



Synergy[™]

Education Platform

Synergy Guide

New Year Rollover Process



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NYR Process Overview

THIS GUIDE

This guide provides a detailed description of the New Year Rollover process. Along the way, tips to navigate the functionality may be provided. A tip reminder is provided in the form of a link.

OVERVIEW

What is New Year Rollover?

The New Year Rollover (NYR) process creates and copies files and student records for the new school year. It creates a basic calendar for the district and each school in the district. It copies the configuration of most of the screens, and enrolls returning students in the new year.

Most of the rollover process is run through the New Year Rollover setup screen. However, there is essential preparation throughout the system before starting the rollover.

When is the New Year Rollover process run?

Typically, districts run NYR in the spring but it must be run before schools can begin building their master schedules for the next year.

Can the process be run during the school day?

NYR can be run during normal business hours while the system is being used, however if you have errors, and need to restore the backup; it is easier if you have run the initial process on a dedicated system.

If a user makes changes to data while you are running any step of NYR, there is a chance the data can become corrupted and/or prevent NYR from working correctly.

The best practice is to set up and run the NYR process on a test environment first to verify you are getting the desired results.

What does the process involve?

Before beginning, there is preparation for the NYR process.

Then, while the focus is set to the current school year and at a school, there is the creation of NYR process sets.

The next step is running (sometimes referred to as executing) the NYR.

Finally, there are a few steps after running the final NYR, for the current school year.

This guide provides a detailed description of this process, along with checklists for each step, for a successful New Year Rollover!

Below is a list of the recommended steps in the NYR process. Detailed explanations of these steps are covered in this guide. This checklist, in its entirety, is available at the end of the guide, also.

NYR CHECKLIST

STEP ONE:

Before beginning the New Year Rollover process, several decisions need to be made and information needs to be gathered. They can be completed in any order.

STEP 1 - PREPARATION	
Verify New Year Extension exists in District Setup > Options Tab > Organization Year Tree. If not, add Regular Extension to new year, linking to all organizations	<input type="checkbox"/>
Grade Setup (Check for proper grade promotion)	<input type="checkbox"/>
Verify Next Grade and Next School fields are blank in the current school year, unless students are retained.	<input type="checkbox"/>
Identify retained students and next school exception students. Update next grade and school manually for these students	<input type="checkbox"/>
Review Configuration Files, Enrollment, and Student Properties tabs in NYR Setup screen	<input type="checkbox"/>
Identify any changes to attendance codes, discipline codes, etc. for the new year	<input type="checkbox"/>
Gather District and School Calendar – Start, End, and Enrollment Enter dates. Identify grading periods and term start and end dates	<input type="checkbox"/>
Determine any changes to school boundaries for the new year.	<input type="checkbox"/>
Determine whether to use/not use Grid Codes for next school assignments. Run the <i>NYR401 Boundary Exception Students</i> report to identify invalid grid code issues.	<input type="checkbox"/>
Decide how to set-up process sets - type, function or a combination of both Recommended order: Configuration files, Create Calendars, Mass Assign Next Grade and School, Process Students. You may need multiple sets to accommodate your specific district configuration. It is recommended not including more than 10 schools when processing students. This will help to avoid timeouts, and can be helpful if troubleshooting.	<input type="checkbox"/>
Process Server set to 300 minutes run time or greater (max is 360 min.) Clear Event Log in Process Service	<input type="checkbox"/>
Prior to running any process back up the database (some functions cannot be reversed)	<input type="checkbox"/>

STEP TWO:

These steps should be completed in the following order.

STEP 2 - STEPS TO SETUP THE PROCESS SETS		
1	Set Focus to a school and the current year (not to the Dist. or a sub-node)	<input type="checkbox"/>
2	Create your process sets. If you previously created process sets for past school years, edit/rename them so they are grouped together and not confused with the new ones you will create for this school year process. Be sure to update enrollment and calendar defaults on the Schools tab.	<input type="checkbox"/>
3	Update information on each of the NYR Setup process tabs: Execute , Schools , Grade Levels , Enrollment Properties , Student Properties , Configuration Files , (and optionally, Student Filter)	<input type="checkbox"/>
	Note – The History tab will contain information about the processes immediately after they are run or executed.	
	Note – Student Locker and Student Group assignments (Configuration Files Tab) must be included in the initial Process Students definition. Both Process Students and Process Configuration Files must be checked on the Execute Tab.	
	Note -Configuration File definition must include District-Grid (even if not using Grids)	
	Note – Schools Tab > Calendar Types grid – Default Calendar Dates and Enrollment Defaults> all fields must be populated for all definitions created.	

STEP THREE:

It is strongly suggested these steps be completed in this order.

STEP 3 - RUN THE PROCESS SETS (SUGGESTED ORDER)		
1	Focus to current year and school	<input type="checkbox"/>
2	Process the configuration sets for the district and all schools in this order:	<input type="checkbox"/>
	1. District Configuration – All appropriate District file types	<input type="checkbox"/>
	2. School Setup Configuration – School Setup/School Grade/School Year Term Def/School Setup Tracks	<input type="checkbox"/>
	3. School Configuration – All other applicable School file types	<input type="checkbox"/>
3	Remember to check the History tab for errors as it will contain information about the processes immediately after they are run or executed	
4	Clear cache and log out/in after processing configuration sets	<input type="checkbox"/>
5	Create the calendars for the district and all schools	<input type="checkbox"/>
6	Clear cache and log out/in after creating calendars	<input type="checkbox"/>
7	Assign next grade and school for all schools	<input type="checkbox"/>
8	Take care of retentions and next school exceptions (Option)	<input type="checkbox"/>
9	Process Students	
10	Process year end status and expected graduation year, if needed. (Option)	<input type="checkbox"/>
11	Use the Year End Status Update screen in Synergy SIS Grading in lieu of the NYR function. (Option)	<input type="checkbox"/>

STEP FOUR:

These steps should be completed in the following order.

STEP – 4 AFTER THE PROCESS	
Do not run Gradebook synch for the new year until you are done with the current year	<input type="checkbox"/>
Change focus to new year	<input type="checkbox"/>
Update district and school calendars with holidays, etc.	<input type="checkbox"/>
Set school term definitions for each school. (Option: use the School Setup Copy screen in System > Data Maintenance to copy the setup for one school to others)	<input type="checkbox"/>
Update Grading Period dates for each school. (Use the above option to copy setup to other schools.)	<input type="checkbox"/>
District Setup > System Tab > Enrollment Options – Disable New Year Activation checkbox. Decide to use the built in option of updating new enrollments and student inactivation's or disable the function in District Setup.	<input type="checkbox"/>
Make any needed changes to Attendance, Discipline, and other setup options.	<input type="checkbox"/>
Run the processes as many times as needed to update the new year information. (Remember: Not all processes are fully changeable.)	<input type="checkbox"/>
Update Grad and Year End Status if needed. Synergy SIS > Grading > Year End Status Update screen. This must be done at each school.	<input type="checkbox"/>
User Groups can be mass updated to log into the new school year. Synergy SIS > System > User > User Groups > Menu > Mass Change Member Users	<input type="checkbox"/>

Step One: PREPARATION

Before beginning the New Year Rollover process, there are several decisions to make and information to gather.

NEW YEAR EXTENSION AND GRADE SETUP VERIFICATION

1. Go to **SynergySIS>System>Setup>District Setup**.
2. Click on the **Grade Setup** tab, and make sure that the **Next Grade** and the **Years Until Graduation** columns are configured correctly.

Line	Grade	Next Grade	Years Until Graduation	ADA Group
1	PS	K	13	
2	K	01	12	K
3	01	02	11	01-03
4	02	03	10	01-03
5	03	04	9	01-03
6	04	05	8	04-06
7	05	06	7	04-06
8	06	07	6	04-06
9	07	08	5	07-08
10	08	09	4	07-08
11	09	09	3	09-12
12	10	10	2	09-12
13	11	11	1	09-12
14	12	12		09-12
15	12+			

Figure 1 District Setup Screen Grade Setup Tab

1. Click on the **Options** tab to verify that the New Year extension has been created on Organization Year Tree grid.

Line	Setup Screens
1	District Attendance Code
2	District Discipline Code
3	District Course
4	District Groups
5	District Tracks

Figure 2 District Setup Screen Options Tab

2. Click the blue triangle  next to the year to view the extension. The triangle turns green  and points down.
3. If there is no extension created, click on the year to highlight it.
4. From the Action drop-down select **Add Extension to**. The Add Year Extensions screen opens.

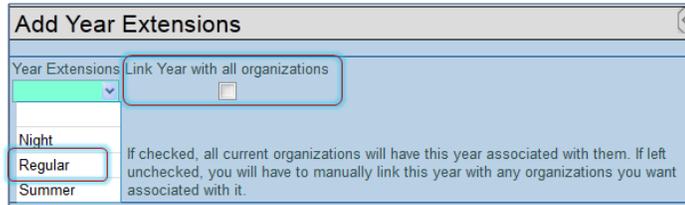


Figure 3 Add Year Extensions Screen

5. Click **Year Extensions** drop-down and select **Regular**.
6. Check **Link Year with all organizations** so that all current organizations will have this year associated with them. If left unchecked, you will have to manually link this year with any organizations you want associated with it.



Figure 4 Organization Screen

1. Go to the Synergy SIS>System>Setup>Organization screen.
2. Verify that the New Year extension has been linked to a school.
3. Click on  to reveal district schools.
4. Click on a **school name**. The name highlights and a detailed screen opens to the right.
5. Click on the **Years** tab.
6. If the school year is not visible, click **Add** on the Year Options Grid. The Organization Year Add Screen opens.
7. Click **Organization Year Choices** drop-down and select the year.
8. Click **Save**. The Organization Year Add screen closes and the year displays.

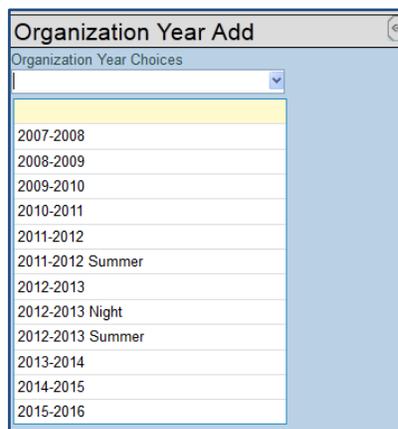


Figure 5 Organization Year Add Screen

- Click on the **School Tab** and make sure schools included in the NYR process have been checked as **Live in Synergy**.

School Name: Adams Elementary

School | Years | Special Education | Documents

School Information

Address Information

Other Information

Phone: 949-555-2425 | Fax: | Counselor Dept Phone: |

Sis School Code: 101 | State CTDS Code: 123456101 | Alt Funding School Code: |

College Board School Number: |

Website URL: |

Default Email Address: |

Live In Synergy

Hide Organization From General Use

Central Print ID
to update this value, change State CTDS Code.

Figure 6 Organization Screen Schools Tab

NEXT SCHOOL ASSIGNMENT

Prior to creating your option sets, determine how to identify the next school for students.

Using a matrices or query, verify that the **Next Grade** and **Next School** fields are blank in the current year; especially the high grades at each school (with the exception being retentions).

- Go to **Synergy SIS>Student>Student** screen.
- Click on the **Other Info** tab.

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

School Information

Other Information

Enrollment Restrictions and Exceptions

Next Year

Year End Status | **Next Grade Level** | **Next School**

Figure 7 Student Screen Other Info Tab

- Enter an asterisk in the **Grade**, **Next Grade Level** and **Next School** fields.
- Click **Find**. The Student: Find Result screen displays a list of all students.

- If you know which students are being retained, you will want to **manually update** the next grade and next school fields on the **Student screen Other Info tab**. Just selecting a Year End Status of Retained will not determine the next grade or next school assignment

Line	Last Name	First Name	Middle Name	Perm ID	Grade	Next Grade Level	Next School
1	Abbott	Billy	C	905483	12		
2	Abel Jones Holbrook	Albert Joseph	Ryan	132683	12		
3	Abernathy	Bruce	Vanlee	879138	12		
4	Abernathy	Anne	Elizabeth	902870	11		
5	Abers	Douglas	Lowell Carter	900757	12		
6	Abrigo	Scott	Datugan	148102	12		
7	Acevedo	Andrew		886630	11		

Figure 8 Student: Find Screen

- Next Grade** and **Next School** will have to be updated manually for any students going to a specific school (out of the norm) due to special circumstances. For example a special program that is not offered at their home school, or a unique boundary situation.

ENROLLMENT AND STUDENT PROPERTIES

Review the Enrollment Properties and Student Properties tabs in New Year Rollover Setup prior to creating option sets. The selections on these tabs will be used when processing students from the current year to the New Year. Enrollment Properties are school year specific.

- Go to **Synergy SIS>System>Setup>New Year Rollover Setup screen**.
- Click on **Enrollment Properties** tab.
- Review the fields on this tab, and determine how the information will roll to the same school, as well as to a different school. See: [Enrollment Properties List](#).

Line	Enrollment Field	Action	Value to Set	Action	Value to Set
1	AbsenceReportingPolicy	Keep Existing Val		Keep Existing Val	
2	AllowMedication	Keep Existing Val		Keep Existing Val	
3	AllowTylenol	Keep Existing Val		Clear Value	
4	AttendPermitDate	Keep Existing Val		Keep Existing Value	
5	BusRouteFromSchool	Keep Existing Val		Set Value	
6	BusRouteToSchool	Keep Existing Val		Keep Existing Val	
7	CahseeElaRetake	Keep Existing Val		Keep Existing Val	

Figure 9 New Year Rollover Setup Screen Enrollment Properties Tab

The following options are available for students rolling to the same school as well as a different school:

- **Keep Existing Value**
- **Clear Value**
- **Set Value**

User Defined fields can be included in the processing on this tab, as well.

- Click the **Student Properties** tab. This tab is specific to Student properties and User Defined Student Properties.

- Click **Add** on the Student Properties bar. A new line is added to the grid.

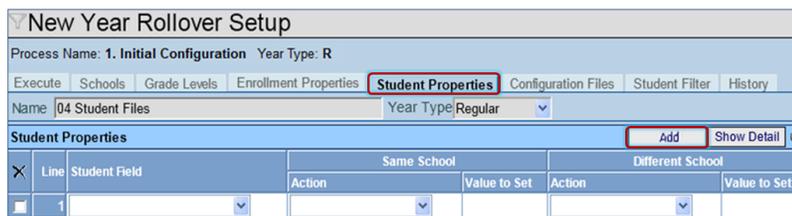


Figure 10 New Year Rollover Setup Screen Student Properties Tab

- Select the **Student Field** from the drop-down.
- Select the **Same School Action** from the drop-down. The same values exist as on the Enrollment Properties tab. Not selecting a property will have the result of 'Keeping the Existing Value'. Student Properties are not year specific. If you Clear or Set the Value, all years will be effected. See example below.
- Repeat the same procedure for any User-Defined Student Properties.



Figure 11 New Year Rollover Setup Screen Student Properties Tab

- Click **Save** when finished.

Example:

Internet Authorizations has been populated in the current year.

You want to clear the field for 8th graders at the middle school who are rolling to 9th grade at the high school.

If you select Clear Value on this property, the value will be cleared for the Student record in all years – current, past, and the New Year when the option set is executed.

The process will also look at the grades and schools selected on for the option set.

A better way to achieve this would be to:

Not include the Internet Authorization on the Student properties tab; letting the current values roll to the new year.

After the Current Year has ended:

Log in to the new year and the high school.

From Synergy SIS>Grading>Year End Status Update>Student Related Property Update tab; select Internet Authorization in the Student Properties grid using the Chooser (this is the same list as is available on the Student Properties tab).

The procedure on this screen is school specific, with the ability to filter by grade.

Select 9th grade in the Grades to Process Filter Criteria.

Check Clear Existing Value.

Click Mass Update Properties.

Values will be cleared for all 9th grade students at the High School for all years.

This method will leave the current year values intact for the current year when they are likely to be needed, and allow you to clear them for the new year after the current year has ended.

The procedure on this screen is school specific, with the ability to filter by grade.

Year End Status Update

Year End Status Update **Student Related Property Update**

Any changes made will be applied to Student Business Object properties and cannot be undone once updated. This process will only affect students based on the current focus.

Mass Update Properties

Filter Criteria

Grades To Process

09 10 11 12

Student Properties

×	Line	Property	Clear Existing Value	Value
<input type="checkbox"/>		Internet Authorization (Student)	<input checked="" type="checkbox"/>	

Figure 12 Year End Status Update Screen Student Property Update Tab

IDENTIFY CODE

Identify the Enter Code to be used during the NYR process

The new school year also tends to be a time where many changes are implemented. Will the changes for the new school year require changes to the configuration in Synergy SIS or Synergy SE? Check for any code changes such as:

- Grading Comments
- Attendance Codes
- Disposition Setup Codes
- Discipline Codes
- Incident Codes
- Conference Codes
- Consider any state requirements concerning certain grade levels and enrollment codes.

DISTRICT AND SCHOOL CALENDARS

Before starting the New Year Rollover process, gather the following information for the new school year:

- The start and end dates for the District Calendar and any district holiday or vacation days.
- The start and end dates for each School Calendar, if different from the District Calendar and any school-specific holiday or vacation days.
- The start and end dates for the District and School Reporting Periods.
- The start and end dates for the District and School Grade Reporting Periods.
- The start and end dates for the School Terms.
- If the school uses tracks, the start and end dates for the Reporting Periods, Grade Reporting Periods, and Terms for each track.

ADDRESS GRID DEFINITION

If the schools will use the student's home address (as entered in the Student screen) to assign the next 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 type of school (elementary, junior high and senior high), and can be used to determine the school assignment for new enrollments as well. 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**.

Instructions for defining the grid codes can be found in the *Synergy SIS - Student Information Administrator Guide*. All grid codes must be updated or added prior to starting the New Year Rollover.

