Synergy SIS©

System Administrator Guide

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

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

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

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About This Guide

Document History

Date	Volume	Edition	Revision	Content
October 2009	1	1	1	Initial release of this document
March 2010	1	1	2	Updated to include changes from the November 2009 release and the February and March 2010 patches
June 2011	1	1	3	Updated to include changes from June 2011 release
July 2012	1	1	4	Updated list of compatible scanners
August 2012	1	1	5	Added instructions to combine and clean staff data via Synergy Generic Conversion
September 2012	1	1	6	Added instructions to new functionality on the District Setup screen, Systems tab.
April 2013	1	1	7	Updated for the March 2013 release of Synergy SIS 8.0

CONVENTIONS USED IN THIS GUIDE

Bold Text

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

Tip – Suggests advanced techniques or alternative ways of approaching the subject.

Note – Provides additional information or expands on the topic at hand.

Reference – Refers to another source of information, such as another manual or website

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

BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, be sure to review the system requirements and make sure the district's computer hardware and software meet the minimum requirements.

Caution: The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

Chapter One: OVERVIEW

This chapter covers:

- ► Administration Documentation
- ► Implementation Considerations
- ► Configuration Preparation
- ► Configuration Worksheets
- ► Initial Setup

ADMINISTRATION DOCUMENTATION

Synergy SIS system administration primarily consists of the initial configuration of various modules. Synergy SIS can be set up to match the operations of any school district from small to large. Synergy SIS is also customized to match the needs of each state, and the software offers different options depending on the state in which it is installed.

Synergy SIS can track many types of student records. Each type is tracked using a separate screen. The setup screens and data entry screens for related information are grouped into modules. This manual illustrates the setup of system-wide options in the **System** module. For each major module in the Synergy SIS system, there is a separate administrator guide:

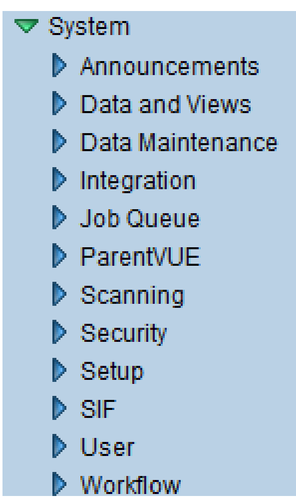
- **Attendance Administrator Guide** – how to set up the attendance codes as well as the school and district calendars.
- **Course History Administrator Guide** – how to configure the final student grades and transcripts.
- **Dashboard Guide** – how to set up dashboard widgets for each user’s home page to provide quick graphical reports.
- **Data Conversion Guide** – how to convert data from a previous student information system to the Synergy SIS system. It also shows how to convert data from other sources into Synergy SIS.
- **Discipline and Conference Administrator Guide** – how to set up the discipline and conference codes for the district.
- **Fees Administrator and User Guide** – how to set up the fees assessed for various student activities and groups.
- **Grade Book Administrator Guide** – how to set up the separate Grade Book software to track grades at the assignment level.
- **Grading Administrator Guide** – how to configure grading and progress periods, customize report cards, and set up the marks available for grading.
- **Health Administrator Guide** – how to set up immunizations and customize the codes used for tracking other health-related records.
- **Locker Guide** – how to customize locker records.
- **Master Schedule Builder Guide** – how to use the Master Schedule Builder to build the classes and student schedules.
- **New Year Rollover Administrator Guide** – how to prepare Synergy SIS for a new school year.
- **ParentVUE & StudentVUE Administrator Guide** – how to set up the separate ParentVUE & StudentVUE software that enables parents and students to look up their records using a web browser or mobile app.
- **Query & Reporting Guide** – how to create custom reports and queries using Synergy SIS.

- **Scheduling Guide** – how to set up courses and sections for each school and to create the student schedules.
- **Security Administrator Guide** – how to customize system security.
- **SIREN Report Designers Guide** – how to install and use the separate SIREN software to create sophisticated custom reports.
- Data reporting guides for various states – how to set up the reporting of student data to the state.
- **Student Groups Administrator Guide** – how to configure tracking for student groups such as sports teams and clubs.
- **Student Information Administrator Guide** – how to customize student enrollment options to match the district guidelines.
- **System Installation Guide** – how to install and upgrade the Synergy SIS software.
- **TeacherVUE Administrator Guide** – how to set up the TeacherVUE software.
- **Test History Administrator Guide** – how to configure the reporting and tracking of student tests.

For districts using Edupoint's special education software, there is a *Synergy SE – System Administrator Guide*.

For most modules, there is a user guide that explains data viewing and entry. Districts use these guides to train end users such as teachers and office staff.

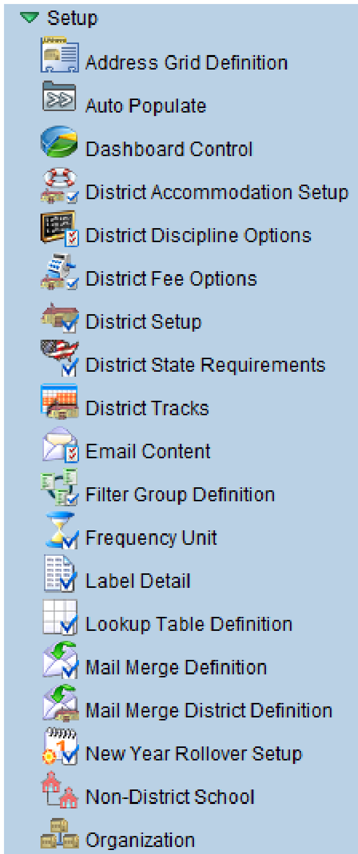
Many screens in the **System** folder are tightly integrated into the operation of a specific module. Some of those screens are covered in separate administrator guides.



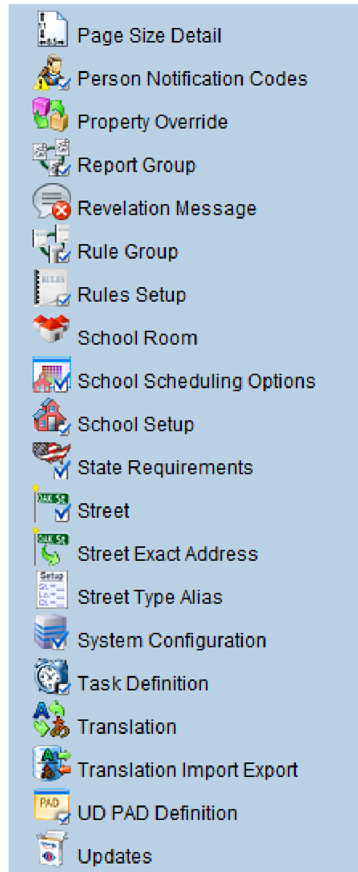
- **Announcements** – Chapter Five of this guide
- **Data and Views** – Chapter Seven of this guide
- **Data Maintenance** – the *Student Information Administrator Guide*. School Setup Copy is covered in Chapter Three of this guide.
- **Integration** – the *Data Conversion Guide*
- **Job Queue** – the *Query & Reporting Guide*
- **ParentVUE** – the *ParentVUE & StudentVUE Administrator Guide*
- **Scanning** – Chapter Six of this guide
- **Security** – the *Security Administrator Guide*
- **Setup** – The table on the next page outlines where each of these screens is covered.
- **SIF** – Chapter Nine of this guide
- **User** – Chapter Four of this guide
- **Workflow** – As of the release of Synergy SIS version 8.0, the guide for this new feature is not yet available.

This *Synergy SIS – System Administrator Guide* also covers the screens in the **Staff** module.

The **Setup** screens are covered in various administrator guides as follows:



Setup Screens



Setup Screens continued.

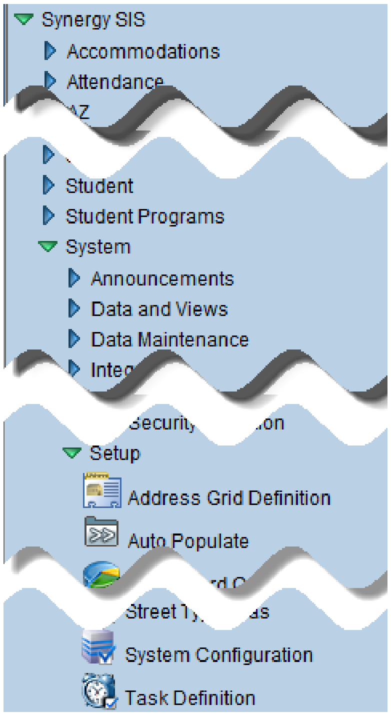
- **Address Grid Definition** – the *Student Information Administrator Guide*
- **Auto Populate** – Chapter Seven of this guide
- **Dashboard Control** – the *Dashboard Guide*
- **District Accommodation Setup** – the *Synergy SE – System Administrator Guide*
- **District Discipline Options** – the *Discipline & Conference Administrator Guide*
- **District Fee Options** – the *Fees Administrator and User Guide*
- **District Setup** – Chapter Three of this guide
- **District State Requirements** – the *State Data Reporting Guide*
- **District Tracks** – the *Attendance Administrator Guide*
- **Email Content** – Chapter Eight of this guide
- **Frequency Unit** – Chapter Nine of this guide

- **Label Detail** – Chapter Nine of this guide
- **Lookup Table Definition** – Chapter Nine of this guide
- **Mail Merge Definition** – Chapter Nine of this guide
- **Mail Merge District Definition** – Chapter Nine of this guide
- **New Year Rollover Setup** – the *New Year Rollover Administrator Guide*
- **Non-District School** – the *Course History Administrator Guide*
- **Organization** – Chapter Three of this guide
- **Page Size Detail** – Chapter Nine of this guide
- **Person Notification Codes** – the *Student Information Administrator Guide*
- **Property Override** – Chapter Seven of this guide
- **Report Group** – the *Query and Reporting Guide*
- **Revelation Message** – Chapter Seven of this guide
- **Rule Group** – Chapter Seven of this guide
- **Rules Setup** – Chapter Seven of this guide
- **School Room** – the *Scheduling Guide*
- **School Scheduling Options** – the *Scheduling Guide*
- **School Setup** – Chapter Three of this guide
- **State Requirements** – the *State Data Reporting Guide*
- **Street** – the *Student Information Administrator Guide*
- **Street Exact Address** – the *Student Information Administrator Guide*
- **Street Type Alias** – the *Student Information Administrator Guide*
- **System Configuration** – Chapter Two of this guide
- **Task Definition** – Chapter Nine of this guide
- **Translation** – Chapter Nine of this guide
- **Translation Import Export** – Chapter Nine of this guide
- **UD PAD Definition** – the *Query & Reporting Guide*
- **Updates** – Chapter Nine of this guide

The reports available in each module are described in the user guides. The security specific to each module is covered in the administrator guides.

A Note About Navigation

To indicate how to find screens, this guide uses shorthand like **Synergy SIS > System > Security > System Configuration**, which means: In the navigation tree (also called PAD Tree), click **Synergy SIS** (if necessary to open it), then **System** (if necessary), then **Security** (if necessary), and then **System Configuration**.



Synergy SIS Navigation Tree

If the Navigation Tree pane itself is not open, click the Tree button.

Tree Button

IMPLEMENTATION CONSIDERATIONS

A district must consider many things when implementing Synergy SIS.

How to transition to Synergy SIS?
One major decision is how to transition from the current student information system (SIS) to Synergy SIS. Some districts run a pilot test with just one school, and then convert all schools to Synergy SIS. Others transition groups of schools, such as elementary schools one year and high schools the next. Some districts run parallel systems for some time, with data kept current in both the prior SIS and Synergy SIS. For schools running a SASI system, Synergy SIS makes this easy with the SASI Synchronization tool.

How to convert the data?
Data conversion will be a critical part of the transition to Synergy SIS. Most districts run one or more test conversions prior to final conversion. Existing data may need to be cleaned up to ensure a smooth transition. Information about the data conversion process is in the *Synergy SIS – Data Conversion Guide*.

How to set up Synergy SIS?
As part of the conversion process, several configuration options in the current SIS can be converted to Synergy SIS. For example, existing staff records can be converted into Synergy SIS. If preferred, these options can be configured manually instead.

Will Synergy SIS be integrated with an LDAP system?
Synergy SIS can integrate with an LDAP system such as Microsoft's Active Directory. This can be helpful to staff so that they do not have to remember another user name and password. The integration can be either at the password level or at the group level. At the password level, the user names in Synergy SIS and the LDAP system must be identical and the password is gathered from the LDAP system when the user logs on to Synergy SIS. At the group level, groups in the LDAP system are synchronized with Synergy SIS user groups and all account information is copied to Synergy SIS as users are added to LDAP groups.

Will Synergy SIS be used to send email?
Synergy SIS can send various types of emails automatically. Reports can be scheduled and emailed to designated recipients. Teachers can send email to students' parents. These messages are routed through an existing district SMTP server.

Who does what?
A critical piece of the process is determining who is responsible for each setup and data entry process in Synergy SIS. This determines the structure of the user groups and the security definition. What role will the IT staff play in the initial implementation and the ongoing maintenance? Is there a dedicated student records system administrator? What modules do the registration staff set up and maintain? Who enters course and section information? Who can change student address and phone information?

How will training occur?
Edupoint offers several training options. Training can be provided in person to system administrators as well as end users. For each module, there is also a user guide that explains how to enter each type of record in the system. Consideration also should be given to when each group of users receives training. System administrators and the registration staff should receive their training before the teachers and other staff.

When to go "live"?
While test periods and pilot programs are good tools to ensure a smooth transition, be sure to include very specific criteria to determine when the Synergy SIS system is considered "live" and the old system is shut off.

Other considerations for each module are given in detail in the other guides.

CONFIGURATION PREPARATION

Before setting up the Synergy SIS system, gather the following information:

- The district address, phone, fax, logo, and state code information.
- A list of schools with their address, phone, fax, logo, and state code information, as well as the names of the principals.
- A list of staff, with all schools in which they work and their roles in the schools. Staff address and phone information, emergency contact information, and credentials can also be recorded.
- A list of the staff that will use Synergy SIS, and their duties within Synergy SIS.
- If LDAP will be used, the domain name and server UNC path for the LDAP server will be needed.
- If Synergy SIS will be used to send email, the address of the mail server to be used and the email address to use as the “From” address.

Other information required for each module is outlined in the administrator guides.

CONFIGURATION WORKSHEETS

To help with the configuration process, the following worksheets can document the chosen settings for key screens described in this guide. User group worksheets are also included in Chapter Four.

We recommend that as you read through this guide, you keep track of your desired settings on these worksheets.

System Configuration Screen – Security Tab

Email and Job Queue Options	
Email Enabled (Y/N)	
SMTP Email Server IP Address	
Default Email From Address	
SMTP Port Override	
Enable SMTP Authentication (Y/N)	
Job Queue	
Enable (Y/N)	
Multi-Level Administration	
Enable (Y/N)	
Messaging	
Bulk Mail Enable (Y/N)	
Time to begin bulk emailing	
Keep History of Bulk Emails to Each Person (Y/N)	
Contact Type for Email History	
Immediate Email Enable (Y/N)	
Immediate Start Time	
Interval in hours	
Keep History of Immediate Emails to Each Person (Y/N)	
Blind Copy Sender on Immediate Emails (Y/N)	
Default Point of View Home Page	
View Name	
Tracking	
Track User Login Attempts	
Password Security Options	
Minimum password length	
Number of days before password expires	
Require both alpha and numeric characters to exist in the password (Y/N)	
Force uniqueness of passwords up to X passwords	
Force uniqueness of passwords up to X number of days	
Number of invalid login attempts before user is disabled	

Default Entry Access Times		***Access Time Period***	
Day of Week	**Enabled (Y/N)**	**Begin**	**End**
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			

Saturday			
Sunday			
Pass Through Authentication			
Allow pass through authentication for logins (Y/N)			
LDAP Integration			
Using LDAP (Y/N)			
LDAP Server Type			
Integration Type			
Domain Name			
Server Path			
Secured via SSL (Y/N)			
User Property			
Role Property			
Staff Types to allow LDAP to add staff school year entries			
User Groups to Administer Options			
Hide users who belong to user groups that a user is not allowed to administer even if they belong to a user group that a user is allowed to administer (Y/N)			
Data Entry Options			
Namespaces to retain view data on save when another user has changed the same data			

System Configuration Screen – Options Tab

Page Definitions	
Support Page	
Help Page	
Contact Us	
Help System	
Enable Context Sensitive Help (Y/N)	
Help System	
Help System URL	
Map Options	
Enable Address Mapping (Y/N)	
Address Map Type	
User Session State Management	
Time, in minutes, of inactivity before a lock screen is shown	
Time, in minutes, of inactivity before all child windows are closed	
Override the default Lock Screen text to the following:	
Pre-Installation Backup of MSSQL Server Database	
Disable the pre-installation backup of the MSSQL Server database (Y/N)	
If the pre-installation backup is NOT disabled, enter the override location	
Capture User Performance Statistics	
Enable User Performance statistics (Y/N)	
Schools Interoperability Framework (SIF)	
Email the following address(es) on failure	
Hours to Recur	

Central Printing Defaults	
Enable Central Printing (Y/N)	
Job Description	
Number of Copies	
Job Type	
Three Hole Punch (Y/N)	
Paper Size	
Output Path	
Application Login	
Allow Use of Override Login Page (Y/N)	
Display Options	
Allow HTML in Properties (Y/N)	
Display inactive lookup values in dropdowns and checkboxes (Y/N)	
List Options	
Drop-Down Item Search Option	

Organization

District	
District Name	
District Number	
County Code & County	
District Address	
District Phone	
District Phone (2^{nd})	
Website address	
Logo	
Level 2 Organization (Elementary Schools, for example)	
Organization Name	
Organization Abbr Name	
District of Service	
Address	
Phone	
Phone 2	
Parent Organization	
Logo	
Level 2 Organization (Elementary Schools, for example)	
Organization Name	
Organization Abbr Name	
District of Service	
Address	
Phone	
Phone 2	
Parent Organization	
Logo	
School #1	
School Name	
School Code	
School Abbr Name	
Logo	
Principal	
Address	

Phone	
Fax	
Counselor Dept Phone	
SIS School Code	
State CTDS Number	
Alt Funding School Code	
Website	
Live in Synergy SIS(Y/N)	
Hide Organization(Y/N)	
Alternate District CTDS	
Use Alternate CTDS(Y/N)	
Alternative School (Y/N)	
Parent Organization	
Head Nurse Email	
Safety Specialist Email	
School #2	
School Name	
School Code	
School Abbr Name	
Logo	
Principal	
Address	
Phone	
Fax	
Counselor Dept Phone	
SIS School Code	
State CTDS Number	
Alt Funding School Code	
Website	
Live in Synergy SIS (Y/N)	
Hide Organization (Y/N)	
Alternate District CTDS	
Use Alternate CTDS (Y/N)	
Alternative School (Y/N)	
Parent Organization	
Head Nurse Email	
Safety Specialist Email	

District Setup Screen – Options Tab

Current System Year	
Current Year	
Base Year	
Year Permissions(None/Update/View)	
Previous Year(s) Permission	
Current Year Permission	
Next Year(s) Permission	
Summer School	
Summer School Year	
Summer School Type	

District Setup Screen – System Tab

Enrollment Options		
New Student Add Type		
Permanent ID Update Type		
Allow “No Show”		
Require Summer Withdrawal Code/Date for “No Show”		
Do Not Clear Summer Withdrawal Code and Date		
Show SASIXP Enrollment History		
Validate SASIxp Enrollment History		
Show Emergency Contact as Lookup		
Show User Code As Lookup		
Show User Num As Lookup		
Show Advanced Options On Inactive Student		
Delete Course Request on No Show and Inactivate		
Delete New Year Enrollment on No Show of Student		
Keep Concurrent Enrollment On Inactive Student		
Require Withdrawal Reason Code		
Show Withdrawal Reason Code		
Show Withdrawal Reason Text Message on Elementary School Types		
Withdrawal Reason Text		
Allow Simple Delete of Enrollment		
Disable New Year Activation		
Show Residence Properties on Student View		
New Year Def used when adding new students		
Enrollment Date Validation		
Exit Programs/Services On Student Inactivation		
Auto-Generate Needs Transactions		
Suppress Needs With Expired Programs		
Default Needs Exit Code		
Default ELL Exit Code		
Default SPED Exit Code		
Default GATE Exit Reason		
Use Grid For Transportation Requirements		
Force One Race To Be Selected Even If Hispanic		
Force one race to be selected even if Hispanic		
Show District Of Residence as Lookup		
Show County as Lookup		
Show Non-District School Lookup As A Find View		
Require Find Before Adding New Parents		
Require Enrolling Parent Validations		
Disable Add, Drop, and Transfer		
Disable Ability to Add, Drop, And Transfer		
Disabled Days	***Disabled Time Period***	
Day of Week	**Begin**	**End**
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Address Options	
Allow to prompt user to synchronize address and/or phone number changes for all family members living together when one member's address and/or phone number is changed.	
Allow user to change a sibling address and/or phone number even though the user may not have organizational access to do so.	
Track student, parent, and staff address changes	
Require address change date when student home address is changed	
Enable School Grid Code By Grade Level Override	
Address Validation Type	
Enforce Validation on a +4 Portion of Zip Code	
Disable clean/parse and address validation for home addresses	
School Of Residence Option	
Require Attendance Reason Code	
Clear School of Residence on launch of Student Add view	
Do Not Clear School of Residence Attendance Reason Code and Date on Address Change	
Bulk Mailing	
Postage Text	
Barcode ID	
Service Type ID	
Padded Mailer ID Length	
Mailer ID	
Grading Setup	
Minimum Days Enrolled Grading Threshold	
Include in Grade Option	
GPA Filter Option	
Always update completed credit on mark change in Student Course History	
Other Options	
Discipline Type	
Student Notification	
Disable Unique State Number	
Allow Negative Seat Totals	
Enable Announcement Dismissal	
Incident Violation Display	
Badge Number Update Type	
Adult ID Update Type	
Fee Total Type	
District Group History Filter	
Enable Historical Tracking of Staff In Sections	
Auto Assign District Staff To Schools	
Validate Student Classes	
Student Profile Report Release Statement	
Class Attendance Signature Text	
Course ID Print Width	
Use Course Short Title	
Parent Filtering	
Show Course History Mark As Lookup	

Do not allow same parent to be added to a student with multiple relationships	
Use Group State Reporting	
Display Student Test ID	
SIS Data Import Options	
SIS Data Import Error Email Contact	
Graduation Requirements	
Enable Verified Credit	
Communication Options	
Enable Streams	
Photo Attach	
Photo Attach URL Override	

District Setup Screen – Grade Setup Tab

Graduation Grade			
Grade	***Next Grade***	***Years Until Graduation***	***ADA Group***

District Setup Screen – TeacherVUE Tab

The number of days the user can take attendance	
Allow Teacher to Send Communications in TeacherVUE	
Enable Special Ed IEP Access in TeacherVUE	

District Setup Screen – Labels Tab

Grading Labels	
Default Grading Label	

District Setup Screen – Reports Tab

Report Options	
Report Number	
Report Name	
Show Footer Boiler Plate	
Footer Boiler Plate	
Phone Number Options	
Mask Phone Numbers	

District Setup Screen – Mobile Apps Tab

Disable Mobile Apps	
AdminVUE App	
ParentVUE App	
StudentVUE App	
TeacherVUE App	

School Setup Screen – Basic Info Tab

Period Definition				
Start Period				
End Period				
Homeroom Period				
Homeroom Meeting Day				
Type Information				
School Type				
School Attendance Type				
School Attendance Taken				
School Attendance Reason Type				
Concurrent Enrollment Type				
ALC School Type				
School Category				
Calendar Type				
Grade Selection *(list grades checked)*				
Grading Options				
Grading Period				
Rollover Defaults				
Enter Code				
Enter Date				
Term Definitions				
Term #	**Term Name**	**Begin Date**	**End Date**	**Current Term Codes**
Track Selection (list tracks checked)				
Policy Code				
School Policy Codes				
Other Info				
Exclude from State Reporting				
Validate Student Classes				
Improvement Status				
Generic Teacher Aide Course				
Course ID				
Course Title				
Credit Given				

Programs/Needs			
FRM Program			
Description	**Offered At School**	**All Students Participating**	**Levels**

School Setup Screen – SIS Data Options Tab

SIS Options	
Old SIS Number	
Next Available SIS Number	
Path to SIS Data Files	
Conversion Server	
Push back to old SIS system (Y/N)	

School Setup Screen – Labels Tab

Grading Labels	
Default Grading Label	

School Setup Screen – TeacherVUE Tab

Global Attendance Security	
Primary Staff	
Additional Staff	
Global Grading Security	
Primary Staff	
Additional Staff	
Lunch Counts	
Take Lunch Counts for Homeroom Classes (Y/N)	
Lunch Description 1	
Lunch Description 2	
Lunch Description 3	
Lunch Description 4	
Lunch Description 5	
Lunch Description 6	
Lunch Description 7	
Lunch Description 8	
Lunch Description 9	
Lunch Description 10	

Staff Screen – Required Information

Last Name	**First Name**	**Type**	**Gender**	**Role**

User Screen – Default Information for Demographics Tab

Login	
Force Password Change On Next Login	
Exempt From LDAP	
Preferences	
Default Mode (Inquiry/Edit)	
Paging Size	
Paging Row Size	
Show Quick Launch	
Debug Expiration (Hours from Now)	
POV Home Page	

User List

Last Name	First Name	Login Name	Email	User Groups

INITIAL SETUP

When setting up Synergy SIS for the first time, the recommended order in which the system should be configured is:

1. Set up the **System Configuration** screen.
2. Set up the district's organization structure in the **Organization** screen.
3. Complete the **District Setup** screen.
4. Configure each school in the **School Setup** screen.

> **Tip** – The **Options** tab of the **School Setup** screen contains a useful set of links to screens that are important for school setup.

5. Enter the **Staff** information for at least the core users involved in the setup of Synergy SIS. Others can be converted from the old SIS.
6. Set up the **User Groups.**
7. Enter the **User** information.
8. Configure **Security** as outlined in the *Synergy SIS – Security Administrator Guide*.
9. Set up the state-related information as outlined in the state data reporting guide for your state.
10. Define the student options as outlined in the *Synergy SIS – Student Information Administrator Guide*.
11. Configure the **Attendance** setup as outlined in the *Synergy SIS – Attendance Administrator Guide*.
12. Define the **Schedule** as outlined in the *Synergy SIS – Scheduling Guide*.
13. Set up the **Grading** periods as outlined in the *Synergy SIS – Grading Administrator Guide*.
14. Configure the **Course History** setup as outlined in the *Synergy SIS – Course History Administrator Guide*.
15. Define the **Discipline and Conference** options as outlined in the *Synergy SIS – Discipline and Conference Administrator Guide*.
16. Set up other areas of Synergy SIS as needed, such as the TeacherVUE software.

Concurrently with those activities, Edupoint personnel perform data conversion from your previous system or other data source.

Chapter Two: SYSTEM CONFIGURATION

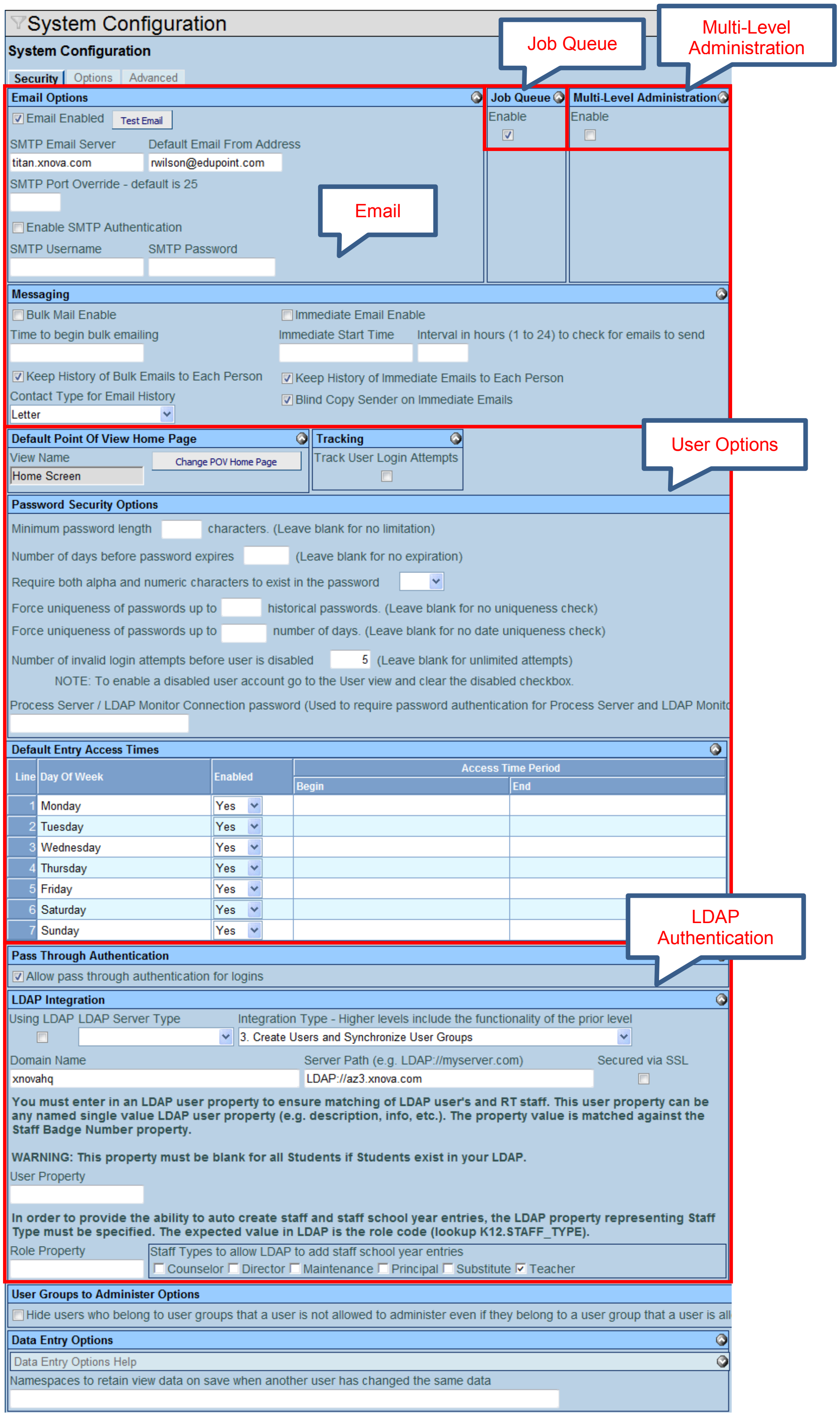
This chapter covers:

- ► Email
- ► Job Queue
- ► Multi-Level Administration
- ► User Options
- ► LDAP Authentication
- ► Page Definitions and Help System
- ► Address Mapping Options
- ► System Cache
- ► Pre-Installation Backup
- ► Schools Interoperability Framework (SIF)
- ► Central Printing Defaults
- ► Application Login
- ► Display Options
- ► List Options
- ► Advanced

System configuration for Synergy SIS defines several areas of the program. For example, it can create a link to the existing email server or link the user accounts in Synergy SIS to an existing LDAP server. It can also define several options for how users access Synergy SIS.

To access system configuration, go to **Synergy SIS > System > Setup > System Configuration**.

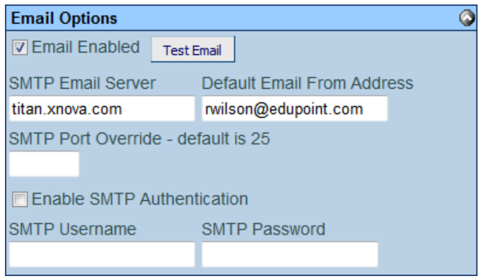
The **System Configuration** screen has multiple tabs, and each tab has multiple sections. Each section controls a different Synergy SIS function. The setup of key areas, outlined in red in the illustration below, is described in this chapter.



System Configuration screen, Security tab

EMAIL

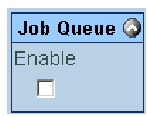
Several areas within Synergy SIS can be configured to send email. For example, parents can receive automatic notices when their children are absent or are part of a disciplinary incident. Staff can also send email manually to parents and students. For an overview of email configuration and customization, refer to Chapter Eight of this guide.



Email Options

JOB QUEUE

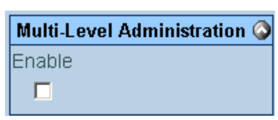
The Job Queue lists all jobs that been submitted to process servers and enables administrators to cancel or pause jobs. It is highly recommended to enable this function to improve website performance. To enable the Job Queue, check the **Enable** box. For more information about monitoring and administering the Job Queue, see the *Synergy SIS – Query & Reporting Guide*.



Job Queue

MULTI-LEVEL ADMINISTRATION

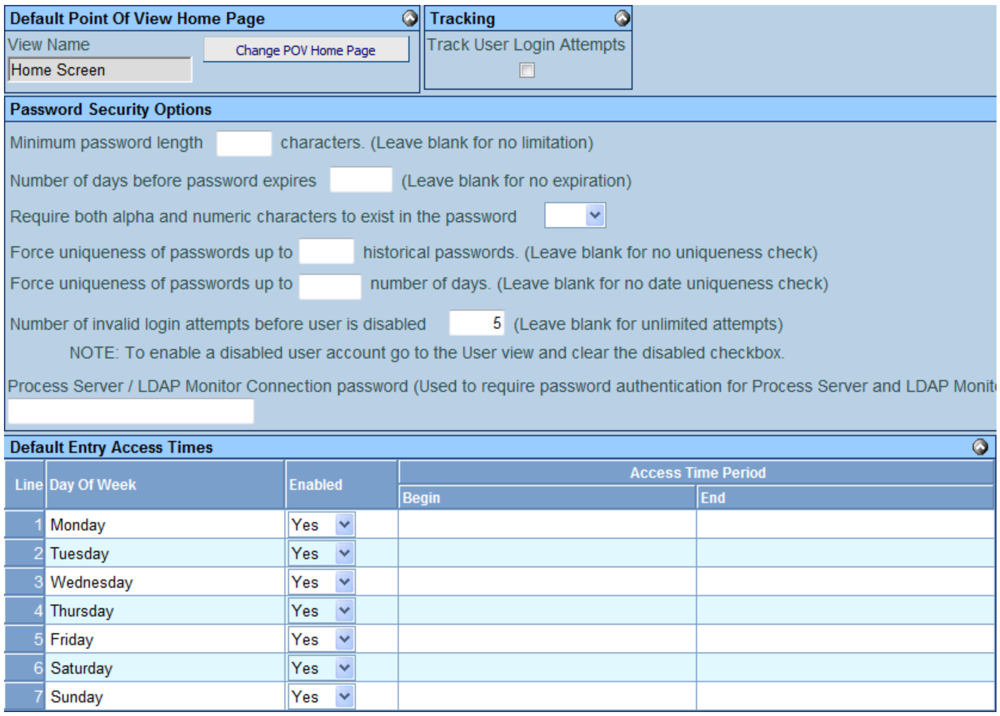
Multi-level administration is used with Synergy SE-only districts to enable multi-district administration. It is not used with Synergy SIS districts.



Multi-Level Administration

USER OPTIONS

Several options can be configured that impact the management of Synergy SIS users. On the **Security** tab, the default home page can be changed, login attempts tracked, password options set, and access times defined.



User Options

The **Point of View Home Page** is the screen that appears when a user logs in to Synergy SIS. The default screen displays announcements, the Tasks list, and Dashboard widgets. You can select a different default home page for your users, such as the **Student** screen, and override this default by setting pages for specific user groups or individual users. To change the global home page, click the **Change POV Home Page** button.

Tracking logs each attempt to log in to Synergy SIS in a table in the database. This can increase the database size dramatically, so it is recommended to enable this function only when diagnosing a problem. The tracking data can be accessed directly from the database.

Password Security sets criteria for native Synergy SIS passwords. If you use LDAP integration for Synergy SIS login, the password security setup here does not affect the LDAP password setup. The following criteria can be set for Synergy SIS passwords:

- **Minimum password length** – the minimum number of characters in a user password. Leave this blank for no minimum length.
- **Number of days before password expires** –the number of days a user may use a password before being forced to change it. Leave this blank for no expiration.
- **Require alpha and numeric characters in password** – set to **Yes** to force users to select passwords that have both letters and numbers.

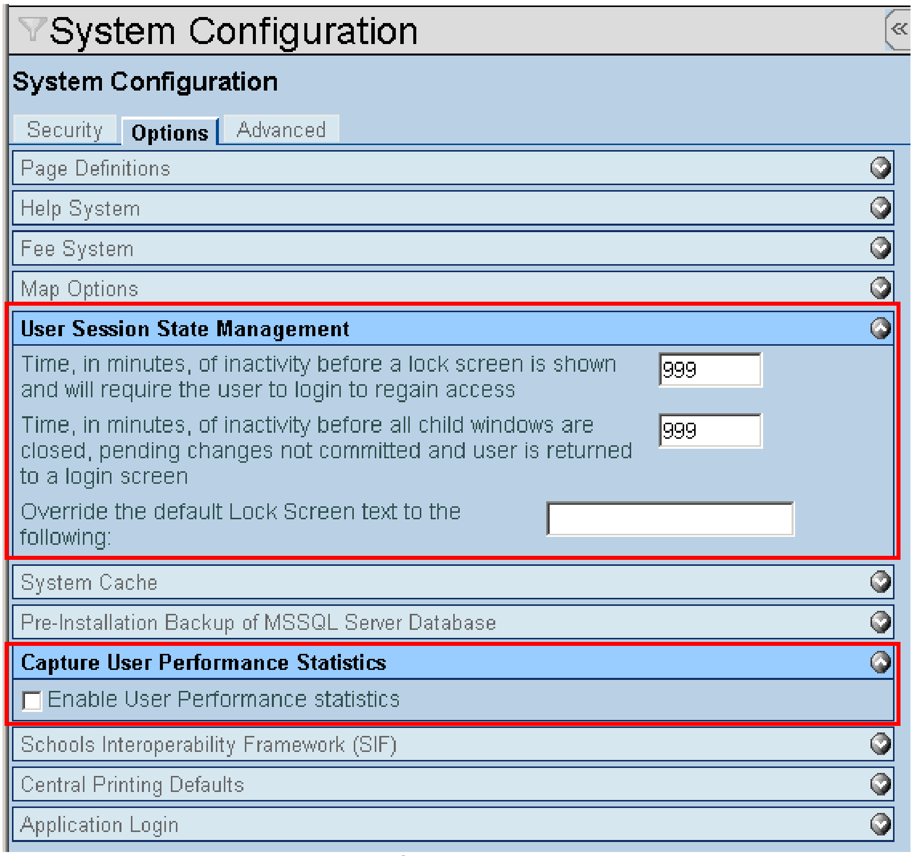
- **Force unique passwords up to X historical passwords** – a user forced to select a new passwords cannot use any of their X previous passwords.
- **Force unique passwords up to X days** – a user forced to select a new password cannot use one that they used in the last X days.
- **Number of invalid login attempts** – after this number of incorrect login attempts, the user account is disabled until a system administrator re-enables the account. The account is enabled on the **User** screen. If this is blank, the account is never disabled; an unlimited number of failed attempts can be made.
- **Process Server / LDAP Monitor Connection password** – If a password is required for Synergy SIS to connect to LDAP, enter it here.

You can restrict the times during which Synergy SIS can be accessed.

To enable access for a day, click **Yes** in the **Enabled** list. If **Enabled** is set to **No**, users cannot log in to Synergy SIS on that day.

To limit logins to certain times of day, enter the start time in the **Begin** column and the end time in the **End** column for each day. Times are in HH:MM AM/PM format. Entry Access Times can also be set for each user group or each individual user, on the **Security Settings** tab of the **User Groups** and **User** screens. The user settings override any group or global settings, and the group settings override the global setting.

On the **Options** tab, there are two additional options that related to user management – **User Session State Management** and **User Performance Statistics**.



Options Tab

User Session State Management controls when the Synergy SIS window is "locked" due to user inactivity. This is similar to a screen saver. After there has been no activity in any open Synergy SIS window for a specified time, the window is locked until the user re-enters their password. This helps to protect the data from unauthorized access if a staff member walks away from their computer without logging out of Synergy SIS.

Generally, this is set in two levels. The first level: A lock screen is shown, and the user is required to re-enter their password to regain access to Synergy SIS. The second level: All secondary Synergy SIS windows are closed, and the main window is returned to the Synergy SIS login screen. When this occurs, any data change that has not been saved is lost. To set when these events occur, enter the number of minutes of inactivity in the boxes provided. The maximum number of minutes is 99999.

To customize the text shown in the lock screen, enter the new text to be displayed in the **Override the default Lock Screen text to the following** box.

Lock Screen

User Performance Statistics tracks the number of minutes and seconds it takes to load a screen, and logs this information in a table in the database. This can increase the database size dramatically, so it is recommended to only enable this function when diagnosing a problem. The performance data can be accessed directly from the database.

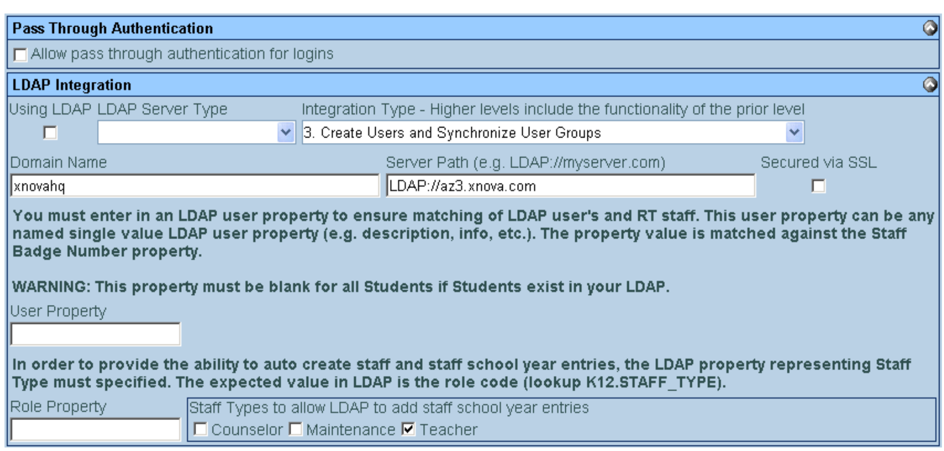
LDAP AUTHENTICATION

Instead of using native Synergy SIS user accounts, you can integrate with the network's existing LDAP (Lightweight Directory Access Protocol) installation. Synergy SIS integrates with Microsoft Active Directory and Novell eDirectory.

Caution – If the integration is not set up correctly, everyone can be locked out of Synergy SIS. To prevent this, it is recommended that before you configure this option, you set an account that can modify system configuration as **Exempt from LDAP** in the **User** screen. (See page 156.) The Admin user is permanently exempt from LDAP and cannot use pass-through authentication.

LDAP integration can occur at any of three levels.

- Integration Type 1: User accounts and user groups are manually created in Synergy SIS, but users are authenticated with the same password used in the LDAP directory. For the end user, this appears as if they have one account for both systems. Administrators need to set up staff, users, and user groups in Synergy SIS.
- Integration Type 2: User groups in Synergy SIS are synchronized with the groups in the LDAP directory. This also includes the pass-through authentication from the first level. When the user groups are synchronized, group memberships in the LDAP directory are synchronized with the corresponding groups in Synergy SIS. Administrators need to set up staff, users, and user groups in Synergy SIS, but group membership needs to be modified in LDAP only, not in both systems.
- Integration Type 3: Users and group memberships in Synergy SIS are created based on the information in the LDAP directory, and pass-through authentication is enabled. Staff are automatically assigned to schools and years based on their group memberships. Administrators need to set up staff and user groups in Synergy SIS, but do not need to create user accounts, modify group memberships, or create staff school assignments in Synergy SIS.



LDAP Integration Options

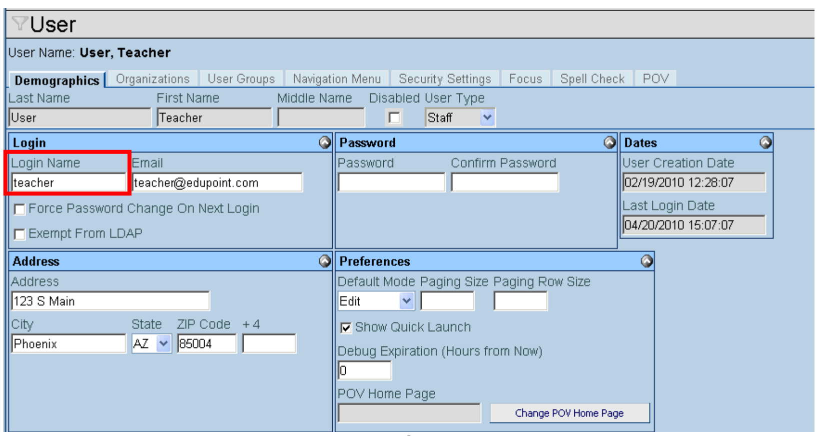
To set up LDAP authentication for all integration types:

1. Check the **Allow pass through authentication for logins** box.
2. Check the **Using LDAP** box.
3. In the **LDAP Server Type** box, select the type of LDAP server used.
4. In the **Domain Name** box, enter the fully qualified domain name, such as *edupoint.local*.
5. In the **Server Path** box, enter the path to the server running the LDAP directory, such as *LDAP://servername.local*. In Active Directory, this would be a domain controller or the server running the Active Directory Application Mode (ADAM) service. In Windows Server 2008, the ADAM service is called Active Directory Lightweight Directory Services (ADLDS). In Novell eDirectory, it is the server that has the LDAP Services loaded.

To set up Integration Type 1:

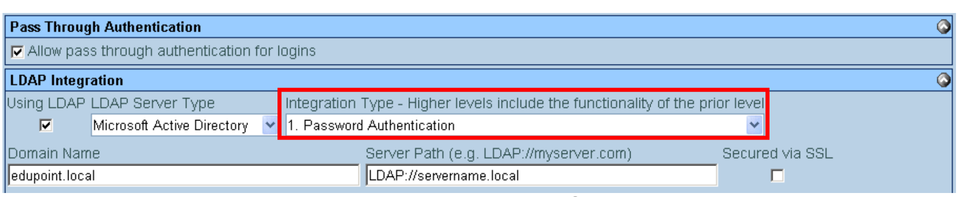
1. Create the staff, users, and user groups as outlined in Chapter Four.

   The user names in the LDAP directory and in Synergy SIS must be identical for the pass-through authentication to work. When creating users in Synergy SIS, enter the user logon name from the LDAP directory as the **Login Name** in Synergy SIS. The password can be set to anything in Synergy SIS, as it will not be used.



User Screen

2. On the **System Configuration** screen, in the **Integration Type** list, select **1. Password Authentication**.



Integration Type 1 LDAP Setup

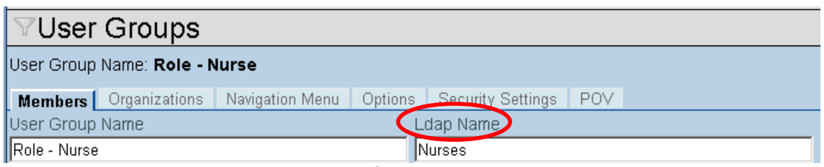
Note – The RT LDAP Monitoring Service is not required for the integration type **1. Password Authentication**. For the other integration types, the RT LDAP Monitoring Service must be installed and configured as outlined later in this chapter.

To set up Integration Type 2:

1. Create the staff, users, and user groups as outlined in Chapter Four.

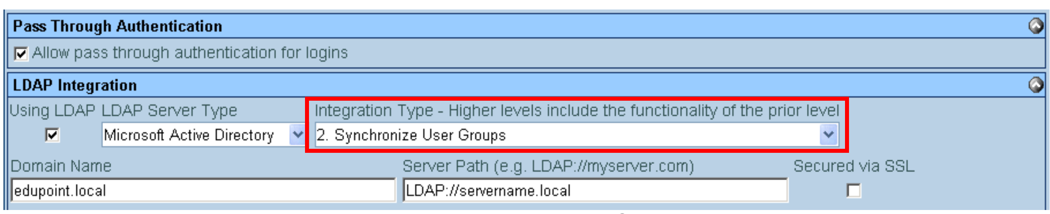
   The user names in Synergy SIS must be the same as in LDAP.

2. On the **User Groups** screen, make sure that each user group that will be synchronized with the LDAP directory is assigned an **LDAP Name**. Leave the **LDAP Name** blank for those groups that should not be synchronized.



User Groups screen

3. On the **System Configuration** screen, in the **Integration Type** list, select **2. Synchronize User Groups**.



Integration Type 2 LDAP Setup

Note – User groups are fully synchronized between Synergy SIS and the LDAP directory. A user removed from a group in LDAP is removed from the corresponding group in Synergy SIS.

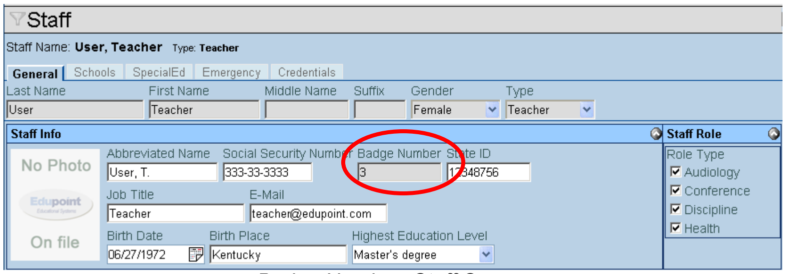
To set up Integration Type 3:

1. Create the staff and user groups as outlined in Chapter Four.

   Create users in Synergy SIS only for staff types that will not be synchronized with LDAP.

2. Select a property assigned to users in the LDAP directory that can be used to store badge numbers from the **Staff** screen in Synergy SIS. Enter the LDAP name of that property in the **User Property** box in the **System Configuration** screen.

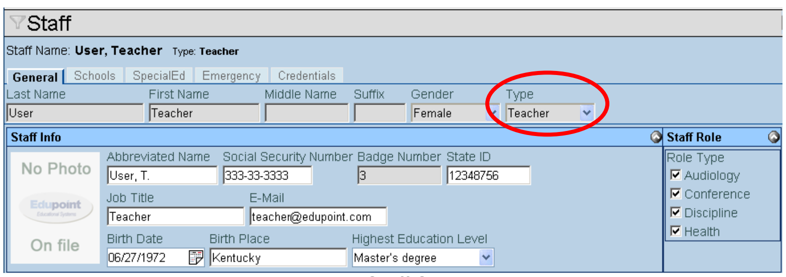
3. Make sure that all staff accounts that will be synchronized have been assigned badge numbers and that each badge number is unique. Use the Mass Assign Badge Numbers function if needed, as outlined in Chapter 4.



Badge Number, Staff Screen

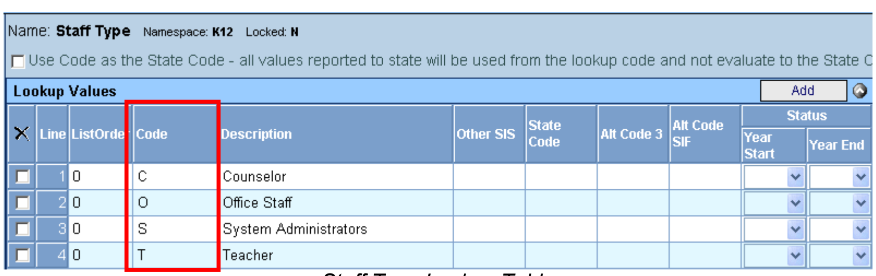
4. Enter the badge number from Synergy SIS into the selected property of the user accounts in the LDAP directory for all staff that need user accounts in Synergy SIS. If the user account in LDAP should not have access to Synergy SIS, such as student accounts, be sure to leave that property blank.

5. Select a property assigned to users in the LDAP directory that can be used to store the **Type** from the **Staff** screen in Synergy SIS. Enter the LDAP name of that property in the **Role Property** box on the **System Configuration** screen.



Type, Staff Screen

6. Enter the staff types from Synergy SIS into the selected property of the user accounts in the LDAP directory for all staff that need user accounts in Synergy SIS. The value stored in LDAP must be the code for the staff type and not the description. The Staff Type codes are in the **K12.Staff Type** lookup table.



Name: Staff Type Namespace: K12 Locked: N

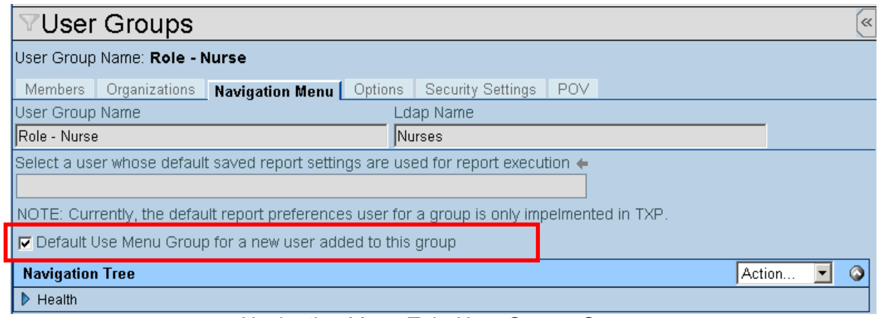
Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C

Lookup Values

Line	ListOrde	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Year End
1	0	C	Counselor						
2	0	O	Office Staff						
3	0	S	System Administrators						
4	0	T	Teacher						

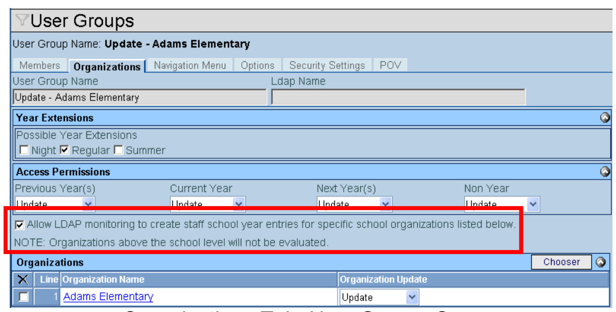
Staff Type Lookup Table

7. Set up the user groups in Synergy SIS to set the **Default Use Menu Group** and **Allow LDAP monitoring to create staff school year entries as needed**. On the **Navigation Menu** tab of the **User Groups** screen, the **Default Use Menu Group** setting automatically sets newly created users to use the menu bar group created for the user group. This does not change the settings for existing users.



Navigation Menu Tab, User Groups Screen

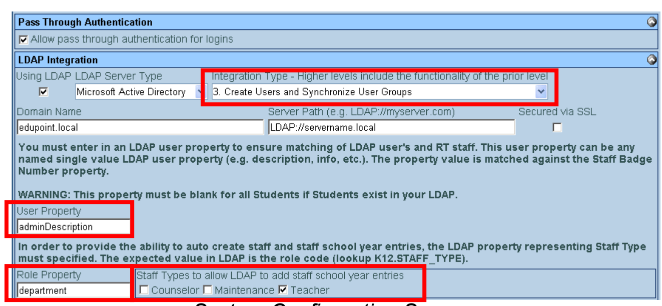
8. On the **Organizations** tab of the **User Groups** screen, select **Allow LDAP Monitoring to Create Staff School Year Entries** to have the LDAP synchronization assign the first school listed on the tab to all users assigned to the user group in LDAP.



Organizations Tab, User Groups Screen

9. On the **System Configuration** screen, under **Staff Types to allow LDAP to add staff school year entries,** check the box for each staff type that will be automatically assigned to schools in Synergy SIS based on the synchronization.

10. In the **Integration Type** list, select **3. Create Users and Synchronize User Groups**.



System Configuration Screen

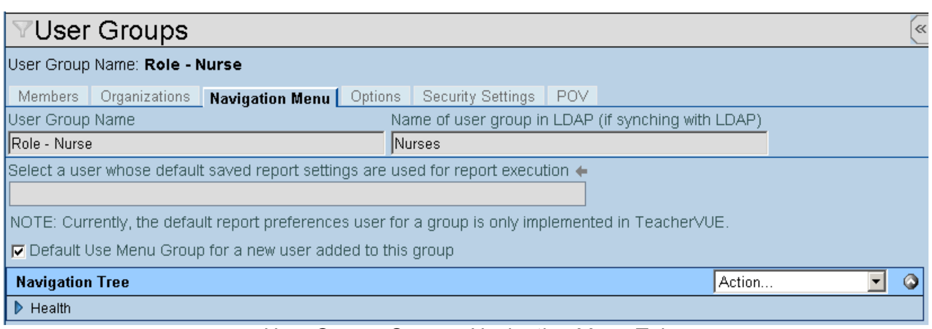
Tip: When selecting the properties to be used in LDAP to store the badge numbers and staff types, it will be much easier to update and maintain properties that are already listed on the User Account properties dialog box.
Many organizations do not use all of the properties on the General or Organization tab in Active Directory. However, properties can be added to this dialog box or even added to the LDAP schema if needed.

Once the properties are selected, discover their actual LDAP names (which may or may not be the same as the label for the property on the dialog box). In Microsoft Active Directory, the LDP tool or the ADSIEdit tool can be helpful in examining LDAP properties. These tools are add-ons from the Support Tools for Server 2003 or earlier, but are included in the installation for Server 2008. In Novell eDirectory, LDAP objects can be configured using either the ConsoleOne LDAP snap-in or the LDAP Management task in Novell iManager.

To quickly update all user accounts with the new values, check out the ADModify tool. It can be obtained from Microsoft Support Services or downloaded from a third-party website.

The staff type must also selected on the **System Configuration** screen. When the user account is created through LDAP synchronization, the account will be created as follows:

- The Login Name and Email address are entered on the **Demographics** tab of the **User** screen with the values from LDAP. The **Default Mode** is set to **Inquiry**.
- The account is assigned to the user groups assigned in LDAP that match Synergy SIS user groups on the **User Groups** tab of the **User** screen. If one or more of the assigned user groups in Synergy SIS have the setting **Default Use Menu Group** checked, the **Use Menu Group** box is checked on the **User Groups** tab, and the user will see the menu group created for those groups.



User Groups Screen, Navigation Menu Tab

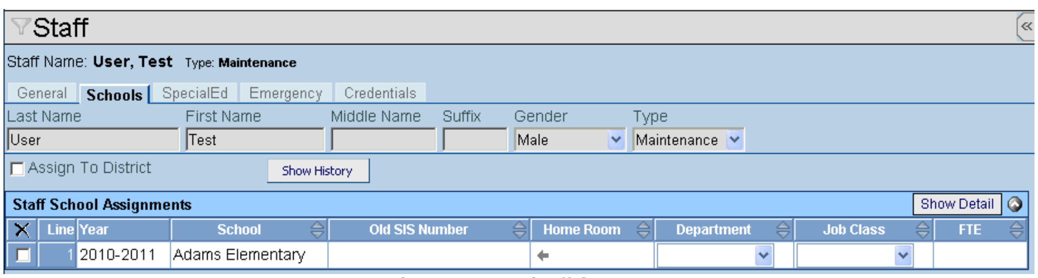
- A valid focus school and year is set on the **Focus** tab of the **User** screen.
- No settings are added to the **Organizations**, **Navigation Menu**, **Security Settings**, **Spell Check**, or **POV** tabs of the **User** screen.

Caution: Users created through LDAP synchronization should not be disabled in Synergy SIS, and their group assignments on the **User Groups** tab of the **User** screen should not be modified in Synergy SIS. These changes are not sent back to the LDAP directory and could cause errors in access rights. Always make these changes in LDAP, and they will be passed on to Synergy SIS.

To create staff school year assignments, the following conditions must be met:

- The staff must have matching badge numbers and staff types in both Synergy SIS and LDAP.
- The staff type must be selected on the **System Configuration** screen.
- The staff must be assigned to a user group that has **Allow LDAP Monitoring** checked.
- The user group must have an organization assigned.

Once these conditions are met, the user is assigned to the first organization listed for the user group for the current school year set on the **District Setup** screen. This assignment is recorded on the **Schools** tab of the **Staff** screen.



Schools Tab, Staff Screen

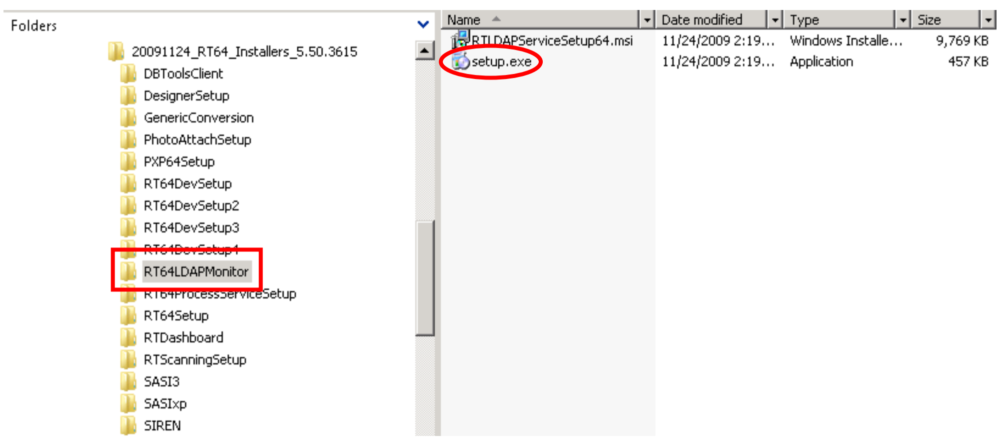
Other rules for staff school assignments are:

- LDAP synchronization assigns users to schools but not to the district or other higher organizational level. This prevents the accidental assignment of staff to district level access.
- School assignments are never removed. If staff are removed from the user group in LDAP, the assignment remains. If the organization listed for the user group is changed, the assignment remains.
- Only the first organization on the **Organizations** tab of the **User Groups** screen is assigned. To assign a staff member to multiple schools, they must be assigned to a user group for each school, and each user group must have only one organization listed.
- Assignments are made only when a user is created or added to a new user group in LDAP. If a user has been created and the organization for one of their user groups is changed, they are not assigned to the new organization. However, if the user is added to a new user group that has an organization assigned, the user is assigned to that organization.

Caution: Because staff school assignments are not updated when the organizations listed for a user group are changed, it is strongly recommended that organizational assignements not be changed once LDAP synchronization starts. Otherwise, staff assignments could be very confusing and inconsistent, as new users would receive the new assignments, but previous users would not.

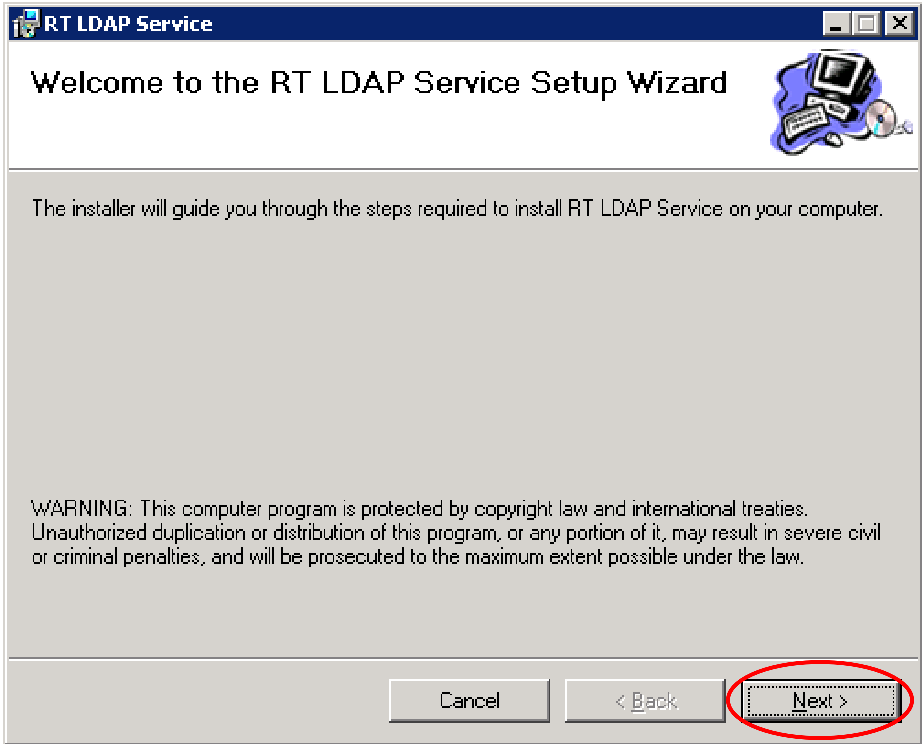
For the second or third integration type to occur, the RT LDAP Monitor service must be installed. Edupoint recommends that this service be installed on a process server, with both 3-2 and 64-bit versions available. To install the RT LDAP Monitor service:

1. Find the folder on the server where the Synergy SIS release file has been extracted, as described in Chapter Two of the *Synergy SIS – System Installation Guide*.
2. In the latest release folder, find the **RTLDAPMonitor (or RT64LDAPMonitor)** folder and double-click the **Setup.exe** file. The **Welcome to the RT LDAP Service Setup Wizard** dialog box opens.



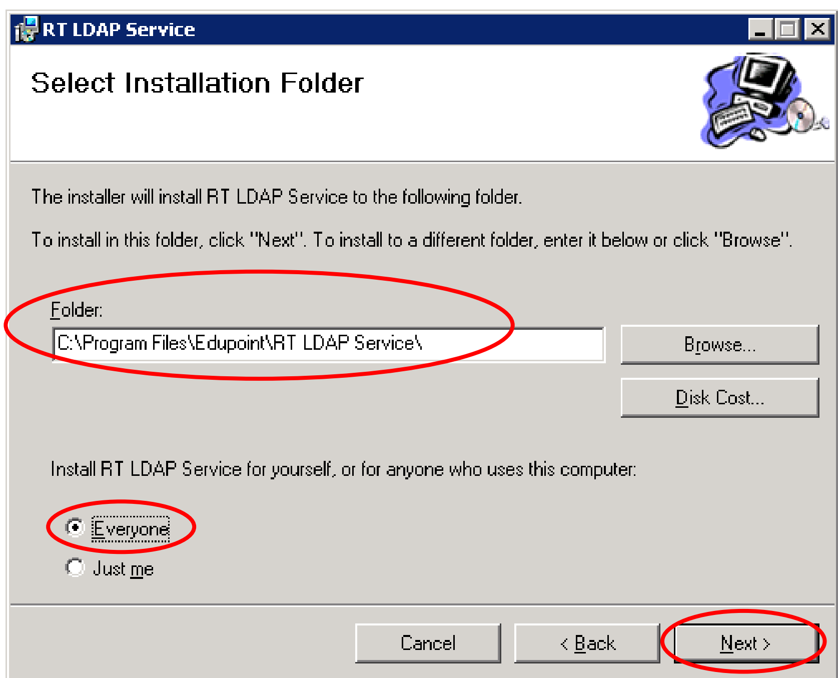
RT64LDAPMonitor Folder

3. Click the **Next** button.



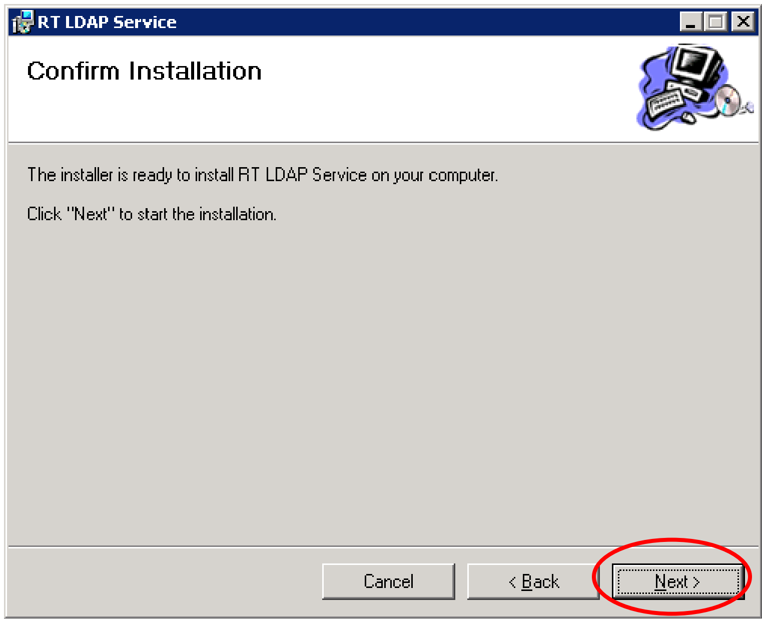
Welcome to the RT LDAP Service Setup Wizard dialog box

4. To change the default installation location (C:\Program Files\Edupoint\RT LDAP Service), either type a location in the **Folder** box or click the **Browse** button to locate and select the new folder.



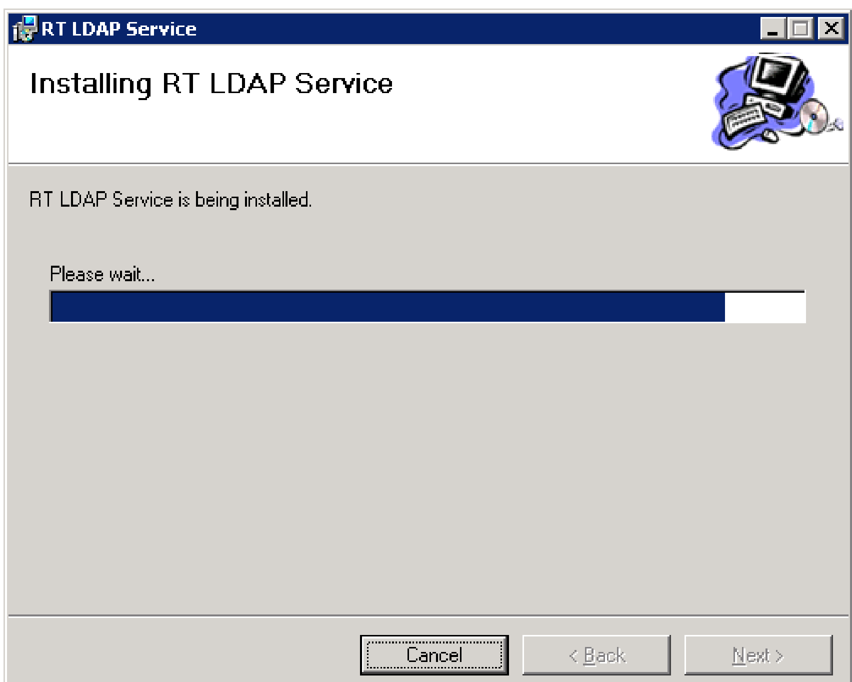
Select Installation Folder dialog box

5. Click the **Everyone** option to make the LDAP service available for all server logins, or click **Just me** to install for the current user only.
6. Click the **Next** button. The software displays the **Confirm Installation** dialog box.
7. Click the **Next** button to start the installation.



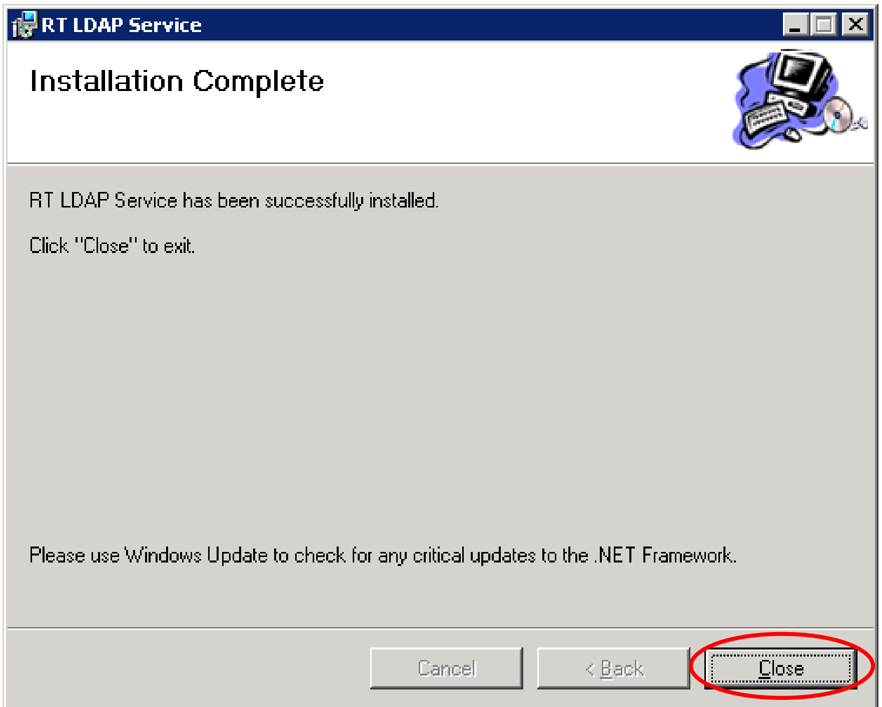
Confirm Installation dialog box

The **Installing RT LDAP Service** dialog box is displayed, with a progress bar.



Installing RT LDAP Service dialog box

The **Installation Complete** dialog box is displayed.

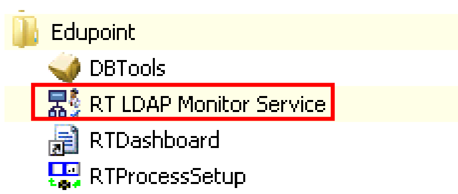


Installation Complete dialog box

8. Click the **Close** button.

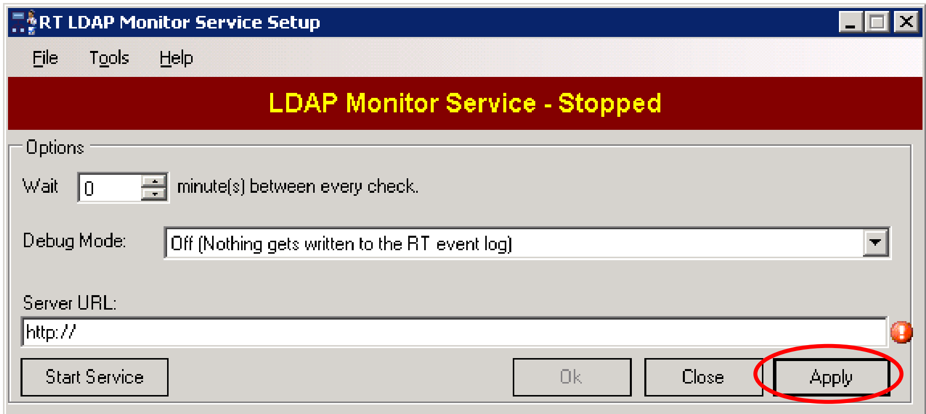
Once the LDAP Monitor Service has been installed, it must be configured and started to begin synchronizing information between LDAP and Synergy SIS.

1. Start the RT LDAP Monitor Service by clicking on the **RT LDAP Monitor Service** program icon in the **Edupoint** folder in the **All Programs** menu on the server. The RT LDAP Monitor Service Setup starts.



RT LDAP Monitor Service icon

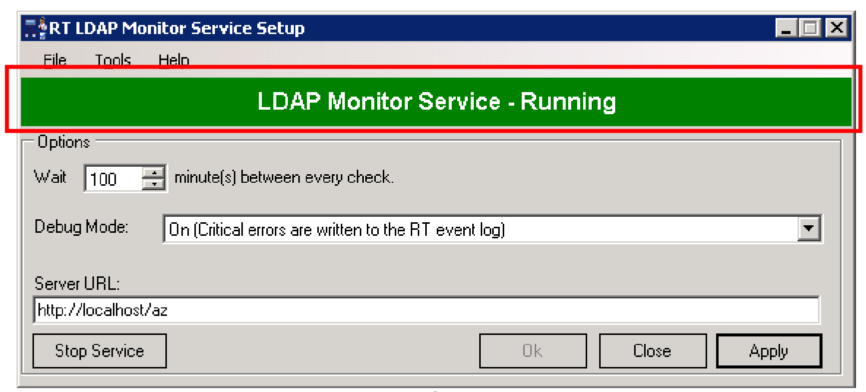
2. Enter the number of minutes between checks of the LDAP service in the **Wait** box. Each check looks for new users or new user group information that should be synchronized with Synergy SIS.



RT LDAP Monitor Service Setup

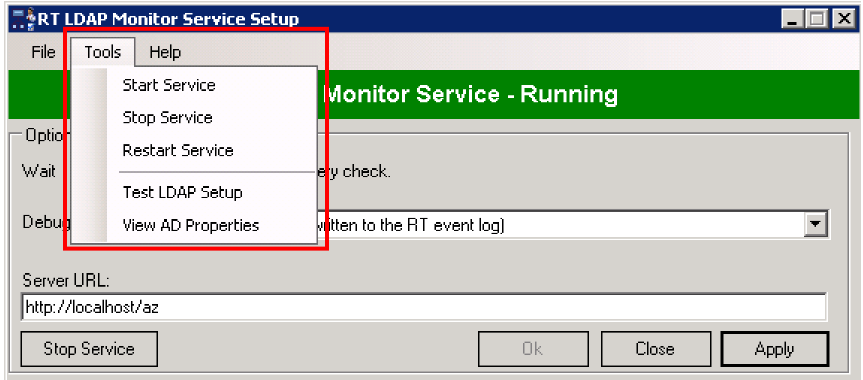
3. In the **Debug Mode** list, select how error messages are recorded for the LDAP Monitor Service. Error messages are recorded in the RTService Log section in the Event Viewer on the server. **Off** does not record any messages. **On** records critical error messages. **Extended** records non-critical error messages and status message.
4. In the **Server URL** box, enter the address of the web server. If multiple web servers are in use in the district, only one web server needs to be selected for LDAP integration.
5. Click the **Apply** button to save the changes. T
6. Click the **Start Service** button to start the service.

Once the service has been started, the top bar turns green and the service status is listed as **Running**. To stop the service, click the **Stop Service** button.



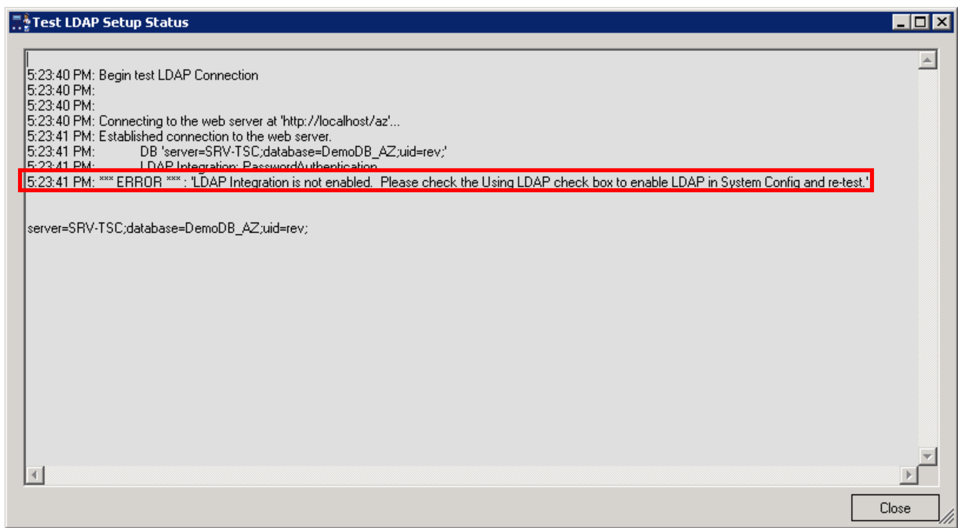
LDAP Monitor Service Running

You can start, stop, or restart the service by clicking the **Tools** menu and then **Start Service**, **Stop Service**, or **Restart Service**.



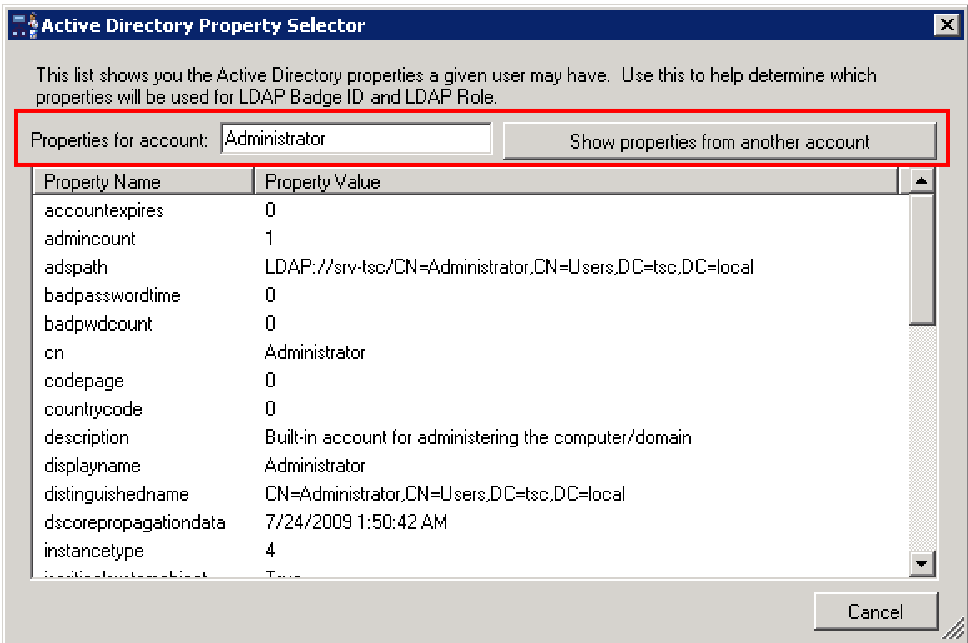
Tools Menu

To check the LDAP configuration in Synergy SIS, click **Test LDAP Setup** on the **Tools** menu. If the service is not configured correctly, the error is listed in the Test LDAP Setup Status window that opens. The window also reports corrective action needed.



Test LDAP Setup Status

To view the properties in LDAP used to synchronize user and/or group information for a specific user, click **View AD Properties** on the **Tools** menu. The **Active Directory Property Selector** dialog box opens, listing properties and their values for the first user account in LDAP. To see the properties for a different user account, enter the account name in the **Properties for account** box, and click the **Show properties from another account** button.

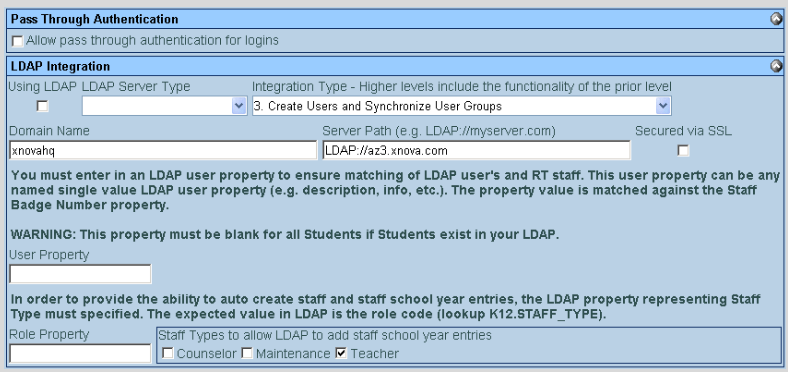


Properties Displayed for User Account

To see the version number of the LDAP Monitor Service, click **About** on the **Help** menu.

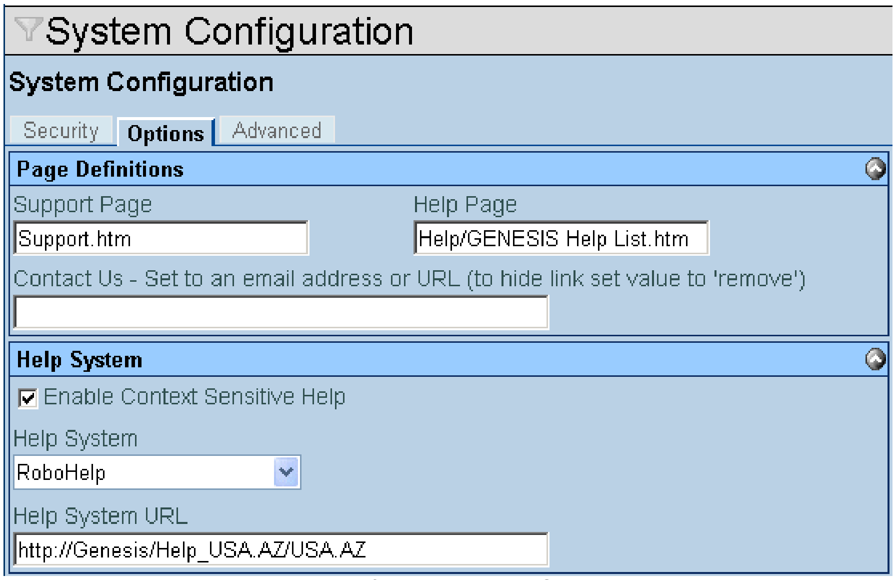
Tip: Synergy SIS also supports secure LDAP for instances where the Synergy SIS web server(s) need to traverse an open Internet connection to access the LDAP directory (such as in a shared hosting environment). To set up a secure LDAP connection:

- ► Open port 636 (secure LDAP port) on the firewall protecting the LDAP server, and point traffic on this port to the LDAP server.
- ► Install the certificate protecting the LDAP server environment on the Synergy SIS web server(s) and the server where the LDAP monitoring service is installed.
- ► Enter *LDAP://server.domainName* as the Server Path as usual. Although generally LDAPS:// is used with secure LDAP connections, Synergy SIS automatically senses the type of connection and adjusts for secure or non-secure paths. Do not enter LDAPS.
- ► Check the **Secured via SSL** box.



PAGE DEFINITIONS AND HELP SYSTEM

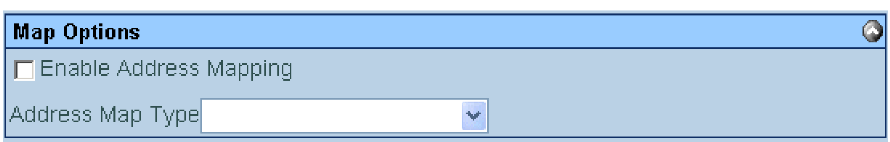
On the **Options** tab of the **System Configuration** screen, you can customize the support and online help pages. See Chapter Five.



Page Definitions and Help System

ADDRESS MAPPING OPTIONS

You can link the address information in Synergy SIS with mapping software such as Google Maps. See the *Synergy SIS – Student Information Administrator Guide.*



Map Options

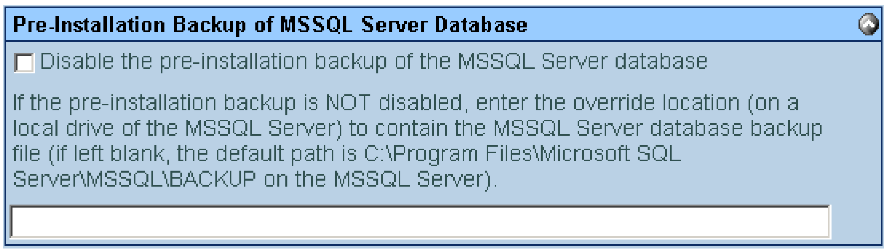
SYSTEM CACHE

To improve Synergy SIS performance, the primary keys for each database are cached in memory as each table is used. This cache may need to be refreshed periodically. To clear the cache, click the **Clear Cache** button.

System Cache

PRE-INSTALLATION BACKUP

By default, when you install a new release of Synergy SIS over an existing installation, the Microsoft SQL Server database is automatically backed up before any changes are made to the database. To disable this automatic backup, check the **Disable the Pre-Installation Backup of the MSSQL Server database** box. To change the location where the backups are stored, enter the new path in the box provided. By default, the backups are saved to C:\Program Files\Microsoft SQL Server\MSSQL\Backup. For information about upgrading Synergy SIS, see the *Synergy SIS – System Installation Guide*.



Pre-Installation Backup of MSSQL Server Database

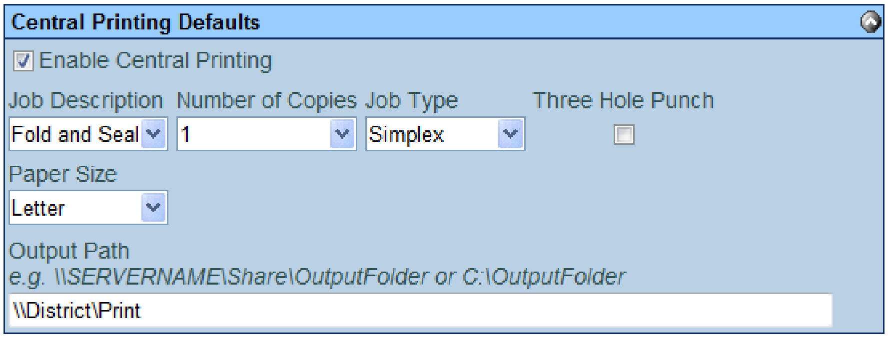
SCHOOLS INTEROPERABILITY FRAMEWORK (SIF)

Schools Interoperability Framework is a standard established for data exchanges between software systems for schools. Synergy SIS supports the SIF standard and can import data in SIF format. For information about setting up SIF, see Chapter Nine.

Schools Interoperability Framework (SIF)

Central Printing Defaults

You can configure Synergy SIS to send reports to a folder for centralized printing. For example, the printer for fold-and-seal report cards might be in the central location. To turn this feature on, check the **Enable Central Printing** box and set up the following options:



Central Printing Defaults

- **Job Description** – select **Letter**, **Label**, **Mailer**, or **Fold and Seal** as the type of print job.
- **Number of Copies** – select 1, 2 or 3.
- **Job Type** – select **Simplex** for one-sided or **Duplex** for two-sided printing.
- **Three Hole Punch** – check this box for the report to be three-hole punched.
- **Paper Size** – select **Letter** or **Legal**
- **Output Path** - enter the folder where the job should be saved, as a UNC path (such as \\SERVERNAME\Share\OutputFolder) or local path (such as C:\OutputFolder).

Application Login

The **Application Login** option is covered in Chapter Five.

