



**Synergy**<sup>TM</sup>

Education Platform

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***Synergy***<sup>®</sup>  
**Summer School  
Processing Guide**



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# NYR SUMMER SCHOOL PROCESS STEPS

A shortened version of the annual NYR process makes it easy to set up summer school sessions. For more information on New Year Rollover see: *Synergy New Year Rollover Process Guide*.

## STEP ONE: PREPARATION

### ✓ Define Summer School New Year Extension

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



Figure 1 District Setup Screen Options Tab  
Summer School Grid

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

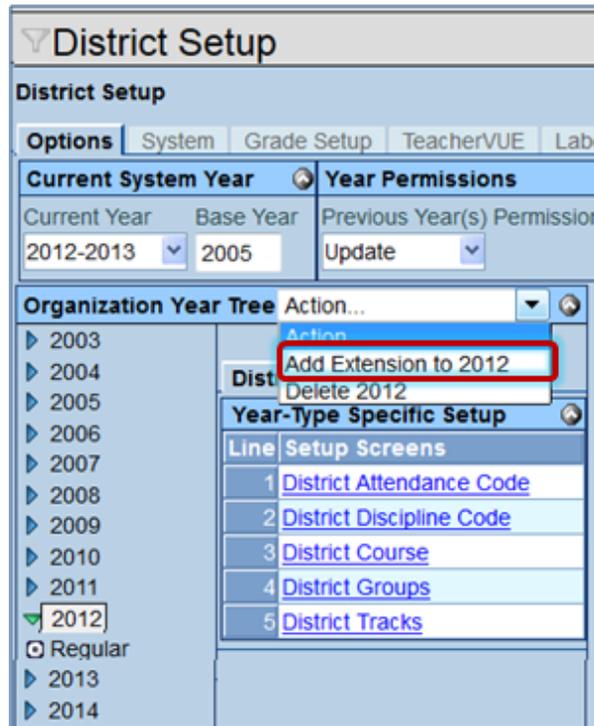


Figure 2 District Setup Screen Options Tab

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

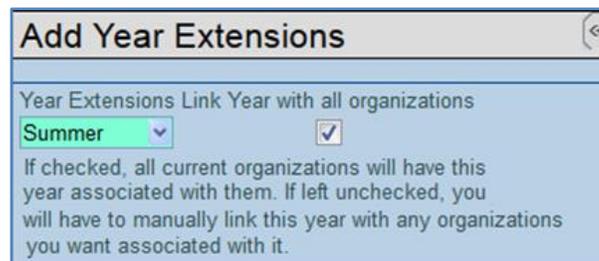


Figure 3 Add Year Extensions Screen

6. Select **Summer** from the Year Extension drop-down.
7. Check **Link Year with all organizations**, if appropriate. If checked, all schools will be linked to the summer school extension.



Figure 7 District Calendar Screen

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 log back into the summer extension and school, to make sure your calendars are there.