1. Go to **Synergy SIS > System > Setup > Address Grid Definition**.

Line	Street Segment	Increment	Odd / Even	Use Street Type
1	1440 - 1780 101st W 4th Av	5		<input checked="" type="checkbox"/>
2	3211 - 3575 N 82nd St	0	Odd Street Numbers On	<input checked="" type="checkbox"/>
3	1500 - 2000 Moulton Parkway	1		<input checked="" type="checkbox"/>
4	1900 - 2500 S Val Vista Dr	1		<input checked="" type="checkbox"/>

Figure 13 Address Grid Definition Screen

2. Verify **Address Grid Definition** is set up correctly.
3. Correct invalid grid codes prior to mass assigning next grade and school – students with invalid grid codes will not be included in the process.
4. NYR401 Boundary Exception Students report can be run to list students with invalid grid codes.

SYSTEM PREPARATION

To prepare the systems for the New Year Rollover:

1. **Backup** the database before running any processes.
2. Set the **Maximum Single Job Execution Time** on the RT Process Service Setup to 300 minutes. The RT Process Service program is generally found under the All Programs menu in the Edupoint folder on the server running the RT Process Service program.
3. Click **OK**.

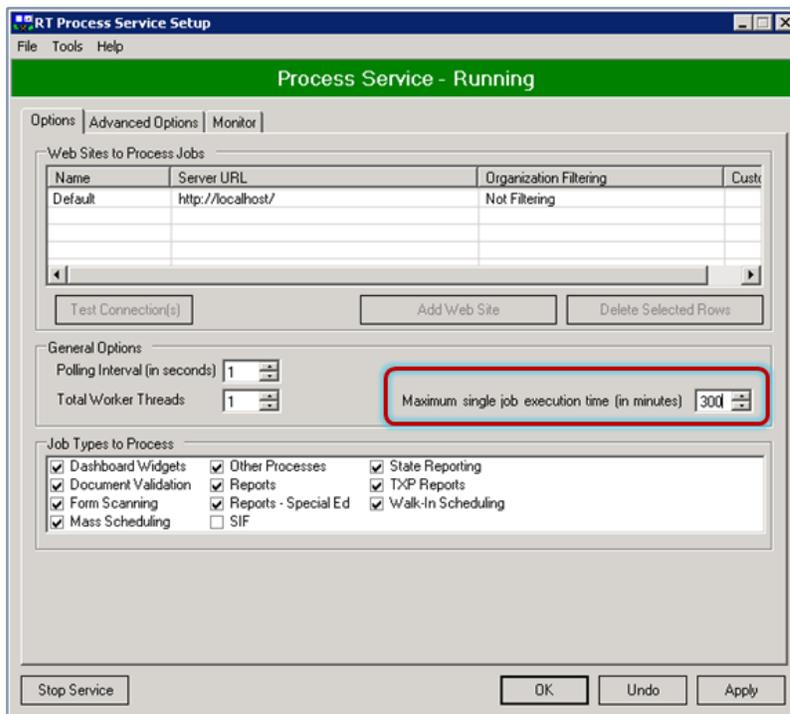


Figure 14 RT Process Service Setup

4. On the server running the RT Process Service that will be used for the New Year Rollover Process, clear all of the Event Viewer logs for the **RTServiceLog**. Since the rollover process generates many logs, this makes it easier to diagnose any problems with the rollover process.

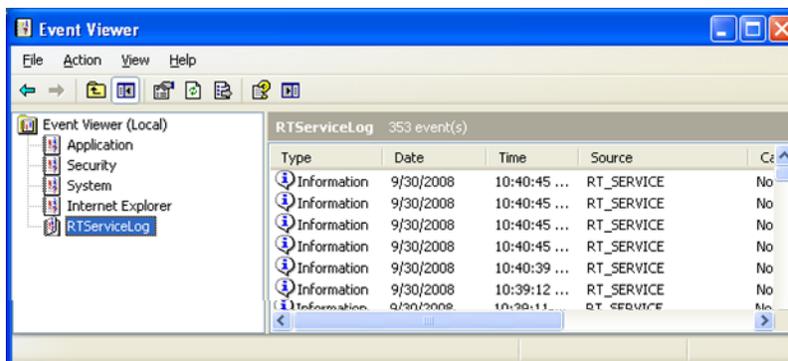
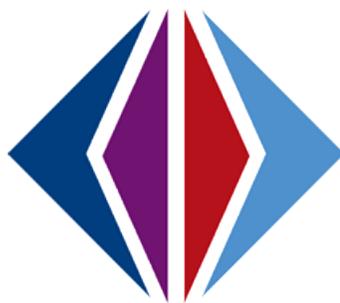


Figure 15 Event Viewer Screen RTService Log



Step Two: SETUP PROCESS SETS

Creating groups or sets of process configuration files makes the New Year Rollover accurate and efficient.

DEFINING NYR PROCESS SETS

A NYR Process Set (also referred to as a Process Definition or Option Set) saves all of the configuration information for the schools and steps to be run by the process. At least one set must be created. A single set could be used, changing the settings and saving them before the process is run for each step. However, it is easier to create a separate set for each step of the process to be run. The settings can then be saved once and used again year after year.

Creating several sets increases the efficiency of the overall process and makes it easier to analyze the results. Breaking the process down into smaller groups also reduces the time needed to run each individual set. This prevents the process from timing out and creates a smaller log file. A smaller log file is easier to review for errors, which is helpful in large school districts.

It is recommended to break down some of the steps by school. Processing types of schools separately may be needed since elementary schools may need a different setup than a high school. It is recommended to create a separate set for elementary, junior high/middle schools, and high schools.

Sets could even be separated further by creating separate sets for certain grade levels. For example, the last grade level in a school (such as grade 6 in an elementary school) needs a different configuration than the rest of the grades when assigning the next school using the school override function.

Before creating the sets in Synergy SIS or Synergy SE, write down the different sets to be created with the schools to be addressed in each set, the grades covered and the step that it will be processed. This ensures that all steps are covered and no school is missed. It also outlines the order in which the different sets will be run.

Create and process the following process sets in the order listed below.

- 1. Process Configuration Sets**

The copying and creation of configuration files for the new school year

- 2. Calendars**

Creation of district and school attendance calendars

- 3. Current Year Mass Assignment**

Assignment of next grade and school assignment to students

- 4. Process Students**

Rolling students to the new school year

When many sets are created, it is helpful to preface the name of the set with its order number. The following displays some possible NYR Process Sets.

Example 1:

- A1 – District Configuration*
- A2 – School Setup Configuration*
- A3 – Additional School Configuration – Elementary*
- A4 – Additional School Configuration – Secondary*
- B1 – Calendar*
- C1 – Mass Assign Elementary KG - 05*
- C2 – Mass Assign Elementary 6th Grade*
- C3 – Mass Assign Secondary*
- D1 – Process Elementary*
- D2 – Process Secondary*
- D3 – Process PS*

In this example, a set prefaced with A is a Configuration Process Set; B is a Calendar set, and so on.

Example 2:

- 1 District Configuration
- 2 School Setup Configuration
 - 2-a Elementary
 - 2-b Middle School
 - 2-c High School
- 3 School Configuration
- 4 Calendar
- 5 Next Grade / School
 - 5-a Elementary School – High Grade
 - 5-b Elementary School – Low Grade
 - 5-c Middle School – High Grade
 - 5-d Middle School – High Grade
 - 5-e High School
- 6 Process Students
 - 6-a Elementary School
 - 6-b Middle School
 - 6-c High School

In example 2, sets have been broken down to smaller sets that are more manageable.

Example 3:

- Step 1 - District Configuration
- Step 2 - School Setup Configuration
- Step 3 - School Configuration
- Step 4 - Calendar
- Step 5a - Next Grade/School – Promote to New School
- Step 5b - Next Grade/School – Promote to Same School
- Step 6 - Process Students

In example 3, sets have been broken down to separate students promoting to new school and those promoting to same school

Although each example above is different, they each have the underlying order of sets:

- 1. Process Configuration Files**
- 2. Calendars**
- 3. Current Year Mass Assignments**
- 4. Process Students**

NAVIGATE TO THE NEW YEAR ROLLOVER SETUP SCREEN



Figure 16 Synergy Navigation Tree

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

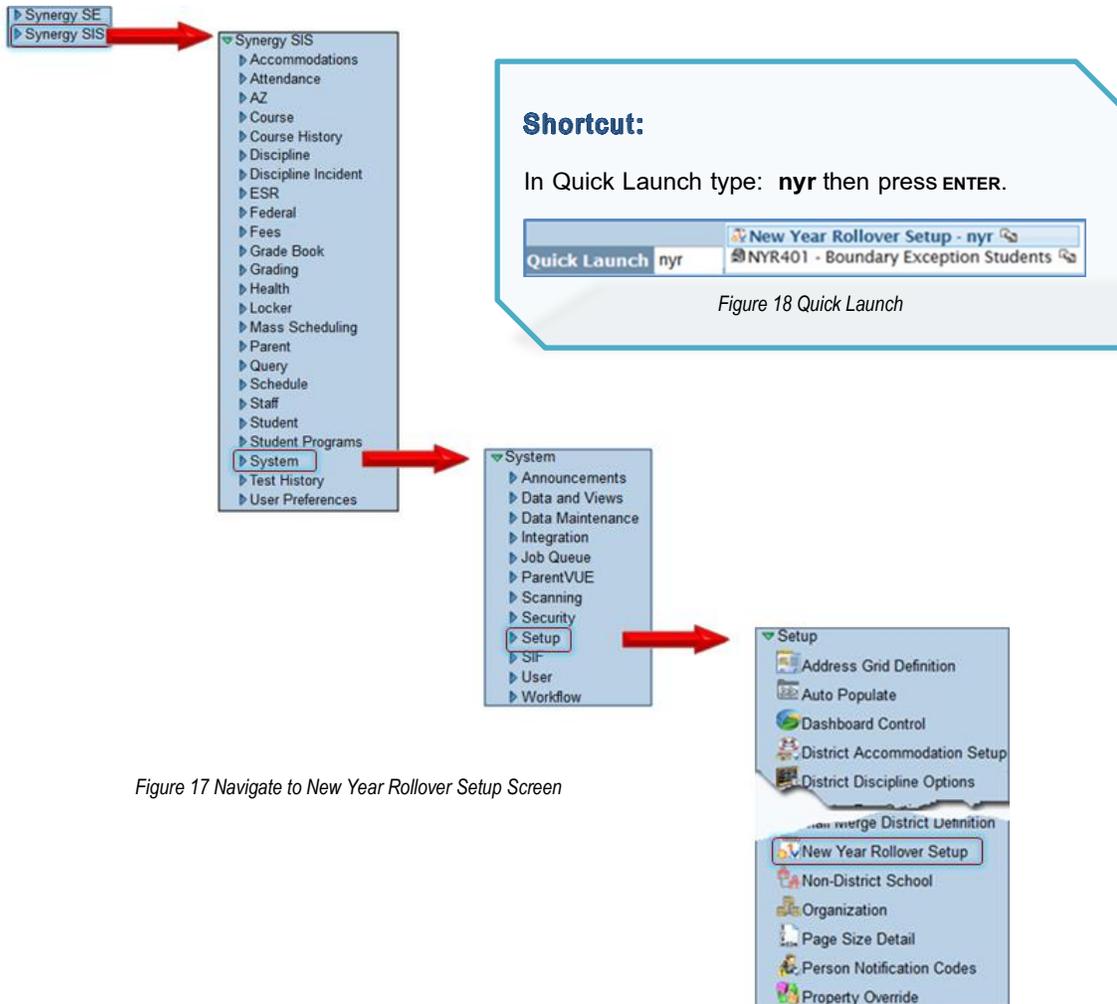


Figure 17 Navigate to New Year Rollover Setup Screen

4. Click on the **New Year Rollover Setup** screen.
5. Make sure the focus is set to a **school** and the **current school year**.

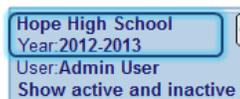


Figure 19 Focus

CREATE PROCESS SETS

1. Click **Add** at the top of the screen. The New Year Rollover Setup Add screen opens.
2. Enter a **Name** that reflects the process set being defined.

Figure 20 New Year Rollover Setup Add Screen

3. Click the **Year Type** drop-down and select.
4. Click **Save**. The screen closes and the information displays.

Execute Tab

5. Leave **Suppress Detail** unchecked to provide more detailed information on the History tab. This is helpful if troubleshooting is required.

Figure 21 New Year Rollover Setup Screen

6. Click **Rollover Type** drop-down and select.
7. Click **Save**.
8. Continue setup by selecting the specific process set link below or as listed in the Table of Contents.

[Process Configuration Sets](#)

The copying and creation of files for the new school year

[Calendar Sets](#)

Creation of district and school attendance calendars

[Current Year Mass Assignment Sets](#)

Assignment of next grade and school assignment to students

[Process Students Sets](#)

Rolling students to the new school year

DUPLICATE PROCESS SETS

Use the Duplicate New Year Rollover menu option to copy a process set and eliminate having to re-create data for each process definition needed.

1. Make sure the focus is set to a school for the current year.
2. Select the process set to duplicate. It should display in the Name field.

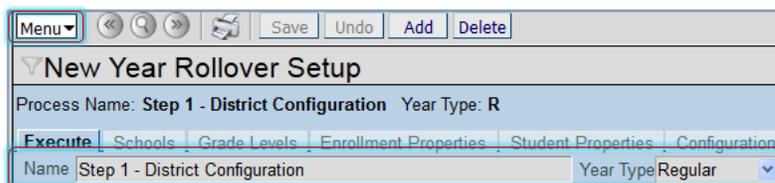


Figure 22 New Year Rollover Setup Screen

3. Click on **Menu** at the top left of the New Year Rollover Setup screen.

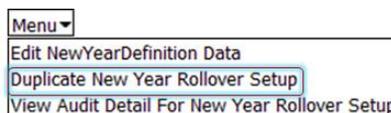


Figure 23 New Year Rollover Setup Screen Menu

4. Select **Duplicate New Year Rollover Setup**. The Duplicate New Year Rollover Setup screen displays.

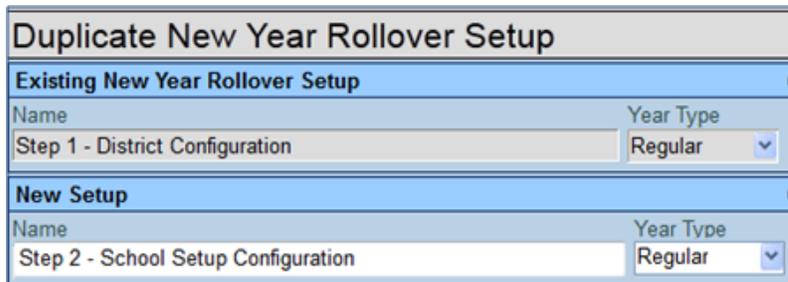


Figure 24 Duplicate New Year Rollover Setup Screen

5. Enter **Name**. In the example, the next set is called, **Step 2 - School Setup Configuration**
6. Select **Year Type**. In this example, all **Year Types** are **Regular**.
7. Check the tabs to include.
8. Click **OK**. The duplicate New Year Rollover Setup screen closes and the new definition displays.
9. Select the specific process set, either from link below or as listed in the Table of Contents, to finish creating the new set.

[Process Configuration Sets](#)

The copying and creation of files for the new school year

[Calendar Sets](#)

Creation of district and school attendance calendars

[Current Year Mass Assignment Sets](#)

Assignment of next grade and school assignment to students

[Process Students Sets](#)

Rolling students to the new school year

PROCESS CONFIGURATION SETS

This process copies the configuration files to the new year, reducing the time needed to set up the new year as most configurations are the same from year to year. Once copied to the new year, the setup information can be modified as needed. If a specific configuration will be dramatically different in the new year, it would make sense not to include it in the process.

If a file is selected on the Configuration tab that has not been set up in the current year it will be created as a blank in the next year.

In order to ensure the configuration files process in the desired sequence, it is recommended to break the configuration process into multiple steps.

1. District file types
2. School Setup file types
3. Additional School file types

(Student File types are to be included on the process student set)

In order to ensure that configuration files process in the desired sequence, it is recommended to create multiple process configuration sets grouped by the file types listed below.

1. District configuration file types
2. School Setup configuration file types
3. Additional School configuration file types

(Student file types are to be included on the Process Student set)

Execute Tab

1. Check **Process Configuration Files**.

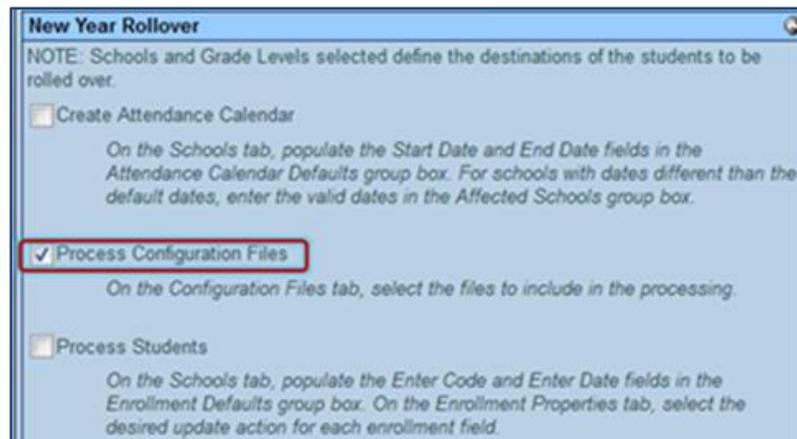


Figure 25 New Year Rollover Setup Screen Execute Tab

2. Click **Save**.

Schools Tab

1. Complete the **Calendar Types** grid with the **Default Calendar Dates** and **Enrollment Defaults**.

The screenshot shows the 'New Year Rollover Setup' application window. The 'Schools' tab is active. The 'Calendar Types' grid is highlighted with a red box. Below it, the 'Affected Schools' grid is also highlighted with a red box, showing a 'Chooser' button for each row.