Application Login

Display Options

In the **Display Options** section, you can choose whether to allow HTML tags in announcements and other text. You can also choose whether values that are no longer active are displayed to users in lists and as check boxes.

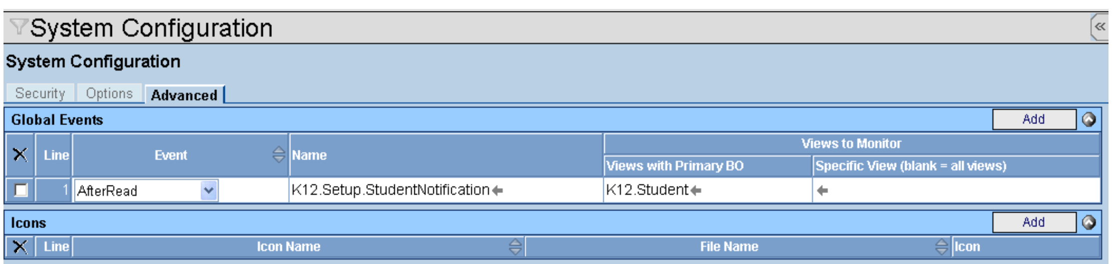
LIST OPTIONS

The **Drop-Down Item Search Option** determines the behavior of lists when a user uses the keyboard to locate a value.

- **Match items by single letter** – the system matches by the first letter entered. If in a **State** list a user presses M and then I, the values **Maine** and then **Idaho** are selected.
- **Match items by sequence of letters** – the system matches to a sequence of letters. If in a **State** list a user presses M and then I, the values **Maine** (the first M state) and then **Michigan** (the first MI state) are selected.
- **Hybrid match strategy** – once the sequence typed has no match, the system matches by the last character typed. If in a **State** list a user presses M, then I, and then D, the values **Maine** (the first M state), then **Michigan** (the first MI state), and then **Delaware** (the first D state) are selected.

ADVANCED

The **Advanced** tab of the **System Configuration** screen can customize the workflow in Synergy SIS so that saving or modifying data in a screen calls up another screen. See Chapter Seven.



System Configuration Screen, Advanced Tab

The **Icons** section is used to add custom icons for student notifications. See the *Synergy SIS – Student Information Administrator Guide*.

Chapter Three: DISTRICT AND SCHOOL SETUP

This chapter covers:

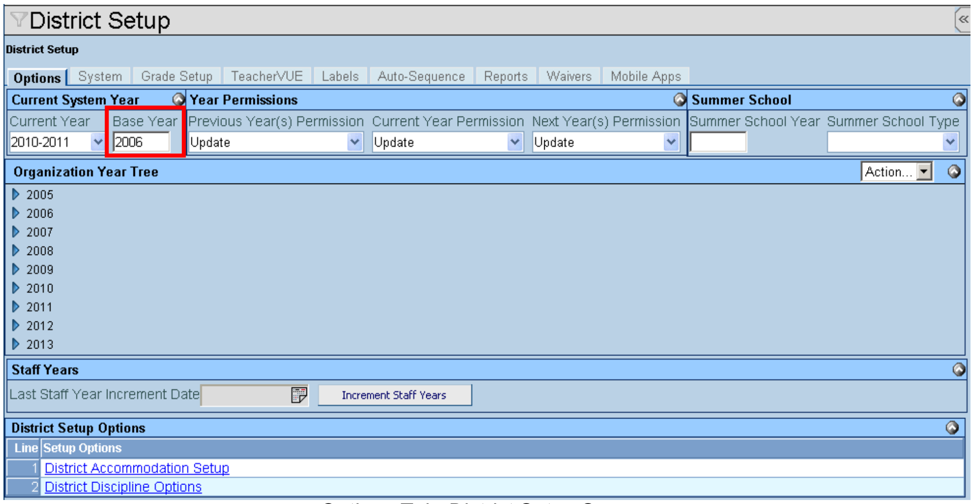
- ► District Setup
- ► Organization
- ► School Setup
- ► Copy School Setup
- ► Non-District Schools

DISTRICT SETUP

To set up the years available at each school:

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

   The years displayed in the **Organization Year Tree** are controlled by the year entered in the **Base Year** field.

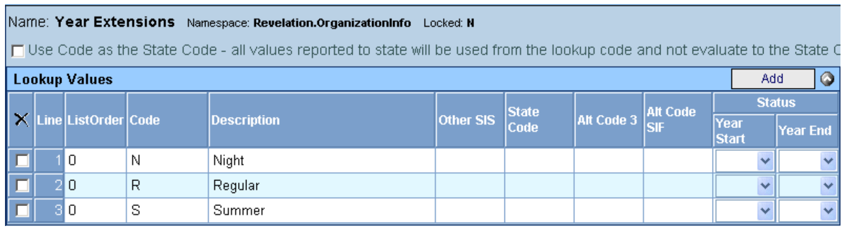


Options Tab, District Setup Screen

2. Enter the four-digit **Base Year** as the earliest school year for which there will be data in Synergy SIS.
3. Select the **Current Year**. Synergy SIS displays a year in the tree from the **Base Year** to the **Current Year**.
4. Click the **Save** button at the top of the screen. The **Organization Year Tree** automatically adjusts the years displayed.

Tip: If the current year is not displayed, select the year closest to the current year and save the changes. The years displayed will expand. Continue selecting the year closest to the current year and saving, until the current year is displayed in the list.

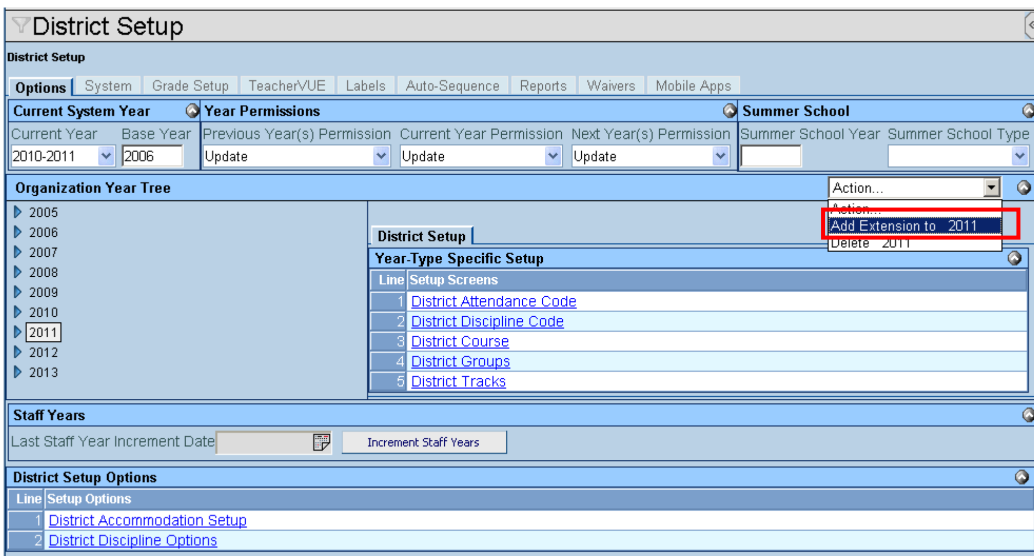
After the years are set up, you must add an extension to each year for which data will be entered. An extension is the type of school year, such as summer, night or regular. Each extension has its own school and district calendar and setup options. By default, Synergy SIS lists three types of extensions (Night, Regular, and Summer), but you can customize these for the district by modifying the **Year Extensions** lookup table under the namespace **Revelation.OrganizationInfo**. For information about modifying lookup tables, see Chapter Nine.



Year Extensions Lookup Table

To add an extension to a year in the tree:

1. Click the year in the tree
2. In the **Action…** list, click **Add Extension**.

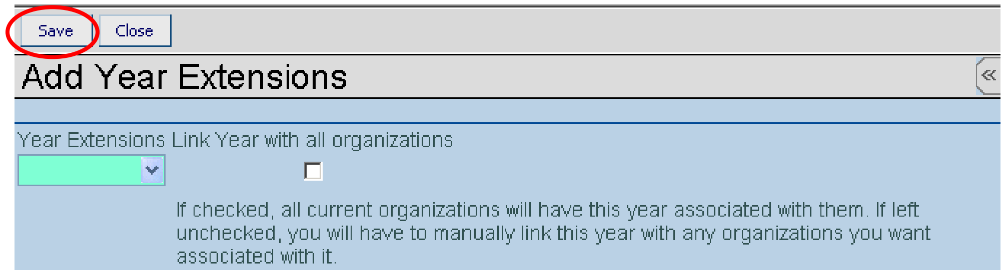


3

Adding an Extension

3. In the **Add Year Extensions** window, select the extension.
4. To add this extension to every existing school, check the **Link Year will all organizations** box. If this box is not checked, the extension has to be added manually to each school as described under Organization on page 75. Any school added to Synergy SIS after the extension is created will have the year in focus with the regular extension added to it, and all other years and extensions will need to be manually linked to the school.

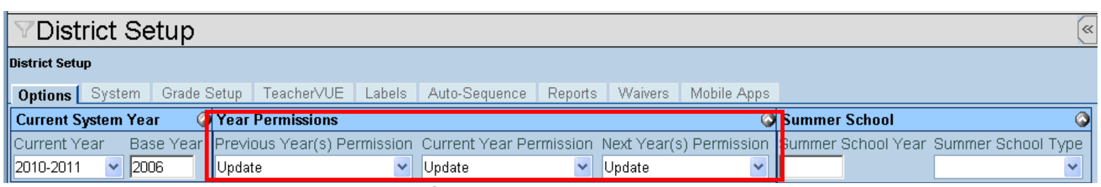
5. Click the **Save** button at the top of the screen.



Add Year Extensions Screen

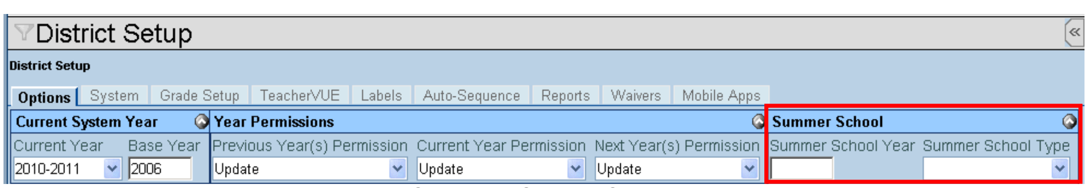
Tip: During the initial setup of Synergy SIS, add only the current year's regular extension at first, and set that year as the focus. Then create the organizations and schools as described in the next section of this chapter. After the schools have been created, return to **District Setup** and create the rest of the extensions so they are automatically linked to all schools.

Once the years have been set up, you can set up the default permissions for the previous, current, and following years, using the lists in the **Year Permissions** section. These permissions can be overridden by the security assigned to user groups and users, as described in Chapter Four. For more about security in Synergy SIS, see the *Synergy SIS – Security Administrator Guide*. It is recommended to leave all permissions as **Update** initially, or even the administrator can be locked out of making changes.



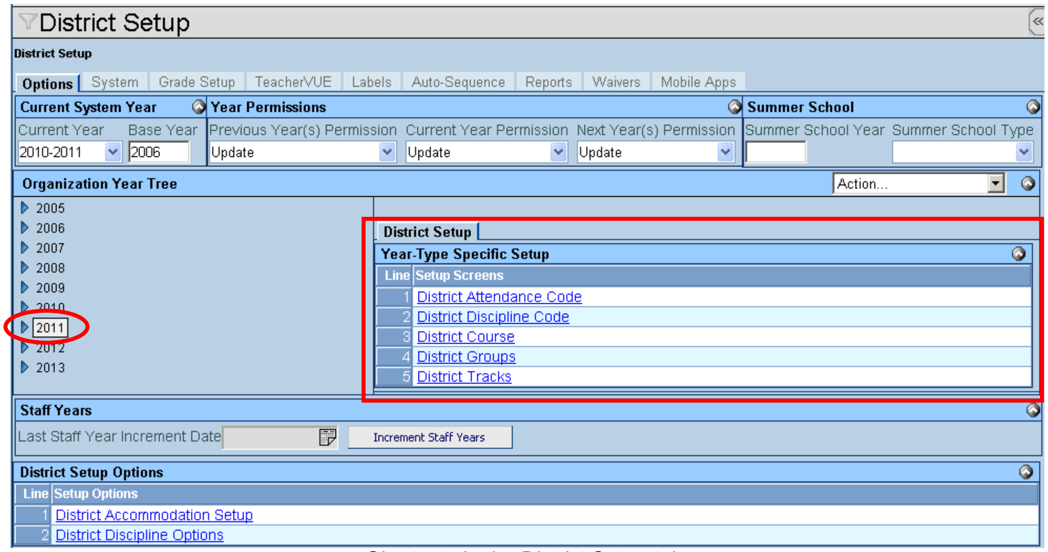
Setting Year Permissions

The current summer school is indicated by entering the four-digit year for the **Summer School Year**. The extension that indicates summer school must also be selected in the **Summer School Type** list. For more information about setting up summer schools, see Chapter Four of the *Synergy SIS – Attendance Administrator Guide*.



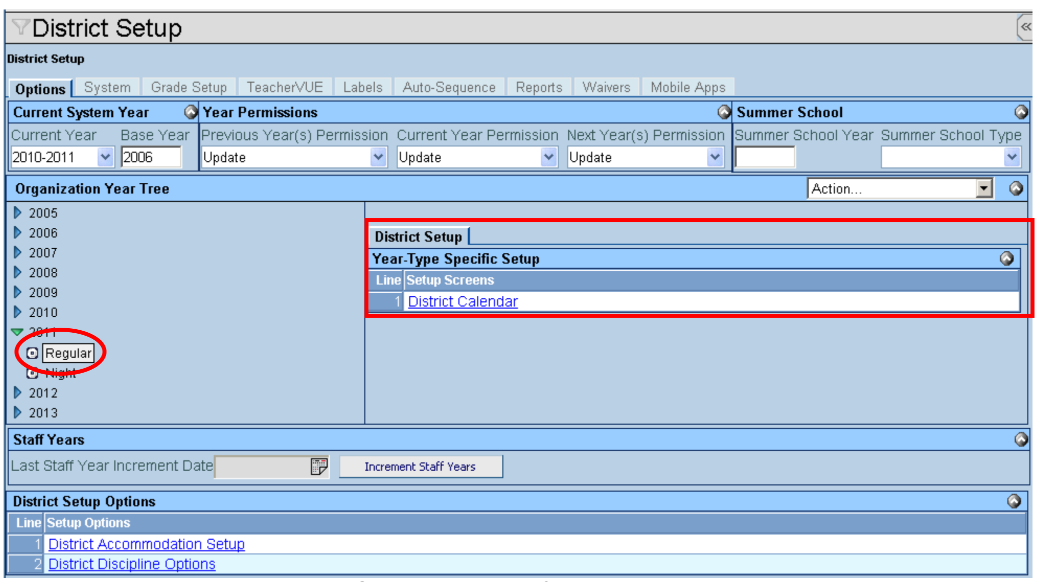
Setting the Summer School

Links to some of the core setup screens for the district are available by clicking each year in the **Organization Year Tree**. The links appear on the **District Setup** tab. The screens can also be accessed through the navigation tree.



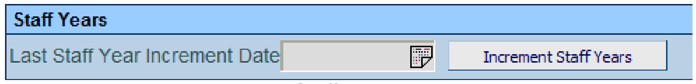
Shortcuts in the District Setup tab

As with the year, when the extension is selected, the **District Setup** tab shows links to district-related screens. These screens can also be accessed via the Navigation Tree.



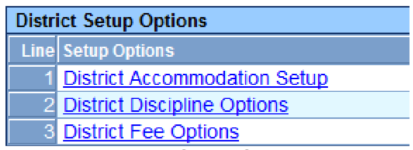
Shortcuts available for extensions

The **Staff Years** section shows when the staff members' counts of years in the education industry and in the district were last increased. These counts are tracked on the **Staff** screen. For more information about staff setup, see Chapter Four.



Staff Years

Under **District Setup Options**, the **District Accommodation Setup** link sets the testing accommodations available for each classroom accommodation. For more information about accommodations, see the *Synergy SE – System Administrator Guide*.

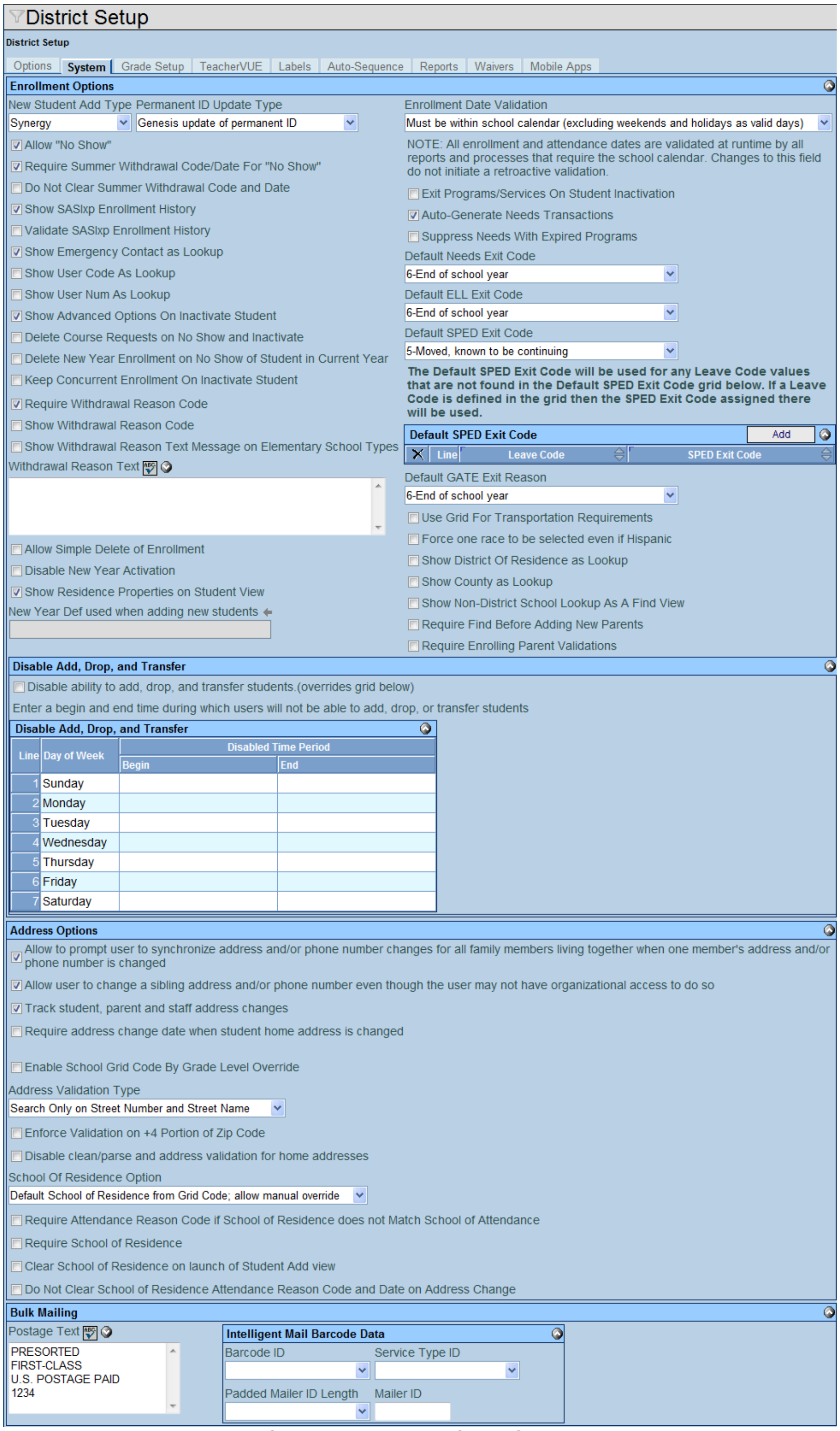


District Setup Options

The **District Discipline Options** link sets the default numbering system using for discipline incidents. For more information about discipline setup, see the *Synergy SIS – Discipline & Conference Administrator Guide*.

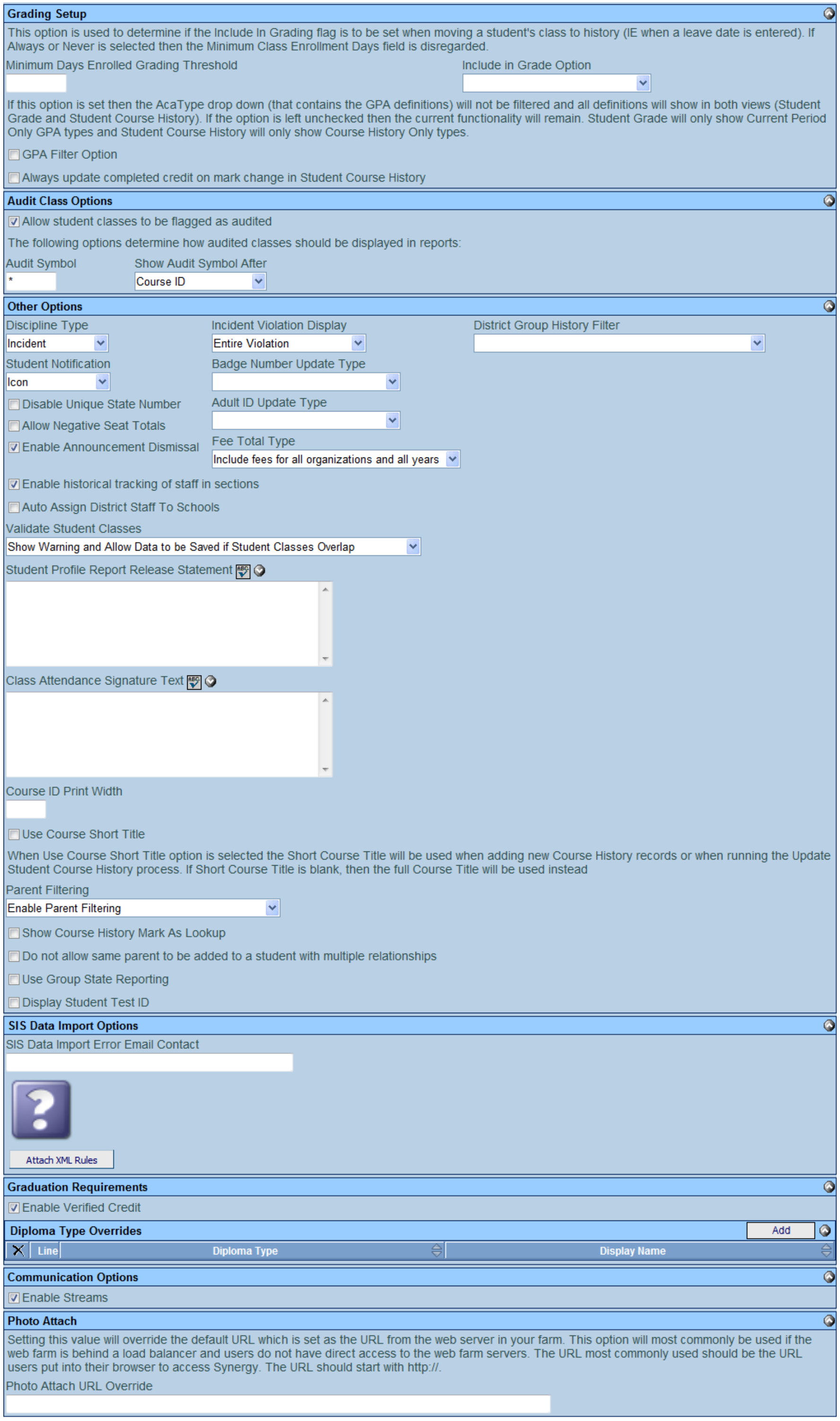
The **District Fee Options** link sets the options for how fees are paid, prorated, and waived. For information about fees setup, see the *Synergy SIS – Fees Administrator and User Guide*.

The **System** tab of the **District Setup** screen controls options used throughout Synergy SIS:



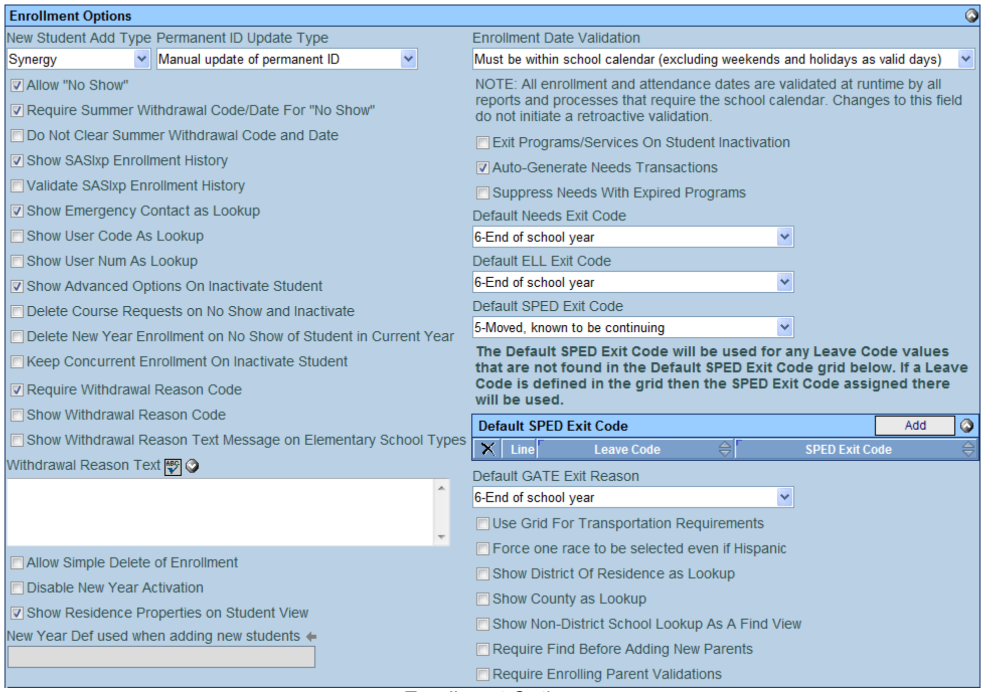
System Tab, District Setup Screen

(continued on next page)



System Tab, District Setup Screen
(continued from previous page)

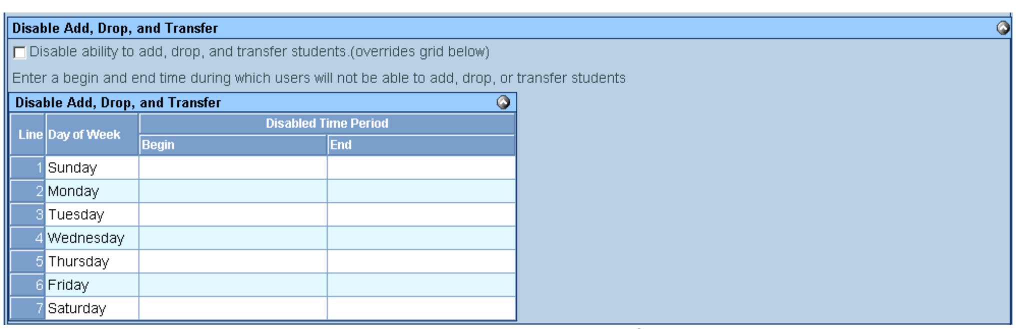
- **Enrollment Options** – most of these options control how students are added and transferred within Synergy SIS. The impacts of these options are described in the *Synergy SIS – Student Information Administrator Guide*. Options that set the default transactions, such as **Default Needs Exit Code**, are explained in the state data reporting guides.



Enrollment Options

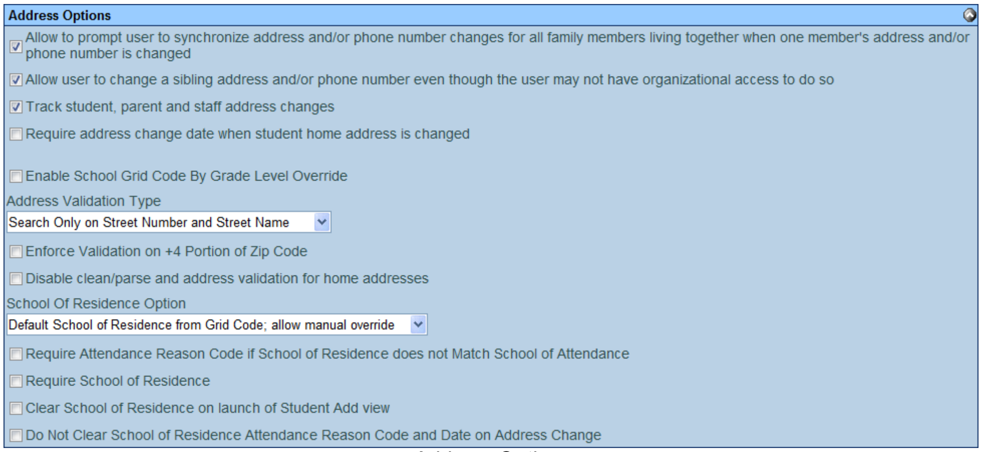
More information about transitioning schools to a new school year is in the *Synergy SIS – New Year Rollover Guide*. That guide describes the **Delete Course Requests on No Show and Inactivate**, **Delete New Year Enrollment on No Show of Student in Current Year**, **Disable New Year Activation**, and **New Year Def used when adding new students** options.

- **Disable Add, Drop, and Transfer** – these options control when student enrollments can be modified. The impacts of these options are described in the *Synergy SIS – Student Information Administrator Guide*.



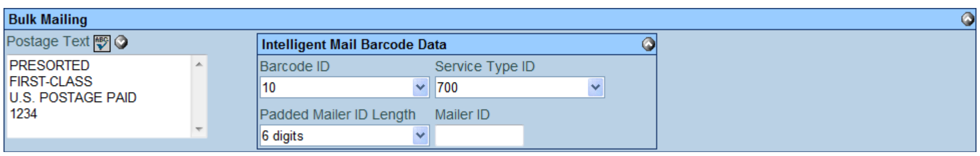
Disable Add, Drop and Transfer

- **Address Options** – these options control how student and parent addresses are treated. The impacts of these options are described in the *Synergy SIS – Student Information Administrator Guide*.



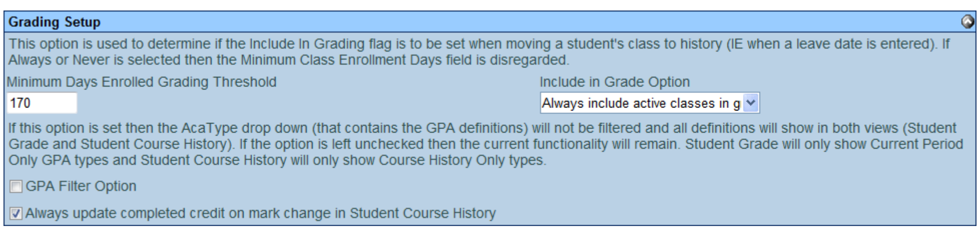
Address Options

- **Bulk Mailing** – the text entered here appears as the default postage label on several reports, primarily report card formats.



Bulk Mailing

- **Grading Setup** – these settings control when classes are available to be graded. For more information on how grading is configured in Synergy SIS, see the *Synergy SIS – Grading Administrator Guide*.

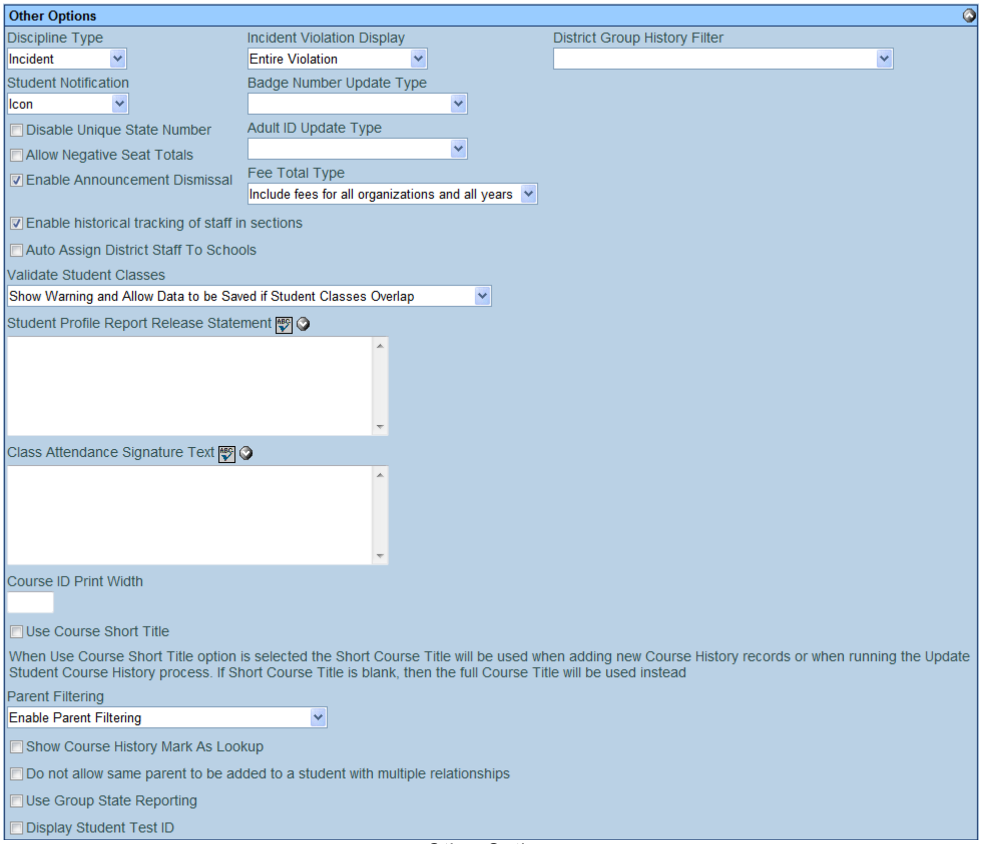


Grading Setup

- **Audit Class Options** – The **Allow Student Classes To Be Flagged As Audited** check box is covered in the *Synergy SIS – Scheduling Guide*. This adds an **Audit Class** column to the **Classes** tab of the **Student** screen.

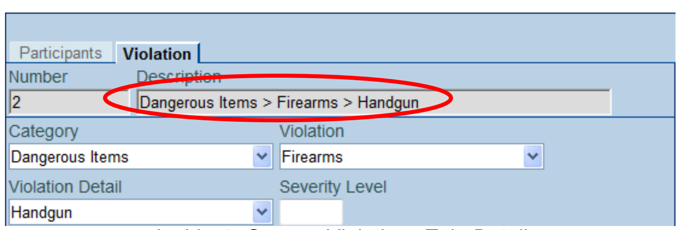
Audit Class Options

- **Other Options** – these settings impact various areas in Synergy SIS.

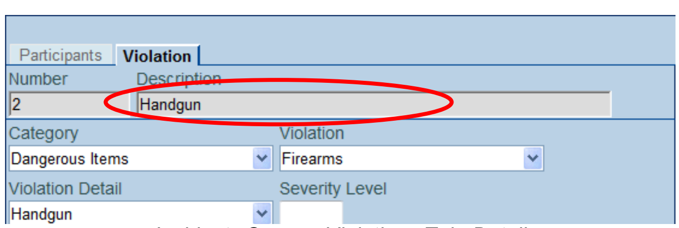


Other Options

  - The **Discipline Type** and **Incident Violation Display** lists control the default display of discipline incidents. More information about the setup of the discipline module is in the *Synergy SIS – Discipline & Conference Administrator Guide*.
  - **Incident Violation Display** controls whether, where violations are displayed, their hierarchies are shown. Select **Entire Violation** to show the hierarchy or **Lowest Level Violation Only** to show just the detailed violation.



Incidents Screen, Violations Tab, Detail



Incidents Screen, Violations Tab, Detail

- **District Group History Filter** controls the group participation history shown for students in the **Student Groups** screen. For information about district group configuration, see the *Synergy SIS – Student Groups Administrator Guide*.
- **Student Notification** – Notifications are displayed at the top of every student-focused screen to indicate special conditions such as a custody issue of which staff should be aware. This list controls the type of notification displayed. For more information about setting up notifications, see the *Synergy SIS – Student Information Administrator Guide*.
- **Badge Number Update Type** – This option determines how badge numbers are created for staff. Information about badge number setup is in Chapter Four.
- **Disable Unique State Number** – By default, the state number assigned to each student must be unique. However, if duplicates exist in the previous student information system, it may be necessary to turn off enforcement of this rule during the conversion to Synergy SIS. More information about setting up the student record options is in the *Synergy SIS – Student Information Administrator Guide*.
- **Allow Negative Seat Totals** – This option controls whether students can enroll in a section that is already full. For information about sections, see the *Synergy SIS – Scheduling Guide*.
- **Enable Announcement Dismissal** – This option allows announcements posted on the home page of Synergy SIS to be dismissed by staff and no longer displayed. For information about announcements, see Chapter Five.
- **Adult ID Update Type** – This list controls how Adult IDs are assigned to parents. They can be automatically generated or manually assigned. For information about parent records, see the *Synergy SIS – Student Information Administrator Guide.*
- **Fee Total Type** – This option sets up how student fees are totaled. For information about setting up student fees, see the *Synergy SIS – Fees Administrator and User Guide.*
- **Enable historical tracking of staff in sections** – Because only one primary teacher can be assigned to a section, enabling this option allows Synergy SIS to track the changes to the primary teacher assignment for reporting purposes. For information about teacher assignments and reporting, see the *Synergy SIS – Scheduling Guide* and the *Synergy SIS – Grading Administrator Guide.*
- **Auto Assign District Staff To Schools** – controls whether, when a staff member is assigned to the district, Synergy SIS assigns that individual to each school in the district as well.
- **Validate Student Classes** – As classes are assigned to students, Synergy SIS can verify that the class schedules do not overlap. This option controls how class schedules are verified. For information about creating class schedules, see the *Synergy SIS – Scheduling Guide.*

    - **Student Profile Report Release Statement** – The text entered here is displayed on the Student Profile Report. For customization and setup options for this report, see the *Synergy SIS – Student Information User Guide*.
    - **Class Attendance Signature Text** – The text entered here is displayed on the Class Roster report. For customization and setup options for this report, see the *Synergy SIS – Attendance User Guide*.
    - **Course ID Print Width** – Enter the maximum number of characters to be used when printing Courses ID in reports.
    - **Use Course Short Title** – If the short title is enabled, the short title entered in the **District Course** screen is used when adding or updating student course history. For information about configuring student course history, see the *Synergy SIS – Course History Administrator Guide.*
    - **Parent Filtering** – When parent filtering is enabled, only parents of students in the school in focus can be added to other students in the school. Otherwise, any parent in the district can be added. It is strongly recommended that filtering be disabled. For enrollment options, see the *Synergy SIS – Student Information User Guide*.
    - **Show Course History Mark As Lookup** controls whether the **Mark** column in the **Courses** grid on the **Course History** tab of **Synergy SIS > Course History > Student Course History** is a free-entry text field or a lookup list.
    - **Do not allow same parent to be added to a student with multiple relationships** controls whether a parent can be listed with another relationship as well on the Parent/Guardian tab of **Synergy SIS > Student > Student**.
    - **Display Student Test ID** controls whether a **Student Test ID** column appears on the **Student Test** tab of **Synergy SIS > Test History > Student Test**.

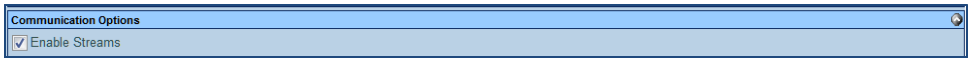
- **SIS Data Import Options** – these options control the import of data from other student information systems. For more information about these settings, refer to the *Synergy SIS – Data Conversion Guide*.

SIS Data Import Options

- **Graduation Requirements** – this option turns on verified credit for student course history and graduation requirements. For additional information on setting up a verified credit process, see the *Synergy SIS – Course History Administrator Guide*.

Graduation Requirements

- **Communication Options -** this option enables the Streams Collaboration Tool, an easy-to-use and intuitive social media-type interface. Users can create private 'Streams' to communicate with other staff, in addition to being able to create groups where content can be shared with several users at one time. Communication occurs via posts – users can post documents, web links, and text to a Stream, as well as respond to others' posts. To encourage and facilitate home/school collaboration, parents and students can communicate with teachers via the Streams tab in ParentVUE and StudentVUE, if allowed by the district. Users and user groups can be secured from this screen, if desired, using PAD Security. Teachers, who typically do not have access to Synergy SIS outside of TeacherVUE, access Streams via the Streams menu in Grade Book.



Communication Options

- **Photo Attach -** this option provides the ability to use the **Photo Attach URL Override** to set a URL that the photo attach application uses, instead of defaulting to the web server. The format should be the entire URL, such as https://district.synergy.com.

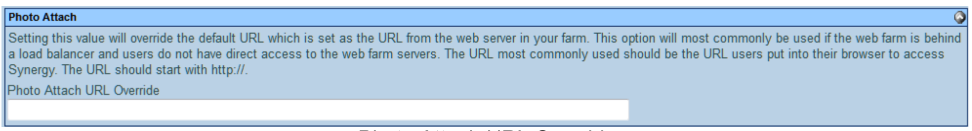
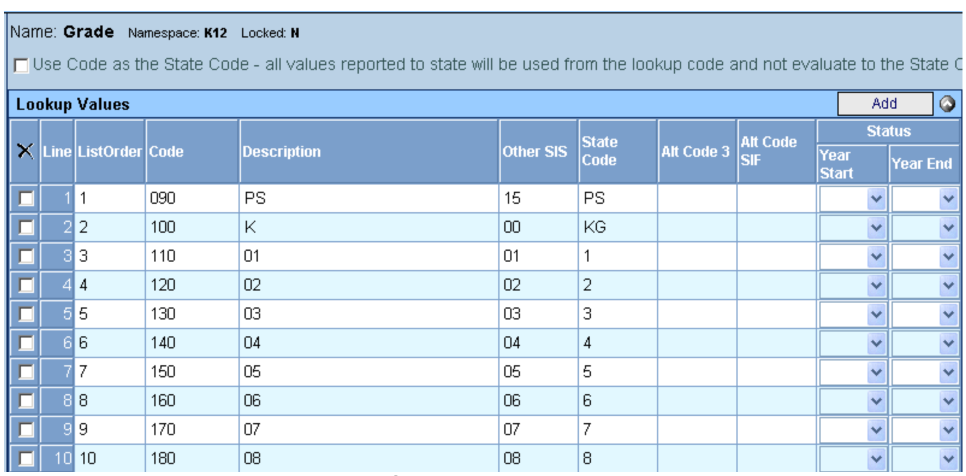


Photo Attach URL Override

The **Grade Setup** tab of the **District Setup** screen lists the grade levels available at the district. By default, Synergy SIS lists all grade levels from pre-schools through grade 12+. If all of these grades are not available in the district, this list can be modified by changing the lookup table **Grade** found under the namespace **K12**. For more information about modifying lookup tables, see Chapter Eight.


Name: **Grade** Namespace: **K12** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status: Year Start	Status: Year End
	1	1	090	PS	15	PS				
	2	2	100	K	00	KG				
	3	3	110	01	01	1				
	4	4	120	02	02	2				
	5	5	130	03	03	3				
	6	6	140	04	04	4				
	7	7	150	05	05	5				
	8	8	160	06	06	6				
	9	9	170	07	07	7				
	10	10	180	08	08	8				

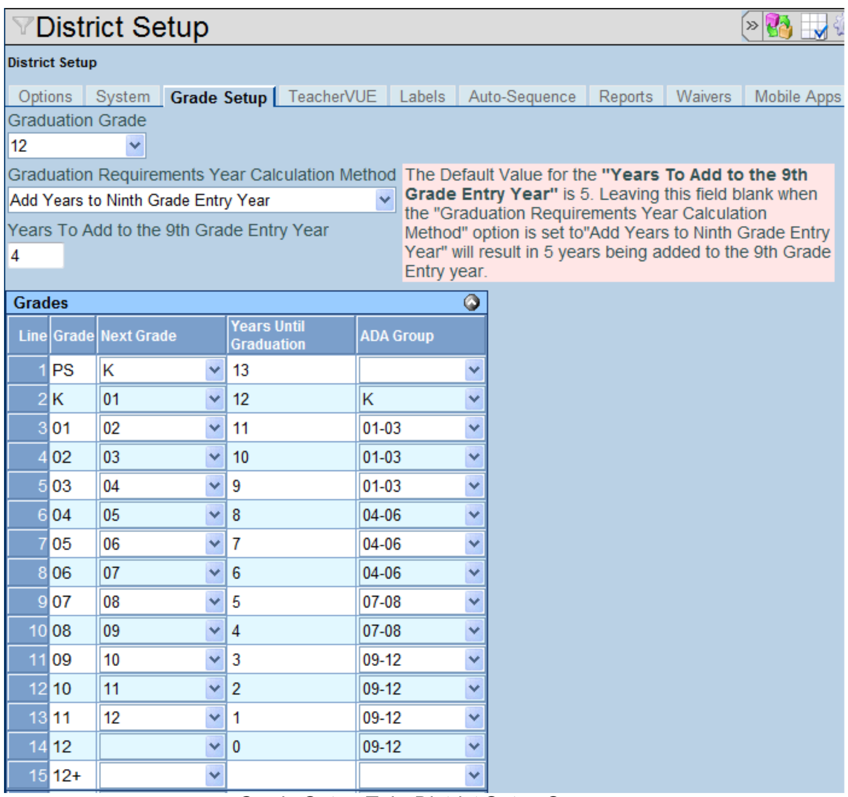
Grade Lookup Table

Caution: It is strongly recommended that the leading zeroes for the Grade Numbers be retained in the Grade lookup table. Changing this can lead to unexpected results when synchronizing the Grade Book or running reports.

Once the list of grades is correct for the district, the grade levels need to be further defined on the **Grade Setup** tab.

1. In the **Graduation Grade** list, select the grade in which graduation occurs.
2. Select a **Graduation Requirements Year Calculation Method**.
   - If you select **Use Expected Graduation Year**, the year of expected graduation is calculated based on the current grade and the **Years Until Graduation**. **Use Expected Graduation Year** is the default if you leave the field blank.
   - If you select **Add Years to Ninth Grade Entry Year**, the **Years To Add to the 9th Grade Entry Year** box appears, and you can specify the number of years to add to the ninth grade entry year to arrive at the graduation requirements year. The default value for **Years To Add to the 9th Grade Entry Year** is 5. Leaving this field blank adds five years to the **Ninth Grade Entry Year**.)

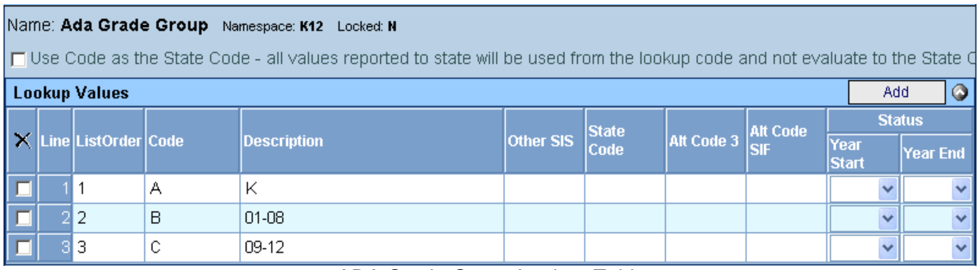
   The **Student** screen, **Other Info** tab, **Graduation Information** section shows the student's **Ninth Grade Entry Year** and **Calculated Graduation Requirements Year**.
3. In the **Grades** section, select the grade level that follows each grade from the **Next Grade** list.



Grade Setup Tab, District Setup Screen

4. Enter the number of years that a student is required to complete to graduate from grade 12 in the **Years Until Graduation** column. This does not include the current year; in a typical setup, grade 6 has 6, not 7, years until graduation.

5. Select the group assigned to the grade level from the **ADA Group** list. By default, the groups are defined as K, 1-8, and 9-12. These groupings can be modified by changing the lookup table **Ada Grade Group** under the namespace **K12**. For more information about modifying lookup tables, see Chapter Eight.



Name: Ada Grade Group Namespace: K12 Locked: N

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C

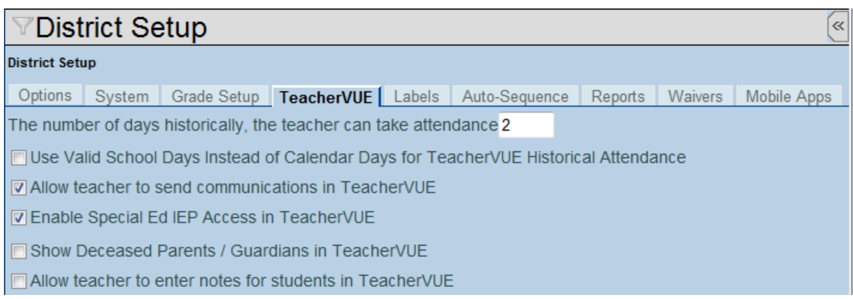
Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
	1	1	A	K						
	2	2	B	01-08						
	3	3	C	09-12						

ADA Grade Group Lookup Table

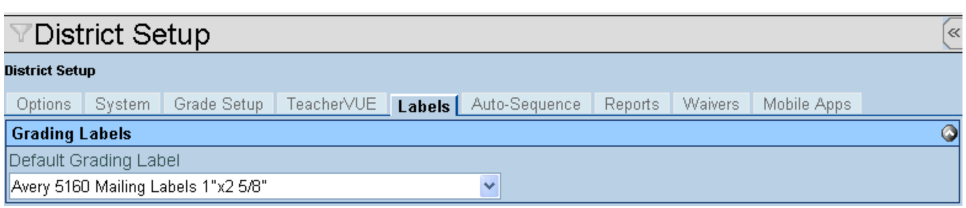
6. Click the **Save** button at the top of the screen.

The **TeacherVUE** tab of the **District Setup** screen sets the number of days previous to today for which a teacher can take attendance in TeacherVUE, and turns functions on and off in TeacherVUE. For more information about the TeacherVUE software, refer to the *Synergy SIS – TeacherVUE Administrator Guide*.



TeacherVUE Tab, District Setup Screen

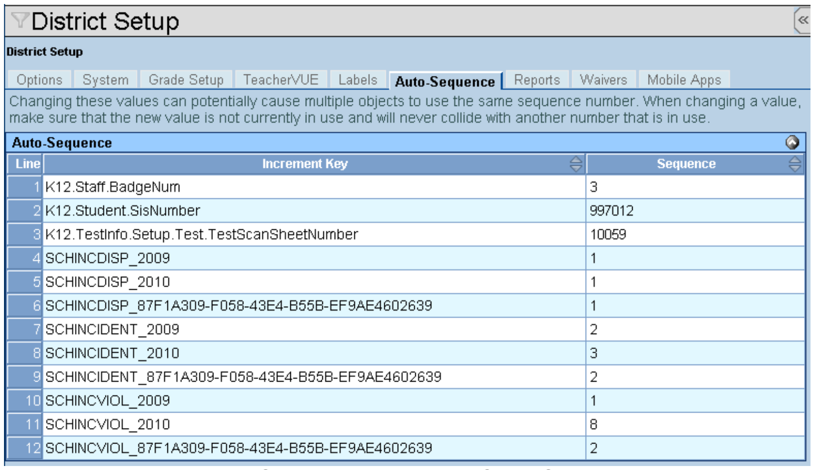
The **Labels** tab of the **District Setup** screen sets the default label definition to be used when printing report cards. The label definitions need to be defined first, as outlined in the section on Label Detail in Chapter Nine. The default grading label can also be set at the school level. For more information about setting up grading options, see the *Synergy SIS – Grading Administrator Guide*.



Labels Tab, District Setup Screen

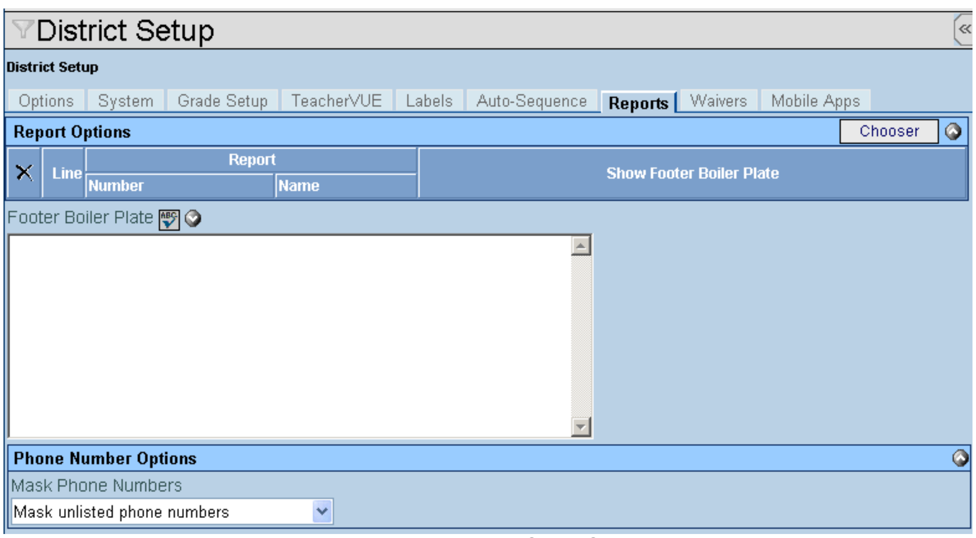
The **Auto-Sequence** tab of the **District Setup** screen enables administrators to adjust the next number in a field that is automatically assigned a number by Synergy SIS. Examples of auto-numbered fields include the badge number assigned to staff and the SIS number assigned to students.

Extreme caution should be used when modifying these values, as an incorrect value could cause a duplicate value to be assigned to a record or prevent users from adding records. These values rarely need adjustment, such as after the initial conversion.



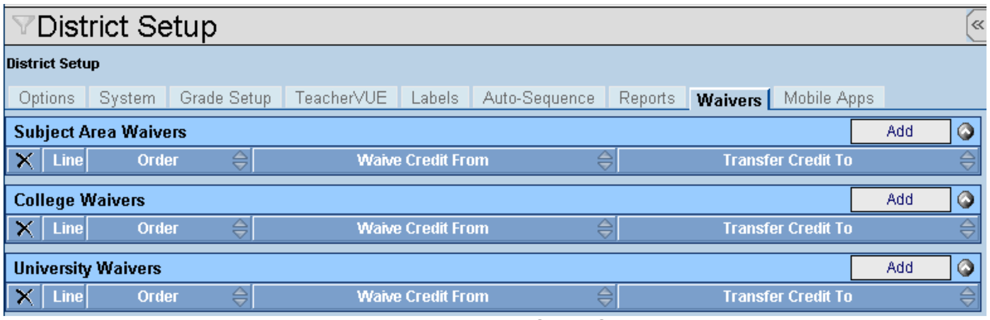
Auto-Sequence Tab, District Setup Screen

The **Reports** tab of the **District Setup** screen can set a default footer for the selected reports. For more information about reports, see the *Synergy SIS – Query & Reporting Guide*.



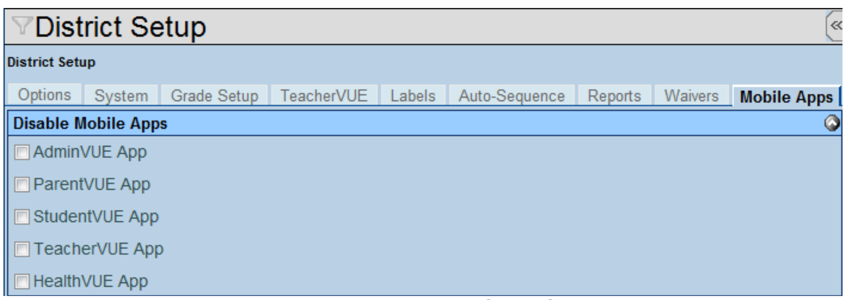
Reports Tab, District Setup Screen

The **Waivers** tab of the **District Setup** screen gives districts the ability to reapply credits earned towards one subject area to another without modifying each individual course record. For more information about waivers, see the *Synergy SIS – Course History Administrator Guide*.



Waivers Tab, District Setup Screen

Synergy SIS offers access to key areas via mobile applications on the iPhone and iPad and on Android devices. The **Mobile Apps** tab of the **District Setup** screen enables administrators to disable these mobile apps by checking the appropriate boxes.



Mobile Apps Tab, District Setup Screen

ORGANIZATION

The **Organization** screen defines the district's organizational structure. Synergy SIS can be set up to mirror any district organization. For example, schools can be grouped by elementary and secondary organizations, as shown below:

- **Sample School District**
  - **Elementary Schools**
    - **Huff Elementary**
    - **Kennedy Elementary**
    - **Lindbergh Elementary**
    - **Martin Elementary**
  - **Middle Schools**
    - **Bradshaw Middle School**
    - **Diaz Middle School**
  - **High Schools**
    - **Fischer High School**
    - **Hoffman High School**

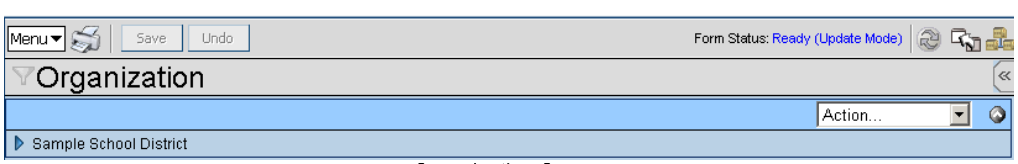
Another possible organization structure is geographical, to show which elementary schools transition their students to a specific middle or high school. In the example below, each group of schools is referred to as a family of schools with the high school as the "parent" school.

- **Sample School District**
  - **Fischer Family**
    - **Bradshaw Middle School**
    - **Fischer High School**
    - **Huff Elementary**
    - **Kennedy Elementary**
  - **Hoffman Family**
    - **Diaz Middle School**
    - **Hoffman High School**
    - **Lindbergh Elementary**
    - **Martin Elementary**

A default school district called Sample School District is set up when Synergy SIS is installed for the first time.

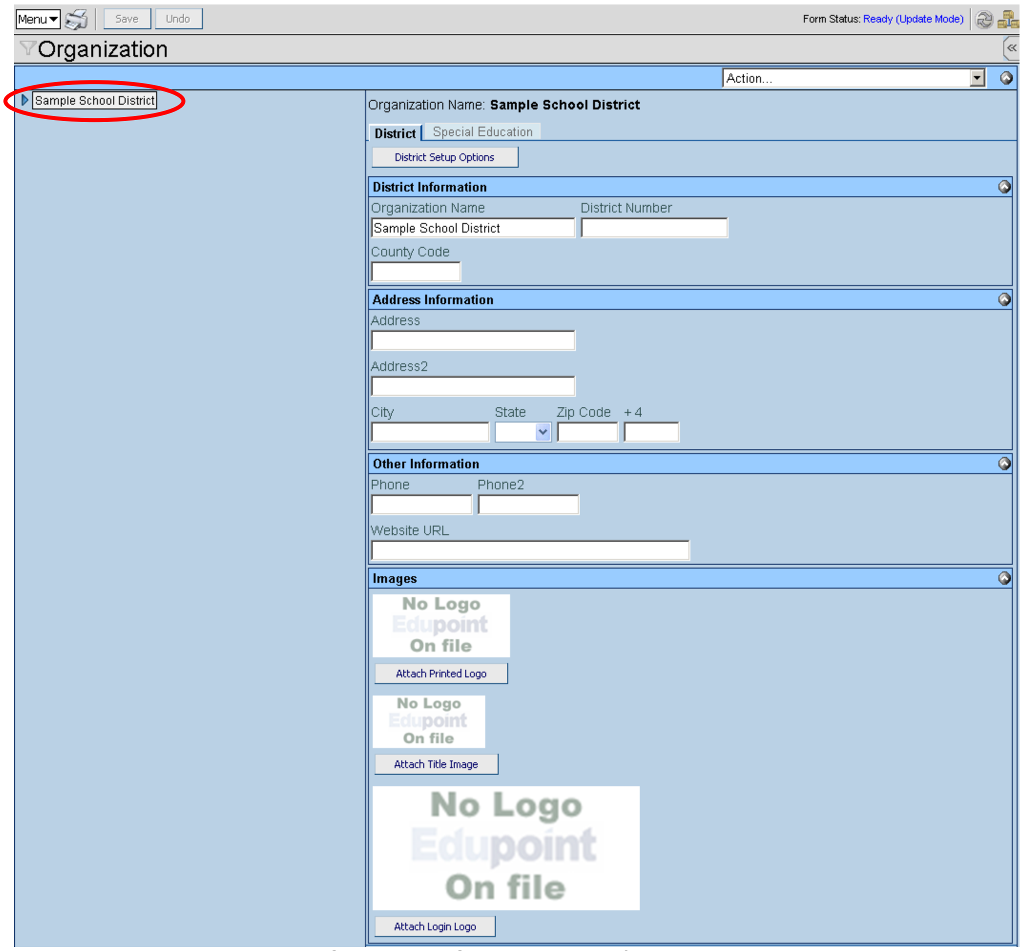
To define the district organization:

1. Go to **Synergy SIS > System > Setup > Organization**.



Organization Screen

2. To change the district name, click the **Sample School District** name. Information about the district appears on the right.



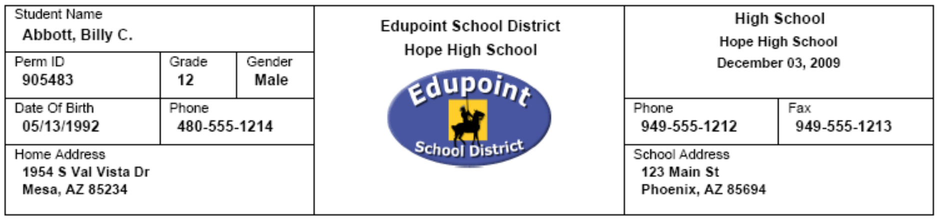
Organization Screen, District Information

The **District Setup Options** button opens the **District Setup** screen in a separate window. For information about the **District Setup** screen, see the following section in this chapter.

3. In the **District Information** section, enter
   - The actual name of the district, in the **Organization Name** box.
   - The **District Number** as assigned by the state. This is used during uploads to the state data collection system.
   - Any **Alt ID** to use in state reporting instead of the District Number.
   - The **NCES District Number** from the National Center for Education Statistics.
   - The superintendent's name and title.
   - The code for the district's county, as assigned by the state, and the county's name.
4. In the **Address Information** and **Other Information** sections, enter the district's address, phone, website URL, and default email address. This information can be automatically printed on reports.

5. In the **Images** section, upload the district logo to be used on screen and in printed reports. Three logos can be uploaded – the printed logo, the title logo, and the login logo.

   - The printed logo is displayed on reports. School and other organization logos may also appear on reports, but the title and login logos are always the district logo.

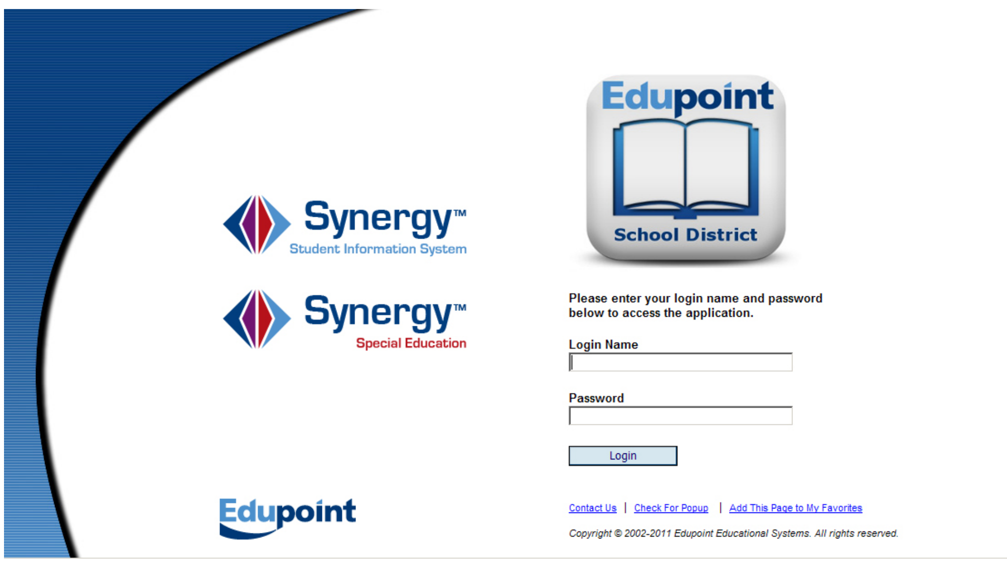


Printed Logo

   - The title logo appears at the top of the Synergy SIS window.

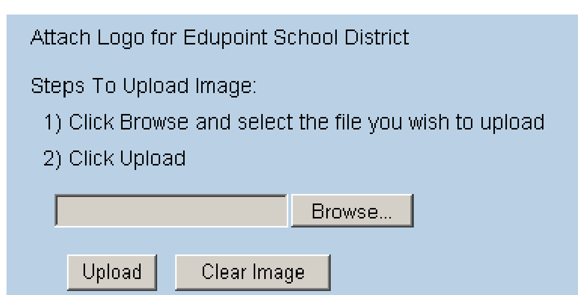
Title Logo

   - The login logo appears on the login page.



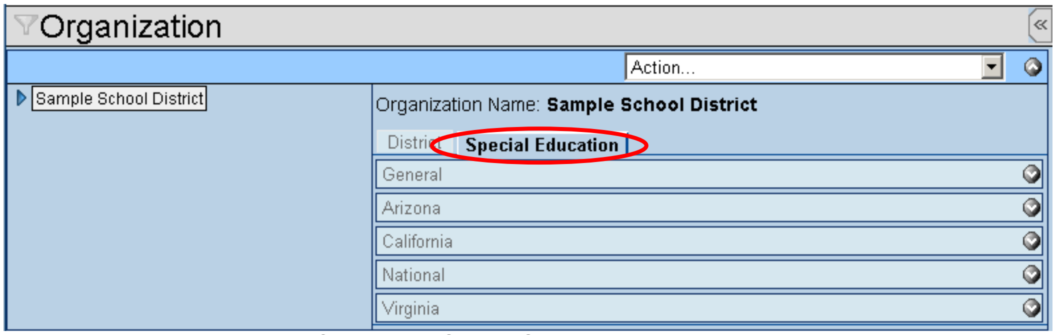
Login Logo

6. To upload each logo, click the **Attach Logo** button.



Attach Screen

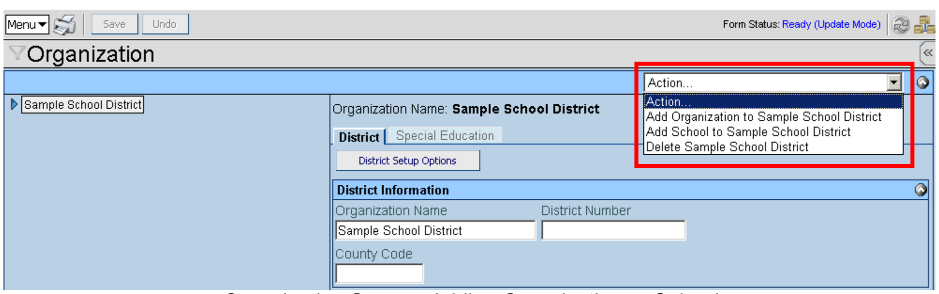
7. Click the **Browse** button to locate and select the logo file in .jpg or .png format.
8. Click the **Upload** button.
9. On the **Special Education** tab, make changes as needed to district-level information used by the Synergy SE software. For information about the setup for this tab, see the *Synergy SE – System Administrator Guide*.



Organization Screen, Special Education Tab

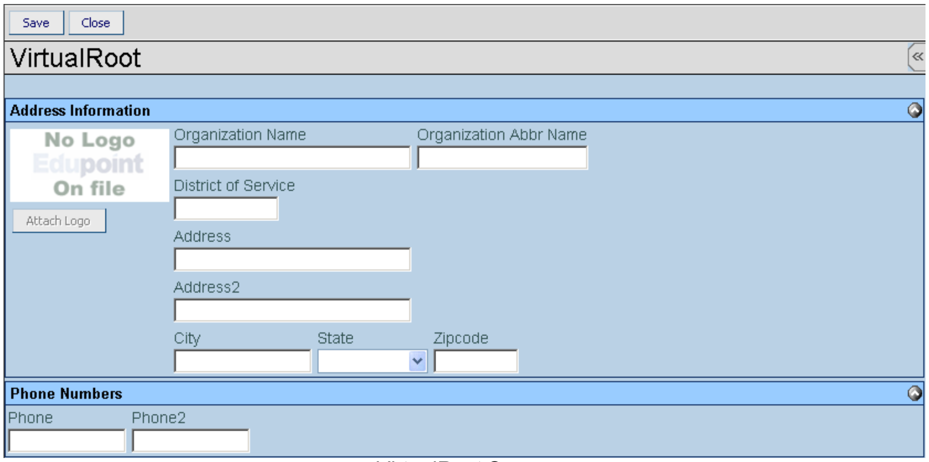
Once the district information has been entered, the next level of organization can be defined. The second level of organization can be a grouping of schools such as Elementary Schools for a larger district, or it may be the schools themselves in a smaller district. To add organizations under the district:

1. Click the name of the district, and then click the **Action…** button. To add a group, select **Add Organization to District** and continue with step 2. To add a school, select **Add School to District** and skip to step 7.



Organization Screen, Adding Organization or School

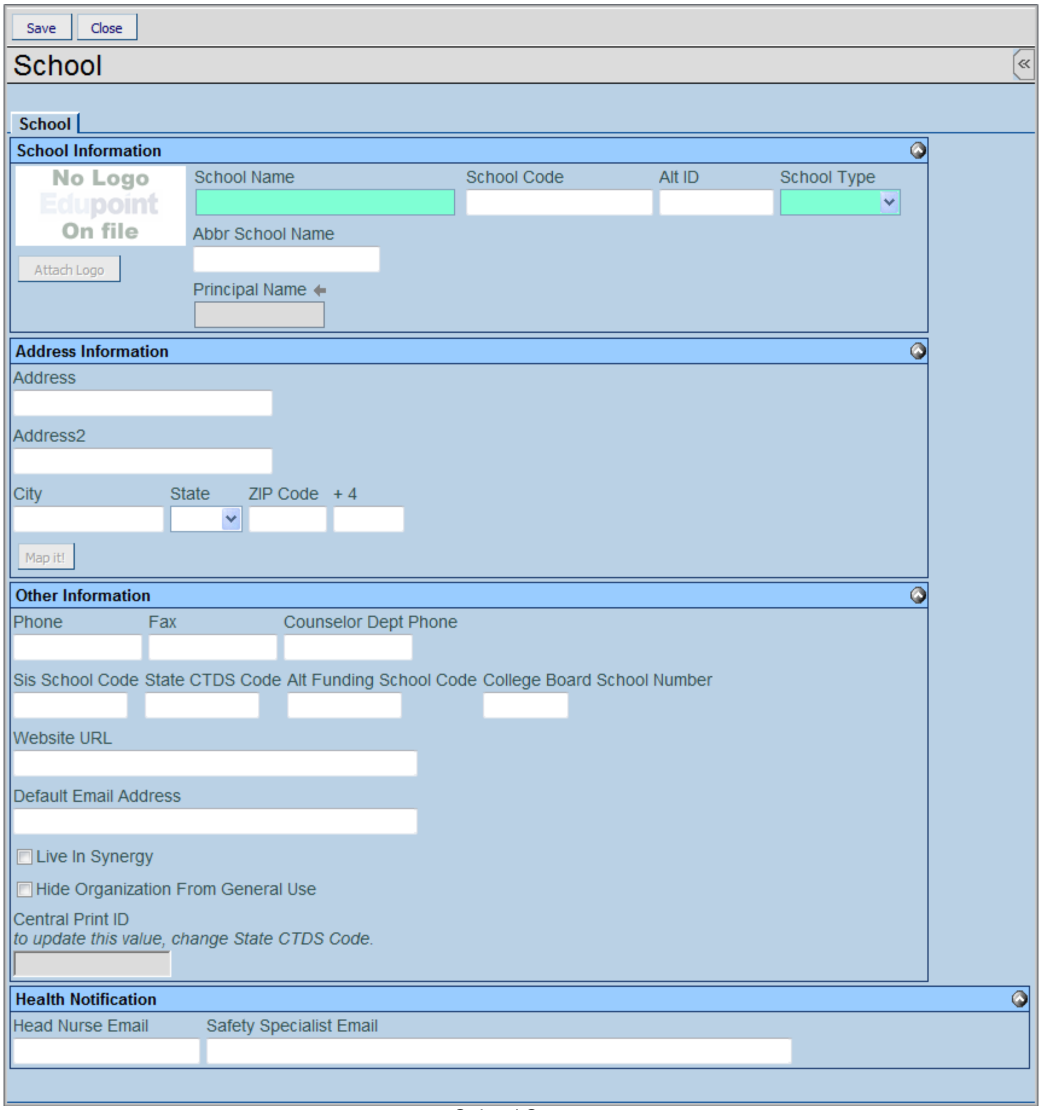
2. When adding an organization, the **VirtualRoot** screen opens. Enter the **Organization Name**, and in the **Organization Abbr Name** box, a shorter version of the name, for reports.



VirtualRoot Screen

3. Enter the number for the **District of Service** for this organization.
4. Enter the address and phone information, and default email address**,** for this organization.
5. Click the **Save** button.
6. Optionally, upload a logo for this organization by clicking the **Attach Logo** button.

7. When adding a school, the **School** screen opens. Enter the **School Name**, and in the **Abbr School Name** box, a shorter version of the name, for reports.

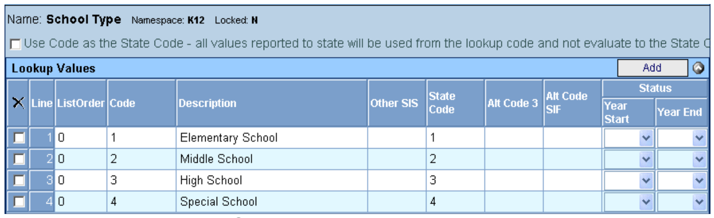


School Screen

8. Enter the **School Code**, the numeric code assigned to the school in Synergy SIS. This is generally the same number used in the previous student information system, and the same as the last three digits of the number assigned to the school by the state.

9. Any **Alt ID** to be used in state reporting instead of the **School Code**.

10. Select the type of school in the **School Type** list. By default, the types available are **Elementary School**, **Middle School**, **High School** and **Special School**. You can customize this list by modifying the lookup table **School Type**, under the **K12** namespace. For information about modifying lookup tables, see Chapter Eight.


Name: **School Type** Namespace: **K12** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C

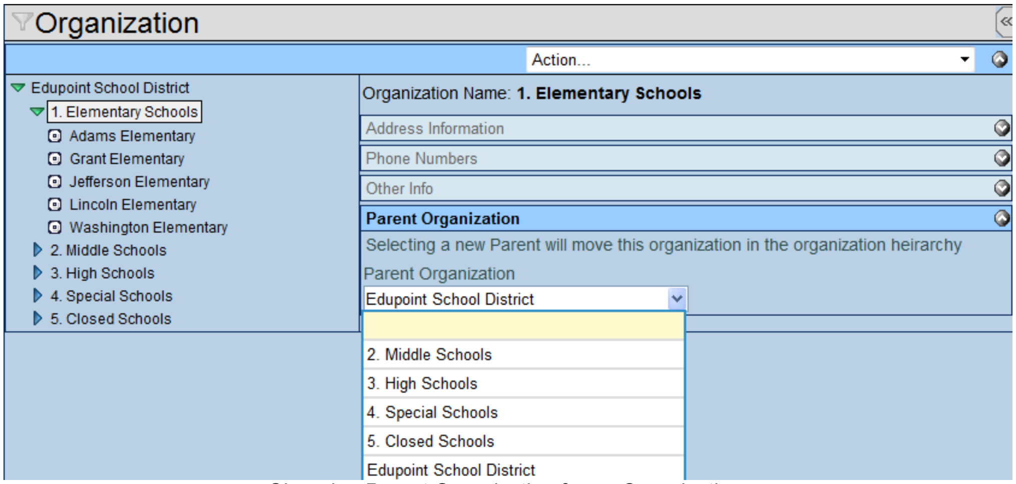
Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status	
									Year Start	Year End
	1	0	1	Elementary School		1				
	2	0	2	Middle School		2				
	3	0	3	High School		3				
	4	0	4	Special School		4				

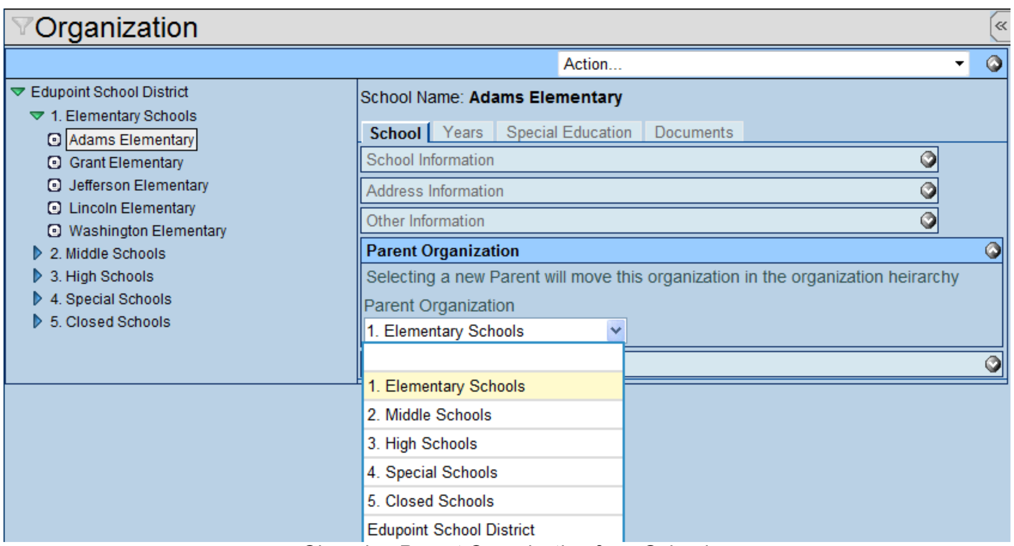
School Type Lookup Table

11. If staff names have been entered into Synergy SIS, click the gray arrow next to **Principal Name**, and find and select the principal's name.
12. Enter the address, phone, fax, and other information for the school. Specific pieces of information include the following.
    - If the guidance office has a separate phone number, that is the **Counselor Dept Phone**
    - **SIS School Code** is the numeric code assigned to the school in the previous school information system. This code is used to match the information in the previous system to the new school during data conversion. This is generally the same as the last three digits of the number assigned to the school by the state.
    - The **State CTDS Code** for the school is used to upload data to the state reporting system. The **Alt Funding School Code** applies if the school is eligible for alternative funding from the state. For information about uploading data to the state, see the *Synergy SIS – State Data Reporting Guide*.
    - If the school is no longer active in the previous student information system and all data is now modified in Synergy SIS, check the **Live in Synergy SIS** box.
    - To remove the organization from the Chooser and Find results and prevent it from being selected as an option in all data entry points through Synergy SIS, check the **Hide Organization from General Use** box. It will still be available through the focus.
    - The **Central Print ID** is based on the State CTDS Code and identifies print jobs sent for a school when the district is configured to use central printing through the **System Configuration** screen. See page 54.
    - **Head Nurse Email** is the email address used to communicate with the school nursing staff.
    - **Safety Specialist Email** is the email address used to communicate with the safety department.
13. Click the **Save** button.
14. Optionally, upload a logo for this school by clicking the **Attach Logo** button.

By default, a new school or organization is created under the organization highlighted when the school or organization is added. To reorganize the district, you can change the **Parent Organization** of the organization or school.



Changing Parent Organization for an Organization

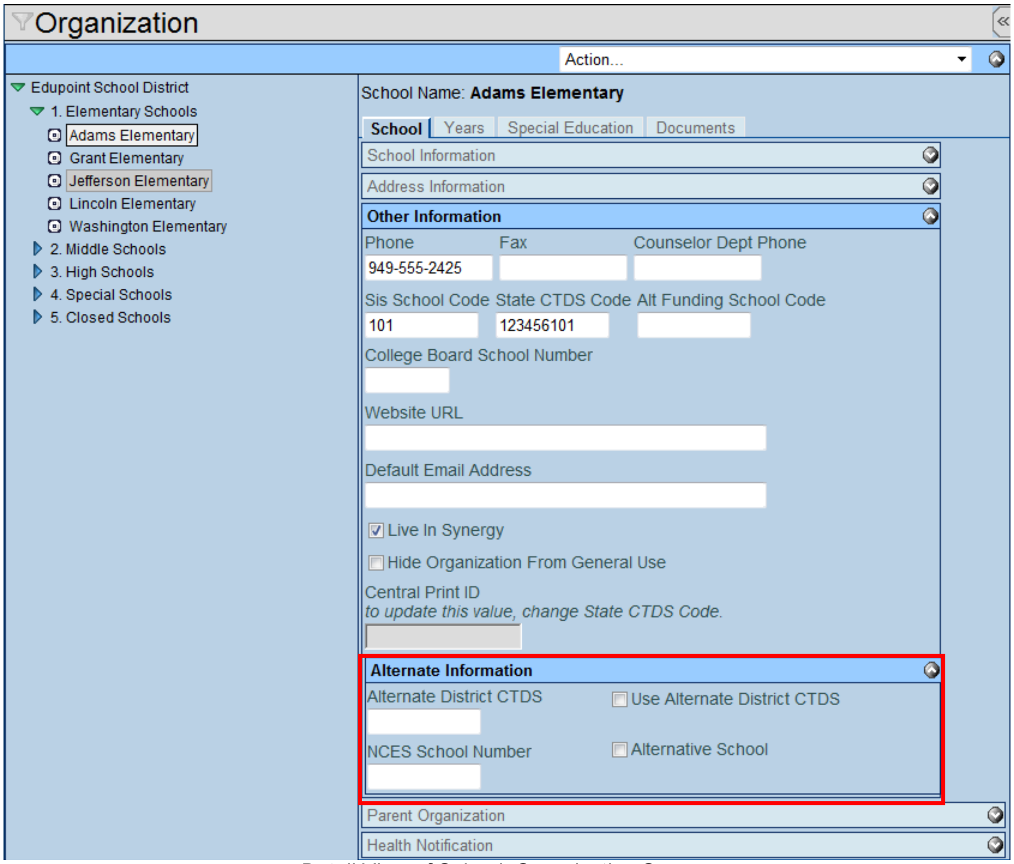


Changing Parent Organization for a School

Additional options to be set up for the school:

<u>School</u> <u>tab</u>

1. If the school should use a different district CTDS state code than the code assigned to the primary district, enter the code in the **Alternate District CTDS** box and check the **Use Alternate District CTDS** box.



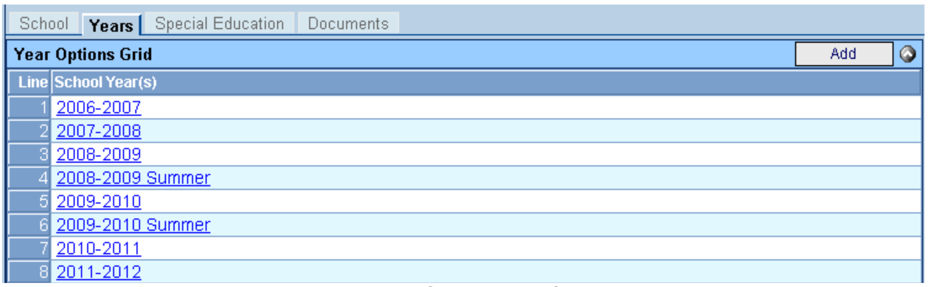
Detail View of School, Organization Screen

2. Enter the **NCES School Number** from the National Center for Education Statistics.
3. Check the **Alternative School** the box, if appropriate.

Years tab

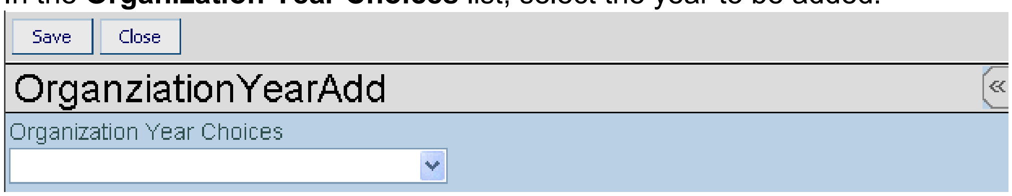
School years are configured in the **District Setup** screen, and most school years are configured to be added automatically to all schools in the district. However, some types of years, such as a summer school or night school, may not be offered at all schools. In these situations, you manually add these years to each school open for that year.

1. Click the **Add** button. The **Organization Year Add** screen opens.



Years Tab, Organization Screen

2. In the **Organization Year Choices** list, select the year to be added.

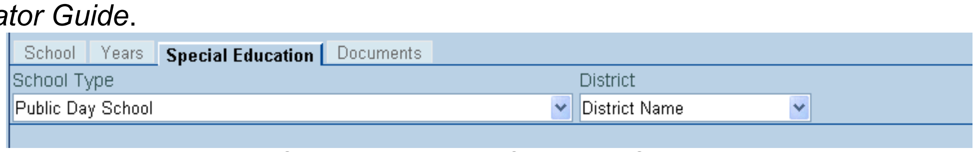


Organization Year Add Screen

3. Click the **Save** button. The new year is added to the **Year Options Grid**.
4. Click a link in the **School Year(s)** column to open the **School Setup** screen for the school and year selected.

Special Education tab

The **Special Education** tab sets the school type and district for integration with the Synergy SE special education software. For more information, see the *Synergy SE – System Administrator Guide*.

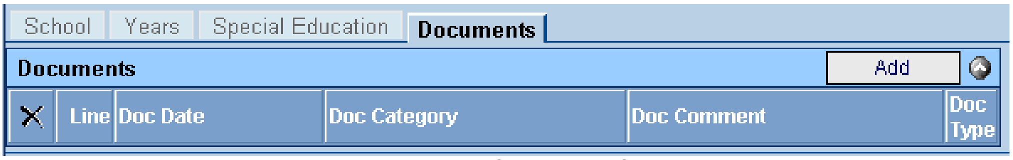


Special Education Tab, Organization Screen

<u>**Documents**</u> tab

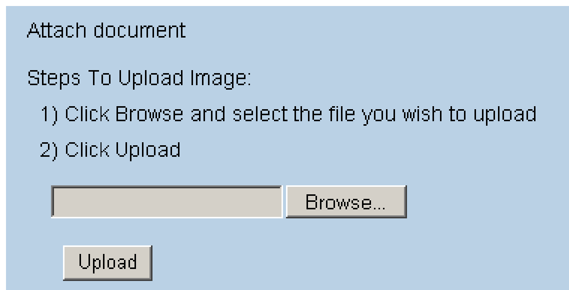
The **Documents** tab can store documents relating to the school. For example, a PDF version of the official school calendar could be attached so everyone would know where to find the official copy. Other examples include school policy documents or forms. Almost any type of file can be uploaded, including Word documents, text files, spreadsheets, PDF, or images in .bmp, .jpg, .png or .gif format.

1. Click the **Add** button.



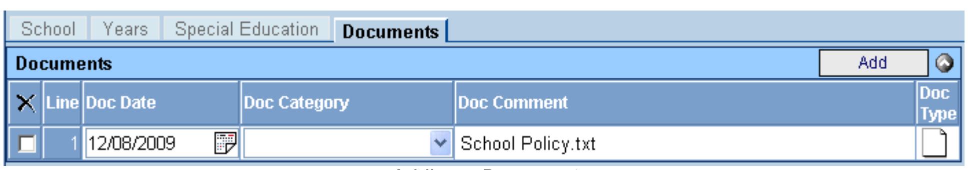
Documents Tab, Organization Screen

2. Click the **Browse** button to find and select the file to upload.



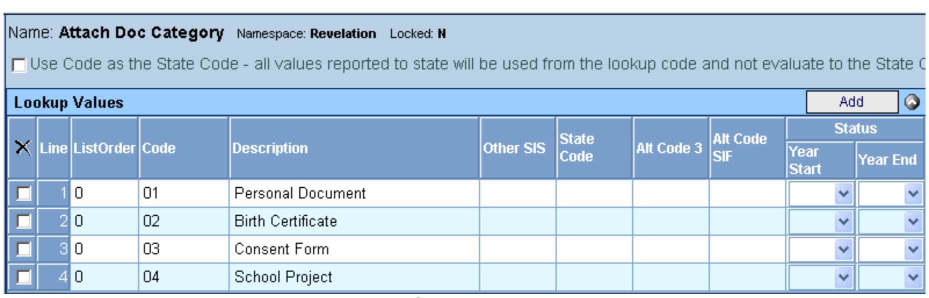
Attach Document Screen

3. Click the **Upload** button. A new line in the **Documents** grid is added, with the current date as the **Doc Date** and the name of the file in the **Doc Comment** column. You can edit these values.



Adding a Document

4. In the **Doc Category** list, select a category for the document. The same categories are used wherever a document can be attached to a screen throughout Synergy SIS, such as the **Student** screen. The categories may be customized by modifying the lookup table **Attach Doc Category**, found under the **Revelation** namespace. For more information about modifying lookup tables, see Chapter Eight.