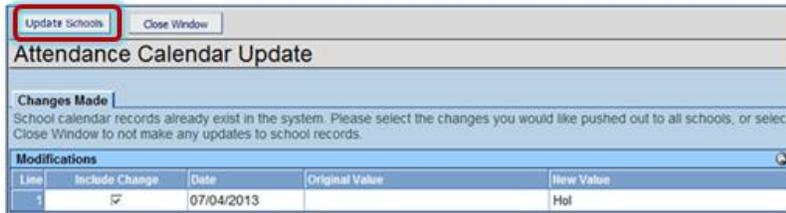


Figure 8 Attendance Calendar Update Screen

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

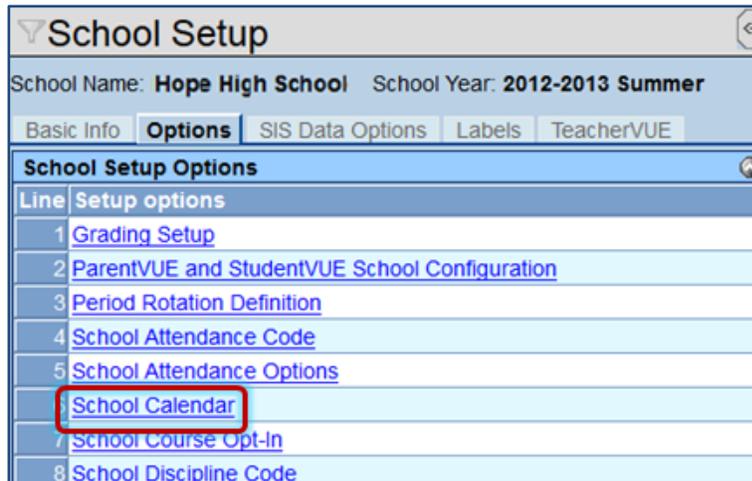


Figure 9 School Setup Screen Options Tab

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**.

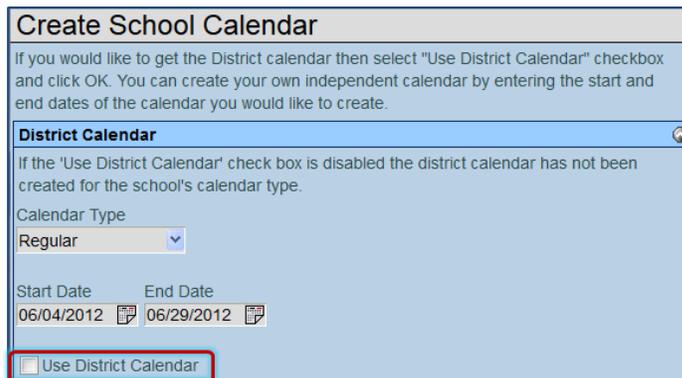


Figure 10 Create School Calendar Screen

✓ **School Setup**

1. Navigate to **Synergy SIS>System>School Setup**.
2. Complete the needed summer school settings on the Basic Info Tab. (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.

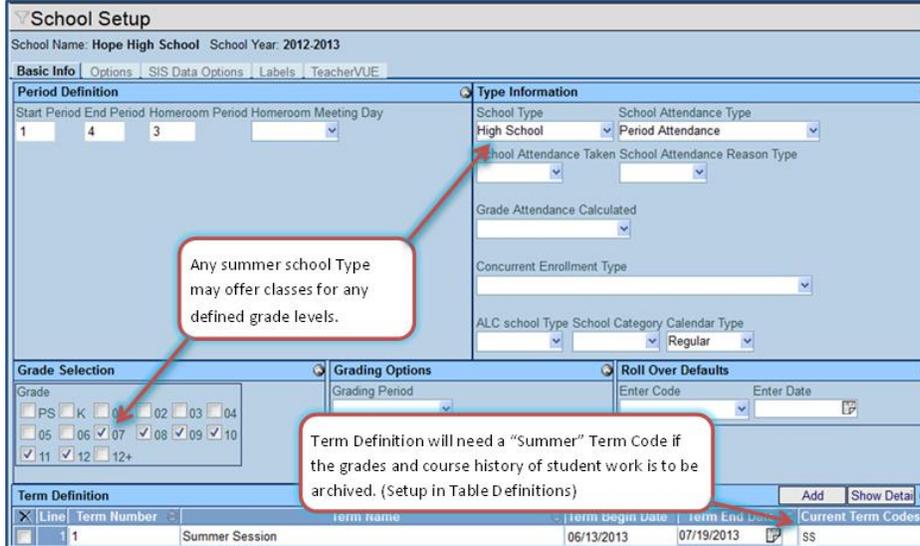


Figure 11 School Setup Screen

✓ **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 12 Student Screen Other Info Tab Summer School Grid

**STEP TWO: SETUP PROCESS SET**

1. Navigate to **Synergy SIS>System>Setup>New Year Rollover Setup**.
2. Create a Summer School Rollover Process Set. See: [Create Process Set](#)