Line	Calendar Type	Default Calendar Dates		Enrollment Defaults	
		Start Date	End Date	Enter Code	Enter Date
1	Regular	08/19/2013	05/28/2014	E4	08/20/2013

Line	School Name	Start Date	End Date	Enter Code	Enter Date	Live In Synergy	School Override	Calendar Type
	Adams Elementary					<input checked="" type="checkbox"/>	+	Regular
	Truman Middle School					<input checked="" type="checkbox"/>	+	Regular
	Hope High School					<input checked="" type="checkbox"/>	+	Regular

Figure 26 New Year Rollover Screen Schools Tab

2. Using **Chooser**, select all **Live In SYNERGY SIS Schools** within the **Affected Schools** grid.
3. Complete the calendar dates for each school *if they are different* than the district calendar dates.
4. Select **Regular** for the **Calendar Type** for each school. See: Shortcut right
5. Click **Save**.



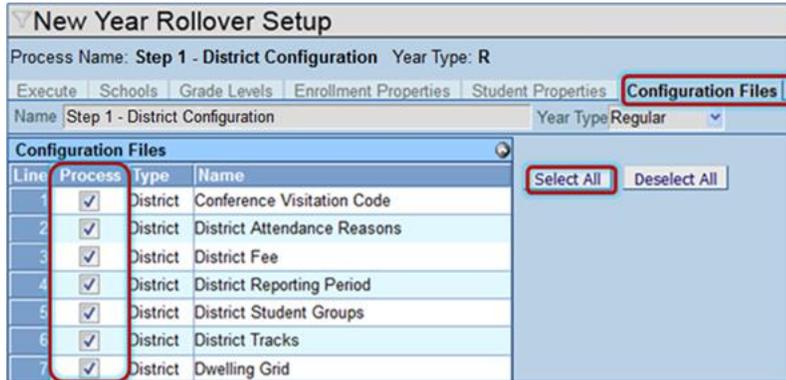
Shortcut:

For the first school added to the Affected Schools grid, use the drop down menu to select Regular. Then hold down **Ctrl** (on your keyboard) and click

Chooser:

Click **Chooser**. In the window that opens, click **Find**. A complete list of items (schools, staff, etc.) display. To move all of them to the right side of the screen, click **Add All Row(s)**. Alternatively, double-click individual items to add them. Click **Select**.

Configuration Files Tab

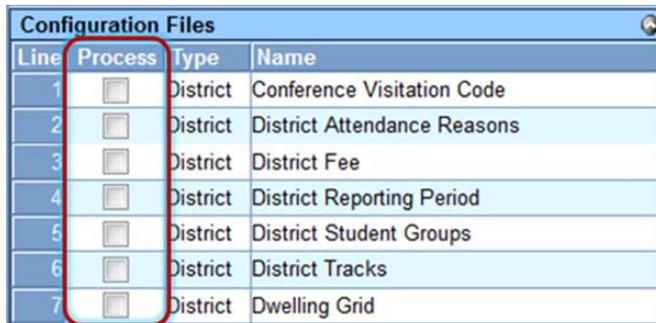


TIP! If additional sets are needed for this NYR process, this set can be duplicated. A duplicated set can then be edited.

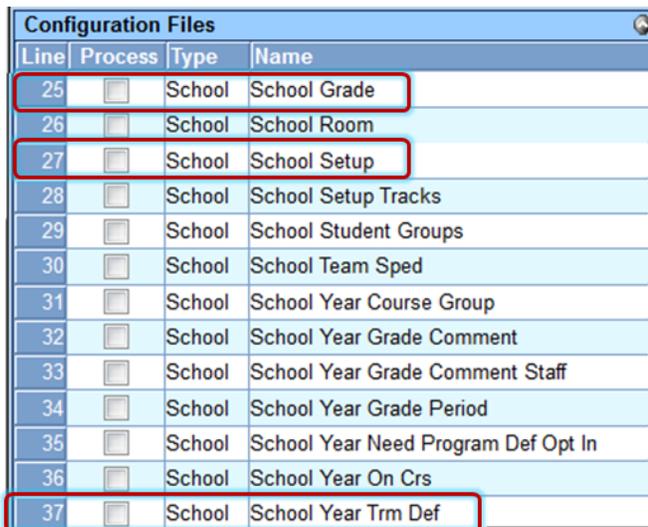
Figure 27 New Year Rollover Setup Screen Configurations Tab

6. Check the file types applicable, a guide follows below.
7. Click **Save**.

Congratulations! You have completed the procedure for creating a Process Configuration Set.



District Configuration Set:
Select only District File types determined applicable to your district.



School Setup Configuration Set:
Select:
School Setup
School Grade
School Year Trm Def.
NOTE: Select School Setup Tracks only if the school is using tracks.

Configuration Files			
Line	Process	Type	Name
13	<input type="checkbox"/>	School	Attend Extract Fields
14	<input type="checkbox"/>	School	Course School
15	<input type="checkbox"/>	School	Discipline Rollover
16	<input type="checkbox"/>	School	Grade Rollover
17	<input type="checkbox"/>	School	Honor Roll Def
18	<input type="checkbox"/>	School	House
19	<input type="checkbox"/>	School	Locker
20	<input type="checkbox"/>	School	Mail Merge Rollover
21	<input type="checkbox"/>	School	Sched Mass Assign

School Configuration Set:

Select only School File types determined applicable to your district/school.

Figure 28 New Year Rollover Setup Screen Configurations Tab Configuration Files Grid

NOTE: Some configuration files need to be treated differently for special situations.

District: Grid	Schools that use a grid-based assignment for the next school assignment, must include this in the District Configuration set.
District: Dwelling Grid	Minnesota State, only
School: School Team SPED	Synergy SE, only
School: Section	Generally, this file is not included for high schools since sections are created during the Mass Scheduling process for the next school year.
Student: WebMethods NYR Process UI	Virginia State, only
Student: Student Group	Needs to be included in a process student set
Student: Student Locker	Needs to be included in a process student set

CALENDAR SETS

The next step in the rollover process is to create the district and school calendars. The calendars will be created based on the dates defined in the New Year Rollover Setup screen. After the calendars have been created in the new year, the holidays and vacation days will need to be manually added and any special calendars such as 4-day week calendars created in the new year.

NOTE: Calendar detail does not need to be completed in order to continue with the NYR process.

Execute Tab

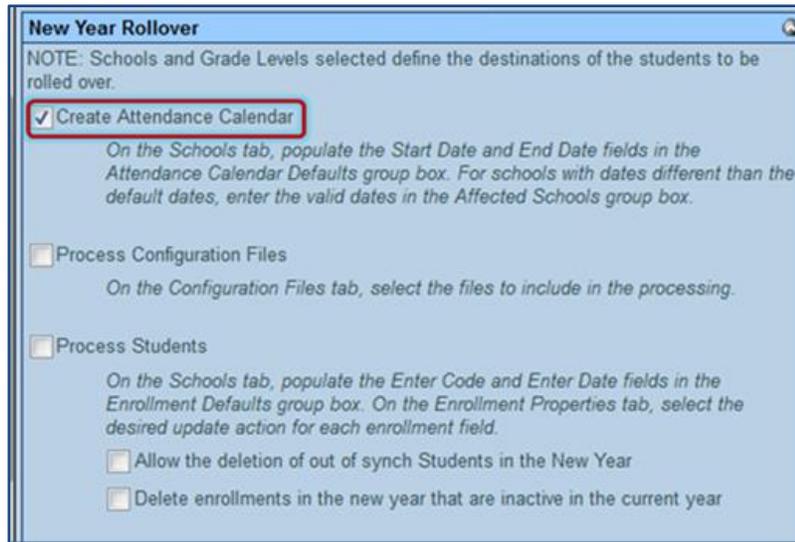


Figure 29 New Year Rollover Setup Screen Execute Tab

1. Check **Create Attendance Calendar**
2. Click **Save**.

Schools Tab

3. Complete the **Calendar Types** grid with the **Default Calendar Dates** and **Enrollment Defaults**.

IMPORTANT: The District Calendar default start and end dates must encompass all of the school start and end dates.

4. Using **Chooser**, select all **Live In SYNERGY SIS Schools** within the **Affected Schools** grid.
5. Complete the calendar dates for each school *if they are different* than the District Calendar dates.

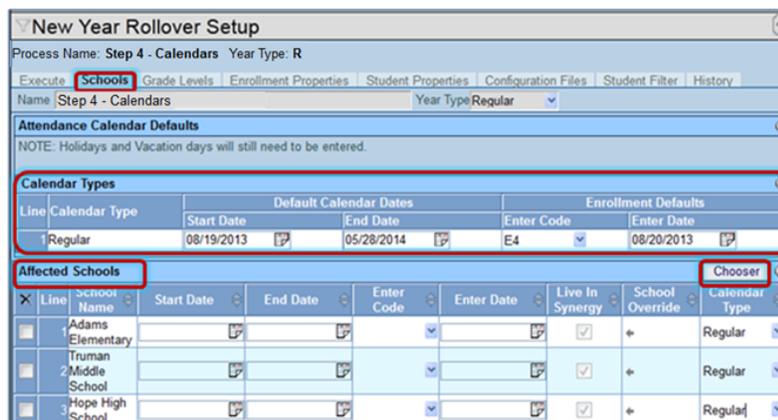


Figure 30 New Year Rollover Setup Screen Schools Tab

6. Select **Regular** for the **Calendar Type** for each school.
7. Click **Save**.

Congratulations! You have completed the procedure for creating a Calendar Set.

CURRENT YEAR MASS ASSIGNMENT SETS

This step populates the next grade and next school fields on the Other Info tab on the Student screen to enable the Process Student option sets to roll the students into the correct grade and school in the next year.

The Current Year Mass Assignment will be processed in multiple steps dependent on the district's school/grade setup.

SCHOOLS USING GRID CODE ASSIGNMENT

Grades that transfer to a different school (such as 6th grade or 8th grade) do **not** need to be run separately. Grid-based assignments use the schools assigned to each grid code as setup in the Grid Code Definition.

SCHOOLS USING SCHOOL BASED ASSIGNMENT (SCHOOL OVERRIDE)

Students are assigned to the school indicated on the Schools tab of the New Year Rollover Setup screen. Since only one "next" school can be assigned to a given school, the grades where students transfer to a different school such as 6th grade or 8th grade need to be processed separately so a different school can be assigned. For the grades not transferring to a different school, they are assigned the same school in which they are currently enrolled.

NOTE: After the assignments have been made, the next grade and school assignments can be manually corrected and overridden by editing the values on the **Other Info** tab of the **Student screen** for each student. For example, some students may attend a magnet or vocational school for high school instead of a geographically-assigned high school.

CAUTION: If using **Synergy SE** as a stand-alone product with a third-party student information system (SIS), do NOT check the box labeled Override Existing. The information already existing in these fields may have been inserted by the other SIS and should not be overridden by the New Year Rollover process.

Execute Tab

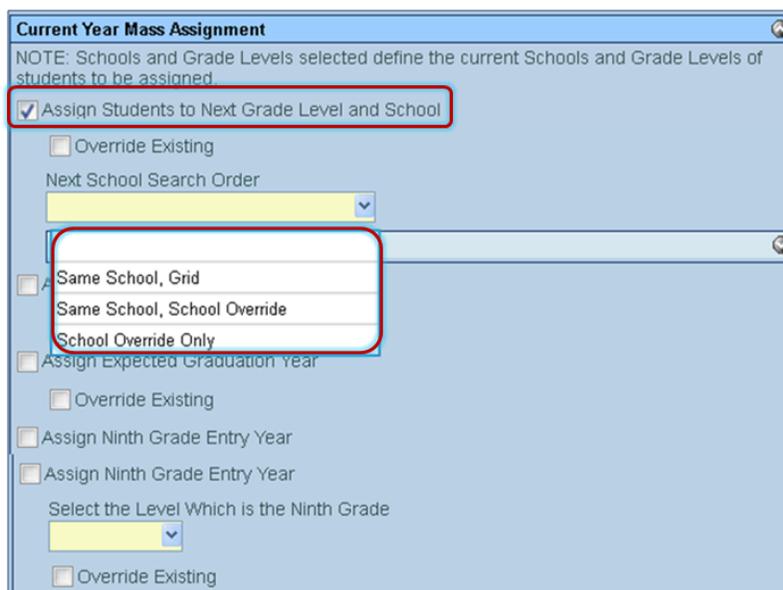


Figure 31 New Year Rollover Setup Screen Execute Tab

1. Check Assign Students to Next Grade Level and School.
2. To overwrite any existing data in the Next Grade and Next School fields on the Other Info tab of the Student screen, check **Override Existing**. For the initial run of the year, this is recommended to ensure any data entry mistakes are cleared out. After any manual corrections have been made, be sure to uncheck this box.

IMPORTANT: *Do not* check this box if retentions have been entered, as that data will be overwritten.

3. Determine how the next school will be assigned and select an option from the **Next School Search Order** drop-down.
 - a. **Same School, Grid** will assign the student to the same school in which they are currently enrolled if the next grade level is available, and if the next grade level is not available it will assign them a next school based on the grid.
 - b. **Same School, School Override** will assign the student to the same school in which they are currently enrolled if the next grade level is available, and if the next grade level is not available it will assign them a next school based on the school listed in the School Override column for their current school on the Schools tab.
 - c. **School Override Only** will assign them a next school based on the school listed in the School Override column for their current school on the Schools tab. School Override Only is primarily used for district changes such as a school closing or change in grade levels available at a school.
4. (Optional) To assign an expected graduation year based on the Grade Setup configuration in the District Setup screen, check **Assign Expected Graduation Year**. To replace the existing data in the field, check the **Override Existing**.

NOTE: The **Year End Status Update** screen, found under Synergy SIS > Grading is recommended for use in updating a student's year end status.

5. Click **Save**.

Schools Tab

1. Complete the Calendar Types grid with the Default Calendar Dates and Enrollment Defaults.
2. Using **Chooser**, select all **Live In SYNERGY SIS Schools** within the **Affected Schools** grid.
3. Complete the calendar dates for each school *if they are different* than the district calendar dates.

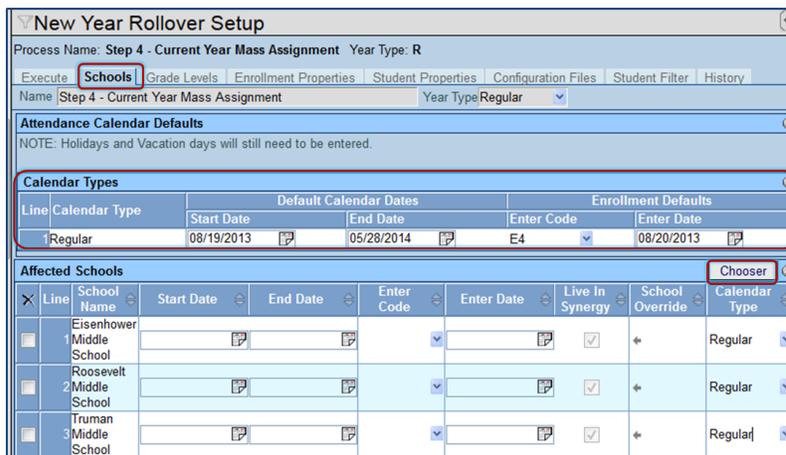


Figure 32 New Year Rollover Setup Screen Schools Tab

4. Select **Regular** for the **Calendar Type** for each school.
5. If using a school-based assignment:

Schools Using Grid Code Assignment

6. No other setup is needed on this tab.

Schools Using School Based Assignment (School Override)

6. If the students are all rolling to the same school, you can leave the school override field blank. If students are rolling to a different school (for example 6th grade at the Elementary to 7th grade at the Middle) you will want to select the appropriate school by clicking ← in the **School Override** field.
7. Click **Save**.

Grade Levels Tab

1. Select the grade levels to be processed with this specific definition/set. If using school-based assignment, make sure the grade selections match the next schools set up on the Schools tab.
2. Click **Save**. Grades selected move to the top of the list.

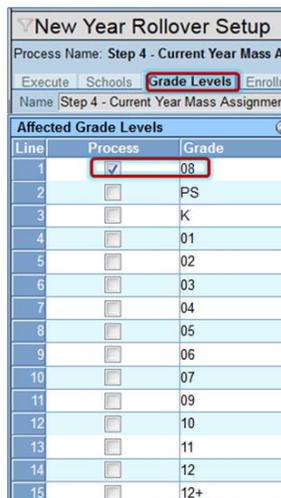


Figure 33 New Year Rollover Setup Screen Grade Levels Tab

IMPORTANT: At this point, make any adjustments to the next grade level and next school for retained students. Also change the next school for students who are attending a different school than the standard next school, such as a magnet or vocation school. The Move Students to New Year process should not be run until this information has been corrected.

SYNERGY SE

To print a list of student next grade and next school values for review, run the following query:

```
K12.SpecialEd.Student R0, K12.School R1 (OrganizationGU,R0.OrganizationID,Outer)
COLS R0.LastName, R0.FirstName, R0.Grade, R0.OrganizationID (,Hide),
R1.OrganizationName, R0.NextGradeLevel, R0.NextSchoolGU
```

Congratulations! You have completed the procedure for creating a Current Year Mass Assignment Set.

Using (Find Foreign Key):

Click . A Find: screen opens. Enter all or part of the information in any white field. Click **Find** to see a list matching criteria entered. Double click the line with the match. The screen closes and the selection displays.

Example:

Current Year Mass Assignment Execute Tab

NOTE: Schools and Grade Levels selected define the current Schools and Grade Levels of students to be assigned.

Assign Students to Next Grade Level and School

Override Existing

Next School Search Order
School Override Only

Next School Search Order Help

Schools Tab

Line	School Name	Start Date	End Date	Enter Code	Enter Date	Live in Synergy	School Override	Calendar Type
1	Eisenhower Middle School					<input checked="" type="checkbox"/>	Hope High School	Regular
2	Roosevelt Middle School					<input checked="" type="checkbox"/>	Kennedy High School	Regular
3	Truman Middle School					<input checked="" type="checkbox"/>	Nixon High School	Regular

Process looks at Schools tab for the school selected in School Override.