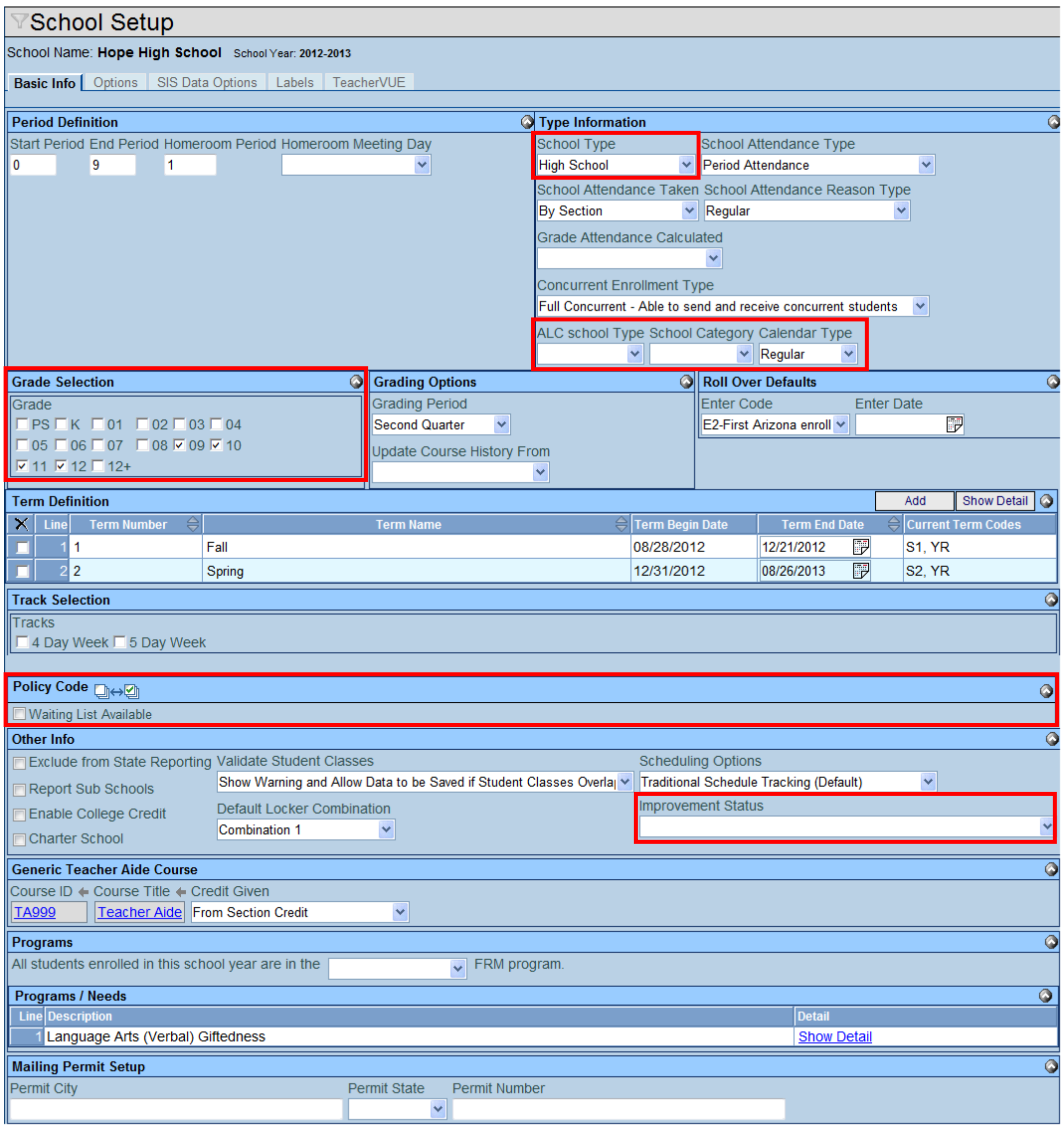
Attach Doc Category Lookup Table

5. Click the **Save** button at the top of the screen.

Once the document has been attached, it can be downloaded or opened by clicking on the icon in the **Doc Type** column.

SCHOOL SETUP

The **Basic Info** tab of the **School Setup** screen covers many aspects of the school's configuration in Synergy SIS. For the initial setup of a school:



School Setup Screen, Basic Info Tab

1. Check the boxes for the grades offered in the **Grade Selection** section.
2. Select the type of school in the **School Type** list.

3. Select **ALC School** in the **ALC School Type** list if the school is a Minnesota Alternative Learning Center.
4. Select **TAPBI** as the **School Category** if the school is an Arizona virtual school.
5. Select the type of calendar that will be used as **Regular** from the **Calendar Type**.
6. Check the boxes in the **Policy Code** section to indicate which policies are in effect for the school. These codes are customized for each district using the lookup table **School Policies**, found under **K12.Setup**. For information about lookup tables, see Chapter Nine.

Name: **School Policies** Namespace: **K12.Setup** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
	1	1	1	All Day Kindergarten						
	2	2	2	Waiting List Available						

School Policies Lookup Table

7. Select the **Improvement Status** for the school if needed. The values for this list are in the lookup table **Improvement Status**, found under **K12.Setup**. For information about lookup tables, see Chapter Nine.

Name: **Improvement Status** Namespace: **K12.Setup** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
	1	0	00	Adequate Yearly Progress						
	2	5	05	Warning						

Improvement Status Lookup Table

8. Click the **Save** button at the top of the screen.

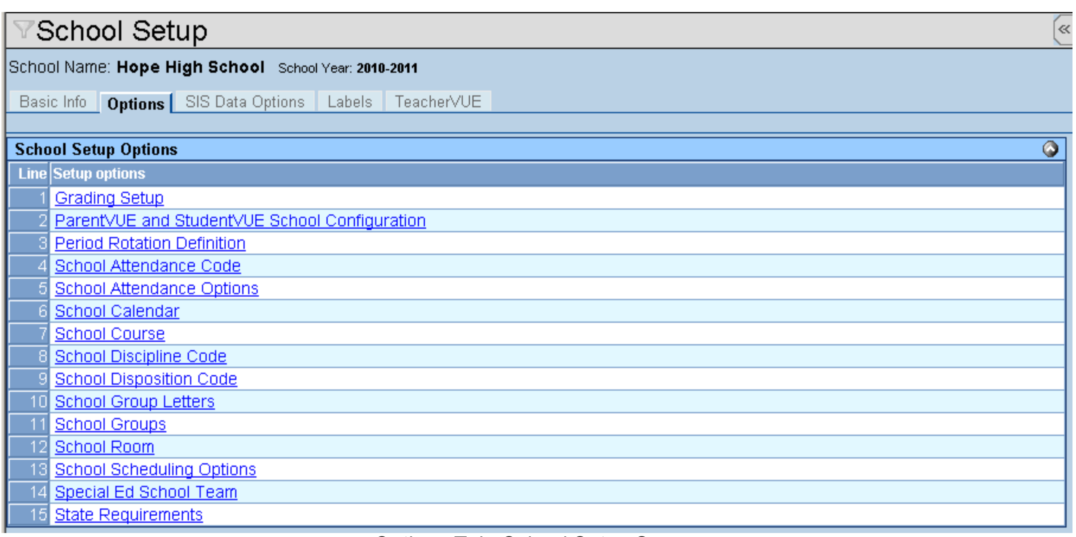
These options need to be set for each school in the district. Change the focus at the top of the screen to another school and repeat these steps for each school, or use the Copy School Setup options as explained later in this chapter.

The rest of the options on this tab are used to set up several different areas within Synergy SIS, outlined in more detail in the other administrator guides available. The areas are covered as follows:

- The **Period Definition** section is covered in detail in the *Synergy SIS – Scheduling Guide*.
- The **School Attendance Type**, **School Attendance Taken**, and **School Attendance Reason Type** lists in the **Type Information** section are described in the *Synergy SIS – Attendance Administrator Guide*.
- The **Concurrent Enrollment Type** list in the **Type Information** section is covered in the *Synergy SIS – Student Information Administrator Guide*.
- The **Grading Options** section is described in the *Synergy SIS – Grading Administrator Guide*.

- **Roll-Over Defaults** are used when transferring a student to a new school year. This is part of the setup covered in the *Synergy SIS – New Year Rollover Guide*.
- **Term Definition** is described in the *Synergy SIS – Scheduling Guide*.
- The **Track Selection** section appears only when district tracks have been defined. For more information about setting up tracks, see the *Synergy SIS – Attendance Administrator Guide*.
- The **Exclude from State Reporting** check box in the **Other Info** section is used to prevent a school's data from uploading to the state. For more information about state reporting, see the appropriate state reporting guide.
- The **Validate Student Classes** list in the **Other Info** section determines how section overlaps are handled at the school level. For more information, see the *Synergy SIS – Scheduling Guide*.
- The **Generic Teacher Aide Course** section is part of the setup to track students who act as teacher aides. For more information about this setup, see the *Synergy SIS – Scheduling Guide*.
- The **Programs** section outlines school-level options for need-based programs. For more information, see the appropriate state reporting guide.
- The **Programs / Needs** section lists district programs available at the school.
- The **Mailing Permit Setup** section contains bulk mail permit information for mailing envelopes and labels.

On the **Options** tab of the **School Setup** screen, links to commonly used school setup screens are available. These setup screens are school- and year-specific, and they can also be accessed using the navigation tree. These screens are explained in the appropriate administrator guide for the area of Synergy SIS, as listed below.

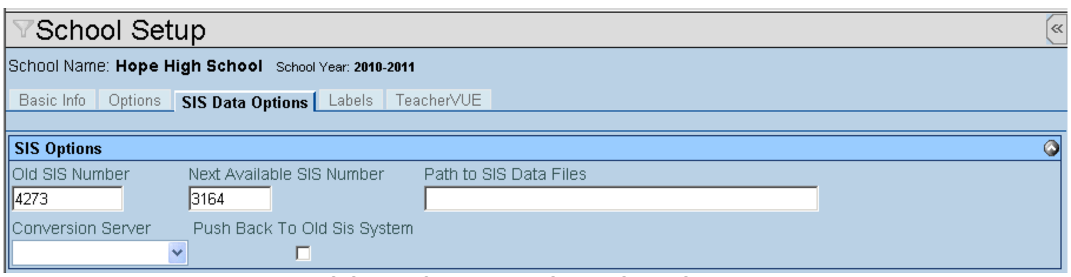


Options Tab, School Setup Screen

- **Grading Setup** – This screen is in Synergy SIS > Grading > Setup and is explained in the *Synergy SIS – Grading Administrator Guide.*

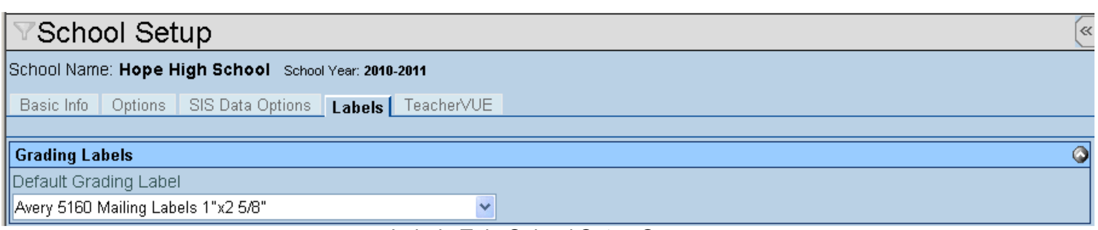
- **ParentVUE and StudentVUE School Configuration** – This screen is in Synergy SIS > System > ParentVUE and is explained in the *Synergy SIS – ParentVUE & StudentVUE Administrator Guide.*
- **Period Rotation Definition**, **School Attendance Code, School Attendance Options, and School Calendar** – These screens are in Synergy SIS > Attendance > Setup and are explained in the *Synergy SIS – Attendance Administrator Guide.*
- **School Course** – This screen is in Synergy SIS > Course and is explained in the *Synergy SIS – Scheduling Guide*.
- **School Discipline Code and School Disposition Code** – These screens are in Synergy SIS > Discipline Incident > Setup and are explained in the *Synergy SIS – Discipline & Conference Administrator Guide.*
- **School Group Letters and School Groups** – These screens are in Synergy SIS > Student > Setup and are explained in the *Synergy SIS – Student Groups Administrator Guide.*
- **School Room and School Scheduling Options** – These screens are in Synergy SIS > System > Setup and are explained in the *Synergy SIS – Scheduling Guide.*
- **Special Ed School Team** – This screen is in Synergy SE > System > Setup and is covered in the *Synergy SE – System Administrator Guide.*
- **State Requirements** – This screen is in Synergy SIS > System > Setup but is not currently used.

The **SIS Data Options** tab of the **School Setup** screen sets up the link to the previous student information system for conversion to Synergy SIS. These options are explained in the *Synergy SIS – Data Conversion Guide*.



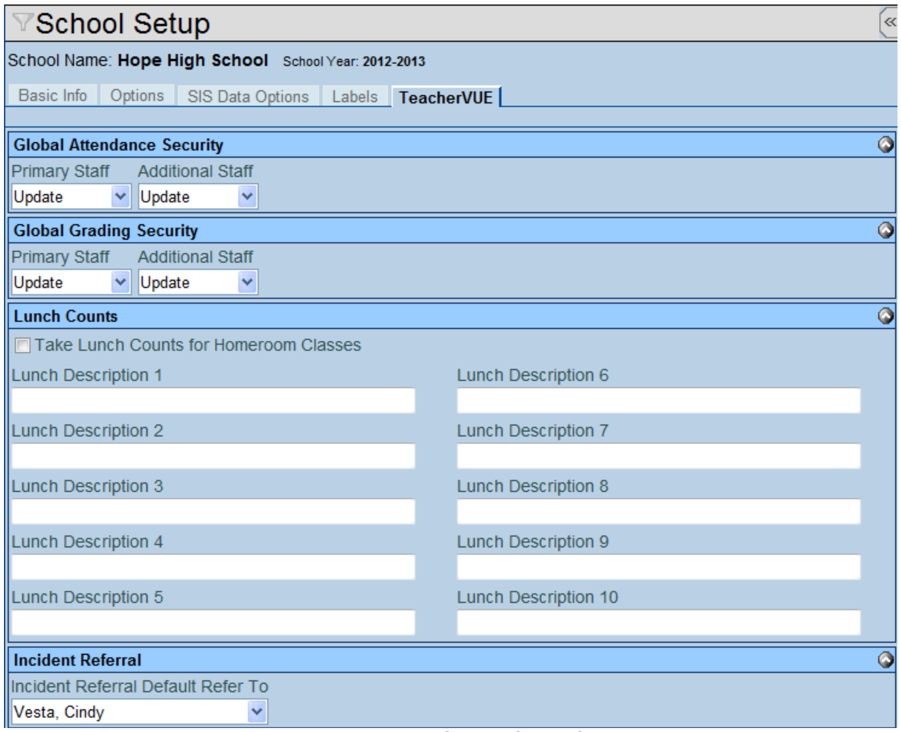
SIS Data Options Tab, School Setup Screen

The **Labels** tab of the **School Setup** screen sets the default label definition to be used when printing report cards. The label definitions need to be defined first, as described in Chapter 8. The default grading label may also be set at the district level. For information about setting up grading options, see the *Synergy SIS – Grading Administrator Guide*.



Labels Tab, School Setup Screen

The **TeacherVUE** tab of the **School Setup** screen configures the grading and attendance security in the TeacherVUE software, as well as the Lunch Counts function and the staff member to receive incident referrals. For information about TeacherVUE, see the *Synergy SIS – TeacherVUE Administrator Guide*.



TeacherVUE Tab, School Setup Screen

COPY SCHOOL SETUP

Because many of the settings at the school level are the same for all schools in a district, one school can be configured and the settings copied to other schools. This can speed up the configuration greatly.

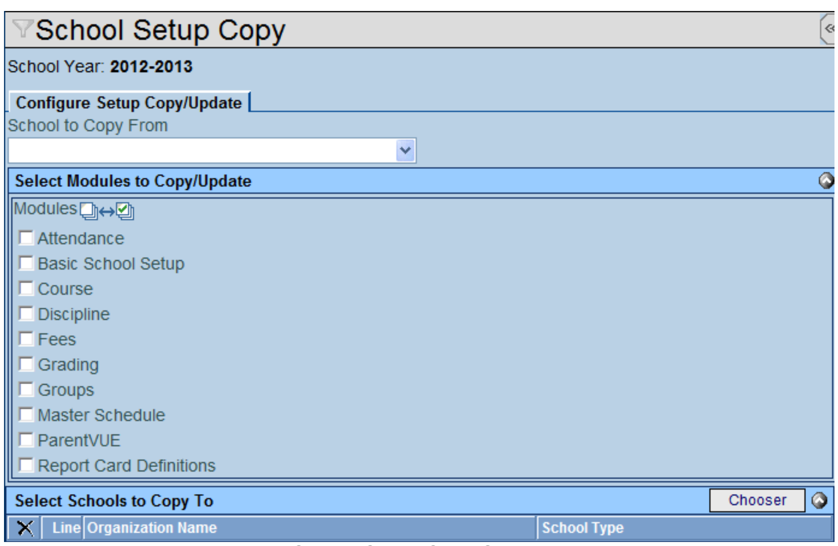
However, certain settings must already be configured in the school to which the setup is copied, depending on the modules selected. The requirements for each module are:

- **Any module** – the year and year extension must be set up for the school in the **Organization** screen.
- **Attendance** – the basic school setup must already be copied or must otherwise exist at the school.
- **Grading** – the attendance setup and basic school setup must already be copied or must otherwise exist at the school.

Note – If data has already been entered at the school, setup information cannot be copied to it. For example, if grades have already been posted to a school, the Grading module cannot be copied to it.

To copy school settings:

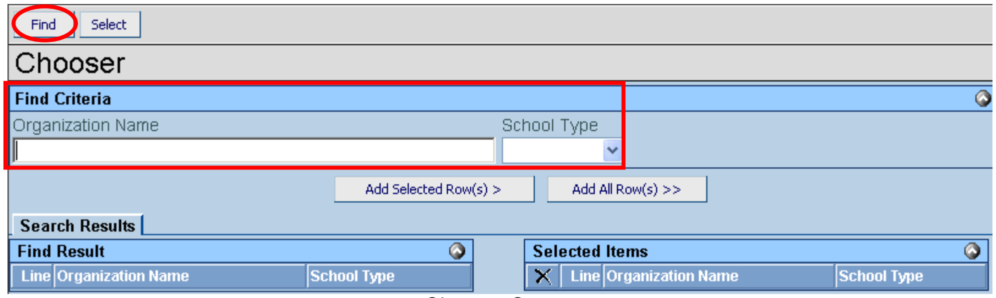
1. Go to **Synergy SIS > System > Data Maintenance > School Setup Copy**.



School Setup Copy Screen

2. Select the **School to Copy From**.
3. Check the modules to copy. To check or uncheck all of the modules, click the Check/Uncheck All button.
4. Select the schools to copy the setup to by clicking the **Chooser** button.

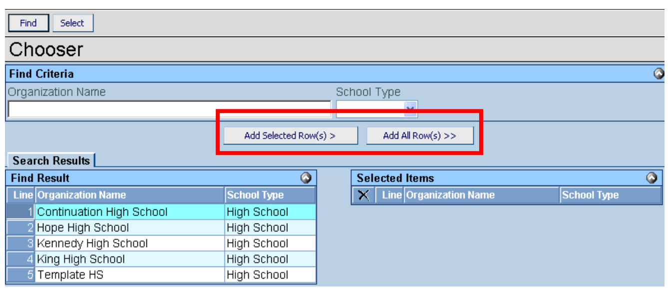
5. The **Chooser** screen opens in a separate window. Enter the criteria to be used to select the schools in the **Find Criteria** section, and click the **Find** button. The schools matching the criteria are listed in the **Find Result** grid.



Chooser Screen

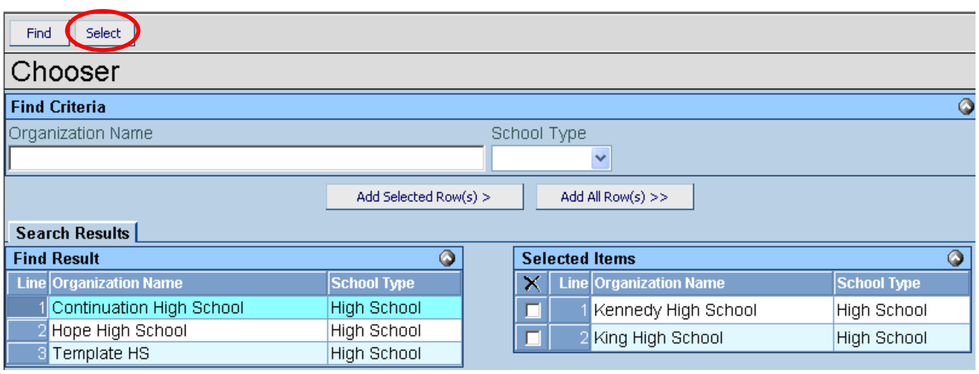
6. Click a school name to select it, and then click the **Add Selected Row(s)>** button. To add multiple schools at a time, hold the CTRL button down while clicking on multiple school names to select them. Or to add all the schools matching the criteria, click the **Add All Row(s)>>** button.

   The school names are moved to the **Selected Items** grid.



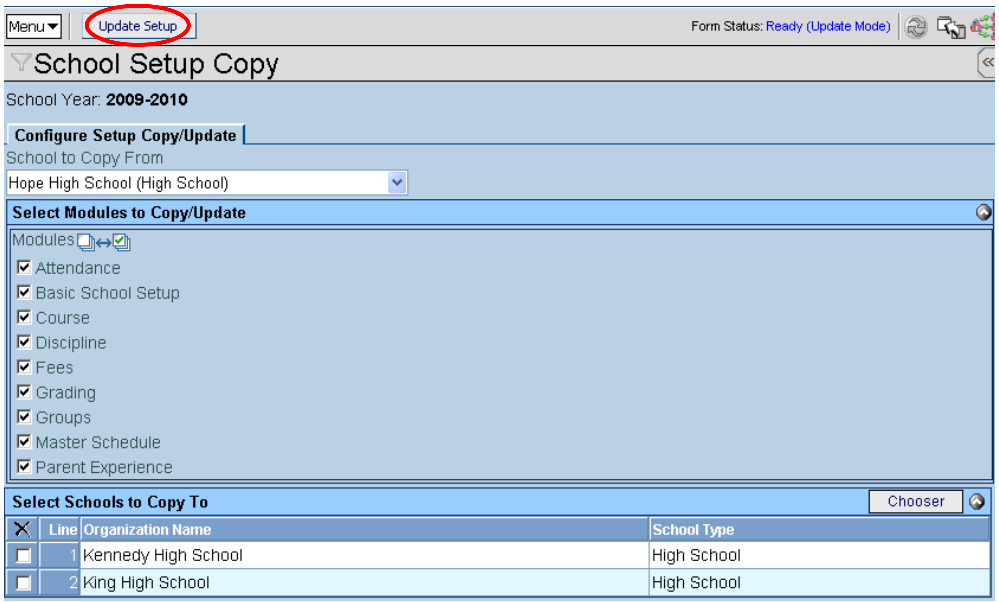
Chooser, Find Results

7. Click the **Select** button to add the schools to the **Select Schools to Copy To** grid.



Chooser Screen, Selected Items

8. Click the **Update Setup** button at the top of the screen to begin the copy process.

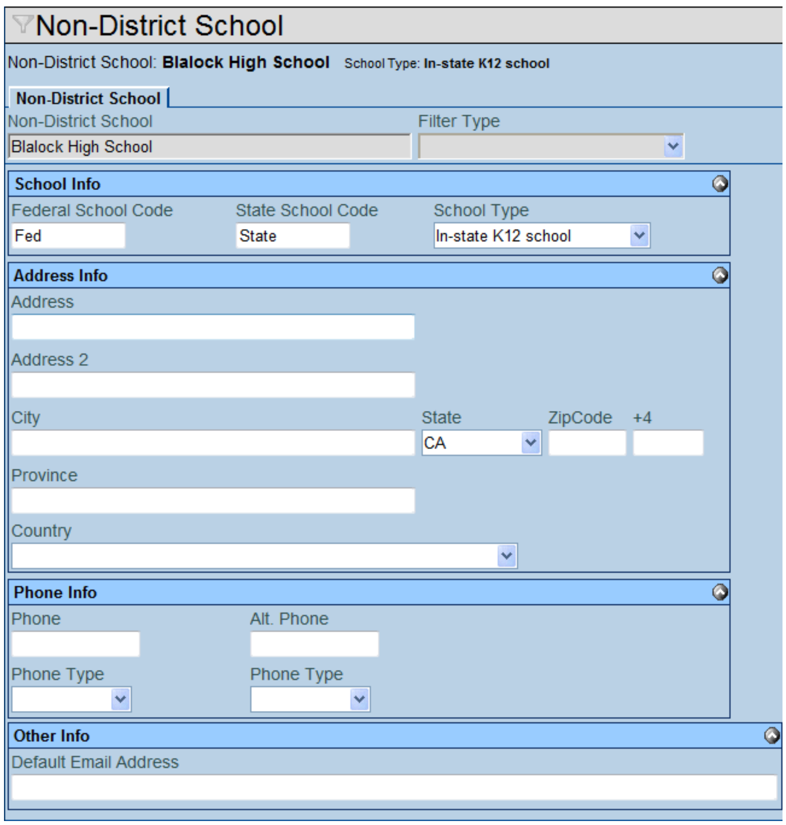


Running the School Setup Copy Process

NON-DISTRICT SCHOOLS

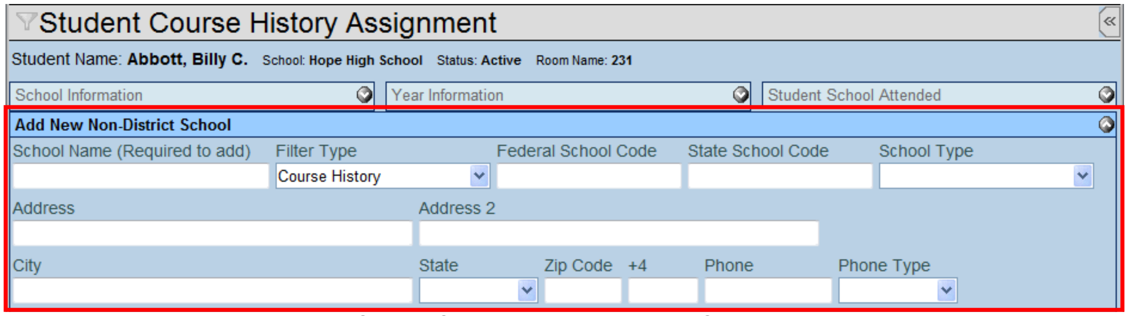
When a student transfers to a new school from outside the district, the courses from the old school need to be recorded in Course History to provide a complete picture of the student's academic progress. However, to maintain accurate records, the courses are entered into Course History indicating that the courses were completed at a non-district school. This information is displayed in the detail screen of the course in Course History.

The non-district school name is selected from a list, which is maintained in the **Non-District School** screen.



Non-District School Screen

Non-district schools can be added on the fly from the **Student Course History Assignment** screen available through the **Add Course History** button on the **Course History** tab of **Synergy SIS > Course History > Student Course History**.



Student Course History Assignment Screen

For information about Course History and maintaining the non-district schools list, see Chapter 3 of the *Synergy SIS – Course History Administrator Guide*.

Chapter Four: STAFF AND USERS

This chapter covers:

- ► Staff Setup
- ► Adding New Staff
- ► Combining and Cleaning Staff Records
- ► Assigning Existing Staff to Schools
- ► Editing Staff Data
- ► Overview of Users Setup
- ► Adding User Groups
- ► Editing User Groups
- ► Adding Users
- ► Editing Users

Staff members are generally listed in two places: the **Staff** screen and the **User** screen.

The **Staff** screen lists all staff that may be assigned as teachers or counselors or other roles. Being listed in the **Staff** screen does not give a person access to Synergy SIS.

Staff listed in the **User** screen can log in to Synergy SIS. A person cannot be added to the **User** screen unless already listed in the **Staff** screen.

If a person has a staff record and a user record, the **Open User Window** button on the **Staff** screen is available. This can be useful, when making changes to an individual's record on the **Staff** screen, for going directly to the **User** screen to make related changes.

STAFF SETUP

Before you work with the **Staff** screen, some setup is required. On each tab of the **Staff** screen are lists where you select values. The values are stored in lookup tables that you modify, using **Synergy SIS > System > Setup > Lookup Table Definition**, to match the needs of the district.

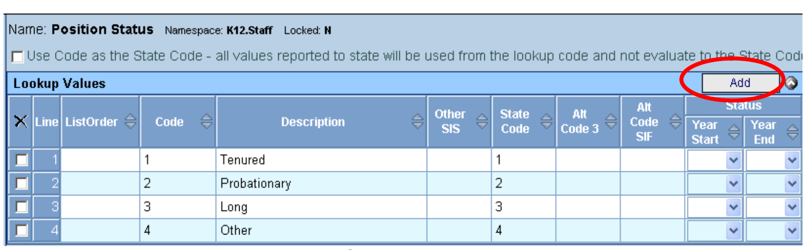
Some lookup tables are considered "product-owned"; the values in these tables are hard-coded and cannot be changed.

To modify a lookup table's values:

1. Go to **Synergy SIS > System > Setup > Lookup Table Definition**.
2. Navigate to the table that needs to be changed by clicking nodes under Lookup Table Maintenance. Most of the lookup tables for the Staff screen are found under the node **K12.Staff**.

   The order in which the values are displayed is set by numbers in the **ListOrder** column. If the numbers in the **ListOrder** column are the same or blank, the **Code** is used to sort the list, and then the **Description**.

   The check box at the top of the table, **Use Code as the State Code**, is generally not used. By default, the code in the **Code** column is used for the state transactions, unless there is a code entered in **State Code**. If a code is entered in the **State Code** column, that code is used.
3. Click the **Add** button to add a new code.



Name: Position Status Namespace: K12.Staff Locked: N

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
	1		1	Tenured		1				
	2		2	Probationary		2				
	3		3	Long		3				
	4		4	Other		4				

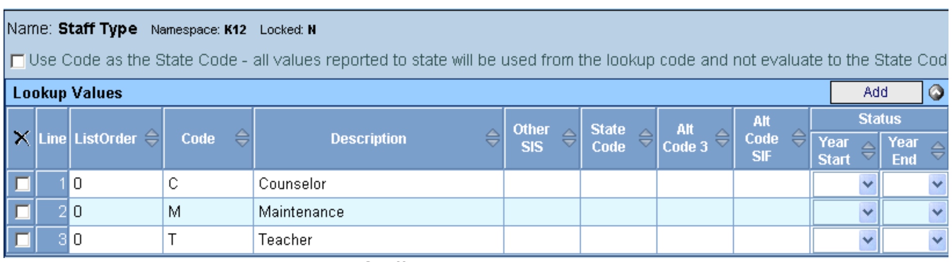
Position Status Lookup Table

4. Enter a code for the item in the **Code** column. This value must be unique.
5. Enter a description in the **Description** column.

6. If data will be imported from another student information system, enter in the **Other SIS** column the code used in the previous system.
7. If the lookup table contains values that are uploaded to the state, and the state has set a code for the value that is different than the code listed in the **Code** column, enter it in the **State Code** column.
8. If appropriate, enter a start date and end date in the **Status** column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but is not available for selection for new transactions in the screen.
9. To flag the value as having a special value, or to indicate an additional code for data integration with another system, use **Alt Code 3**.
10. Enter the code used in the SIF (Schools Interoperability Framework) schema for this value in the **Alt Code SIF** column.
11. Click the **Save** button at the top of the screen.

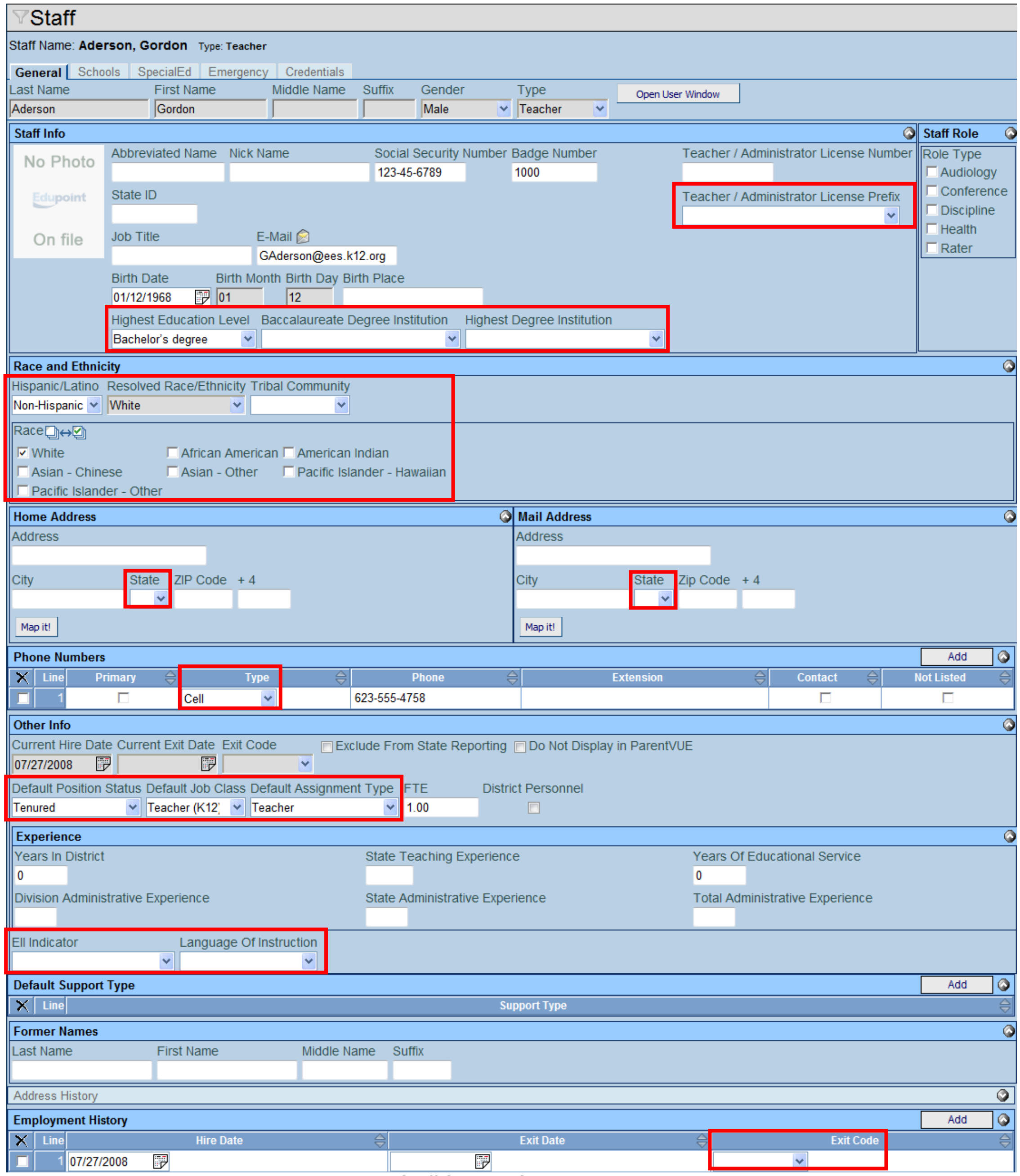
All tabs of the **Staff** screen have the following lists at the top:

- **Gender** – the code for the staff's gender as assigned by the state. These values are mandated by the state, and the setup for this lookup table is described in the state reporting guide.
- **Type** – the category for the staff. The lookup table is under **K12**, and the table name is **Staff Type**.



Staff Type Lookup Table

The **General** tab of the **Staff** screen has the following lookup tables:



Staff Screen, General Tab

- **Teacher / Administrator License Prefix** – license types. The lookup table is under **K12.Staff**, and the table name is **Teacher Administrator License Prefix**.

Name: **Teacher Administrator License Prefix** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	0	10	Special License						
☐	2	0	11	Vocational Evaluator License						
☐	3	0	3	Collegiate License						
☐	4	0	4	Normal Professional License						

Teacher Administrator License Prefix Table

- **Highest Education Level** – the highest level of education completed. The lookup table is under **K12**, and the table name is **Staff Education Level**.

Name: **Staff Education Level** Namespace: **K12** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	1	1	Doctorate						
☐	2	2	2	Master's degree plus 30 or more ser						
☐	3	3	3	Master's degree						
☐	4	4	4	Bachelor's degree plus 30 or more s						
☐	5	5	5	Bachelor's degree						
☐	6	6	6	Less than bachelor's degree						

Staff Education Level Lookup Table

- **Baccalaureate Degree Institution** – the institution where the staff member earned a baccalaureate degree. The lookup table is under **K12.Staff**, and the table name is **Institution**.

Name: **Institution** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	1	AK	Alaska						
☐	2	1	AL	Alabama						
☐	3	1	AR	Arkansas						
☐	4	1	AZ	Arizona						

Institution Lookup Table

- **Highest Degree Institution** – the institution where the staff member earned his or her highest degree. The lookup table is the same as for **Baccalaureate Degree Institution**: under **K12.Staff**, table name **Institution**.
- **Hispanic/Latino** –The lookup table is under **Revelation**, and the table name is **Hispanic Ethnicity**. It is a product-owned table that you cannot modify.
- **Resolved Race/Ethnicity** – a calculated field based on selection in **Hispanic/Latino** and **Race**.
- **Tribal Community** –The lookup table is under **K12.Demographics**, and the table name is **Tribal Community**.

Name: **Tribal Community** Namespace: **K12.Demographics** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	0	F	Fort McDowell	F					
☐	2	0	I	Mesa In-town	I					
☐	3	0	S	Salt River Pima	S					

Tribal Community Lookup Table

- **Race** – the staff member's race. Unlike a list, these check boxes enable users to select more than one value. The lookup table is under **Revelation**, and the table name is **Ethnicity**.

Name: **Ethnicity** Namespace: **Revelation** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		01	White	1	W	W			
☐	2		02	African American	2	B	B			
☐	3		04	American Indian	4	A	AI			
☐	4		05	Asian - Chinese		A	A			
☐	5		11	Asian - Other		A	A			
☐	6		12	Pacific Islander - Hawaiian		A	P			
☐	7		16	Pacific Islander - Other		A	P			

Ethnicity Lookup Table

- **State -** the U.S. state where the staff member lives. The underlying lookup table is shared with any list where a U.S. state can be selected, such as in the **Student** screen. These values are mandated by the state, and the setup for this lookup table is described in the state reporting guide.
- **Type** (**Phone Numbers** section) – the type of phone number, such as home or cell. The underlying lookup table is used wherever a phone number is entered, such as for parents, students, and emergency contacts. The lookup table is under **Revelation**, and the table name is **Phone Type**.

Name: **Phone Type** Namespace: **Revelation** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	0	C	Cell						
☐	2	0	F	Fax						
☐	3	0	H	Home						
☐	4	0	M	Mobile						
☐	5	0	P	Pager						
☐	6	0	W	Work						

Phone Type Lookup Table

- **Default Position Status** – the status of the staff's position, such as tenured or probationary. The lookup table is under **K12.Staff**, and the table name is **Position Status**.

Name: **Position Status** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		1	Tenured		1				
☐	2		2	Probationary		2				
☐	3		3	Long		3				
☐	4		4	Other		4				

Position Status Lookup Table

- **Default Job Class** – the job classification for the staff. In some states, this is a state-mandated value. The lookup table is under **K12.Staff**, and the table name is **Job Class**. This lookup table is also used on the **Schools** tab and the **Credentials** tab of the **Staff** screen.

Name: **Job Class** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		10	Administrator (K12)		10				
☐	2		11	Pupil service (K12)		11				
☐	3		12	Teacher (K12)		12				
☐	4		15	Administrator (Adult Ed)		15				
☐	5		16	Pupil service (Adult Ed)		16				
☐	6		17	Teacher (Adult Ed)		17				
☐	7		19	Clerical		19				
☐	8		23	Paraprofessional		23				
☐	9		24	Other classified staff		24				

Job Class Lookup Table

- **Default Assignment Type** – the default type of class the teacher is assigned. The lookup table is under **K12.CourseInfo**, and the table name is **State Cat**. These values are also used in the **District Course** screen.

Name: **State Cat** Namespace: **K12.CourseInfo** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		1001	Grade 1		1001				
☐	2		1002	Grade 2		1002				
☐	3		1003	Grade 3		1003				
☐	4		1004	Grade 4		1004				
☐	5		1005	Grade 5		1005				
☐	6		1006	Grade 6		1006				
☐	7		1007	Grade 7		1007				
☐	8		1008	Grade 8		1008				
☐	9		1009	Combination class (K - 3)		1009				
☐	10		1010	Combination class (4 - 8)		1010				
☐	11		1012	Combination class (3 - 4)		1012				
☐	12		2100	Reading improvement/developmental		2100	X			
☐	13		2101	Comprehensive English		2101				
☐	14		2102	Basic English/Language Art (Proficie		2102	X			

State Cat Lookup Table

- **ELL Indicator** – the type of ELL class the teacher is eligible to teach. The lookup table is under **K12.CourseInfo**, and the table name is **ELL Indicator**. These values are also used in the **District Course** screen.

Name: **Ell Indicator** Namespace: **K12.CourseInfo** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		1	Primary language		1				
☐	2		2	ELD only		2				
☐	3		3	SDAIE only		3				
☐	4		4	ELD and SDAIE		4				

ELL Indicator Lookup Table

- **Language of Instruction** – the language in which the teacher primarily teaches. This is the default language lookup table used in many screens. These values are mandated by the state, and the setup for this lookup table is outlined in the state reporting guide.
- **Support Type** (**Default Support Type** section) – if the staff is in a non-teaching position, the type of position it is. The lookup table is under **K12.Staff**, and the table name is **Support Type**.

Name: **Support Type** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	1	1	Superintendent		0100				
☐	2	2	2	Counselor		0400				

Support Type Lookup Table

- **Exit Code** (**Employment History** section) – the reason for leaving a previous job. The lookup table is under **K12.Staff**, and the table name is **Staff Exit Code**.

Name: **Staff Exit Code** Namespace: **K12.Staff** Locked: **N**

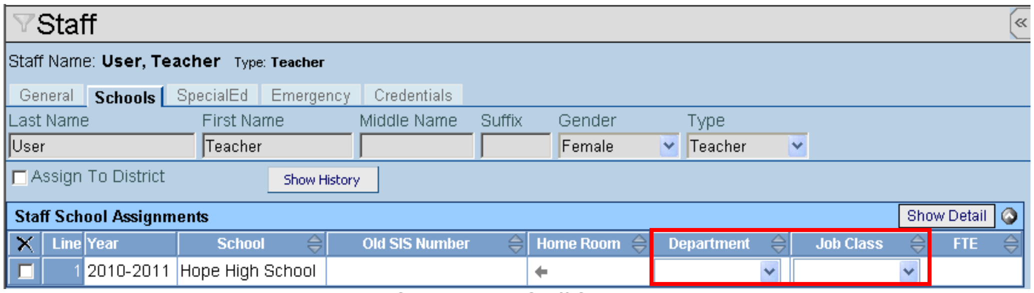
☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

✕	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1	0	1	Left state						
☐	2	1	2	Took non-teaching position in district						

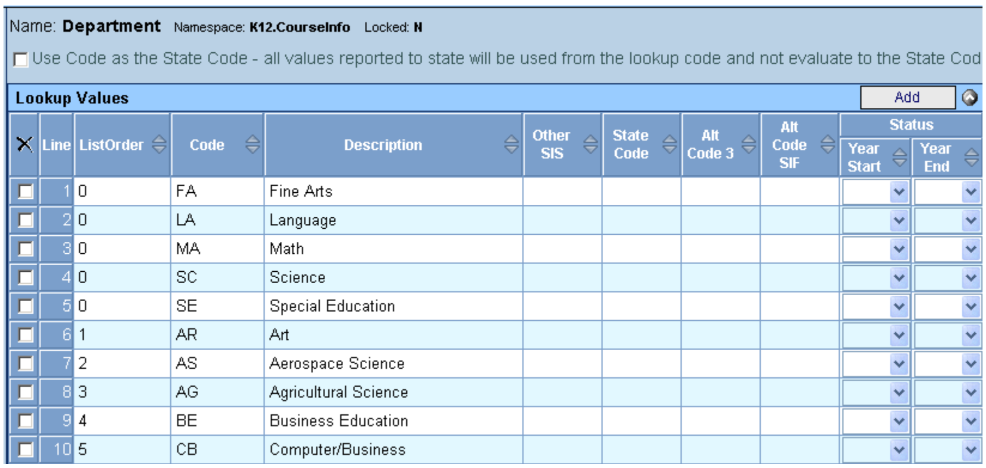
Staff Exit Code Lookup Table

The **Schools** tab of the **Staff** screen has the following lookup tables:



Schools Tab, Staff Screen

- **Department** – the department to which the staff is assigned. This lookup table is also used to assign departments to courses. The lookup table is under **K12.CourseInfo**, and the table name is **Department**.



Name: **Department** Namespace: **K12.CourseInfo** Locked: **N**

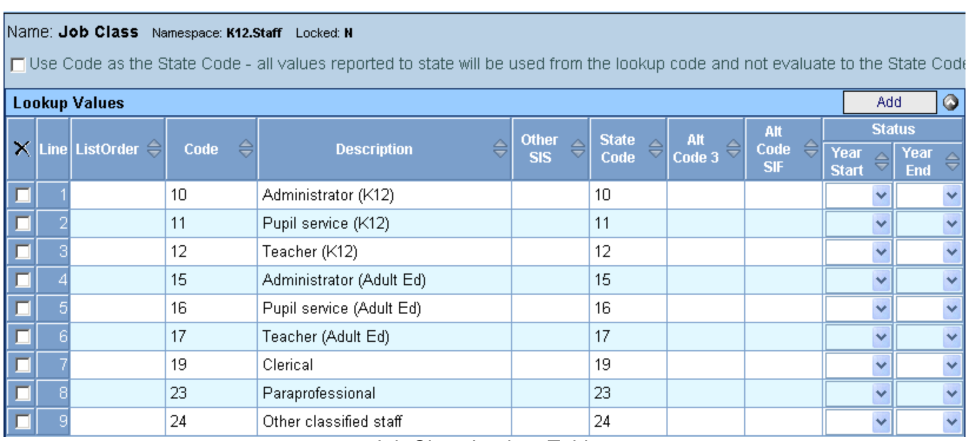
Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
1	0	FA	Fine Arts						
2	0	LA	Language						
3	0	MA	Math						
4	0	SC	Science						
5	0	SE	Special Education						
6	1	AR	Art						
7	2	AS	Aerospace Science						
8	3	AG	Agricultural Science						
9	4	BE	Business Education						
10	5	CB	Computer/Business						

Department Lookup Table

- **Job Class** – the job classification for the staff. In some states, this is a state-mandated value. The lookup table is under **K12.Staff**, and the table name is **Job Class**. This lookup table is also used on the **Schools** tab and the **Credentials** tab of the **Staff** screen.



Name: **Job Class** Namespace: **K12.Staff** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

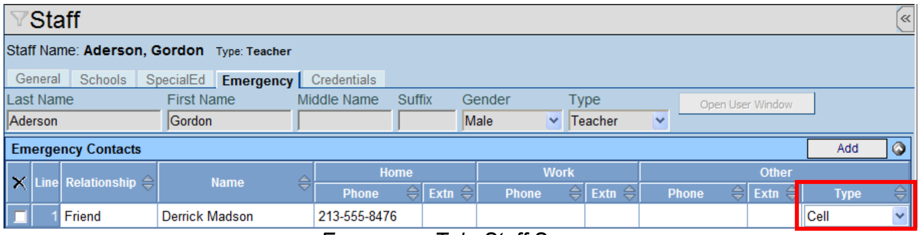
Lookup Values Add

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
1		10	Administrator (K12)		10				
2		11	Pupil service (K12)		11				
3		12	Teacher (K12)		12				
4		15	Administrator (Adult Ed)		15				
5		16	Pupil service (Adult Ed)		16				
6		17	Teacher (Adult Ed)		17				
7		19	Clerical		19				
8		23	Paraprofessional		23				
9		24	Other classified staff		24				

Job Class Lookup Table

The **Special Ed** tab has no lookup tables.

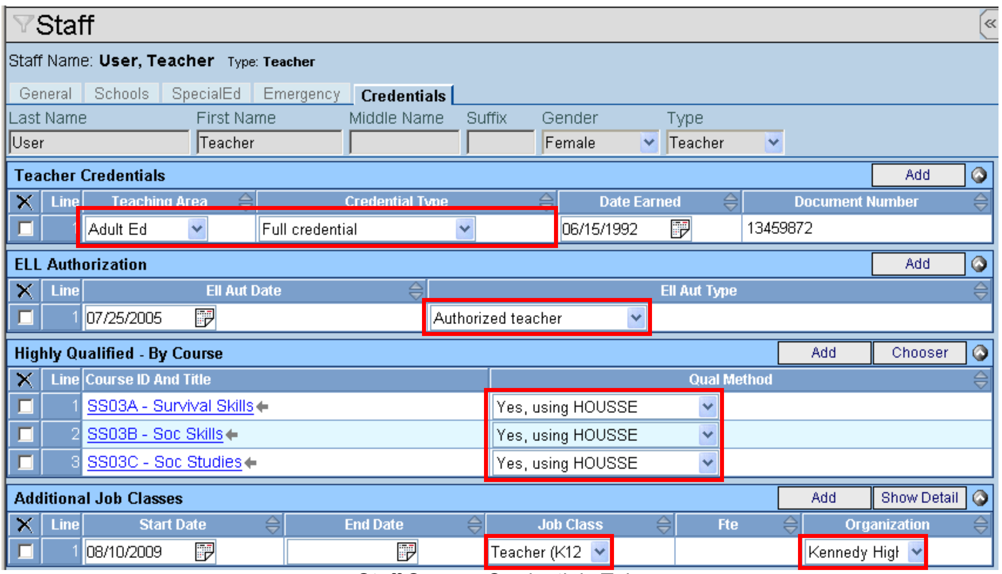
The **Emergency** tab has one lookup table: the **Type** of the **Other** phone.



Emergency Tab, Staff Screen

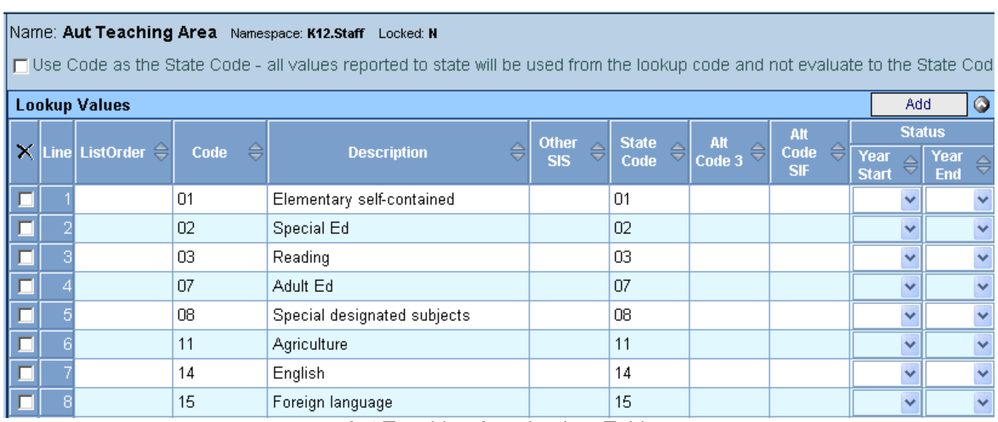
The lookup table is under **Revelation**, and the table name is **Phone Type**.

The **Credentials** tab of the **Staff** screen has the following lookup tables:



Staff Screen, Credentials Tab

- **Teaching Area** – the teaching area in which the teacher is certified. The lookup table is under **K12.Staff**, and the table name is **Aut Teaching Area**.



Name: **Aut Teaching Area** Namespace: **K12.Staff** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
1		01	Elementary self-contained		01				
2		02	Special Ed		02				
3		03	Reading		03				
4		07	Adult Ed		07				
5		08	Special designated subjects		08				
6		11	Agriculture		11				
7		14	English		14				
8		15	Foreign language		15				

Aut Teaching Area Lookup Table

- **Credential Type** – the type of credentials the teacher has. The lookup table is under **K12.Staff**, and the table name is **Cred Type**.

Name: **Cred Type** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		01	Full credential		01				
☐	2		02	University internship		02				
☐	3		03	District internship		03				
☐	4		04	Pre-intern		04				
☐	5		05	Emergency permit		05				
☐	6		06	Waiver		06				
☐	7		07	Multiple subject		07				

Cred Type Lookup Table

- **ELL Aut Type** – the authorization by which the teacher is qualified to teach ELL. The lookup table is under **K12.Staff**, and the table name is **ELL Auth Type**.

Name: **Ell Auth Type** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		1	Authorized teacher		1				
☐	2		2	Teacher in training		2				
☐	3		3	Bilingual paraprofessional		3				

ELL Auth Type Lookup Table

- **Qual Method** – the method used to qualify the teacher to teach ELL. The lookup table is under **K12.Staff**, and the table name is **Qual Method**.

Name: **Qual Method** Namespace: **K12.Staff** Locked: **N**

☐ Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

X	Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status Year Start	Status Year End
☐	1		H	Yes, using HOUSSE		H				
☐	2		N	No		N				
☐	3		Y	Yes, other than HOUSSE		Y				

Qual Method Lookup Table

- **Job Class** – the job classification for the staff. In some states, this is a state-mandated value. The lookup table is under **K12.Staff**, and the table name is **Job Class**. This lookup table is also used on the **General** tab and the **Schools** tab of the **Staff** screen.

Name: **Job Class** Namespace: **K12.Staff** Locked: **N**

Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code

Lookup Values Add

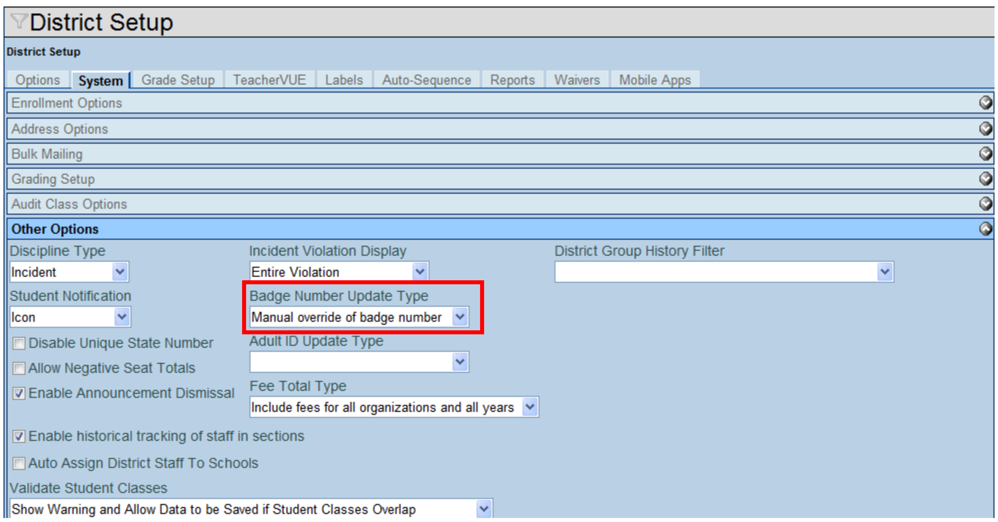
Line	ListOrder	Code	Description	Other SIS	State Code	Alt Code 3	Alt Code SIF	Status: Year Start	Status: Year End
1		10	Administrator (K12)		10				
2		11	Pupil service (K12)		11				
3		12	Teacher (K12)		12				
4		15	Administrator (Adult Ed)		15				
5		16	Pupil service (Adult Ed)		16				
6		17	Teacher (Adult Ed)		17				
7		19	Clerical		19				
8		23	Paraprofessional		23				
9		24	Other classified staff		24				

Job Class Lookup Table

- **Organization** – the school or district for which the teacher works. This lookup shows the organizations added through the **Organization** screen.

In addition to configuring the lookup tables, the method by which the badge number for each staff is created needs to be configured. This is done on the **System** tab of the **District Setup** screen, in the **Badge Number Update Type** list.

- **Synergy SIS Update of Badge Number** sets Synergy SIS to automatically add a badge number. Before choosing this option, be sure that no badge numbers have been added, or adjust the starting number to use on the **Auto-Sequence** tab of the **District Setup** screen. This is particularly critical if staff were added by converting them from a previous student information system.
- **Manual Update of Badge Number** leaves the badge number field blank until data is entered in the field.
- **Manual Override of Badge Number** lets Synergy SIS automatically add a badge number, but it can be manually changed.

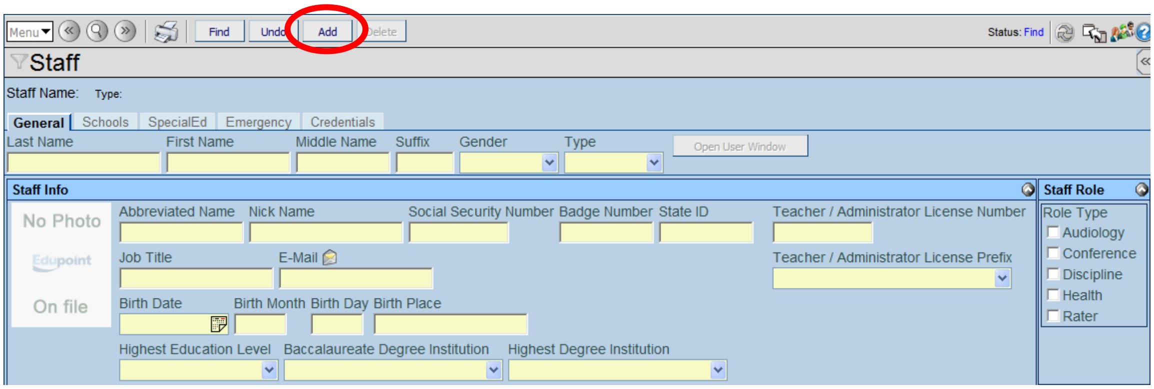


District Setup Screen, System Tab

ADDING NEW STAFF

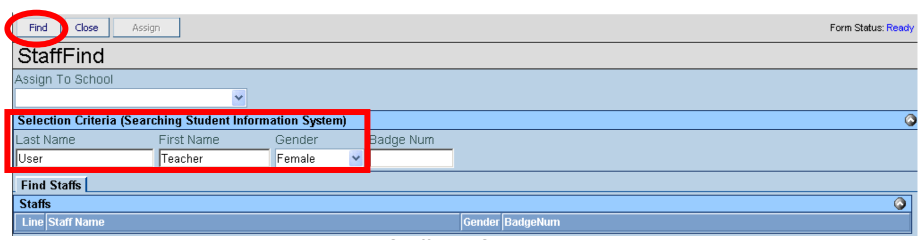
To add new staff to Synergy SIS:

1. On **Synergy SIS > Staff > Staff**, click the **Add** button at the top of the screen. The **StaffFind** screen opens.



Staff Screen

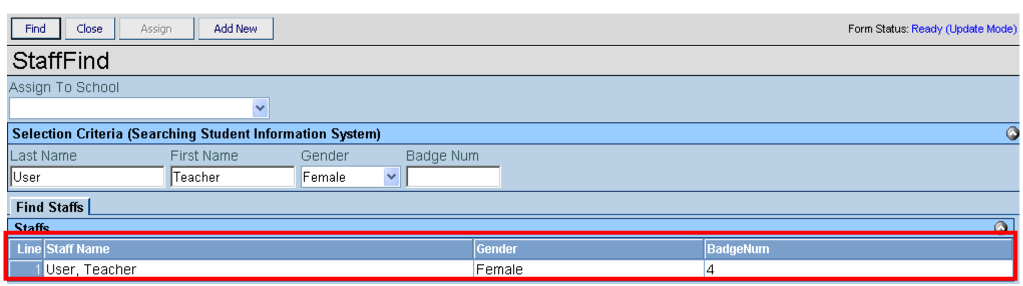
2. To avoid creating a duplicate record, search to see whether the staff member is already in the system. Enter the **Last Name**, **First Name**, and **Gender**, and click the **Find** button at the top of the screen.



StaffFind Screen

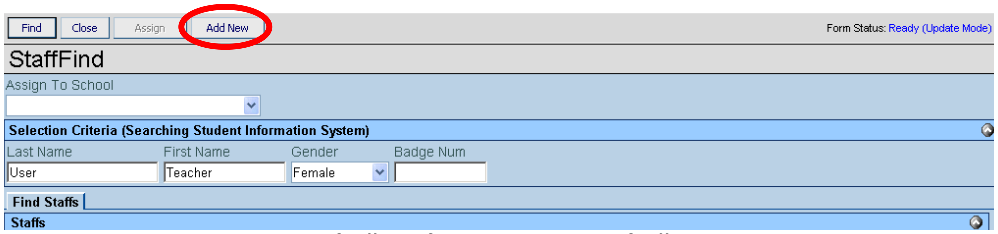
If matching staff members are found, they are listed in the **Find Staffs** section.

This function can also be used to add staff to new schools and new school years, or to assign staff members who have been converted from a previous SIS system. For more information about the assignment function, see the section in this chapter on Assigning Existing Staff to Schools.



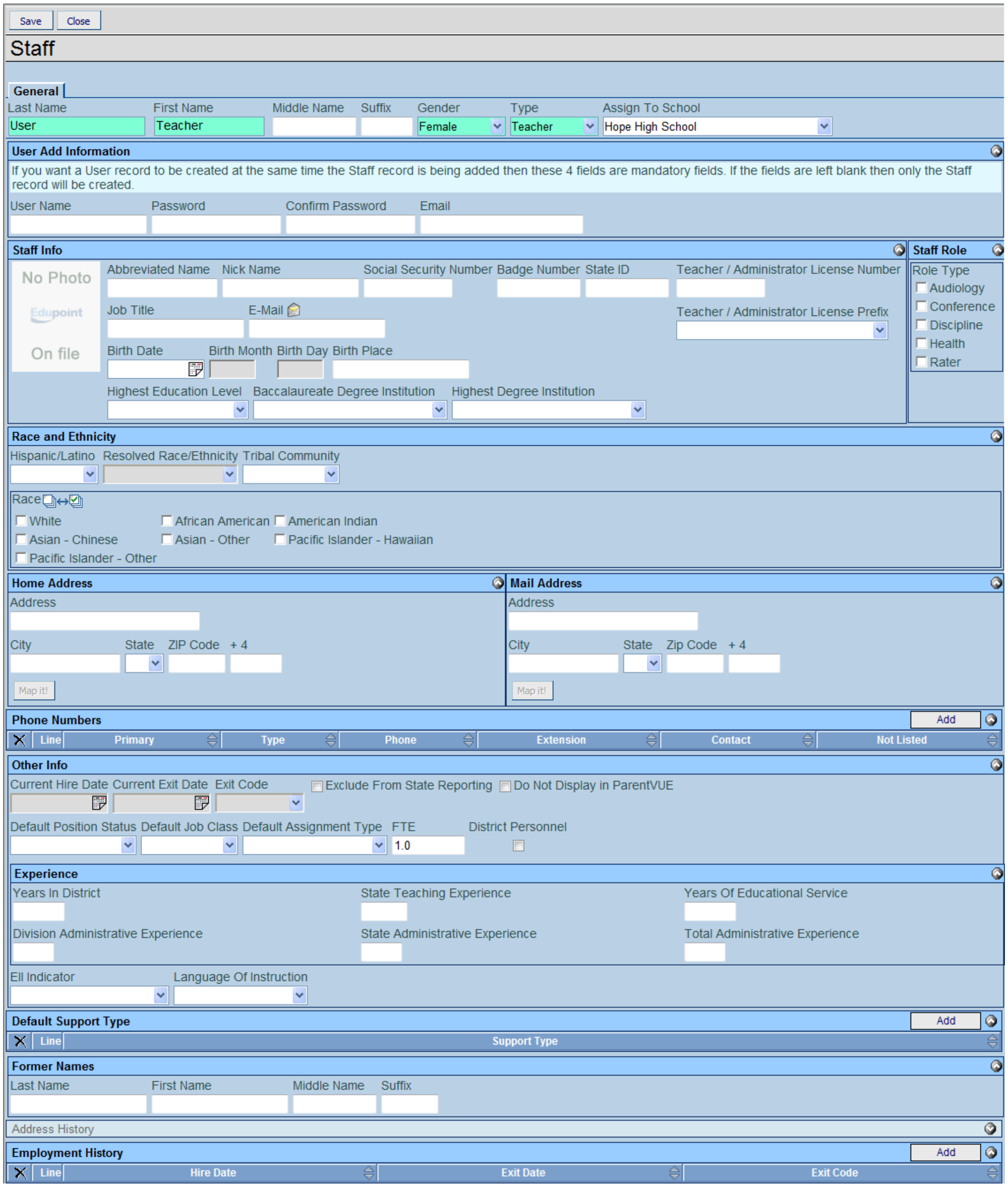
Staff Find Results

3. If the staff member is not found, click the **Add New** button.



StaffFind Screen, Adding New Staff

The new **Staff** screen opens, with the information entered as criteria in the **StaffFind** screen already entered. The fields highlighted in green are mandatory. To create not just a new staff record but also a new Synergy SIS user record, the fields in the **User Add Information** section are mandatory.



Staff Screen, Adding

4. Complete the staff record. The appropriate content for many fields — birth date, home address, and so on — is clear. The following might need some explanation.

   - **Type** is a district-specific lookup that can indicate the category of staff.
   - **Assign to School** is not needed if focused to a school, as the staff will be assigned to that school. If focused tot the district, either select a school or assign this person to the district by checking the **District Personnel** box in the **Other Info** section.
   - **Abbreviated Name** is a shortened name used in some reports.

- **Nick Name** – a name that the staff member commonly goes by.
- **Badge Number** must be unique for each staff member and might be generated by Synergy SIS, depending on the configuration in the **District Setup** screen.
- **State ID** might be required by the state.
- **Teacher/Administrator License Number** and **Teacher/Administrator License Prefix** – license number and type.
- Values for **Highest Education Level** can be customized at the district level.
- Selecting a **Role Type** in the **Staff Role** section adds the person's name to the lists in some screens. For example, if the **Conference** box is checked, the staff member appears in the **Staff Name** list in the **Student Conference** screen.
- To enter the staff member's ethnicity, first select if they are **Hispanic/Latino** and then check boxes for **Race**. Select a nation in the **Tribal Community** list if appropriate.
- To add a phone number**,** click the **Add** button in the **Phone Numbers** section. A new blank line is then displayed. Check the box in the **Primary** column to indicate the primary phone. Select the **Type** of phone number, and enter the number in the **Phone** column. If the phone number can be used to contact the staff, check the **Contact** box. If the phone number is not listed in the phone directory, check the **Not Listed** box.
- **Default Position Status**, **Default Job Class**, and **Default Assignment Type** values are district-specific.
- The **FTE**, or full-time equivalent, value is the time the person is scheduled to work.
- **Exclude From State Reporting** omits the staff member from state reporting. This might be appropriate in the case of a student teacher, for example.
- The **District Personnel** box indicates that the staff member is assigned to the district and does not have a school-specific designation.
- **Years in District** and **Years in Educational Service** can be updated annually for all staff on the **District Setup** screen, as described later in this chapter.
- **ELL Indicator** is for staff members eligible to teach in an English language learner program.
- Click the **Add** button in the **Default Support Type** section to indicate a default support type for staff members in a support/administrative role. These values are specified at the district level.
- **Address History** lists previous addresses if that option is enabled for the district.
- Click the **Add** button in the **Employment History** section to record historical employment data for the new staff member.

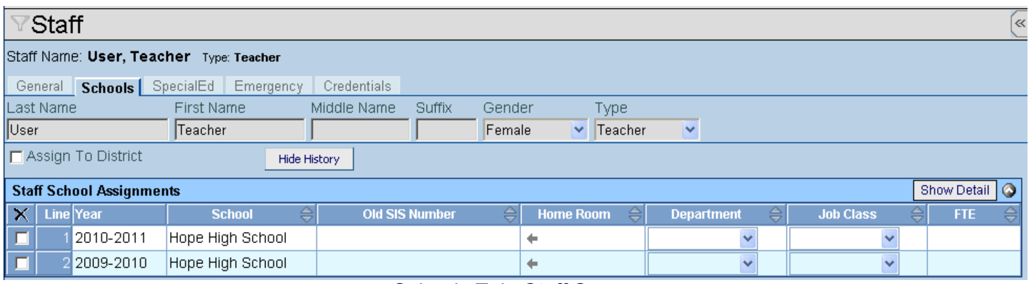
5. Once all data for the staff member has been entered, click the **Save** button at the top of the screen.

Once the staff record has been created, you can add more information on the other tabs of the **Staff** screen.

On the **Schools** tab are the school assignments. School assignments simply make the staff member available to be added to various school-related records in Synergy SIS. For example, a staff member assigned to a given school can be assigned as the teacher of a course at that school in the **District Course** screen. School assignments do not control the staff member's access to Synergy SIS; that is controlled by the user account and the security rights assigned to that account.

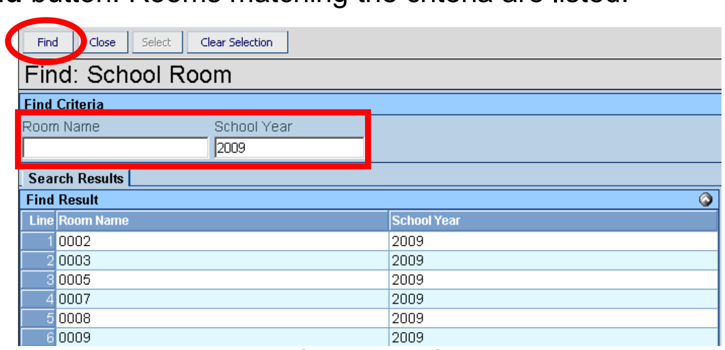
To view and modify school assignment information:

1. Click the **Schools** tab of the **Staff** screen.



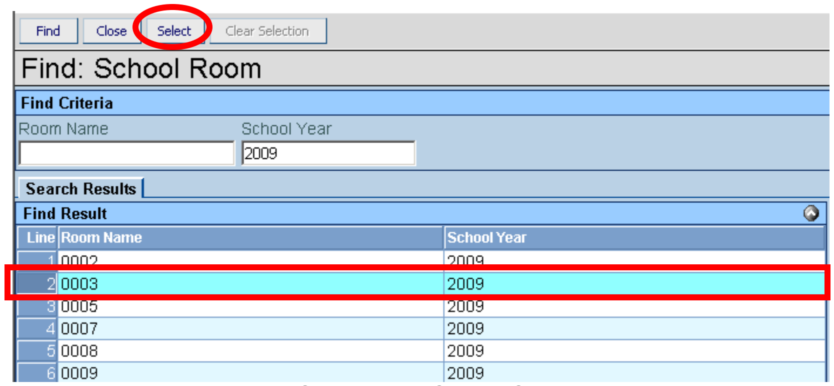
Schools Tab, Staff Screen

2. To assign the staff to the district, check the **Assign to District** box. Staff members assigned to the district can be assigned roles in any school in the district, regardless of the school assignments listed.
3. To show the complete history of the staff member's assignments, click the **Show Detail** button in the **Staff School Assignments** section.
4. To remove a school assignment from the staff, click in the box in the **X** column next to the correct year and school and click the **Save** button at the top of the screen. To add an assignment, follow the instructions in the following section in this chapter, Assigning Existing Staff to Schools.
5. To assign a homeroom, click the gray arrow in the **Home Room** column. The **Find: School Room** screen opens. Enter the **Room Name** or **Year** to search for, and click the **Find** button. Rooms matching the criteria are listed.



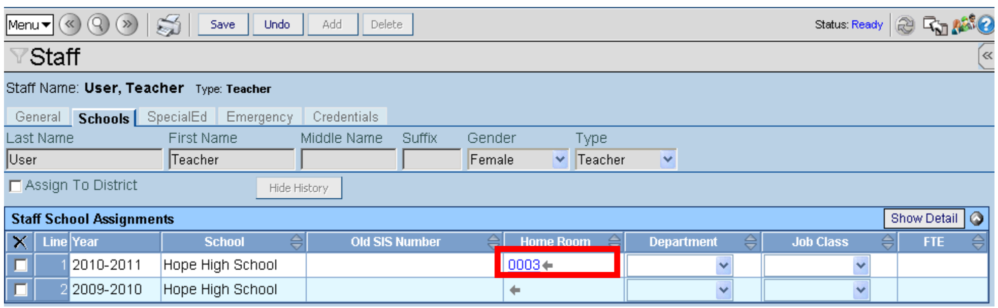
Find: School Room Screen

6. Click the room to use as the homeroom, and click the **Select** button.



Find: School Room Screen, Selecting

The room name is displayed in the **Home Room** column.



Schools Tab, Staff Screen, Saving Home Room

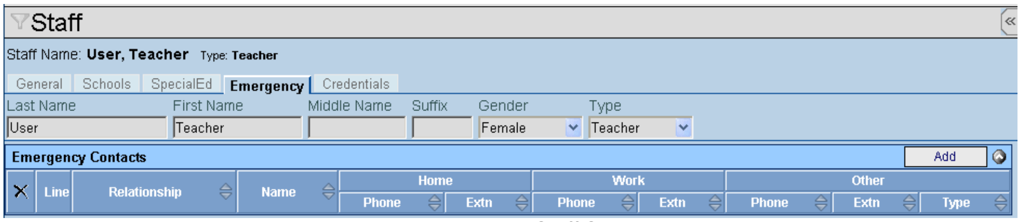
7. Assign the staff member to a **Department** and **Job Class** for each school assignment, if desired.
8. Enter the **FTE**, or full-time equivalent, value of the time the staff is scheduled to work at each school.
9. Click the **Save** button at the top of the screen.

Students are assigned to homerooms in bulk using the Update Home Room function in the School Setup screen.

The **SpecialEd** tab specifies the role the staff plays in special education services. The information on this tab is used for integration with the Synergy SE special education software. The **Roles** listed are set up in the **Role** screen, found under **Synergy SE > System > Special Education**. See the *Synergy SE – System Administrator Guide* for more information about this tab.

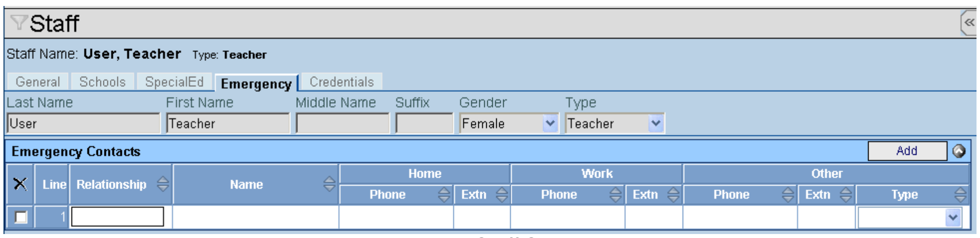
The **Emergency** tab tracks the people to contact if an emergency occurs involving the staff member. To add an emergency contact:

1. Click the **Emergency** tab of the **Staff** screen, and click the **Add** button in the **Emergency Contacts** section. A new blank line appears in the grid.



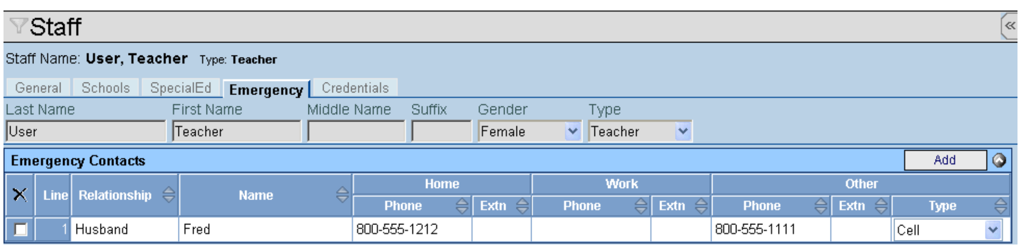
Emergency Tab, Staff Screen

2. In the **Relationship** column, enter the relationship to the staff member, such as mother or husband.



Emergency Tab, Staff Screen, Adding

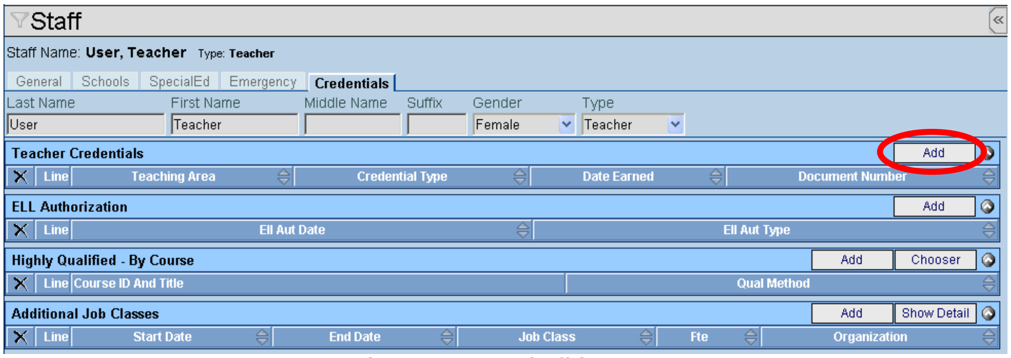
3. Enter the **Name** of the contact, and enter the **Phone** numbers in the appropriate sections. For the **Other** section, indicate the **Type** of phone.
4. Click the **Save** button at the top of the screen.



FSaving the Emergency Contact information

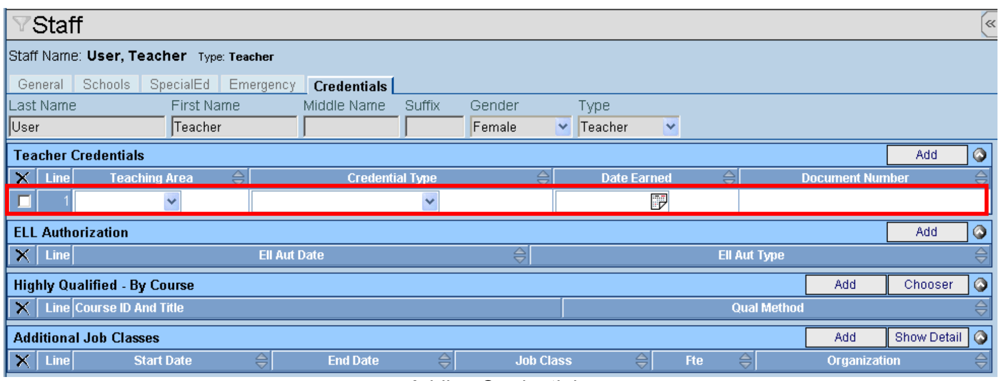
The **Credentials** tab can record teaching credentials and other qualifications. To record this information:

1. Click the **Credentials** tab of the **Staff** screen.
2. To add teacher credentials, click the **Add** button in the **Teacher Credentials** section. A new blank line appears in the section.



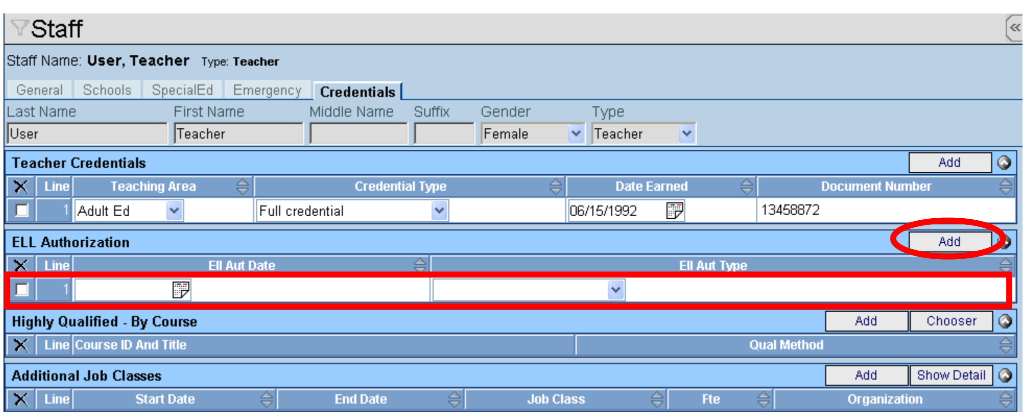
Credentials Tab, Staff Screen

3. Select the teacher's assigned **Teaching Area** and **Credential Type**, and enter the date of the credential in the **Date Earned** column. Record the certification number in the **Document Number** column.



Adding Credentials

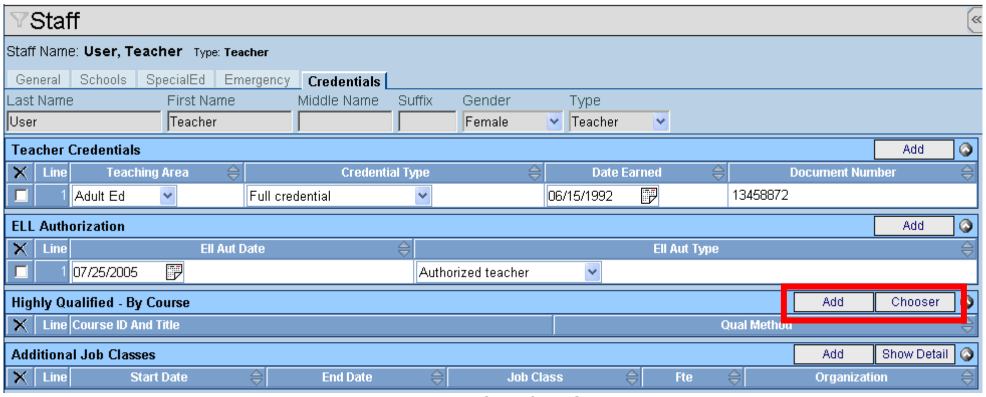
4. To add an ELL authorization, click the **Add** button in the **ELL Authorization** section. A new blank line appears in the section.



Adding an ELL Authorization

5. Enter the date of the authorization in the **ELL Aut Date** column, and select the type of authorization in the **ELL Aut Type** list.

6. To add a course for which the teacher is highly qualified to the **Highly Qualified – By Course** section, use the **Add** button for a single course or the **Chooser** button for one or more courses.

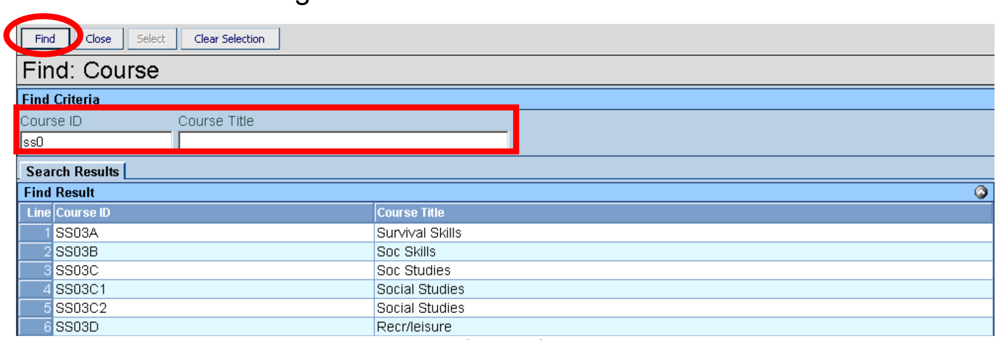


Adding Highly Qualified Courses

7. To add a single course:

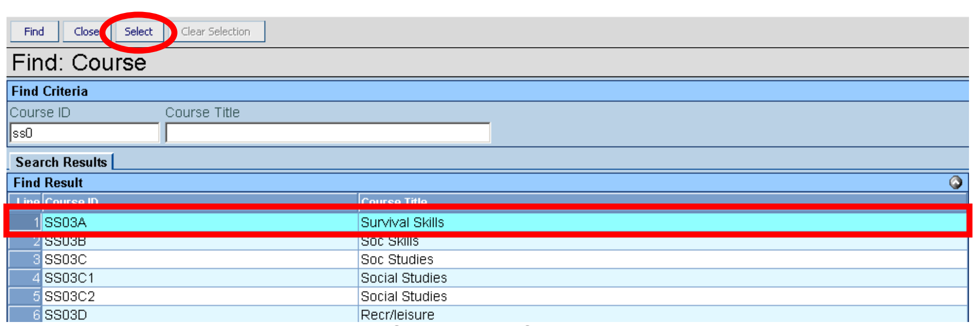
   a. Click the **Add** button. The **Find: Course** screen opens.

   b. Enter all or part of the **Course ID** and/or **Course Title** and click the **Find** button at the top of the screen. Courses that match the criteria are listed in the **Find Result** grid.



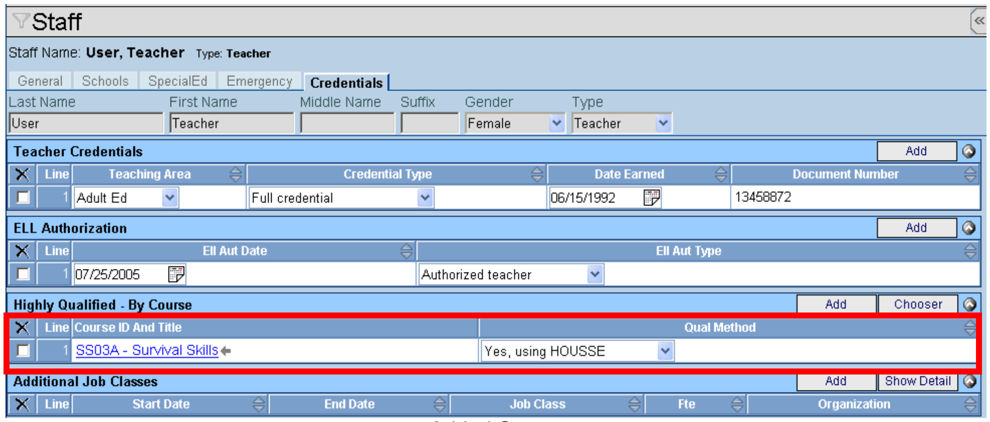
Find Course Screen

   c. To select the course to add, click it in the **Find Result** grid and click the **Select** button.



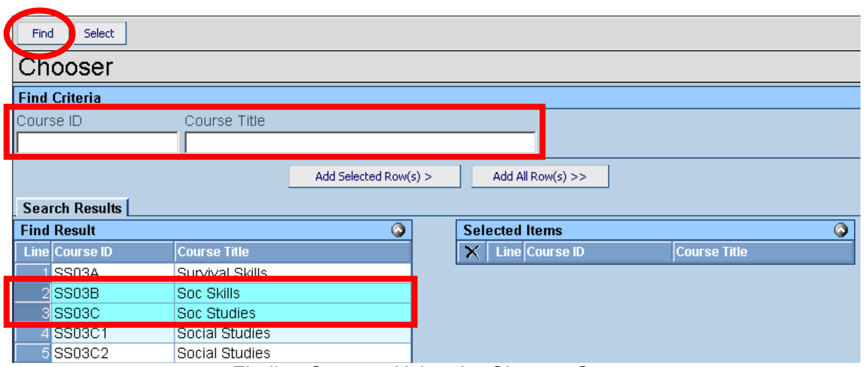
Selecting the Course

   d. In the **Highly Qualified – By Course** grid, select the qualifying method used to certify the teacher in the **Qual Method** column.



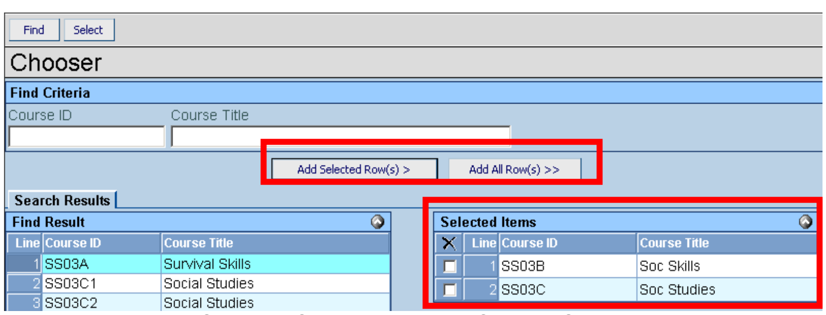
Added Course

8. To add multiple courses at once:
   a. Click the **Chooser** button. The **Chooser** screen opens.
   b. Enter all or part of the **Course ID** and/or **Course Title** and click the **Find** button at the top of the screen. Courses that match the criteria are listed in the **Find Result** grid.



Finding Courses Using the Chooser Screen

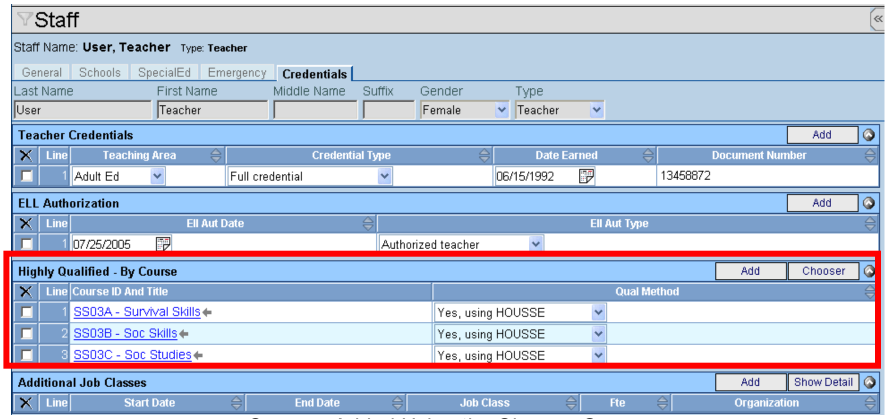
   c. Click the **Line** number of the row containing the desired course, or Ctrl-click multiple **Line** numbers, and click the **Add Selected Rows** button. Or to add all courses listed, click the **Add All Row(s)** button.



Selecting Courses Using the Chooser Screen

   d. Click the **Select** button at the top of the screen.

e. In the **Highly Qualified – By Course** grid, select the qualifying method used to certify the teacher in the **Qual Method** column.

