their values** to display fields with their commands and switches, or clear it to display fields without them.
4. Click **Field shading** drop-down and select **Never**, **Always**, or **When selected** depending on your preference.

You can also select or clear **Show field codes instead of their values** by pressing Alt+F9. Pressing Shift+F9 switches between showing and hiding the MERGEFORMAT command and its switches for selected fields only.

You can change the text in a merge field to make it more reader-friendly and print-friendly without changing the underlying functionality. For example, consider a field that looks like the following when you show field codes:

```
{ MERGEFIELD TableStart:REV_DATA_ROOT/ReportCardStudentFB }
```

By default, if you toggle field codes, the field looks like the following:

```
«TableStart:REV_DATA_ROOT/ReportCardStudent»
```

You can type over the text between « and » to make it easier to read. For example:

```
«StudentStart»
```

Toggle field codes again to see that the field and its functionality do not change.

```
{ MERGEFIELD TableStart:REV_DATA_ROOT/ReportCardStudentFB }
```

## The \\* MERGEFORMAT Switch

The \\* MERGEFORMAT switch, inserted by default in many Word fields, preserves formatting when the fields are updated.

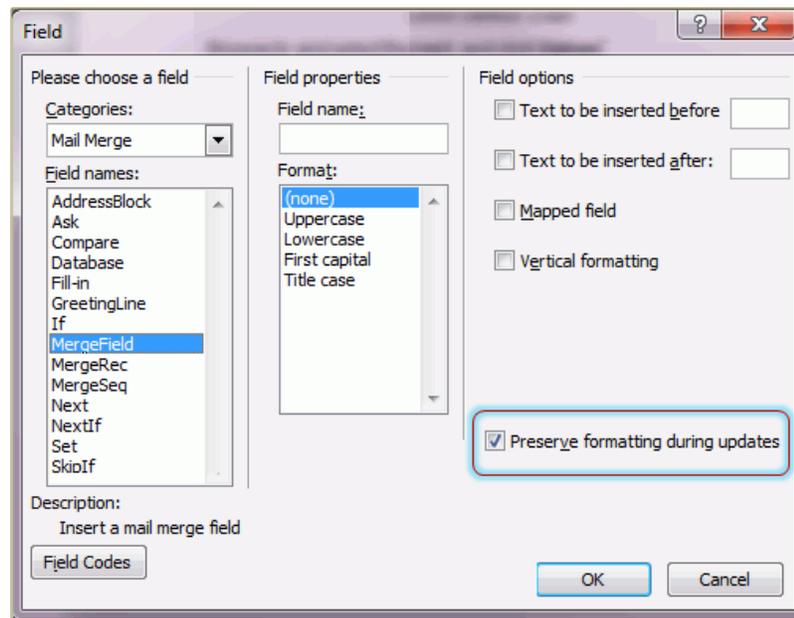


Figure 4-8 MS Word Insert Field Selection

If you format the document so a date field is bold and italic, the `\* MERGEFORMAT` switch ensures that when the date changes, the display of the date stays bold and italic.

```
{ DATE \* MERGEFORMAT }
```

The way merge fields are used in Mail Merge 2.0, Synergy adds data to fields once, when you run a custom report, and the field values are never updated. Thus, for our purposes, the following two fields are functionally identical.

```
{ MERGEFIELD @MailAddress \* MERGEFORMAT }
```

```
{ MERGEFIELD @MailAddress }
```

### Quickly Insert a Field

You can press `Ctrl+F9` to insert a blank field.

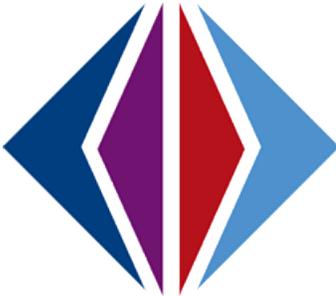
```
{ }
```

If you are comfortable working with Word macros, you can create one that inserts a merge field, which is just a field that contains the word `MERGEFIELD`.

```
{ MERGEFIELD }
```