8th grade students at the Middle Schools selected on the Affected Schools grid are assigned a Next Grade level of 09 and a Next School consistent with the High School selected in the School Override field on the Schools tab

Affected Grade Levels Grade Levels Tab

Line	Process	Grade
1	<input checked="" type="checkbox"/>	08
2	<input type="checkbox"/>	PS
3	<input type="checkbox"/>	K
4	<input type="checkbox"/>	01
5	<input type="checkbox"/>	02
6	<input type="checkbox"/>	03
7	<input type="checkbox"/>	04
8	<input type="checkbox"/>	05
9	<input type="checkbox"/>	06
10	<input type="checkbox"/>	07
11	<input type="checkbox"/>	09
12	<input type="checkbox"/>	10
13	<input type="checkbox"/>	11
14	<input type="checkbox"/>	12
15	<input type="checkbox"/>	12+

Student

Student Name: **Abbott, Andrew E.** School: **Eisenhower Middle School** Teacher: **O'Malley, Tim P**

Demographics Other Info Parent/Guardian Emergency Enrollment Enrollment History Cl

Last Name	First Name	Middle Name	Suffix	Perm ID
Abbott	Andrew	Edward		124013

Grade 08 CSIS ID 0002402752 Idea Cur Level

School Information

Other Information

Enrollment Restrictions and Exceptions

Next Year

Year End Status Next Grade Level 09 Next School Hope High School

In this scenario, Andrew Abbott, at Eisenhower Middle School, is assigned a Next Grade Level of 09. His Next School is Hope High School.

Figure 35 New Year Rollover Setup Screen Execute, Schools, Grade Levels Tabs

Figure 34 Student Screen Other Info Tab

PROCESS STUDENTS SETS

This set enrolls the returning students into the next year (based on the Next Grade Level and Next School assignments on the Other Info tab of the Student screen). The process may be run multiple times if needed. It does not enroll the student twice in the new year if run twice.

Reasons for using different definitions for this process are:

Enter Codes – if different groups of students require a different enter code when enrolled in the new year; for example 6th grade or 8th grade students transfer to their new school, some states require a different enter code than students promoted within the same school. Only one enter code can be specified by school.

Enrollment Properties – if different groups of students require different enrollment property definition.

Amount of Data – by creating smaller groups of students to process, the log files are smaller and easier to review for errors. It is recommended to process no more than 10 schools at a time.

Important things to consider when setting up the Process Students definition:

Students are processed based on the Next Grade and Next School Assignments

The Student Filter Type on the Execute tab works in conjunction with:

Schools selected on the Schools tab

Grades selected on the Grade levels tab

Enrollment Properties tab selections are year specific, once processed cannot be undone or updated with subsequent processing.

Student Properties tab selections are student specific, not year specific. If cleared, all years will be cleared.

IMPORTANT: If rolling Student Lockers or Student Groups, the configuration files on the Configuration Files tab must be included with the Process Student definition. Process Configuration Files must be checked on the Execute tab.

Execute Tab

1. Check **Process Configuration Files**, if you have selected Student Lockers or Student Groups on the Configuration Files tab.
2. Check **Process Students**.

IMPORTANT: Do not check **Allow the deletion of out of synch Students in the New Year** or **Delete enrollments in the new year that are inactive in the current year** the first time students are processed.

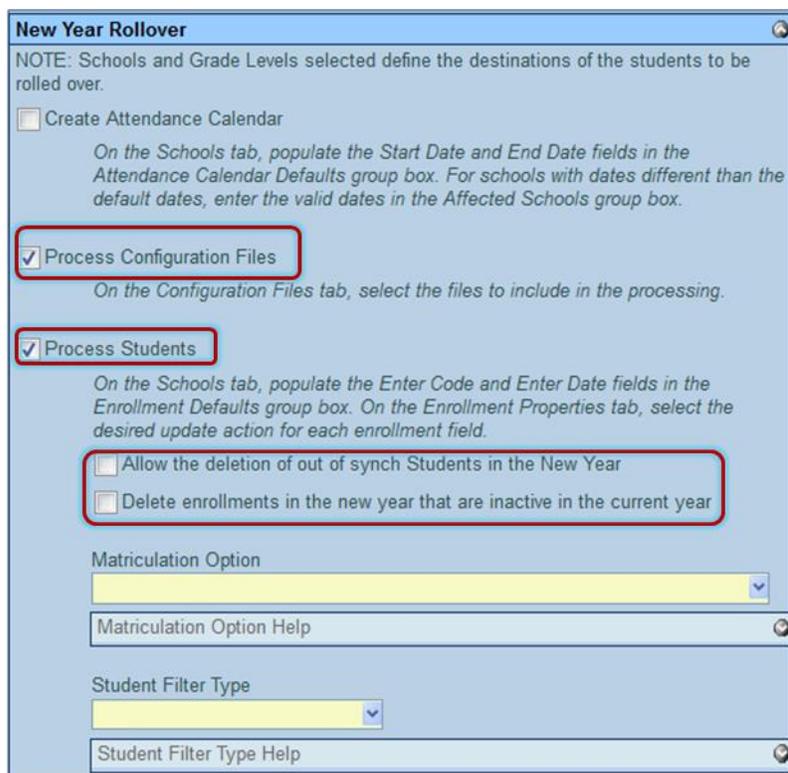


Figure 36 New Year Rollover Setup Screen Execute Tab

3. **Allow the deletion of out of synch Students in the New Year** is a powerful option, and should not be included with any set unless you are absolutely sure you want to do so. This option can potentially undo valid changes made to student enrollments in the next year.

If this box is checked, the process will re-roll students to a school or grade based on the next grade and next school data in the current year. All students who have been moved or updated in the new year are fair game – so use with caution so as to not undo somebody's hard work moving students based on a program change, or retentions.

4. **Delete enrollments in the new year that are inactive in the current year** is used to do exactly that. This is especially helpful to check during the final NYR process after the current school year has ended.
5. **Matriculation Option** – there are two options in the drop-down:

(Default) Only rollover students that have the next grade and next school set – Recommended

OR

Determine the next grade and next school during the rollover where values are blank. This option will assign a next grade and school to any student that does not have those fields populated in the current year. The next grade and school assigned to these students is the next grade level at the current school.

6. **Student Filter Type** – there are two options available. This filter type is used along with the Schools tab and the Grade Levels Tab

Next Year Grade and School – think of this option as a 'Pull'. The system will look at the next grade and next school fields on the Other Info tab of the Student Screen to determine which students to process. If you want to process students who have a next grade of 09, you will need to have grade level 09 selected on the Grade Levels tab. The same holds true for the Next School selected and the schools selected on the Schools tab.

OR

Current Year Grade and School – this option is more of a ‘Push’. For example if you want to process your current middle school / 8th grade students into the 9th grade at the high school, you could select this option along with the middle school on the schools tab, and 8th grade on the grade levels tab. The NYR process would then ‘push’ the students from the current year to the new year.

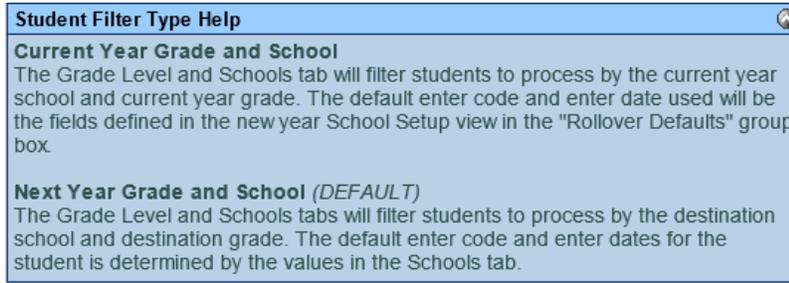


Figure 37 New Year Rollover Setup Screen Execute Tab

Schools Tab

Attendance Calendar Defaults must be populated. Pay particular attention to the Enter Code and Enter Date, as once it has been assigned in the new year, the only way to change it is with a SQL script.

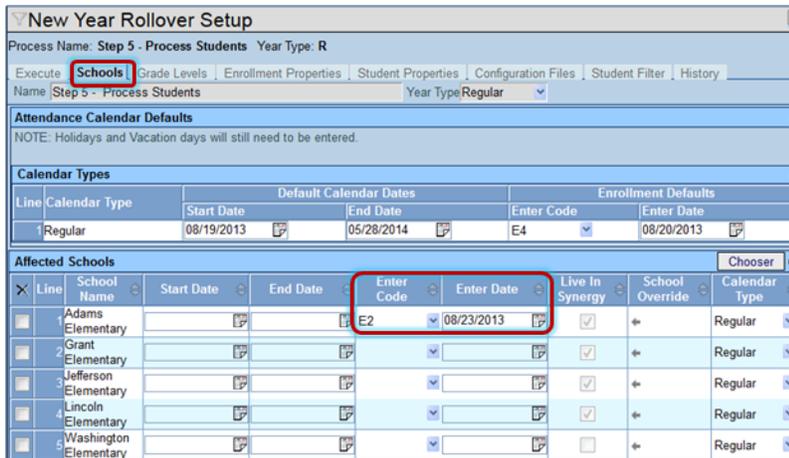


Figure 38 New Year Rollover Setup Screen Schools Tab

1. Select the schools to be processed using the [Chooser](#), according to what you selected in the Student Filter drop-down on the Execute tab.
2. Once schools have been added to the Affected Schools grid, select a Calendar Type, and verify the schools selected are ‘Live in Synergy’
3. If a school has a different Enrollment/ Enter Date or Enter Code than the default value, enter it on the grid

Grade Levels Tab

1. Check the grade levels to be processed by this definition.
2. If you have selected **Next Year Grade and School** in the School Filter on the Execute tab, select the grades that are in the Next Grade and Next School fields on the Other Info tab of the Student Screen.

OR

If you have selected **Current Year Grade and School**, you will need to select the current year grade level you are processing.

Example:

Two different ways to roll 8th grade at the Middle School to 9th grade at the High School.

Next Year Grade and School – ‘Pull’ option

In this scenario, the system will look at the Next Grade Level and Next School to determine which students to roll to the new year.

Student Filter Type Execute Tab
 Next Year Grade and School

Affected Schools Schools Tab

Line	School Name
1	Hope High School
2	Kennedy High School
3	King High School

Affected Grade Levels Grade Levels Tab

Line	Process	Grade
1	<input checked="" type="checkbox"/>	09
2	<input type="checkbox"/>	PS
3	<input type="checkbox"/>	K

Based on the Student Filter Type, the process will:
 Look at the three High Schools selected in the Affected Schools grid of the Schools tab
 Look for students with grade 09 in the Next Grade level field on the Other Info tab of the student screen (as that is what is selected on the Grade Levels tab)
 Roll (Pull) the 9th grade students into the High Schools selected

Current Year Grade and School – ‘Push’ option

In this scenario, the system will look at the current year grade and school to determine which students to roll to the new year.

Student Filter Type Execute Tab
 Current Year Grade and School

Affected Schools Schools Tab

Line	School Name
1	Eisenhower Middle School
2	Roosevelt Middle School
3	Truman Middle School

Affected Grade Levels Grade Levels Tab

Line	Process	Grade
1	<input checked="" type="checkbox"/>	08
2	<input type="checkbox"/>	PS
3	<input type="checkbox"/>	K

Based on the Student Filter Type, the process will:
 Look at the three middle schools selected in the Affected Schools grid of the Schools tab
 Look for students at the selected schools in grade 08
 Roll the Middle School 8th graders to 9th grade in the High Schools selected on the Other Info tab in the Next School field.

Figure 40 New Year Rollover Setup Screen Execute, Schools and Grade Levels Tabs

Enrollment Properties Tab

The Enrollment Properties tab contains student enrollment properties that are school year qualified.

1. Review each property listed in the Enrollment Properties grid.
2. Determine the action to be taken for each property when a student is rolled into the same school or a different school during the NYR process.

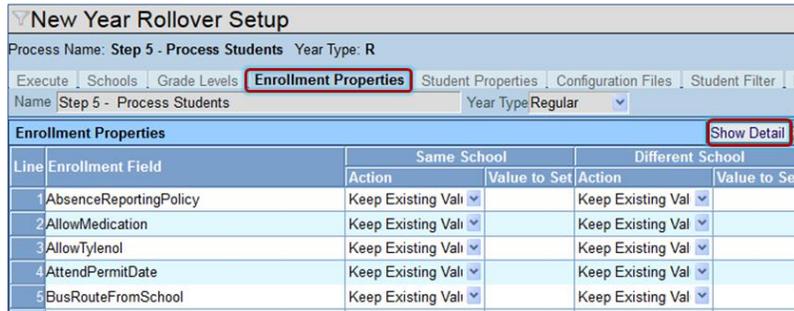


Figure 41 New Year Rollover Setup Screen Enrollment Properties Tab

3. Action options are:

Keep Existing Value

Clear Value

Set Value - If this option is selected, highlight the row and click **Show Detail** to set the new value.

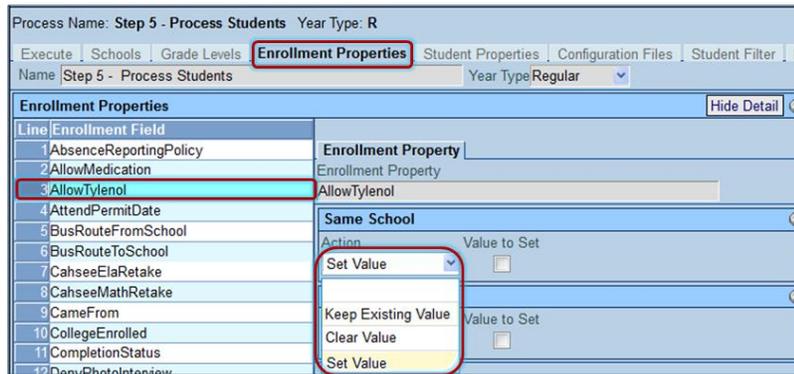


Figure 42 New Year Rollover Setup Screen Enrollment Properties Tab Detailed View

NOTE: Some Enrollment Properties should always be **Clear Value** so that new values are entered in the new year. The following fields should always be **Clear Value**:

Grade Exit Code
Next Grade Level
Next School GU
Next Track GU
No Show Student
Summer Grade Level
Summer School
Summer Withdrawal Reason Code
Summer Withdrawal Code
Summer Withdrawal Date
Year End Status

4. Click **Save** if any changes are made.

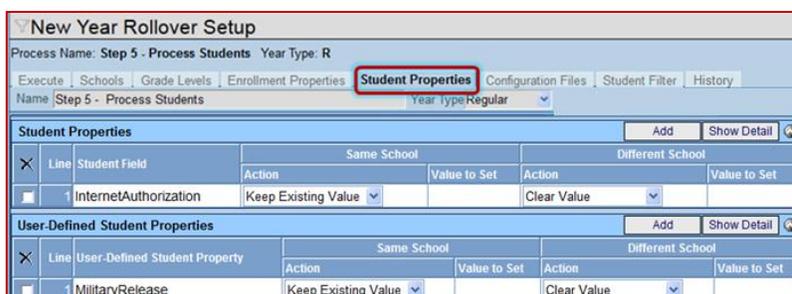
Follow the same instructions for any User-Defined Enrollment Properties.

NOTE: A list of the [Enrollment Properties](#) is available at the end of this guide.

Student Properties Tab

The Student Properties tab determines the behavior of student specific properties during the rollover. It contains two grids Student Properties and User Defined Student Properties (created by the district). These student properties are *not* school year qualified. They remain with the student.

For example, using the example below, if **Clear Value** for Different School for the Internet Authorization and Military Release is selected, the field is cleared for all years for the students who roll to different



schools.

If you do not select any properties in these grids, the existing values will roll with the student.

- You may not want to clear these fields while school is in session for the current year, and you cannot clear the fields with a subsequent rollover.
- Another way to address this need is to clear the field after the current school year has ended by using the Student Related Property Update Tab on the Year End Status Update screen found in Synergy SIS > Grading > Year End Status Update, where the same drop-down is available.

See: [Year End Status Update](#)

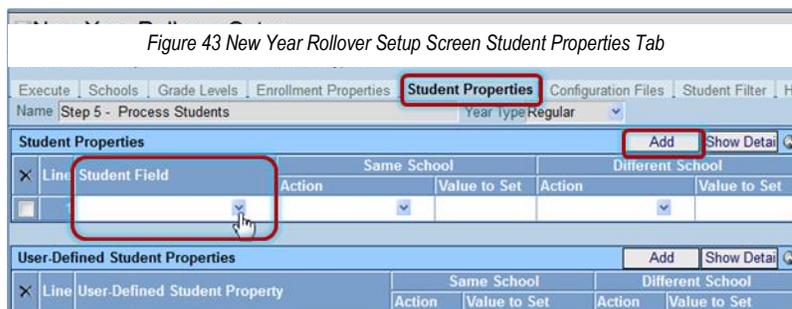


Figure 44 New Year Rollover Setup Screen Student Properties Tab

- Action options are:
 - Keep Existing Value
 - Clear Value
 - Set Value - If this option is selected, highlight the row and click **Show Detail** to set the new value
- Click **Save** if any changes are made.

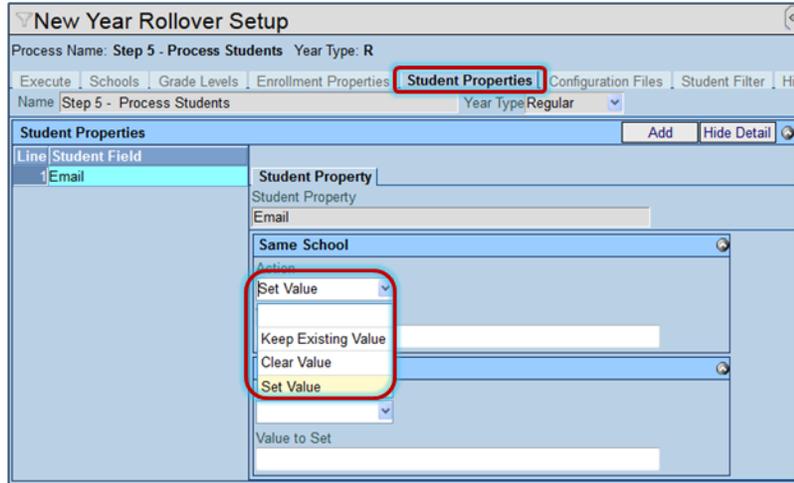


Figure 45 New Year Rollover Setup Screen Student Properties Tab Detailed View

Follow the same instructions for any User-Defined Student Properties.