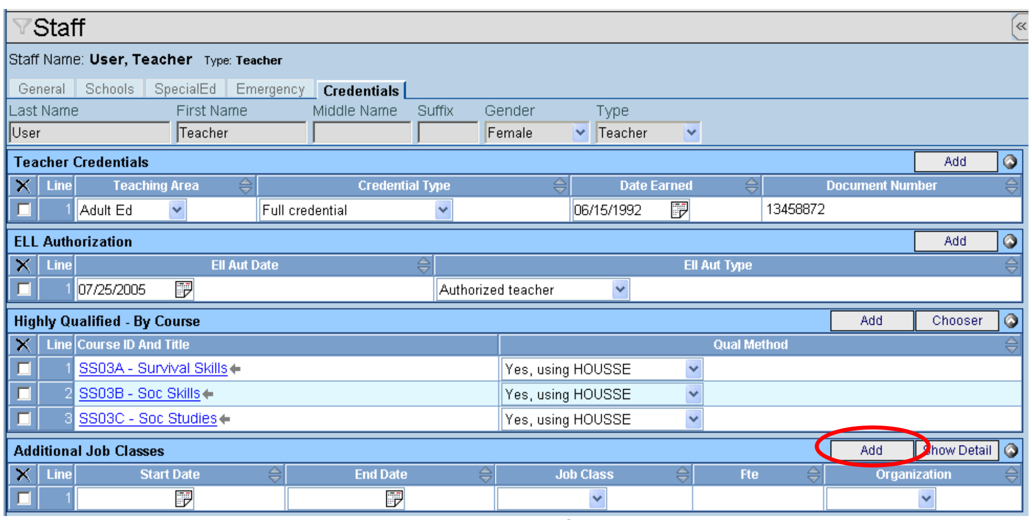


Courses Added Using the Chooser Screen

9. To add a job class for a staff member, click the **Add** button in the **Additional Job Classes** section.

   (This is in addition to any **Default Job Class** selected on the **General** tab.)

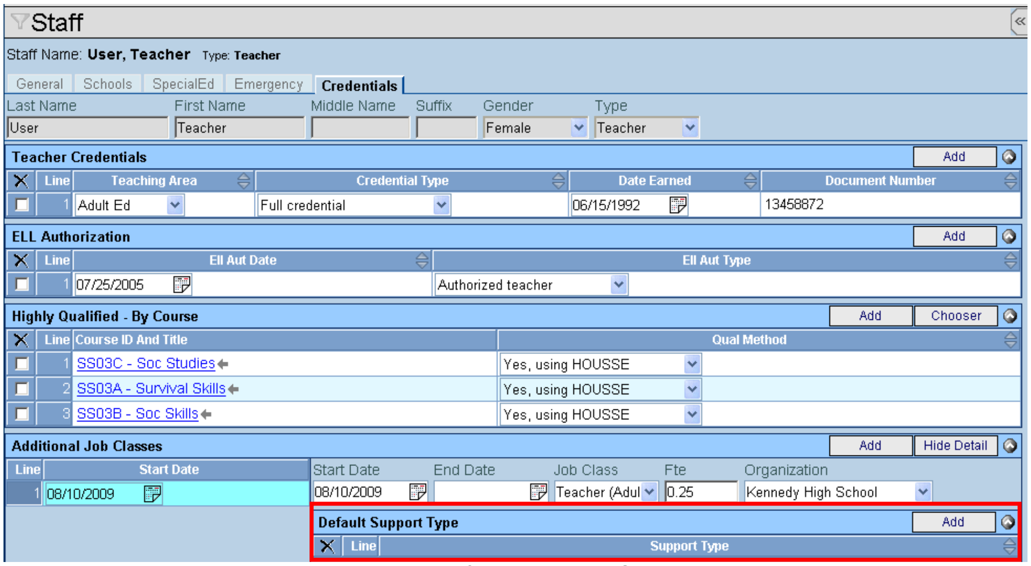
   A new blank line appears in the section.



Additional Job Class

10. Enter the beginning date for the job class in the **Start Date** column, and an **End Date** if needed. Select the **Job Class**. Enter a number in the **Fte** column to indicate the amount of time assigned to the job class, and select the **Organization** to which the job class applies.
11. Click the **Save** button at the top of the screen.
12. If the job class is a support position, click the **Show Detail** button. The detail for the selected job class appears on the right side of the screen. To select a different class, click the **Line** number on the left.

13. Click the **Add** button in the **Default Support Type** section, and select the **Support Type**.



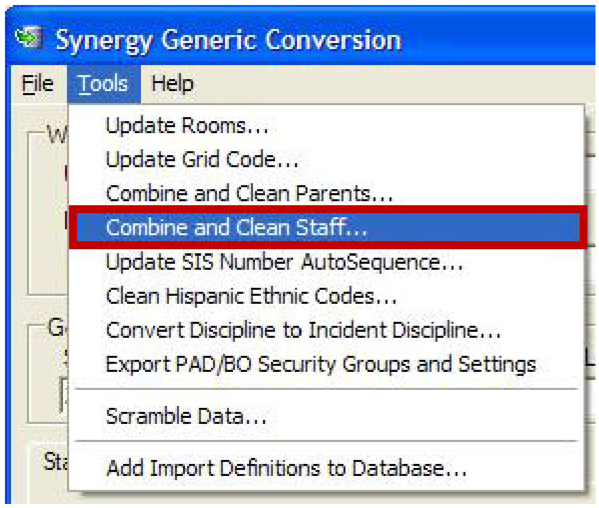
Detail View of Additional Job Classes

14. Click the **Save** button at the top of the screen

COMBINING AND CLEANING STAFF RECORDS

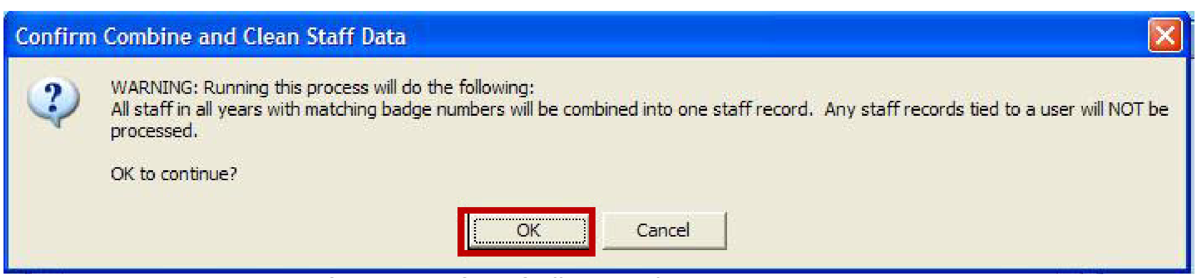
If you have access to the Synergy Generic Conversion Tool, you can use it to find duplicate staff records. When running this process, all staff members in all years with matching badge numbers are combined into one staff record.

1. Open the Synergy Generic Conversion tool.
2. On the Tools menu, click **Combine and Clean Staff**.



Synergy Generic Conversion Tool, Tools menu

3. A confirmation screen appears.



Combine and Clean Staff Data confirmation message

4. Click **OK**. The process combines ALL years and ALL School Assignments for ALL Staff records with identical badge numbers. If there is a matching Staff record that is associated with a User record, the merge process is halted.

ASSIGNING EXISTING STAFF TO SCHOOLS

As part of the new year rollover process, staff can be assigned to the same school for the new year. Staff imported during a conversion from a previous student information system may also need to have their assignments edited.

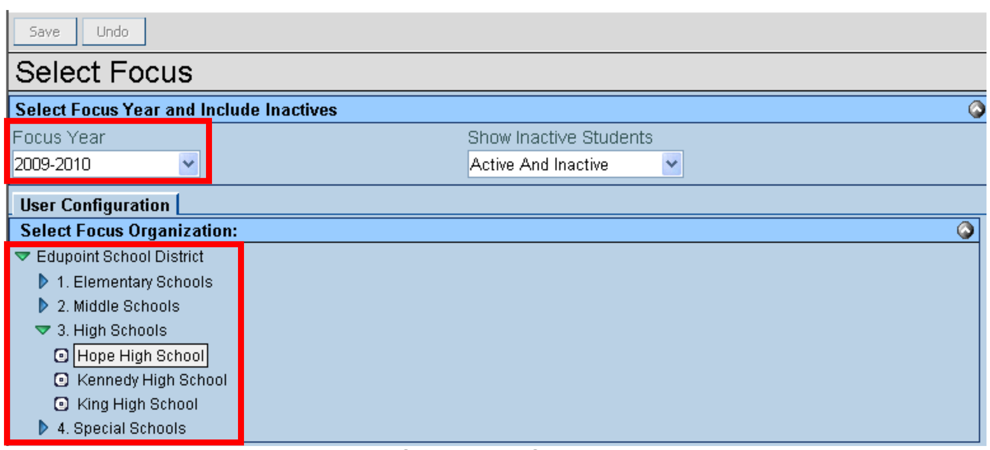
To edit these assignments manually or change an existing assignment, first change the focus to the school or district level. At the district level, any school can be assigned. When focused at a school, staff can be added to that school only. **The year to be added must also be the selected focus**.

To change the focus:

1. Click in the top right corner, where the focus is displayed. The **Select Focus** screen opens.

Focus

2. Use the tree in the **Select Focus Organization** section to select the school or district. Use the **Focus Year** list to select the year.

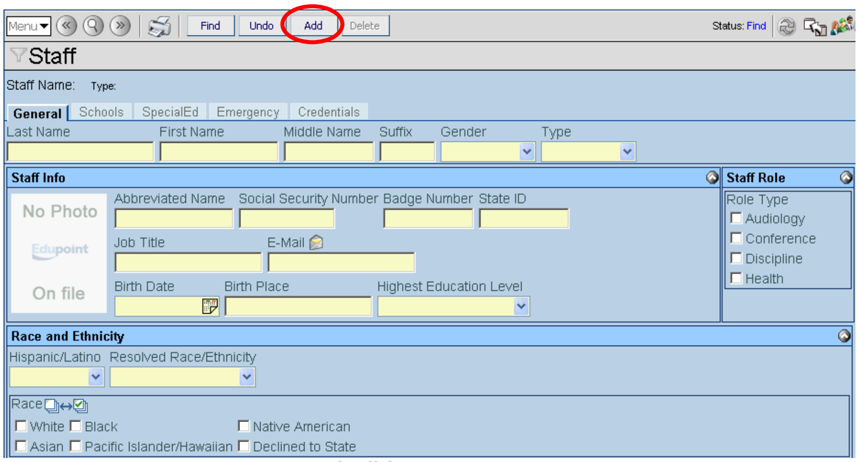


Select Focus Screen

3. Click the **Save** button

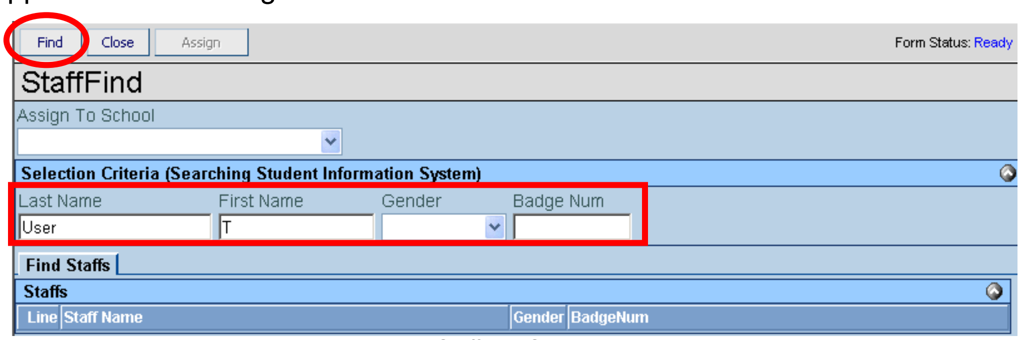
To change a staff assignment to a school:

1. On the **Staff** screen, click the **Add** button. The **StaffFind** screen opens.



Staff Screen, Adding

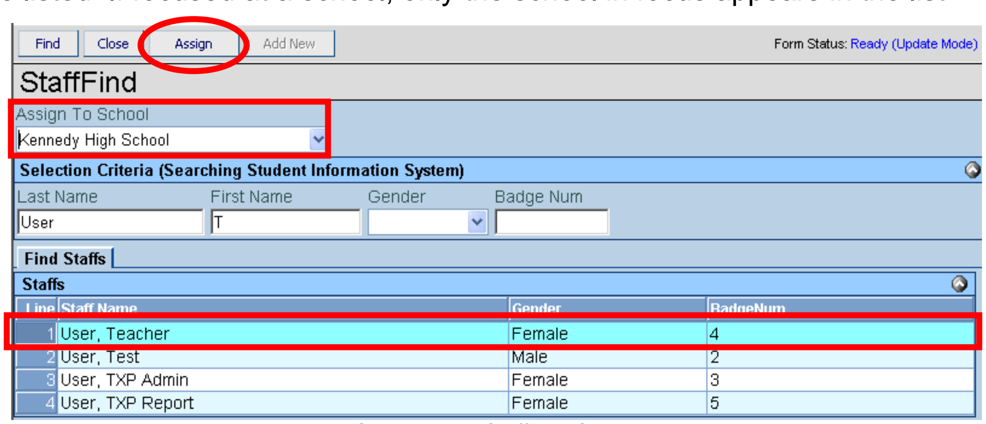
2. Enter all or part of the staff member's name in the **Last Name** and/or **First Name** boxes, and click the **Find** button. The staff members that match the search criteria appear in the **Staffs** grid.



StaffFind Screen

3. Click the name of the staff member.

4. In the **Assign to School** list, click the school. If focused at the district, all schools are listed. If focused at a school, only the school in focus appears in the list.



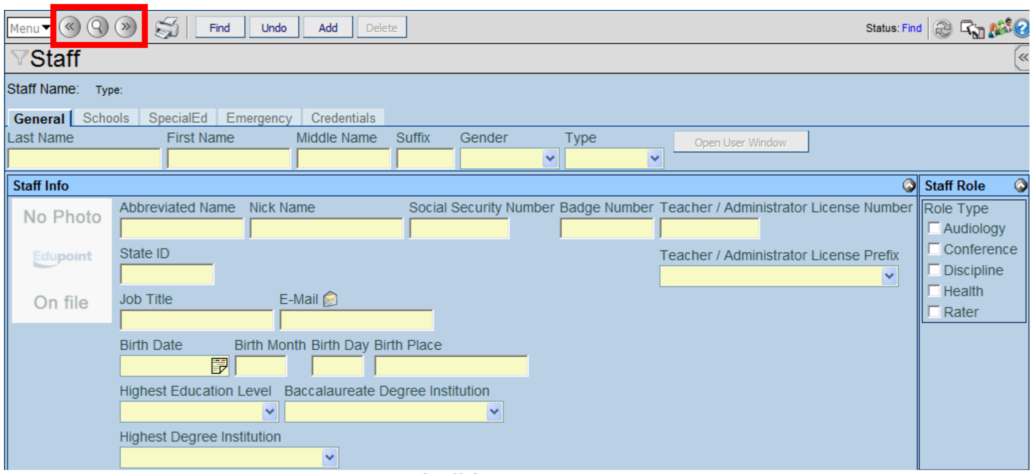
Selecting the Staff and School

5. Click the **Assign** button to assign the staff member to that school.

EDITING STAFF DATA

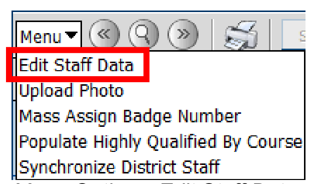
To edit a staff record:

1. On the **Staff** screen, scroll or use Find mode to locate the staff record.

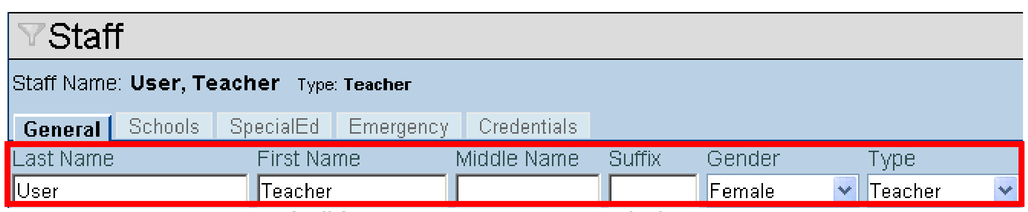


Staff Screen, Finding

You can edit any data on any tab, as described in the Adding New Staff section in this chapter, except the top row. To edit the top row, click the **Menu** button and select **Edit Staff Data**.



Menu Options, Edit Staff Data



Staff Screen, Editing the Top Row of Information

2. After any changes, click the **Save** button at the top of the screen.

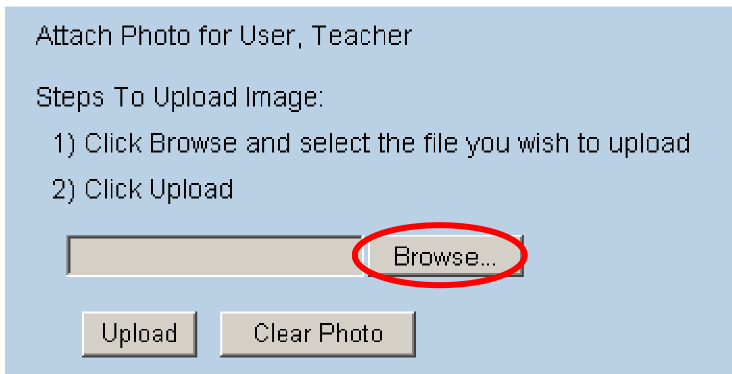
Staff photo files should be 100 pixels wide by 125 pixels high, or that ratio. Both .png and .jpg files are supported.

To add a photo or replace an existing photo:

1. Click the **Menu** button and click **Upload Photo**. The **Attach Photo** window opens.

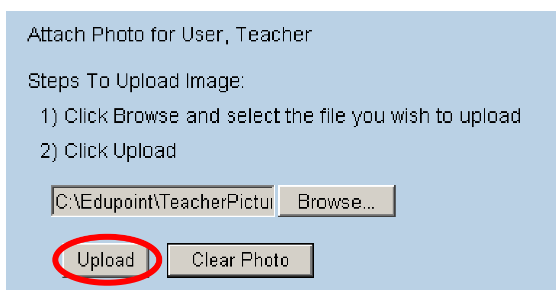
Menu Options, Upload Photo

2. Click the **Browse** button to find and select the photo.



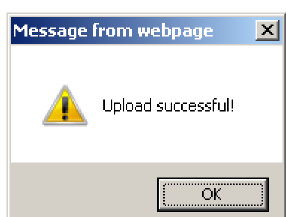
Attach Photo Screen

3. Click the **Upload** button.



Attach Photo Screen, Uploading

4. When the "Upload successful!" message appears, click the **OK** button.



Message Box

The photo appears.

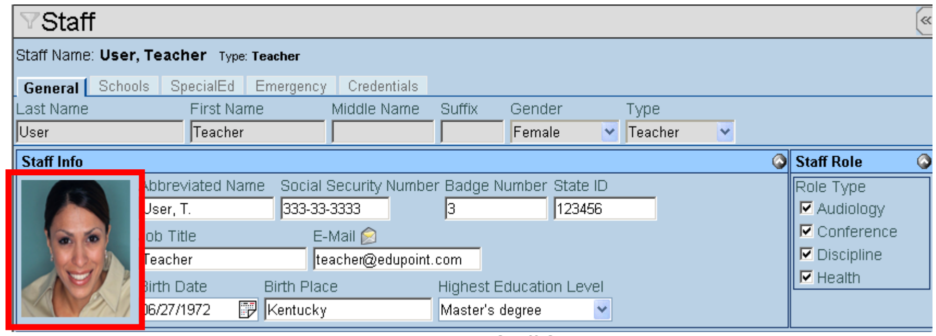
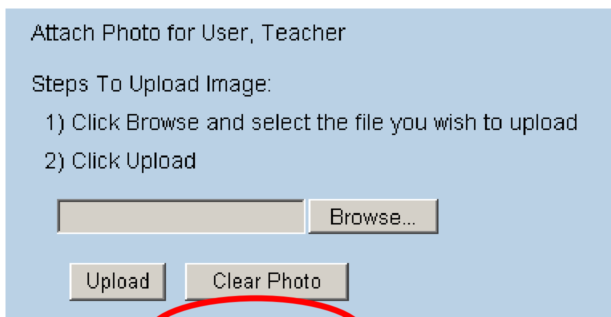


Photo Attached, Staff Screen

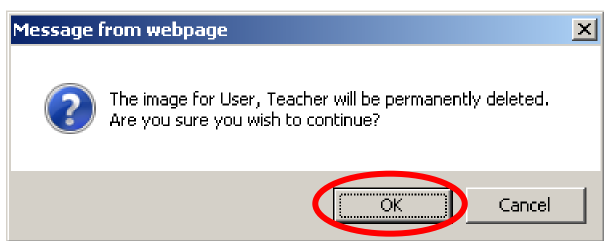
To remove a photo from a staff record:

1. Click the **Menu** button and click **Attach Photo**.
2. In the **Attach Photo** box, click the **Clear Photo** button.



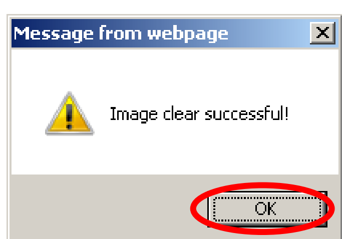
Attach Photo Screen, Removing Photos

3. In the confirmation message box, click the **OK** button.



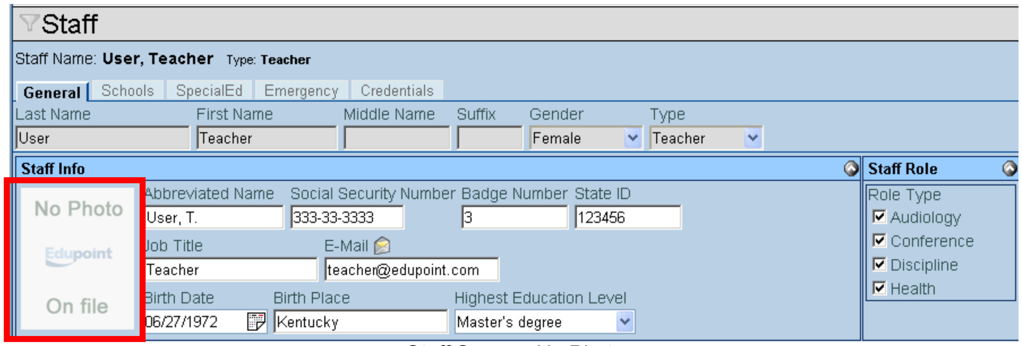
Deletion Confirmation Message Box

4. In the “Image clear successful!” message box, click the **OK** button.



Message Box

The photo is removed and the photo area shows “No Photo On File.”



Staff Screen, No Photo

To assign badge numbers or reassign badge numbers to all staff:

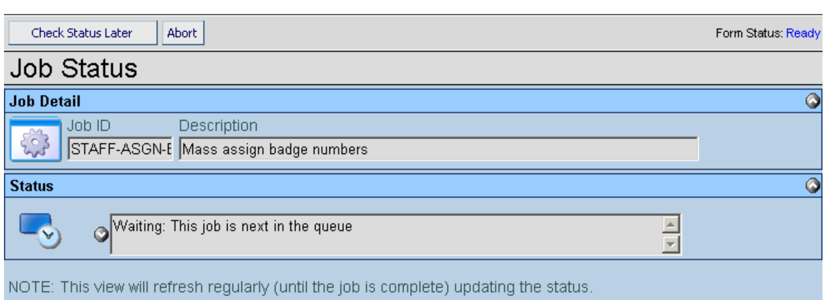
1. Click the **Menu** button and click **Mass Assign Badge Number**.

Menu Options, Upload Photo

2. In the **Update Badge Type** list, select one of the following:
    - **Reassign all badge numbers** – assigns every staff member a new number. Numbering starts at the number set on the **Auto-Sequence** tab of the **District Setup** screen, and assigns numbers to staff members in alphabetical order by last name. If no Auto-Sequence number is set, numbering starts with 1.
    - **Only assign badge numbers to staff who currently do not have a badge number** – assigns badge numbers to those staff members who don’t have them. Numbering starts at the number set on the **Auto-Sequence** tab of the **District Setup** screen, and assigns numbers to staff members in alphabetical order by last name. If no Auto-Sequence number is set, numbering starts with 1.

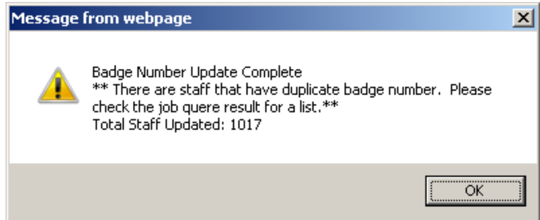
Mass Assign Badge Numbers Screen

3. Click the **Mass Assign Badge Numbers** button. The **Job Status** screen opens, and displays the progress of the assignments.



Job Status Screen

When the process is complete, a message box reports the results of the update. If any numbers are duplicated, a warning message is displayed.

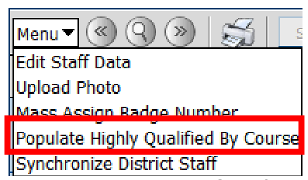


Message Box

4. Click the **OK** button.

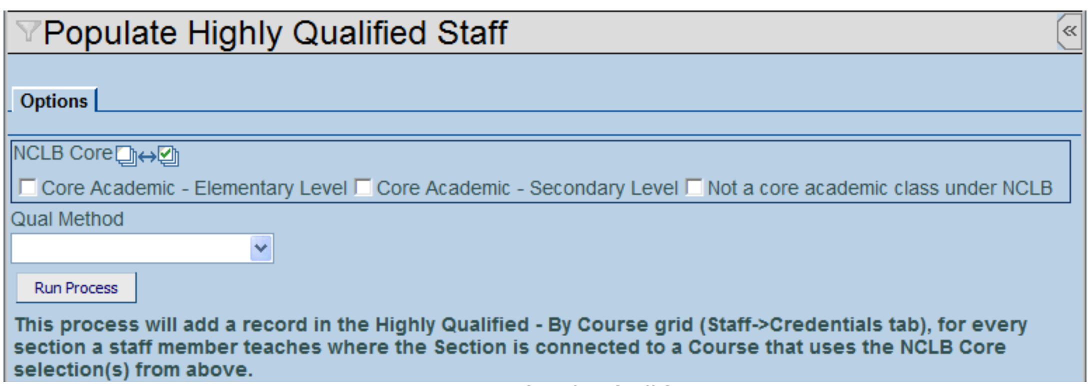
To add Highly Qualified records to each staff member based on the current courses they teach:

1. Click the **Menu** button and click **Populate Highly Qualified By Course**. The **Populate Highly Qualified Staff** screen opens.



Menu Options, Populate Highly Qualified By Course

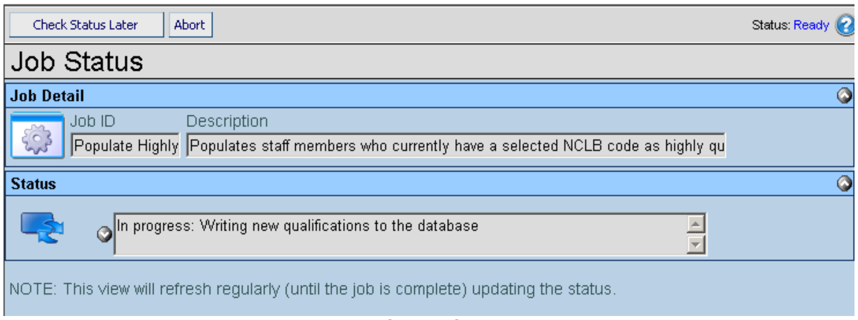
2. Check the **NCLB Core** values assigned to the courses that count as highly qualified. To check or uncheck all values, use the button.



Populate Highly Qualified Staff Screen

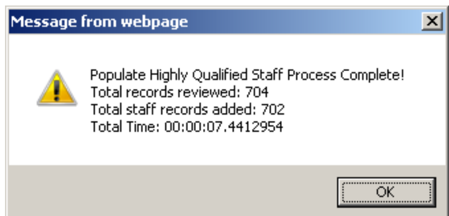
3. In the **Qual Method** list, select the qualifying method to assign to the matching courses.

4. Click the **Run Process** button. The **Job Status** screen opens, and displays the progress of the assignments.



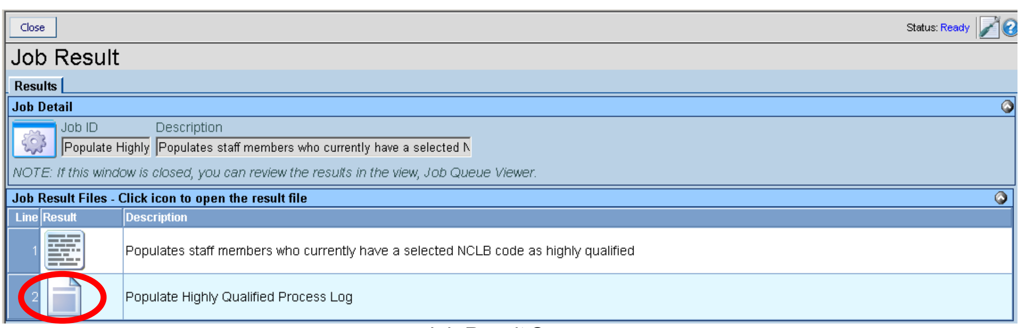
Job Status Screen

When the process is complete, a message box reports the results of the update.



Message Box

5. Click the **OK** button. The **Job Result** screen opens.
6. To see the records added, click the icon in the **Result** column for the **Populate Highly Qualified Process Log**.



Job Result Screen

The log opens, listing each staff and course that met the qualifications.

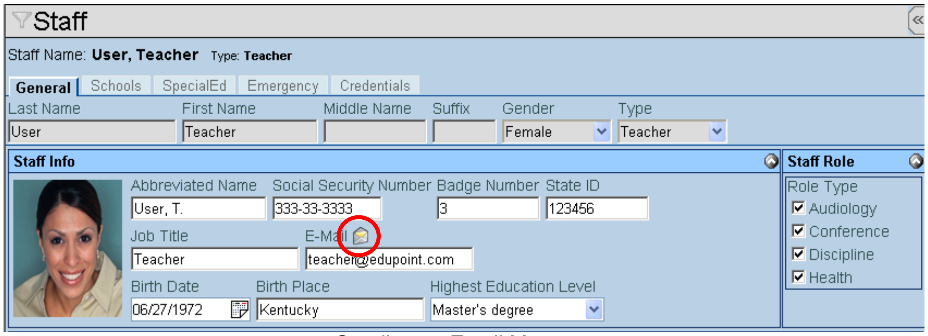
```
Populate Highly Qualified By Course - NCLB courses 1,2  Qual Method H

Result: Staff Name:     Course Title:   Course ID:
ADDED   Aderson, Gordon Ap Calc Bc      MA51W
ADDED   Aderson, Gordon Student Aid     SA99
ADDED   Aderson, Gordon Algebra II      MA402
ADDED   Aderson, Gordon Ap Calculus Bc  MA51W2
ADDED   Bayer M., Michelle      Math Standards  MA90
ADDED   Bayer M., Michelle      Algebra II      MA40
ADDED   Bayer M., Michelle      Geometry        MA30
ADDED   Bayer M., Michelle      Std Math I      MA902
ADDED   Bayer M., Michelle      Algebra II      MA402
ADDED   Bayer M., Michelle      Geometry        MA302
ADDED   Bayer M., Michelle      Student Aid     SA99
```

Populate Highly Qualified Process Log

To send a staff member an email message to the address listed on the **General** tab:

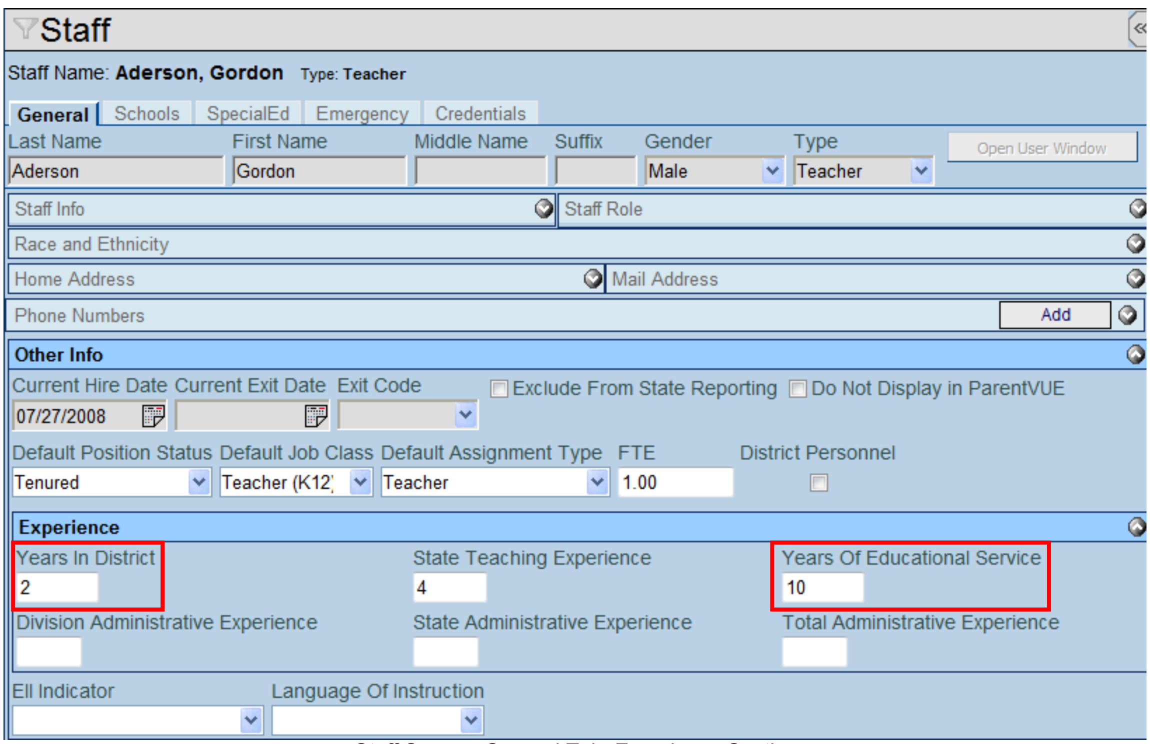
1. Click the envelope icon above the email address. A message window opens from the default email program on the computer.



Sending an Email Message

2. Complete and send the message as usual.

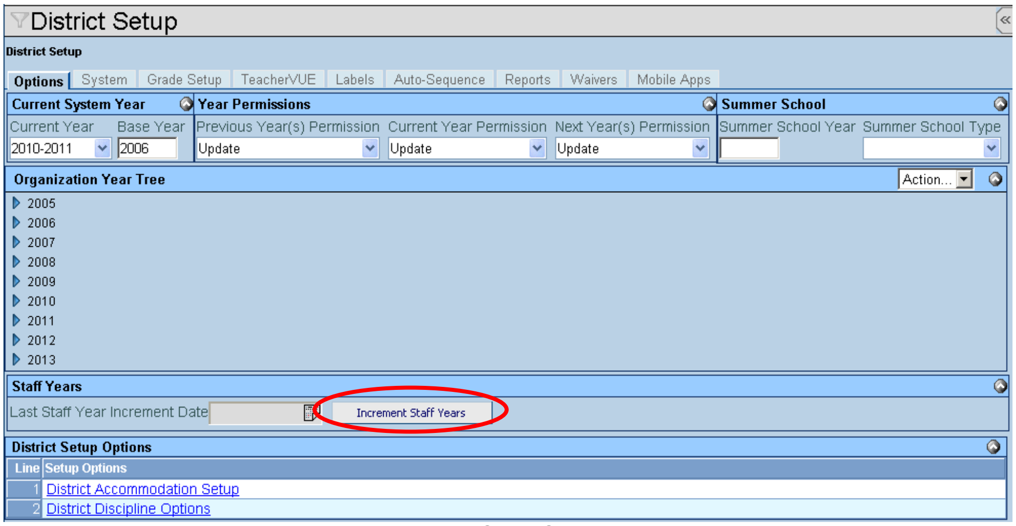
On the **General** tab, the staff member's number of years in the district and number of years in the education industry are displayed. These numbers should be updated annually for accuracy.



Staff Screen, General Tab, Experience Section

To update the years for all staff members:

1. Go to **Synergy SIS > System > Setup > District Setup**.
2. Near the bottom of the **Options** tab, in the **Staff Years** section, note the **Last Staff Year Increment Date**.



District Setup Screen

3. If this last increment date is a year or more ago, click the **Increment Staff Years** button to add 1 to all staff years.

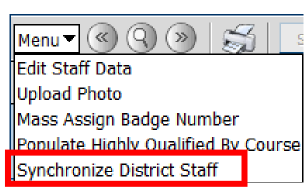
   This process updates **Years in District** and **Years of Educational Experience**, but not the other numbers in the **Experience** section of the **Staff** screen.

You can create staff school year records in bulk for staff members who are assigned to the district. To prepare bulk creation of staff school year records:

- In **Synergy SIS > System > Setup > District Setup**, on the **System** tab, select the **Auto Assign District Staff To Schools** check box.
- In **Synergy SIS > Staff > Staff**, on the **Schools** tab, and select the **Assign to District** check box for each staff member you want to assign automatically.

To create school year records:

1. Click the **Menu** button and click **Synchronize District Staff**. The **Populate Highly Qualified Staff** screen opens.



Menu Options, Synchronize District Staff

   The **Job Status** screen displays while the staff synchronize. When the process is complete, a message box reports the number of staff members assigned.

2. Click **OK**.

OVERVIEW OF USERS SETUP

Users are the people who can log in to Synergy SIS, either through the main Synergy SIS interface or the TeacherVUE interface. For specific instructions on how to set up users to use TeacherVUE, see the *Synergy SIS – TeacherVUE Administrator Guide*.

You can group users to make it easier to apply changes across multiple users at once. User groups are generally based around security rights. Almost all options that can be set for an individual user can also be configured for a user group.

Synergy SIS security rights move from most restrictive to least restrictive. If a user belongs to two groups with different settings on the same field, the user is granted the least restrictive access. For example, if one group has View rights but the other group has Update rights, the user has Update rights.

Before designing the district user groups, review the *Synergy SIS – Security Administrator Guide* to gain a thorough understanding of how security works in Synergy SIS. Setting up security rights and user groups can be extremely time-consuming, so it is best to plan diligently and avoid redoing the setup of groups.

Generally a district has three types of user groups. The three types are:

- **Organization**-based groups – these groups govern access to view or update the information of specific organizations in the district. An example of an organization-based group is a group that has Update access to a specific school.
- **Role**-based groups – these groups are based on the users' positions in the district. An example of a role-based group is a group for principals. These groups are helpful if each person generally has only one role in the district and the security rights for the roles do not change.
- **Security**-based groups – these groups are configured around the security rights assigned to the group. An example of a security-based group is a group that has the right to update student addresses.

Depending on the needs of the district, it may be necessary to group the settings into categories other than those recommended above. Before determining the exact groups, first decide which settings should be grouped. The following table outlines some possible groupings.

		Recommended Type of Group		
User Group Tab	**Settings**	**Organization**	**Role**	**Security**
Organizations	All	X		
Navigation Menu	All		X	
Options	All			X
Security	Discipline		X	X
	Conference		X	X
	Scheduling		X	X
	Other			X
	Special Ed		X	X
	Entry Times		X	X
POV	All		X	

In addition to mapping out where each tab of the user group is defined, the same type of mapping should be done for the security rights for each module of Synergy SIS. See the *Synergy SIS – Security Administrator Guide* for sample groupings and mappings.

Once it has been decided which settings will be grouped for which type of group, you define the actual user groups. When naming the groups, remember that they are sorted alphabetically, so it is helpful to create a naming scheme that keeps like groups together. Sample user group names include:

Organization-Based	Role-Based	Security-Based
Org – School Name – Update	Role – Principal	Sec – Discipline – Update
Org – School Name – View	Role – Secretary	Sec – Discipline – View
Org – District Name – Update	Role – District Administrator	Sec – Attendance – Update
Org – District Name – View	Role – Information Technology	Sec – Attendance – View
	Role – Nurse	Sec – Grades – Update
	Role – Office Clerk	Sec – Grades – View
	Role – Attendance Clerk	Sec – TXP – Admin
	Role – Teacher	Sec – TXP – User

Note – If there are settings that cannot easily be grouped, it is recommended not to include those settings in a user group. Those settings should be applied to individual users. Settings at the user level override the settings for a group.

Once the user groups have been defined, the last step is to determine what the actual settings should be for each user group. The worksheet on the next page is provided to assist the district in documenting the user group settings.

User Group Settings

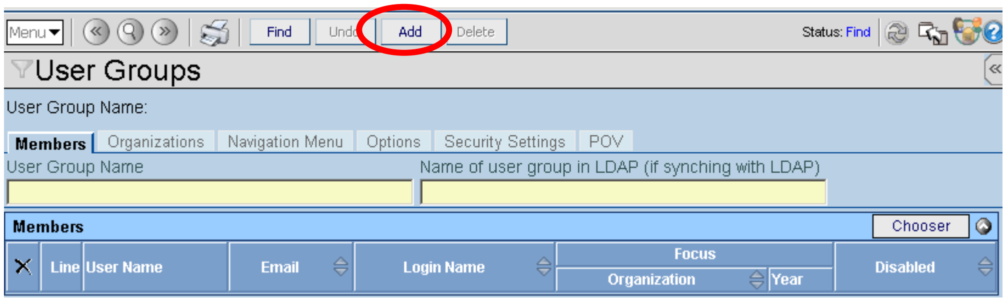
User Group	Organizations	Navigation Menu	Options	Security	POV
Org – District Name - Update	***Night*** *Y* ***Regular*** *Y* ***Summer*** *Y* ***Previous Year*** *Update* ***Current Year*** *Update* ***Next Year*** *Update* ***Non-Year*** *Update* *District* *Update*	***Report User:*** ***Navigation Menu:***	***POV Home Page:*** ***Login Page:*** ***Allow Dual Login***	***Discipline Sec*** ***Discipline Org Sec*** ***Conference*** ***Scheduling*** ***TXP Admin*** ***Student Team*** ***Case Manager*** ***Gradebook***	***Show Task List*** ***Health*** ***Student***
Role - Nurse	***Night*** ***Regular*** ***Summer*** ***Previous Year*** ***Current Year*** ***Next Year*** ***Non-Year***	***Report User:*** ***Navigation Menu:*** *Default* *Heath* *Health Log Other* *Health Screen* *Medications Monitor*	***POV Home Page:*** *Health* ***Login Page:*** ***Allow Dual Login***	***Discipline Sec*** *Current* ***Discipline Org Sec*** *Lowest* ***Conference*** *Lowest* ***Scheduling*** *N* ***TXP Admin*** *N* ***Student Team*** *Y* ***Case Manager*** *N* ***Gradebook***	***Show Task List*** *Yes* ***Health*** *Y* ***Student*** *Y*
	Night **Regular** **Summer** **Previous Year** **Current Year** **Next Year** **Non-Year**	**Report User:** **Navigation Menu:**	**POV Home Page:** **Login Page:** **Allow Dual Login**	**Discipline Sec** **Discipline Org Sec** **Conference** **Scheduling** **TXP Admin** **Student Team** **Case Manager** **Gradebook**	**Show Task List** **Health** **Student**
	Night **Regular** **Summer** **Previous Year** **Current Year** **Next Year** **Non-Year**	**Report User:** **Navigation Menu:**	**POV Home Page:** **Login Page:** **Allow Dual Login**	**Discipline Sec** **Discipline Org Sec** **Conference** **Scheduling** **TXP Admin** **Student Team** **Case Manager** **Gradebook**	**Show Task List** **Health** **Student**
	Night **Regular** **Summer** **Previous Year** **Current Year** **Next Year** **Non-Year**	**Report User:** **Navigation Menu:**	**POV Home Page:** **Login Page:** **Allow Dual Login**	**Discipline Sec** **Discipline Org Sec** **Conference** **Scheduling** **TXP Admin** **Student Team** **Case Manager** **Gradebook**	**Show Task List** **Health** **Student**

User Group	Organizations	Navigation Menu	Options	Security	POV
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student

ADDING USER GROUPS

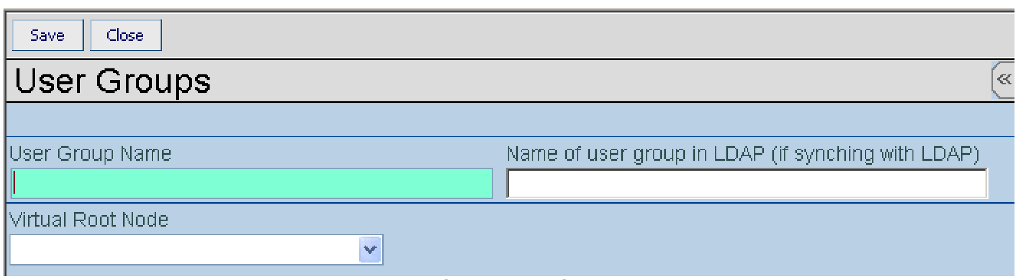
To create a user group:

1. Go to **Synergy SIS > System > User > User Groups**.



User Groups Screen

2. Click the **Add** button at the top of the screen. The new **User Groups** screen opens.
3. Enter the **User Group Name** and select the **Virtual Root Node** if needed. The virtual root node is the level of the organization, such as elementary schools, to which this group is added. By default, all groups are added to the top district level.



User Groups Add Screen

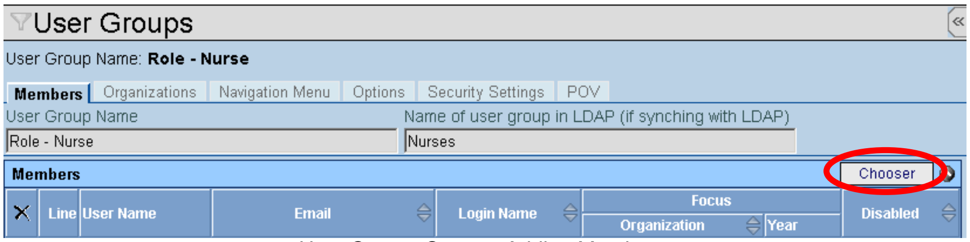
4. If using LDAP Authentication, you can map the group to a group in the LDAP directory by entering the **Name of user group in LDAP**. For more about LDAP integration, see Chapter Two of this guide.
5. Click the **Save** button at the top of the screen.

Members Tab

You can add and remove users on the **Members** tab, which is especially useful when adding multiple users to a group. Generally, a single user is added to a group through the **User Groups** tab on the **User** screen.

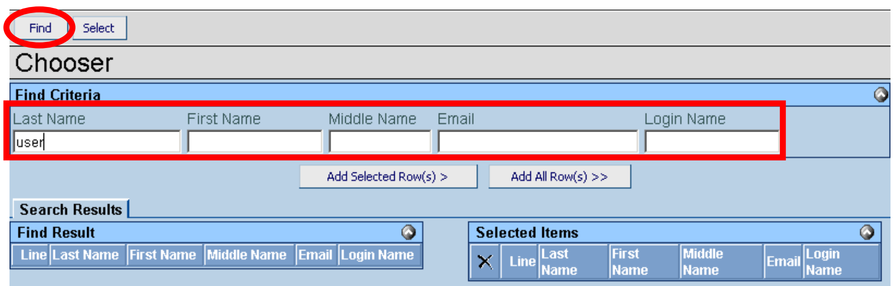
To add users to a group on the **User Groups** screen:

1. Click the **Chooser** button. The **Chooser** screen opens.



User Groups Screen, Adding Members

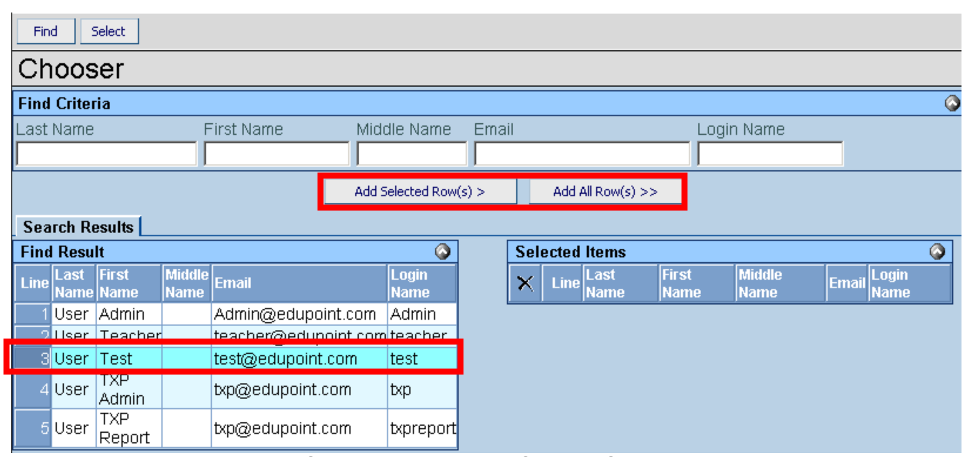
2. Enter all or part of the user's **Last Name**, **First Name**, **Middle Name**, **Email**, and/or **Login Name**, and then click the **Find** button. Users matching the criteria entered are displayed in the **Find Result** grid.



Finding Users using the Chooser Screen

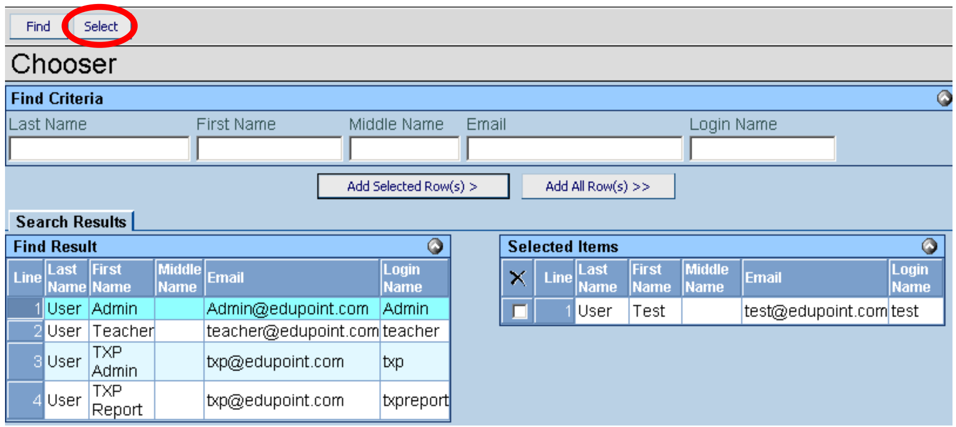
3. Click the user to add, or Ctrl-click to select multiple users, and click the **Add Selected Row(s)>** button. To add all of the users in the **Find Result** grid, click the **Add All Row(s)>>** button.

   Added users appear in the **Selected Items** grid.



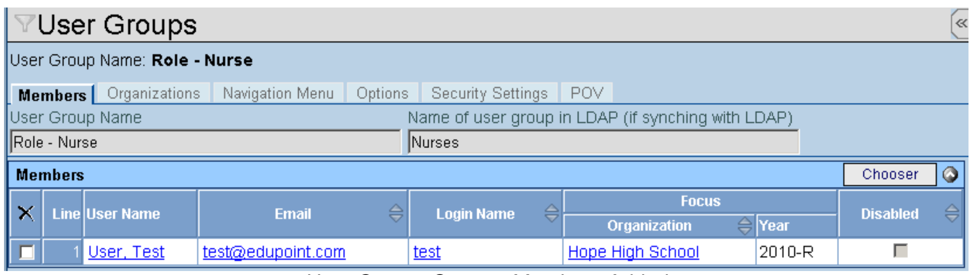
Selecting Users in the Chooser Screen

4. When all users have been selected, click the **Select** button.



Adding Users using the Chooser Screen

The selected users appear in the **Members** grid.



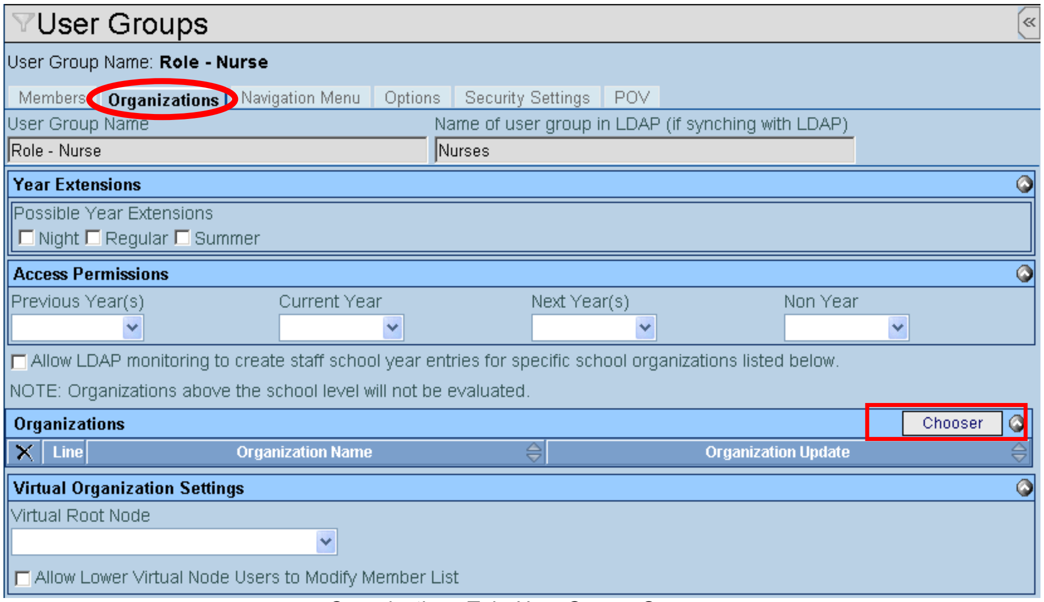
User Groups Screen, Members Added

5. Click the **Save** button at the top of the screen.

Organizations Tab

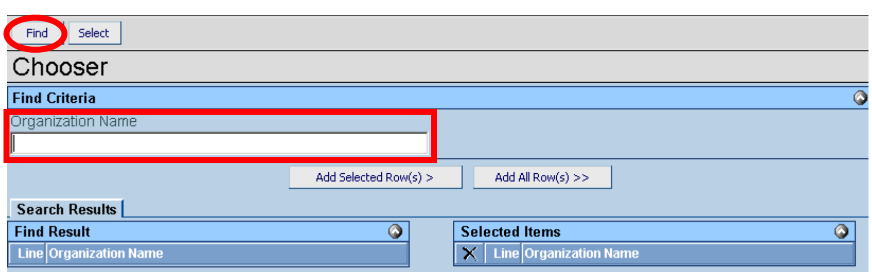
To specify what type of access this user group has to the organizations in the district:

1. Click the **Organizations** tab.



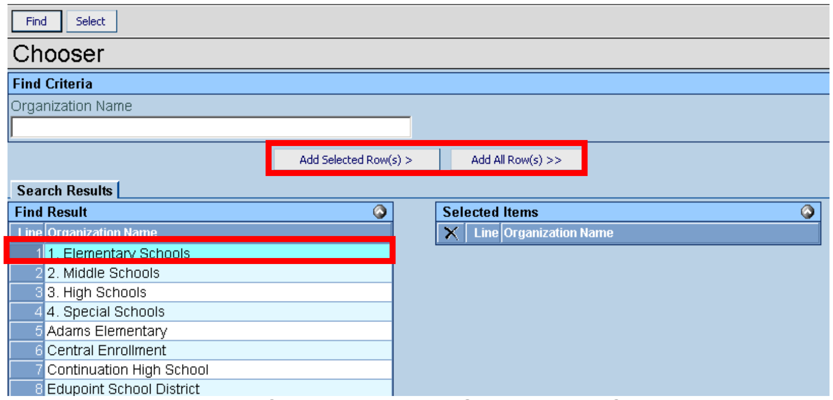
Organizations Tab, User Groups Screen

2. To grant the group access to a year extension, check the appropriate box in the **Year Extensions** section.
3. To specify the years to which the organization has access, select **None**, **View**, or **Update** in each list in the **Access Permissions** section.
4. If staff members should be added automatically to the schools listed in the **Organizations** grid when their LDAP accounts are active, check the **Allow LDAP Monitoring** box.
5. To add one or multiple organizations, click the **Chooser** button. The **Chooser** screen opens.
6. Enter all or part of the **Organization Name** and click the **Find** button, or just click the **Find** button for a full list of organizations. Organizations matching the criteria entered are listed in the **Find Result** grid.



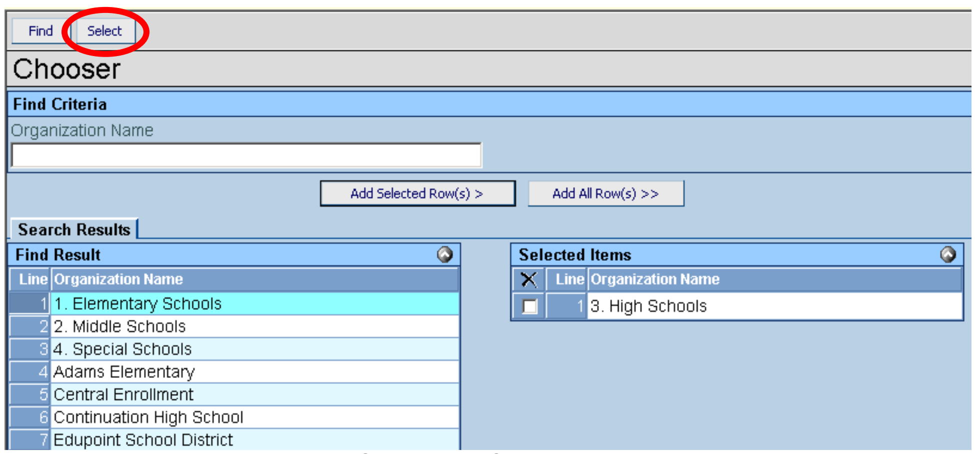
Chooser Screen

7. Click the organization to add, or Ctrl-click multiple organizations, and click the **Add Selected Row(s)>** button. To add all organizations in the **Find Result** grid, click **Add All Row(s)>>**.



Adding Organizations to the Selected Items Grid

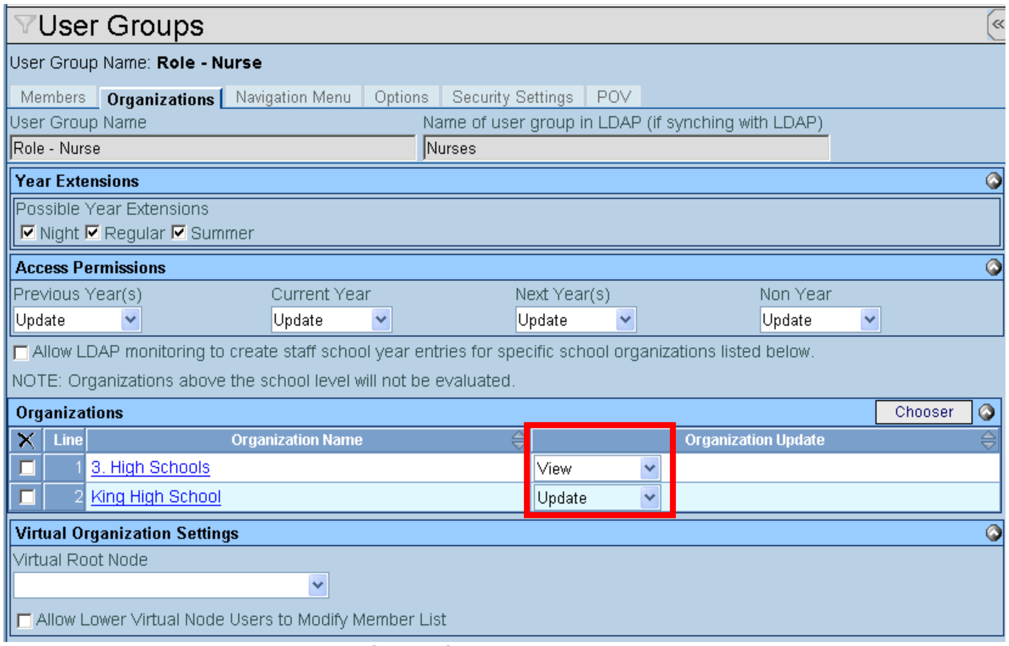
8. Click the **Select** button.



Selecting the Organizations

The selected organizations appear in the **Organizations** grid.

9. In the **Organization Update** column, set the level of access this group will have to the organization by selecting **None**, **View**, or **Update**.

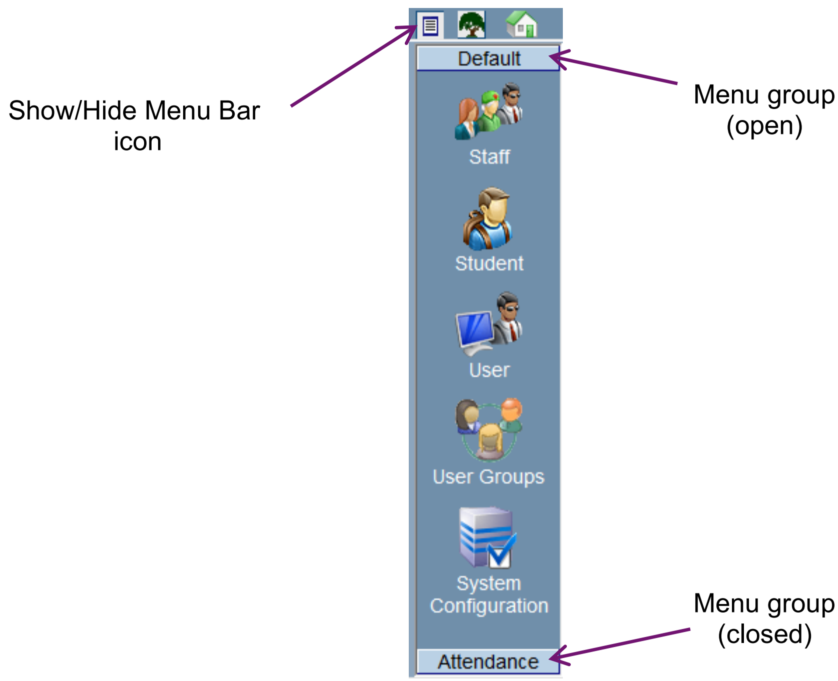


Setting Organization Access

10. Select the **Virtual Root Node** to assign the group to a different virtual root. The virtual root node is the level of the organization, such as Elementary Schools, to which this group is added. By default, groups are added to the district level.
11. Check the **Allow Lower Virtual Node Users to Modify Member List** box to let users at organizations underneath the selected virtual node add users to and remove users from the group. This works with Organization user groups only.
12. Click the **Save** button at the top of the screen.

Navigation Menu Tab

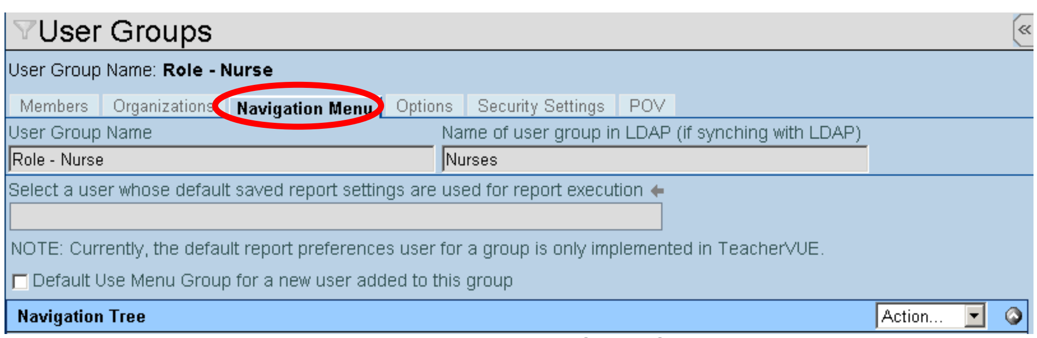
The menu bar is a customizable of toolbar at the left of the screen. A user who belongs to more than one group can use the menu groups for all of them. Menu groups created for the user group or user have Lock symbols next to their names.



Menu Bar Example

To create a custom menu group for this user group:

1. Click the **Navigation Menu** tab.

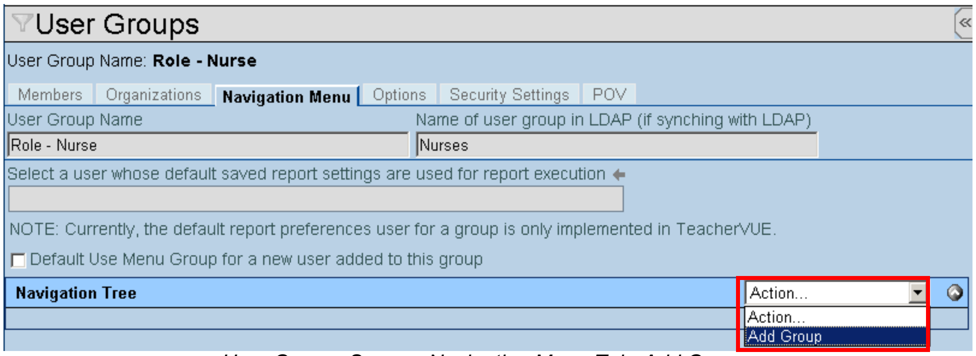


Navigation Menu Tab, User Groups Screen

Note – The **Select a user whose default saved report setting are used for report execution** value works only for the TeacherVUE software. For more information, see the *Synergy SIS – TeacherVUE Administrator Guide*.

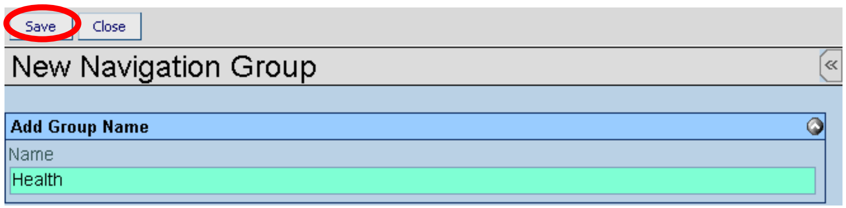
2. To have this menu group appear automatically for new users added to the user group, check the **Default Use Menu Group** box.

3. To create the menu group to be used by this user group, select **Add Group** from the **Action…** list.



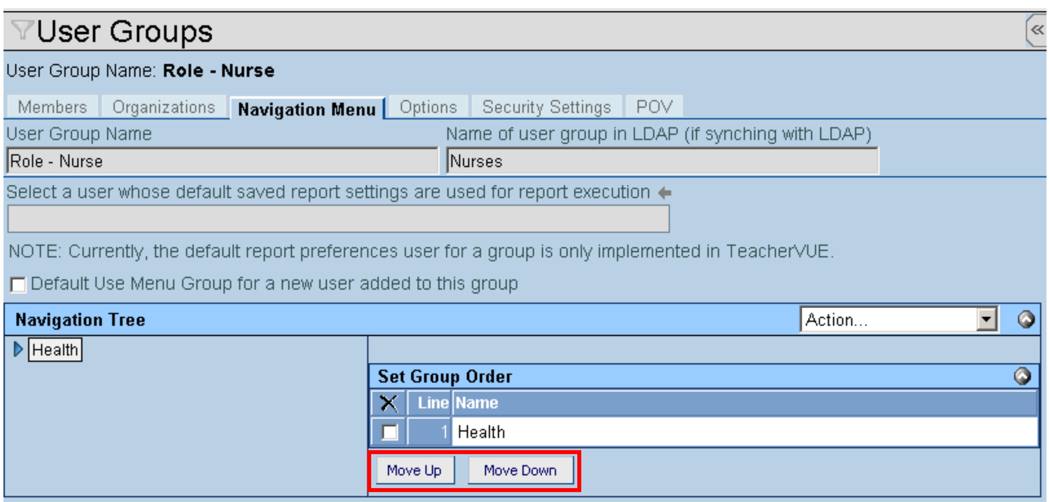
User Groups Screen, Navigation Menu Tab, Add Group

4. Enter a name for the menu group in the **Name** box, and click the **Save** button.



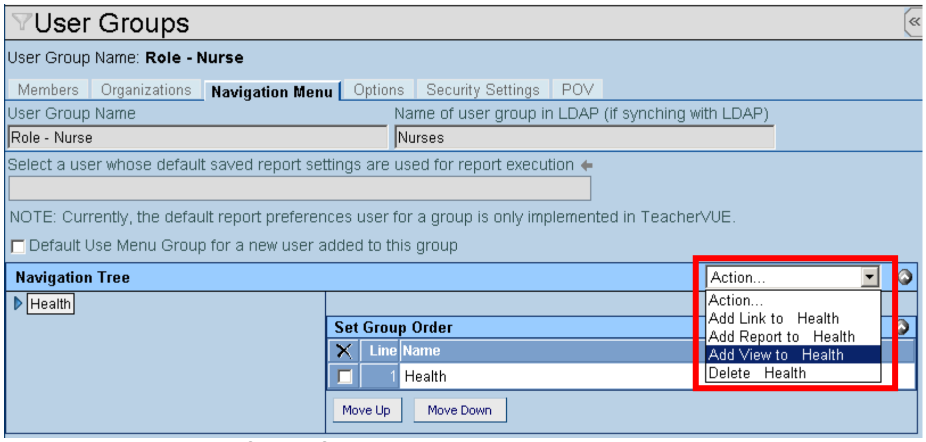
New Navigation Group Screen

5. The new group appears in the **Navigation Tree** section.
6. If multiple menu groups have been created, you can change the order in which they appear clicking the group and then clicking the **Move Up** or **Move Down** button. Menu groups created by the user appear above those created for user groups.

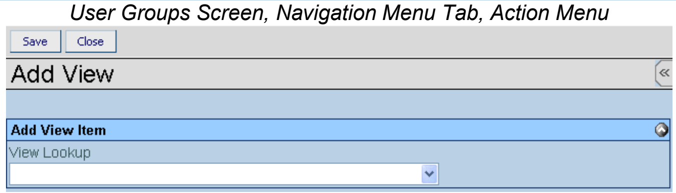


Adjusting Menu Group Order

7. To add a screen or report to the group, click **Add View to** or **Add Report to** from the **Action…** list, select the desired screen or report, and click **Save**.
   Add Link to under development and will be available in a future release.



User Groups Screen, Navigation Menu Tab, Action Menu

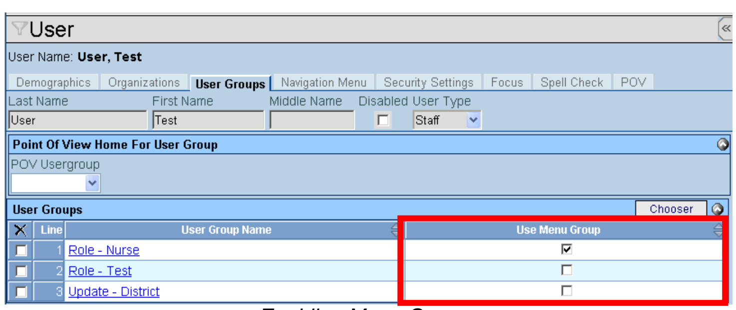


Add View Screen

Note – TeacherVUE screens should be added for TeacherVUE users only. TeacherVUE screens show **(K12.TXPInfo)** following the name of the screen. For more information, see the *Synergy SIS – TeacherVUE Administrator Guide*.

8. To save the changes to the menu, click the **Save** button.

9. To enable the menu for a user, go to **Synergy SIS > System > User > User**, find the user's record, and on the **User Groups** tab, check the **Use Menu Group** box for the user group.
   This is unnecessary if the user was added to the group after the **Default Use Menu Group** box was checked. (See step 2)

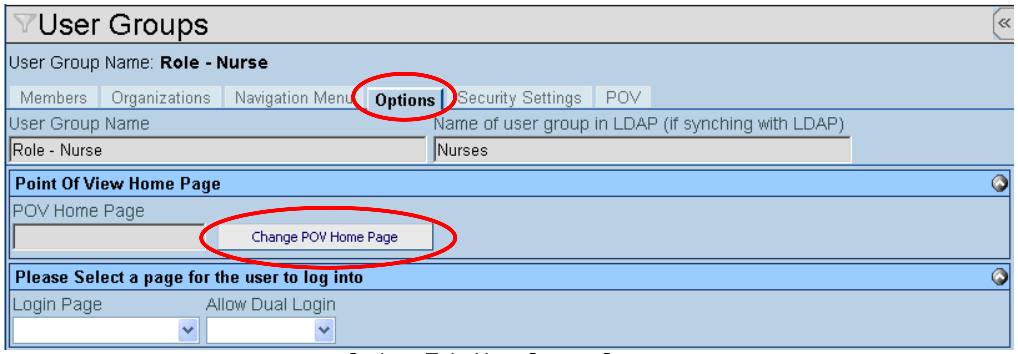


Enabling Menu Groups

Options Tab

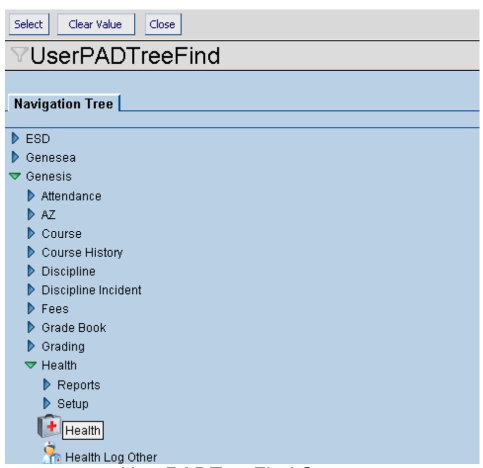
The **Options** tab sets up the initial screen for users in the group. To configure these settings:

1. Click the **Options** tab.



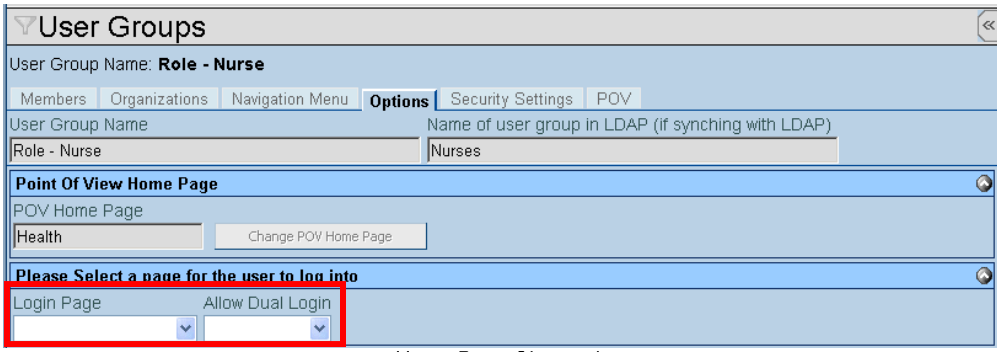
Options Tab, User Groups Screen

2. To change the default POV home page that users in the group see when they log in to Synergy SIS:
   a. Click the **Change POV Home Page** button. The UserPADTreeFind screen opens.
   b. In the **UserPadTreeFind** screen, navigate to and select the screen to use for the home page.



UserPADTreeFind Screen

c. Click the **Select** button at the top of the screen.



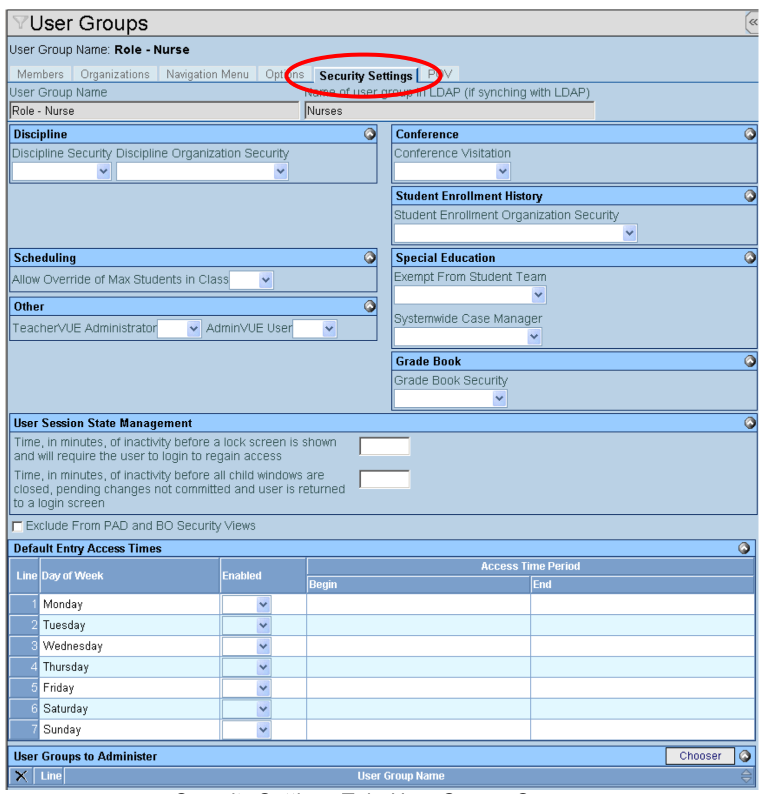
Home Page Changed

3. To change the **Login Page** and **Allow Dual Login** options for the TeacherVUE software, see the *Synergy SIS – TeacherVUE Administrator Guide*.

Security Settings Tab

To adjust global security options for a user group:

1. Click the **Security Settings** tab.



Security Settings Tab, User Groups Screen

Notes

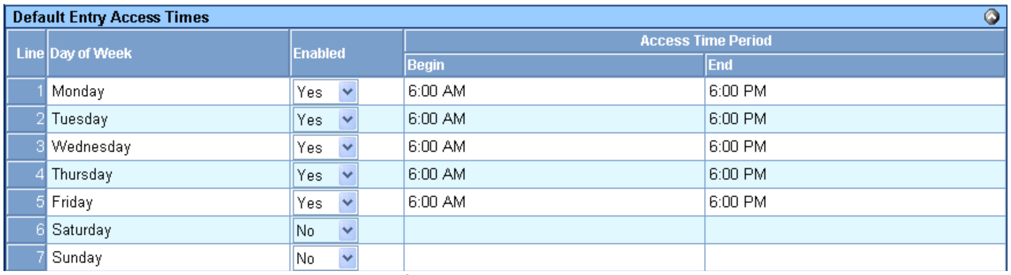
Settings in the **Discipline** and **Conference** sections work in conjunction with security settings for District and Conference codes. See Chapter Four in the *Synergy SIS – Discipline & Conference Administrator Guide.*

Settings in the **Student Enrollment History** section control whether users in the group can edit enrollment history outside of the organizations to which they have update access. See the *Synergy SIS – Student Information Administrator Guide*.

Settings in the **Special Education** section work with the Synergy SE software. See the *Synergy SE – System Administrator Guide*.

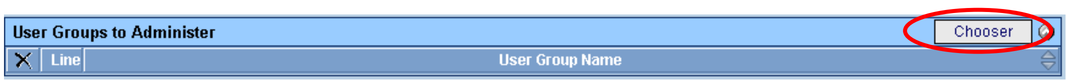
2. To enable the users to add a student to a section even if there are no spaces available, click **Yes** in the **Allow Override of Max Students in Class** list.
3. If the users in the group will manage the TeacherVUE software, click **Yes** in the **TeacherVUE Administrator** list. Users designated as TeacherVUE administrators can select any teacher's class instead of just their own.
4. If the users are allowed to use the AdminVUE mobile application, click **Yes** in the **AdminVUE User** list.
5. If the users are teachers who should have access to their classes only, click **District User** in the **Grade Book Security** list. If the users can change the district-wide settings for Grade Book, , click **District Admin**. If users can see all classes, click **Principal**. For more information about the Grade Book security, see the *Synergy SIS – Grade Book Administrator Guide*.
6. In the **User Session State Management** section, you can override the district settings in the **System Configuration** screen: Enter the number of minutes before the user's screen is locked and/or the number of minutes before the user is logged off.
7. To hide this user group when customizing the security in the **PAD Security** screen and **Security Definition** screen, check the **Exclude From PAD and BO Security Views** box. This can be helpful to prevent changes in a group's security, particularly for organization-based security groups that shouldn't be modified in the PAD and BO Security screens.

8. To limit the times during which users can access Synergy SIS, set the **Default Entry Access Times**: Enter the start time in the **Begin** column and end time in the **End** column for each day in HH:MM AM/PM format. To enable access for a day, click **Yes** in the **Enabled** list.



Default Entry Access Times

9. To allow this group to edit other user groups' settings and membership, click the **Chooser** button in the **User Groups to Administer** section, and find and select the groups.



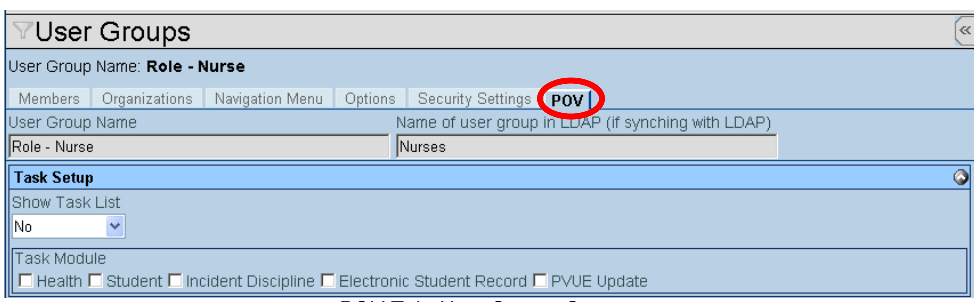
User Groups to Administer Section

10. Click the **Save** button at the top of the screen.

POV Tab

To modify whether and how a task list is displayed on the home page of Synergy SIS for this user group:

1. Click the **POV** tab.



POV Tab, User Groups Screen

2. To show the task list for the group, set **Show Task List** to **Yes**.
3. Check the boxes for the task modules to display. For more information about tasks, see the section on Task Definition in Chapter Nine of this guide.
4. Click the **Save** button at the top of the screen.

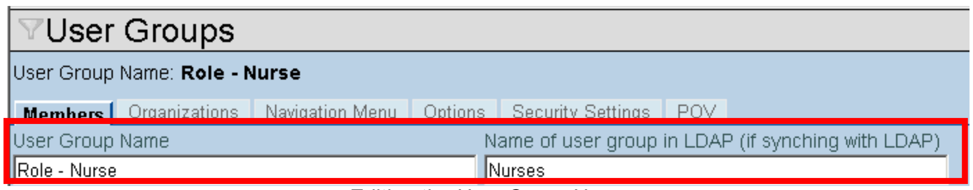
EDITING USER GROUPS

All information on the **User Groups** screen can be edited as described in the Adding User Groups section in this chapter except **User Group Name** and **Name of user group in LDAP**. To edit these:

1. Click the **Menu** button and select **Edit SISUserGroup Data**.

Menu Options

2. Make the desired changes.

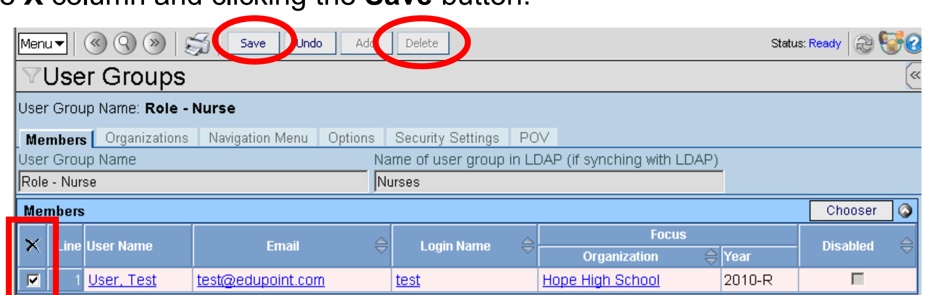


Editing the User Group Name

3. Click the **Save** button at the top of the screen.

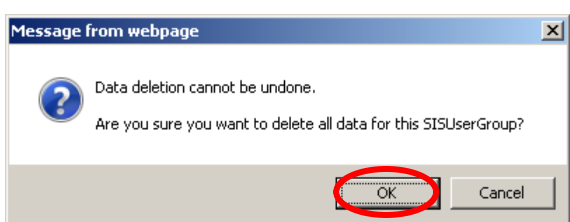
To delete a user group:

1. Remove all of the members from the **Members** tab of the group by checking boxes in the **X** column and clicking the **Save** button.



Removing Members

2. Click the **Delete** button at the top of the screen. A message box opens to confirm the deletion of the group.

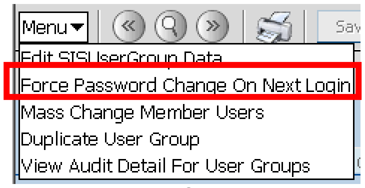


Message Box

3. Click **OK** to delete the group.

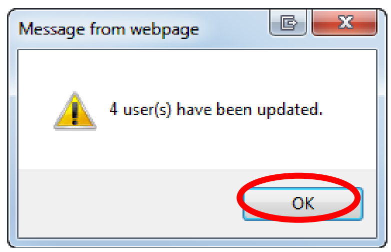
If LDAP integration has not been turned on and the users are logging in to Synergy SIS using their Synergy SIS user names and passwords, it may be necessary to force the users to change their passwords occasionally for security. Rather than setting a password change for each individual user, a mass change can be set for the group. To force a password change for all users in a group:

1. Click the **Menu** button and select **Force Password Change on Next Login**. A message box opens, confirming that all the users have been set to change their password the next time they log in to Synergy SIS.



Menu Options

2. Click **OK** to close the box.



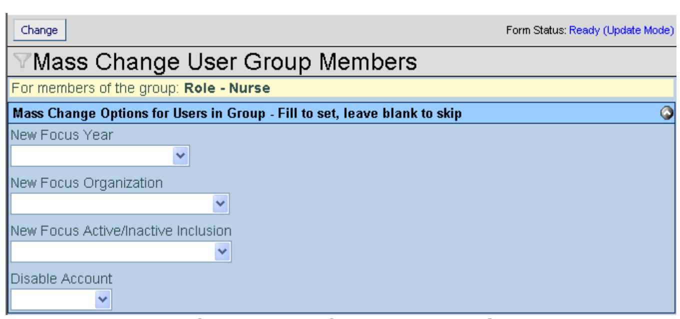
Message Box

Occasionally it may be necessary to change the focus for a group of users, as at the beginning of the school year. To make these changes for an entire user group instead of for each user individually:

1. Click the **Menu** button and select **Mass Change Member Users**. The **Mass Change User Group Members** screen opens.

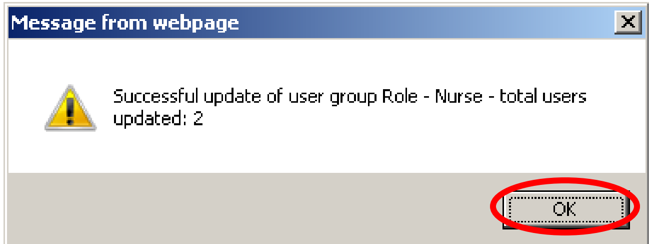
Menu Options

2. Select the **New Focus Year**, **Organization** and/or **Active/Inactive** settings.



Mass Change User Group Members Screen

3. Click the **Change** button at the top of the screen. A message box opens, confirming the change.
4. Click the **OK** button to close the message box.



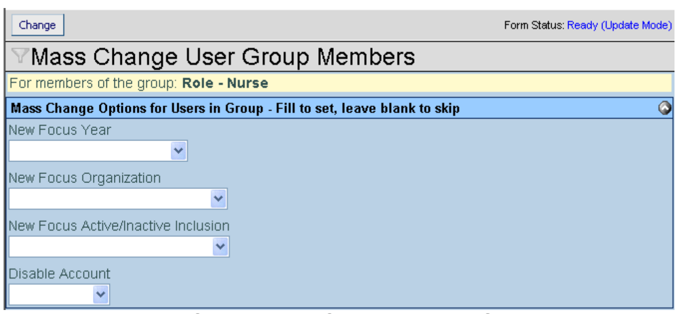
Message Box

Occasionally it may be necessary to disable the user accounts for a group of users.

5. Click the **Menu** button and select **Mass Change Member Users**. The **Mass Change User Group Members** screen opens.

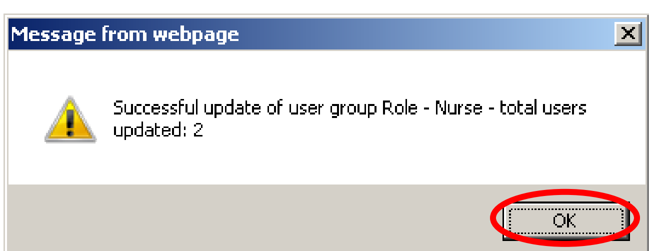
Menu Options

6. In the **Disable Account** list, click **Yes**.



Mass Change User Group Members Screen

7. Click the **Change** button at the top of the screen. A message box opens, confirming the change.
8. Click the **OK** button to close the message box.



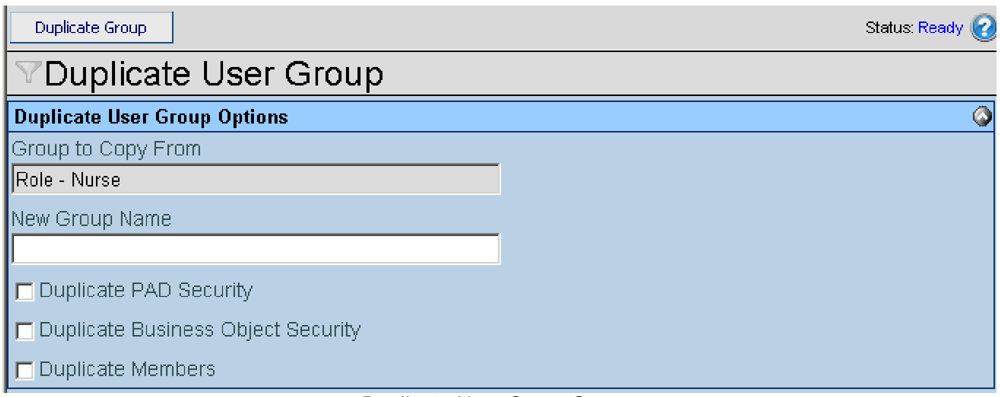
Message Box

To quickly create a user group with all of the settings of the user group in focus:

1. Click the **Menu** button and select **Duplicate User Group**. The **Duplicate User Group** screen opens.

Menu Options

2. Enter the name of the group in the **New Group Name** box.



Duplicate User Group Screen

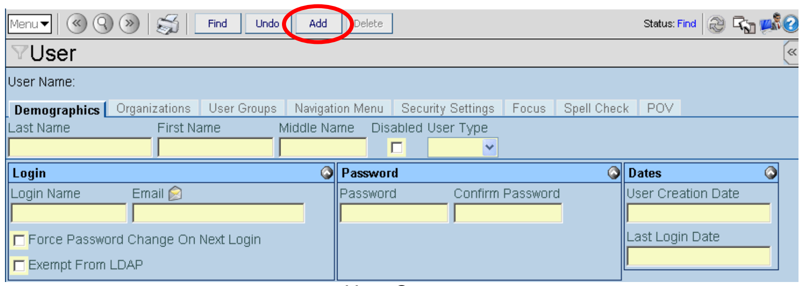
3. To copy the settings for the **PAD Security** and **Security Definition** screens, check the **Duplicate PAD Security** and **Duplicate Business Object Security** boxes. By default, all settings in the User Groups screen are copied.
4. To copy the users assigned to the group, check the **Duplicate Members** box.
5. Click the **Duplicate Group** button.