✓ **Execute Tab**

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

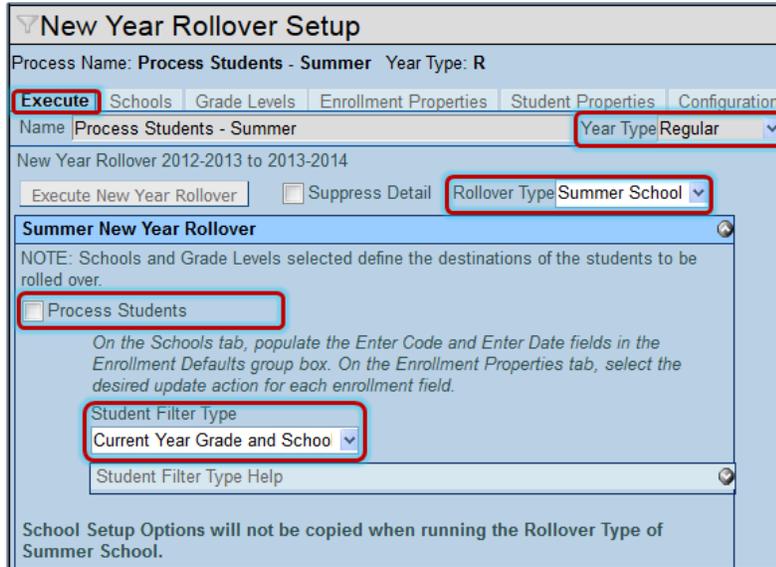


Figure 13 New Year Rollover Setup Screen Execute Tab

3. **Rollover Type** should be **Summer School**.

4. **Student Filter Type**

- Use **Current Year Grade and School** when rolling to the same school.
- Use Next Year Grade and School when changing schools.

**NOTE:** Both Student Filter Types may be used. The above recommendation is most effective.

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**.