Configuration Files Tab

If rolling Student Lockers or Student Groups, check **Student Student Group** and/or **Student Student Locker**. (Make sure **Process Configuration Files** on the Execute tab is checked.)

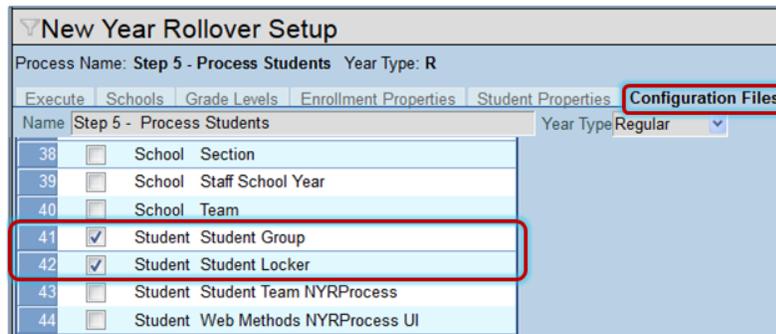


Figure 46 New Year Rollover Setup Screen Configuration Files Tab

Student Filter Tab

This tab is useful when there is a need to process specific students. A user-defined filter is used to narrow down the list of students.

See: [Process Specific Students](#)

Congratulations! You have completed the procedure for creating a Process Student Set.

Step Three: RUNNING THE PROCESS

Running the process sets in the correct order helps to ensure the accuracy of the entire process. It makes it easier to find mistakes because the results can be checked along the way.

ROLLOVER PROCESS INSTRUCTIONS

NOTE: If rolling over schools with sections, especially sections with unassigned staff, it is recommended to disable the option **Enable historical tracking of staff in sections** on the District Setup screen – System tab – Other Options grid. This option can be enabled again when the rollover process is complete.

The screenshot shows the 'Other Options' window with the following settings:

- Discipline Type: Incident
- Incident Violation Display: Entire Violation
- District Group History Filter: All Groups for the Current Year for the Current Sc
- Student Notification: Icon
- Badge Number Update Type: [Empty]
- Disable Unique State Number:
- Allow Negative Seat Totals:
- Enable Announcement Dismissal:
- Enable historical tracking of staff in sections: (highlighted with a red rectangle)
- Auto Assign District Staff To Schools:
- Adult ID Update Type: Auto Generate
- Fee Total Type: Include fees for all organizations and all yr

Figure 47 District Setup Screen System Tab

Process the following process sets *in the order listed below*.

1st - All Process Configuration Files

1. District File Types
2. School Setup File Types
3. Additional School Types
 - Clear cache.
 - Log out. Log back in.

Remember to review the log for each process set on the History tab to confirm data processed and view errors.

Clear Cache

Go to Setup> System Configuration>Options tab. Scroll to System Cache. Click [Clear Cache](#).

2nd - All Calendars

- Clear cache.
- Log out. Log back in.

Remember to review the log for each process set on the History tab to confirm data processed and view errors.

3rd - Current Year Mass Assignment

Remember to review the log for each process set on the History tab to confirm data processed and view errors.

(While this step can be done prior to processing configuration files or creating the calendars it *must be done* prior to processing students)

4th - Process Students

Remember to review the log for each process set on the History tab to confirm data processed and view errors.

REMEMBER: The focus should be set to the current *regular* school year and to any school.

1. From New Year Rollover Setup screen, select the rollover definition
2. Click **Execute New Year Rollover** on the Execute tab.

IMPORTANT: The log files for the Process Students definition may be extremely large. If the log file is over 800 pages, a PDF report of the log file is not generated due to the limitations of the PDF format. To ensure the log file can be viewed when processing large amounts of data, check **Suppress Detail** on the Execute tab before clicking Execute New Year Rollover. This will list only the errors encountered instead of listing the update status of every student. Consider processing fewer schools per definition.

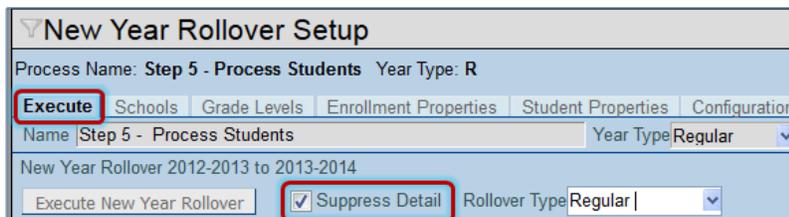


Figure 48 New Year Rollover Setup Screen Execute Tab

RE-PROCESSING STUDENTS AND THE FINAL NYR

Students can be processed as often as is necessary. It is a good idea to run a final rollover after the current school year has ended.

Execute Tab

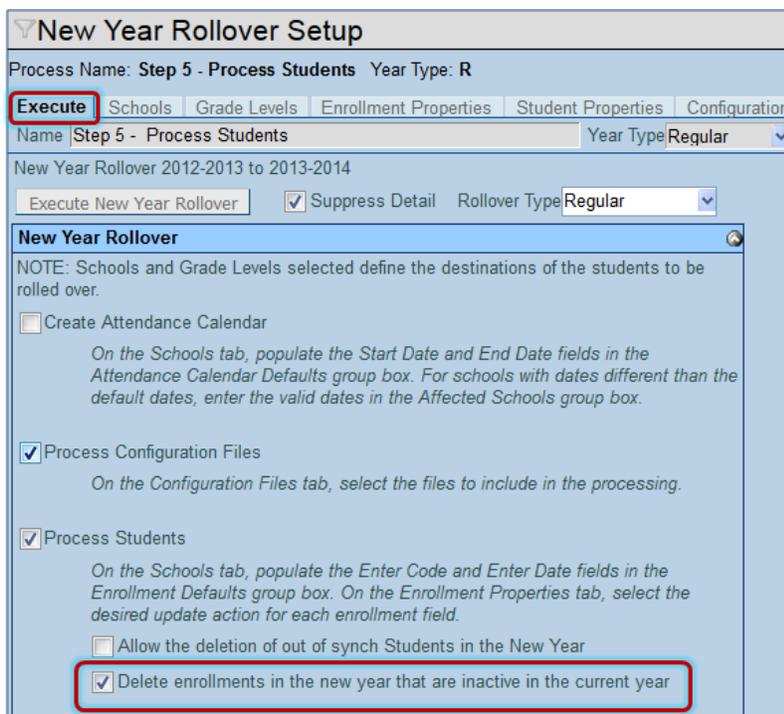


Figure 49 New Year Rollover Setup Screen Execute Tab

1. Check **Delete enrollments in the new year that are inactive in the current year** for the final rollover. This option will delete any students in the new year that have been incorrectly left active when withdrawn in the current year.

CAUTION: Allow the deletion of out of synch Student in the New Year looks at the Next Grade and Next School assignment in the current year, and compares it to the student enrollment in the new year. If there is a difference, it re-enrolls to the values in the current year.

Often there are valid reasons students have been moved after the initial rollover, this would un-do those valid changes.

Process Name: Step 5 - Process Students Year Type: R

Execute Schools Grade Levels Enrollment Properties Student Properties Configuration

Name Step 5 - Process Students Year Type Regular

New Year Rollover 2012-2013 to 2013-2014

Execute New Year Rollover Suppress Detail Rollover Type Regular

New Year Rollover

NOTE: Schools and Grade Levels selected define the destinations of the students to be rolled over.

Create Attendance Calendar
On the Schools tab, populate the Start Date and End Date fields in the Attendance Calendar Defaults group box. For schools with dates different than the default dates, enter the valid dates in the Affected Schools group box.

Process Configuration Files
On the Configuration Files tab, select the files to include in the processing.

Process Students
On the Schools tab, populate the Enter Code and Enter Date fields in the Enrollment Defaults group box. On the Enrollment Properties tab, select the desired update action for each enrollment field.

Allow the deletion of out of synch Students in the New Year

Delete enrollments in the new year that are inactive in the current year

Figure 50 New Year Rollover Setup Screen Execute Tab



Step Four: AFTER THE PROCESS

After completion of the NYR process, a few areas still need to be set up.

POST NYR SETUP COMPLETION

After the New Year Rollover complete the following setup:

Do the following steps in order

1. Change Focus to new year.
 - a. Update the District Calendar with holidays and vacation days defined.
 - b. Update each School Calendars with holidays and vacation days defined.
 - c. Edit School Term definitions and start dates and make any other changes needed in the new year.
 - d. Update Grade Reporting Periods, if needed.
 - e. Navigate to Synergy>Student>Student screen and (for the schools that have been processed) confirm the student records have the correct grade level, enter date, enter code, etc.
 - f. Navigate to other areas that may need changing in the new year: District Course, Attendance, Grade Reporting, etc.
2. Change Focus back to the current year:
 - a. Determine how to handle any new student enrollments that will transpire post NYR. See: [Post NYR Student Enrollment](#)
 - b. Take care of "Inactive" students in the current year after the NYR process has been run. See: [Post NYR Student Inactivating](#)
 - c. You may run the process as many times as you wish until the current school calendar has ended and you shift your work to the next school year.
 - d. User Groups can be mass updated to log into the new school year. Synergy SIS>System > User>User Groups>Menu>Mass Change Member Users.
 - e. At end of year, mark students that are promoted and graduated . See: [Year End Status Update](#)

POST NYR STUDENT ENROLLMENT

Navigate to **District Setup>System Tab>Disable New Year Activation.**

If **Disable New Year Activation** is unchecked, **New Year Action** will display on the Other Info tab of the Student Add screen.

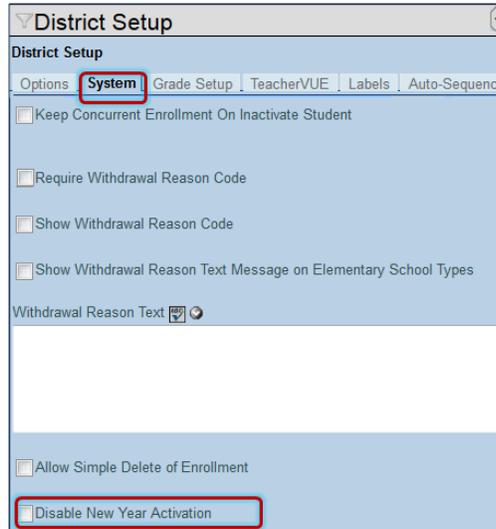


Figure 51 District Setup Screen System Tab

Enroll new student in current year and new year at the same time.

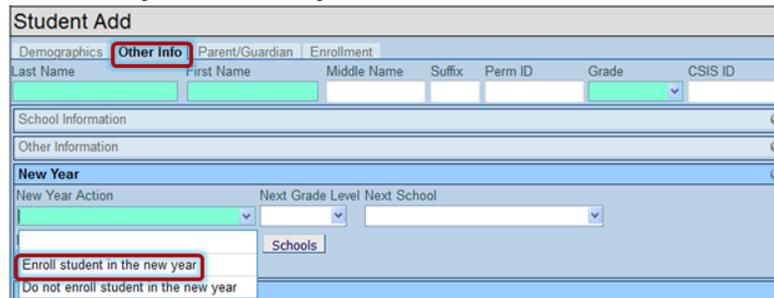


Figure 52 Student Add Screen

To enroll a new student into the current school year and the new school year at the same time:

1. On the Student Add screen, Other Info tab, select **Enroll student in the new year**.
2. Select **Next Grade Level**, **Next School**, and **Next Enter Code**.

Upon saving, the student is enrolled in the current and new school year, and into the school and grade



Figure 53 Student Screen Enrollment History Tab

designated.

If **Disable New Year Activation** is checked, the **New Year Action** does not display on the Other Info tab of the Student Add screen.

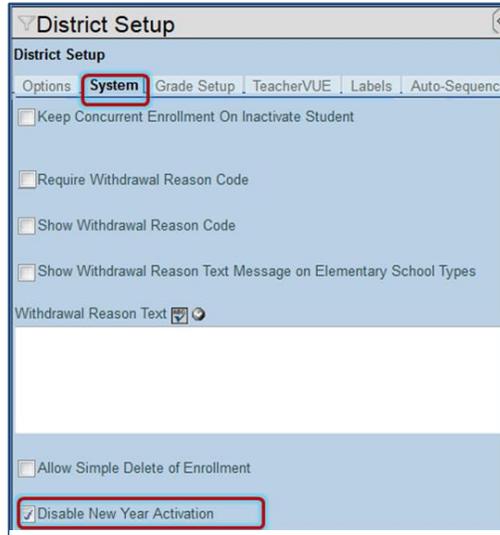


Figure 54 District Setup Screen System Tab

Enter **Next Grade Level**, and **Next School** information to include the student in a subsequent New Year Rollover.

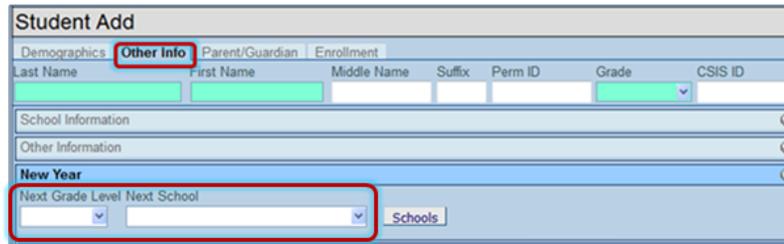


Figure 55 Student Add Screen Other Info Tab

IMPORTANT: If this option is selected and there is no subsequent New Year Rollover. The student will not be enrolled.

However, a subsequent New Year Rollover can be used to enroll new students in the new year.

1. Navigate to **District Setup>System Tab>Disable New Year Activation**.
2. Click to select a Process Students definition to use when adding/transferring students.

POST NYR STUDENT INACTIVATING

Navigate to **District Setup>System Tab>Disable New Year Activation.**

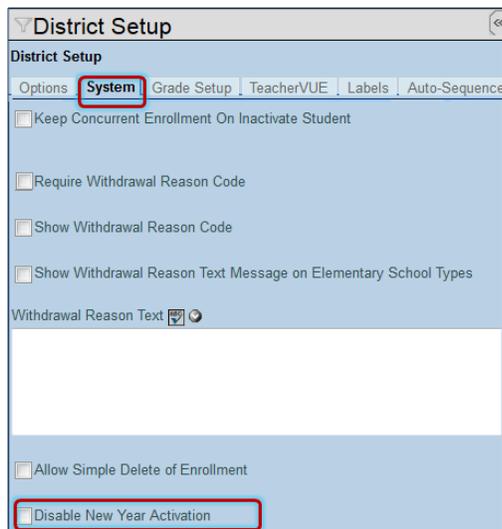


Figure 56 District Setup Screen System Tab

If **Disable New Year Activation** is unchecked, **New Year Action** will display on the Inactivate Student screen.

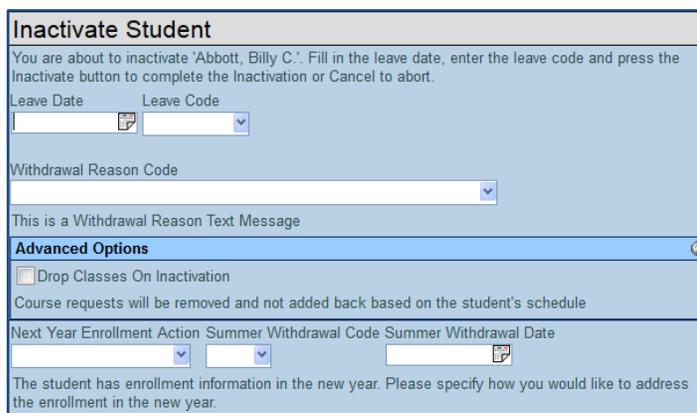


Figure 57 Inactivate Student Screen

There are three Next Year Enrollment Action options in the drop-down.

Delete Enrollment - This will delete the student enrollment from the new year.

Do Nothing - The student will remain enrolled in the new year.

No Show - The student will be a “No Show” in the new year.

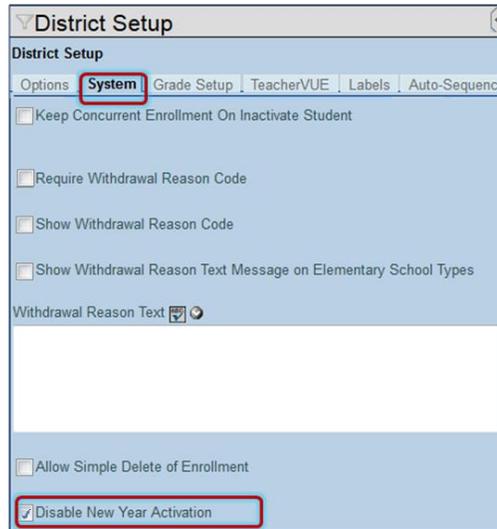


Figure 58 District Setup Screen System Tab

If **Disable New Year Activation** is checked, the **New Year Action** does not display on the Inactivate Student screen.

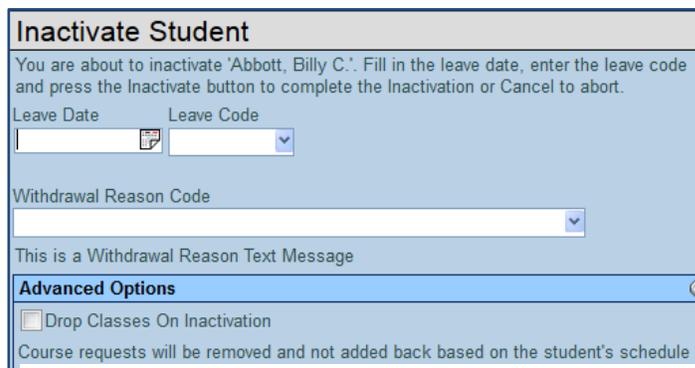


Figure 59 Inactivate Student Screen

IMPORTANT: If this option is selected, any student inactivated after the New Year Rollover process will still be enrolled for the new year.