ADDING USERS

As explained on page 98, a person cannot be added to the **User** screen unless already listed in the **Staff** screen.

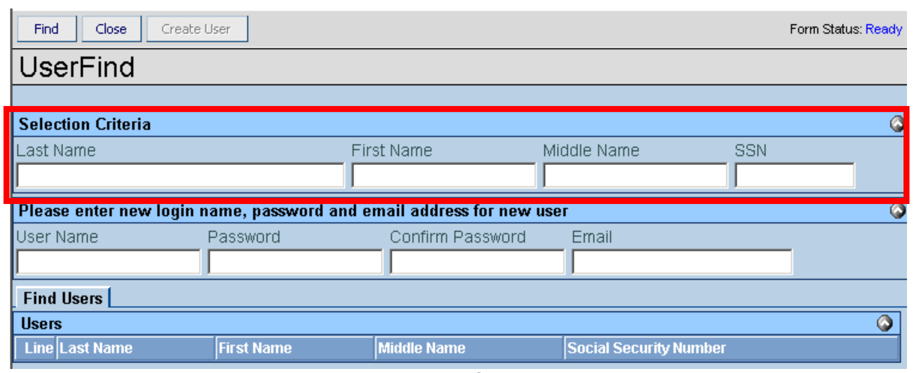
To create a user account:

1. Go to **Synergy SIS > System > User > User**.



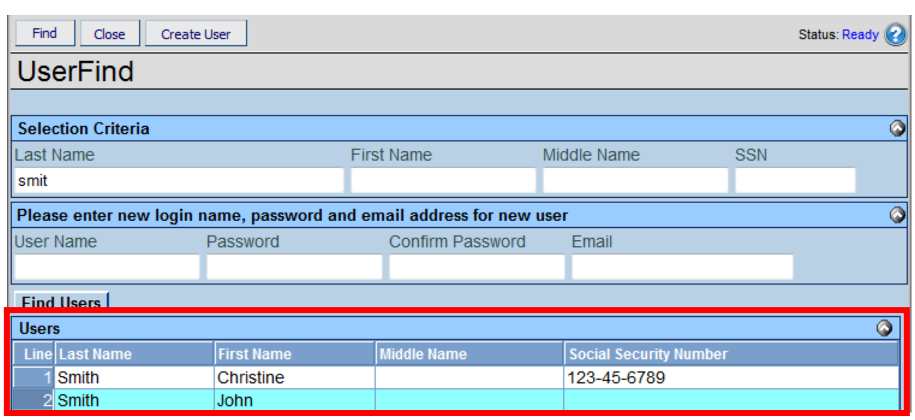
User Screen

2. Click the **Add** button. The **UserFind** screen opens.



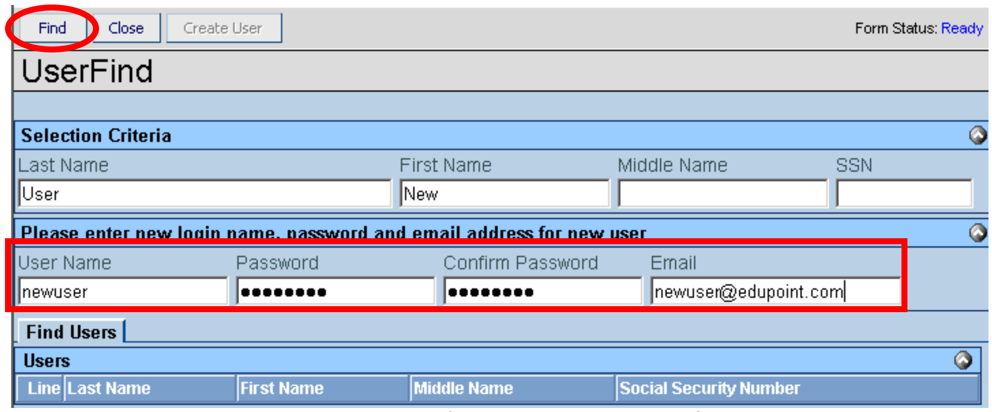
UserFind Screen

3. In the **Selection Criteria** section, enter all or part of the **Last Name**, **First Name**, **Middle Name**, and/or **SSN** of the staff account.
4. Click the **Find** button.
5. In the **Users** section, click the staff member for whom you are creating a user account.



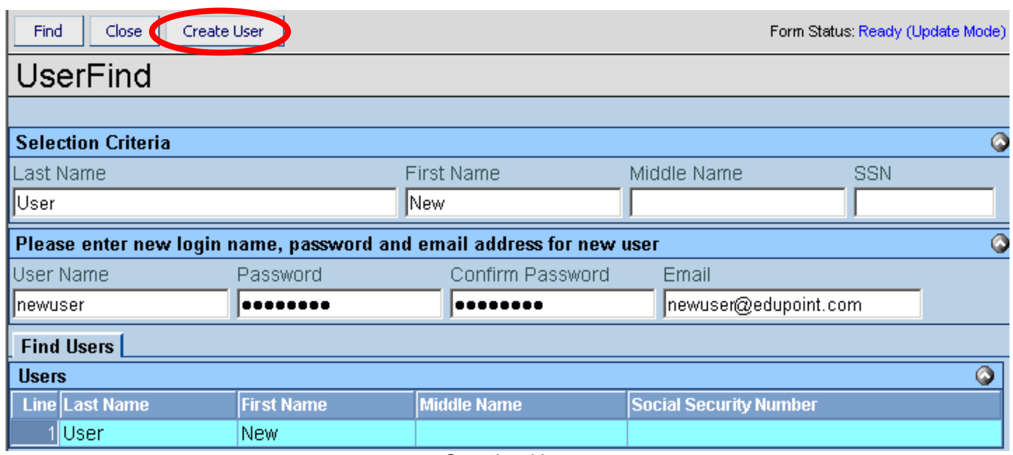
Selecting Staff Member for User Account

6. Enter the **User Name** for the new account, enter a password in the **Password** and **Confirm Password** boxes, and enter an **Email** address.



Entering New User Information in the UserFind Screen

7. Click the **Create User** button at the top of the screen to create the user account.



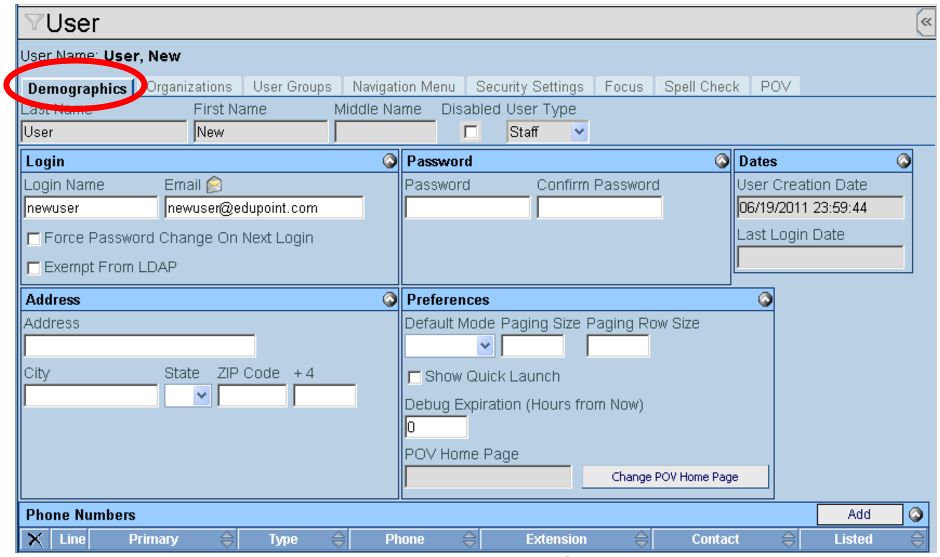
Creating User

8. The new user is created and the new account is brought into focus in the User screen.

Demographics Tab

The **Demographics** tab records the user's address and phone information and miscellaneous settings. It also shows, in the Dates section, when the user account was created, and when the user last logged in.

1. To force the user to change their password when they log in to the new account, check the **Force Password Change on Next Login** box.



Demographics Tab, User Screen

2. If the district is using LDAP for logins to Synergy SIS (as set up in the **System Configuration** screen), you can designate the user as **Exempt From LDAP** by checking the box. This can be helpful for Synergy SIS system accounts that don't have corresponding accounts in LDAP.
3. The **Address** and **Phone Numbers** sections display the home address and phone numbers. Any changes to this information are reflected in both the **Staff** and **User** screens.
4. **Default Mode** determines whether the user is in **Edit** mode or **Inquiry** mode when logging in to Synergy SIS. In Inquiry mode, all screens are read-only, and the user must click the **Edit** button at the top of a screen to make changes to that screen. Edit mode enables editing as soon as a screen opens.
5. Enter a **Paging Size** and a **Paging Row Size** for the user to determine the display of search results in screens such as **Chooser** and **Find**. The number of records displayed on one page is controlled by **Paging Row Size**, which has a default value of 20 rows. **Paging Size** determines the number of pages that are displayed at the bottom of the search results. The default is 15. Higher numbers add the convenience of more results per page, but the possible inconvenience of slightly slower searches.
6. Check the **Show Quick Launch** box to display for the user a **Quick Launch** box for typing the name of a screen or report.

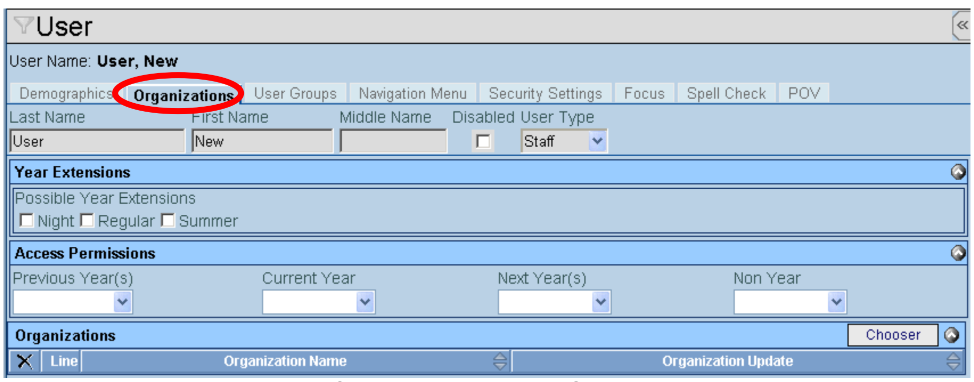
Quick Launch

7. If the user is experiencing errors and the Edupoint support team advises you to turn on logging, do so by increasing the value in the **Debug Expiration** field. The number is how many hours for which to generate a log. A value of 0 turns logging off.
8. Click **Change POV Home Page** to select the screen to display when the user logs in to Synergy SIS. This can also be set at the User Group level.
9. Click the **Save** button at the top of the screen.

Organizations Tab

The **Organizations** tab gives the user access to organizations set up in Synergy SIS. It is strongly recommended to set organization access through the user group memberships and edit this tab only for users who require unique settings.

The settings on this tab are the same as those described on page 140 for the **Organizations** tab of the **User Groups** screen.

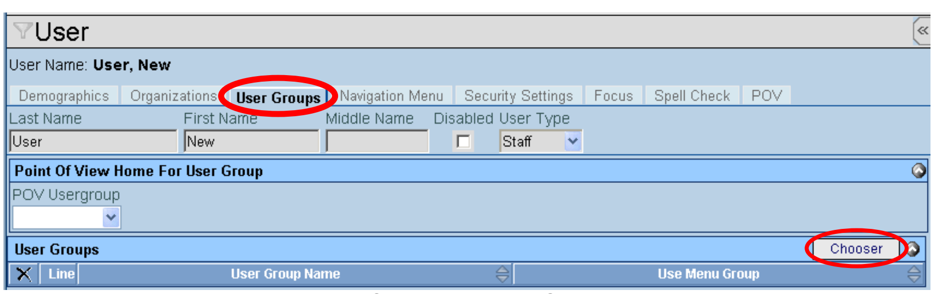


Organizations Tab, User Screen

User Groups Tab

You define the user's membership in groups on the **User Groups** tab. To add the user's groups:

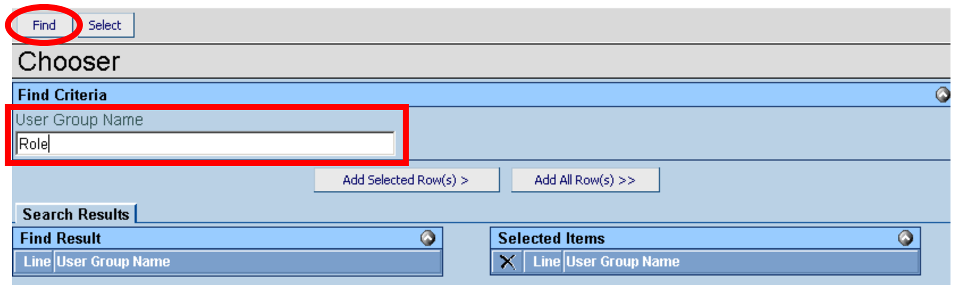
1. Click the **User Groups** tab.



User Groups Tab, User Screen

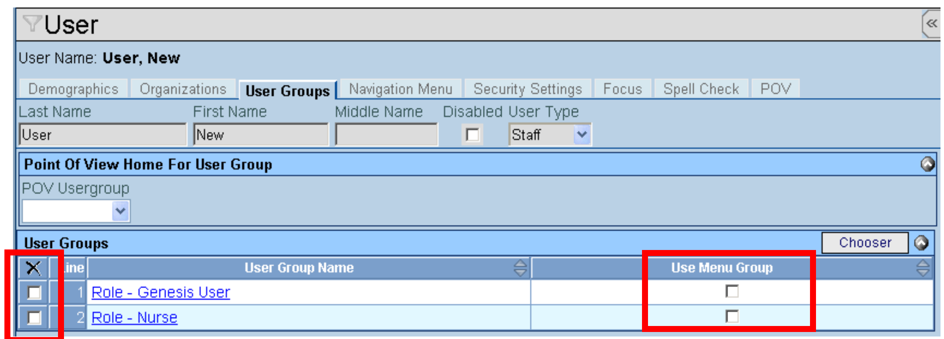
2. Click the **Chooser** button in the **User Groups** section. The **Chooser** screen opens.

3. Enter all or part of the **User Group Name** and click the **Find** button at the top of the screen.



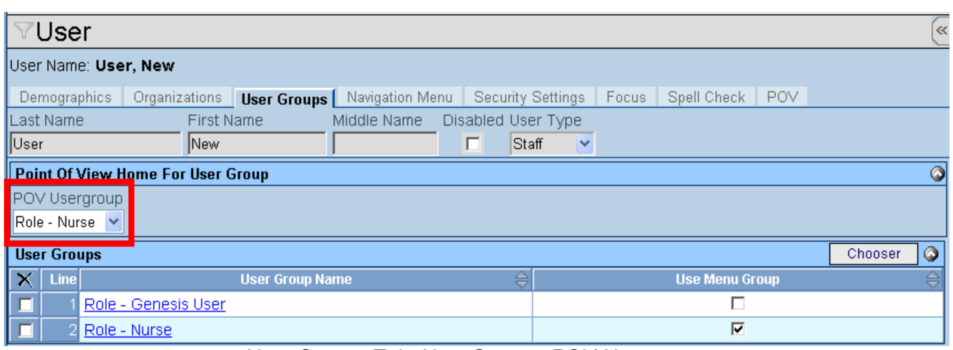
Chooser Screen

4. Select the desired group or groups, which then are listed in the **User Groups** grid.



User Groups Tab, User Screen, Groups Added

5. To display for this user a menu group created for a user group (see page 143), check the box in the **Use Menu Group** column.
6. Click the **Save** button at the top of the screen.
7. Set the user's POV home page to the home page defined for a user group by selecting the group in the **POV Usergroup** list. As an alternative, you can set the POV home page for the individual user on the **Demographics** tab.

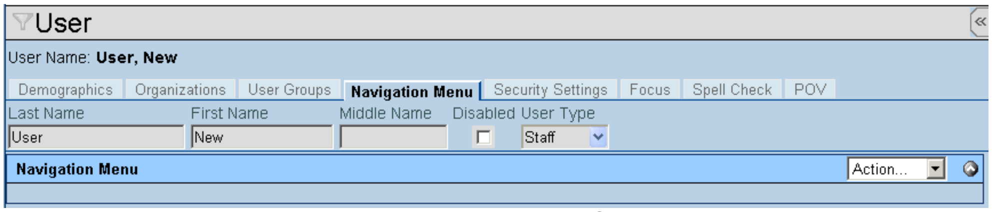


User Groups Tab, User Screen, POV Usergroup

8. Click the **Save** button at the top of the screen.

Navigation Menu Tab

The **Navigation Menu** tab shows the menu groups for the user. These can be edited and changed by the user, unlike the menu groups set up through the **User Groups** screen. In the rare case it is necessary to edit these user-defined groups through this tab, the procedure is the same as described for user groups on page 143.

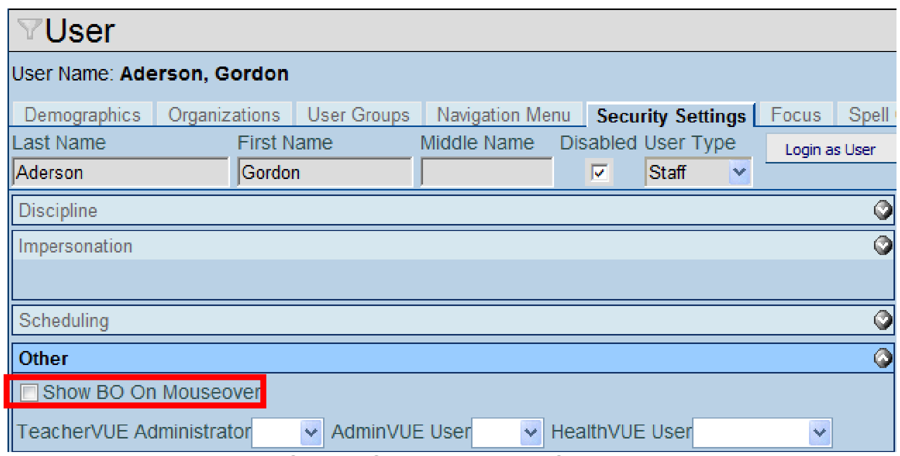


Navigation Menu tab, User Screen

Security Settings Tab

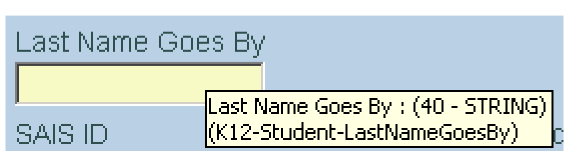
All but one of the settings on the **Security Settings** tab—**Show BO on Mouseover**—can be defined for user groups. It is strongly recommended to adjust these settings through the user group memberships and edit this tab only for users who require unique settings.

To edit the settings, follow the instructions on page 147 for editing the security settings for user groups.



Security Settings Tab, User Screen

The one setting that is unique to the **Security Settings** tab of the **User** screen is the **Show BO on Mouseover** check box in the **Other** section. When this option is turned on for a user, the name of the business object and property is shown when the user pauses the pointer over a field. The business object is the name following K12, and the property is the last part of the string. In the example below, the business object is Student and the property is LastNameGoesBy. This is particularly helpful when creating queries.



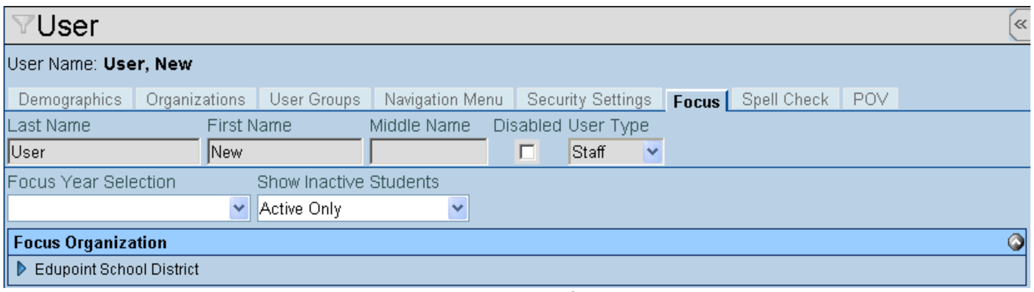
BO on Mouseover

Focus Tab

The **Focus** tab specifies the year and organization for the user, and whether the user sees active or inactive students, or both. The focus can be changed by the user, and the information on the **Focus** tab updates to show the current setting.

When a new user is created, the focus is set to the top-level organization (generally the district), the year is blank, and only active students are shown. Be sure to change this when creating a new user to focus on the current year and an organization to which the user has access. If the user does not have access to the organization in focus or the year is set incorrectly, the user will not be able to log in to Synergy SIS. To set the focus:

1. Click the **Focus** tab.



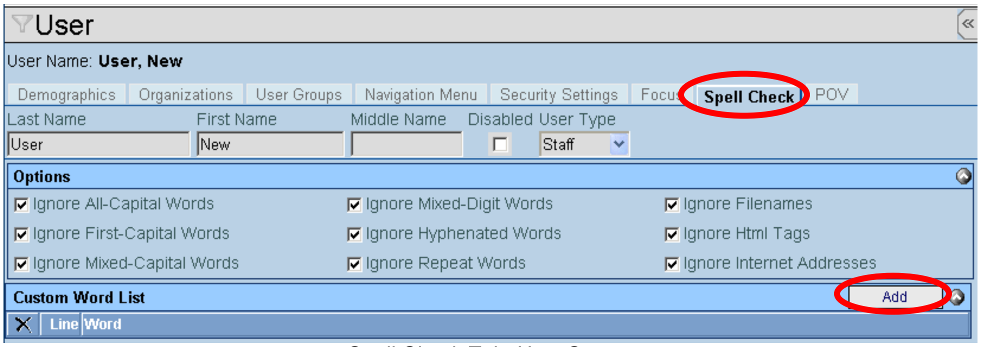
Focus Tab, User Screen

2. Select the current school year in the **Focus Year Selection**, and change the **Show Inactive Students** setting if needed.
3. To select the focus organization, click triangles if necessary to expand the tree, and click the organization.
4. Click the **Save** button at the top of the screen.

Spell Check Tab

Several boxes throughout Synergy SIS offer a spell checking function. Users can adjust their own spell check settings, and you can adjust them in the User screen.

1. Click the **Spell Check** tab.

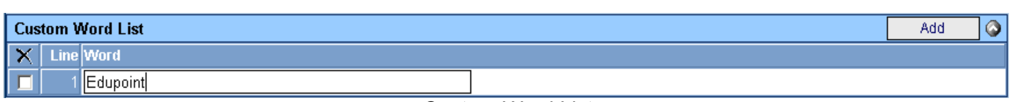


Spell Check Tab, User Screen

2. Check or uncheck the **Options** available for the spell check. The options are:

   - **Ignore All-Capital Words** – words that are in all capital letters, such as **SYNERGY SIS**.
   - **Ignore First-Capital Words** – words where the first letter is capitalized, such as **Edupoint**.
   - **Ignore Mixed-Capital Words** – words with capital letters in the middle, such as **McAllister**.
   - **Ignore Mixed-Digit Words** – words that have numbers as well as letters, such as **W3C**.
   - **Ignore Hyphenated Words** – words that have a hyphen, such as **email**.
   - **Ignore Repeat Words** – words that are spelled the same throughout the text.
   - **Ignore Filenames** – words that represent computer file names, such as **word.exe**.
   - **Ignore HTML Tags** – words used in HTML tags, such as **<a href>**.
   - **Ignore Internet Addresses** – words included as part of a web address, such as **www.edupoint.com**.

3. Add custom words, such as the names of schools, to the standard dictionary. To add a custom word, click the **Add** button in the **Custom Word List** section, and type the word in the Word column of the new line.



Custom Word List

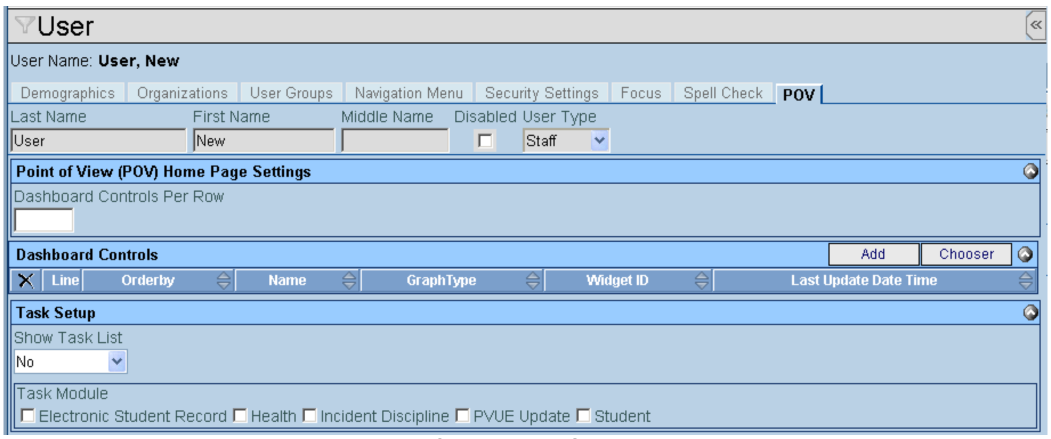
4. Click the **Save** button at the top of the screen.

POV Tab

The **POV** tab selects the dashboard widgets and task lists that appear on the user's default Synergy SIS home page. The user can also modify these options through the **User Profile** screen. Additional task list settings are available on the **POV** tab of the **User Groups** screen.

Before options for widgets and task lists can be selected, the widgets must be created and the tasks defined and enabled. For more information about tasks, see Chapter Eight. That chapter also shows methods to add the tasks to the user home page.

Instructions for creating and managing dashboard widgets are in the *Synergy SIS – Dashboard Guide*.



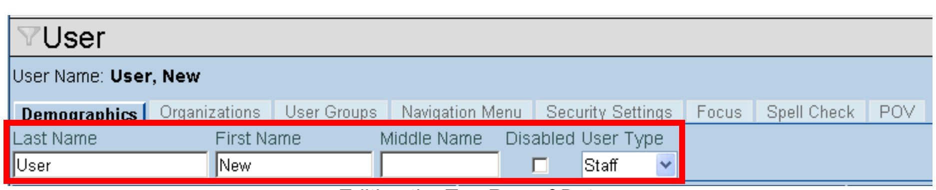
POV Tab, User Screen

EDITING USERS

You can edit any data on any tab, as described in the Adding Users section in this chapter, except the top row. To edit the top row:

1. Click the **Menu** button and select **Edit User Data**.

Menu Options



Editing the Top Row of Data

2. After any changes, click the **Save** button at the top of the screen.

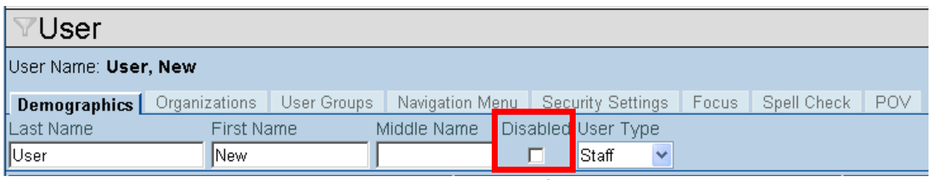
You should almost never delete user accounts. Deleting a user account deletes the staff account, which might be referenced in other records such as section or grading records, leaving those links to non-existent records. Only if the user account was just created could the account be deleted.

Instead of deleting the staff/user accounts, you should disable them. When a user record is disabled, the staff record is disabled. Disabled user accounts cannot be used to log in to Synergy SIS. Disabled staff accounts cannot be added to any new records, but previous records still show the staff name. To disable a user account:

1. Click the **Menu** button and select **Edit User Data**.

Menu Options

2. Check the box labeled **Disabled**, and click **Save** at the top of the screen.



Editing the Top Row of Data

Reference – The **User Password and Preferences** screen and the **User Profile** screen show options similar to those on the **User** screen, but only for the user currently logged in. These screens are explained in the *Synergy SIS – Student Information User Guide* and let users modify:

- Passwords
- Paging Size and Paging Row Size
- Demographic information
- Navigation menus that they have created
- Custom word list and options for spell checking
- Dashboard widgets displayed on their home pages
- Task lists displayed on their home pages

Users can also view their security settings.

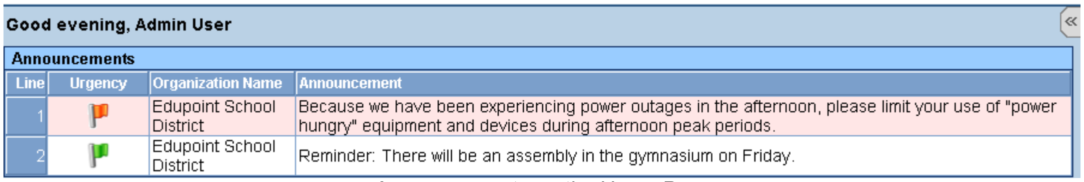
Chapter Five: ANNOUNCEMENTS AND ONLINE HELP

This chapter covers:

- ► Announcements
- ► Online Help
- ► Support Page
- ► Contact Us Link
- ► Login Page

ANNOUNCEMENTS

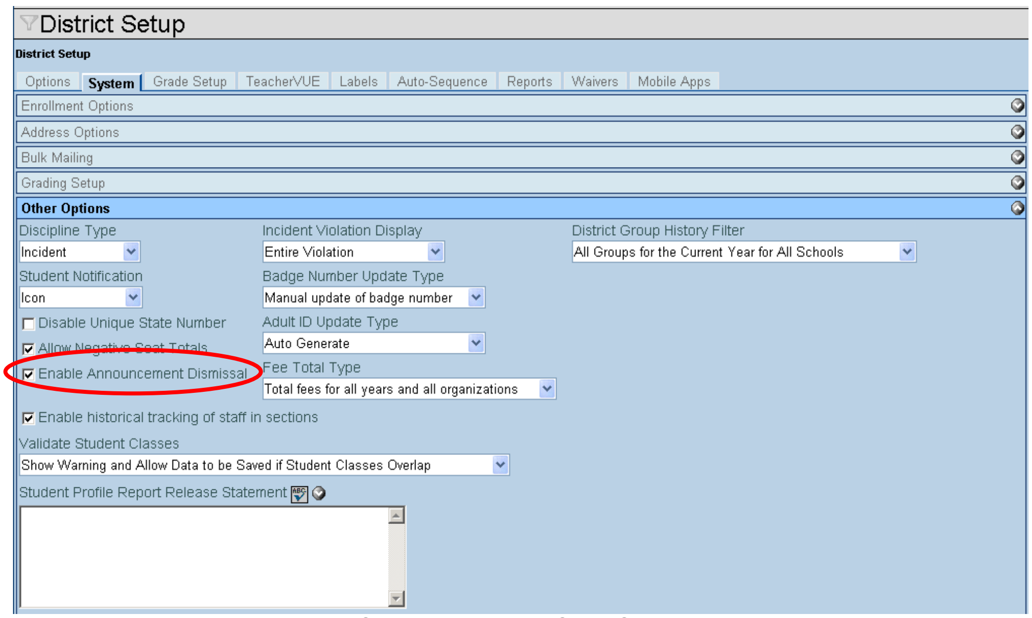
Announcements are displayed on the home page of Synergy SIS. They may be specific to any level of the organization: for example, a school, a group of schools such as all elementary schools, or the district.



Announcements on the Home Page

To allow announcements to be dismissed by staff members and hidden on the home page:

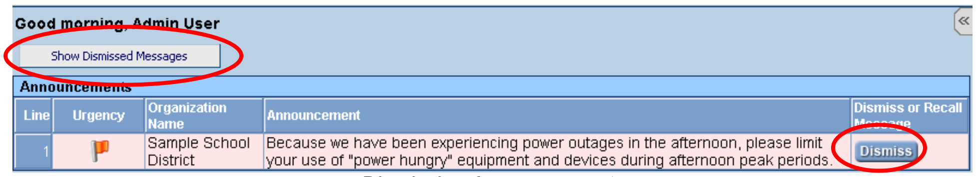
1. Go to **Synergy SIS > System > Setup > District Setup**.



System Tab, District Setup Screen

2. On the **System** tab, in the **Other Options** section, check the **Enable Announcement Dismissal** box.
3. Click the **Save** button at the top of the screen.

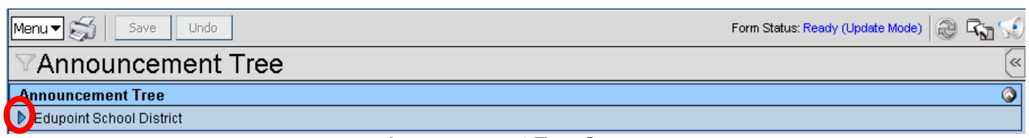
When the **Enable Announcement Dismissal** box is checked and dismissal of an individual announcement is allowed (see the procedure on the next page for adding or modifying an announcement), a **Dismiss** button shows next to the announcement. At the top of the home page, the **Show Dismissed Messages** button makes dismissed messages reappear with a **Recall** button for undoing the dismissal. Clicking **Show Dismissed Messages** turns it into a **Hide Dismissed Messages** button that hides them again.



Dismissing Announcements

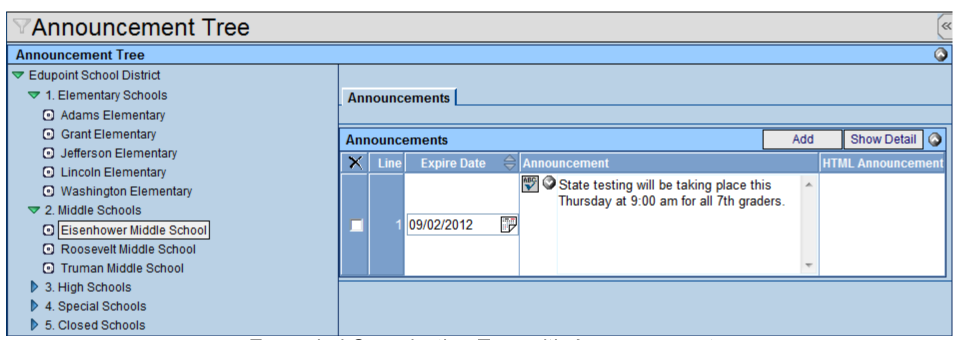
To add or modify an announcement:

1. Go to **Synergy SIS > System > Announcements > Announcement Tree**.



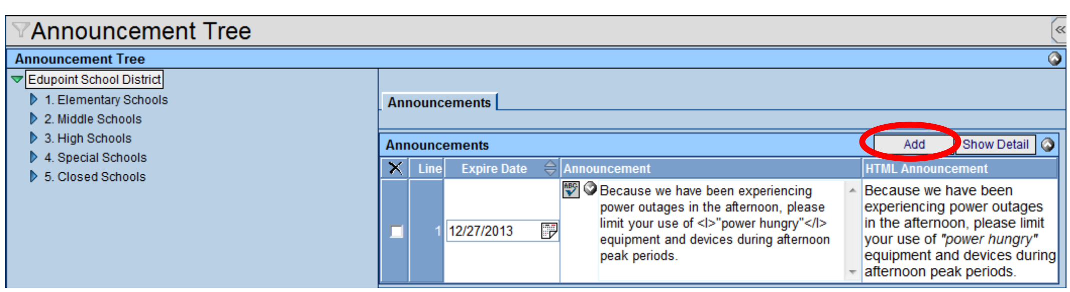
Announcement Tree Screen

2. Expand the organization tree as needed by clicking triangles, and click the organization for the announcement. Existing announcements for that organization are displayed on the right side of the screen.



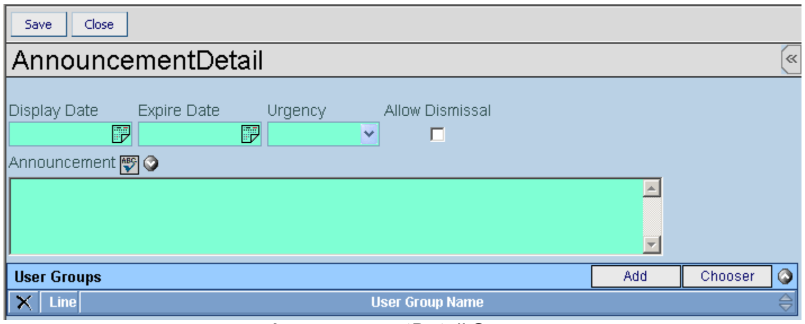
Expanded Organization Tree with Announcement

3. To add an announcement, click the **Add** button.



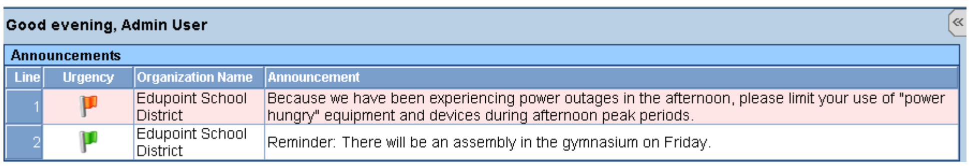
Adding a District Announcement

4. In the **AnnouncementDetail** screen, enter the date to begin displaying the announcement in the **Display Date** box, and the date to stop displaying the announcement in the **Expire Date** box.



AnnouncementDetail Screen

5. In the **Urgency** list, select the priority for the announcement. Announcements with **Normal** urgency are displayed in white with a green flag. Announcements marked as **Urgent** are highlighted in pink with a red flag.

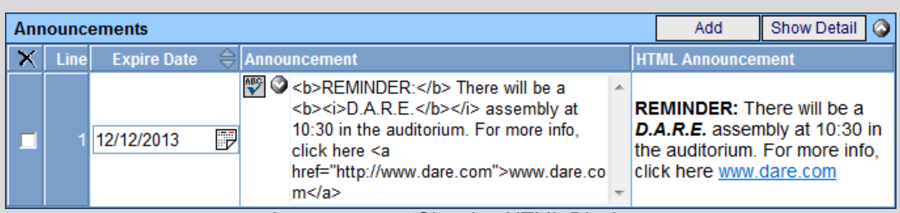


Urgency Markings

6. To allow the announcement to be dismissed from the home page, check the **Allow Dismissal** box.

7. Enter the text of the announcement in the **Announcement** box.

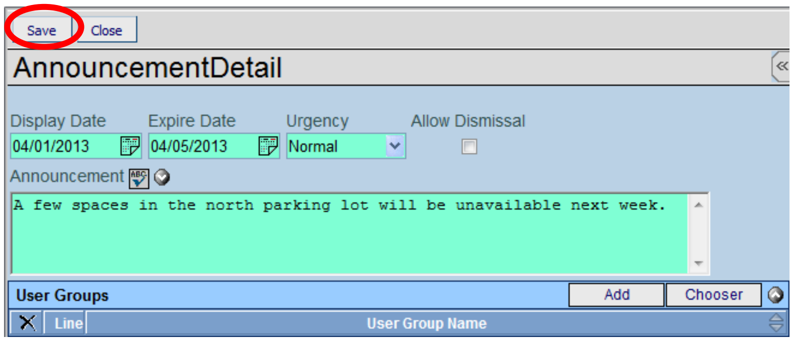
Note – You can include HTML tags in the announcement, for example to format text or include links. When you save the announcement, you can check the results in the **HTML Announcement** column on the **Announcement Tree** screen and make any needed edits as described on the next page.



Announcement Showing HTML Display

8. To display the announcement to specific user groups only, click the **Add** or **Chooser** button in the **User Groups** section, and find and select the desired group or groups.

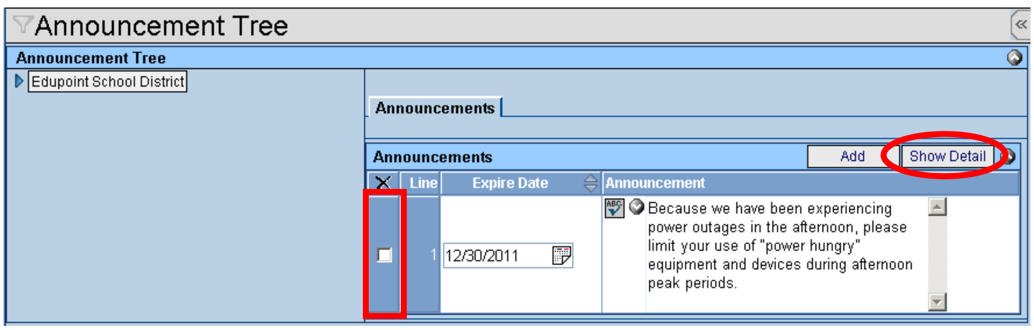
9. Click the **Save** button at the top of the screen.



Announcement Detail Screen

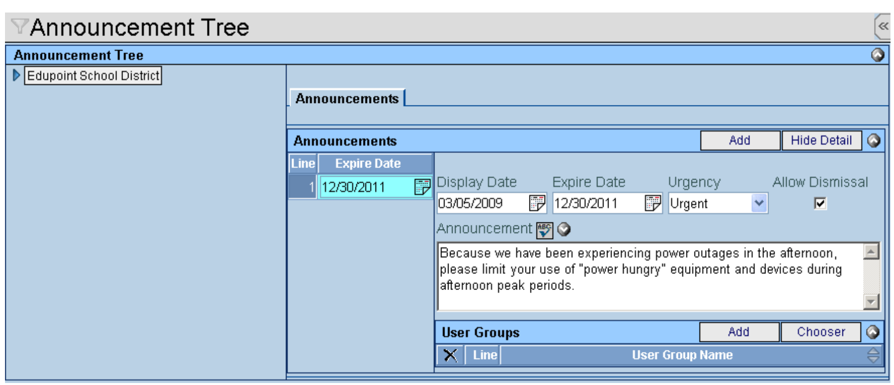
To edit an existing announcement:

1. Change the **Expire Date** and the **Announcement** text by clicking them and changing the information.



Editing an Announcement

2. To make other changes, click the **Show Detail** button.



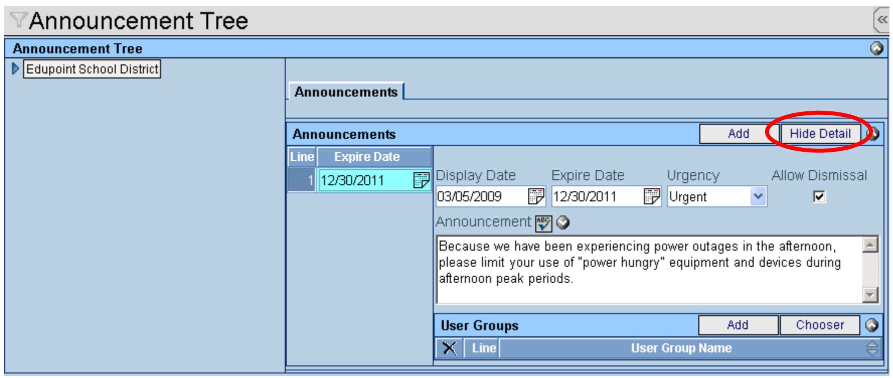
Announcement Detail

3. Click the **Line** number next to the **Expire Date** of the announcement to edit.

4. Make changes as needed.

> **Note –** To use the built-in HTML editor, click the **Edit HTML** button. To clear the **HTML Announcement** box while leaving the **Announcement** box unchanged, click the **Clear HTML** button.
>
> For information about the HTML editor, see page 240.

5. Click the **Save** button at the top of the screen.
6. Click the **Hide Detail** button to return to the main screen.



Main Screen, Announcement Tree

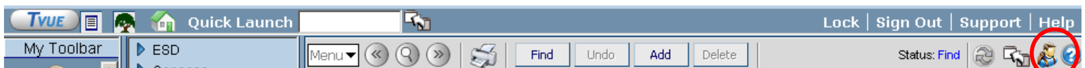
ONLINE HELP

Edupoint offers online help for both Synergy SIS and Synergy SE. Your district can choose to make this help available, to provide its own help, or both.

One way for users to access online help is by clicking the **Help** link in the top of any screen.

Accessing Online Help

Screen-specific help is accessed by clicking the question mark button on most screens.



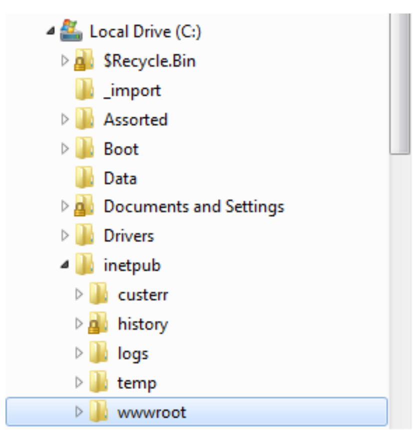
Accessing Context-Sensitive Help

The **Help** link and the question mark button can open the same help system or different help systems, depending on your configuration, as described on page 172.

Installing Help

To install Edupoint's online help:

1. Download the help from the Edupoint FTP site. For FTP access instructions, see the *Synergy SIS – System Installation Guide*.
2. Open the **_Release** directory, the subdirectory for your release, and the **Help** subdirectory. For example:
   `/_Release/8.0.0.0/Help/`
3. Download the zip file containing the appropriate help. The most general help is in Help_USA.zip; other files contain state-specific or other specialized information.
4. In Windows Explorer, navigate to the root of the location where Synergy SIS is installed on the web server (generally c:\inetpub\wwwroot), and create a new folder called Help.



Location for Help Folder

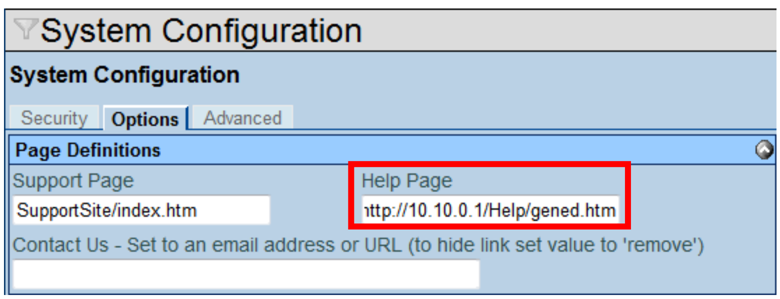
5. Extract the contents of the zip file into the root of the new Help folder.
6. Delete the zip file to save space, if desired.

> **Note** – If the district has multiple web servers, be sure to install the help files on each server. The location of the folder must be the same on each server.

Configuring Help

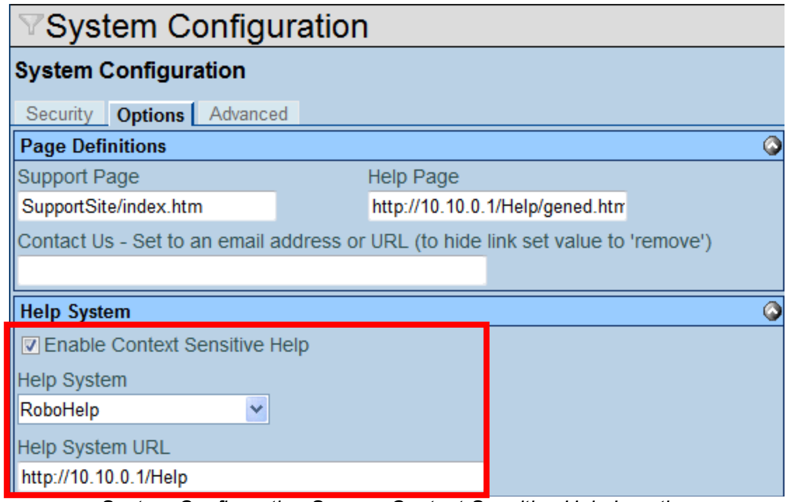
To configure the help available through the **Help** link and question mark button :

1. Go to **Synergy SIS > System > Setup > System Configuration**.
2. Click the **Options** tab.
3. To make the Edupoint help available through the Help link: In the **Help Page** box, type the location of the help files on the web server. Include the URL or IP address, the folder that you created for Installing Help, above, and the file name gened.htm.
   Example:
   `http://192.168.150.114/Help/gened.htm`



System Configuration Screen, Help Location

4. To make the Edupoint help available as context-sensitive help through the question mark button:
   a. In the **Help System** section, check the **Enable Context Sensitive Help** box.
   b. In the **Help System** list, click **RoboHelp**.
   c. In the **Help System URL** box, type the location of the help files on the web server. Include the URL or IP address and the folder that you created for Installing Help, above.
      Example:
      `http://192.168.150.114/Help`



System Configuration Screen, Context-Sensitive Help Location

5. Click the **Save** button at the top of the screen.

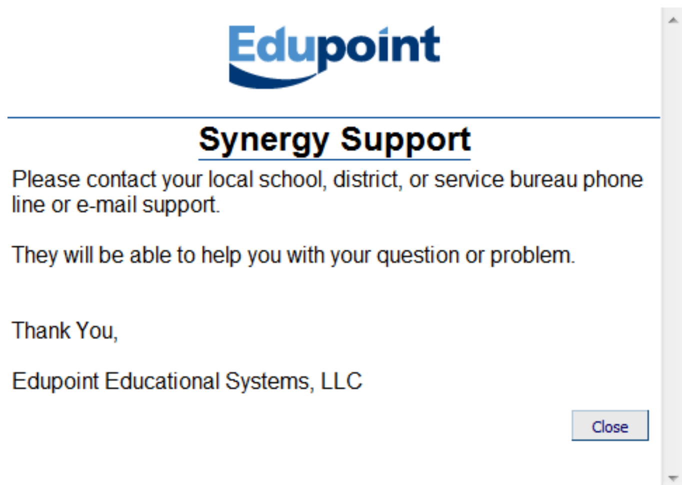
You can substitute your own help for the help provided by Edupoint by entering the appropriate locations.

SUPPORT PAGE

Synergy SIS offers a support page that users access by clicking the **Support** link at the top of any screen.

Support Link

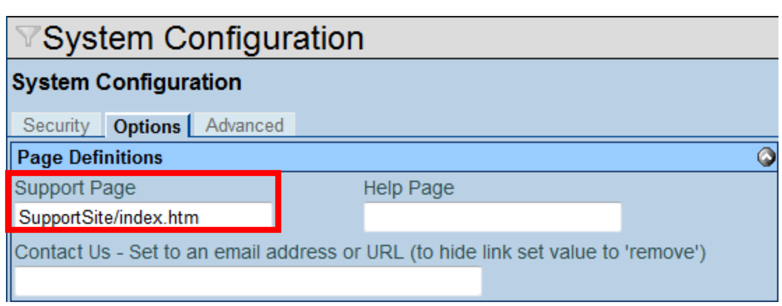
The default support page directs users to contact their internal help desk for assistance.



Default Support Page

To create a custom support page:

1. Create the custom page using any HTML editor, and save it to the default Synergy SIS website on every web server in the district.
   It is recommended to name the page something other than Support.htm, to avoid having to recopy it to each web server after each Synergy SIS upgrade.
2. On **Synergy SIS > System > Setup > System Configuration**, click the **Options** tab.
3. In the **Support Page** box, type the name (and location if needed) of your page.

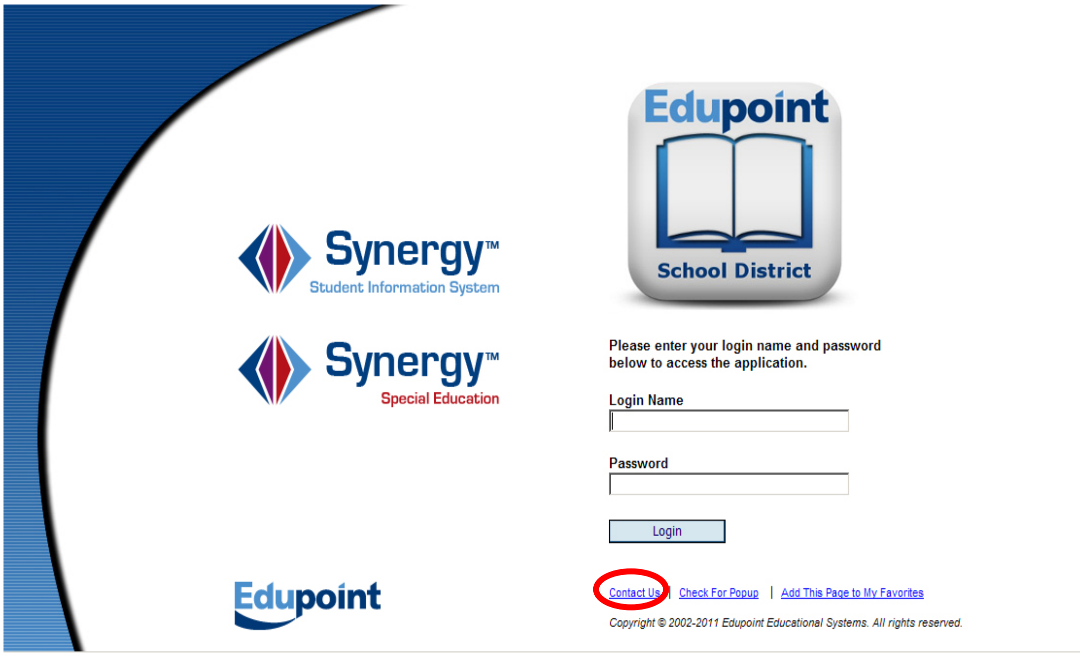


System Configuration Screen

4. Click the **Save** button at the top of the screen.

CONTACT US LINK

By default, a **Contact Us** link is offered at the bottom of the login page.



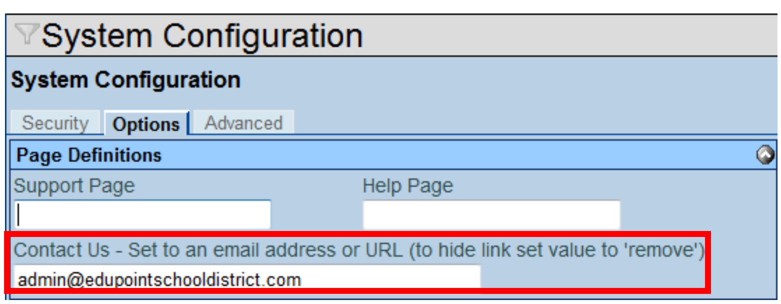
Login Page

This link opens an email message, addressed to support@edupoint.com, in the computer's default email application.

You can configure the link to send email to a different address, to display a web page, or not to appear at all. Remember, if using ParentVUE and StudentVUE software, that parents and students can access the same **Contact Us** link.

To change the behavior of the **Contact Us** link:

1. On **Synergy SIS > System > Setup > System Configuration**, click the **Options** tab.
2. Do one of the following:
   - To change the address to which the link sends email, type the new address in the **Contact Us** box.



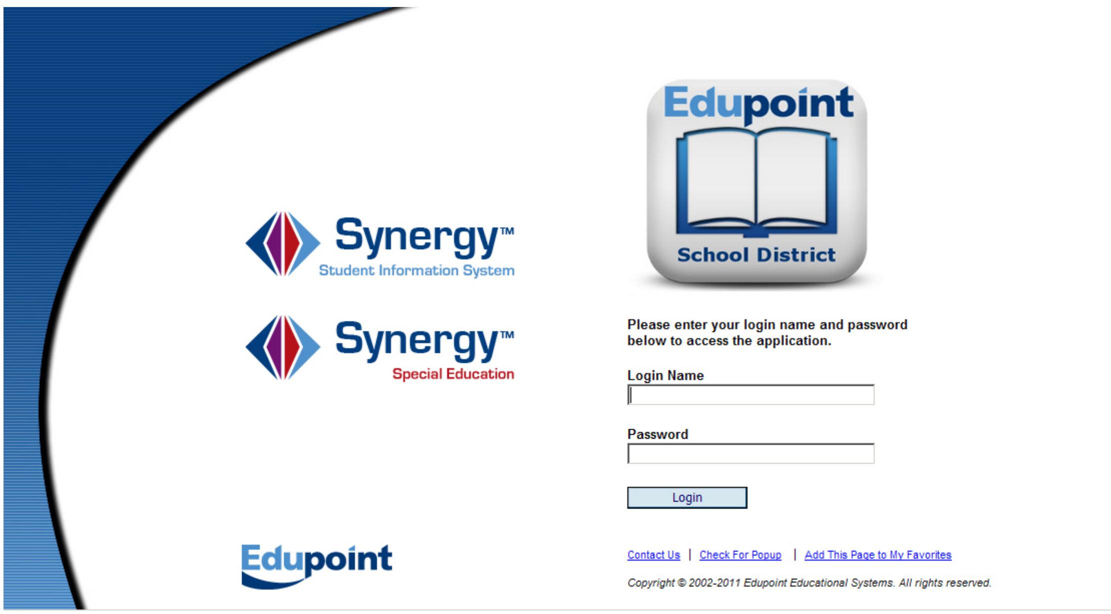
System Configuration Screen

- To make **Contact Us** a link to a web page, type the page's URL in the **Contact Us** box.
- To remove the link from the login page, type the word *remove* in the **Contact Us** box.

3. Click **Save** at the top of the page.

LOGIN PAGE

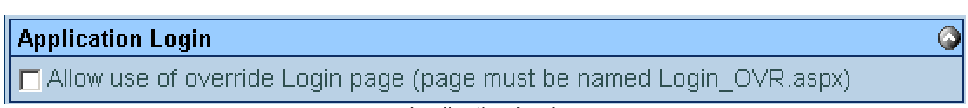
By default, Synergy SIS offers the login page shown below.



Logon Page

To create a custom login page for the district:

1. Create a copy of the current login page, **Login.aspx**, found in the root of the web server. This ensures that the necessary code will be included in the custom page.
2. Modify the format of the login.aspx page using any ASP editor such as the free Visual Studio Express from Microsoft.
3. Save the new page as **Login_OVR.aspx**.
4. Copy the new page to the root of every web server.
5. On **Synergy SIS > System > Setup > System Configuration**, click the **Options** tab.
6. In the **Application Login** section, check the **Allow use of override Login page** box.



Application Login

Chapter Six: SCANNING

This chapter covers:

- ► Overview of Scanning
- ► Installing the Scanning Software
- ► Scanning the Sheets
- ► Managing the Scan Sheets

OVERVIEW OF SCANNING

If all teachers do not have easy access to a computer to record grades or attendance, printed “bubble” sheets can be generated from Synergy SIS and the results scanned into Synergy SIS. The steps in the scanning process are:

1. Attendance and/or grading sheets are printed from Synergy SIS onto pre-printed forms. Synergy SIS supports several pre-printed formats. The printing process is described in the *Synergy SIS – Attendance Administrator Guide* and the *Synergy SIS – Grading Administrator Guide*.

Sample Pre-Printed Form

2. Teachers record attendance or grades on the sheets.
3. A special OMR (optical mark recognition) scanner is installed on a computer.
4. The Synergy SIS Scanning software is installed on the computer attached to the scanner.
5. The sheets are scanned and the information recorded in Synergy SIS.

Currently, Synergy SIS supports the following scanners:

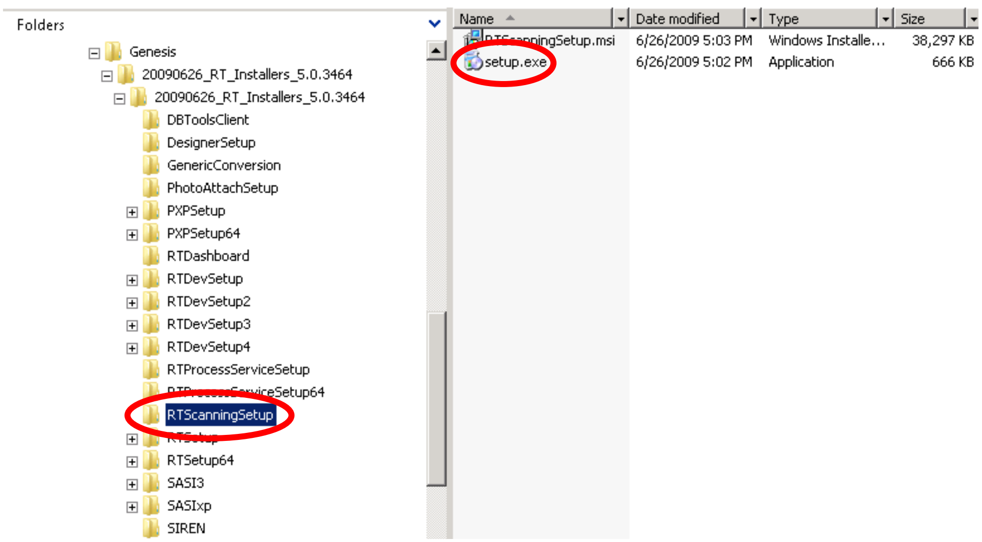
- 5000i
- EZData
- OpScan iNSIGHT 2
- OpScan iNSIGHT 4
- OpScan 2
- OpScan 3
- OpScan 4 or 4U
- OpScan 5 or 6
- OpScan 7 or 8
- OpScan 10
- OpScan 21
- OpScan 9010M or 9020M

If the district’s scanner is not on this list, contact Edupoint for assistance. More scanners are added to this list regularly.

INSTALLING THE SCANNING SOFTWARE

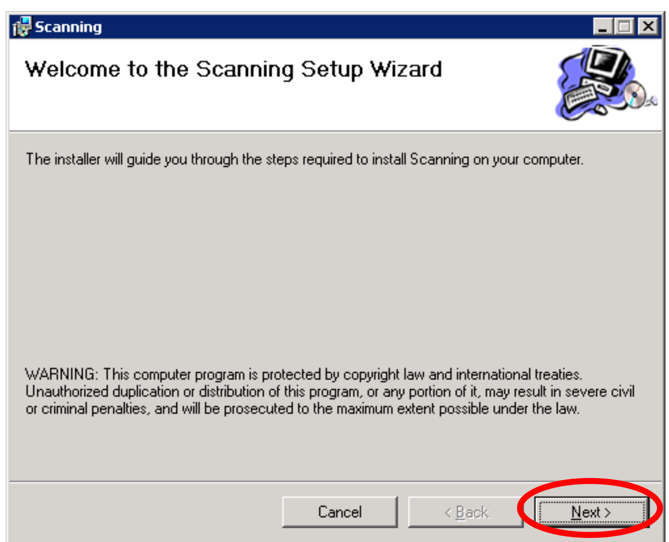
The scanning software must be installed on the computer that is attached to the scanner. To install the scanning software:

1. Download the zip file containing the latest Synergy SIS release to the scanning computer.
2. Extract the files from the zip file.
3. In the extracted release folder, find the folder titled **RTScanningSetup**. In that folder, double-click the Setup.exe file. The setup wizard opens.



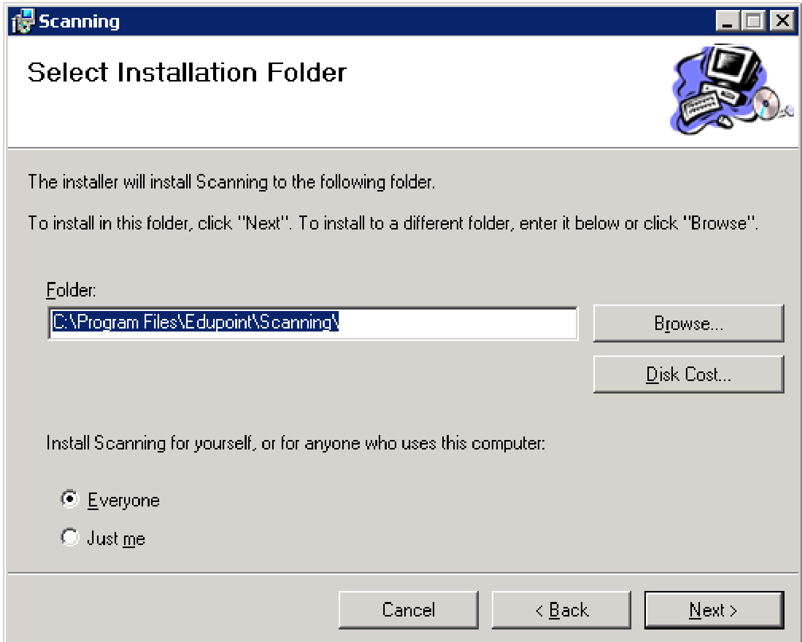
RTScanningSetup Folder

4. Click the **Next** button to begin the installation.



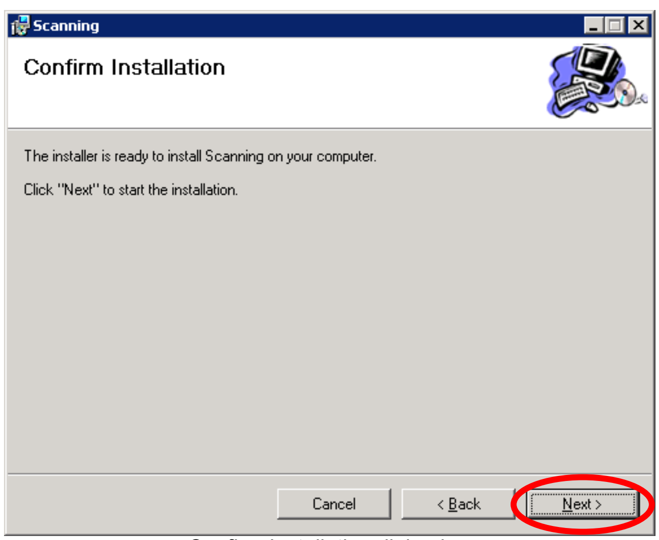
Welcome to the Scanning Setup Wizard dialog box

5. Change the installation **Folder**, if desired.



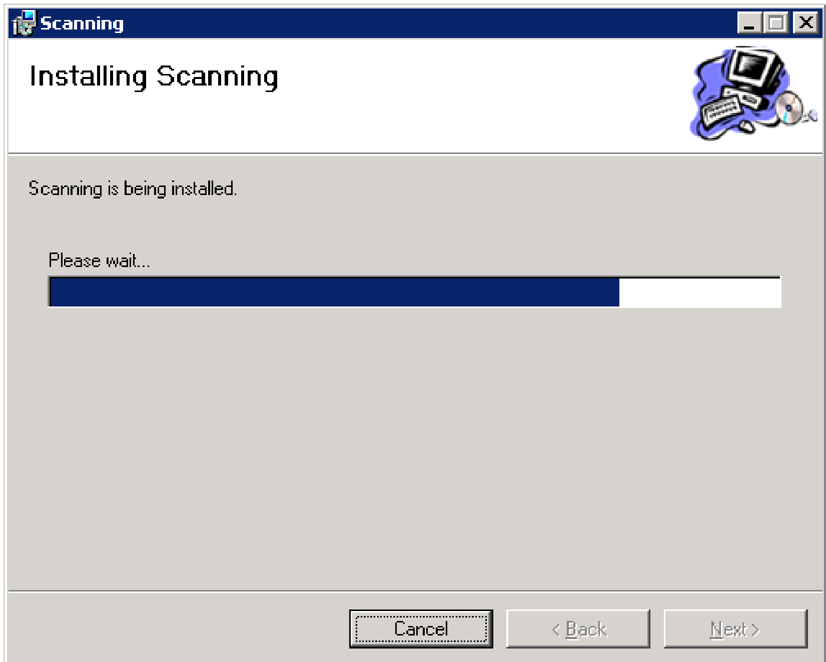
Select Installation Folder dialog box

6. To install the software so that all users can use it, click the **Everyone** option, or to make the software available only for the current user, click **Just me**.
7. Click the **Next** button.
8. In the **Confirm Installation** dialog box, click the **Next** button.



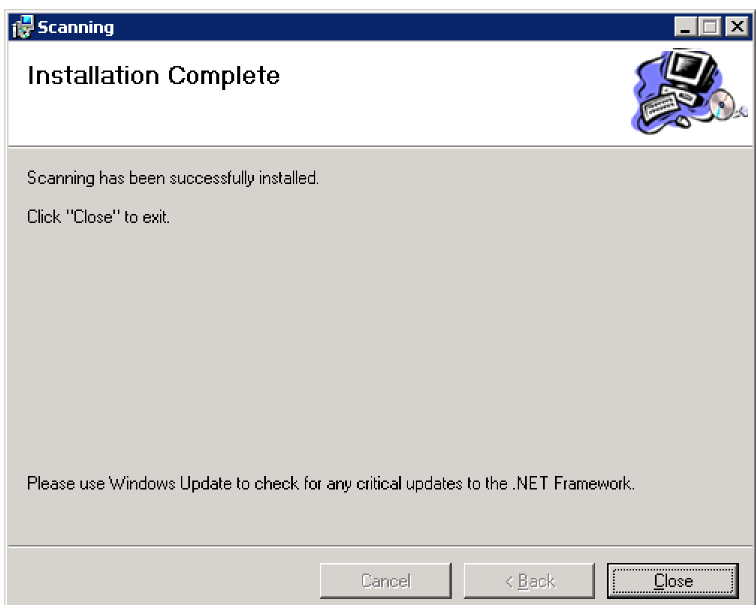
Confirm Installation dialog box

The Installing Scanning dialog box shows the progress of the installation.



Installing Scanning dialog box

9. In the **Installation Complete** dialog box, click the **Close** button.

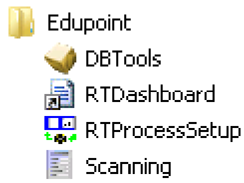


Installation Complete dialog box

SCANNING THE SHEETS

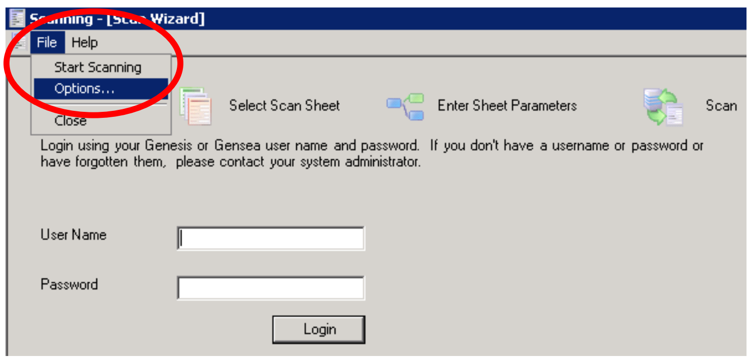
To scan sheets:

1. Click **Start**, **All Programs**, **Edupoint**, and **Scanning**.



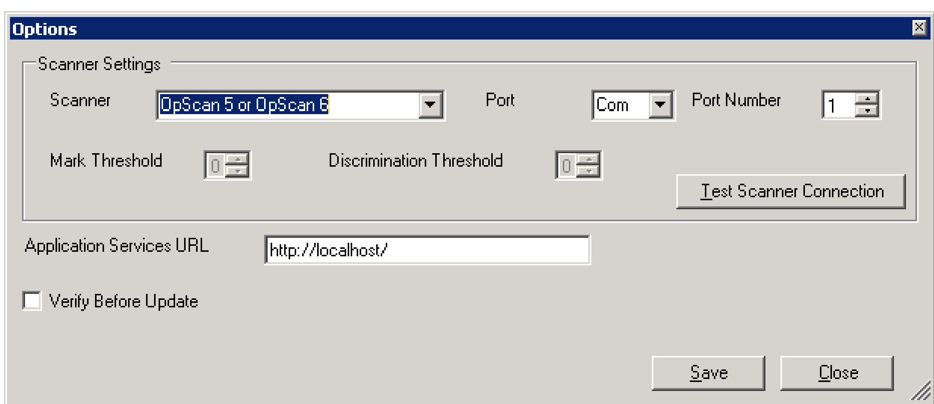
Edupoint Folder

2. The first time the software is started, the scanner settings must be configured. To set up the software, click the **File** menu and select **Options**.



File Menu

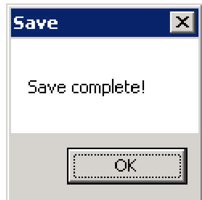
3. In the Options dialog box, select the type of scanner used from the **Scanner** list. Also select the **Port** and **Port Number** used to connect the scanner. Click the **Test Scanner Connection** button to verify the scanner is connected.



Scanning Options

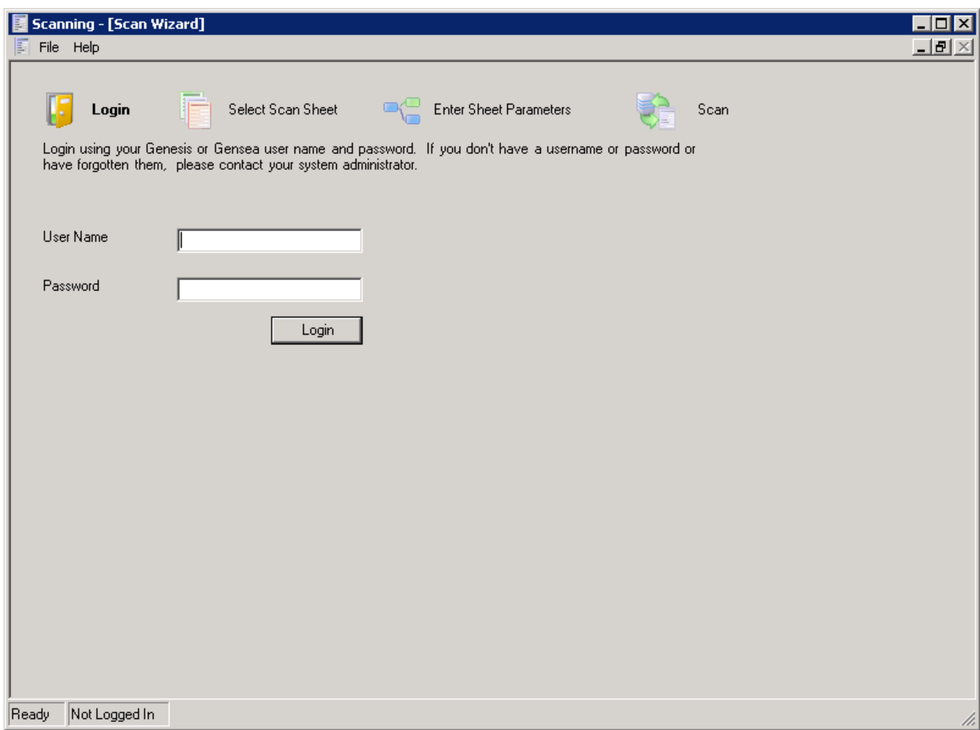
4. If after testing the scan sheets the marks are not being recognized correctly, adjust the **Mark Threshold** and the **Discrimination Threshold** to optimize mark recognition. Mark Threshold controls how dark the mark must be to register, and the Discrimination Threshold controls how it determines if the mark is valid (an X versus a blacked-in spot).
5. Enter the URL for the Synergy SIS web server in the **Application Services URL** box.

6. The box **Verify Before Update** is only for use by Edupoint staff and should not be checked.
7. Click the **Save** button to save the changes to the options.
8. When the options have been saved, the **Save** message box appears. Click **OK** to close the message box.



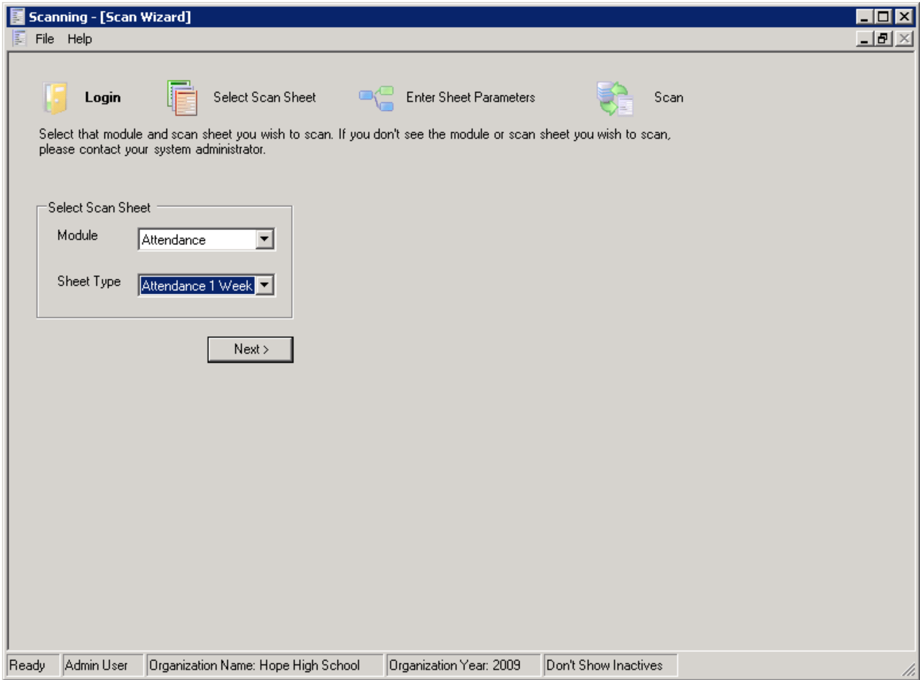
Save Confirmation Message Box

9. Click the **Close** button to close the Options dialog box and return to the main screen.
10. Enter a Synergy SIS **User Name** and **Password**, and click the **Login** button. This Synergy SIS user must have Update access to the records that are scanned (attendance or grading). The current focus of this account is also used to access the records.



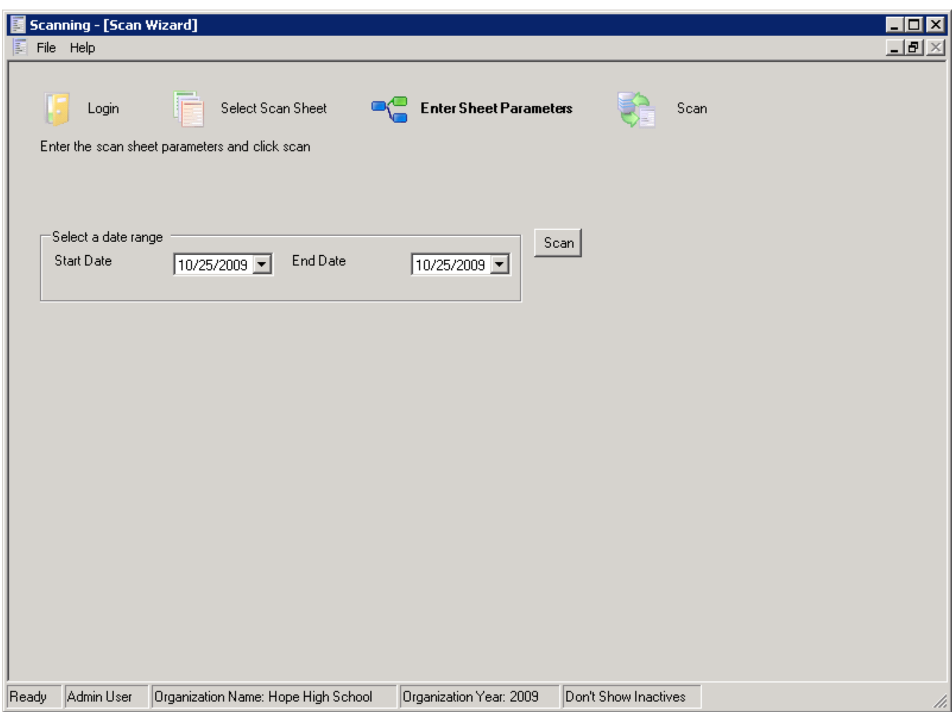
Logging in to the Scanning Software

12. Note the current user name, organization and year in focus, and active/inactive students in focus is displayed at the bottom of the window.



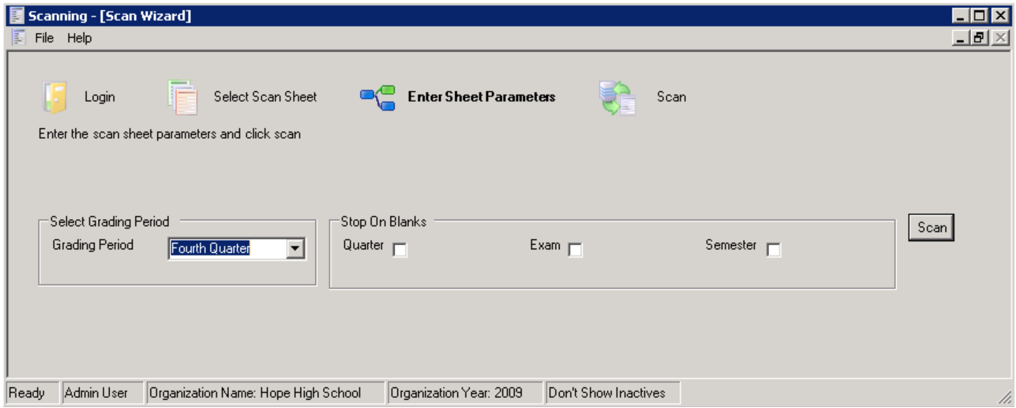
Select Scan Sheet

13. Under **Select Scan Sheet**, select the **Module** to be scanned and the **Sheet Type**, and click the **Next** button.
14. For Attendance sheets, select the **Start Date** and **End Date** of the range of dates.



Enter Sheet Parameters, Attendance

15. For Grading sheets, select the **Grading Period** to be scanned. To stop the scan if a particular mark has not been filled in, check the mandatory marks in the **Stop On Blanks** section.



FiEnter Sheet Parameters, Grading

16. Place the sheets in the scanner and click the **Scan** button.

Note – Information from Attendance scan sheets does not overwrite existing absence codes in Synergy SIS. However, information from Grading scan sheets does overwrite any marks already in Synergy SIS.

You can add new students to an Attendance scan sheet by writing their names on blank lines at the bottom of the sheet. If a new student has been added, the user is prompted to select the student from a list of newly enrolled student in Synergy SIS when the Attendance sheet is scanned. New students may NOT be added to a Grading scan sheet.

If the student has been marked both Tardy and Absent, the Tardy overrides the Absence and only the Tardy reason is recorded.

If the marks made on the scan sheet cannot be read by the scanner, a box opens to ask the user what action to take. The mark can be ignored, a value selected, or the scan cancelled.

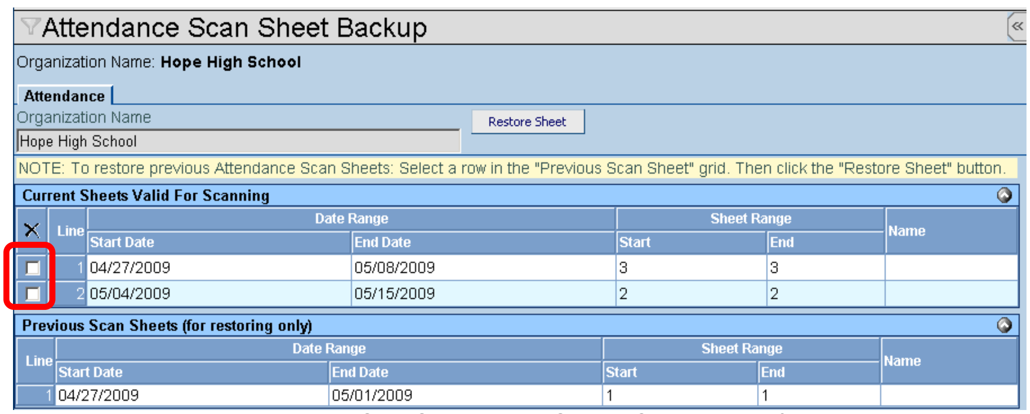
MANAGING THE SCAN SHEETS

You create and print scan sheets on **Synergy Sis > Attendance > Scanning > Attendance Sheet Creation** and **Synergy Sis > Grading > Scanning > Grading Sheet Creation**. See the *Synergy SIS – Attendance Administrator Guide* and *Synergy SIS – Grading Administrator Guide* for details.

Once the scan sheets have been created or printed, each set of sheets can be deleted or restored. Deleted sheets are no longer valid for scanning and will not be scanned. Restored sheets are previously deleted sheets that are now valid for scanning again.

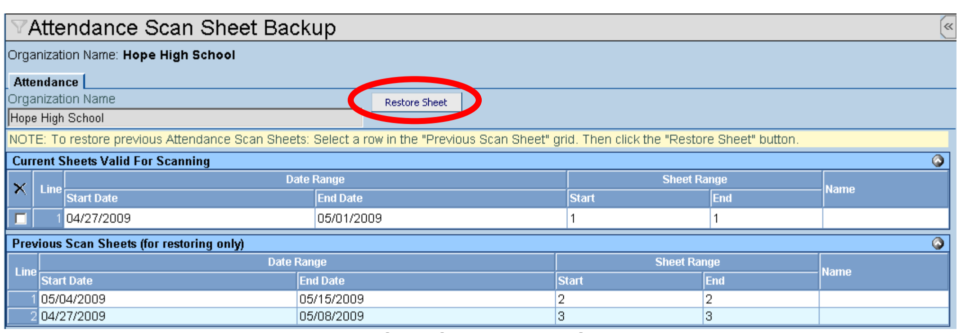
To manage the Attendance sheets:

1. Go to **Synergy SIS > System > Scanning > Attendance Scan Sheet Backup**.
2. Find the sheets for a particular organization using either the Scroll buttons or Find mode.



Attendance Scan Sheet Backup Screen, Organization Info

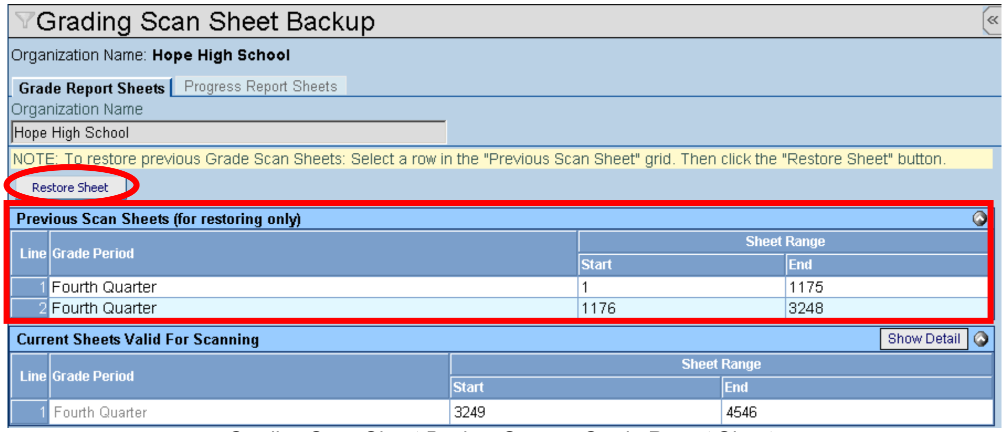
3. To mark a sheet as completed and locked, check the box in the **X** column next to the sheet in the **Current Sheets Valid For Scanning** section and click the **Save** button at the top of the screen. It moves to the **Previous Scan Sheets** section.
4. To restore a sheet so it can be rescanned, click the sheet in the **Previous Scan Sheets** section and click the **Restore Sheet** button.



Attendance Scan Sheet Backup Screen, Restoring

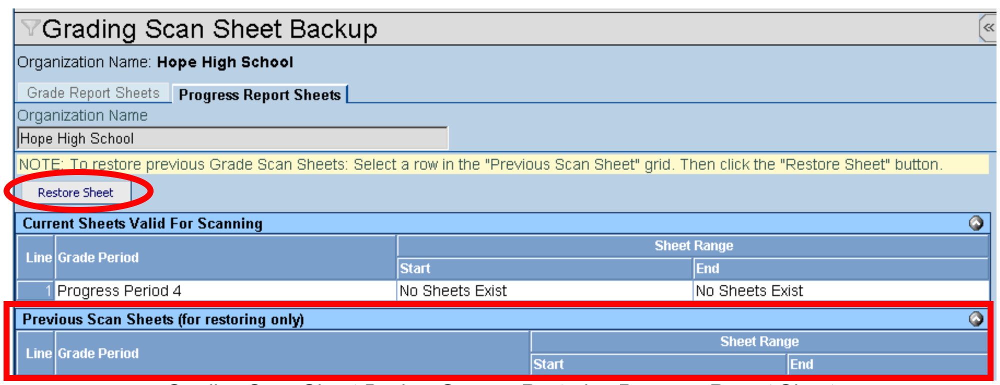
To manage the Grading sheets:

1. Go to **Synergy SIS > System > Scanning > Grading Scan Sheet Backup**.
2. Find the sheets for a particular organization using either the Scroll buttons or Find mode.



Grading Scan Sheet Backup Screen, Grade Report Sheets

3. To restore a Grade Report sheet so it can be rescanned, click the sheet in the **Previous Scan Sheets** section and click the **Restore Sheet** button.
4. To restore a Progress Report sheet so it can be rescanned, click the **Progress Report Sheets** tab.



Grading Scan Sheet Backup Screen, Restoring Progress Report Sheets

5. Click the sheet in the **Previous Scan Sheets** section and click the **Restore Sheet** button.

Note – Active grade sheets cannot be deleted or marked as inactive.