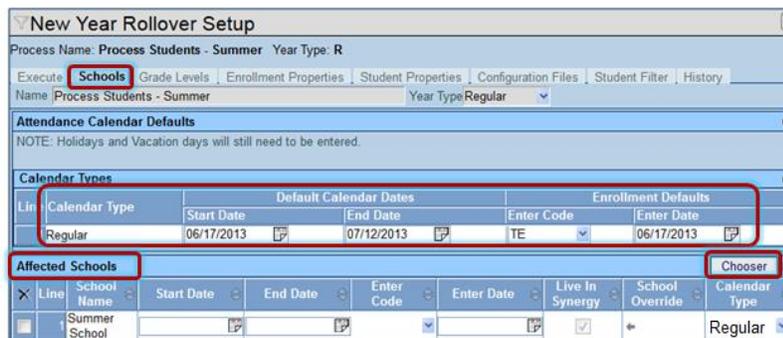


Figure 14 New Year Rollover Setup Screen Schools Tab

4. Click **Save**.

✓ Grade Levels Tab

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

2. Click **Save**.

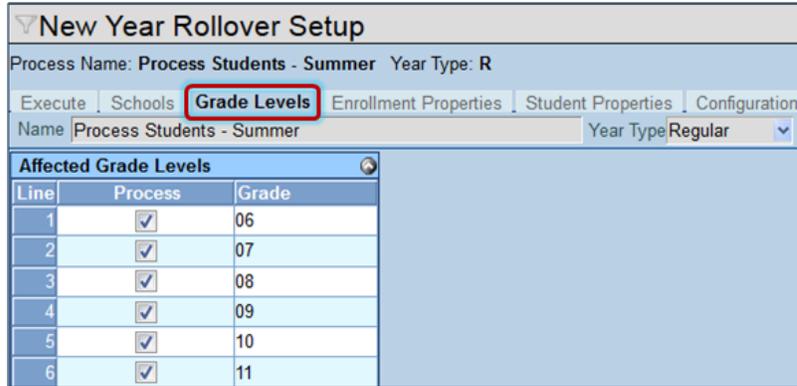


Figure 15 New Year Rollover Setup Screen Grade Levels Tab

**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.

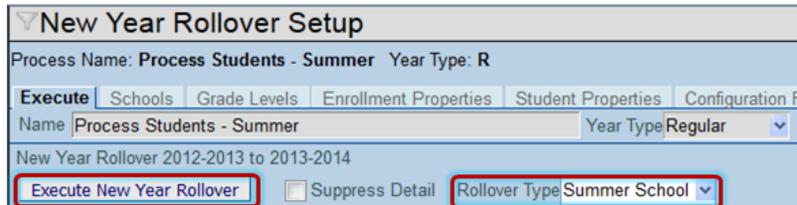


Figure 16 New Year Rollover Setup Screen Execute Tab

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 Staff Find 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.

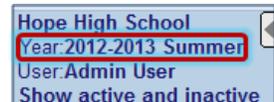


Figure 17 Focus

✓ **Opt In to Courses for the Summer School**

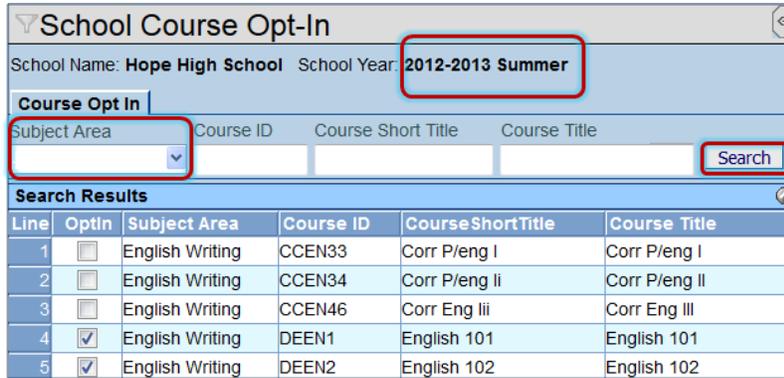


Figure 18 School Course Opt-In Screen

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.

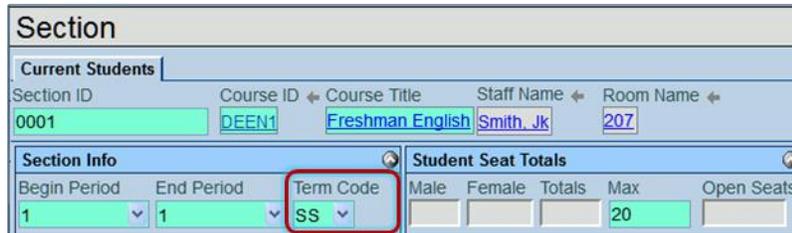


Figure 19 Section Add Screen

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

✓ **Schedule the Students**

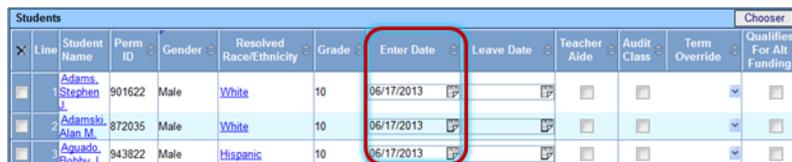


Figure 20 Section Screen Students Grid

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.

# APPENDIX

## How to....

### Create Process Sets

1. Click  at the top of the screen. The New Year Rollover Setup Add screen opens.

Figure 21 New Year Rollover Setup Add Screen

2. Enter a **Name** that reflects the process set being defined.
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 22 New Year Rollover Setup Screen Execute Tab

6. Click **Rollover Type** drop-down and select.
7. Click **Save**.

### Display a NYR Process Set Definition

1. Click , then click . All available New Year definitions display in the Find: Result screen.
2. Double-click the desired definition. Close the screen and the definition displays.

### Use Chooser

3. Click . In the window that opens, click . A complete list of items (schools, staff, etc.) display. To move all of them to the right side of the screen, click . Alternatively, double-click individual items to add them. Click .

### Use (Find Foreign Key)

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



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