However, the New Year Rollover Process can be used to delete any students who have been incorrectly left active when withdrawn in the current year.

1. Navigate to **New Year Rollover Setup>Execute tab**.
2. Check **Delete enrollments in the new year that are active in the current year** on a Process Students definition.

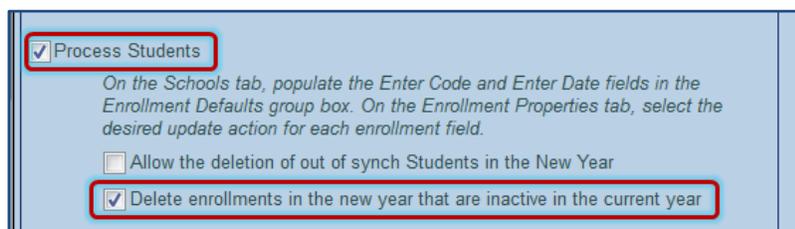


Figure 60 New Year Rollover Setup Screen Execute Tab

YEAR END STATUS UPDATE

At the end of each year, students who are graduating from 12th grade need to be marked as graduating. All other students need to be either promoted to the next grade level or marked as retained. Use Year End Status Update screen to promote student end of year status.

The **Year End Status Update** screen, found under Synergy SIS > Grading, is the most accommodating process to use when updating Graduation Status and Year End Status, but it can only update one school at a time. The **Assign Year End Status** on the New Year Rollover Setup>Execute tab is not as flexible or robust as the Year End Status Update Screen.

Figure 61 Year End Status Update Screen

Directions for using Year End Status Update for Graduating Students

1. Navigate to **Synergy SIS > Grading>Year End Status Update** screen.
2. In the **Update Action** drop-down select **Grad and Year End Status** to enter both the students' graduation date and their year end status.
3. Select **All** in the **Students To Process** and check **12** in **Grades To Process**.

IMPORTANT: If some students have already been manually edited, select **Only Students with No Graduation Date** or **Only Students with No Graduation Date and No Year End Status** from the **Students To Process** drop-down list so as to not override their current status.

4. Select any Year End Status Filters that might apply.
5. Enter the information to be entered for each student's graduation status in the **Graduation Status Update Options** section.
6. Check **Validate Only** to check the graduation status of the students and not change any data.
7. Select **G** (for graduated) in the **Year End Status** drop-down list.

- Click Execute when all options are selected. When the process is completed the Job Results screen displays.
- Click each icon to see the data in the file.

TIP: The Log That Shows Which Students We Updated is the most helpful, as it lists every student processed with the results of the process. If they did not meet the graduation requirements, it lists exactly which requirements were missing.

- This needs to be run at all schools.

```
Total Students Not Meeting Graduation Requirements: 826

Abbott, Billy C. 905483
  11 Free Enterprise      Required: 0.500 Completed 0
  12 World History Geography Required: 1.000 Completed 0.500
  2 English 9th Grade    Required: 2.000 Completed 0.500
  7 Science Required     Required: 2.000 Completed 1.000
```

Figure 62 Year End Status Log File

It may be necessary to run this process several times throughout the summer. For example, students may complete the graduation requirements through a summer school program or by taking a “make-up” test to meet the state testing requirements. Subsequent runs of the graduation check should be made with the following options so as not to override any existing data:

Update Action: Grad and Year End Status

Students to Process: Only Students with No Graduation Date, 12th Grade

Enter the graduation and year end status information as outlined above, and execute the process.

Directions for using Year End Status Update for Graduating Students

- Navigate to **Synergy SIS > Grading>Year End Status Update** screen.
- In the **Update Action** drop-down select **Year End Status**.
- Select **All** in the **Students To Process** and check all but 12 in **Grades To Process**.

IMPORTANT: If some students have already been manually edited, select Only Students with No Graduation Date or Only Students with No Graduation Date and No Year End Status from the Students To Process drop-down list so as to not override their current status.

- Select any Year End Status Filters that might apply.
- Select **P** (for promoted) in the **Year End Status** drop-down list.
- Click Execute when all options are selected. When the process is completed the Job Results screen displays.
- Click each icon to see the data in the file.

Other combinations of selections may be used to address special year end situations. Be sure to map out the order in which students are processed to minimize the manual data entry needed.

After the Year End Status Update has been completed, staff may need to manually edit the student records to identify any students who will be retained. Students in the 12th grade who did not graduate may also need to have their year end status manually adjusted. The Year End Status is entered on the Other Info tab of the Student screen.

SUMMER & NIGHT SCHOOL PROCESSING

A shortened version of the annual NYR process makes it easy to set up summer and night school sessions.

SUMMER SCHOOL PROCESSING

STEP ONE: PREPARATION

Define Summer School New Year Extension

1. Go to **SynergySIS>System>Setup>District Setup> Options tab.**



Figure 63 District Setup Screen
Options Tab Summer School Grid

2. Enter **Summer School Year** and select **Summer School Type**.
3. Click the blue triangle next to the year of the new extension. The triangle turns green and points down.

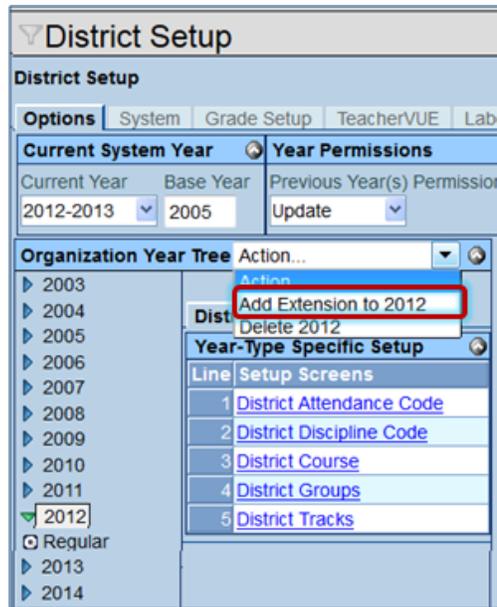


Figure 64 District Setup Screen Options Tab

4. Click on the year to highlight it.
5. Click **Action...** drop-down.
6. Select **Add extension to YYYY**. The Add Year Extensions screen opens.

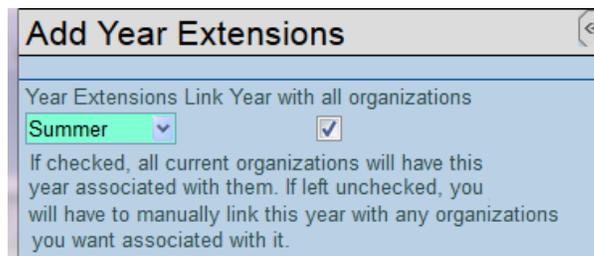


Figure 65 Add Year Extensions Screen

7. Select **Summer** from the Year Extension drop-down.
8. Check **Link the organizations** if appropriate.
9. Click **Save**.

District and School Calendar for Summer School

1. Highlight the newly created Summer extension.

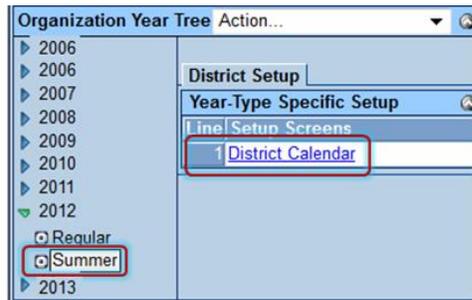


Figure 66 District Setup Screen Options Tab

2. Click on the **District Calendar** link in the Year-Type Specific grid. The District Calendar screen opens.



Figure 67 District Calendar Screen

3. Select **Regular** as the **Calendar Type** (think of it as a regular summer school calendar)



Figure 68 Collect Year Dates Screen

4. Click **Create Calendar**. The Collect Year Dates screen opens.
5. Enter the **Calendar Start Day** and the **Calendar End Day**. The Calendar Start and End days must encompass all summer session time periods.
6. Click **OK**. The Collect Year Dates screen closes.
7. Check the days of the week that classes will meet in District Calendar Options.
8. Enter any holidays by clicking in the **Type** box next to the Day (date) and making a selection from the drop-down.

Line	Month/Year	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
		Day	Type	Day	Type	Day	Type	Day	Type
1	Jun - 2013			24		25		26	
2		30						27	
3	Jul - 2013			1		2		3	
4		7		8		9		10	
5		14		15		16		17	
6		21		22		23		24	
7		28		29					

- Hol-Holiday
- Vac-Vacation
- Sta-Staff Development
- Non-Non-School Day
- Oth-Other
- Emu-Emergency Closure Day (Approved)
- Emu-Emergency Closure Day (Unapproved)
- Sup-Supplemental

Figure 69 District Calendar Screen

9. Click **Save**.
10. Create and save any non-attendance days.
11. You can choose to **Update Schools** with the changes after you have saved.
12. Log out and back into the summer extension and school to make sure your calendars are there.

Line	Include Change	Date	Original Value	New Value
1	<input checked="" type="checkbox"/>	07/04/2013		Hol

Figure 70 Attendance Calendar Update Screen

13. Navigate to **Synergy>System>School Setup>Options tab**.

Line	Setup options
1	Grading Setup
2	ParentVUE and StudentVUE School Configuration
3	Period Rotation Definition
4	School Attendance Code
5	School Attendance Options
6	School Calendar
7	School Course Opt-In
8	School Discipline Code

Figure 71 School Setup Screen Options Tab

14. Click **School Calendar** link. The School Calendar screen opens.
15. Click **Create Calendar**. Create School Calendar screen opens.
16. Check **Use District Calendar** and click **OK**.

Create School Calendar

If you would like to get the District calendar then select "Use District Calendar" checkbox and click OK. You can create your own independent calendar by entering the start and end dates of the calendar you would like to create.

District Calendar

If the 'Use District Calendar' check box is disabled the district calendar has not been created for the school's calendar type.

Calendar Type
Regular

Start Date: 06/04/2012 End Date: 06/29/2012

Use District Calendar

Figure 72 Create School Calendar Screen

School Setup

1. Navigate to **Synergy SIS>System>School Setup**.
2. Complete the needed summer school settings on the Basic Info Tab. For example: Periods, School Type, Attendance Type, Calendar Type (should be **Regular**), Term Codes, Grade Selection, etc..

REMEMBER: Any Type of summer school can offer classes for any defined grade level.

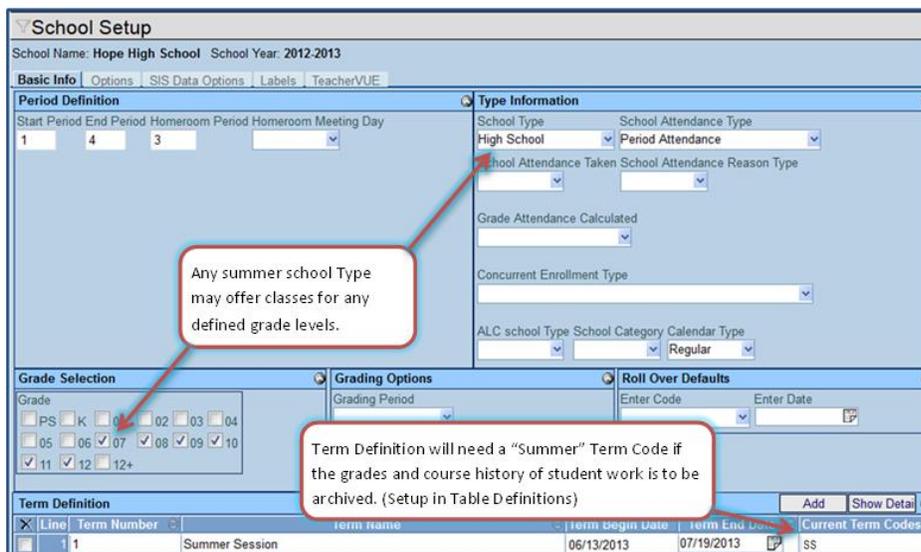


Figure 73 School Setup Screen

Identify Students Attending

1. Focus to the current regular school year.
2. Navigate to **Synergy SIS>Student>Student>Other Info tab>Summer School group box**.
3. Populate **Summer Grade Level** and **Summer School** for each student attending summer school.



Figure 74 Student Screen Other Info Tab Summer School Grid

STEP TWO: SETUP PROCESS SET

Navigate to **Synergy SIS>System>Setup>New Year Rollover Setup**.

Create a Summer School Rollover Process Set. See: [Create Process Set](#)

Execute Tab

1. Check **Process Students**.
2. Year Type should be Regular

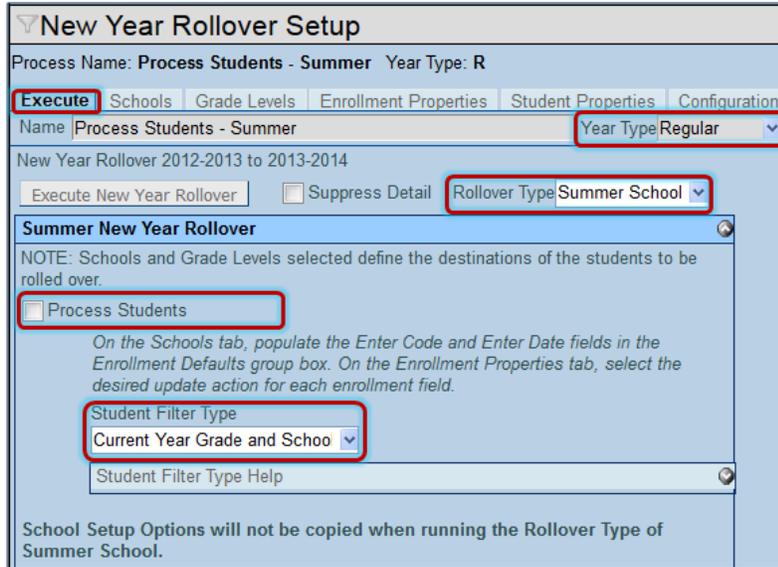


Figure 75 New Year Rollover Setup Screen Execute Tab

3. **Rollover Type** should be **Summer School**.
4. **Student Filter Type** should be **Current Year Grade and School**.
5. Click **Save**.

Schools Tab

1. Complete the **Calendar Types** grid with the **Default Calendar Dates** and **Enrollment Defaults**.
2. Using [chooser](#), select all **Live In SYNERGY SIS Schools** within the **Affected Schools** grid that will be hosting the summer school.
3. **Calendar Type** should be **Regular**.

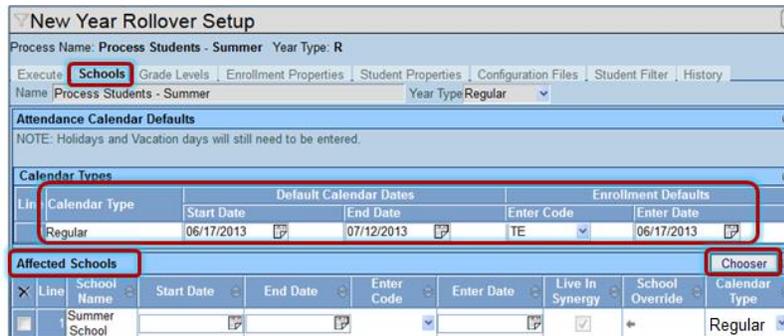


Figure 76 New Year Rollover Setup Screen Schools Tab

4. Click **Save**.

Grade Levels Tab

1. Select the **Affected Grade Levels** in the current regular year to process.

2. Click **Save**.

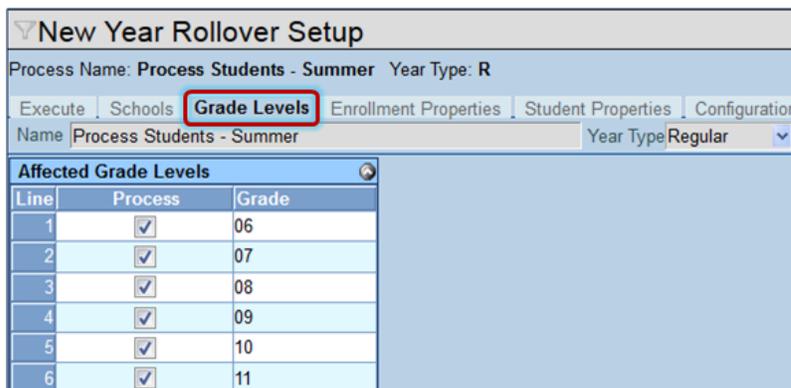


Figure 77 New Year Rollover Setup Screen Grade Levels Tab

NOTE: Enrollment Properties, Student Properties, and Configuration Files do not need to be set up, as Summer Rollover only processes students.

STEP THREE: RUNNING THE PROCESS

REMEMBER: The Focus should be set to the current regular school year and to any school.

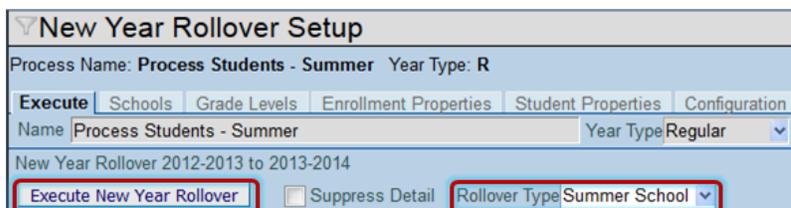


Figure 78 New Year Rollover Setup Screen Execute Tab

1. From New Year Rollover Setup screen, select the summer school rollover definition. See: [Display a NYR Process Set Definition](#)
2. Click **Execute New Year Rollover** on the Execute tab.

STEP FOUR: AFTER THE PROCESS

Assign Staff to Summer School

1. Change your focus to the Summer School extension/Summer School.
2. Navigate to **Synergy SIS>Staff>Staff screen**.
3. Click **Add**. The StaffFind screen opens.
4. Select **Summer School** in the Assign to School drop-down.
5. Enter all or part of the staff **Last Name, First Name, or Badge Num.** in the Selection Criteria.
6. Click **Find**.
OR
Just click **Find** to select from the entire list of staff names.
7. Highlight the **Staff Name**.
8. Click **Assign**. Staff will be assigned to the Summer School.