Chapter Seven: CUSTOMIZING SCREENS

This chapter covers:

- ► Adding Custom Fields
- ► Changing Screens
- ► Customizing Quick Launch Abbreviations
- ► Modifying Existing Fields (Properties)
- ► Changing A Report Interface
- ► Defining Screen Events
- ► Creating Custom Rules
- ► Creating Rule Processing Groups
- ► Customizing Messages
- ► Auto Populate

Synergy SIS offers several options for customizing screens. Screens can be rearranged, fields added or removed, and tabs created or modified. Existing fields can be modified. Districts can customize what happens when a record is added or modified. For the Synergy SE software, the lookup values for several fields can be customized.

If you need to customize Synergy SIS even further, you can purchase the underlying Synergy Technology software that creates all screens and tables. Additional information about the Synergy Technology software can be found in the *Synergy Technology Guide*.

Before any customization is started, it is important to understand the concepts underlying the Synergy SIS software. The data is stored in several hundred tables in the SQL-based database (either SQL Server or Oracle). These tables and their associated fields/columns are mapped to an XML schema referenced by the user interface.

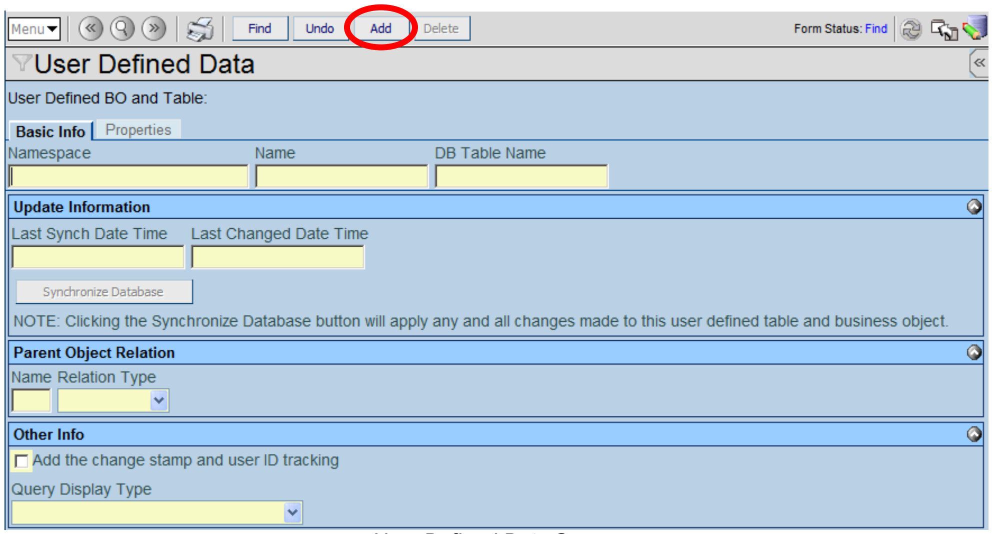
This XML schema refers to several terms as outlined below:

- **Namespace** – a namespace indicates the type of data being collected. Synergy SIS uses 4 primary namespaces, but each of these is further broken down into sub-namespaces. The primary namespaces are **K12** for student data, **Revelation** for system data, **UD** for user-defined data, and **ZClient** for client-specific data created by Edupoint. Each of these primary namespaces is subdivided into more unique namespaces such as K12.AddressInfo. User-defined fields are always assigned to the UD namespace.
- **Name** – the name of the collection of information, which generally is the same of the name of the screen or grid on which the information is displayed.
- **Business Object** – represents the unique combination of namespace and name, generally expressed as K12.Student. Each business object generally maps to a table in the SQL database. Each table is named similarly to the business object. For example, EPC_STU is the underlying table for the K12.Student namespace. However, the prefixes of the database tables within the overall K12 namespace are further broken down between EPC (Synergy SIS), EP (Synergy SE) and GB (Gradebook). Revelation tables use the REV prefix, UD tables use the UD prefix, and ZClient tables use the ZClient prefix. Gradebook business objects cannot be selected at this time, and a new user-defined object cannot be attached to an existing user-defined object.
- **Property** – the individual pieces of information within the business object. These map to the field/column of the database table such as PermNum.

ADDING CUSTOM FIELDS

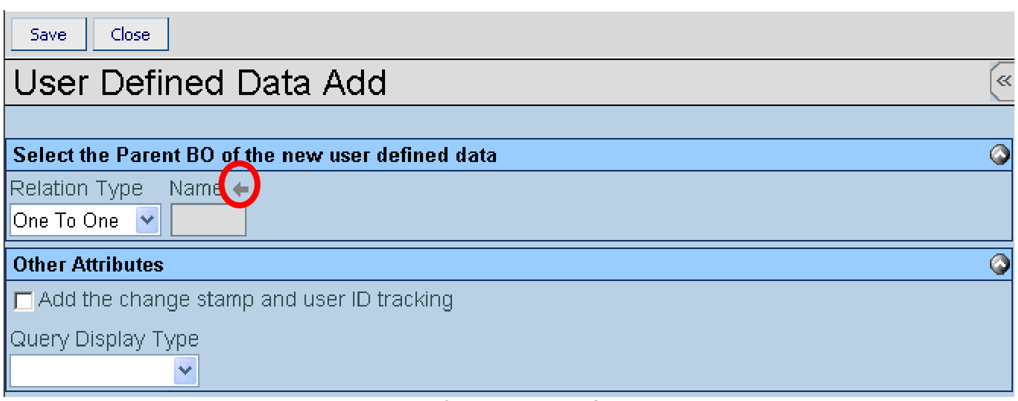
A custom field must be created before it can be added to a screen. To create a custom field:

1. Go to **Synergy SIS > System > Data and Views > User Defined Data**, and click the **Add** button at the top of the screen.



User Defined Data Screen

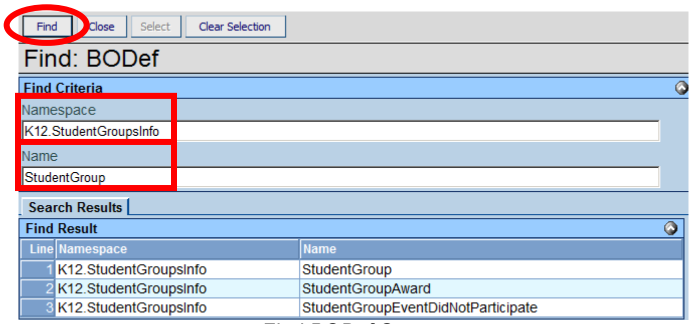
2. In the **Relation Type** list, select whether the new table that will hold the new field has a **One To One** or **One to Many** relationship with the Parent Business Object. It can also be set as a **Master** with a new **Object Name** and **DB Table Name**, with no relationship to an existing business object.



User Defined Data Add Screen

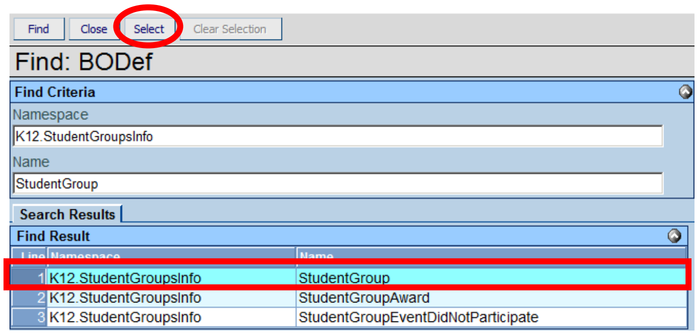
3. For both the One to One and One to Many types, click the gray arrow to select the name of the Parent Business Object (BO) to which the new field will be added. The Parent Business Object should be the screen to which the field will be added. For example, if the field will be added to the Student Group screen, select the K12.StudentGroupsInfo.StudentGroup business object.

   Enter all or part of the **Namespace** and/or **Name** of the business object, and click the **Find** button at the top of the screen. It is easiest to search by name, as that generally is the same as the name of the screen, but without the spaces between the words. For example, the Student Groups screen name is StudentGroup.



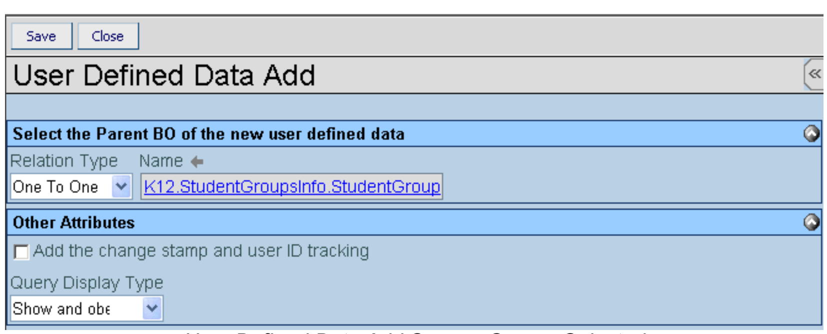
Find BODef Screen

4. In the **Find Result** grid, click the business object to which the field will be added, and click the **Select** button. Existing user-defined objects cannot be selected, and each object can be selected only once. For example, if the StudentGroup already has user-defined data attached to it, another instance cannot be created.



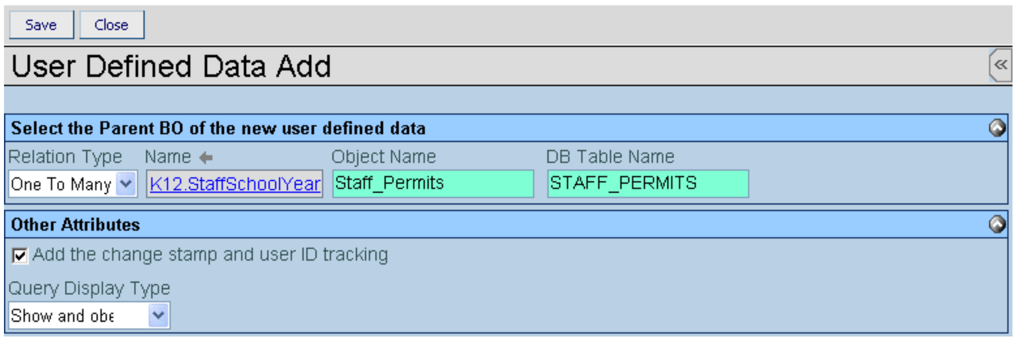
Find BODef Screen, Item Selected

5. In the **User Defined Data Add** screen, check the box labeled **Add the change stamp and user ID tracking** if you want to track who changes the data in the new field, and when.

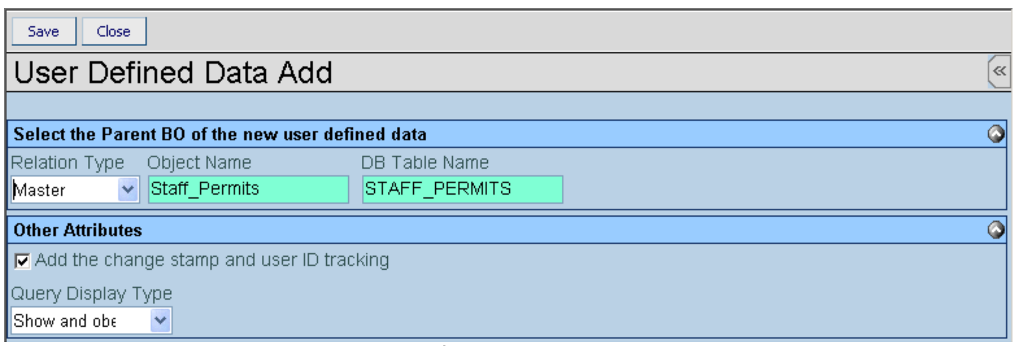


User Defined Data Add Screen, Screen Selected

6. In the **Query Display Type** list, select how the new data will be displayed. To have the data appear on the screen the same as other Synergy SIS fields, select **Show and obey BO rules**. To have the data not show on the screen, select **Never show**. If the data should show only when editing the screen and not when adding a new record, select **Do not show on initial query launch**.
7. For both the One To Many and Master types, also enter an **Object Name** and **DB Table Name**. When saved, the Object Name will be prefaced by UD to indicate it is a User-Defined Business Object, and the DB Table Name will be prefaced with UD_. The Object Name is what will appear in Synergy SIS, and the DB Table Name is the name of the table created in the Synergy SIS database to store the data.

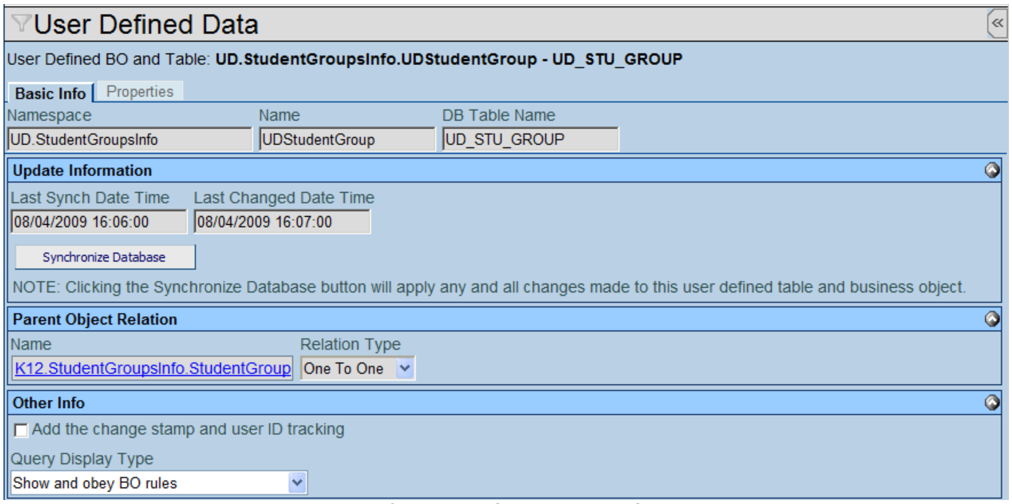


User Defined Data Add, One To Many



User Defined Data Add, Master

8. Click the **Save** button at the top of the screen. This creates a table attached to the selected screen called UD_VIEW_NAME_ABBREVIATION, and a new namespace and name with the same name as the original but prefixed with UD. The details of this business object and table now show in the **User Defined Data** screen. For example, K12.StudentGroupsInfo.StudentGroup becomes a **namespace** of UD.StudentGroupsInfo, with a **name** of UDStudentGroup and a **DB table name** named UD_STU_GROUP.



User Defined Data Screen, Table Created

9. When the business object is created, the object is added to the XML schema, but the table is not added to the database. Data cannot be entered until the new business object information is added to the database. Click the **Synchronize Database** button to add the table to the database. This synchronization must occur each time a change is made to the screen so that the underlying table is updated. The date and time of the last database synchronization is displayed as well as the last time the object definition was changed. If the **Last Changed Date Time** is later than the **Last Synch Date Time**, the database needs to be synchronized.

10. The **Parent Object Relation** section displays the Parent Business Object selected when the table was created, and the relationship between the parent business object and the user-defined object. This information cannot be modified. A one-to-one relation type (the default) means that only one user-defined record can be created for each parent business object record.

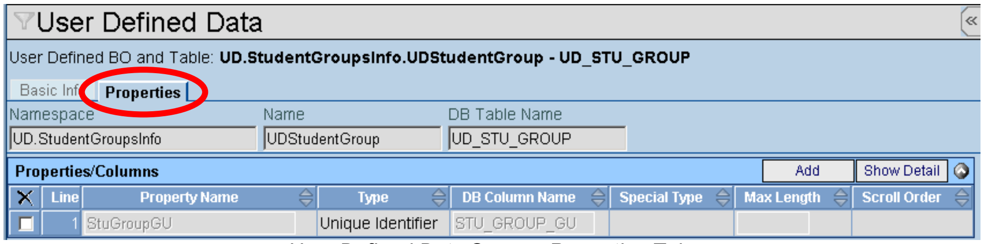
11. Only the **Add the Change Stamp and User ID Tracking** and **Query Display Type** can be changed after the object has been created. If these values change, be sure to click the **Save** button at the top of the screen.

Deleting

To delete a new business object, click the **Delete** button at the top of the screen.

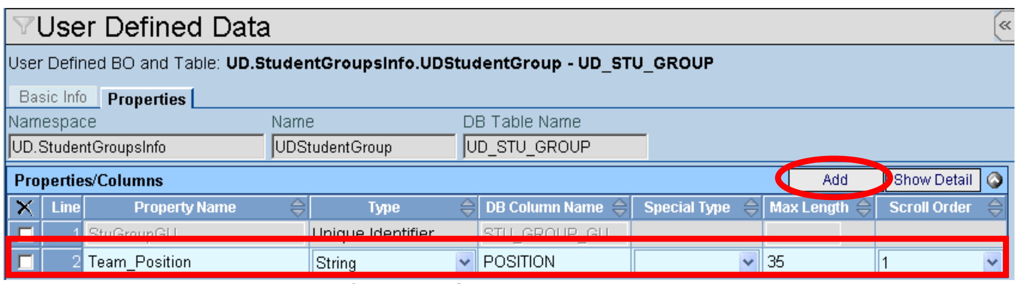
Once the business object and table are created, the next step is to add the fields for the data, referred to as properties, to this table and business object. To add the fields:

1. Click the **Properties** tab.



User Defined Data Screen, Properties Tab

2. By default a unique identifier property is automatically added to track the data. If **Add the Change Stamp and User ID Tracking** is checked, the properties to track this information are automatically added. Properties added by default cannot be modified or changed.
3. Click the **Add** button, and a new line appears. Each new line represents a property that can be added to a screen or tab.

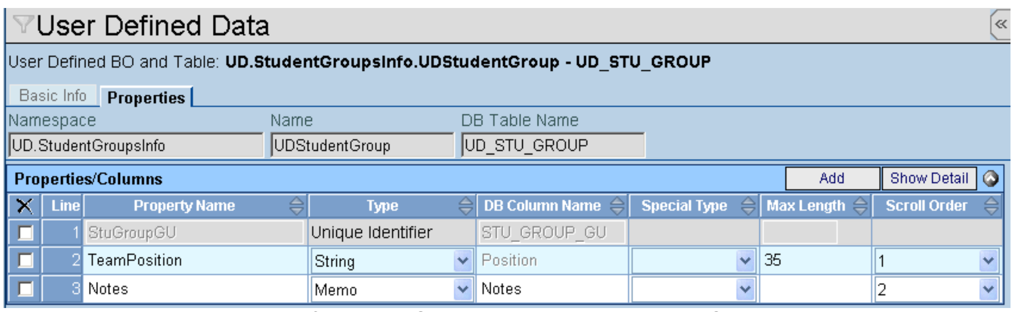


User Defined Data Screen, Properties Tab, Adding

4. Enter the name of the property as it will appear in the screen in the **Property Name** column. The name cannot contain spaces or any special characters other than an underscore.
5. Select the type of field to add in the **Type** column. The common types used are **String**, which creates a single-line text field; **Memo**, which creates a multi-line text field; **Numeric**, which creates a field that holds numbers; and **Date**, which stores dates. Other types include **Checkbox**, to add a yes or no value displayed as a check box; **Currency**, for monetary amounts; **DateTime**, to record a date and time; **Lookup**, to reference one of the built-in lookup tables; **Phone**, to store phone information; **SSN**, for social security numbers; **Time of Day**, to store only the time; and **Unique Identifier**, which stores a unique value that cannot be present in any other record in the table.
6. Enter the name of the field as it will appear in the database in the **DB Column Name** column. The name cannot contain spaces or any special characters other than an underscore.

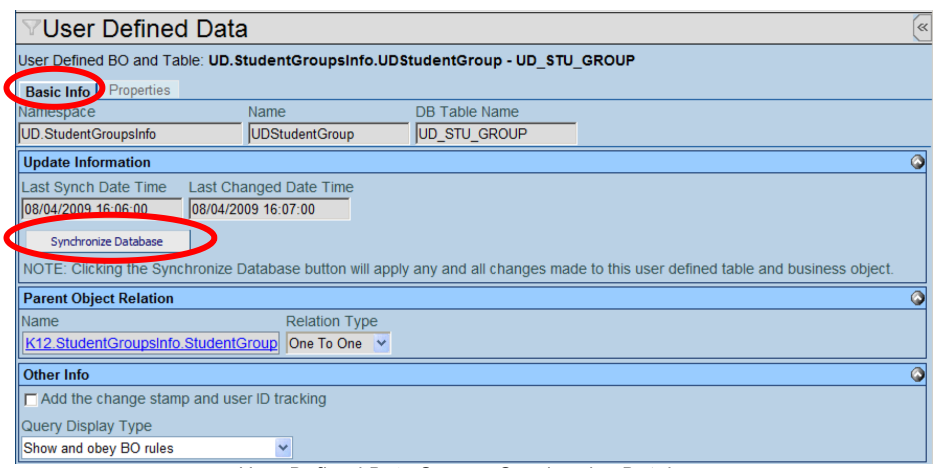
> **Note** – If adding a Unique Identifier-type of field, the DB Column Name must end in _GU.

7. You can define the new field as containing a system-generated value, such as the date the record was modified, by selecting an option in the **Special Type** column. Special Types include **Add Date**, the date the record was created; **Add User ID**, the user ID of the person who created the record; **Change Date**, the date the record was last modified; **Change User ID,** the user ID of the person who last changed the record; **None**, the default; **Numeric Year**, the current year in four digits; **Organization ID**, the ID of the organization (school) to which the record is attached, so that the record can be linked to information from the organization when querying; **Organization Year GU**, to add a link to the organization and year for reporting purposes; and **Year GU**, to add a link to the school year.
8. Enter the maximum length of the data in the field in the **Max Length** column.
9. Use the **Scroll Order** column to select the order in which the fields appear.
10. Click the **Save** button at the top of the screen. Additional fields can be created by clicking the **Add** button for each new field.



User Defined Data Screen, Properties Tab, Fields Created

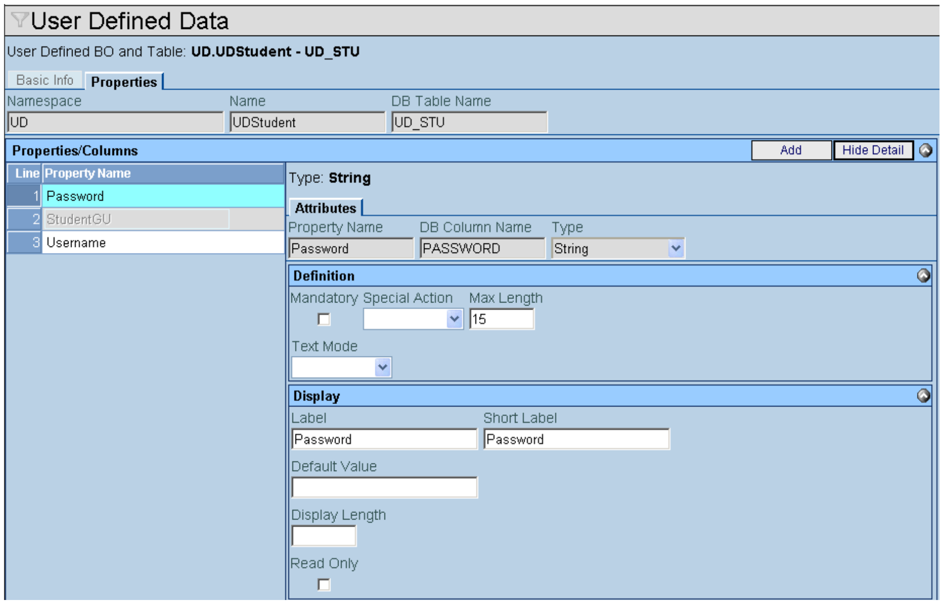
11. After all fields are created, go back to the **Basic Information** tab and click the **Synchronize Database** button. This saves the new fields to the database so they can be used in screens.



User Defined Data Screen, Synchronize Database

After the new fields are saved, additional information can be customized. Except for lookup tables, most of the field types have one or more of the attributes listed in the example below for the String type. For the Lookup type, see the next page. To customize the field:

1. On the **Properties** tab, select the field and click the **Show Detail** button.

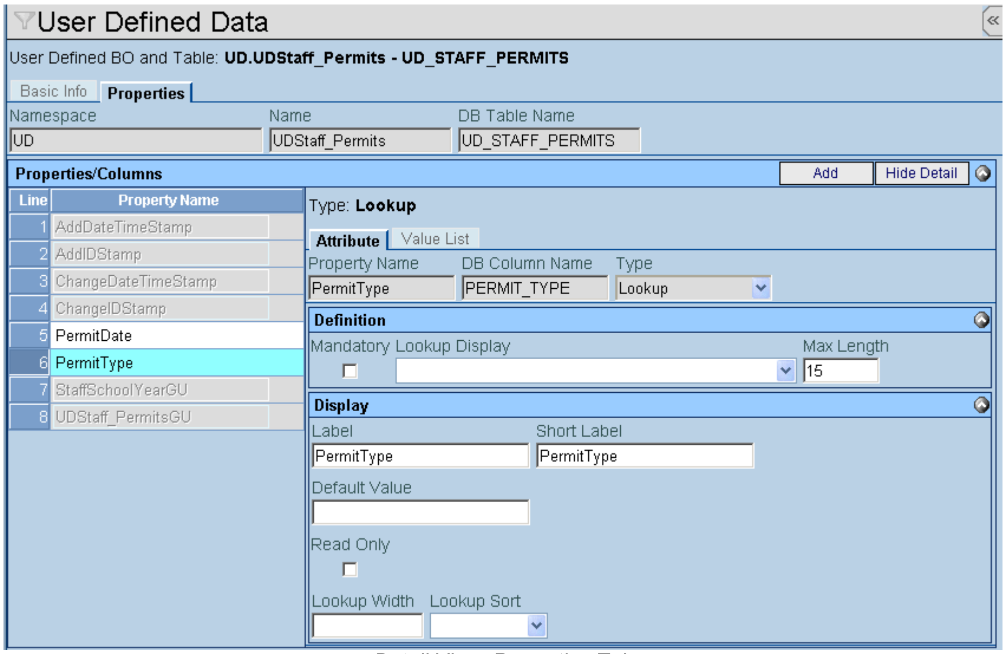


Detail View, Properties Tab

2. Check the **Mandatory** box to require that data be entered in the field before it can be saved.
3. Select **For Insert Only** from the **Special Action** list to make the field available on the Add screens only of the screen selected. To specify no special action, select **None** (default).
4. The maximum number of characters that can be entered in the field can be specified in the **Max Length** box.
5. Select the **Text Mode** from the list. Single Line allows only one line of text, where Multi Line allows multiple lines. Static enters a default value that can't be changed, and Password stores the text in the database in an encrypted format.
6. The **Label** is what is normally is displayed on the screen. By default, the text for the label is also set as the **Short Label**; however, a different Short Label may be entered for times when space is constrained for the screen.
7. To set a value for the field that is entered automatically when a new record is created, but that can be changed by the end user, enter the **Default Value**.
8. Enter the number of characters to be displayed in the data entry box for the field in the **Display Length** box. This does not have to be the same as the Max Length number, but it probably should be at least as long as that or longer to have all of the characters display on the screen.
9. To set the field so it cannot be changed by the user, check the **Read Only** box.
10. Click the **Save** button at the top of the screen to save the changes. To return to the main screen, click the **Hide Detail** button.

When customizing a lookup field:

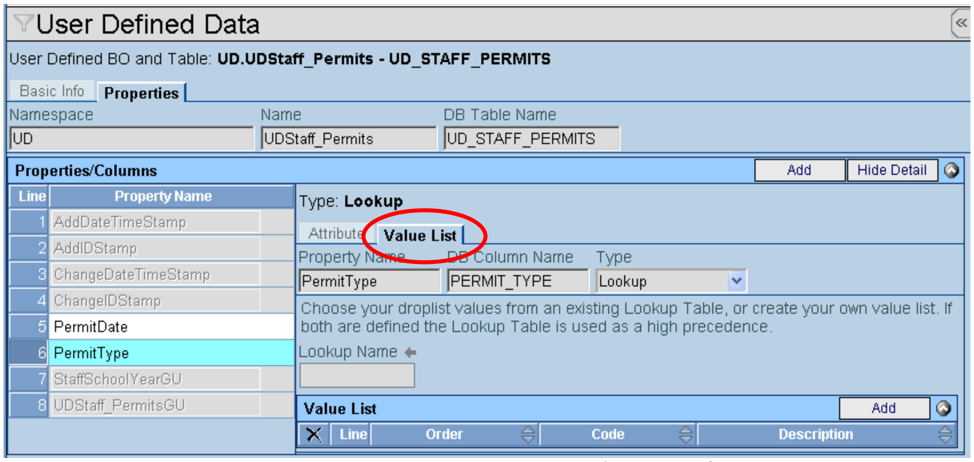
1. On the **Properties** tab, select the field and click the **Show Detail** button.



Detail View, Properties Tab

2. Check the **Mandatory** box to require that data be entered in the field before it can be saved.
3. In the **Lookup Display** list, select whether to display the code or description of the values. **Code – Code and Description** stores the code in the field, but shows the Code and Description when selecting from list. **Code – Code** stores and displays only the code, **Code and Description – Code and Description** stores and displays both, and **Description – Description** stores and displays only the description.
4. In the **Max Length** box, enter the maximum number of characters that can be entered.
5. The **Label** is what is normally is displayed on the screen. By default, the text for the label is also set as the **Short Label**; however, a different Short Label may be entered for times when space is constrained.
6. To set a value for the field that is entered automatically when a new record is created, but that can be changed by the end user, enter the **Default Value**.
7. To set the field so it cannot be changed by the user, check the **Read Only** box.
8. Enter the number of characters to be displayed in the list in the **Lookup Width** box.
9. Choose how to sort the values selected for the Lookup Display in the list from the **Lookup Sort** list. **None** uses the order entered in the lookup table.

10. To enter the items that will be displayed in the list, click the **Value List** tab.



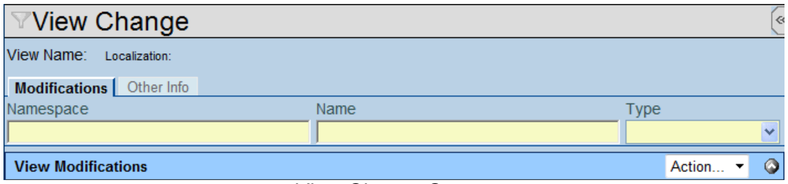
Value List Tab, Properties Detail, User Defined Data Screen

11. To use an existing lookup table listed in the **Lookup Table Definition** screen, click the gray arrow next to **Lookup Name**.
12. To use a new table, click the **Add** button in the **Value List** section.
13. Enter the sort order in the **Order** column, a **Code** for the value, and a **Description**.
14. Repeat steps 12 and 13 as needed.
15. Click the **Save** button at the top of the screen, and click the **Hide Detail** button.

CHANGING SCREENS

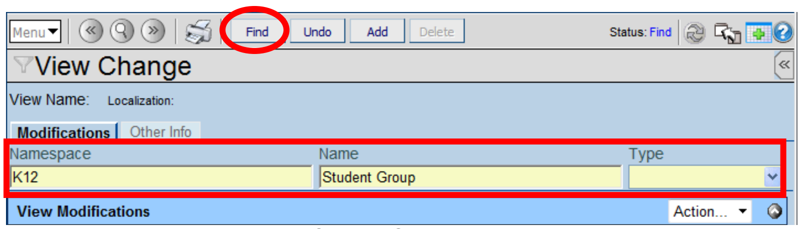
After creating fields and properties, you add them to a screen.

1. Go to **Synergy SIS > System > Data and Views > View Change**.



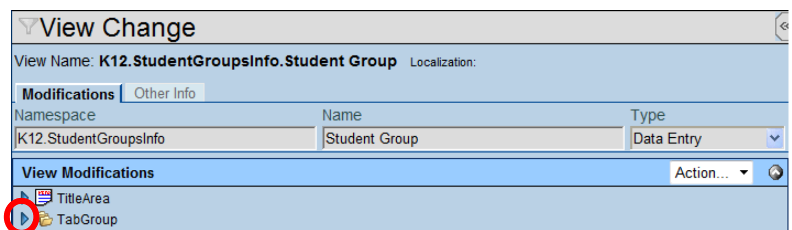
View Change Screen

2. Find the screen to be modified by entering all or part of any of the **Namespace**, **Name**, and **Type**, and clicking the **Find** button. Most namespaces begin with K12, and the name is generally the name of the screen.



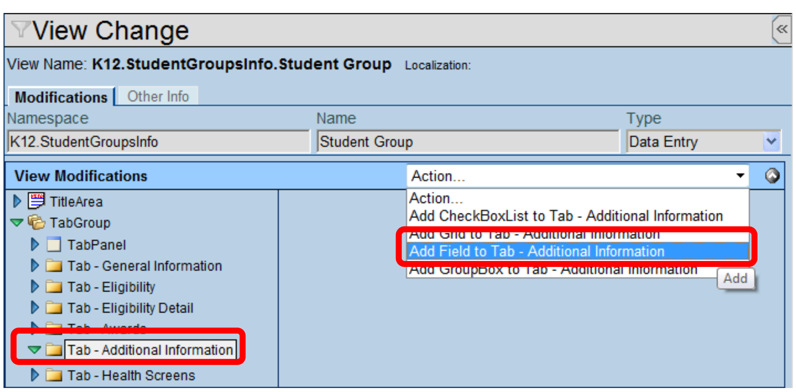
View Change Screen, Finding

3. Use the Previous and Next buttons if needed to find the desired screen.
4. Click the triangle next to **TabGroup** to expand the list of tabs for the screen.



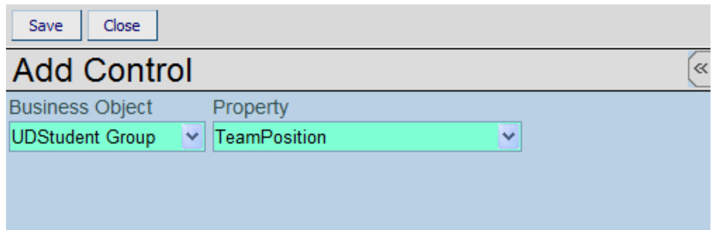
View Change Screen, Student Group

5. Click the **Tab** to which the field should be added, then select **Add Field to Tab** from the **Action…** list.



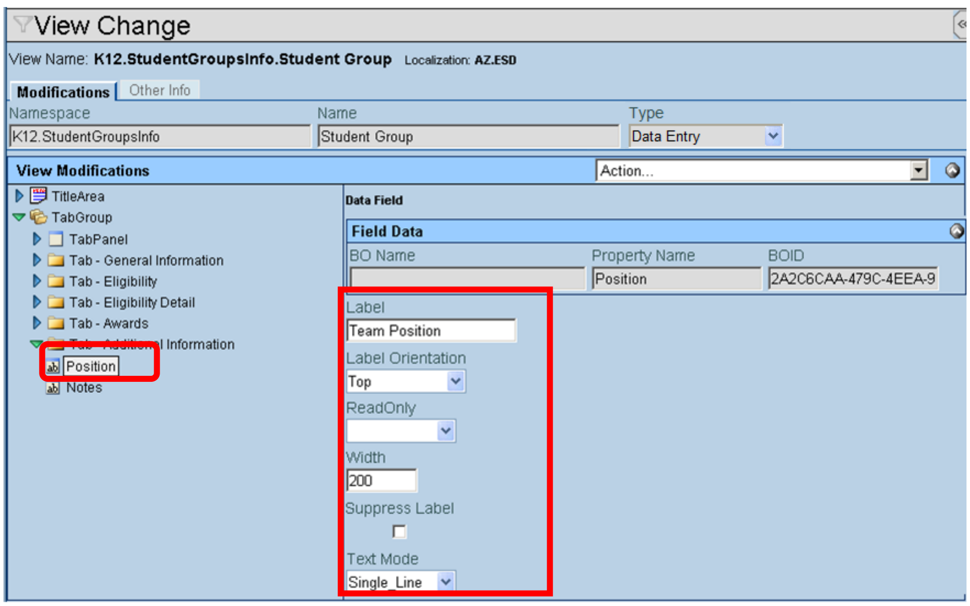
View Change Screen, Adding a Field

6. In the **Add Control** screen, select the name of the **Business Objec**t that was created (it should start with UD), and in the **Property** list, select the name of the field added in the **User Defined Data** screen.



Add Control Screen

7. Click the **Save** button at the top of the screen.
8. Repeat steps 4 through 6 to add additional fields to the tab. Once all the fields have been added, click on the **name of each field** to customize how the field is displayed on the screen.



View Change Screen, Field Data

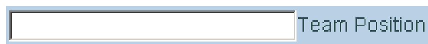
9. Enter the text to be displayed as the name of the field in the **Label** box. This is usually the same as the name of the field in the database. Spaces and special characters are permitted in the label.

10. In the **Label Orientation** list, select where the label should appear in relation to the entry box. The most common choices are **Top** or **Left**.

Left Label Orientation

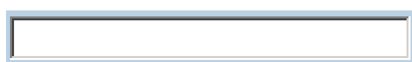
Top Label Orientation

Bottom Label Orientation

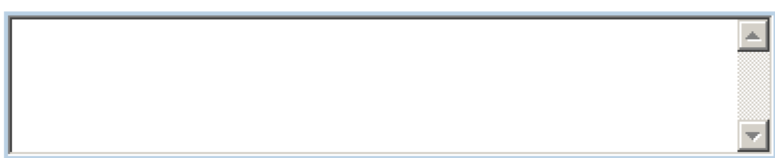


Right Label Orientation

11. To secure the field so that the data can't be changed (useful for system-generated fields such as Date Modified), select **Yes** from the **Read Only** list. Select **No** to allow the data to be changed, or select **Default** to set this automatically based on the type of field. System-generated fields will automatically be set to No, and all others would be set to Yes with the default setting.
12. Enter the display width of the data entry box in the **Width** box. 200 is approximately the width of the Label box shown in the Label Orientation samples above, for example.
13. To show only the data entry box without any label, check the **Suppress Label** box. This may be helpful for system-generated fields.
14. Select the type of box to display for text fields from the **Text Mode** list. **Single Line** shows a single line of text, where **Multi-Line** displays a box where multiple lines can be entered and a scroll bar is attached to the side of the box.



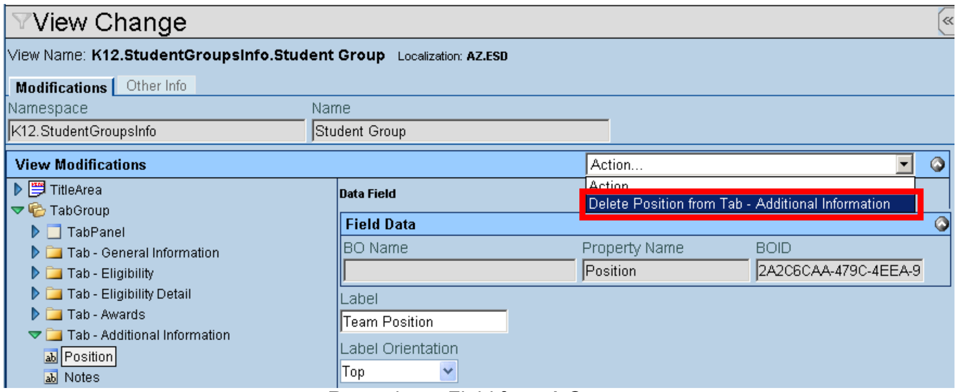
Single Line Entry Box



Multi-Line Entry Box

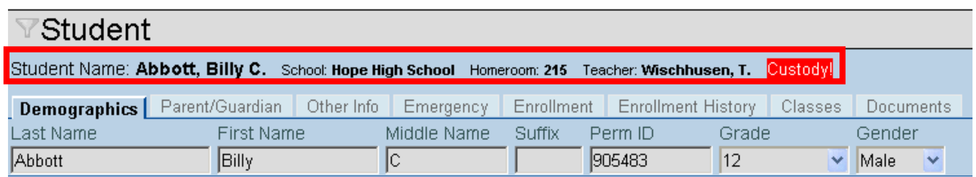
15. Click the **Save** button at the top of the screen.

16. To delete a user-defined field from a screen, click on the name of the field and then select **Delete Field from Tab** from the **Action** list.



Removing a Field from A Screen

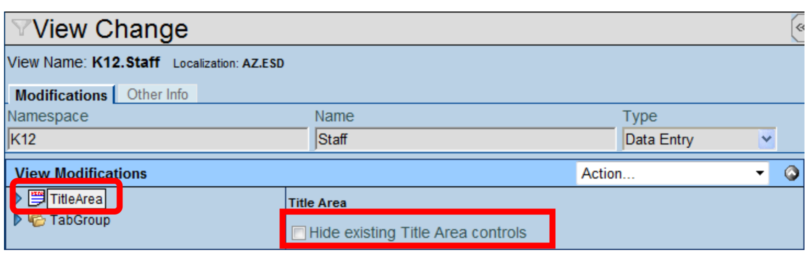
A few other changes can be made to the screens beyond adding a field. Existing tabs can't be deleted, nor can existing properties; however, tabs can be added as well as a box for new fields. The first area that can be customized is the Title Area. The Title Area is the area below the name of the screen, and above the tabs. Generally this area shows key information about the student or section.



Title Area Example

The entire Title Area can be hidden:

1. Click the **Title Area** in the **View Change** screen.

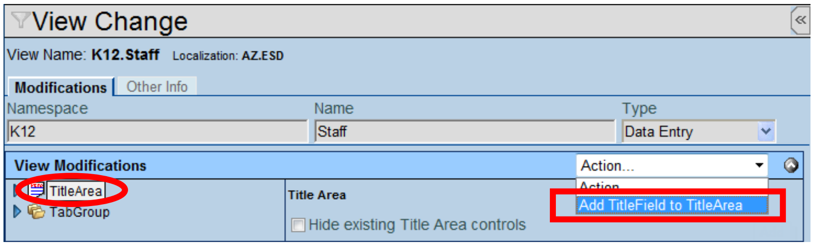


Hiding Title Area

2. Check the **Hide existing Title Area controls** box.
3. Click **Save** at the top of the screen. The entire Title Area no longer appears at the top of the screen.

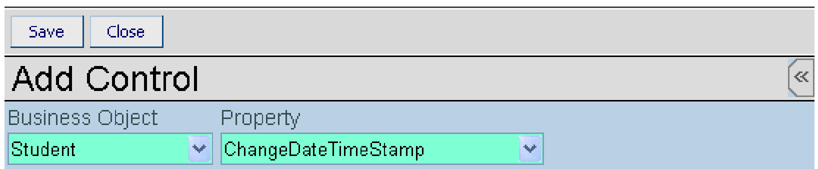
Fields can be added to the Title Area. These should be read-only fields displayed for informational purposes, as the Title Area is not open for data entry. To add a field to the Title Area:

1. Click the **Title Area**.



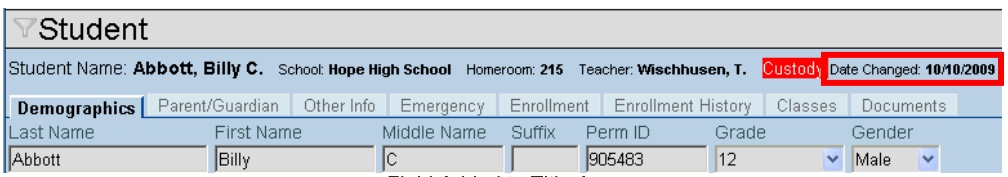
Adding a Field to the Title Area

2. Select **Add TitleField to TitleArea** from the **Action** list.
3. The Add Control screen opens. Select the **Business Object** of the field to add from the list, and then select the **Property**(field) of that object to add.



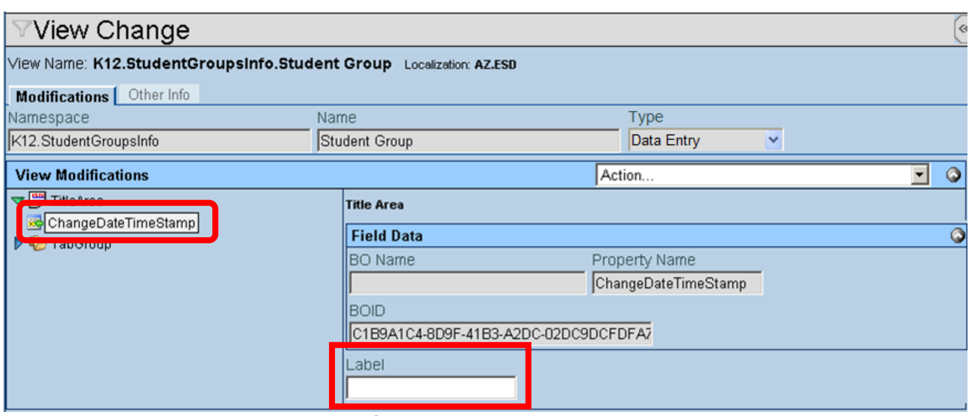
Add Control Screen

4. Click the **Save** button at the top of the screen. The new field will appear at the end of the Title Area.



Field Added to Title Area

5. Once the field has been added, the Label for the field can be modified by clicking on the newly added **field** under the Title Area.

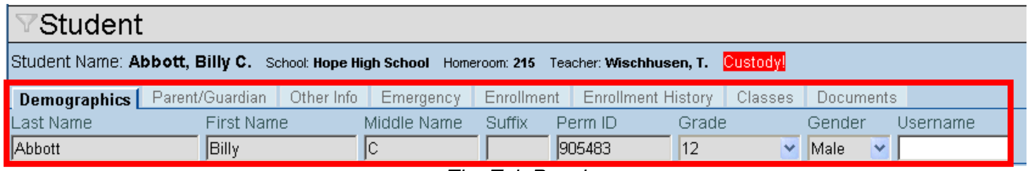


Changing the Field Label

6. Enter the new label in the **Label** box, and click the **Save** button at the top of the screen.

7. To remove a field added to the Title Area, click on the **field name** and then select **Delete Field Name from Title Area** from the **Action** list.

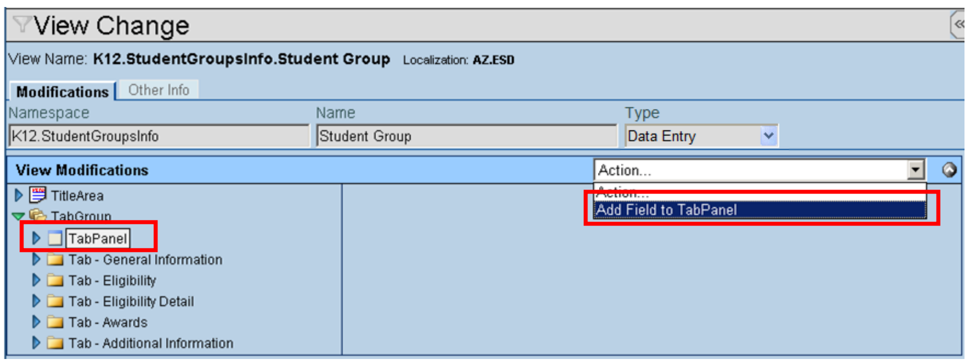
Fields can also be added to the Tab Panel area of a screen. The Tab Panel is the line of information that displays just below the tabs, and the same line of information displays on every tab.



The Tab Panel

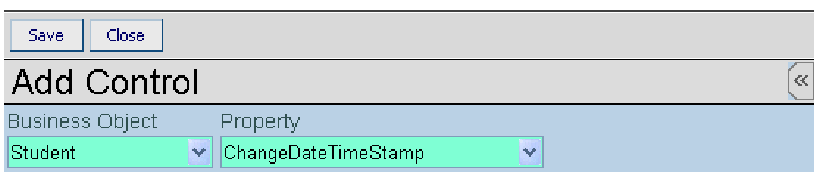
To add a field to the Tab Panel:

1. Click on the **Tab Panel**, and select **Add Field to TabPanel** from the **Action** list.



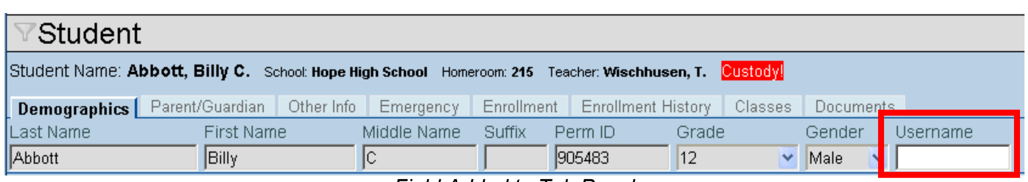
Adding a Field to the Tab Panel

2. The Add Control screen opens. Select the **Business Object** of the field to add from the list, and then select the **Property**(field) of that object to add.



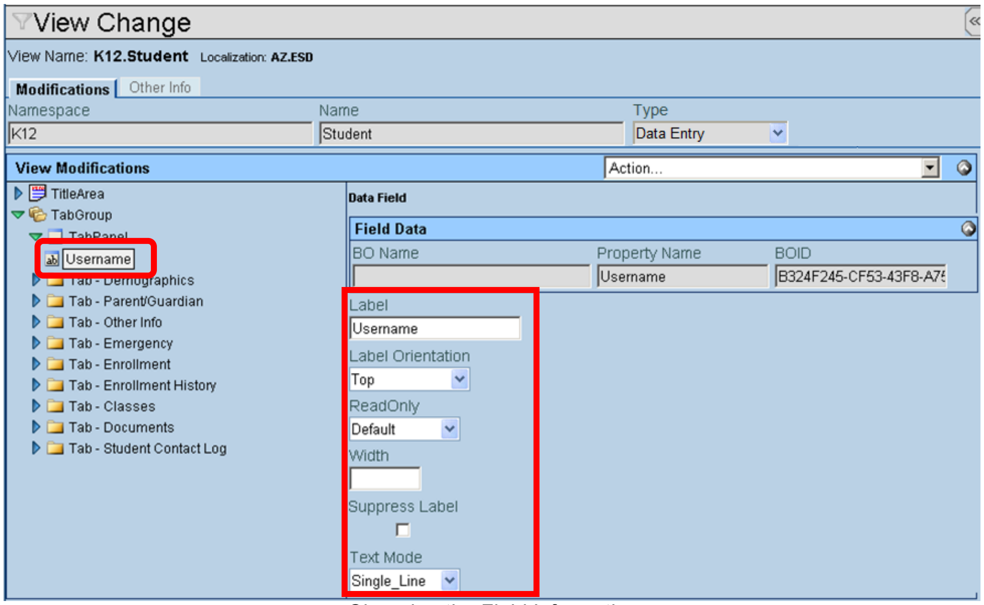
Add Control Screen

3. Click the **Save** button at the top of the screen. The new field will appear at the end of the Tab Panel.



Field Added to Tab Panel

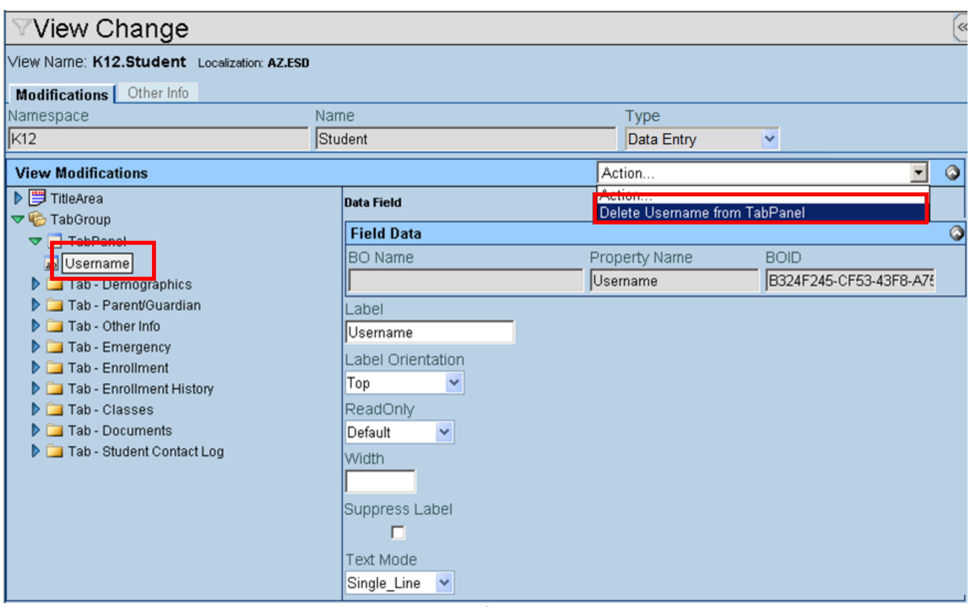
4. Once the field has been added, the attributes of the field can be modified by clicking on the newly added **field** under the Tab Panel.



Changing the Field Information

5. Make any changes to the default settings for the field, and click the **Save** button at the top of the screen. These are the same settings available when adding a field to a tab as outlined previously in this section of the guide.

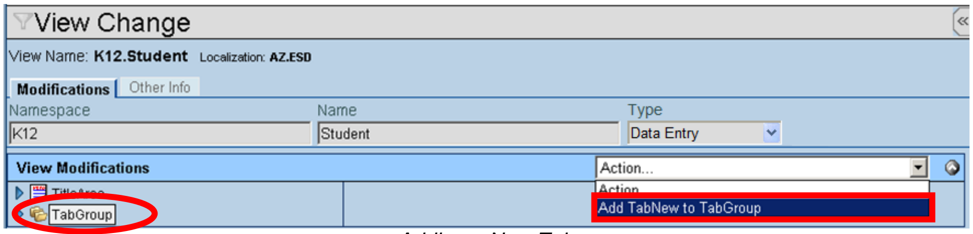
6. To remove a field added to the Tab Panel, click the f**ie**ld name and then select **Delete Field Name from TabPanel** from the **Action** list.



Removing a Field from the Tab Panel

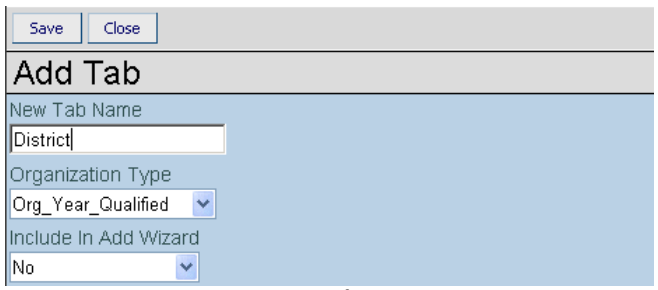
You can add an entire tab to a screen:

1. Click the **TabGroup**, and select **Add TabNew to TabGroup** from the **Action** list.



Adding a New Tab

2. Enter the name for the tab in the **New Tab Name** box.



Add Tab Screen

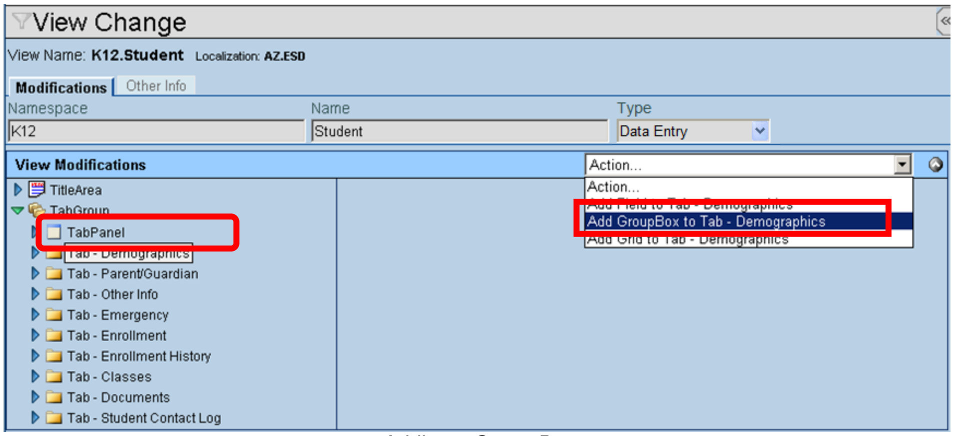
3. If the information on this tab will be specific to the School and Year, select **Org_Year_Qualified** from the **Organization Type** list. Select **Org_Year_Aware** if the data on the tab is shown for the specific year and organization but can be entered anywhere. The **Default** option inherits this setting from the overall View setting.
4. Click the **Save** button at the top of the screen.
5. Add fields to the new tab just the same as for existing tabs, as described previously in this section.

You can add a group box (section) to a screen. Group boxes are logical groupings of fields, contained in a box.

Group Box

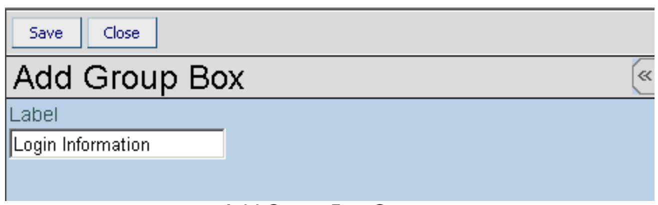
To add a group box to a tab:

1. Click on a tab, and select **Add GroupBox to Tab** from the **Action** list.



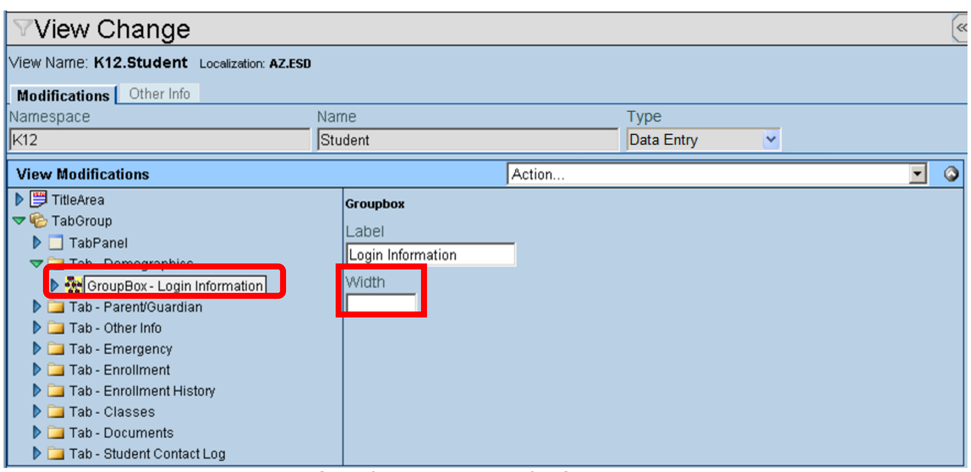
Adding a Group Box

2. Enter the name of the box in the **Label** field, and click the **Save** button.



Add Group Box Screen

3. Specify the width of the box by clicking on its name and entering number of characters in the **Width** box. By default, the box will contract and expand to the width of the screen.



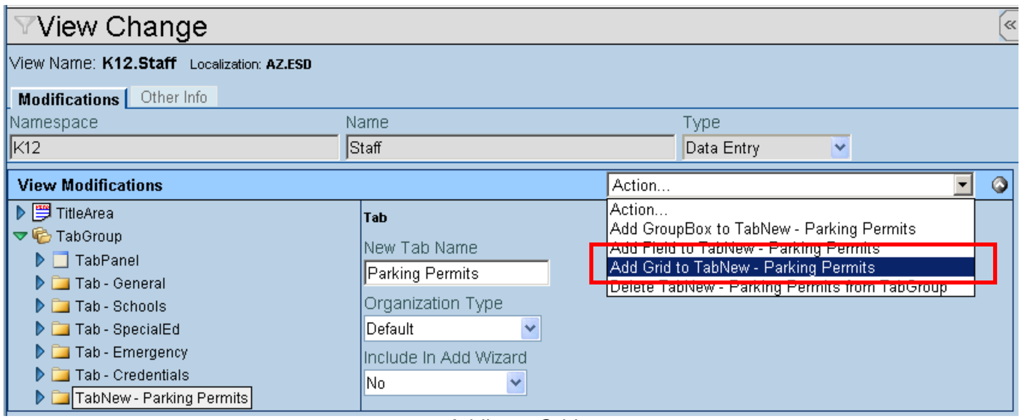
Specifying the Width of a Group Box

4. Add fields by clicking on the name of the **GroupBox** and selecting **Add Field to GroupBox** from the **Action** list.

You can add a grid when there is a one-to-many relationship to the main business object. An example would be a phone number grid, where one student may have many phone numbers.

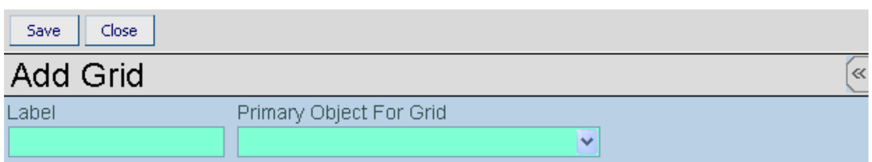
To add a grid:

1. Click a tab or group box, and select **Add Grid to Tab** from the **Action** menu.



Adding a Grid

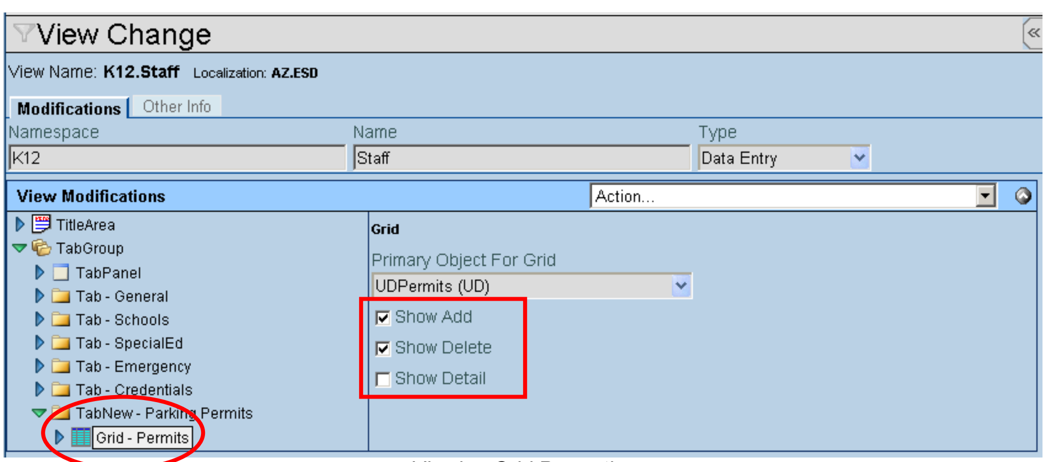
2. Enter a **Label** for the new grid, and select the object to be used for the grid from the **Primary Object For Grid** list. The objects must be in a one-to-many relationship with the selected screen, and can be an existing object or a user-defined object.



Add Grid Screen

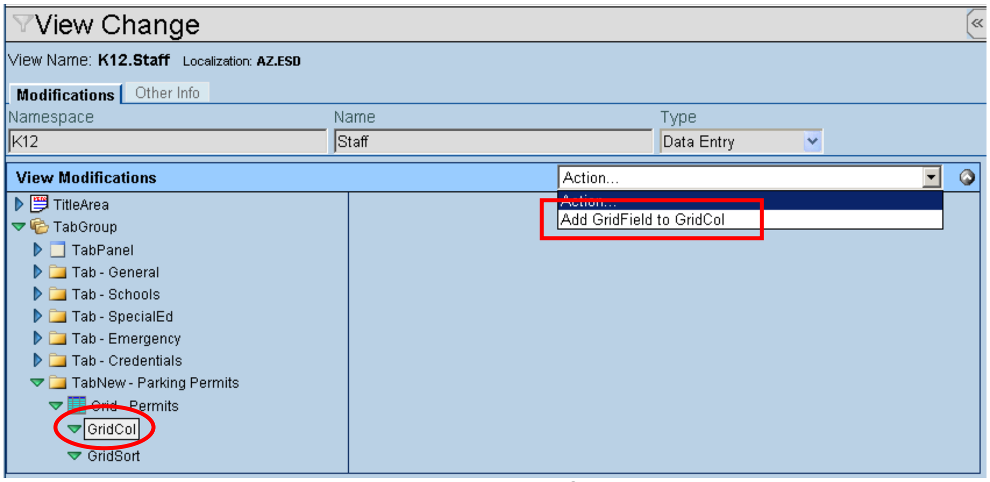
3. Click the **Save** button at the top of the screen.

4. Expand the tab to see the new grid, and click it. By default, an **Add** button and **Delete** column are added to the grid. To add a **Show Detail** button to the grid (for nested grids), check the **Show Detail** box.



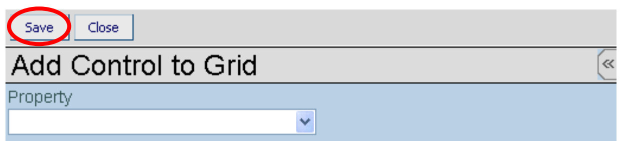
Viewing Grid Properties

5. To add the columns to be displayed on the grid, expand the grid by clicking on the triangle in front of the grid name, click **GridCol**, and select **Add GridField to GridCol** from the **Action** menu.



Adding Fields to a Grid

6. The Add Control to Grid screen opens. Select one of the properties from the object/table assigned to the grid in the **Property** list.

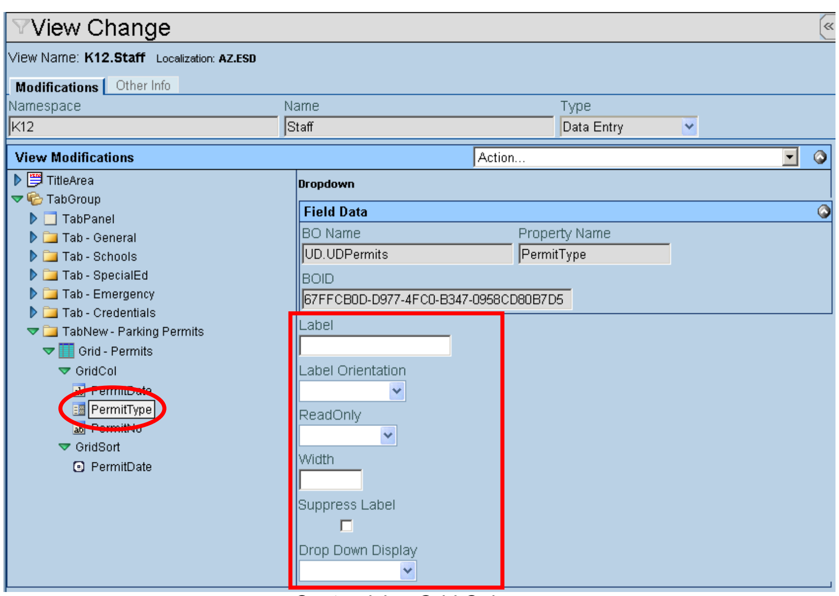


Add Control to Grid Screen

7. Click the **Save** button at the top of the screen.

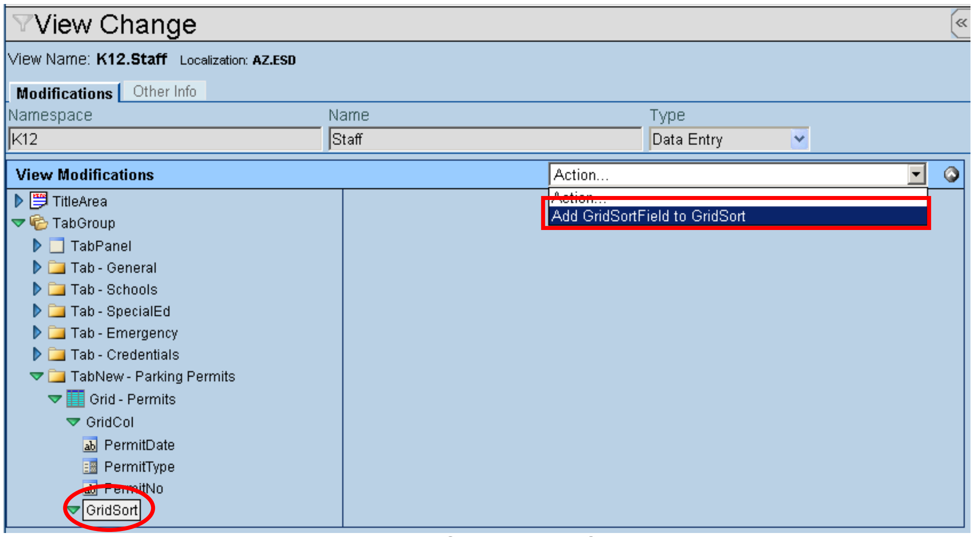
8. Select **Add GridField to GridCol** from the **Action** menu again, and continue adding columns.

9. Once all of the columns have been added, modify the display of the columns by clicking the name of the added column.



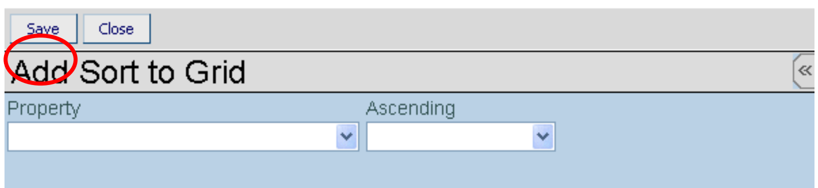
Customizing Grid Columns

10. To specify the order in which records are sorted in the grid, click **GridSort** and select **Add GridSortField to GridSort** from the **Action** menu.



Adding a Sort Field to a Grid

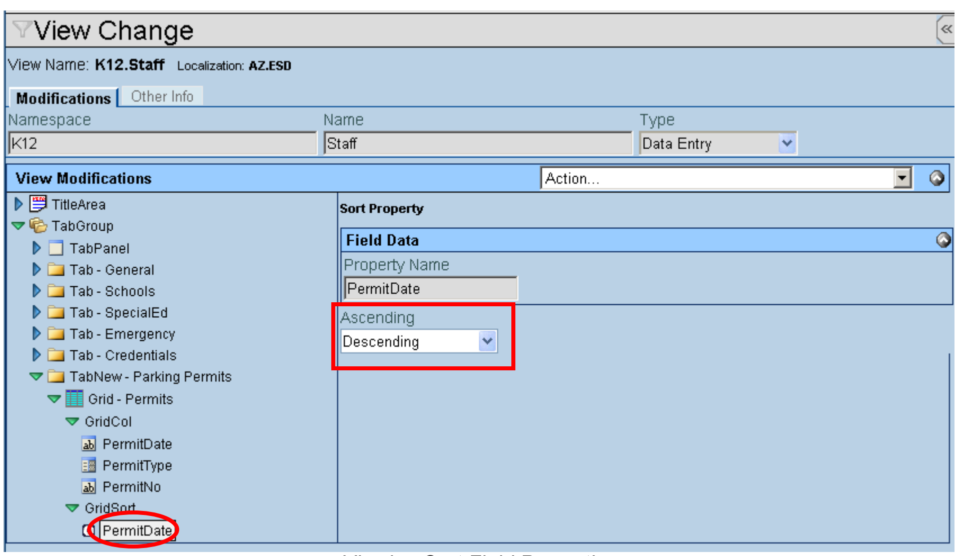
11. The columns that have been added to the grid are listed in the **Property** list. Select the sort order from the **Ascending** list.



Add Sort to Grid Screen

12. Click the **Save** button at the top of the screen.

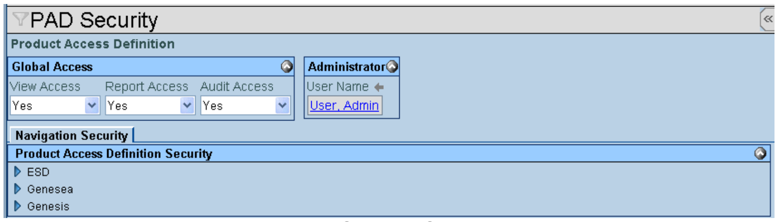
13. Once a sort field has been added, modify the order of the sort by clicking on the sort field. Additional sort fields can also be added.



Viewing Sort Field Properties

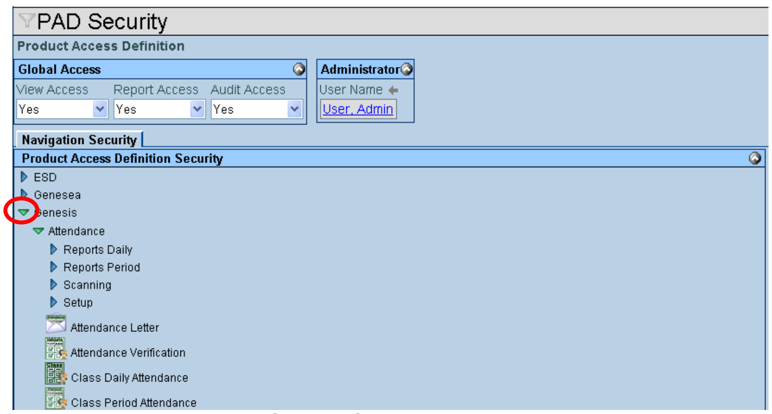
You can change the name of the screen, or change the icon to point to a different screen such as a new custom screen created by the district. To point to a different screen or rename a screen:

1. Go to **Synergy SIS > System > Security > PAD Security**.



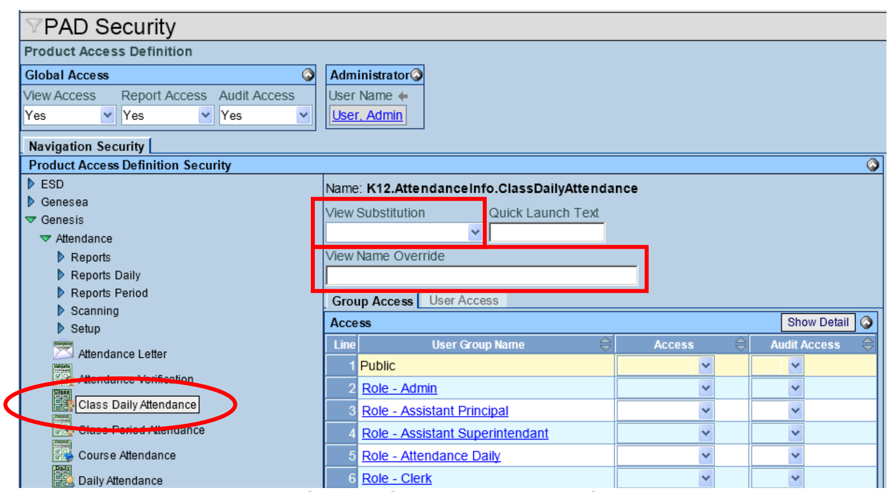
PAD Security Screen

2. Click the triangle next to the name of the module where the screen is stored. Continue clicking the triangles until the screen is shown.



PAD Security Screen, Expanded List

3. Click the screen or report.

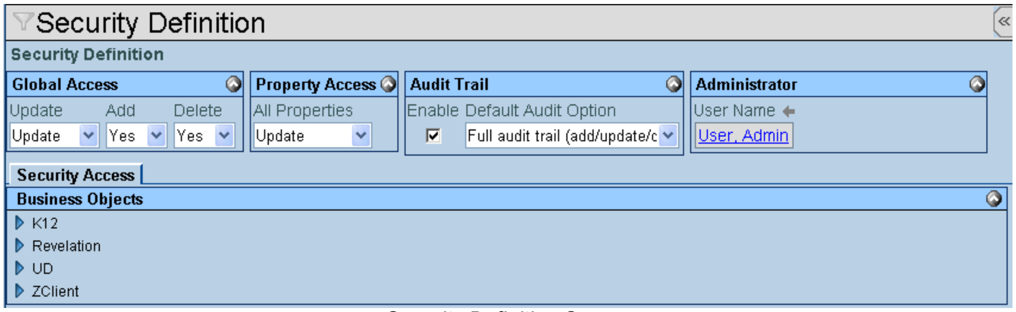


PAD Security Screen, Renaming a Screen

4. In the **View Name Override** box, enter the new name for the screen.
5. In the **View Substitution** list, select the name of the screen that should be displayed when the screen selected is clicked.
6. Click the **Save** button at the top of the screen.

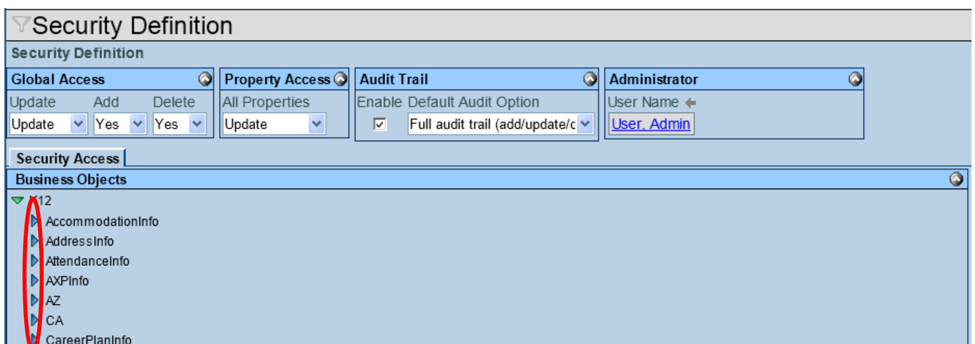
You can substitute one business object for another instead of substituting a screen. This may affect many screens, as business objects can be used across screens. To substitute a business object instead of a screen:

1. Go to **Synergy SIS > System > Security > Security Definition**.



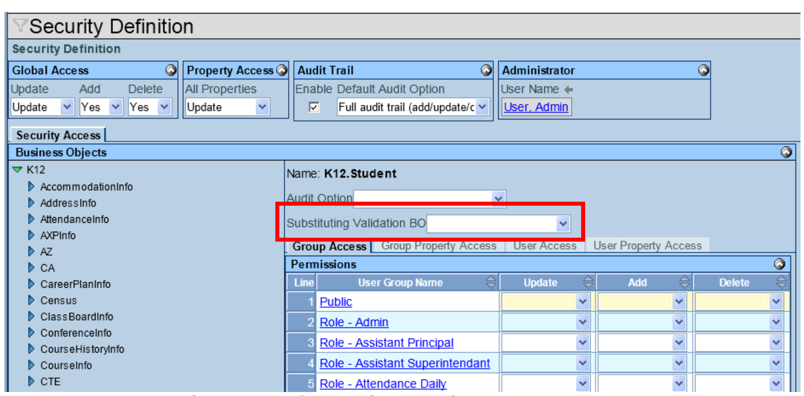
Security Definition Screen

2. To find a business object, click on the triangle next to the primary namespace that contains the business object.
3. Continue expanding namespaces by clicking the triangles until the desired business property is shown.



Security Definition Screen, Locating Business Properties

4. Click the business property to be modified.

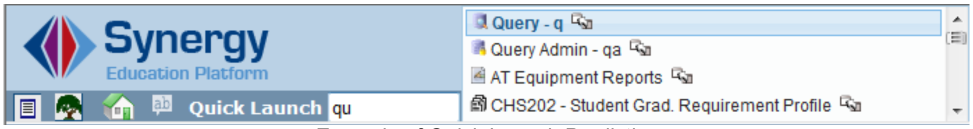


Security Definition Screen, Group Access Tab

5. Select the substitute business object from the **Substituting Validation BO** list.
6. Click the **Save** button at the top of the screen.

CUSTOMIZING QUICK LAUNCH ABBREVIATIONS

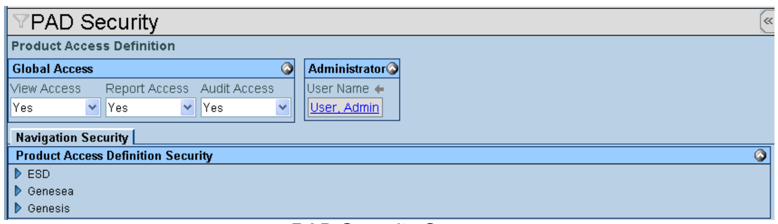
If the **Quick Launch** box is enabled for a user account, the user can quickly access a screen or report by typing its name in the **Quick Launch** box. As the user types, Synergy SIS displays matching names of screens and reports.



Example of Quick Launch Prediction

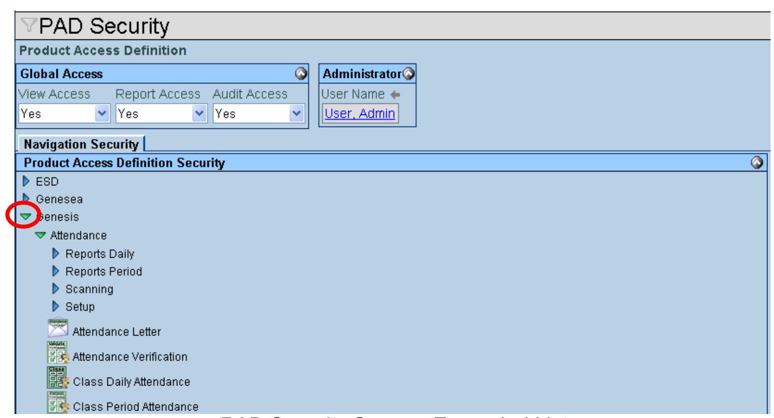
You can also configure abbreviations so even fewer keystrokes are required. To set a quick launch abbreviation:

1. Go to **Synergy SIS > System > Security > PAD Security**.



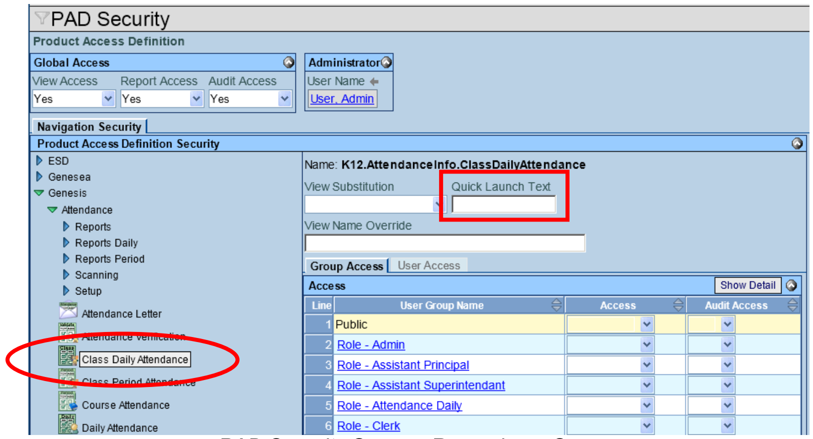
PAD Security Screen

2. Click the triangle next to the name of the module where the screen is stored. Continue clicking the triangles until the screen is shown.



PAD Security Screen, Expanded List

3. Click the screen or report.



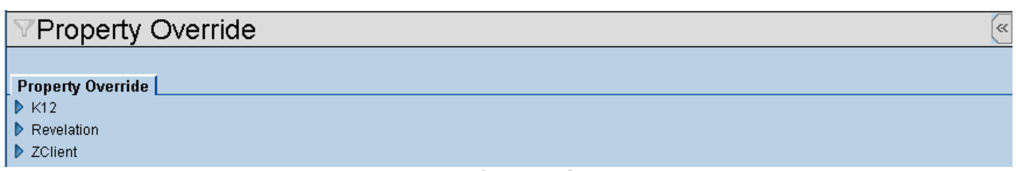
PAD Security Screen, Renaming a Screen

4. In the **Quick Launch Text** box, enter the new abbreviation for the screen.
5. Click the **Save** button at the top of the screen.

MODIFYING EXISTING FIELDS (PROPERTIES)

In addition to modifying the screens, some of the attributes of the existing properties can also be changed. To modify an existing property:

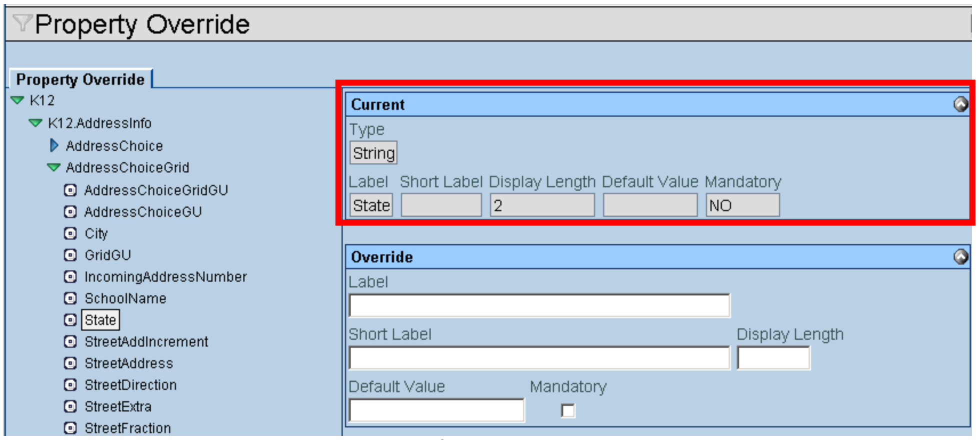
1. Go to **Synergy SIS > System > Setup > Property Override**.



Property Override Screen

2. Click the triangles to expand the business object tree until the property to be modified is displayed.

3. Click the property name. The current settings for the property selected are displayed on the right side of the screen.



Modifying a Property

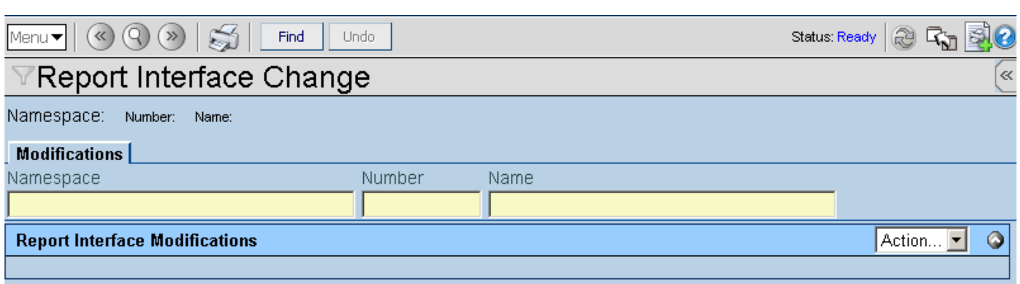
4. To show a different label than the default, enter the new **Label**, and **Short Label** if desired. The label is the text that appears on the top or left of the data entry box.
5. To change the length of the data entry box, enter the new number of characters to display in the **Display Length** box.
6. To set a value for the field that is entered automatically when a new record is created, but that can be changed by the user, enter the **Default Value**.
7. Check the **Mandatory** box to require that data is entered in the field before it can be saved.
8. Click the **Save** button at the top of the screen.

CHANGING A REPORT INTERFACE

The **Report Interface Change** screen enables you to customize query-based reports and user-defined (UD) reports. You can change what is on the **Options** tab of **Report Interface** screens, and you can add tabs.

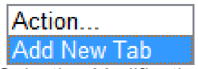
To change a report interface:

1. Go to **Synergy SIS > System > Data and Views > Report Interface Change**.



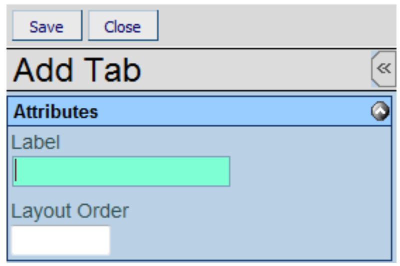
Report Interface Change Screen

2. Scroll or use Find mode to locate the report whose interface you want to change.
3. To add a tab to the interface, click the **Action** button and select **Add New Tab**.



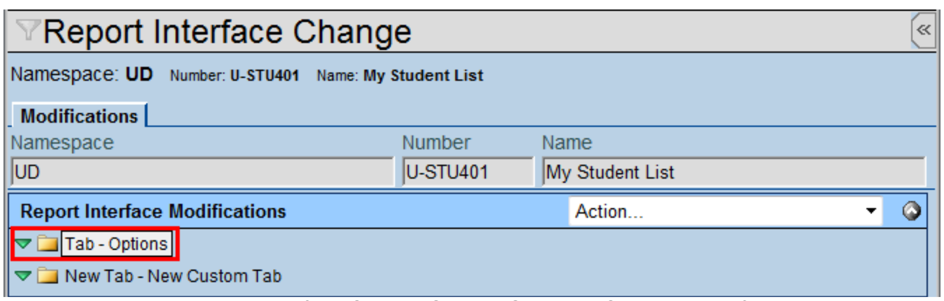
Selecting Modification

4. In the **Label** field, type a label for the new tab.



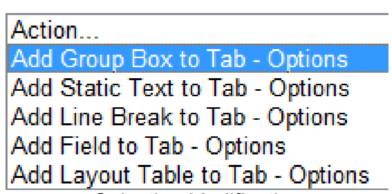
Adding a Tab

5. In the **Layout Order** field, type a number to indicate where the tab should appear relative to other tabs.
6. Click the **Save** button at the top of the screen.
7. Under **Report Interface Modifications**, select an object to modify. For example, select **Tab – Options** to modify the **Options** tab of the interface.



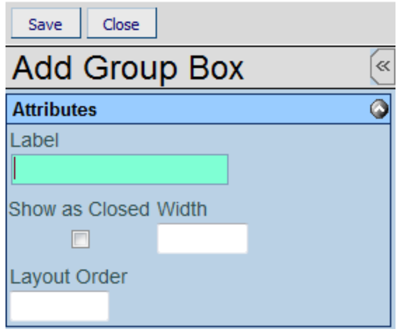
Report Interface Change Screen, Selecting Object to Modify

8. In the **Action** list, select the modification to make. For example, if you selected **Tab – Options** under **Report Interface Modifications**, you might select **Add Group Box to Tab – Options** in the **Action** list.