# INDEX

- attribute, 23, 34
- Available Reports, 6
- Caution, 4
- Data fields, 7
- display fields, 42, 43
- District Mail Merge**, 16
- error message, 41
- Field shading**, 43
- formatting, 8, 20, 22, 43
- HLT201 - Student Health Profile, 6
- insert check boxes, 23
- Mail Merge**, 1, 5, 6, 8, 11, 12, 13, 14, 15, 20, 26, 27, 28, 31, 32, 35, 39, 40, 41, 42, 44
- Mail Merge Definition, 14, 25, 31, 40
- Mail Merge District Definition**, 14, 15, 25, 26, 31, 32, 40, 41
- node, 14, 19, 20, 34, 37, 40
- nodes, 8, 19, 36
- numeric, 23, 35
- PAD Security**, 6, 15, 16, 27
- pagination, 40
- Preserve formatting during updates**, 20
- Quick Parts**, 13, 20
- Report Substitution**, 16, 27
- square brackets, 36
- TableEnd, 8, 9, 14, 20, 22, 23, 24, 28, 35, 41
- TableStart, 8, 14, 20, 22, 24, 28, 35, 41, 43
- XML, 6, 7, 8, 12, 14, 18, 19, 20, 22, 24, 25, 28, 30, 31, 34, 35, 36, 37, 40
- XPath, 7, 8, 9, 13, 14, 20, 33, 35, 36, 37, 40, 41



# INDEX OF SCREENS

Figure 1-1 Synergy SIS Reports.....	6
Figure 1-2 Synergy SE Reports .....	6
Figure 1-3 HLT201.....	6
Figure 1-4 Customized Example HLT201.....	7
Figure 1-5 XML Output Displayed In Internet Explorer .....	8
Figure 2-1 LCK402 - Students With No Lockers .....	12
Figure 2-2 Custom LCK402 - Students With No Lockers Example .....	12
Figure 2-3 Report Interface Sort /Output Tab.....	12
Figure 2-4 MS Word Custom Report .....	13
Figure 2-5 MS Word Ribbon.....	13
Figure 2-6 MS Word Insert Field Selection .....	13
Figure 2-7 MS Word Field Selection .....	13
Figure 2-8 MS Word Field Selection .....	14
Figure 2-9 Merge Fields Example Word Document .....	14
Figure 2-10 Mail Merge District Definition Screen.....	15
Figure 2-11 Mail Merge District Definition Screen.....	15
Figure 2-12 Attach Document Screen .....	15
Figure 2-13 Mail Merge District Definition Screen.....	15
Figure 2-14 PAD Security Screen .....	16
Figure 2-15 STU201 - Student Profile Report .....	17
Figure 2-16 Confirmation of Parent/Guardian and Health Information Report .....	18
Figure 2-17 MS Word Custom Report .....	19
Figure 2-18 STU201 - Student Profile Report XML Format.....	19
Figure 2-19 STU201 - Student Profile Report XML Format.....	20
Figure 2-20 STU201 - Student Profile Report XML Format.....	20
Figure 2-21 MS Word Field Selection .....	21
Figure 2-22 XML Field Selection for Example Report .....	22
Figure 2-23 XML Field Selection for Example Report .....	22
Figure 2-24 XML Field Selection for Example Report .....	24
Figure 2-25 XML Field Selection for Example Report .....	25
Figure 2-26 Mail Merge District Definition Screen.....	25
Figure 2-27 Mail Merge District Definition Screen.....	26
Figure 2-28 Attach Document Screen .....	26
Figure 2-29 Mail Merge District Definition Screen.....	26
Figure 2-30 PAD Security Screen .....	27
Figure 2-31 Behavior Intervention Plan Page 1 .....	28
Figure 2-32 Behavior Intervention Plan Page 2 .....	29
Figure 2-33 MS Word/XML Behavior Intervention Plan Template Page 1.....	30

*Figure 2-34 MS Word/XML Behavior Intervention Plan Template Page 2 ..... 31*

*Figure 2-35 Mail Merge District Definition Screen ..... 32*

*Figure 2-36 Mail Merge District Definition Screen ..... 32*

*Figure 2-37 Attach Document Screen ..... 32*

*Figure 2-38 Mail Merge District Definition Screen ..... 32*

*Figure 3-1 Organization Node ..... 34*

*Figure 3-2 Student Demerits in XML ..... 35*

*Figure 3-3 Mark Names in XML ..... 36*

*Figure 4-1 Mail Merge District Definition Screen ..... 40*

*Figure 4-2 Mail Merge Definition Screen ..... 40*

*Figure 4-3 PAD Tree Mail Merge Definition Modules ..... 40*

*Figure 4-4 Mail Merge District Definition Screen ..... 41*

*Figure 4-5 Job Status Screen ..... 41*

*Figure 4-6 MS Word Options ..... 42*

*Figure 4-7 MS Advanced Word Options ..... 43*

*Figure 4-8 MS Word Insert Field Selection ..... 44*