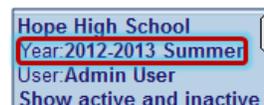


Figure 79 Focus

Opt In to Courses for the Summer School

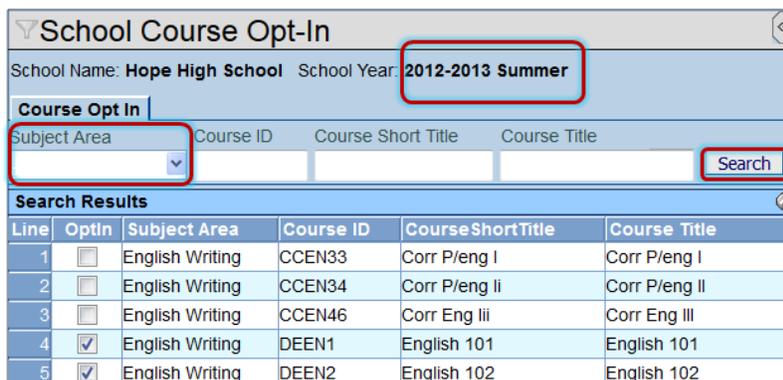


Figure 80 School Course Opt-In Screen

1. Change the **Focus** to the Summer School extension/Summer School.
2. Navigate to **Synergy SIS>Course >School Course Opt-In**.
3. Select the **Subject Area** from the drop-down and click **Search**.
4. Check **Opt-In** for the courses to use for summer school, and **Save** your selections.

Set up Sections for the Summer School

1. Change the **Focus** to the Summer School extension/Summer School.
2. Navigate to **Synergy SIS>Schedule>Section**.
3. Click **Add**. A new Section screen opens.
4. Populate the mandatory fields, along with any other desirable information.



Figure 81 Section Add Screen

5. Select the designated Summer School Term as the **Term Code**.
6. Click **Save**. The screen closes.

Schedule the Students

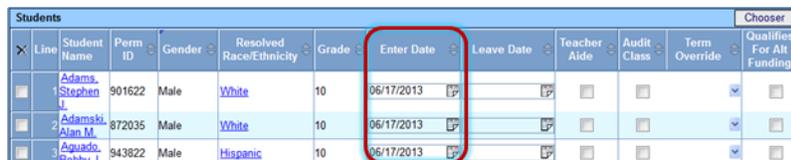


Figure 82 Section Screen Students Grid

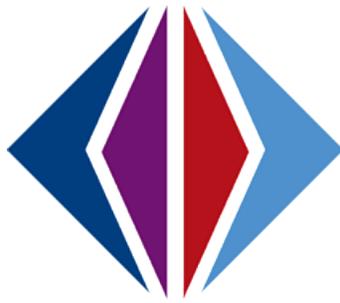
1. Using **Chooser**, select the students for the section.
2. The **Enter Date** should default to the first day of the Summer School Calendar.
3. **Save** when finished.

NIGHT SCHOOL PROCESSING

If the schools at the district offer a night school program, follow all of the steps as outlined for a summer school. When naming the process, select **Regular** for the Year Type. When choosing the Rollover Type select **Night**.

The screenshot shows the 'New Year Rollover Setup' window with the 'Execute' tab selected. The 'Process Name' is 'Process Students - Night' and the 'Year Type' is 'Regular'. The 'Rollover Type' is set to 'Night'. The window also shows a 'Name' field with 'Process Students - Night' and a 'Suppress Detail' checkbox which is unchecked. The 'Execute New Year Rollover' button is visible.

Figure 83 New Year Rollover Setup Screen Execute Tab



TIPS & TROUBLESHOOTING

TIPS

Display a NYR Process Set Definition

To display a NYR Process Set definition,
Click , then click . All available New Year definitions display in the Find: Result screen.
Double-click the desired definition. Close the screen and the definition displays.

Re-Use and Re-Name

If re-using NYR Process Sets from other school years, it is best to rename them.

Option Set – Schools tab – Calendar Types grid

All option sets need to have the default calendar dates and enrollment defaults entered. Not all of the option sets are using these, but they should all be populated.

How to Add Schools:

Click . In the window that opens, click . A list of all schools display. To move all of them to the right side of the screen, click . Or, double-click individual schools to add them.
Click .

Configuration Files related to Scheduling

School; Course School
School; House
School; Schedule Mass Assign
School; School Room
School; School Year Course Group
School; Section
School; Staff School Year

Subsequent Rollovers – Process Student Options

Allow the deletion of out of synch Students in the New Year
Delete enrollments in the new year that are inactive in the current year

Retained students

Usually processed at the end of the school year

Can be processed using the Process Students option set. The easiest and cleanest way to process is changing their grade level on the Enrollment History tab in the new year and modifying their Year End Status in the current year.

Reminders

Always process from the current year and Focus to a school
The History Tab contains Processing History logs for troubleshooting purposes

Assign Year End Status Options

Assign Year End Status on Execute tab of option set using the Year End Status Update screen
 Synergy SIS > Grading

Figure 84 Year End Status Update Screen

Process Specific Students:

Student Filter Tab

This tab is useful to process specific students. A created filter can be used to narrow down student selection.

Figure 85 Student Screen Demographics Tab

In this example, the Focus school is Hope High School. Using the Student screen, a filter is created to find students whose **School of Residence** is King High School.

1. Navigate to the Student screen, Demographics tab.
2. Select **King High School** from the School of Residence drop-down.
3. Click **Find**. The Student: Find Result screen displays a list of students matching the criteria.
4. Enter a **Filter Name** (the example is named King HS School of Residence) and check **Make Active**.

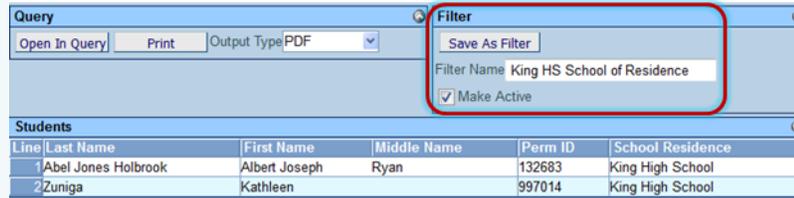


Figure 86 Student: Find Result screen

1. Click **Save As Filter**.
2. Select the **New Year Rollover** definition on the New Year Rollover Setup screen.
3. On the Student Filter tab, click on the **filter**.



Figure 87 Filter Icon Example

4. Select the newly created filter, the example used **King HS School of Residence**, and click **Apply**. The filter is active.

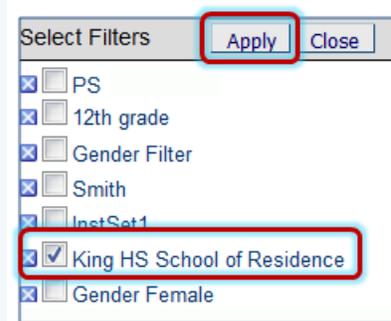


Figure 88 Filter Selection Example

5. Click **Chooser**. The Chooser screen opens.

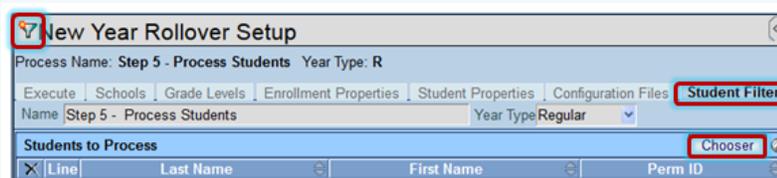


Figure 89 Active Filter Example

6. Click **Find**. The student names display in the Selected Items grid.
7. Click **Select**. The names display in the Students to Process grid.

TROUBLESHOOTING

No Rev Organization Years found

No calendar setup

Logged into the new year and can't scroll through students.

Resolution: Clear cache . Log out and log back in

Error which may occur when running NYR for schools using sections, especially sections with unassigned staff.

Resolution: Disable the option **Enable historical tracking of staff** in sections on the District Setup screen – System tab – Other Options grid. This option can be enabled again when the rollover process is complete.

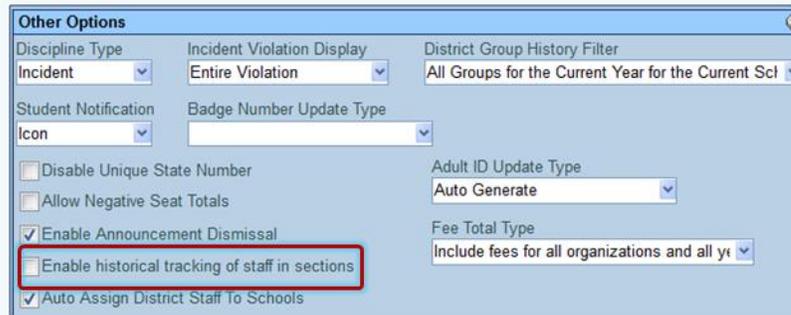


Figure 90 Setup Screen System Tab

Missing Grid Code, Grid Code not defined for New Year.

Resolution: This error occurs when processing new year rollover for schools not using the grid codes. This error can be ignored. It does not affect the process.

Users can't set Focus to the new year after rollover is done.

Resolution: Users are missing permissions to access the new year. On the User Group screen – Organizations tab, add permissions to the Next Year drop-down.

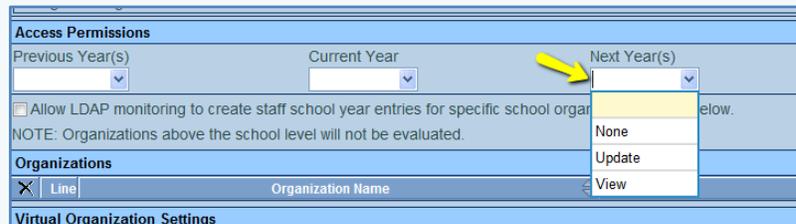
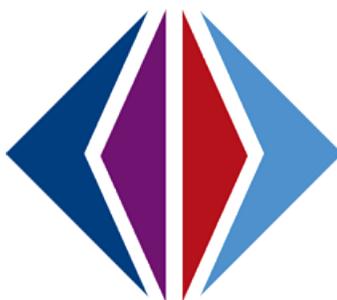


Figure 91 User Group Screen Organizations Tab



NYR CHECKLIST, CONFIGURATION & ENROLLMENT PROPERTIES LISTS

NYR CHECKLIST

STEP 1 - PREPARATION		
	Verify New Year Extension exists in District Setup > Options Tab > Organization Year Tree. If not, add Regular Extension to new year, linking to all organizations	<input type="checkbox"/>
	Grade Setup (Check for proper grade promotion)	<input type="checkbox"/>
	Verify Next Grade and Next School fields are blank in the current school year, unless students are retained.	<input type="checkbox"/>
	Identify retained students and next school exception students. Update next grade and school manually for these students	<input type="checkbox"/>
	Review Configuration Files, Enrollment, and Student Properties tabs in NYR Setup screen	<input type="checkbox"/>
	Identify any changes to attendance codes, discipline codes, etc. for the new year	<input type="checkbox"/>
	Gather District and School Calendar – Start, End, and Enrollment Enter dates. Identify grading periods and term start and end dates	<input type="checkbox"/>
	Determine any changes to school boundaries for the new year.	<input type="checkbox"/>
	Determine whether to use/not use Grid Codes for next school assignments. Run the <i>NYR401 Boundary Exception Students</i> report to identify invalid grid code issues.	<input type="checkbox"/>
	Decide how to set-up process sets - type, function or a combination of both Recommended order: Configuration files, Create Calendars, Mass Assign Next Grade and School, Process Students. You may need multiple sets to accommodate your specific district configuration. It is recommended not including more than 10 schools when processing students. This will help to avoid timeouts, and can be helpful if troubleshooting.	<input type="checkbox"/>
	Process Server set to 300 minutes run time or greater (max is 360 min.) Clear Event Log in Process Service	<input type="checkbox"/>
	<u>Prior to running any process back up the database</u> (some functions cannot be reversed)	<input type="checkbox"/>

STEP 2 - STEPS TO SETUP THE PROCESS SETS		
1	Set Focus to a school and the current year (not to the Dist. or a sub-node)	<input type="checkbox"/>
2	Create your process sets. If you previously created process sets for past school years, edit/rename them so they are grouped together and not confused with the new ones you will create for this school year process. Be sure to update enrollment and calendar defaults on the Schools tab.	<input type="checkbox"/>
3	Update information on each of the NYR Setup process tabs: Execute, Schools, Grade Levels, Enrollment Properties, Student Properties, Configuration Files, (and optionally, Student Filter)	<input type="checkbox"/>
	Note – Student Locker and Student Group assignments (Configuration Files Tab) must be included in the initial Process Students definition. Both Process Students and Process Configuration Files must be checked on the Execute Tab.	
	Note -Configuration File definition must include District-Grid (even if not using Grids)	
	Note – Schools Tab > Calendar Types grid – Default Calendar Dates and Enrollment Defaults> all fields must be populated for all definitions created.	

STEP 3 - RUN THE PROCESS SETS (SUGGESTED ORDER)		
1	Focus to current year and school	<input type="checkbox"/>
2	Process the configuration sets for the district and all schools <i>in this order:</i>	<input type="checkbox"/>
	4. <u>District Configuration</u> – All appropriate District file types	<input type="checkbox"/>
	5. <u>School Setup Configuration</u> – School Setup/School Grade/School Year Term Def/School Setup Tracks	<input type="checkbox"/>
	6. <u>School Configuration</u> – All other applicable School file types	<input type="checkbox"/>
3	Remember to check the History tab for errors as it will contain information about the processes immediately after they are run or executed	
4	Clear cache and log out/in after processing configuration sets	<input type="checkbox"/>
5	Create the calendars for the district and all schools	<input type="checkbox"/>
6	Clear cache and log out/in after creating calendars	<input type="checkbox"/>
7	Assign next grade and school for all schools	<input type="checkbox"/>
8	Take care of retentions and next school exceptions (Option)	<input type="checkbox"/>
9	Process Students	
10	Process year end status and expected graduation year, if needed. (Option)	<input type="checkbox"/>
11	Use the Year End Status Update screen in Synergy SIS Grading in lieu of the NYR function. (Option)	<input type="checkbox"/>

STEP – 4 AFTER THE PROCESS		
	Do not run Gradebook synch for the new year until you are done with the current year	<input type="checkbox"/>
	Change focus to new year	<input type="checkbox"/>
	Update district and school calendars with holidays, etc.	<input type="checkbox"/>
	Set school term definitions for each school. (Option: use the School Setup Copy view in System > Data Maintenance to copy the setup for one school to others)	<input type="checkbox"/>
	Update Grading Period dates for each school. (Use the above option to copy setup to other schools.)	<input type="checkbox"/>
	District Setup > System Tab > Enrollment Options – Disable New Year Activation checkbox . Decide to use the built in option of updating new enrollments and student inactivation’s or disable the function in District Setup.	<input type="checkbox"/>
	Make any needed changes to Attendance, Discipline, and other setup options.	<input type="checkbox"/>
	Run the processes as many times as needed to update the new year information. (Remember: Not all processes are fully changeable.)	<input type="checkbox"/>
	Update Grad and Year End Status if needed. Synergy SIS > Grading > Year End Status Update screen . This must be done at each school.	<input type="checkbox"/>
	User Groups can be mass updated to log into the new school year. Synergy SIS > System > User > User Groups > Menu > Mass Change Member Users	<input type="checkbox"/>

CONFIGURATION FILES LIST

Process	Type	Name	Location	Notes/Special Functionality
<input type="checkbox"/>	District	Conference Visitation Code	Student > Setup > Conference Visitation Codes	
<input type="checkbox"/>	District	District Attendance Reasons	Attendance > Setup > District Attendance Code	
<input type="checkbox"/>	District	District Reporting Period	Attendance > Setup > District Calendar > Report Period tab	
<input type="checkbox"/>	District	District Student Groups	Student > Setup > District Groups	
<input type="checkbox"/>	District	District Tracks	System > Setup > District Tracks	
<input type="checkbox"/>	District	Dwelling Grid	Census > Dwelling	MN districts only
<input type="checkbox"/>	District	Grad Req Def Sub Year	Grading > Setup > Graduation Requirements	
<input type="checkbox"/>	District	Grid	System > Setup > Address Grid Definition	Required for grid-based school assignment
<input type="checkbox"/>	District	School Vaccination Sch Yr	Health > Setup > Immunization Definition	
<input type="checkbox"/>	District	Student Transcript Options	Course History > Setup > Student Transcript Options	
<input type="checkbox"/>	District	Text Year	Health > Setup > Immunization Definition > Immunization Report Settings tab	
<input type="checkbox"/>	School	Attend Extract Fields	Attendance > Reports Daily > Extracts > School Enrollment History Extract	
<input type="checkbox"/>	School	Course School	Course > School Course	
<input type="checkbox"/>	School	Discipline Rollover	Discipline Incident > Setup > District Discipline Options	
<input type="checkbox"/>	School	Grade Rollover	Grading>Setup>District GPA Types & School GPA Types	
<input type="checkbox"/>	School	Honor Roll Def	Grading > Setup > Honor Roll and Eligibility Definition	
<input type="checkbox"/>	School	House	System > Setup > School Scheduling Options > House/Team/ Exclusion tab, House Codes section	
<input type="checkbox"/>	School	Locker	Locker > Locker	
<input type="checkbox"/>	School	Mail Merge Rollover	System > Setup > Mail Merge Definition	
<input type="checkbox"/>	School	Sched Mass Assign	Mass Scheduling > Mass Assign Course Requests	
<input type="checkbox"/>	School	School Att Letter Opt	Attendance > Attendance Letter	
<input type="checkbox"/>	School	School Attendance Reasons	Attendance > Setup > School Attendance Code	
<input type="checkbox"/>	School	School Fee	Fees > Setup > School Fee Codes	
<input type="checkbox"/>	School	School Grade	System>Setup>School Setup, Grade Selection section	
<input type="checkbox"/>	School	School Room	System > Setup > School Room	
<input type="checkbox"/>	School	School Setup	Synergy SIS >AZ>Setup>SAIS School Setup	
<input type="checkbox"/>	School	School Setup Tracks	System > Setup > School Setup	
<input type="checkbox"/>	School	School Student Groups	Student > Setup > School Groups	
<input type="checkbox"/>	School	School Team Sped		Synergy SE only - Copies current team list to new year
<input type="checkbox"/>	School	School Year Course Group	Course > Course Group	
<input type="checkbox"/>	School	School Year Grade Comment	Grading > Setup > Grading Setup > Comments tab	
<input type="checkbox"/>	School	School Year Grade Comment Staff	Grading > Setup > Grading Setup > Comments tab, No Staff Override column	
<input type="checkbox"/>	School	School Year Grade Period	Grading > Setup > Grading Setup > Grade Period/Mark Definition tab	
<input type="checkbox"/>	School	School Year Need Program Def Opt In	System > Setup > School Setup, Programs/Needs Section	Only if Needs set to school based
<input type="checkbox"/>	School	School Year On Crs	Course > District Course, Parent/UE Options	
<input type="checkbox"/>	School	School Year Trm Def	System > Setup > School Setup	
<input type="checkbox"/>	School	Section	Schedule > Section	
<input type="checkbox"/>	School	Staff School Year	Staff > Staff > Schools tab	
<input type="checkbox"/>	School	Team	System > Setup > School Scheduling Options > House/Team/Exclusion tab, Teams Codes section	
<input type="checkbox"/>	Student	Student Group	Student > Student Groups	
<input type="checkbox"/>	Student	Student Locker	Locker > Locker	
<input type="checkbox"/>	Student	Student Team NYRProcess	Synergy SE > System > Setup > Special Ed School Team	
<input type="checkbox"/>	Student	Web Methods NYRProcess UI		VA districts only - not recommended for other states