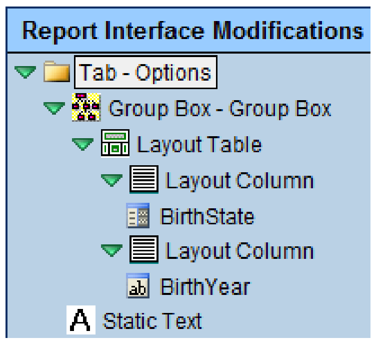
Selecting Modification

9. In the window that opens, enter properties for the object, and click the **Save** button.



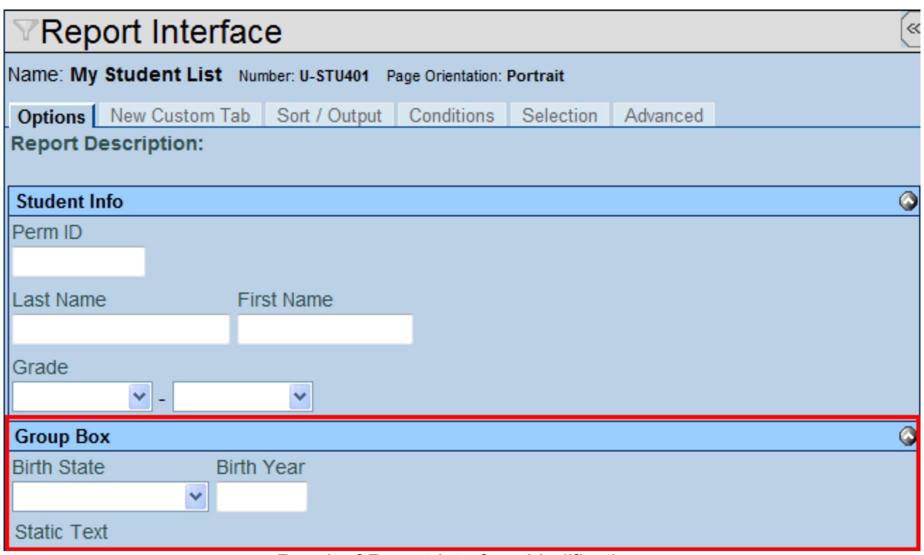
Example Screen for Adding an Object

10. Repeat steps 7-9 until all changes are complete. For example, here we add a group box, layout table, two layout columns with one field each, and some static text:



Report Interface Modifications

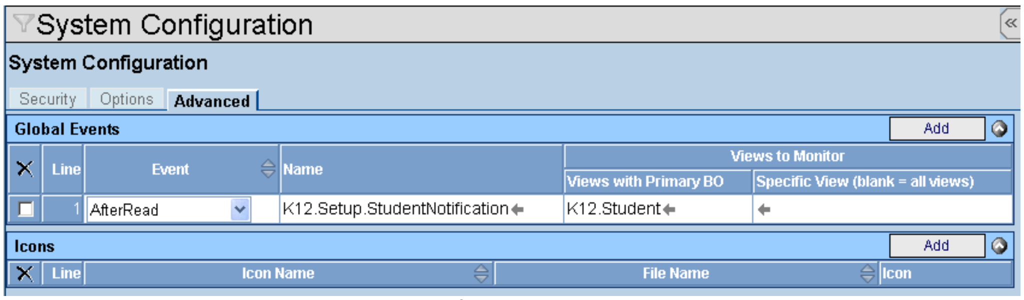
The resulting change to the **Report Interface** screen:



Result of Report Interface Modifications

DEFINING SCREEN EVENTS

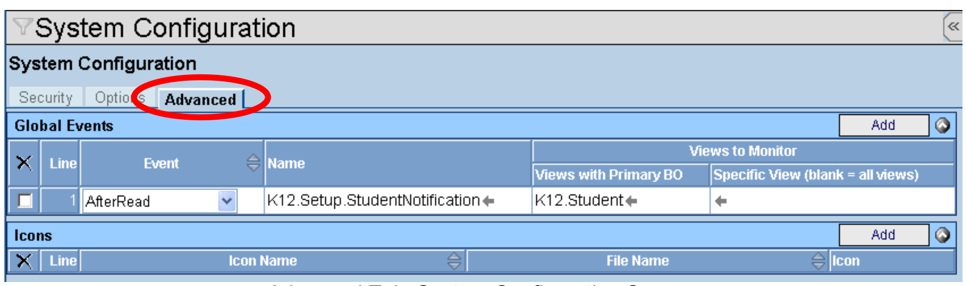
Another way Synergy SIS can be customized is to define what happens after a screen is saved or changed. These are referred to as screen events. Some events are predefined in the system and should not be changed. An example of a pre-defined screen event is shown below:



Predefined View Events

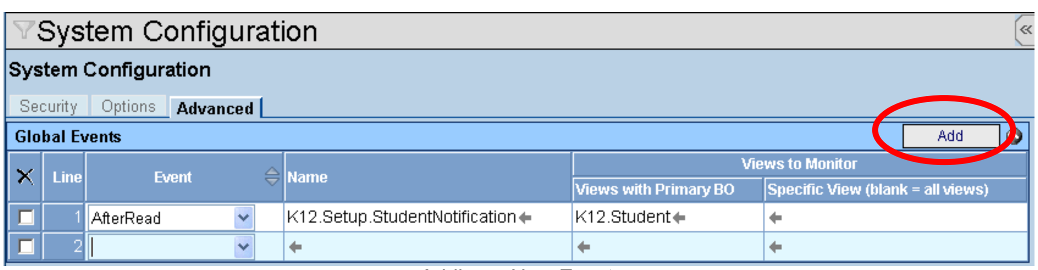
These are the screen events that produce the student notification icon at the top of all screens. To create a new screen event:

1. Go to **Synergy SIS > System > Setup > System Configuration**, and click the **Advanced** tab.



Advanced Tab, System Configuration Screen

2. Click the **Add** button, and a new blank line is added to define the event.

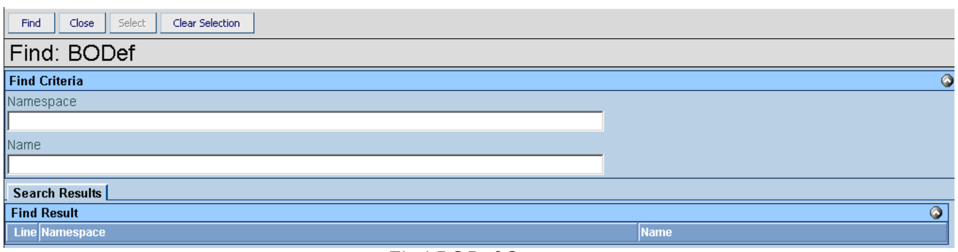


Adding a New Event

3. Select the type of **Event** from the list. The types of events are:
   - **AfterDelete** – After a record is deleted from a screen
   - **AfterInsert** – After a new record is created
   - **AfterRawXML** – After an xml file is imported
   - **AfterRead** – After a record is displayed in a screen

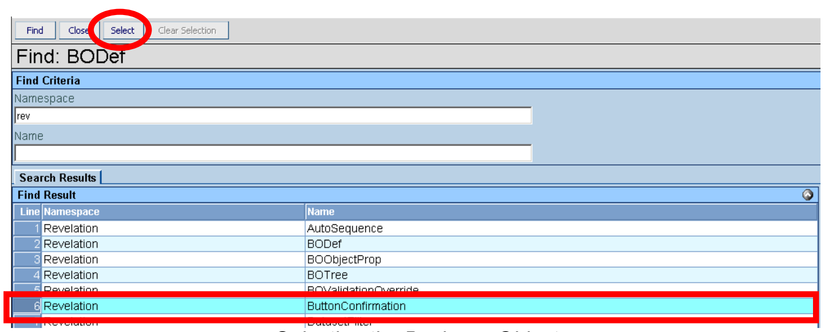
- **AfterRender** – After a screen is displayed
- **AfterUpdate** – After a record is updated
- **BeforeDelete** – Before a record is deleted from a screen
- **BeforeFind** – Before the results of a Find search is displayed
- **BeforeFKRender** – Before a grid in a screen is displayed
- **BeforeInsert** – Before a new record is added
- **BeforeRead** – Before a record is displayed
- **BeforeRender** – Before a screen is displayed
- **BeforeUpdate** – Before a record is updated

4. Select the business object that should be started when the event happen,s by clicking the gray arrow in the **Name** column.
5. In the **Find: BODef** screen, enter all or part of the **Namespace** and/or **Name** of the business object, and click the **Find** button.



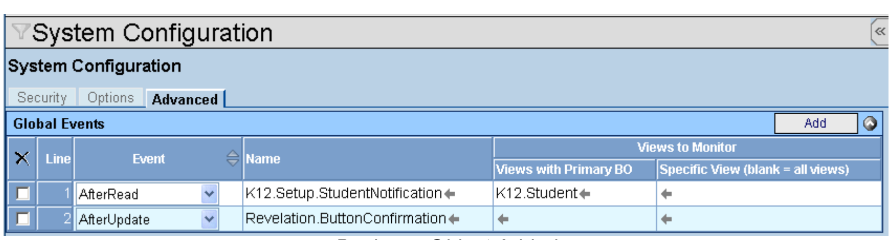
Find BODef Screen

6. In the **Find Result** grid, click the business object, and then click the **Select** button.



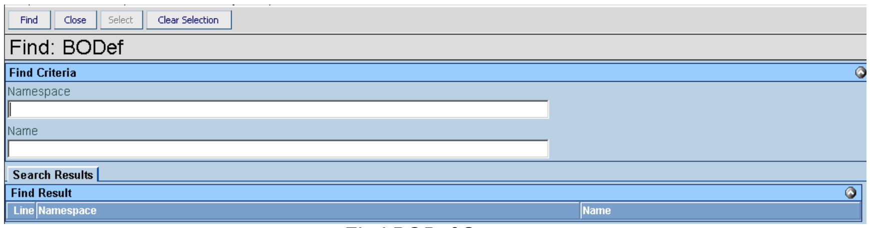
Selecting the Business Object

7. Select which screens to apply this event to. Screens can be selected by their primary business object, or a specific screen can be selected, or both. For example, if the K12. Student object is selected as the primary business object, the event will apply to all screens in which the student is listed at the top of the screen.



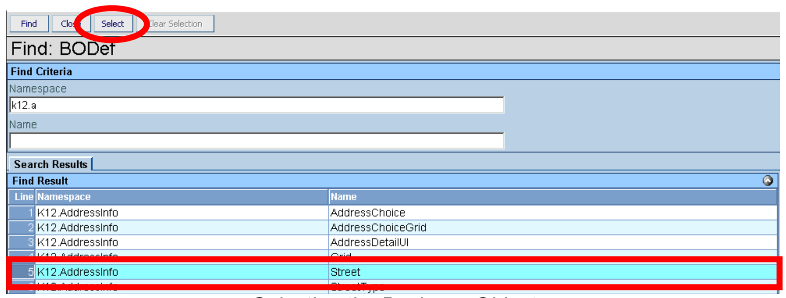
Business Object Added

8. To select screens based on their primary object, click the gray arrow in the **View with Primary BO** column.
9. In the **Find: BODef** screen, enter all or part of the **Namespace** and/or **Name** of the business object, and click the **Find** button.



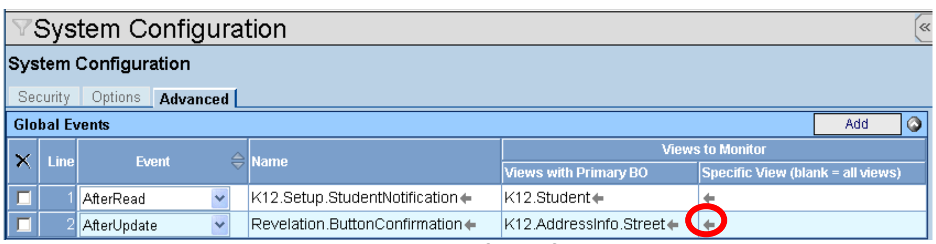
Find BODef Screen

10. In the **Find Result** grid, click the business object, and then click the **Select** button.



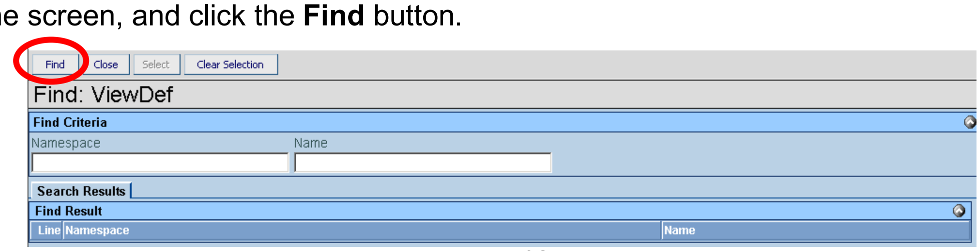
Selecting the Business Object

11. To select a specific screen to apply the event, click the gray arrow in the **Specific View** column. If you select no specific screen, the change applies to all screens.



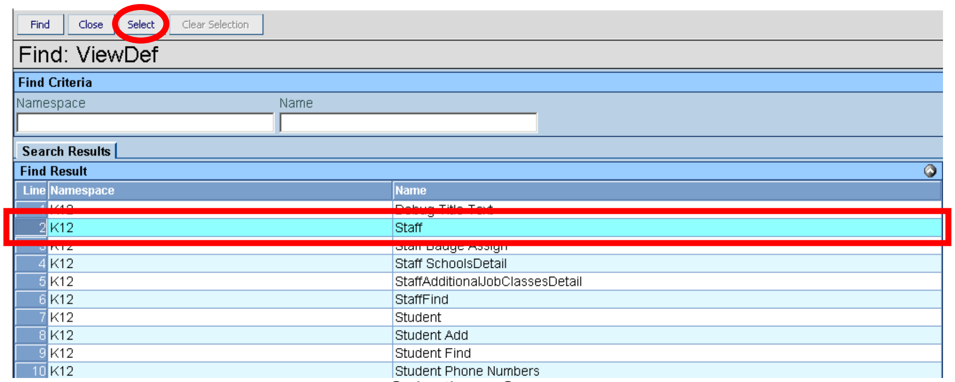
Primary Business Object Selected

12. In the **Find: ViewDef** screen, enter all or part of the **Namespace** and/or **Name** of the screen, and click the **Find** button.



Find ViewDef Screen

13. In the **Find Result** grid, click the screen, and then click the **Select** button.



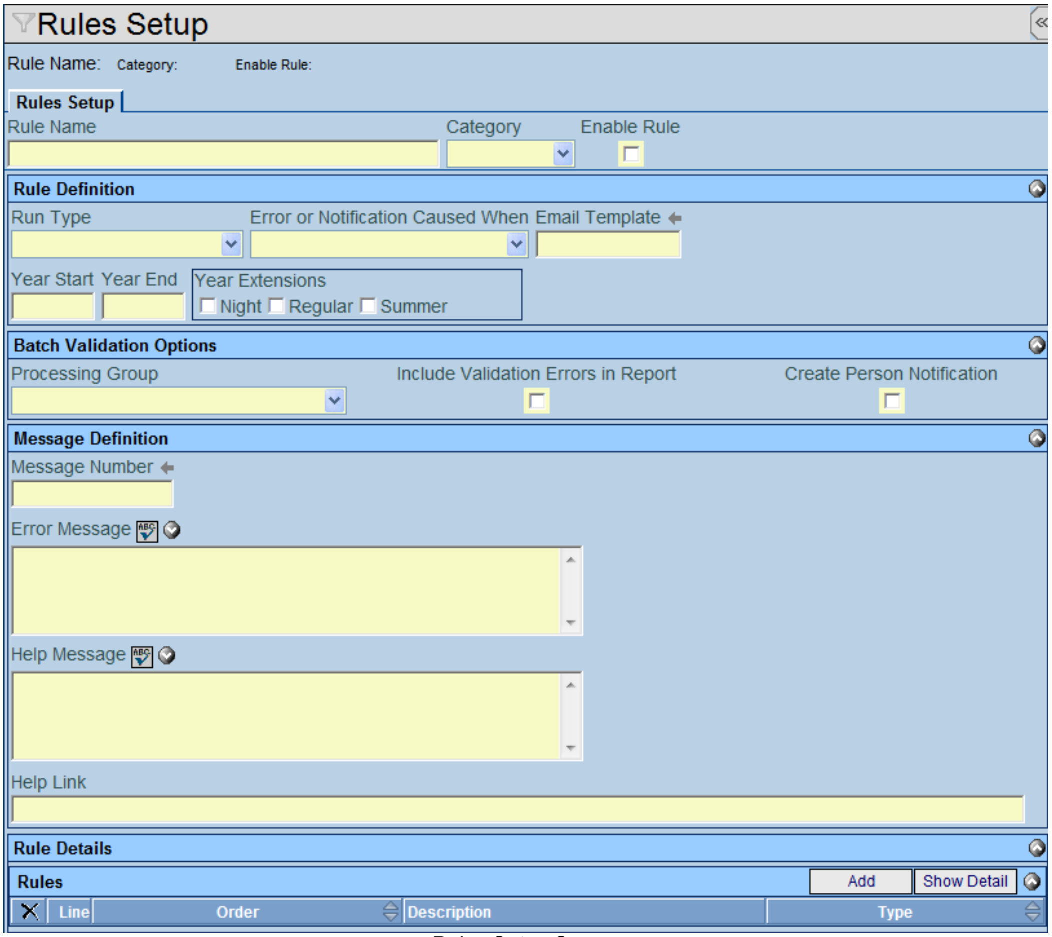
Selecting a Screen

14. Click the **Save** button at the top of the screen.

CREATING CUSTOM RULES

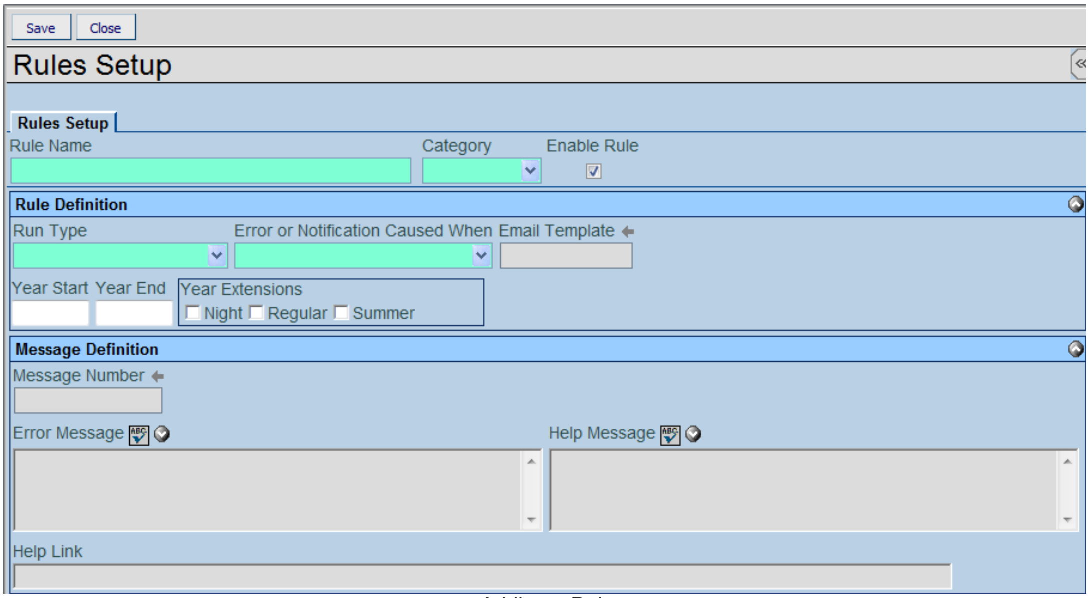
Creating custom rules allows additional validation for information entered into Synergy SIS. Custom rules can check to see how long a student has been participating in ELL, or send a list of all enrolled students whose home language is not English. To set up a rule:

1. Go to **Synergy SIS > System > Setup > Rules Setup**.



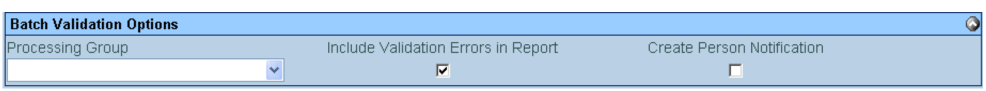
Rules Setup Screen

2. Click the **Add** button at the top of the screen. A new **Rules Setup** screen opens.



Adding a Rule

3. Enter a name for the rule in the **Rule Name** box.
4. Select a **Category** for the rule.
5. Check the **Enable Rule** box to turn the rule on.
6. Select the **Run Type**. **Batch** rules run once a day, **Real Time** rules run at the time the data is entered, and **Real Time and Batch** rules run for both.
7. In the **Error or Notification Caused When** list, select when a message regarding the rule is generated.
8. Click the gray arrow next to **Email Template** to find and select the mail template to be used for the message.For information about mail templates, see Chapter Eight.
9. Enter the school to start processing the rule in the **Year Start** box, and, if applicable, the year to stop running the rule in the **Year End** box.
10. Check the boxes for the **Year Extensions** for which this rule is effective.
11. If **Batch** or **Real Time and Batch** was selected as the **Run Type**, select **Batch Validation Options**.

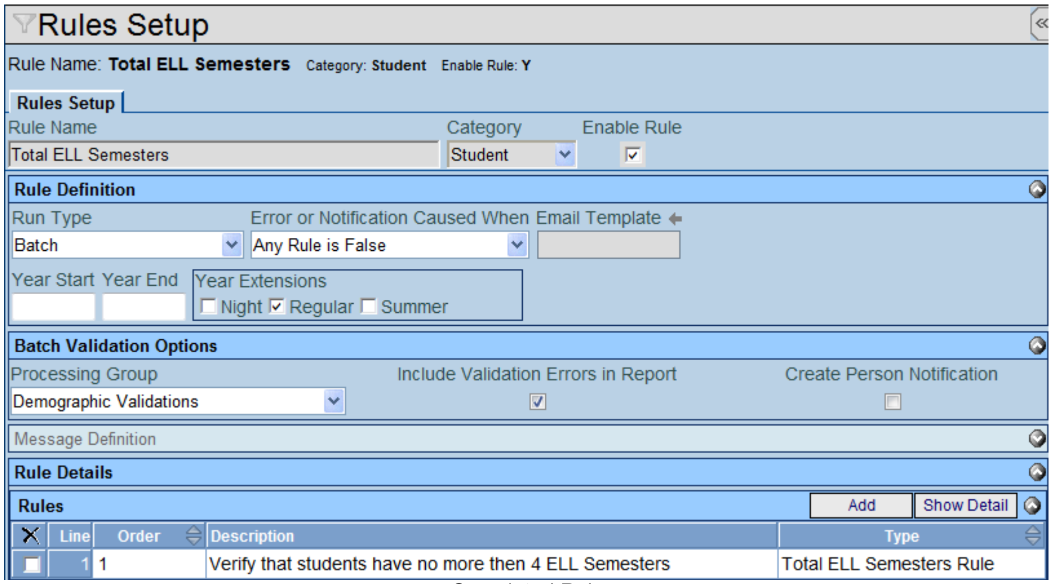


Batch Validation Options

   a. Select the **Processing Group** to be used by the rule. Each processing group is assigned a run time, and a user group or individual user who receives any error notifications. Processing groups are set up using the **Rule Group** screen, as described in the next section.
   b. Check the box to **Include Validation Errors in Report**, if desired.
   c. Check the **Create Person Notification** box to create a notification code in the **Person Notification Codes** screen automatically, and automatically assign it to students that meet the criteria of the rule.

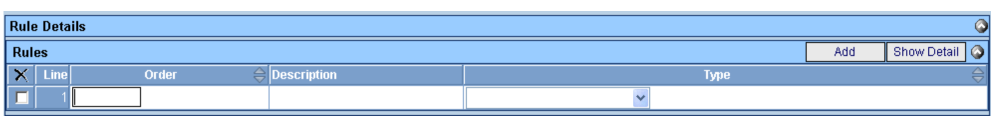
12. Click the gray arrow next to **Message Number** to select the message that is used when the rule is active. To create a custom message, see the section later in this chapter on how to customize error messages.
13. Click the **Save** button at the top of the screen.

Once a rule name has been created, the actual rules to validate must be added. To add the rule details:

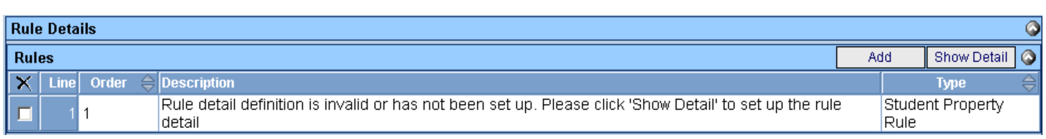


Completed Rule

1. Click the **Add** button in the **Rules** section.
2. A new line is added to the section. Enter a number to indicate the **Order** in which the rule should be processed.

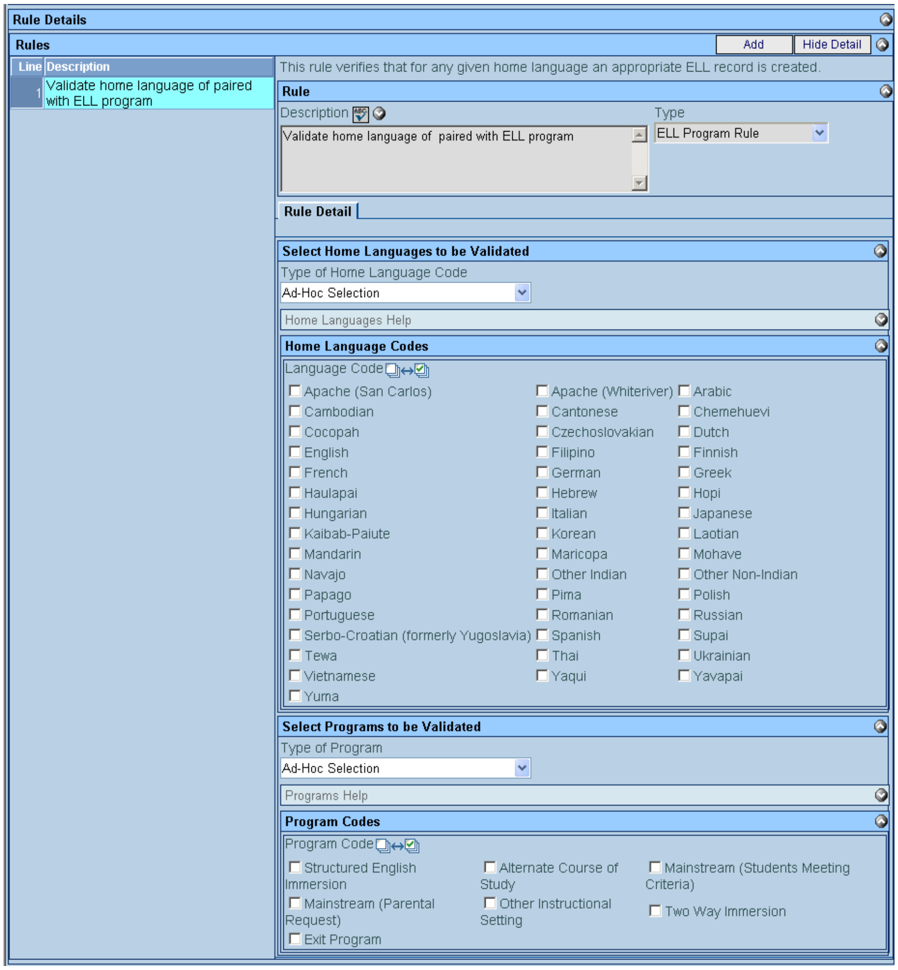


3. Skip **Description**¸ which will be added automatically once the rule is defined, and select the **Type** of rule to create. The **ELL Program Rule** checks the Student Home Language against the ELL Program in which the student is participating, and gives an error if they don't match. The **Student Property Rule** allows a rule to be created based on the values in over 10 student-related tables. The **Student Related Property Rule** sets up an if-then rule based on student-related tables. If the value in the first table matches the rule, it looks at a second value in a different table. The **Total ELL Semesters Rule** verifies that students have not been participating in an ELL program for more than X semesters.
4. Click the **Save** button at the top of the screen. The **Description** of the new rule indicates that the rule detail definition is invalid or missing.



Rule Added to Rule Details

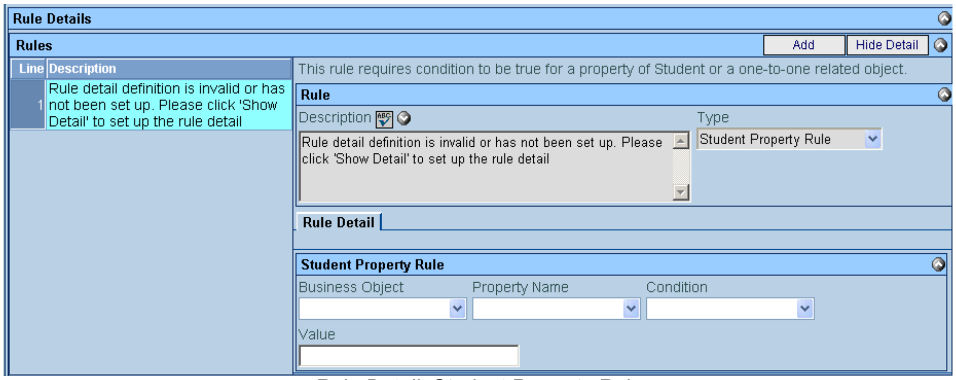
5. Click the **Show Detail** button to define the newly created rule.
6. For the **ELL Program Rule**, choose whether to select individual languages to compare by selecting **Ad-Hoc Selection** from the **Type of Home Language Code** list or select **All Languages**. If **Ad-Hoc Selection** is chosen, check the boxes for the languages to be compared.



Rule Detail, ELL Program Rule

7. For the **Type of Program**, choose **Ad-Hoc Selection** to specify which programs are valid for the languages selected above, or select **All Programs**.
The rule will send an error message if a student with one of the selected languages is not participating in one of the selected programs.

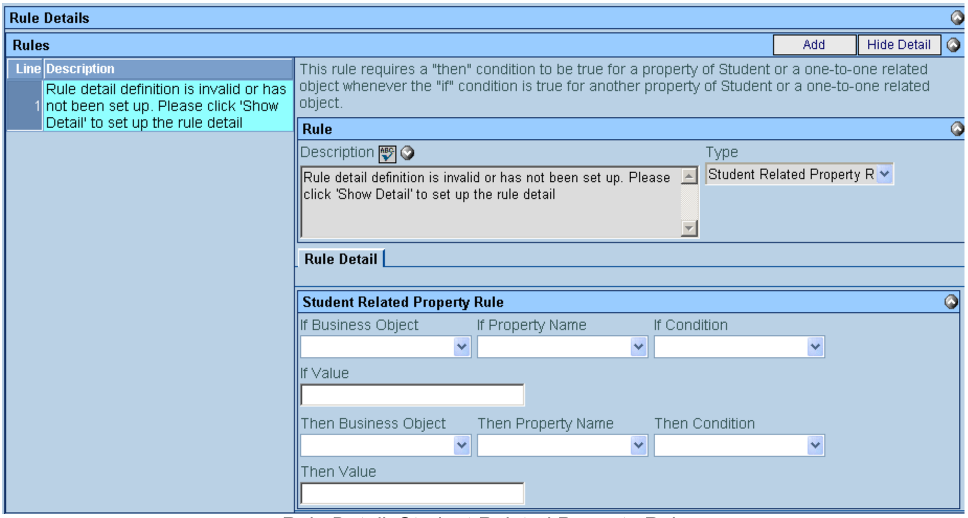
8. For the **Student Property Rule**, select the **Business Object** that holds the property to be evaluated, and select the **Property Name**.



Rule Detail, Student Property Rule

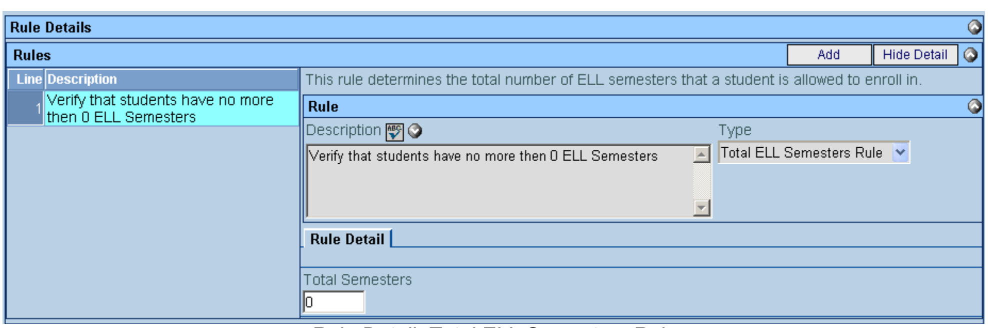
9. Select a **Condition** from the list to compare against the data entered in the selected property. Conditions can be:
   a. **Must Have A Value/Does Not Have A Value** – the property selected must have/must not have any value. For this condition, leave the Value blank.
   b. **Contains/Does Not Contain** – the property selected must contain/must not contain the value entered.
   c. **Equal To/Is Not Equal To** – the property selected must be/must not be exactly the same as the value entered.
   d. **Ends With/Does Not End With** – the property selected must end/must not end with the value entered.
   e. **Greater or Equal/Is Not Greater Than or Equal** – the property selected must be/must not be greater than or equal to the value entered.
   f. **Greater Than/Is Not Greater Than** – the property selected must be/must not be greater than the value entered.
   g. **In List/Is Not In List** – the property selected must include/must not include one of the values entered in the Value field. List values are entered in the Value box separated by a comma.
   h. **Less Than or Equal/Is Not Less Than or Equal** – the property selected must be/must not be less than or equal to the value entered.
   i. **Less Than/Is Not Less Than** – the property selected must be/must not be less than the value entered.
   j. **Starts With/Does Not Start With** – the property selected must start/must not start with the value entered.
10. Enter the **Value** to be compared against the date entered in the selected property.

11. For the **Student Related Property Rule**, select the first business object that holds the property to be evaluated in **If Business Object**, and select the property name in **If Property Name**.



Rule Detail, Student Related Property Rule

12. Select an **If Condition** to compare against the data entered in the selected property, and enter the **If Value**.
13. When the data in **If Property Name** meets the condition and value, the rule looks at **Then Property Name**. Select the second business object that holds the property to be evaluated in **Then Business Object**, and select the property name from **Then Property Name**.
14. Select a **Then Condition** from the list to compare against the data entered in the selected property, and enter the **Then Value**.
15. For the **Total ELL Semesters Rule**, enter the total number of semesters that students should not exceed in the ELL program in the **Total Semesters** box.



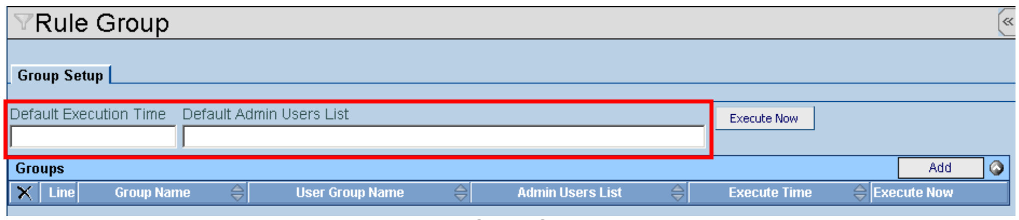
Rule Detail, Total ELL Semesters Rule

16. Click the **Save** button at the top of the screen.

CREATING RULE PROCESSING GROUPS

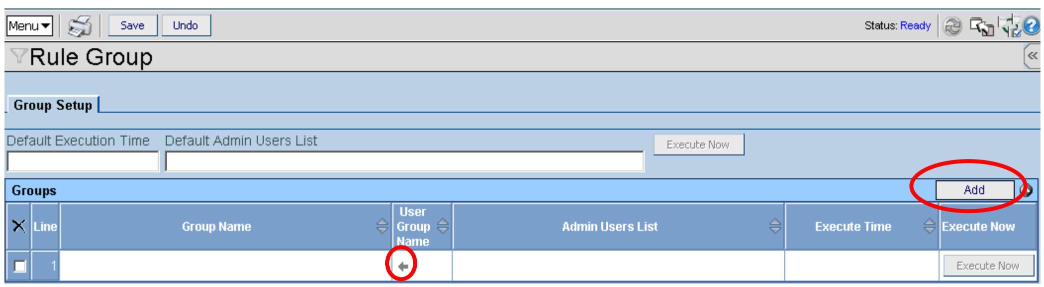
Rule groups are used by custom rules that are set up for batch processing. Each group can be set up to run at a specific time of day, and notifications about any errors in processing can be sent to specific users or a user group. Groups can be set up based on processing time or type of rule processed. To create a new rule group:

1. Go to **Synergy SIS > System > Setup > Rule Group**.



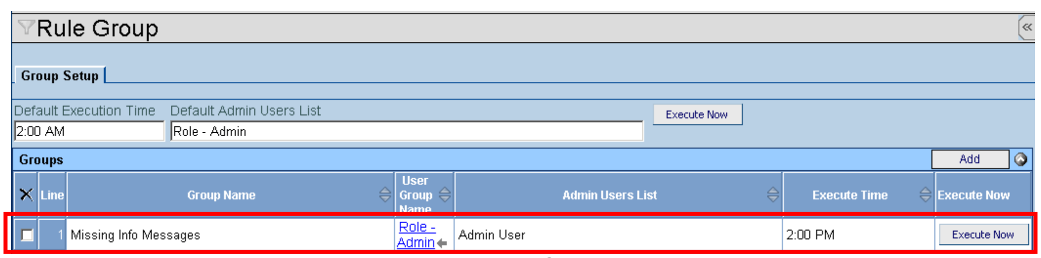
Rule Group Screen

2. Enter the default time to run any of the groups in the **Default Execution Time** box.
3. Enter the email addresses of the users who will receive any error messages when groups are processed in the **Default Admin Users List**.
4. Click the **Add** button in the **Groups** section to create a new processing group.



Adding a New Group

5. Enter a name for the group in the **Group Name** column.



New Processing Group Added

6. Click the gray arrow in the **User Group Name** column to select a user group. The users in this group will receive all messages from the group.
7. Enter the email addresses of the users who will receive any error messages when this group is processed in the **Admin Users List**.
8. Click the **Save** button at the top of the screen.
9. Enter the time the group will be processed every day in the **Execute Time** column.

Executing Rule Groups

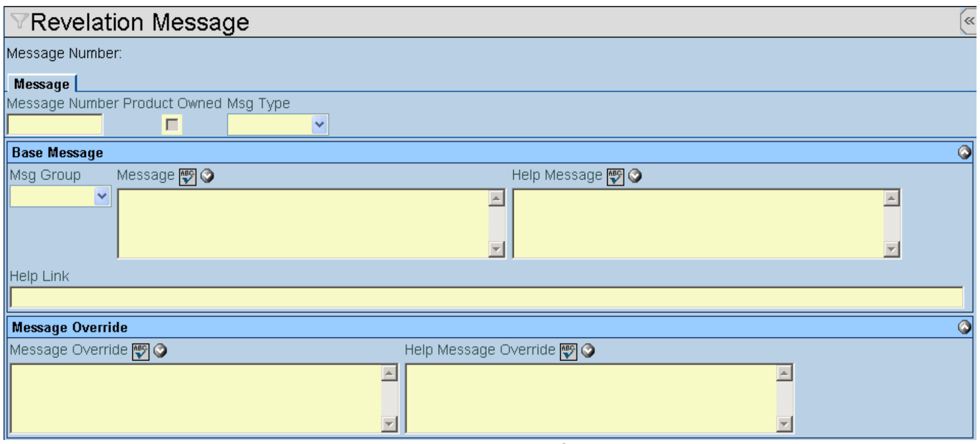
- To run a group manually, click the Execute Now button in the group line.
- To run all groups, click the Execute Now button at the top of the screen.

CUSTOMIZING MESSAGES

Synergy SIS has pre-programmed messages that provide warnings when data is not entered correctly, give information about an error, or simply provide more information.

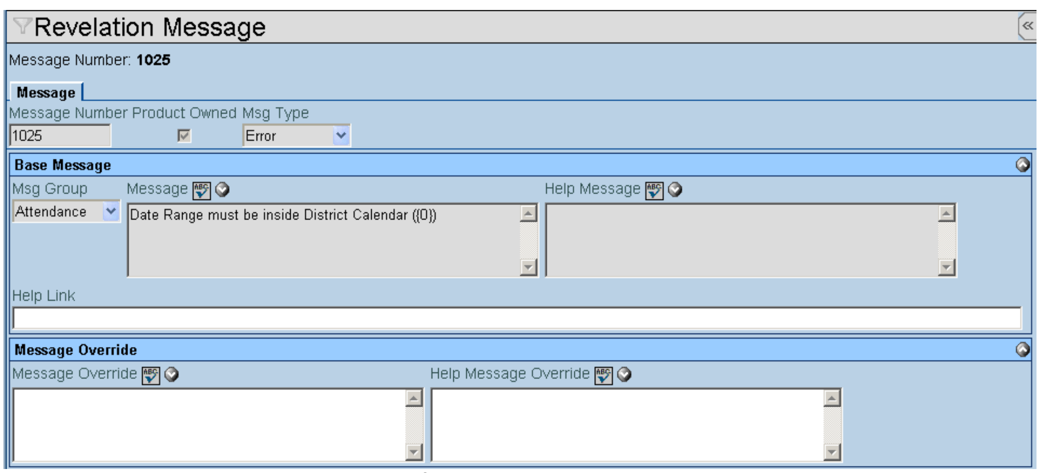
To override the text of an existing message:

1. Go to **Synergy SIS > System > Setup > Revelation Message**.



Revelation Message Screen

2. Find the message using the Scroll buttons or Find mode.



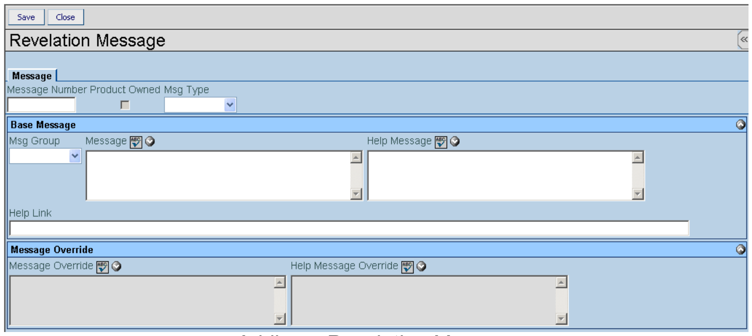
Modifying an Existing Message

3. To provide a link to web page with additional information about the message, enter the HTML path in the **Help Link** box.
4. Enter the new message text in the **Message Override** box.
5. Enter the new help message text in the **Help Message Override** box.

6. Click the **Save** button at the top of the screen.

To add a new message for use in a rule:

1. Click the **Add** button at the top of the screen.

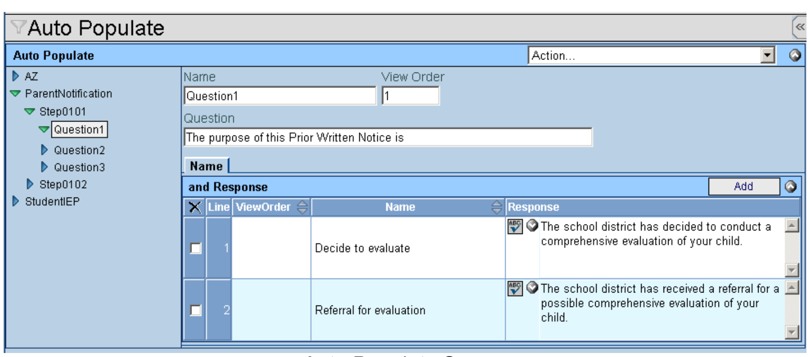


Adding a Revelation Message

2. Assign a number to the message in the **Message Number** box. This number must be unique.
3. Select the type of message from the **Msg Type** list.
4. Assign a group to the message from the **Msg Group** list.
5. Enter the message text in the **Message** box.
6. Enter the help message text in the **Help Message** box.
7. To provide a link to web page with additional information about the message, enter the HTML path in the **Help Link** box.
8. Click the **Save** button at the top of the screen.

AUTO POPULATE

The Auto Populate screen is used to specify various options for Synergy SE special education software. For information about working with this screen, see the *Synergy SE – System Administrator Guide*.



Auto Populate Screen

Chapter Eight: EMAIL CONFIGURATION

This chapter covers:

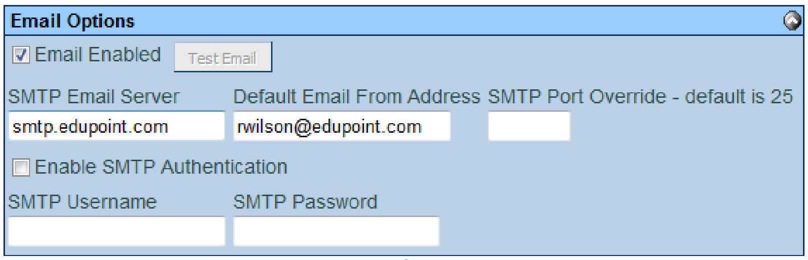
- ► General Email Configuration
- ► Customizing Email Notifications
- ► Sample Email Content
- ► Email Variables

Several areas within Synergy SIS can be configured to send email automatically when certain events occur. For example, parents can receive automatic notices when their children are absent or are part of a disciplinary incident. Staff can also send email manually to parents and students. To send these emails, Synergy SIS needs access to an SMTP email server. This can be an Exchange server or the Default SMTP Virtual Server included with Windows Server software.

GENERAL EMAIL CONFIGURATION

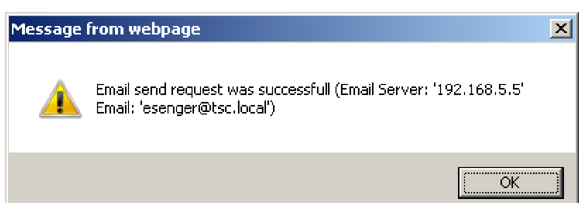
To connect the Synergy SIS email system to an email server:

1. Go to **Synergy SIS > System > Setup > System Configuration**.
2. In the **Email Options** section, check the **Email Enabled** box.



Email Options

3. In the **SMTP Email Server** box, enter the server name or IP address of the server running SMTP.
4. Enter the email address to be used as the “From:” address in the email messages sent from Synergy SIS in the **Default Email From Address** box.
5. If the SMTP server uses a port other than 25 to send email, enter the port number in the **SMTP Port Override** box.
6. If your SMTP server requires authentication, check the **Enable SMTP Authentication** box, and in the **SMTP Username** and **SMTP Password** boxes, enter credentials for the SMTP server.
7. To test the connection to the SMTP server, click the **Test Email** button. If there is a problem with the connection to the email server, a message explains the problem. If it is successful, a message states that the send request was successful.



SMTP Successful Message Box

Caution: Be sure the anti-virus software installed on the Synergy SIS web server is not blocking port 25, as this will prevent email communications. If needed, override the SMTP port as described above.

Synergy SIS offers many ways to communicate via email.:

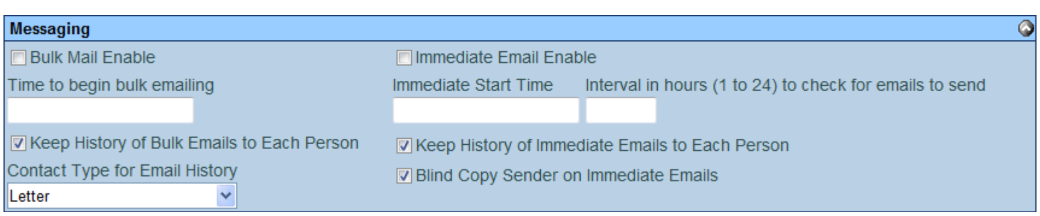
- Teachers can send email messages to the students and/or the parents of the students in their classes from the TeacherVUE software. These messages can be sent to all students in a class or to an individual student.
- Staff can send email messages to all of the students and/or parents of the students in the current organization in focus. These messages can also be grade-specific. For example, a message could be sent to all students in grade 9 at a school, or a message could be sent to all parents within the district.
- Parents can be sent automated messages about a student's absence, involvement in a disciplinary incident, or when a student's grades are posted. The parents can specify which of these messages they would like to receive from within the ParentVUE software, and Synergy SIS administrators can customize these messages.
- Reports can be sent via email via a scheduled report or immediately when a report is generated.
- Logs of completed process such as the Grade Book Sync, the SIF extract, or the Rules process can be sent to system administrators for monitoring.

For instructions on how email messages are generated from within the TeacherVUE software, refer to the *Synergy SIS – TeacherVUE User Guide*. For instructions on staff can send messages from within Synergy SIS, see the *Synergy SIS – Student Information User Guide*. To see how parents can customize which messages are sent to them, refer to the *Synergy SIS – ParentVUE & StudentVUE Parent & Student Guide*. To send reports via email, see the *Synergy SIS – Query & Reporting Guide*.

When email messages are generated, they are placed in a queue that is processed at specific intervals. This email queue can be set to process all messages once a day, referred to as **Bulk Mail**, or periodically throughout the day, referred to as **Immediate Email**. Only one type of queue should be used. The automated notices sent to parents can be set up with a different type of queue than the main queue setup in the **System Configuration** screen. For information about customizing the email queue for the automated parent notices, see the *Synergy SIS – ParentVUE & StudentVUE Administrator Guide*.

To set up the overall email queue processing times:

1. Go to **Synergy SIS > System > Setup > System Configuration**.
2. In the **Messaging** section, check either the **Bulk Mail Enable** or **Immediate Email Enable** box.



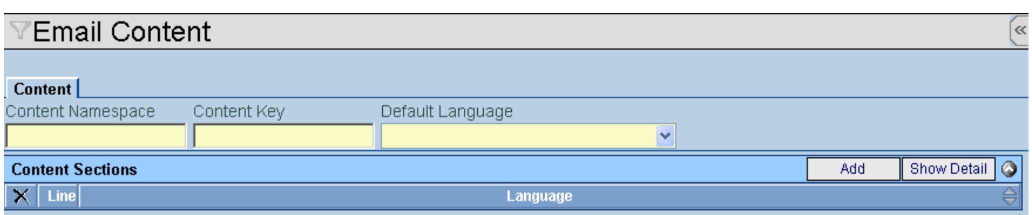
Messaging

3. For Bulk Mail:
    a. Enter the **Time to begin bulk emailing** in HH:MM AM/PM format.
    b. To keep a record of each email sent to the parents and students, check the **Keep History of Bulk Emails to Each Person** box. The emails are recorded on the **Student Contact Log** tab of the **Student** screen.
    c. If keeping a history of the emails sent to each person, select the type of contact that will be used when the email is entered into the contact log from the **Contact Type for Email History** list.
4. For Immediate Mail:
    a. In the **Immediate Start Time** box, enter the time that email should begin processing in HH:MM AM/PM format.
    b. Enter the number of hours between processing times in the **Interval in hours** box. For example, if the processing starts at 6:00 AM and is set to 1 hour intervals, email will be sent every hour on the hour starting at 6 am and ending at midnight.
    c. Check the **Keep History of Immediate Emails to Each Person** box to keep a record of all emails sent. This information is stored in the database but not accessible through Synergy SIS.
    d. To send a blind copy of each email to the sender, check the **Blind Copy Sender on Immediate Emails** box.

CUSTOMIZING EMAIL NOTIFICATIONS

Several types of email notifications can be sent out daily from Synergy SIS to parents and students. Most of these notifications are sent from the ParentVUE and StudentVUE system. Each of these notifications can be customized at the district level. The district can control the subject and the message body. To create the district email notifications:

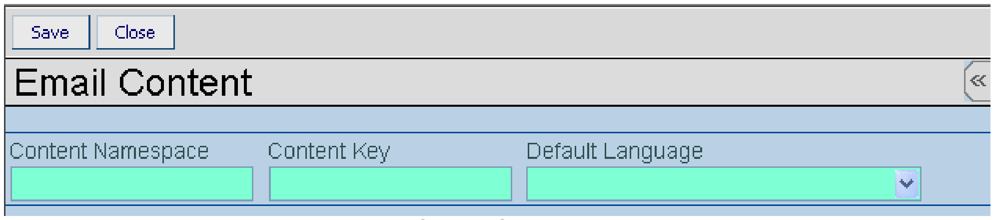
1. Go to **Synergy SIS > System > Setup > Email Content**.



Email Content Screen

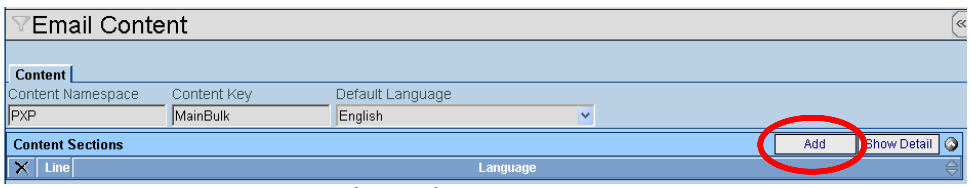
2. To add a new email message, click the **Add** button at the top of the screen. A new **Email Content** screen opens.

3. Enter the **Content Namespace** and **Content Key**, and select the **Default Language** to be used.



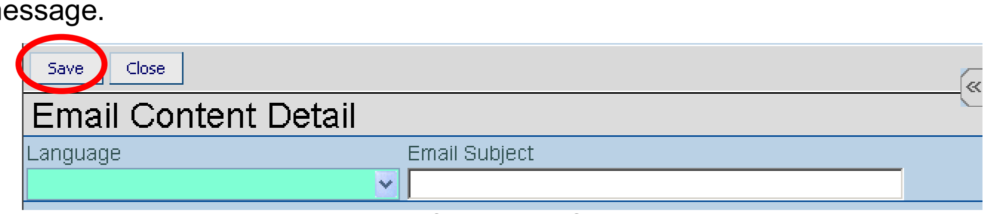
Email Content Screen, Adding

4. Click the **Save** button at the top of the screen.
5. To add the email messages, click the **Add** button in the **Content Sections** grid. For each type of email message, multiple languages can be configued. The student's home language will then determine the language used for the email that is sent.



Email Content Screen, Adding a Message

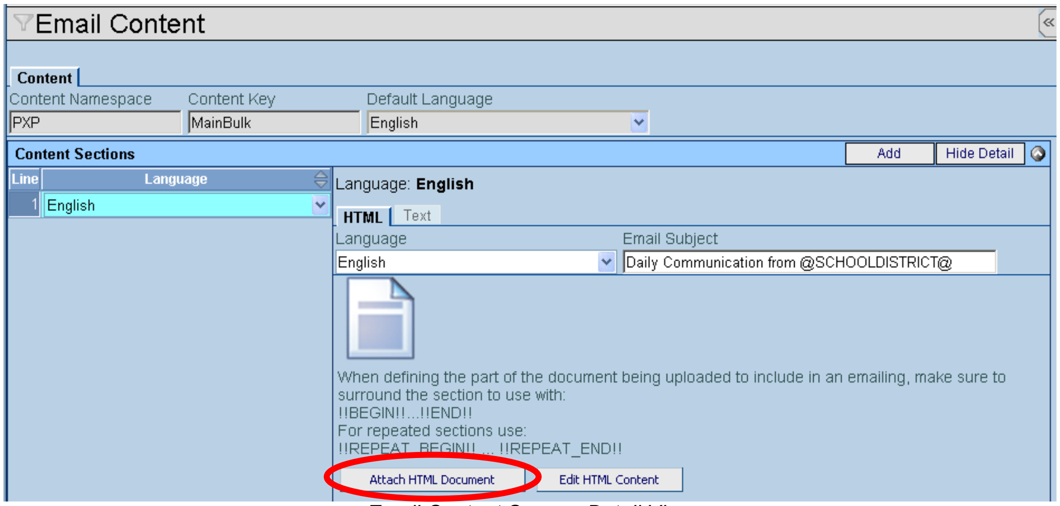
6. In the **Email Content Detail** screen, select the **Language** to be used in the email message.



Email Content Detail Screen

7. Enter the subject of the email in the **Email Subject** box. Variables such as the student name or district name can also be used in the subject. A list of possible variables is shown at the end of this section of the guide.
8. Click the **Save** button at the top of the screen.
9. To add the message body, click the **Show Detail** button.

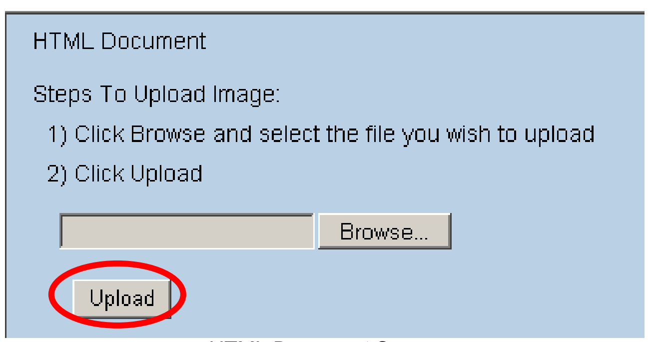
10. Message can be entered either by uploading an existing HTML document, or uploading an existing Text document. Once an HTML document has been uploaded, it can be edited directly in Synergy SIS using the built-in HTML editor.



Email Content Screen, Detail View

11. To upload an existing HTML document and send the message in HTML format, click the **Attach HTML Document** button. The document must be in an email message HTML format instead of a web page format, and to indicate the beginning and ending of the message the tags !!BEGIN!! and !!END!! must be added. To add a section that repeats such as a table of attendance information, mark the beginning and ending of that section with !!REPEAT_BEGIN!! And !!REPEAT_END!!

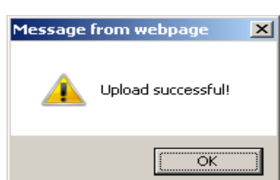
12. The HTML Document box opens. Click the **Browse…**button to locate the document, and then select the document.



HTML Document Screen

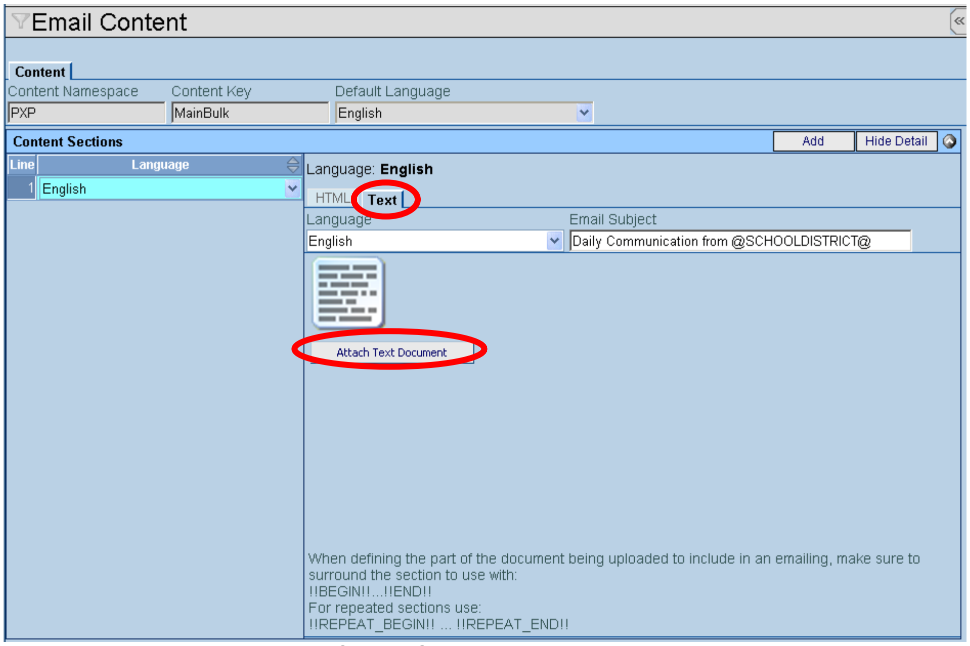
13. Once the document is listed in the Browse box, click the **Upload** button.

14. When the document has been successfully uploaded, a message box opens stating that the upload was successful. Click the **OK** button.



Message Box

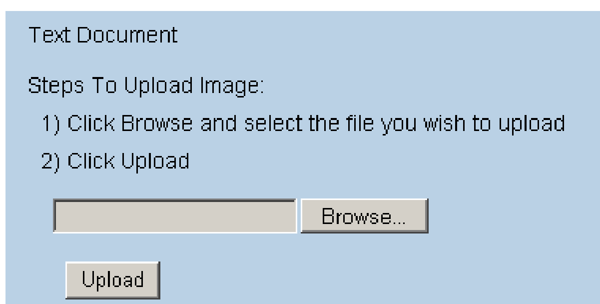
15. To upload an existing text document and send the message in text format, click the **Text** tab.



Email Content Screen, Detail View, Text Tab

16. Click the **Attach Text Document** button. The document must be in text format, and to indicate the beginning and ending of the message the tags !!BEGIN!! and !!END!! must be added. To add a section that repeats such as a table of attendance information, mark the beginning and ending of that section with !!REPEAT_BEGIN!! And !!REPEAT_END!!

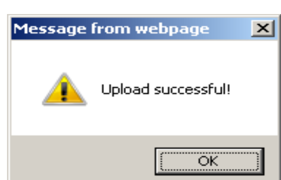
17. In the **Text Document** window, click the **Browse…** button to locate the document, and then select the document.



Text Document Upload

18. Click the **Upload** button.

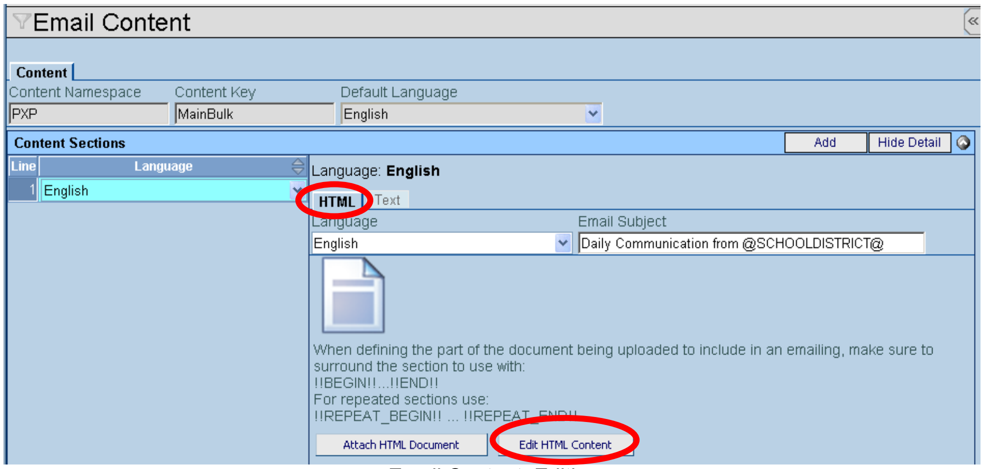
19. When the document has been successfully uploaded, a message box opens stating that the upload was successful. Click the **OK** button.



Message Box

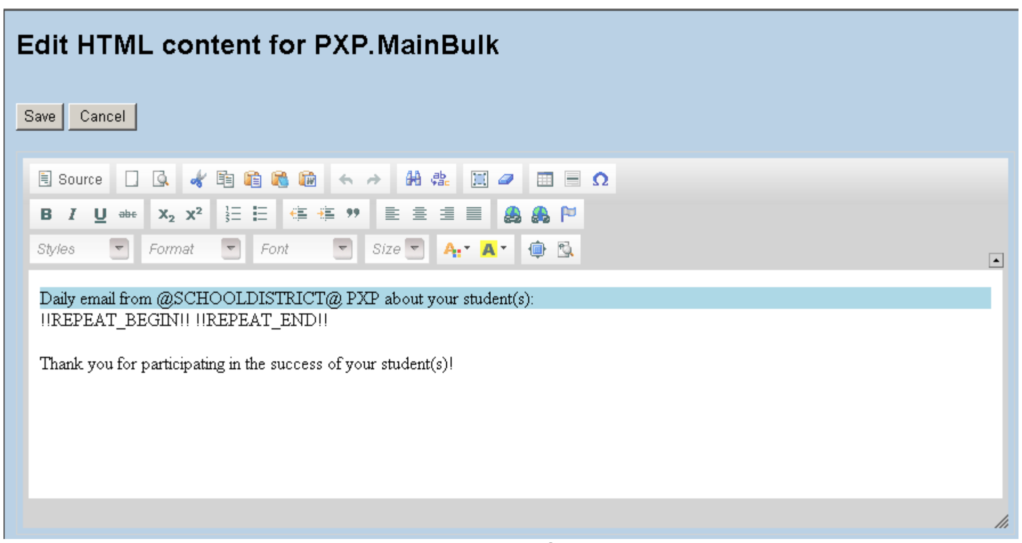
To edit the message directly in the built-in HTML Editor:

1. Click the **HTML** tab.



Email Content, Editing

2. Click the **Edit HTML Content** button.
3. Edit the message. The !!BEGIN!!...!!END!! tags are not shown in this mode.



Editing HTML Content

4. To edit the message in HTML code, click the **Source** button. When editing in HTML, the !!BEGIN!!...!!END!! tags are shown. To return to a "WYSIWYG" (What You See Is What You Get) style of editing, click the **Source** button again.
5. Editing tools are:

-  **New Page** – deletes the existing message
-  **Preview** – opens the message in a new window
-  **Cut, Copy & Paste** – cuts, copies, or pastes the selected text

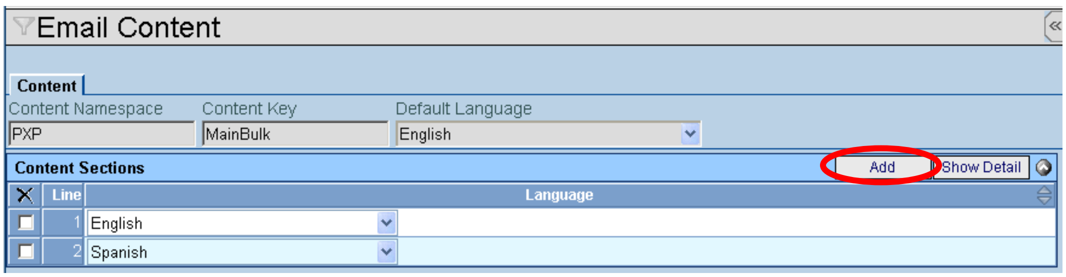
- **Paste as Plain Text** – this pastes the text as plain text with no formatting. This is helpful when copying from other programs which may have hidden HTML formatting, such as other web pages or Microsoft Outlook.
- **Paste From Word** – this cleans up text that has been copied from a Microsoft Word document before pasting it into the message. Word in particular adds a lot of hidden HTML formatting to its text.
- **Undo and Redo** – undo the last action, or redo the last action
- **Find and Replace** – find and/or replace the specified text in the message
- **Select All** – select the entire message
- **Clear Format** – clear all formatting for the selected text
- **Table** – insert a table
- **Horizonal Line** – insert a horizontal line
- **Insert Special Character** – insert a special character such as a copyright mark or currency symbol
- **Bold, Italic, Underline, or Strikethrough** – format the selected text as bold, italic, underline, or strikethrough
- **Subscript or Superscript** – format selected text as subscript or superscript
- **Numbering or Bulleting** – format the selected paragraphs as numbers or bullets
- **Indent, Outdent or Blockquote** – indent or outdent the selected paragraph. Blockquote indents the paragraph on both sides.
- **Left, Center, Right, or Justify** – format the selected paragraphs as left, center, right or justified text.
- **Insert or Remove Hyperlink** – insert or remove a website link
- **Anchor** – insert a link to a place inside the message
- Styles **Text Style** – select a built-in format for the selected text
- Normal (... **Paragraph Style** – select a built-in format for the selected paragraph
- Font **Font** – select a font for the selected text
- Size **Size** – select the size for the selected text

- **Text Color** – select a color for the selected text
- **Background Color** – select a background color for the selected text, similar to highlighting
- **Maximize** – maximize the editing window
- **Show Blocks** – show the formatting divisions withint the message

6. Click the **Save** button at the top of the screen.

To add messages in additional languages:

1. Click the **Add** button in the **Content Sections** grid.



Adding Additional Languages

2. Select a different language, and follow the steps to create a custom message in the new language.

SAMPLE EMAIL CONTENT

Below is a table listing sample messages. You can use them by saving them to a text file and uploading them as HTML.

Content Key	Subject	Message
MainBulk	Daily Communication from @SCHOOLDISTRICT@	<style type="text/css">.{font-family: arial}</style> Daily email from @SCHOOLDISTRICT@ PXP about your student(s): !!REPEAT_BEGIN!! !!REPEAT_END!! Thank you for participating in the success of your student(s)!
MainImmediate	Notification	<style type="text/css">.{font-family: arial}</style> Notification from @SCHOOLDISTRICT@ about your student(s): !!REPEAT_BEGIN!! !!REPEAT_END!! Thank you for participating in the success of your student(s).

EMAIL VARIABLES

Variables that can be used within email subjects or message bodies to be filled in with data from Synergy SIS are:

Variable	Description
@SCHOOLDISTRICT@	The name of the district
@STUDENTNAME@	The student's first and last name
@SCHOOL@	The name of the school where the student attends
@ABS@	The absence reason for either daily or period attendance absences
@PERIOD@	The period number
@ABS1@, @ABS2@	The absence reasons for AM and PM attendance
@ADDDROP@	Either Add or Drop for the section
@COURSEIDANDTITLE@	The course ID and course title
@TEACHER@	The teacher's name of the section
@ROOM@	The room name of the section
@TERM@	The term name in which the section is taught
@TIMEOFEVENT@	The time of a discipline incident
@REFERREDBY@	The staff who referred the student, either for a discipline incident or a nurse's visit
@DESCRIPTION@	A description of either a discipline incident or a nurse's visit
@REPORTPERIOD@	The grading period
@TIMEIN@, @TIMEOUT@	The time in and time out for a nurse's visit

Chapter Nine: OTHER SETUP

This chapter covers:

- ► How to define frequency units, labels, and page sizes
- ► How to modify lookup tables
- ► How to set up a mail merge
- ► How to set up SIF
- ► How to define tasks
- ► How to configure automatic translations
- ► How to view your software updates

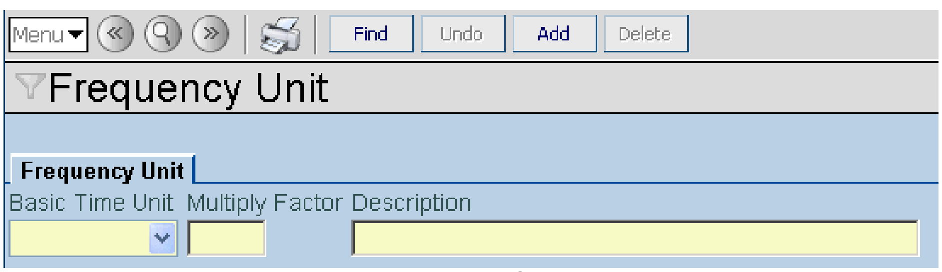
System-wide options, not specific to any organization, are:

- **Frequency Unit** – units of time used in various screens. For example, the definition of a quarter needs to be defined.
- **Label Detail** – labels that can be printed from Synergy SIS. Instead of each user tweaking the setup to print labels correctly, the labels can be set up for use across the system.
- **Lookup Table Definition** – defines the values used in the lists available throughout Synergy SIS.
- **Mail Merge Definition** and **Mail Merge District Definition** – letters that can be merged with the data in Synergy SIS to produce custom letters for each student or parent.
- **Page Size Detail** – paper sizes that can be printed from Synergy SIS.
- **SIF** (Schools Interoperability Framework) – data that can be extracted and exchanged with other software systems.
- **Task Definition** – processes that can be scheduled to run daily to produce a list of tasks for each user on the Synergy SIS home page.

FREQUENCY UNIT

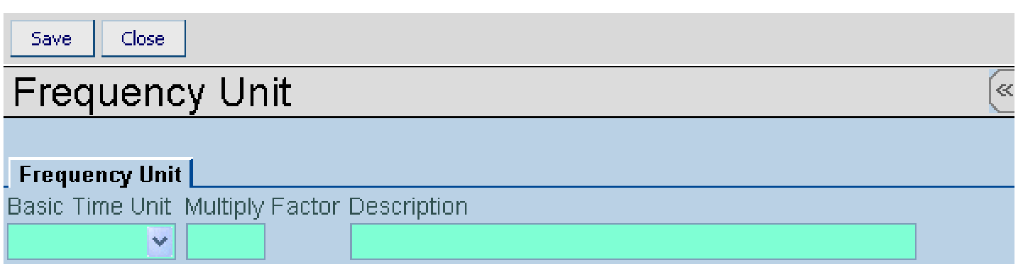
The Frequency Unit definitions are time definitions that can be used for calculations in various screens such as the **Immunization Definition** screen. They specify what a particular description of a period of time actually means. For example, it can define quarterly as a 3-month period. To create a frequency unit:

1. Go to **Synergy SIS > System > Setup > Frequency Unit**.



Frequency Unit Screen

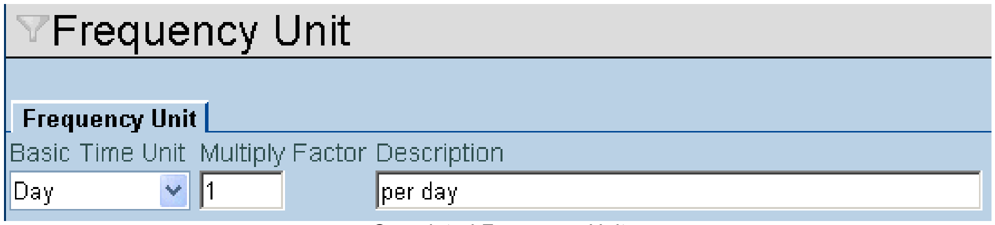
2. Click the **Add** button at the top of the screen. The new **Frequency Unit** screen opens.



Adding a New Frequency Unit

3. Select the time unit to be used in the calculation from the **Basic Time Unit** list.

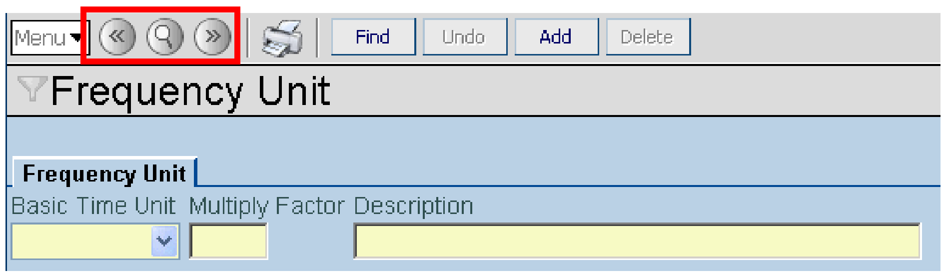
4. In the **Multiply Factor** box, enter a number to indicate how many of the basic time units define the new unit. For example, a **Basic Time Unit** of **Week** and a **Multiply Factor** of **2** define a two-week period.
5. Enter a description of the frequency unit to be used in the other screens in the **Description** box.
6. Click the **Save** button at the top of the screen.



Completed Frequency Unit

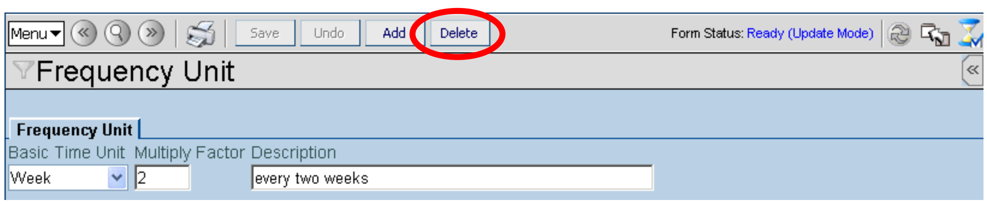
To delete a frequency unit:

1. Find the frequency unit using either the **Scroll** buttons or **Find** mode.



Finding a Frequency Unit

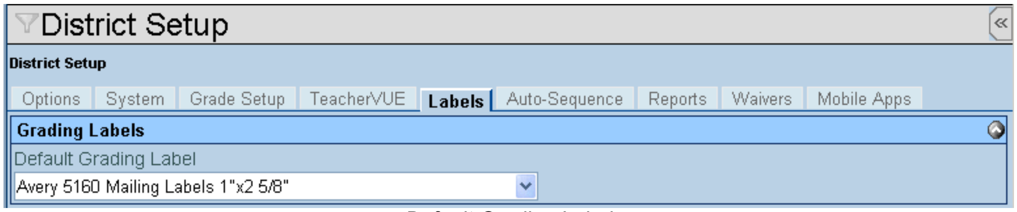
2. Click the **Delete** button at the top of the screen.



Deleting a Frequency Unit

LABEL DETAIL

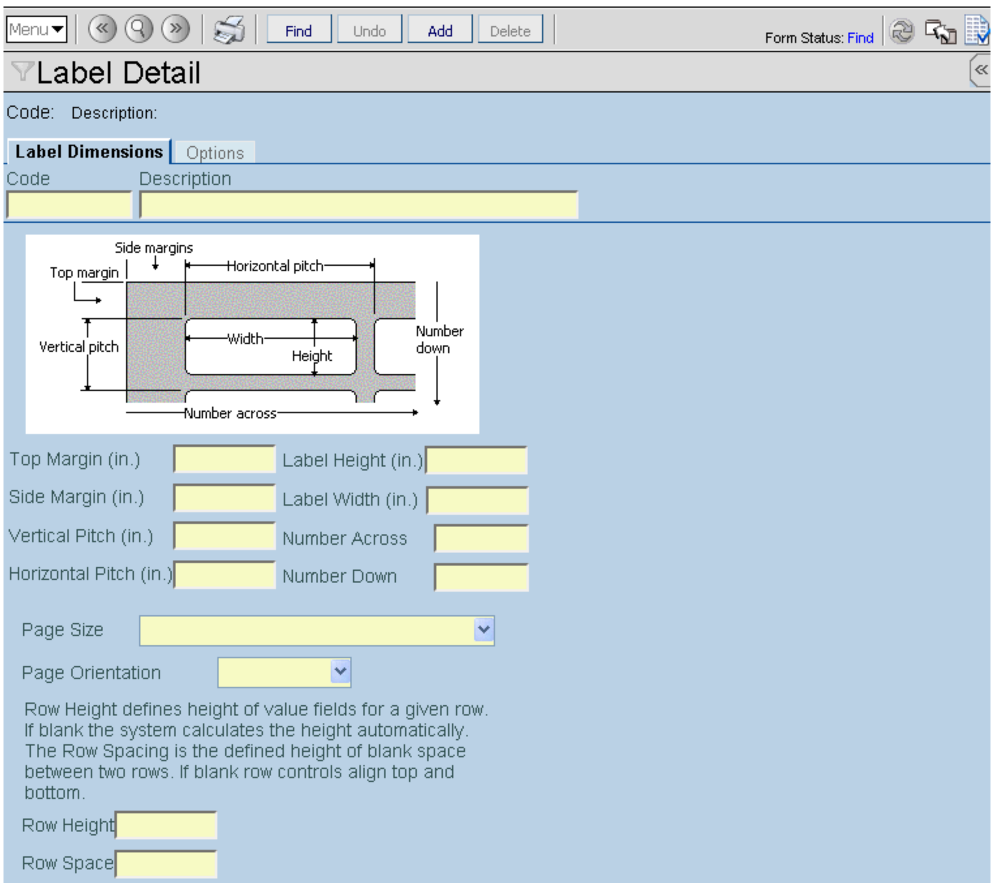
The **Label Detail** screen defines the size of labels that can be used for printing in many screens, such as the reports or the default grading labels for the district.



Default Grading Label

To define a new label:

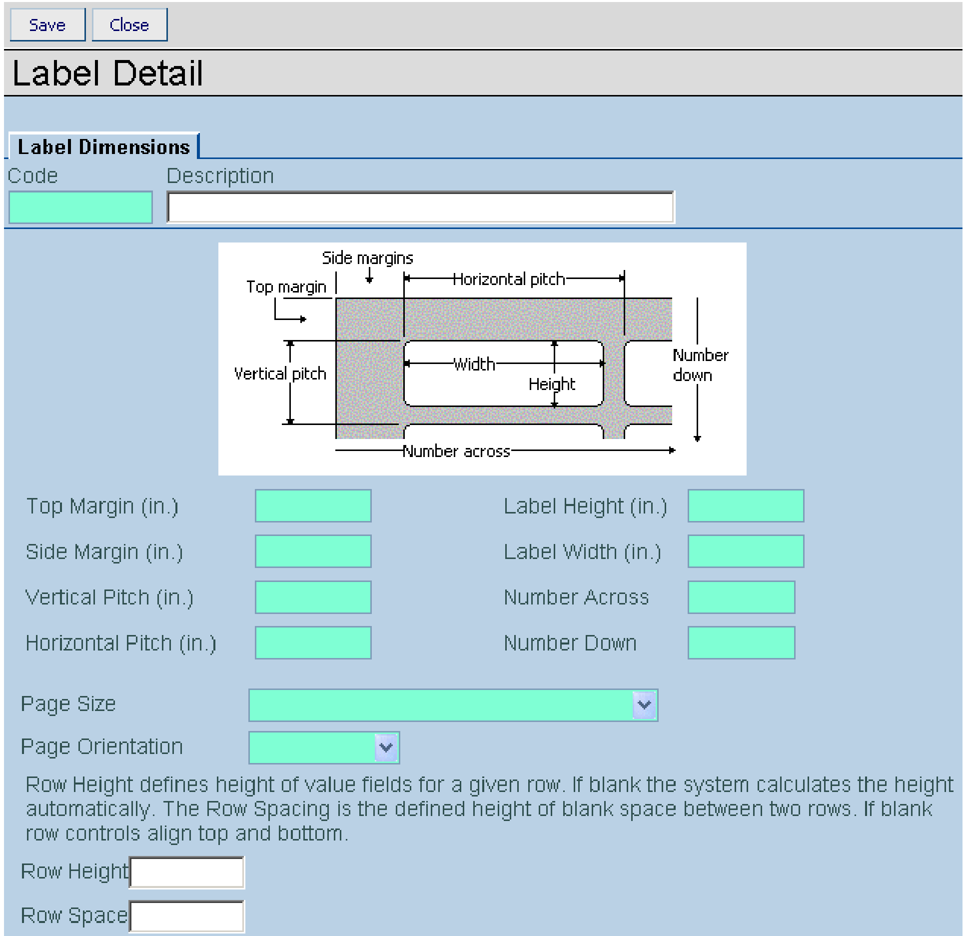
1. Go to **Synergy SIS > System > Setup > Label Detail**.



Label Detail Screen

2. Click the **Add** button at the top of the screen. The new **Label Detail** screen opens in a new window.

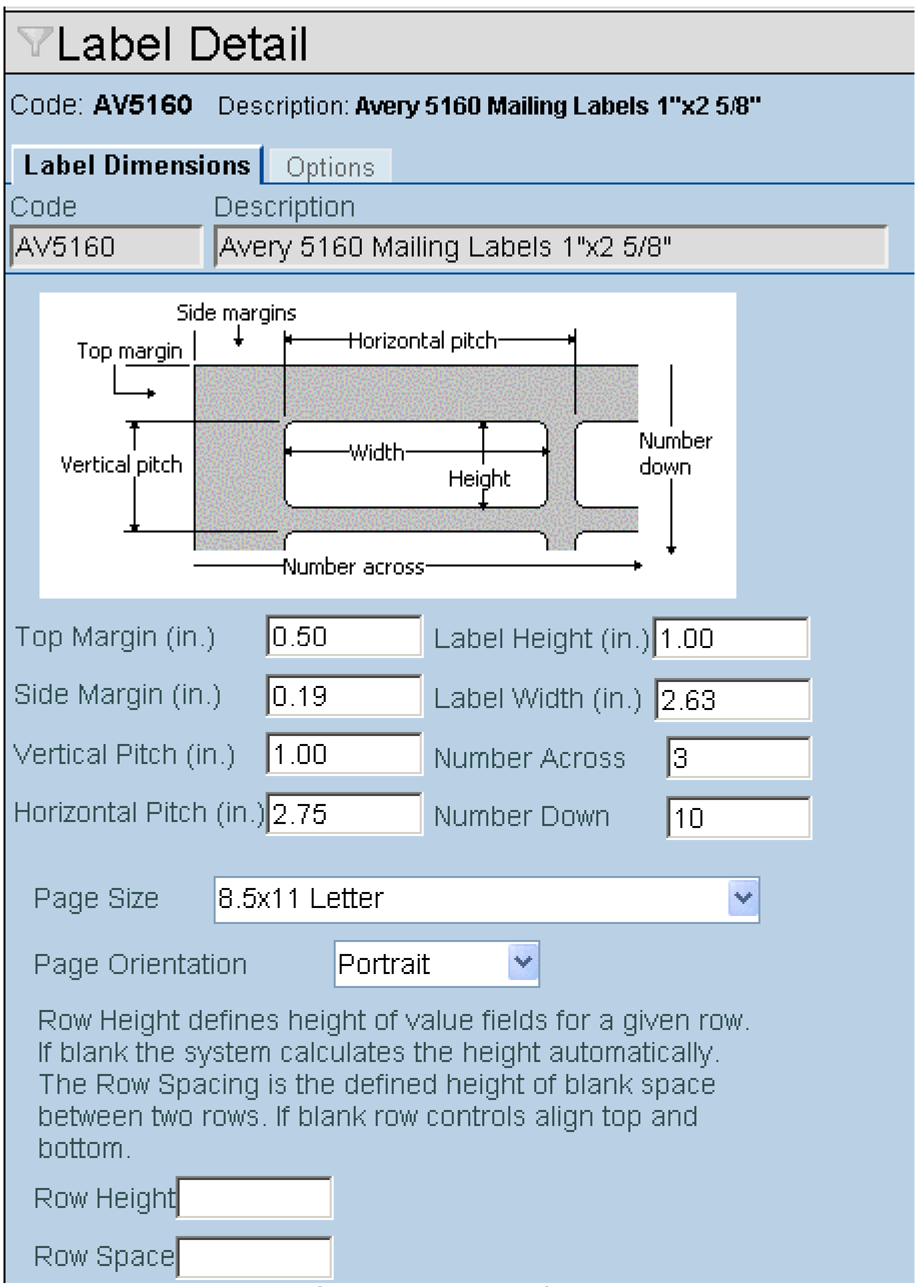
3. The fields highlighted in green are mandatory.



Adding a New Label

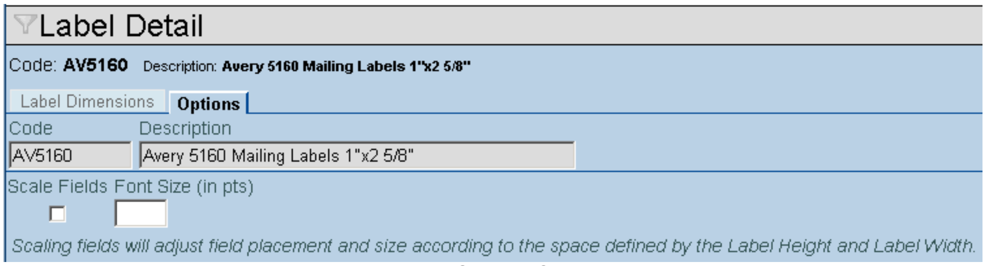
4. Enter a **Code** for the label such as AV5160, and enter a **Description** for the label that will be used in the lists in the other screens. A good description may include the manufacturer and product code of the label maker, along with the size of the label. For example, Avery 5160 Mailing Labels 1” x 2 5/8” would describe the Avery company’s 5160 labels. It may also be helpful to include the number of labels on a page.
5. Enter the space between the top of the first row of labels and the top of the page in inches in the **Top Margin** box. Enter the space between the left side of the first column of labels and the left side of the page in inches in the **Side Margin** box.
6. Enter the size of each label from top to bottom in inches in the **Label Height** box. Enter the size of each label from side to side in inches in the **Label Width** box.
7. Enter the distance between the top of the first row of labels and the top of the second row of labels in inches in the **Vertical Pitch** box. Enter the distance between the left edge of the first column of labels and the left edge of the second column of labels in inches in the **Horizontal Pitch** box.
8. Enter the number of labels in each row in the **Number Across** box, and the number of labels in each column in the **Number Down** box.

9. Select the **Page Size** of each sheet of labels from the list. The available page sizes are defined in the Page Size Detail screen explained later in this chapter. Select the printed orientation of each page, either Landscape or Portrait, from the Page Orientation list.
10. The **Row Height** and **Row Space** are optional. The Row Height indicates how high the text is in each row of information on each label, regardless of font size. If the font is larger than the height allotted, it will be cut off. The Row Space indicates how much blank space there is between each row of text on each label. If these are left blank, the system calculates these values automatically based on the size of the label.
11. Click the **Save** button at the top of the screen to save the new label definition.



Completed Label Detail Screen

12. Once the label has been saved, additional options may be specified by clicking on the **Options** tab.

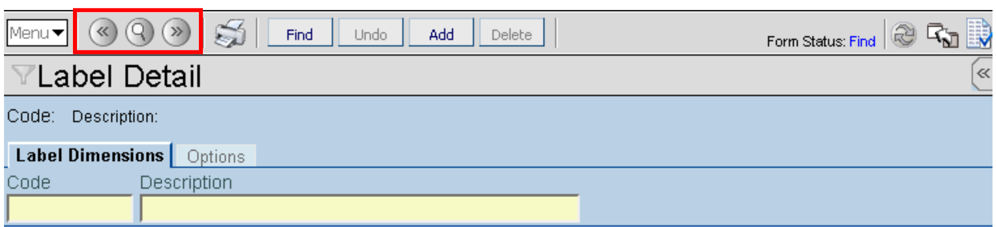


Label Detail Screen, Options Tab

13. To adjust the size of the font used for the information on the label automatically based on the label height and width, check the **Scale Fields** box.
14. To set the size of the information on the label to a specific size, enter the **Font Size** in points.
15. Click the **Save** button at the top of the screen to save the changes.

To edit an existing label definition:

1. Find the label to edit using either the **Scroll** buttons or **Find** mode.

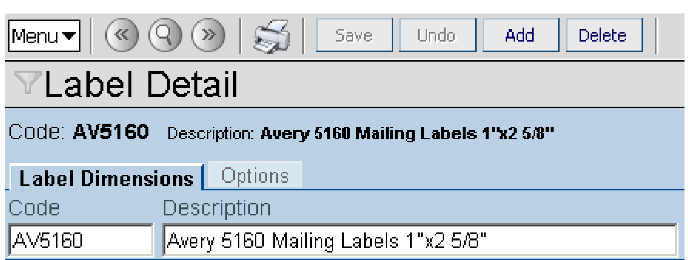


Finding a Label Definition

2. To edit the Code or the Description, click on the **Menu** button at the top of the screen and select **Edit Label Data**.