ENROLLMENT PROPERTIES LIST

Clear or Set	Enrollment Field	Location	Notes/Special Functionality
<input type="checkbox"/>	AbsenceReportingPolicy	Other Info tab	
<input type="checkbox"/>	AllowMedication	Other Info tab	
<input type="checkbox"/>	AllowTylenol	Other Info tab	
<input type="checkbox"/>	AttendPermitCode	Other Info tab	CA districts only - Inter-district transfers
<input type="checkbox"/>	AttendPermitDate	Other Info tab	
<input type="checkbox"/>	BusRouteFromSchool	Other Info tab	
<input type="checkbox"/>	BusRouteToSchool	Other Info tab	
<input type="checkbox"/>	CAHSEELARetake	Other Info tab	CA districts only - Pre-ID use
<input type="checkbox"/>	CAHSEEMathRetake	Other Info tab	
<input type="checkbox"/>	CameFrom	Enrollment tab	
<input type="checkbox"/>	CollegeEnrolled	Enrollment tab	
<input type="checkbox"/>	CompletionStatus	Other Info tab	CA districts only - CALPADS
<input type="checkbox"/>	DenyPhoto/Interview	Other Info tab	
<input type="checkbox"/>	DistrictOfResidence	Enrollment tab	
<input type="checkbox"/>	DistrictofSpecialEducationAccountability	Enrollment tab	Only if another district shares SPED responsibility - Mostly used in CA - CALPADS
<input type="checkbox"/>	DropOffAddress	Other Info tab	
<input type="checkbox"/>	DropOffBusStop	Other Info tab	
<input type="checkbox"/>	DropOffCity	Other Info tab	
<input type="checkbox"/>	DropOffComment	Other Info tab	
<input type="checkbox"/>	DropOffLocationType	Other Info tab	
<input type="checkbox"/>	DropOffReasonCode	Other Info tab	
<input type="checkbox"/>	DropOffReasonDate	Other Info tab	
<input type="checkbox"/>	DropOffRespPerson	Other Info tab	
<input type="checkbox"/>	DropOffRespPhone	Other Info tab	
<input type="checkbox"/>	DropOffSchoolGU	Other Info tab	
<input type="checkbox"/>	DropOffState	Other Info tab	
<input type="checkbox"/>	DropOffTransportTime	Other Info tab	
<input type="checkbox"/>	DropOffTransportType	Other Info tab	
<input type="checkbox"/>	DropOffZipCode	Other Info tab	
<input type="checkbox"/>	EnrUser1	Enrollment tab	Field displayed (drop-down, checkbox or fill-in) depends on ENRUser format
<input type="checkbox"/>	EnrUser2	Enrollment tab	
<input type="checkbox"/>	EnrUser3	Enrollment tab	
<input type="checkbox"/>	EnrUserCheck1	Enrollment tab	
<input type="checkbox"/>	EnrUserCheck2	Enrollment tab	
<input type="checkbox"/>	EnrUserCheck3	Enrollment tab	
<input type="checkbox"/>	EnrUserDD1	Enrollment tab	
<input type="checkbox"/>	EnrUserDD2	Enrollment tab	
<input type="checkbox"/>	EnrUserDD3	Enrollment tab	
<input type="checkbox"/>	EnrUserDD4	Enrollment tab	
<input type="checkbox"/>	EnrUserDD5	Enrollment tab	
<input type="checkbox"/>	EnrUserDD6	Enrollment tab	
<input type="checkbox"/>	EnrUserNum1	Enrollment tab	
<input type="checkbox"/>	EnrUserNum2	Enrollment tab	
<input type="checkbox"/>	EnrUserNum3	Enrollment tab	
<input type="checkbox"/>	EnrUserNum4	Enrollment tab	
<input type="checkbox"/>	EnrUserNum5	Enrollment tab	
<input type="checkbox"/>	EnteredByUser	Other Info tab	
<input type="checkbox"/>	ExcludeADA/ADM	Enrollment tab	
<input type="checkbox"/>	ExpCode		
<input type="checkbox"/>	ExpTimeCode		
<input type="checkbox"/>	ExtendLearningProgram	Other Info tab	

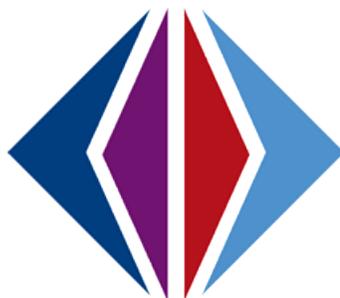
Synergy New Year Rollover Process Guide

Clear or Set	Enrollment Field	Location	Notes/Special Functionality
<input type="checkbox"/>	ForbidAutoDial	Not visible on a tab	
<input type="checkbox"/>	FullTimeVirtualProgram	Other Info tab, Enrollment History	
	<i>GradeExitCode</i>	<i>Enrollment tab</i>	<i>Set to Blank for next year's NYR process</i>
<input type="checkbox"/>	HasChangedFlag	Other Info tab	
<input type="checkbox"/>	IVEP	Other Info tab	
<input type="checkbox"/>	LeaveUnattended	Other Info tab	
<input type="checkbox"/>	LockerNumber	Other Info tab, School Information section	
<input type="checkbox"/>	MilitaryCompactStatute	Enrollment tab	
<input type="checkbox"/>	MovedTo	Enrollment tab	
	<i>NextGradeLevel</i>	<i>Other Info tab</i>	<i>Set to Blank for next year's NYR process</i>
	<i>NextSchoolAttend</i>	<i>Other Info tab</i>	<i>Set to Blank for next year's NYR process</i>
	<i>NextSchoolGU</i>	<i>Other Info tab</i>	<i>Set to Blank for next year's NYR process</i>
	<i>NextTrackGU</i>	<i>No display</i>	<i>Set to Blank for next year's NYR process</i>
	<i>NoShowStudent</i>	<i>No display</i>	<i>Set to Blank for next year's NYR process</i>
<input type="checkbox"/>	OldSISStudentNum	Enrollment tab	Only when synchronizing with SASI XP
<input type="checkbox"/>	OptOutMedicalFed		
<input type="checkbox"/>	OptOutMedicalState	Other Info tab	
<input type="checkbox"/>	OverridetoforcestudenttotakeSTS	Other Info tab	CA districts only
<input type="checkbox"/>	PickUpAddress	Other Info tab	
<input type="checkbox"/>	PickUpBusStop	Other Info tab	
<input type="checkbox"/>	PickUpCity	Other Info tab	
<input type="checkbox"/>	PickUpComment	Other Info tab	
<input type="checkbox"/>	PickUpLocationType	Other Info tab	
<input type="checkbox"/>	PickUpReasonCode	Other Info tab	
<input type="checkbox"/>	PickUpReasonDate	Other Info tab	
<input type="checkbox"/>	PickUpRespPerson	Other Info tab	
<input type="checkbox"/>	PickUpRespPhone	Other Info tab	
<input type="checkbox"/>	PickUpSchoolGU	Other Info tab	
<input type="checkbox"/>	PickUpState	Other Info tab	
<input type="checkbox"/>	PickUpTransportTime	Other Info tab	
<input type="checkbox"/>	PickUpTransportType	Other Info tab	
<input type="checkbox"/>	PickUpZipCode	Other Info tab	
<input type="checkbox"/>	PreviousLocationType	Enrollment Tab	
<input type="checkbox"/>	PreviousYearEndStatus		
<input type="checkbox"/>	PXPOCRLockedIn	Schedule Request screen, Options tab	
<input type="checkbox"/>	PXPOCRLockedInDt	Schedule Request screen, Options tab	
<input type="checkbox"/>	PXPOCRValidated	Schedule Request screen, Options tab	
<input type="checkbox"/>	PXPOCRValidatedDt	Schedule Request screen, Options tab	
<input type="checkbox"/>	ReceiverSchool	Other Info tab	CA districts & Synergy SE only
<input type="checkbox"/>	RegistrationLastUpdated	Other Info tab	
<input type="checkbox"/>	RegistrationReceived	Other Info tab	
<input type="checkbox"/>	ResponsibleDistrict	Other Information tab, Enrollment History	
<input type="checkbox"/>	ResponsibleSchool	Other Information tab, Enrollment History	
<input type="checkbox"/>	SchDismissTime	Other Info tab	
<input type="checkbox"/>	ScheduleBalance	Schedule Request screen, Options tab	
<input type="checkbox"/>	ScheduleExemptHouse	Schedule Request>Options tab	
<input type="checkbox"/>	ScheduleExemptTeam	Schedule Request screen, Options tab	
<input type="checkbox"/>	ScheduleHighPeriod	Schedule Request screen, Options tab	

Clear or Set	Enrollment Field	Location	Notes/Special Functionality
<input type="checkbox"/>	ScheduleHouse	Schedule Request screen, Options tab	
<input type="checkbox"/>	ScheduleLowPeriod	Schedule Request screen, Options tab	
<input type="checkbox"/>	ScheduleStamp	Schedule Request screen, Options tab	
<input type="checkbox"/>	ScheduleTeam	Schedule Request screen, Options tab	
<input type="checkbox"/>	SchoolChoiceStatus	Enrollment History tab, detail screen, Other Information tab	
<input type="checkbox"/>	SchoolCompletionCode	Enrollment History tab, detail screen	
<input type="checkbox"/>	SchoolResidence	Enrollment tab	CA districts & Synergy SE only
<input type="checkbox"/>	SchStartTime	Other Info tab	
<input type="checkbox"/>	ServingDistrict	Other Information tab, Enrollment History	
<input type="checkbox"/>	ServingSchool	Other Information tab, Enrollment History	
<input type="checkbox"/>	SpecialEdSchoolOfAttendance	Enrollment tab	CA districts & Synergy SE only
<input type="checkbox"/>	SpecialTransReqComment	Other Info tab	
<input type="checkbox"/>	SpEd1stSemesterReimbursement	Special Ed Student Services screen, Other Information tab	
<input type="checkbox"/>	SpEd2ndSemesterReimbursement	Special Ed Student Services screen, Other Information tab	
<input type="checkbox"/>	SpEdRegionalTuitionReimbrDisabilityCode		
<input type="checkbox"/>	SpEdSummerSemesterReimbursement		
	SrEnrText1		Reserved by Edupoint for future state reporting
	SrEnrText10		
	SrEnrText2		
	SrEnrText3		
	SrEnrText4		
	SrEnrText5		
	SrEnrText6		
	SrEnrText7		
	SrEnrText8		
	SrEnrText9		
	SrEnrUserCheck01		
	SrEnrUserCheck02		
	SrEnrUserCheck03		
	SrEnrUserCheck04		
	SrEnrUserCheck05		
	SrEnrUserCheck06		
	SrEnrUserCheck07		
	SrEnrUserCheck08		
	SrEnrUserCheck09		
	SrEnrUserCheck10		
	SrEnrUserDD01		
	SrEnrUserDD02		
	SrEnrUserDD03		
	SrEnrUserDD04		
	SrEnrUserDD05		
	SrEnrUserDD06		
	SrEnrUserDD07		
	SrEnrUserDD08		
	SrEnrUserDD09		
	SrEnrUserDD10		
	SrEnrUserDD11		
	SrEnrUserDD12		
	SrEnrUserDD13		

Clear or Set	Enrollment Field	Location	Notes/Special Functionality
	SrEnrUserDD14		Reserved by Edupoint for future state reporting
	SrEnrUserDD15		
	SrEnrUserDD16		
	SrEnrUserDD17		
	SrEnrUserDD18		
	SrEnrUserDD19		
	SrEnrUserDD20		
	SrEnrUserNum01		
	SrEnrUserNum02		
	SrEnrUserNum03		
	SrEnrUserNum04		
	SrEnrUserNum05		
	SrUserCheck01		
	SrUserCheck02		
	SrUserCheck03		
	SrUserCheck04		
	SrUserCheck05		
	SrUserCodeDD01		
	SrUserCodeDD02		
	SrUserCodeDD03		
	SrUserCodeDD04		
	SrUserCodeDD05		
	SrUserCodeDD06		
	SrUserCodeDD07		
	SrUserCodeDD08		
	SrUserCodeDD09		
	SrUserCodeDD10		
	SrUserCodeDD11		
	SrUserCodeDD12		
	SrUserCodeDD13		
	SrUserCodeDD14		
	SrUserCodeDD15		
	SrUserCodeDD16		
	SrUserCodeDD17		
	SrUserCodeDD18		
	SrUserCodeDD19		
	SrUserCodeDD20		
	SrUserData1		
	SrUserData2		
	SrUserData3		
	SrUserData4		
	SrUserData5		
	SrUserNum1		
	SrUserNum2		
	SrUserNum3		
	SrUserNum4		
	SrUserNum5		
	SrUserText1		
	SrUserText10		
	SrUserText2		
	SrUserText3		
	SrUserText4		
	SrUserText5		
	SrUserText6		
	SrUserText7		
	SrUserText8		
			Reserved by Edupoint for future state reporting

Clear or Set	Enrollment Field	Location	Notes/Special Functionality
	SrUserText9		
<input type="checkbox"/>	StatementOfAwareness	Other Info tab	
<input type="checkbox"/>	SubSchool	Enrollment tab	
	SummerGradeLevel	Other Info tab	Set to Blank for next year's NYR process
	SummerSchool	Other Info tab	
	SummerWithdrawalReasonCode	Enrollment tab	
	SummerWithdrawalCode	Enrollment tab	
	SummerWithdrawalDate	Enrollment tab.	
<input type="checkbox"/>	TechPrep	Other Info tab	CA districts only
<input type="checkbox"/>	Title1Exit	Enrollment tab	
<input type="checkbox"/>	Title1Program	Enrollment tab	
<input type="checkbox"/>	Title1Service	Enrollment tab	
<input type="checkbox"/>	Track	Enrollment tab	
<input type="checkbox"/>	TransportingDistrict	Enrollment tab	Synergy SE only
<input type="checkbox"/>	TransportEligible	Other Info tab	
<input type="checkbox"/>	TransportRequestDate	Other Info tab	
<input type="checkbox"/>	TransportStartDate	Other Info tab	
<input type="checkbox"/>	TruancyConferenceHeld		
<input type="checkbox"/>	UserCheck1	Other Info tab	Fields displayed (drop-down, checkbox or fill-in) depend on User Code
<input type="checkbox"/>	UserCheck2	Other Info tab	
<input type="checkbox"/>	UserCheck3	Other Info tab	
<input type="checkbox"/>	UserCheck4	Other Info tab	
<input type="checkbox"/>	UserCheck5	Other Info tab	
<input type="checkbox"/>	UserCheck6	Other Info tab	
<input type="checkbox"/>	UserCheck7	Other Info tab	
<input type="checkbox"/>	UserCheck8	Other Info tab	
<input type="checkbox"/>	UserCode1,DD1	Other Info tab	
<input type="checkbox"/>	UserCode2,DD2	Other Info tab	
<input type="checkbox"/>	UserCode3,DD3	Other Info tab	
<input type="checkbox"/>	UserCode4,DD4	Other Info tab	
<input type="checkbox"/>	UserCode5,DD5	Other Info tab	
<input type="checkbox"/>	UserCode6,DD6	Other Info tab	
<input type="checkbox"/>	UserCode7,DD7	Other Info tab	
<input type="checkbox"/>	UserCode8,DD8	Other Info tab	
<input type="checkbox"/>	UserCode9,DD9	Other Info tab	
<input type="checkbox"/>	UserDate1	Other Info tab	
<input type="checkbox"/>	UserDate2	Other Info tab	
<input type="checkbox"/>	UserDate3	Other Info tab	
<input type="checkbox"/>	UserDate4	Other Info tab	
<input type="checkbox"/>	UserNum1,DD1	Other Info tab	
<input type="checkbox"/>	UserNum2,DD2	Other Info tab	
<input type="checkbox"/>	UserNum3,DD3	Other Info tab	
<input type="checkbox"/>	UserNum4,DD4	Other Info tab	
<input type="checkbox"/>	UserNum5,DD5	Other Info tab	
<input type="checkbox"/>	UserNum6,DD6	Other Info tab	
<input type="checkbox"/>	UserNum7,DD7	Other Info tab	
<input type="checkbox"/>	UserNum8,DD8	Other Info tab	
<input type="checkbox"/>	Vocational	Other Info tab	
	YearEndStatus	Other Info tab	Set to Blank for next year's NYR process



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