Menu Options

3. The fields turn white and can be edited by clicking in them.

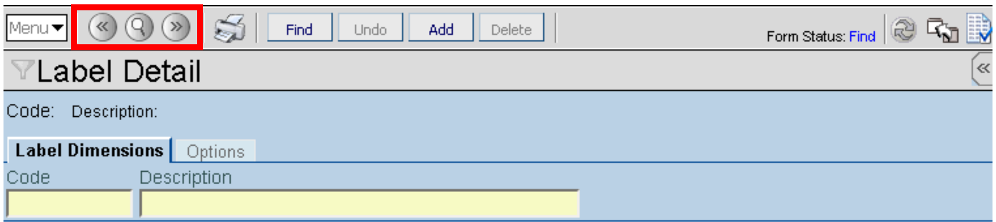


Editing the Code and Description

4. The other fields can also be edited simply by clicking in them and changing the text.
5. To save the changes, click the **Save** button at the top of the screen.

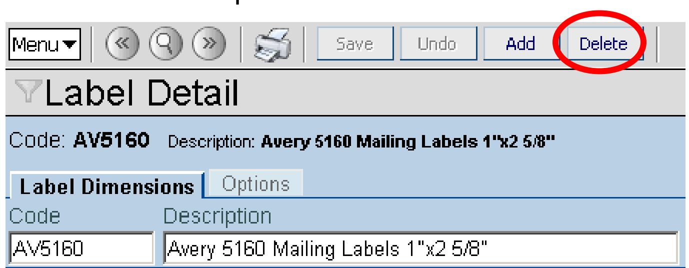
To delete a label definition:

1. Find the label to delete using either the **Scroll** buttons or **Find** mode.



Finding a Label Definition

2. Click the **Delete** button at the top of the screen.



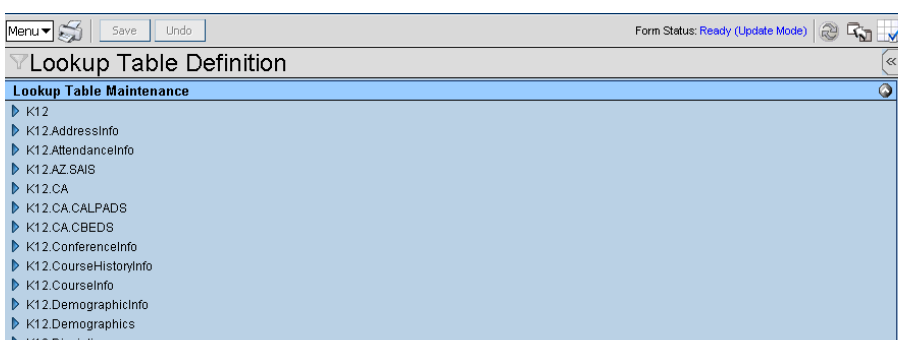
Deleting a Label Definition

LOOKUP TABLE DEFINITION

Most of the screens in Synergy SIS have lists where the user can select a value. The values displayed in each of these lists are stored in a lookup table. Each list has its own lookup table. Some of these lookup tables use hard-coded values that are core to the programming and cannot be changed. Other lookup tables can be edited to match the district's specifications. Lookup tables that cannot be changed are referred to as Product-Owned tables. The only information that can be added or changed to a product-owned lookup table is the value that matches the information in the lookup table in Synergy SIS to the codes used in another student information system. This allows data to be converted correctly to Synergy SIS.

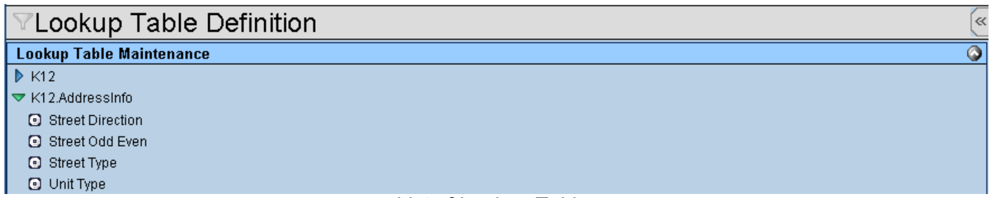
To edit or examine a lookup table:

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



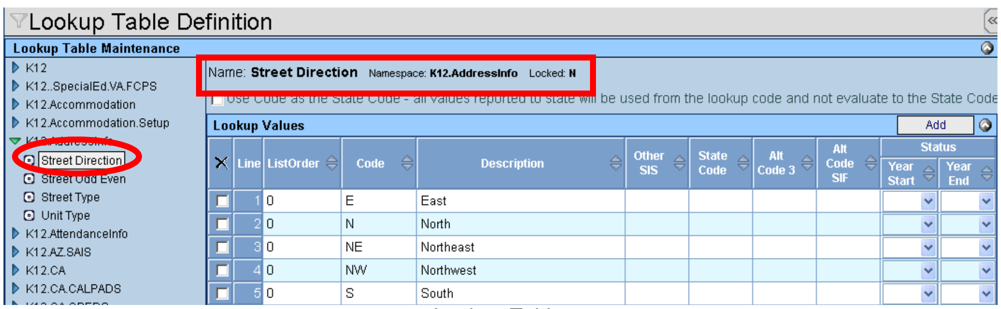
Lookup Table Definition Screen

2. Find the table that needs to be changed by clicking nodes under **Lookup Table Maintenance**. Most of the tables used in the screens are found under the nodes that start with K12, followed by a brief description of the type of information. Information that is used in more than one screen or that is part of the setup of Synergy SIS generally are found under the Revelation nodes. Tables that are specific to one client are stored under the nodes that start with Z.



List of Lookup Tables

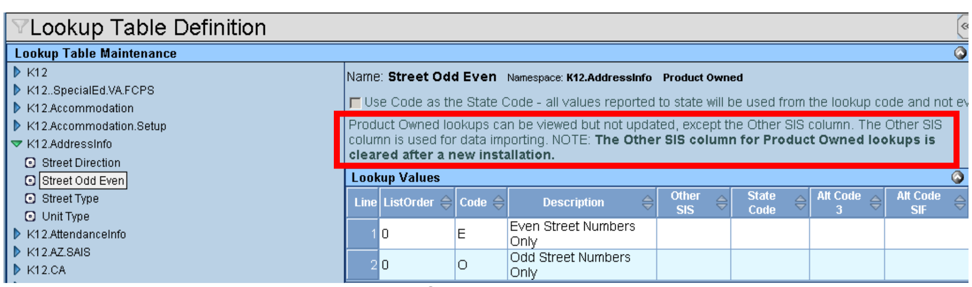
3. To see the values in the lookup table, click the table name.



Lookup Table

4. The values in the lookup table appear in the right-side of the screen. The **Name** of the table is listed at the top, and the **Namespace** lists the business object to which the table belongs. If the table is locked for editing, it is also indicated at the top of the table in the **Locked** value.

5. Click the **Add** button to add a new code, or click in the box in the **X** column to delete a code. If the table is product-owned and cannot be changed, a note appears at the top of the lookup table.



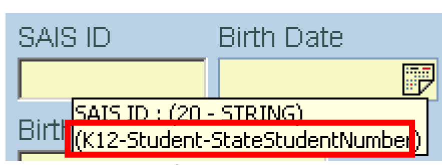
Product-Owned Lookup Table

> **Note** – The only value that can be entered for a product-owned lookup table is the **Other SIS**. This is the code used in the previous student information system for the lookup table value. The **Other SIS** column for all product-owned lookup tables is cleared each time Synergy SIS is installed.

6. The order in which the values are displayed can be set by entering the order number in the **ListOrder** column. If the numbers in the **ListOrder** field are the same or are all blank, the **Code** is used to sort the list, and then the **Description**.
7. Enter an abbreviation for the lookup table value in the **Code** column. This value must be unique, but it is only used internally to link the tables in the database and is not displayed. It can be the same as the code used by the state but it can also be the district's own coding structure.
8. Enter the description of the code in the **Description** column.
9. The **Other SIS** column is used to import data during the conversion process from another student records system. Enter the code used in the old system in this column.
10. If the code chosen is different than the state code, enter the actual code used by the state in the **State Code** column.
11. If appropriate, a start date and end date may be entered for the code in the **Status** column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but is not available for selection for new transactions in the screen. For example, if a code is no longer valid for transactions at the state beginning FY2008, select 2008 for the end year.
12. The **Alt Code 3** is used to denote a code as having a special value, or used to indicate an additional code for data integration with another system.
13. The code used in the SIF (Schools Interoperability Framework) schema for this value should be entered in the **Alt Code SIF**.
14. The checkbox at the top of the table **Use Code as the State Code** is generally not used. By default, the code in the Code column is used for the state transactions, unless there is a code entered in the State Code. If a code is entered in the State Code column, that code is used.
15. Click the **Save** button at the top of the screen to save any changes.

This provides a general overview of the lookup tables. Instructions for the lookup tables used in each screen can be found in the guide that explains that screen.

To discover the name of any lookup table in a screen, hover the mouse over the list and a yellow box will pop-up with the name of the table.



Name of the Table Pop-Up

This functionality is referred to as showing the business object (field/lookup table name) on hover. This functionality needs to be enabled for each user through the **Security Settings** tab on the **User** screen. Check the box labeled **Show BO On Mouseover**. For more about editing the **User** screen, see the chapter on Staff and Users in this guide.

MAIL MERGE DEFINITION AND MAIL MERGE DISTRICT DEFINITION

Note – This section describes the original mail merge functionality in Synergy SIS, now known as Mail Merge 1.0. Information about Mail Merge 2.0 is in a separate guide.

Setting up a mail merge consists of two steps. The first step is creating the letter or form in Microsoft Word, and the second step is adding the document to Synergy SIS and defining it as a mail merge document.

To create the letter or form, start a new document in any version of Microsoft Word. Write the letter, and then add the fields to be used when merging the letter with the information from the student's record. The field names need to be entered in the following format:

<<FieldName>>


Edupoint School District

May 12, 2009

To the parents of: «FirstName» «LastName»
«Address»
«CityStateZipcode»

RE: Discipline Incident, «Description», occurring on «IncidentDate» at «IncidentTime»

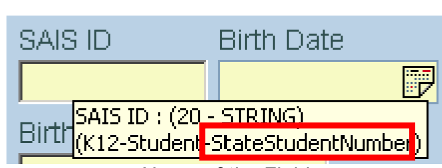
Dear Parent(s)/Guardian(s):

After investigating the incident, I have decided to recommend to the Board of Education that «FirstName» should be expelled from the Edupoint School District.

The student may be represented by counsel, and may testify, call witnesses,

Sample Mail Merge Letter

Common field names to use are: FirstName, LastName, Address, and CityStateZipCode. To discover the field name for any field in a screen, pause the pointer over a field. A yellow box appears with the name of the field.



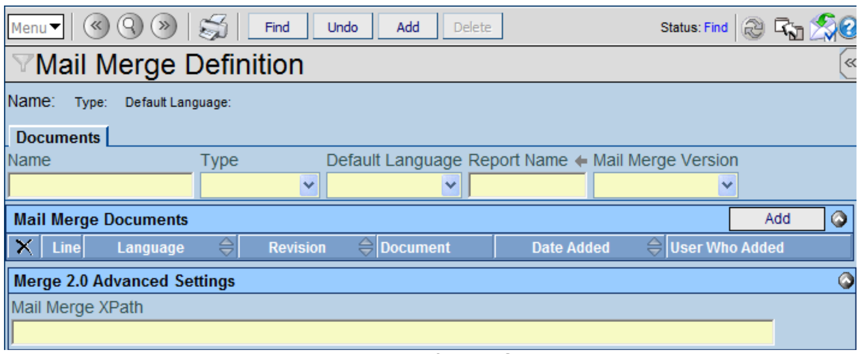
Name of the Field

This functionality is referred to as showing the business object (field name) on hover. This functionality needs to be enabled for each user through the **Security Settings** tab on the

User screen. Check the box labeled **Show BO On Mouseover**. For more about editing the **User** screen, see the chapter on Staff and Users in this guide.

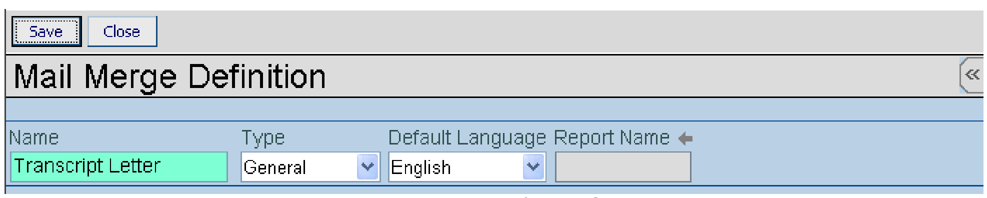
Once the letter or form has been created, it needs to be added to Synergy SIS as a mail merge document. This is done using either the Mail Merge Definition screen to define a letter for a specific school, or the Mail Merge District Definition screen to set up the letter for the entire district. Both screens work exactly the same, so the following instructions can be used with either screen. To add the document to Synergy SIS:

1. Go to **Synergy SIS > System > Setup > Mail Merge Definition**. Be sure the focus is set to the correct school when not setting the district definition.



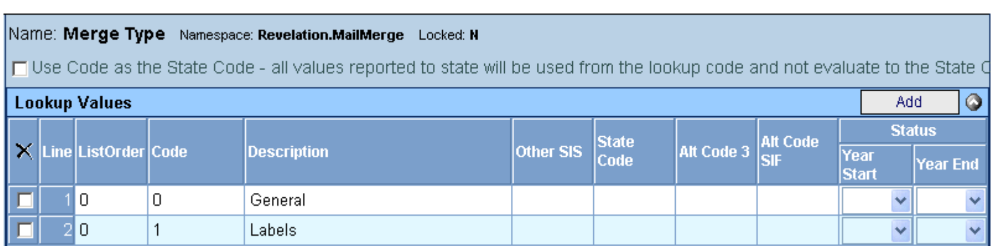
Mail Merge Definition Screen

2. Click the **Add** button at the top of the screen. The new **Mail Merge Definition** screen opens.
3. In the **Name** box, enter a description of the mail merge for display in other screens.



New Mail Merge Definition Screen

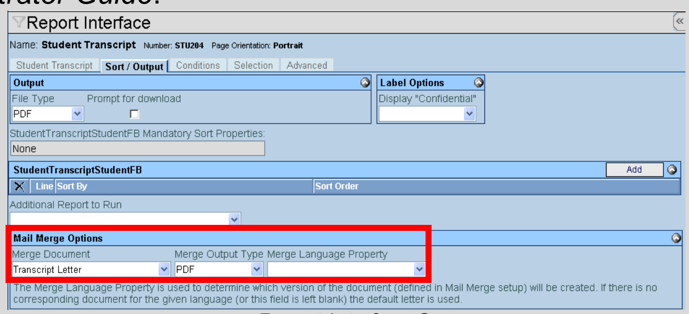
4. Select the **Type** of mail merge from the list. The district can define the categories to be available for the Type list by modifying the lookup table **Revelation.MailMerge.MergeType** as outlined in the Lookup Table Definition section of this chapter.



Merge Type Lookup Table

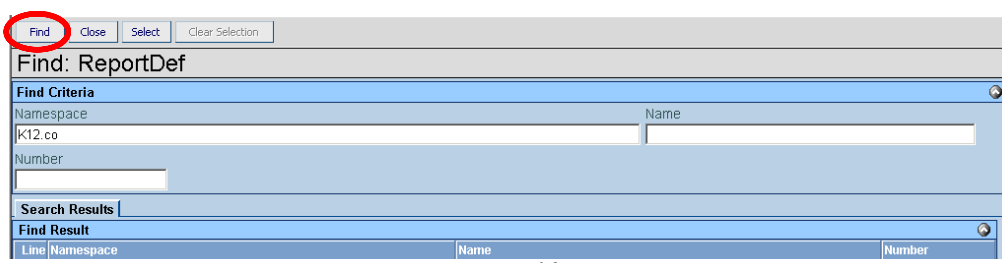
5. Select the **Default Language** from the list to be used when no other language is selected when printing the mail merge.
6. To associate the mail merge with a specific report, click the gray arrow next to **Report Name**. The **Find: ReportDef** screen appears.

Note – Associating a mail merge document with a report allows the mail merge to print at the same time as the report so that the information in the mail merge document matches the information in the report. For example, the mail merge document could be a cover letter sent home to parents accompanied by a report card or disciplinary profile. Once the definition has been created and associated with the report, the mail merge definition can be selected on the **Sort/Output** tab of the Report Interface for that report. There are also special mail merges that can be created for Disciplinary Action Forms and Attendance Letters. For more information about these special mail merges, see the *Synergy SIS – Discipline & Conference Administrator Guide* and the *Synergy SIS – Attendance Administrator Guide*.



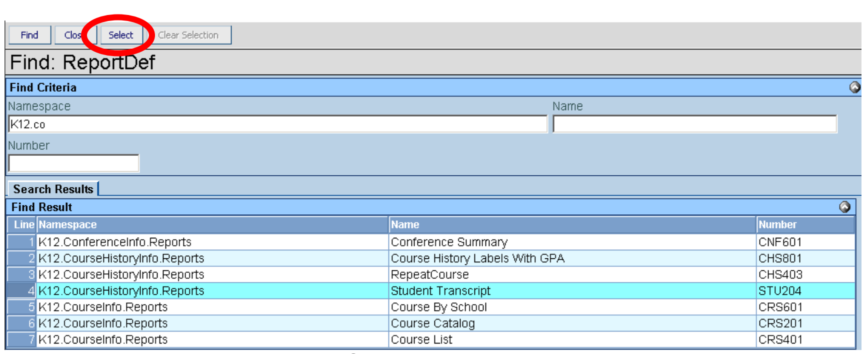
Report Interface Screen

7. To find a report, enter all or part of the **Namespace** of the report such K12.Discipline, part of the **Name** of the report, or part of the report **Number**. Once the criteria are entered, click the **Find** button.



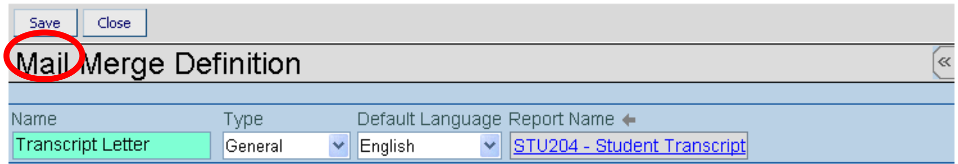
Find ReportDef Screen

8. In the **Find Result** grid, click the report, and click the **Select** button at the top of the screen.



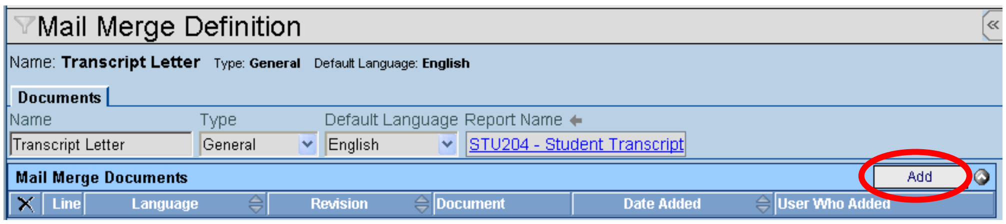
Selecting a Report

9. In the **Mail Merge Version** list, click **1.0**.
10. Click the **Save** button at the top of the screen.



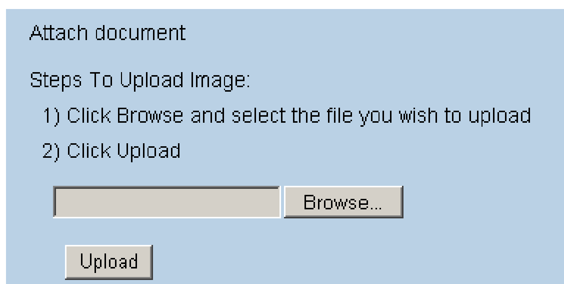
Saving the Mail Merge Definition

11. To attach the mail merge Word document, click the **Add** button in the **Mail Merge Documents** section. The **Attach document** box opens.



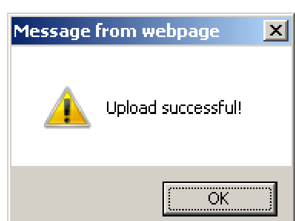
Adding a Mail Merge Document

12. Click the **Browse** button to locate and select the Word document.



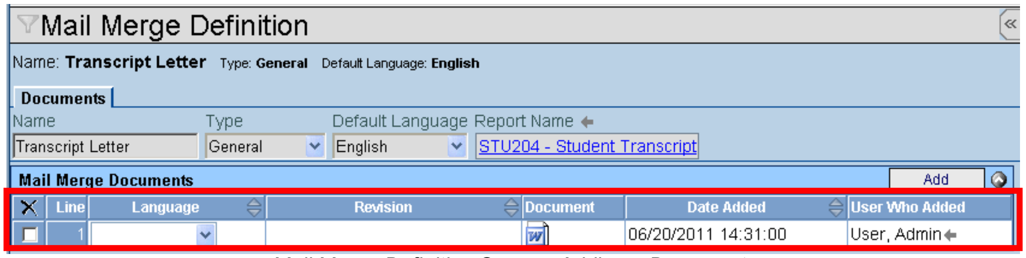
Attach Document Box

13. Click the **Upload** button to upload the document to Synergy SIS. A message indicates the successful upload.
14. Click the **OK** button.



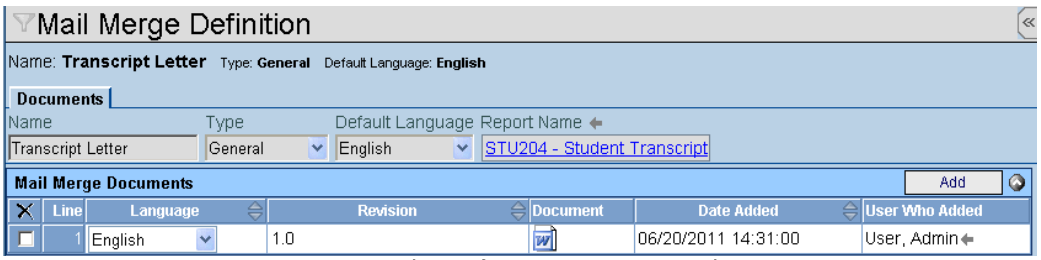
Upload Successful

15. In the new line in the **Mail Merge Documents** section, select the **Language** in which the document is written.



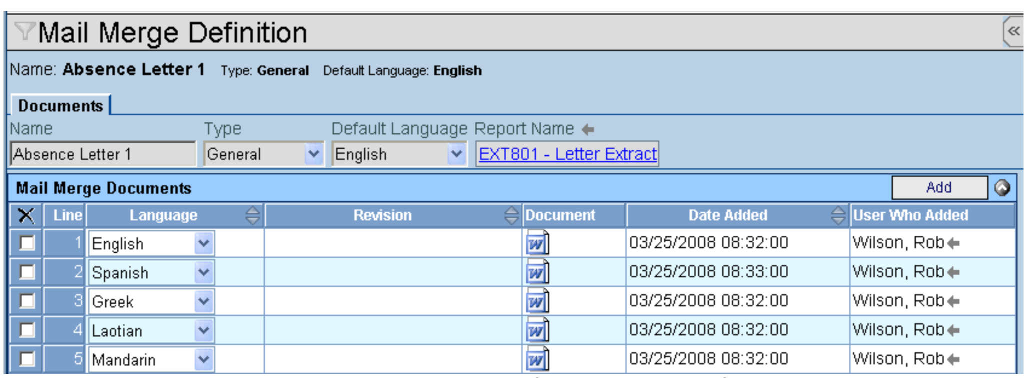
Mail Merge Definition Screen, Adding a Document

16. If desired, enter a **Revision** number for the document.
17. Click the **Save** button at the top of the screen.



Mail Merge Definition Screen, Finishing the Definition

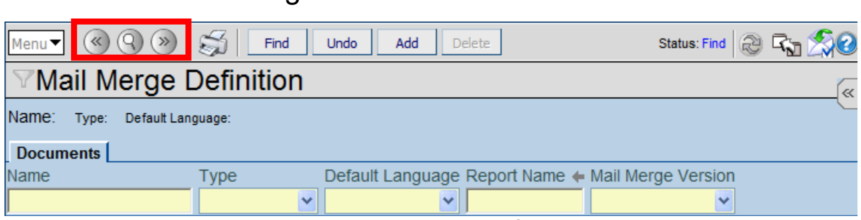
Multiple documents can be added to each definition in different languages. Only one document should be added for each language. At the time the mail merge is printed, the document in the language of the student's home language or primary language is printed. If a document is not available in the student's home language, the document for the default language is printed.



Multiple Languages Available for a Mail Merge Definition

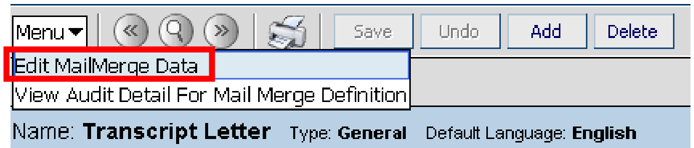
To edit a Mail Merge definition:

1. Find the definition to edit using either the Scroll buttons or Find mode.

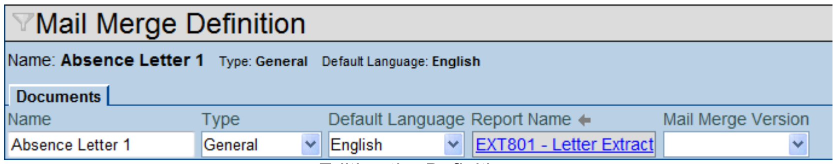


Finding a Mail Merge Definition

2. To edit the top row of information (the Name, Type, Default Language, or Report Name), click the **Menu** button at the top of the screen and select **Edit MailMerge Data**.



Menu, Edit MailMerge Data Option

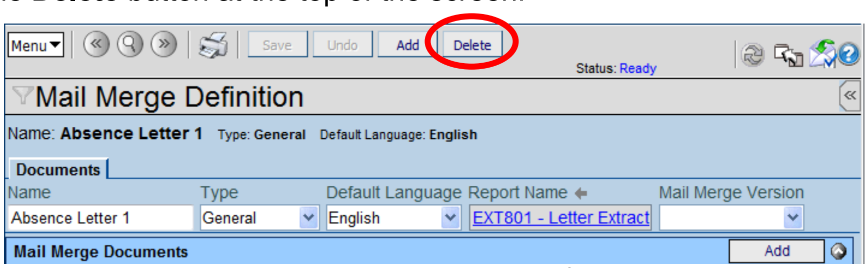


Editing the Definition

3. Click the **Save** button at the top of the screen.

To delete the entire Mail Merge Definition:

1. Delete all attached documents.
2. Click the **Delete** button at the top of the screen.

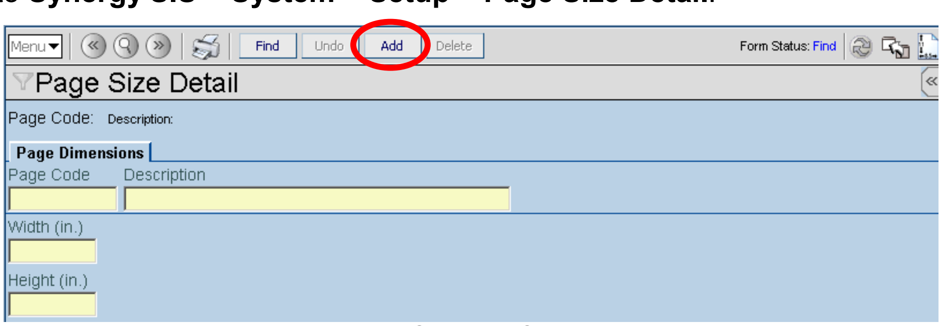


Deleting the Entire Mail Merge Definition

PAGE SIZE DETAIL

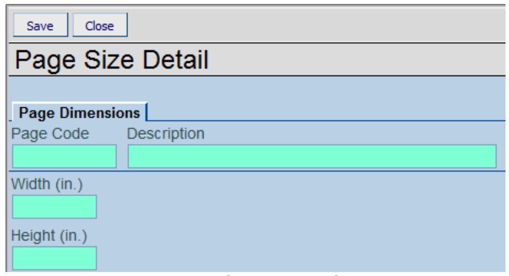
When printing reports and other output, users select he size of the paper to be used, such as Letter, from a list. The page size lists throughout Synergy SIS are populated by Page Size Detail definitions. To create a new page size to be available:

1. Go to **Synergy SIS > System > Setup > Page Size Detail**.



Page Size Detail Screen

2. Click the **Add** button at the top of the screen. The new **Page Size Detail** screen opens.

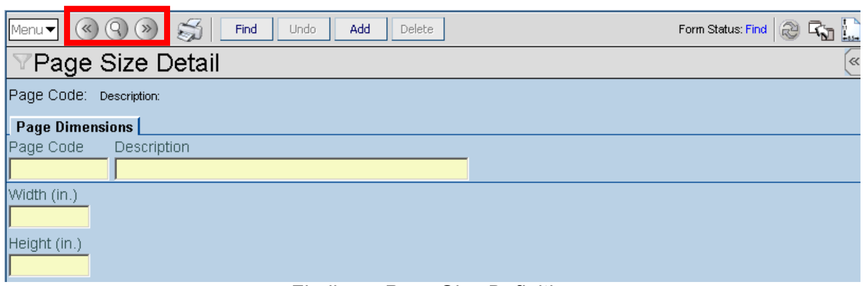


New Page Size Detail Screen

3. Enter a code for the page size definition in the **Page Code** box. This code appears in many lists, so it should be a code that makes the page size easily recognizable.
4. Enter a longer description of the definition in the **Description** box.
5. Enter the **Width** and **Height** of the page in inches.
6. Click the **Save** button at the top of the screen to save the definition.

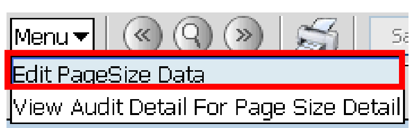
To edit an existing page size definition:

1. Find the label to edit using either the Scroll buttons or Find mode.



Finding a Page Size Definition

2. To edit the **Page Code** or the **Description**, click on the **Menu** button and select **Edit PageSize Data**.



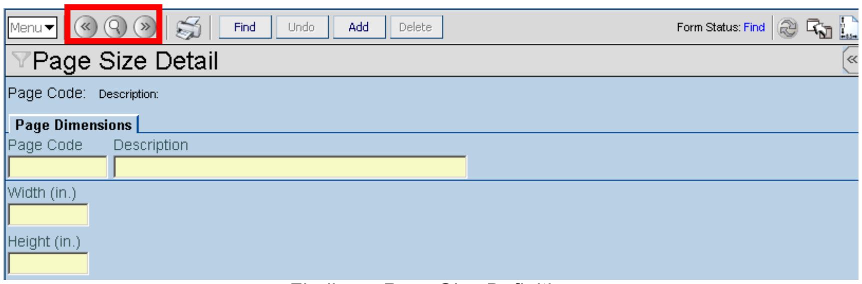
Page Size Detail, Menu Options

To edit the Width and Height, Edit PageSize Data is not required.

3. Click the **Save** button at the top of the screen.

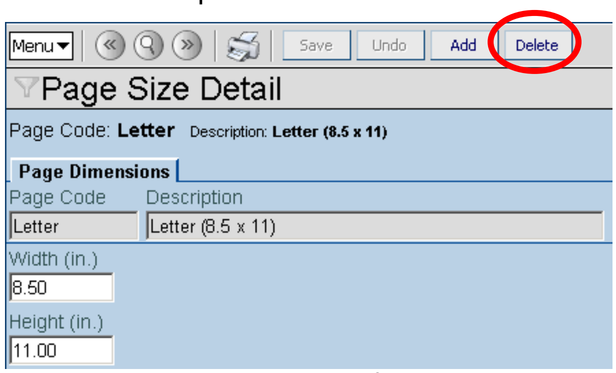
To delete a page size definition:

1. Find the page size to delete using the Scroll buttons or Find mode.



Finding a Page Size Definition

2. Click the **Delete** button at the top of the screen.



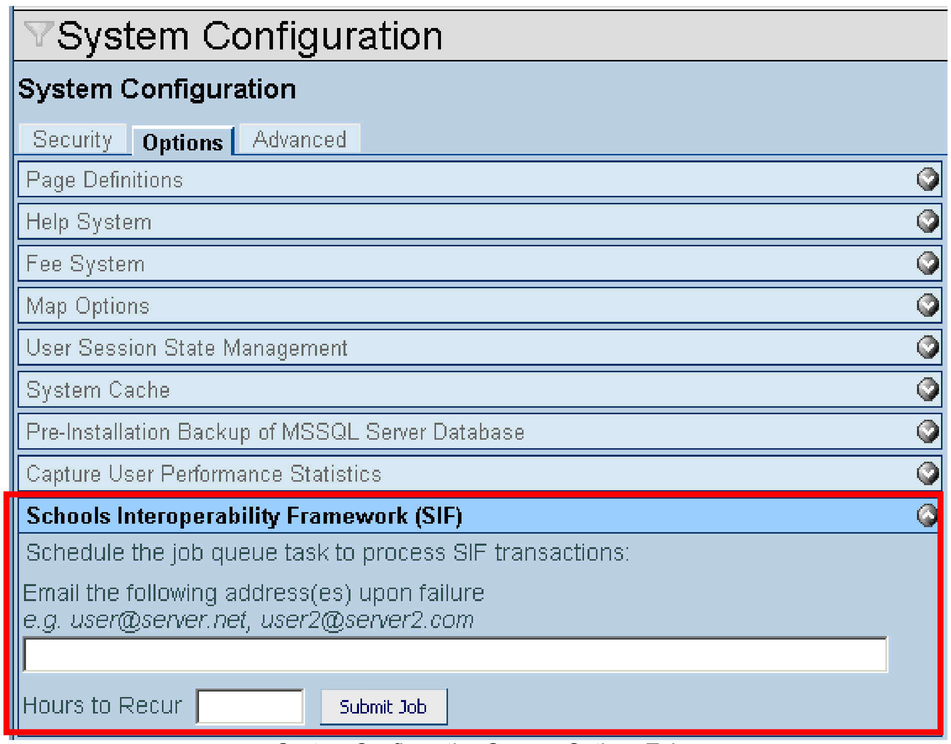
Deleting a Label Definition

SIF (SCHOOLS INTEROPERABILITY FRAMEWORK)

SIF stands for Schools Interoperability Framework, which is a standard established for data exchanges between software systems for schools. Synergy SIS supports the SIF standard, and can import data in SIF format. The Synergy SIS SIF Agent must be purchased separately.

SIF transactions are scheduled through the **System Configuration** screen. To set up or adjust the SIF transactions process:

1. Go to **Synergy SIS > System > Setup > System Configuration**.
2. Click the **Options** tab, and scroll to the **Schools Interoperability Framework (SIF)** section.

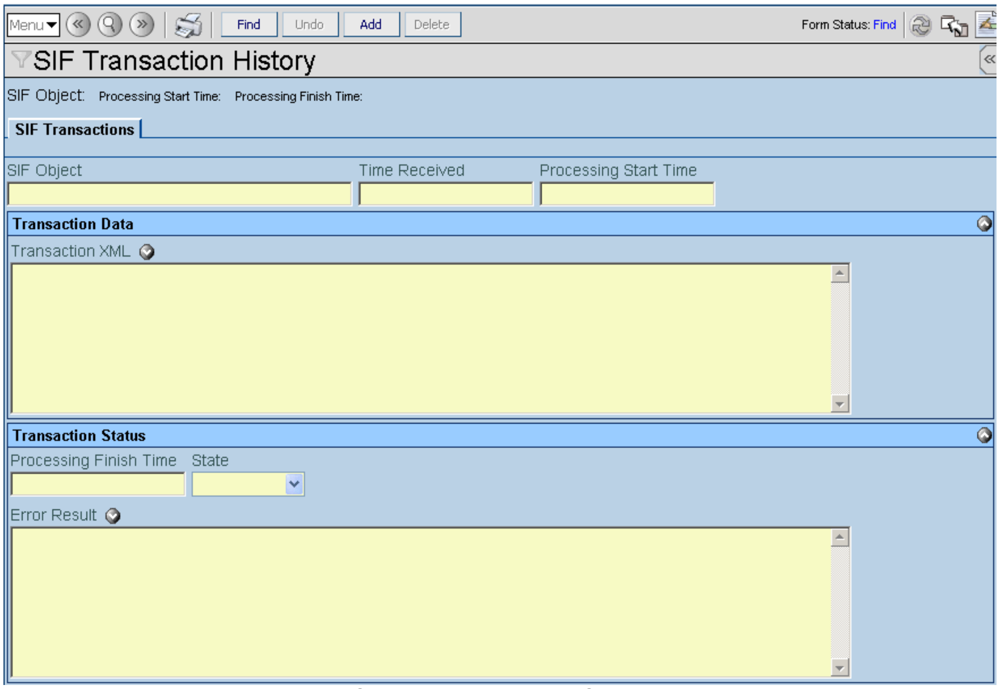


System Configuration Screen, Options Tab

3. In the box provided, enter the email addresses of staff to be notified if the SIF process has an error. Separate addresses with commas.
4. Enter the number of hours between SIF processes in the **Hours to Recur** box.
5. Click the **Save** button at the top of the screen.
6. Click the **Submit Job** button to schedule the SIF process.

The list of SIF transactions that has been processed can be seen in the **SIF Transaction History** screen. To view the previous SIF transactions:

1. Go to **Synergy SIS > System > SIF > SIF Transaction History**.

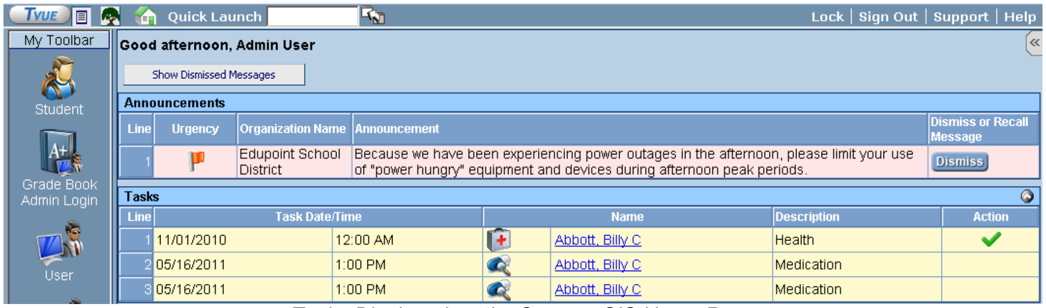


SIF Transaction History Screen

2. To find a transaction, use the Scroll buttons or Find mode.
3. The **SIF Object** is the type of information included in the transaction, such as StudentGrade or SectionInfo. For the possible list of objects, see the official SIF website at http://www.sifinfo.org.
4. The time the data was received from the other software system is listed in the **Time Received** box, and the time at which Synergy SIS began processing the data is listed in the **Processing Start Time** box.
5. The data that was imported into Synergy SIS is shown in the SIF XML schema format in the **Transaction XML** box.
6. The time the SIF transactions finished processing is shown in the **Processing Finish Time** box.
7. The current status of the transactions process is listed in the **State** list. If the job is **Complete**, it finished with no errors. If it shows **Error**, it finished with errors. The errors will be listed in the **Error Result** box.
8. If the state is **In Progress**, the job is still running. If the process shows Skipped, Not Handled, the process was either manually cancelled or some other system error caused the job not to process. **Waiting** mean the process has not started yet.

TASK DEFINITION

Tasks in Synergy SIS provide "to-do" lists on the home page. For example, a task may remind a school nurse when to administer medication to a student.



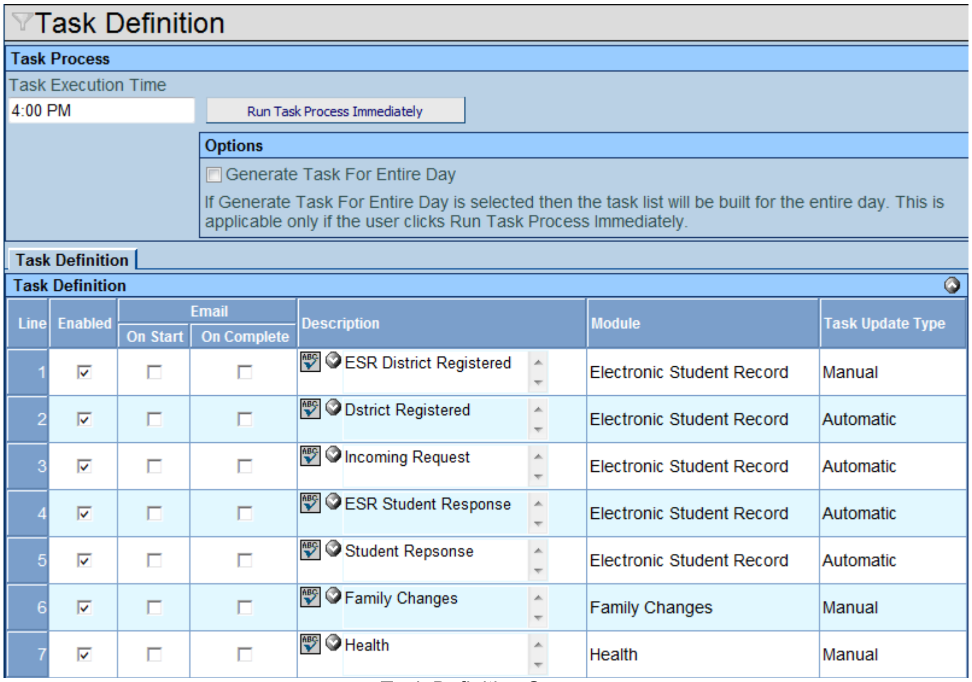
Tasks Displayed on the Synergy SIS Home Page

Examples of tasks that can be displayed:

- Follow-ups to student health incidents as defined by the **End Date** of the **Accident Detail** tab of the **Nurse's Log** tab on the **Health** screen
- Follow-ups to student conferences as defined by the **Follow-Up Date** in the **Student Conference** screen
- Follow-ups to student discipline incidents as defined by the **Follow-Up Date** in the **Student Incident** screen
- Medication and procedures as scheduled on the **Medications** tab of the **Health** screen
- **U**pdates to student information submitted by parents through the ParentVUE portal to be reviewed in the **Review PVUE Updates** screen
- Updates to a student's change of address caused by changing the address of a sibling at another school.

The tasks are generated once each day by a process run through the Job Queue on the process server. The task process can also be run manually. To turn on the task process and schedule when the process runs:

1. Go to **Synergy SIS > System > Setup > Task Definition**.

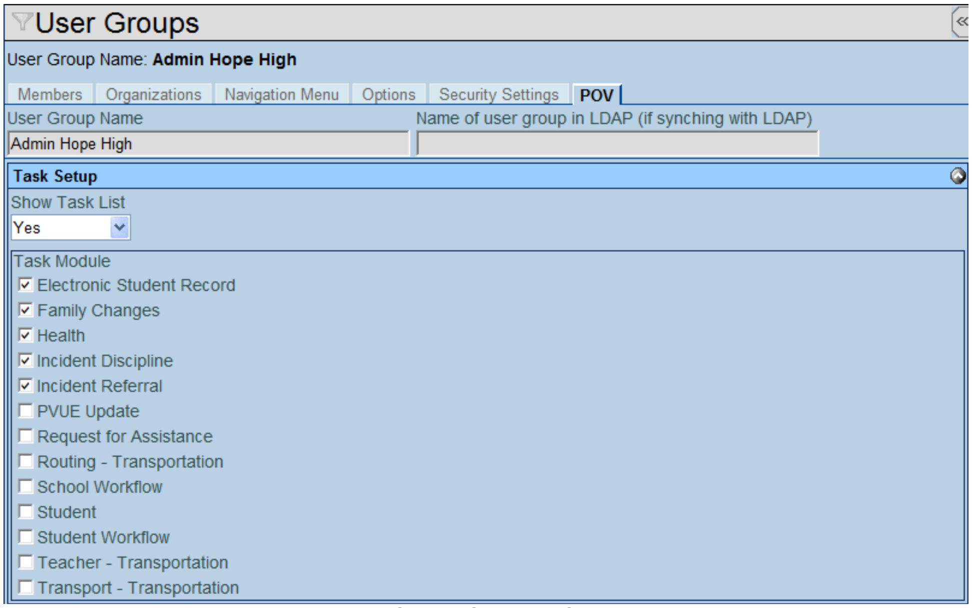


Task Definition Screen

2. In the **Task Execution Time** field, enter in HH:MM AM/PM format the time when tasks that are enabled and executed automatically should be run.
3. To enable a task generation process, check the box in the **Enabled** column.
4. To generate email when the process starts and ends, check the boxes in the **On Start** and **On Complete** columns.
5. In the **Description** column, enter a description to appear in the list of tasks available to the user in the **User Profile** screen, on the **POV** tab.
6. Click the **Save** button at the top of the screen to save the changes.
7. If you are running the task process manually and want to build tasks for the entire day, check the **Generate Task For Entire Day** box.
8. To run the tasks outside of the scheduled time, click the **Run Task Process Immediately** button.

Once tasks have been enabled, they need to be added to the users' home pages by a system administrator or the users themselves. The tasks can be turned on at the user group level or at the user level. To turn on tasks for a user group:

1. Go to **Synergy SIS > System > User > User Groups**, and click the **POV** tab.

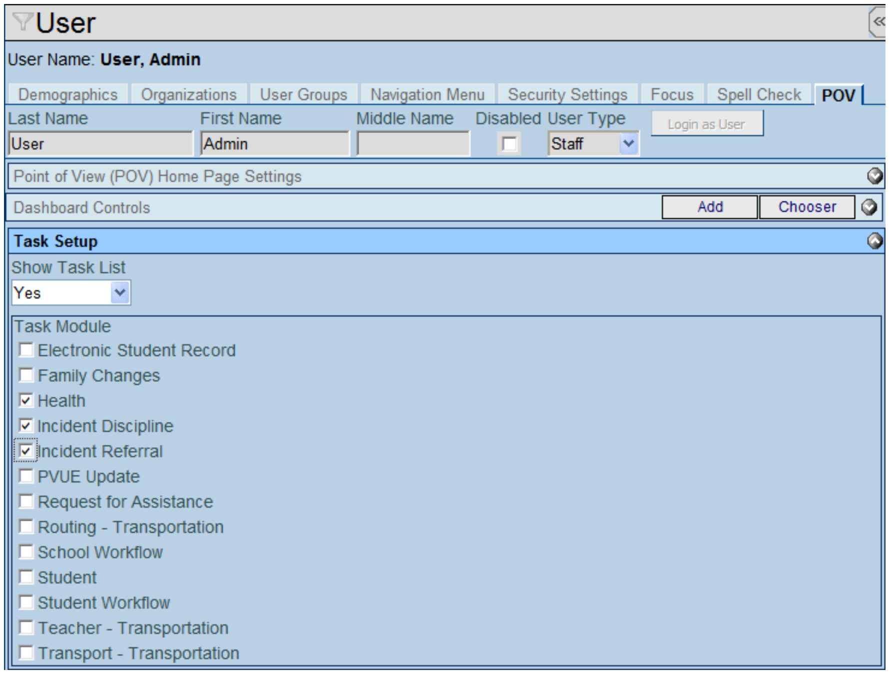


User Groups Screen, POV Tab

2. To display the task list on the home page of all users in the group, select **Yes** in the **Show Task List** list.
3. Check the box for each **Task Module** to be displayed on the home page.
4. Click the **Save** button at the top of the screen.

To turn on tasks at the user level:

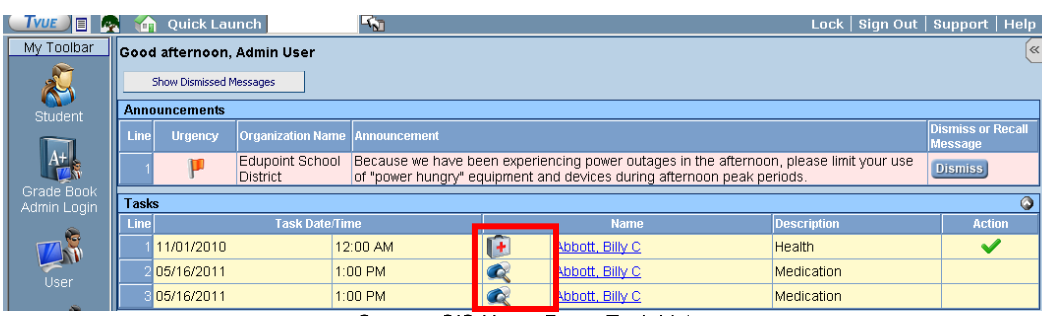
1. Go **Synergy SIS > System > User > User**, and click the **POV** tab.



User Screen, POV Tab

2. To display the task list on the home page of the user, select **Yes** in the **Show Task List** list.
3. Check the box for each **Task Module** to be displayed on the home page.
4. Click the **Save** button at the top of the screen.

When tasks are displayed on the home page, they can be recorded by clicking the icon to the left of the student's name. The icon is different for each type of task.



Synergy SIS Home Page, Task List

Clicking the icon opens the primary screen for the task. For example, clicking a Medication task opens the **Medication and Service Monitor** screen.

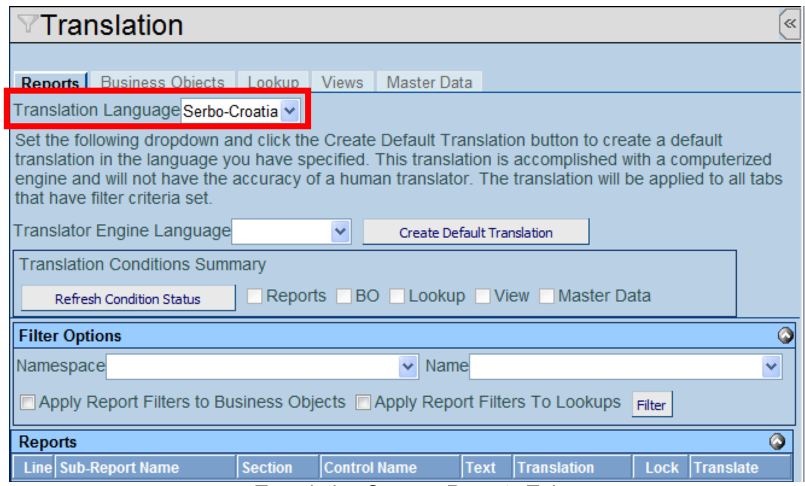
TRANSLATION

The **Translation** screen enables you to create machine-translated versions of documents and other elements in Synergy. These translations do not have the accuracy of those done by human translators, but you can edit them to improve their quality.

You can translate a report and various data elements that may appear in the report, such as business objects, values from lookup tables, and common data found in the master database table.

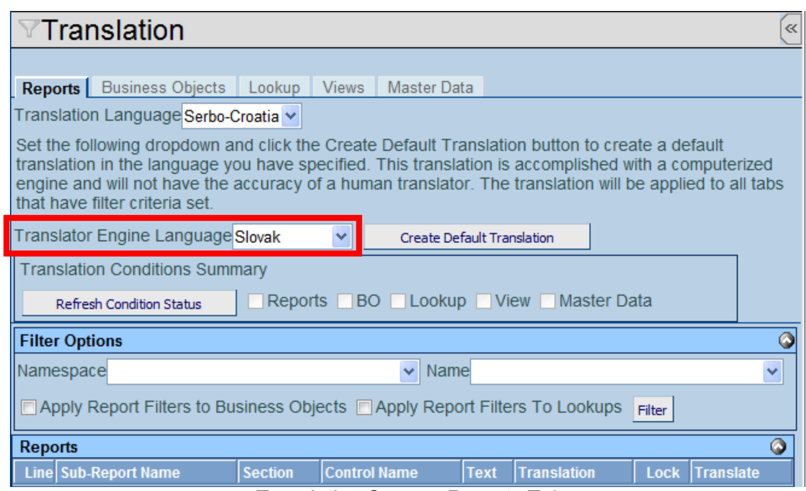
To translate a report:

1. Go to **Synergy SIS > System > Setup > Translation**.
2. In the **Translation Language** list, select the desired language to translate into.



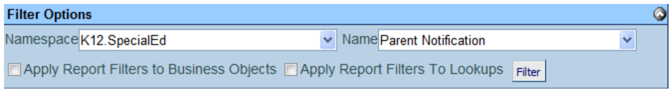
Translation Screen, Reports Tab

3. In the **Translator Engine Language** list, select from the available languages for machine translation. It is possible that the language from step 2 is not in this list, and you must select the nearest approximation.



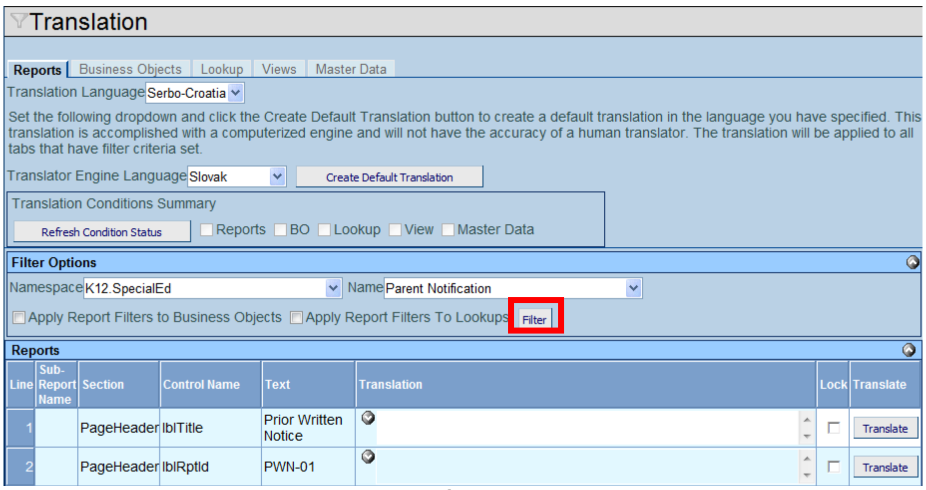
Translation Screen, Reports Tab

4. In the **Filter Options** section, use the **Namespace** and **Name** lists to find the report to translate.



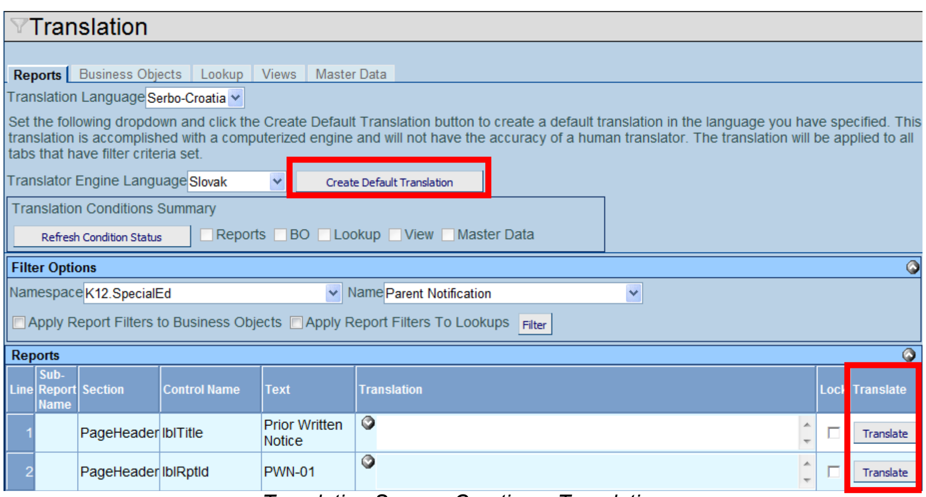
Translation Screen, Filtering

5. To translate business objects that can appear in the selected report, check the **Apply Report Filters to Business Objects** box.
6. To translate lookup table values that can appear in the selected report, check the **Apply Report Filters To Lookups** box.
7. Click the **Filter** button. Text items that appear in the report are added to the **Reports** grid.



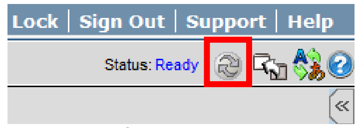
Translation Screen, Filtering

8. Click the **Create Default Translation** button to translate all items, or click a **Translate** button to translate a single item.



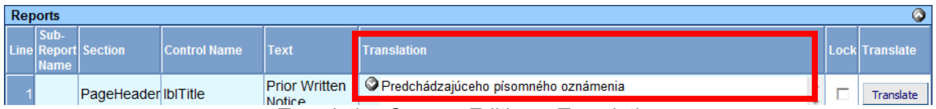
Translation Screen, Creating a Translation

9. If the translations do not appear in the **Translation** column of the **Reports** grid, click the Refresh View icon at the top of the page.



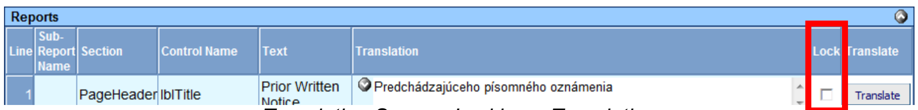
Refresh View Icon

10. Edit the translation in the **Translation** column if necessary.



Translation Screen, Editing a Translation

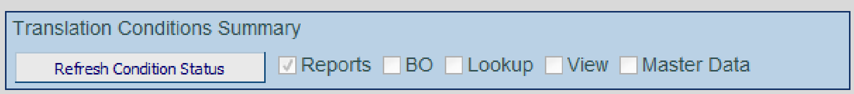
11. Check the **Lock** box to prevent further editing, and click the **Save** button at the top of the screen.



Translation Screen, Locking a Translation

The other tabs on the **Translation** screen are for translating items that might appear in reports. The process for translating those items is very similar to the process for the report text itself. (However, there is rarely a reason to translate text from Synergy screens, using the **Views** tab.)

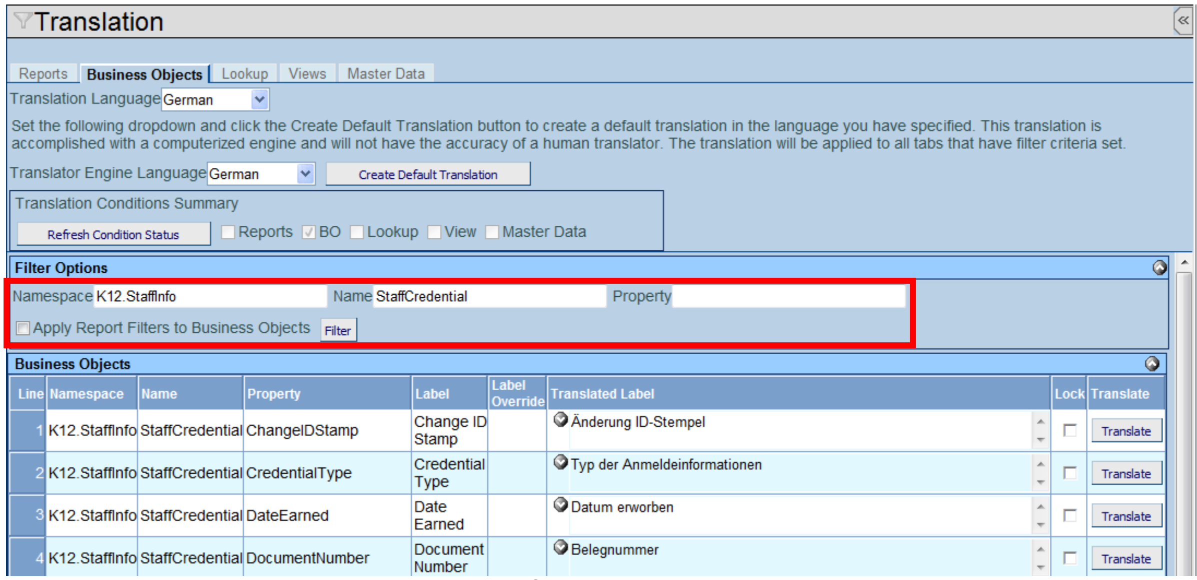
Tip – As you translate, the boxes under **Translation Conditions Summary** on all tabs indicate your progress. These boxes are read-only. To refresh the display of these boxes, click the **Refresh Condition Status** button.



Translation Conditions Summary

Example: Business Objects

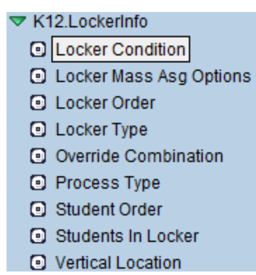
You can translate business objects associated with staff credentials. On the **Business Objects** tab, enter filters as shown here.



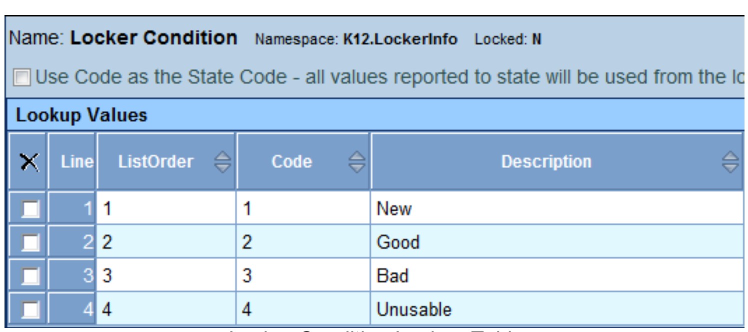
Business Objects Translations

Example: Lookup

You can translate the descriptions of states of repair for students' lockers. These descriptions are found on the **Lookup Table Definition** screen, in the namespace: **K12.LockerInfo**, in the lookup table **Locker Condition**.

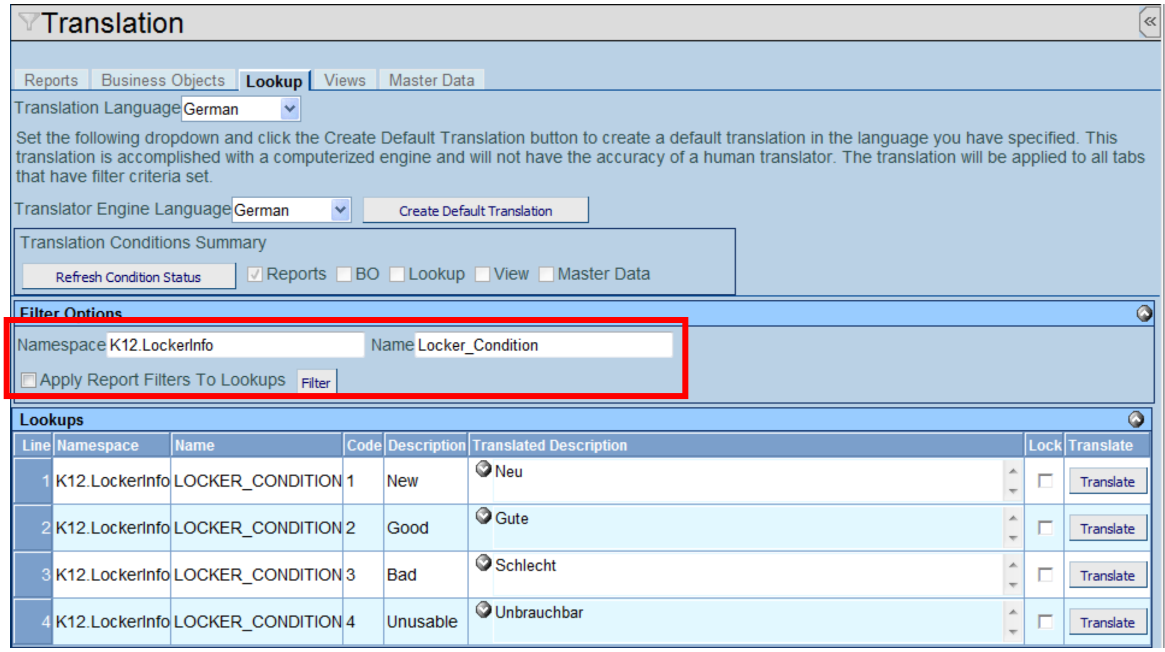


Lookup Tables in the K12.LockerInfo Namespace



Locker Condition Lookup Table

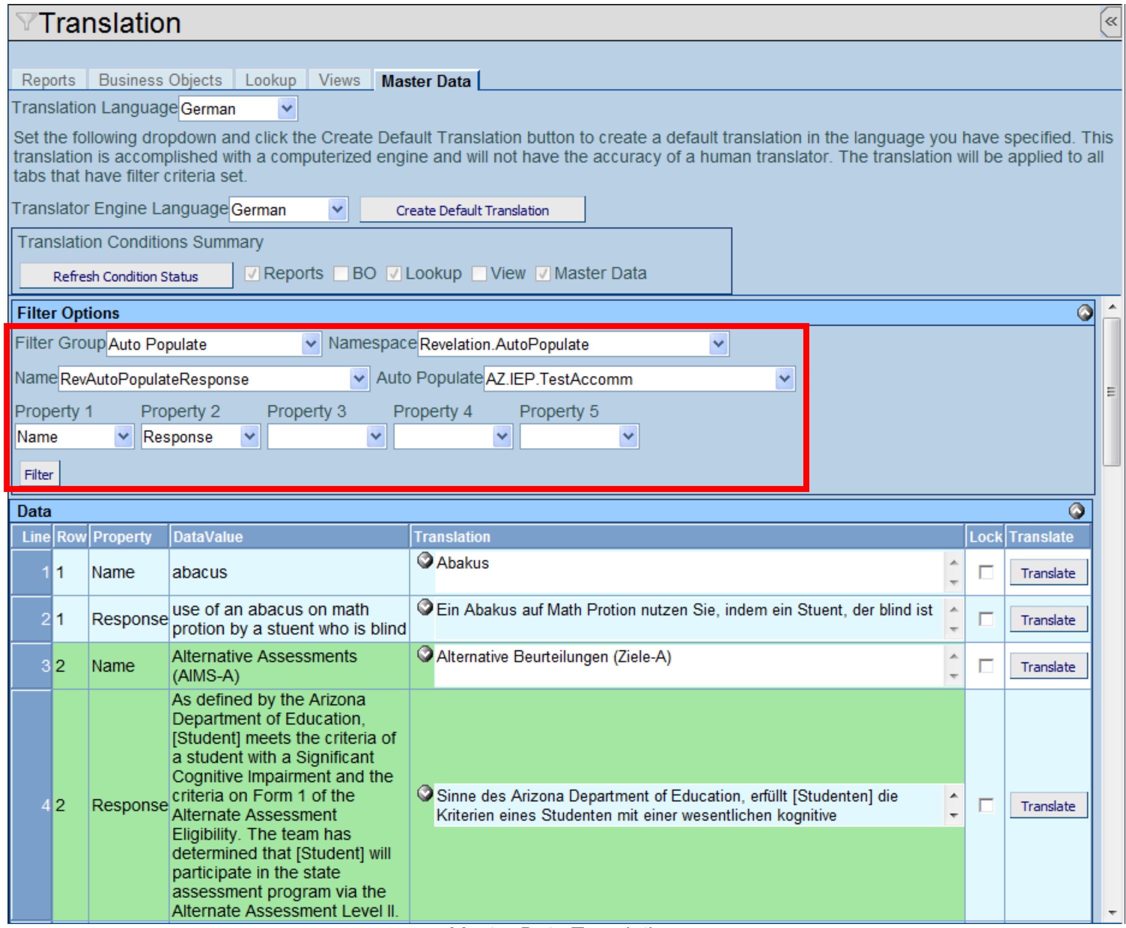
On the **Lookup** tab, enter **K12.LockerInfo** as the **Namespace** and **Locker_Condition** as the **Name**, and click the **Filter** button.



Lookup Translations

Example: Master Data

You can translate names and responses of accommodations for special students in Arizona. On the **Master Data** tab, enter filters as shown here.



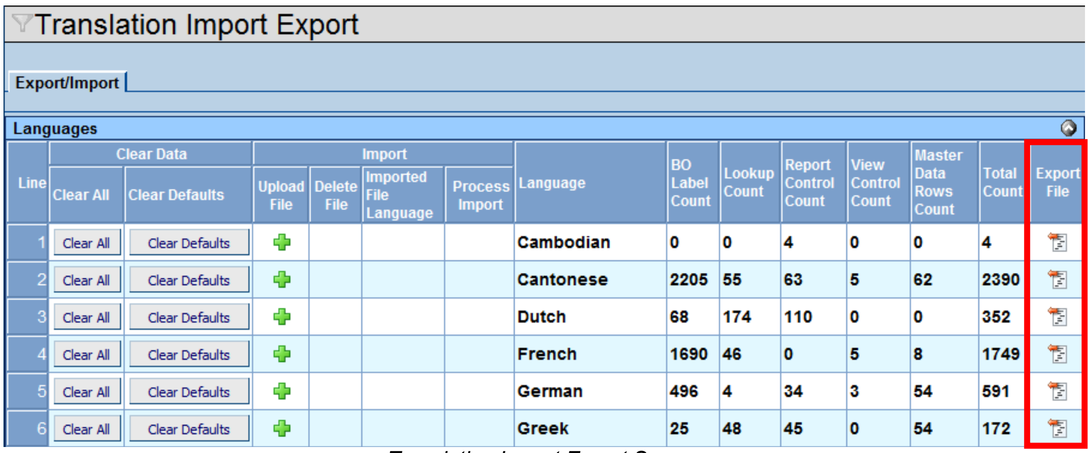
Master Data Translations

Exporting and Importing Translations

You can use the **Translation Import Export** screen to export current translations to share with another district, and to import translations that have been exported.

To export:

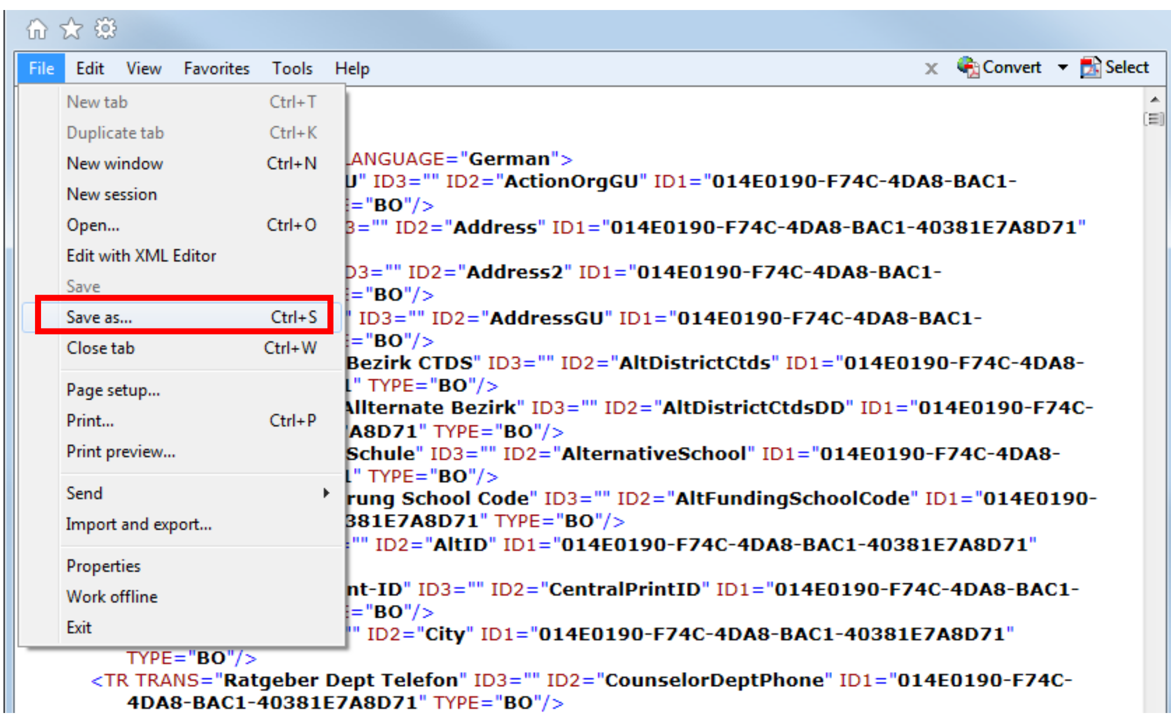
1. Go to **Synergy SIS > System > Setup > Translation Import Export**.
2. In the **Export File** column for the desired language, click the icon. The translations appear in an XML file in a new window.



Line	Clear Data: Clear All	Clear Data: Clear Defaults	Import: Upload File	Import: Delete File	Import: Imported File Language	Import: Process Import	Language	BO Label Count	Lookup Count	Report Control Count	View Control Count	Master Data Rows Count	Total Count	Export File
1	Clear All	Clear Defaults					Cambodian	0	0	4	0	0	4	
2	Clear All	Clear Defaults					Cantonese	2205	55	63	5	62	2390	
3	Clear All	Clear Defaults					Dutch	68	174	110	0	0	352	
4	Clear All	Clear Defaults					French	1690	46	0	5	8	1749	
5	Clear All	Clear Defaults					German	496	4	34	3	54	591	
6	Clear All	Clear Defaults					Greek	25	48	45	0	54	172	

Translation Import Export Screen

3. On the **File** menu, click **Save as**.

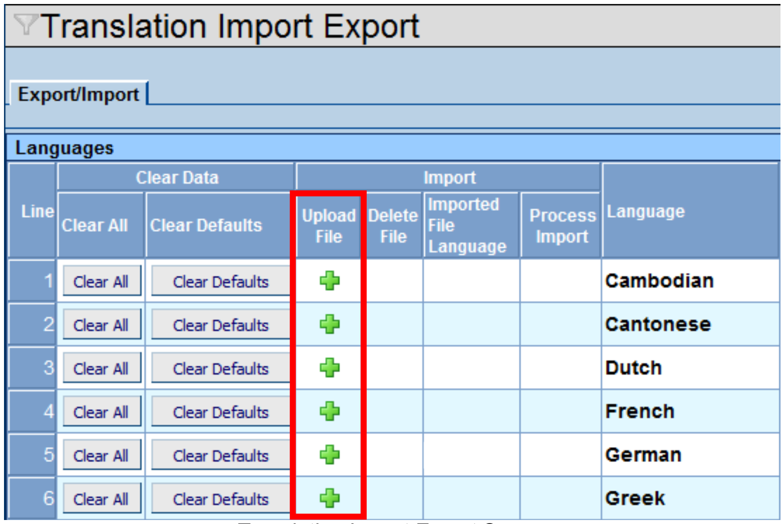


Saving a Translation XML File

4. Save the XML file with a recognizable name.

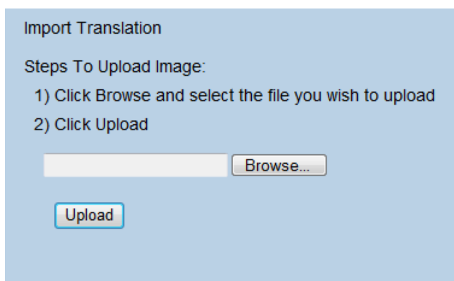
To import:

1. Go to **Synergy SIS > System > Setup > Translation Import Export**.
2. In the **Upload File** column for the desired language, click the icon.



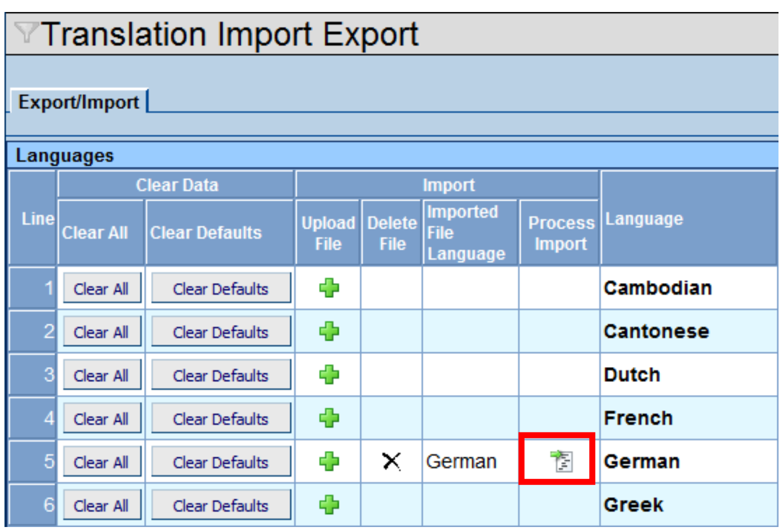
Translation Import Export Screen

3. Click the **Browse** button, select the XML language file, and click the **Upload** button.



Import Translation Screen

4. In the **Process Import** column, click the icon.

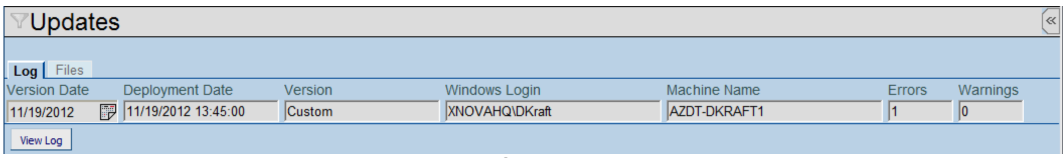


Translation Import Export Screen

UPDATES

Synergy SIS > System > Setup > Updates is a read-only screen where you can see the history of software updates applied to your system. Use the scroll buttons or Find mode to locate an update.

The **Log** tab shows the when the update was applied, the user who applied it, and whether any errors or warnings resulted. You can click the **View Log** button to see a detailed log; generally, this is of use to Edupoint support personnel only.



Updates Screen, Log Tab

The **File** tab lists all files that were part of the update.

Chapter Ten: RT PROCESS SERVER AND DB TOOLS

This chapter covers:

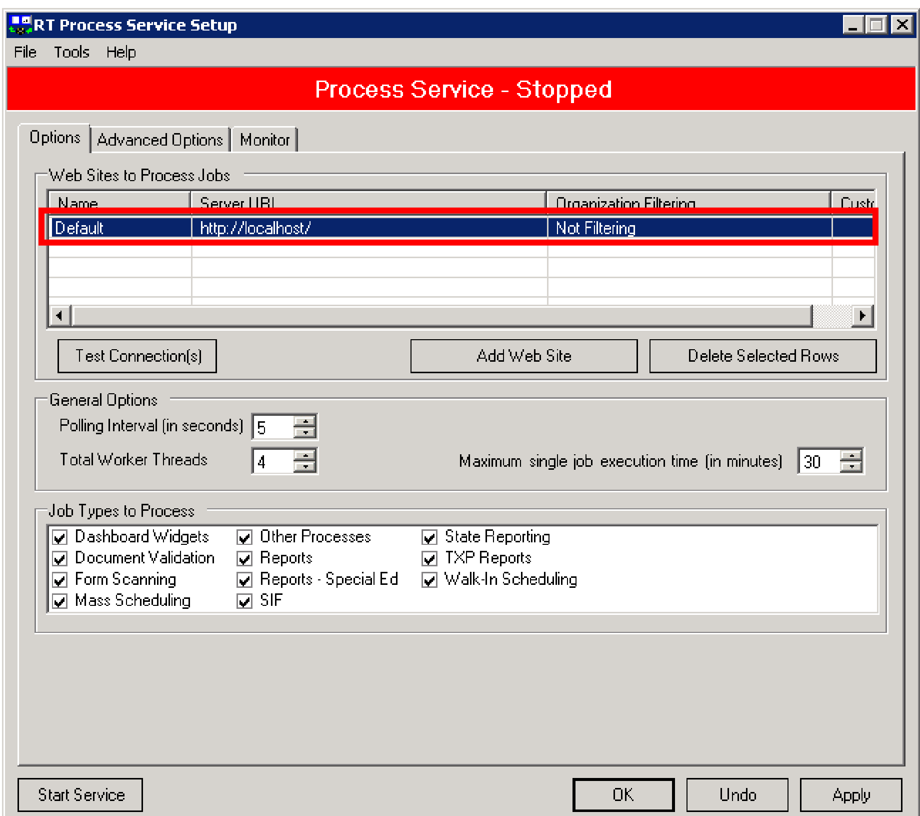
- ► How to manage the RT Process Server
- ► How to install and use DBTools
- ► Troubleshooting hints for common Synergy SIS issues
- ► Recommended backup strategies for Oracle databases

RT PROCESS SERVER

The RT Process Server software processes reports and other time-consuming jobs to free up the front-end web server. This improves performance for the end users, and allows jobs to be scheduled separately from a user-generated request. The RT Process server software is generally installed on one or more physical servers separate from the web and database servers.

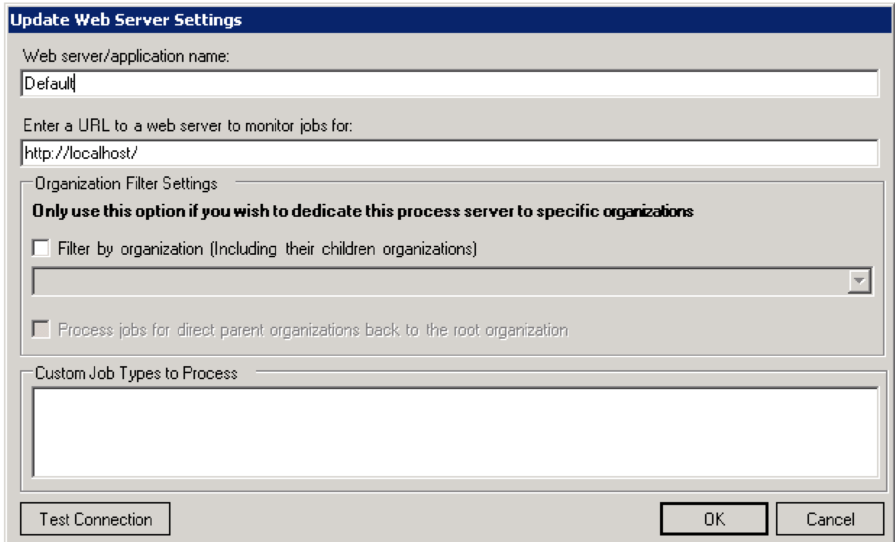
Each process server can be configured to process jobs from specific web servers or specific organizations. The process server can also be configured to process only certain types of jobs. For example, one process server could be dedicated to the website for the ParentVUE and StudentVUE software and a separate process server could run the jobs for the training web server. To configure the process server:

1. Start the RT Process Server software by clicking on the **RTProcessSetup** program icon in the **Edupoint** folder in the **All Programs** menu on the server.
2. To modify the default web server information, double-click the **Default** line under **Web Sites to Process Jobs**. If the settings are not correct for the default website, it may be necessary to first add a web site with the correct information and then delete the initial default site.



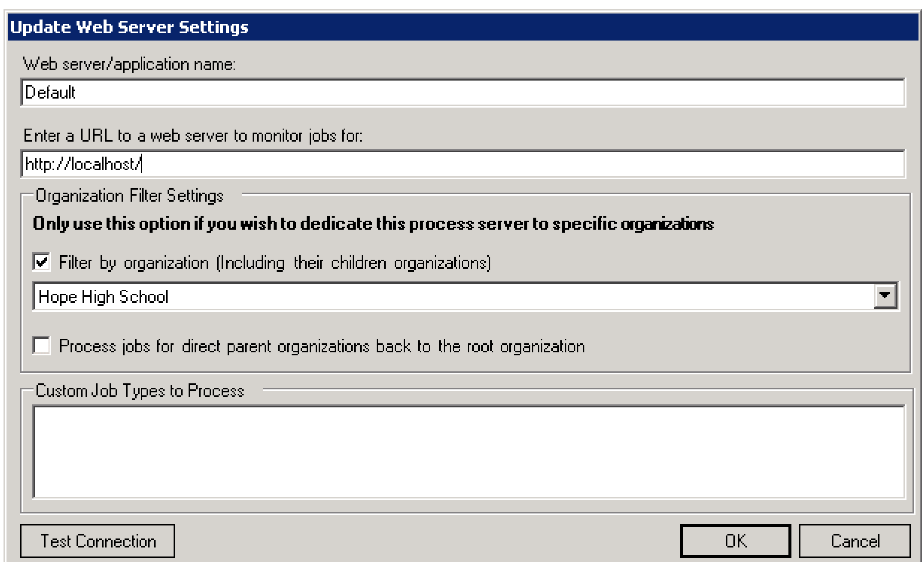
RT Process Service Setup

3. The **Web server/application name** is used to name the web server serviced by the process server. This can be any text.



Update Web Server Settings

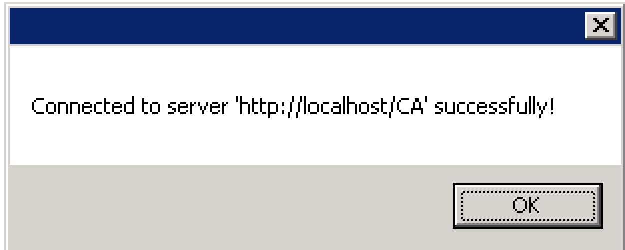
4. Enter the **URL** used to access the web server from the process server. If the web server is located on the same server as the process server, the URL will be http://localhost/.
5. To process jobs for specific organizations only, check the **Filter by organization** box, and select the organization in the list.



Update Web Server Setting, Filtering By Organization

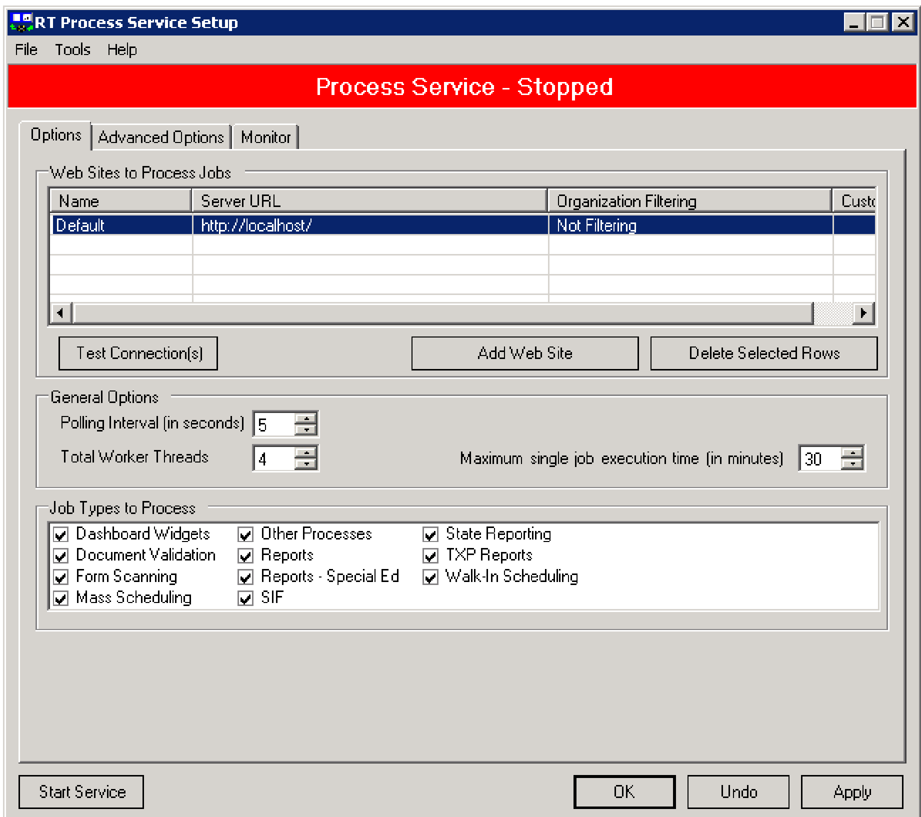
6. To process jobs for all organizations above the selected organization, check the **Process jobs for direct parent organizations back to the root organization** box.
7. Enter the names of any **Custom Job Types to Process**, separated by semicolons.
8. Once the information has been entered, click the **Test Connection** button to verify the URL.

9. In the message box, click **OK**.



Message Box

10. Click **OK** to save the settings for the web server.



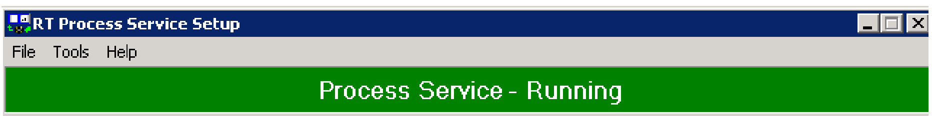
RT Process Service Setup

11. Process servers can be set up to service more than one web site definition. To add an additional web site, click the **Add Web Site** button.
12. To delete a web site, click the row to delete and click the **Delete Selected Rows** button.
13. To test all of the websites listed, click the **Test Connection(s)** button.
14. To specify how frequently the process server checks for jobs to process, adjust the **Polling Interval** number. This is the number of seconds between checks. Too small an interval can chew up processor cycles on the server, but too large an interval will force users to wait longer for their reports.
15. To specify how many jobs can be processed at the same time, adjust the number of **Total Worker Threads**. Be careful about setting too high a number here, which could greatly slow the server. Generally 4 threads is a good number.

16. Adjust the number of minutes a single job may take to process in the **Maximum single job execution time** box. Most jobs take only a few minutes, but some jobs such as large reports or the new year rollover may take more. To prevent these jobs from taking up all of the time on a particular process server, the number of minutes may be adjusted downward. When running these time-consuming jobs, adjust the number of minutes upward. Generally the new year rollover takes 300 minutes or more. If the job exceeds the number of minutes set, it is not processed and the job is stopped.
17. Select the types of jobs to be processed by this process server by checking the boxes in the **Job Types to Process** section.
18. Click the **Apply** button to save the settings.
19. To start the process server, click the **Start Service** button at the bottom of the window. During the start-up process, the RT Process Service Setup software shows the Process Service as **StartPending** in red at the top of the window.

Process Service Start Pending

20. Once the service has started successfully, the bar at the top of the window turns green and the Process Service is shown as **Running**.

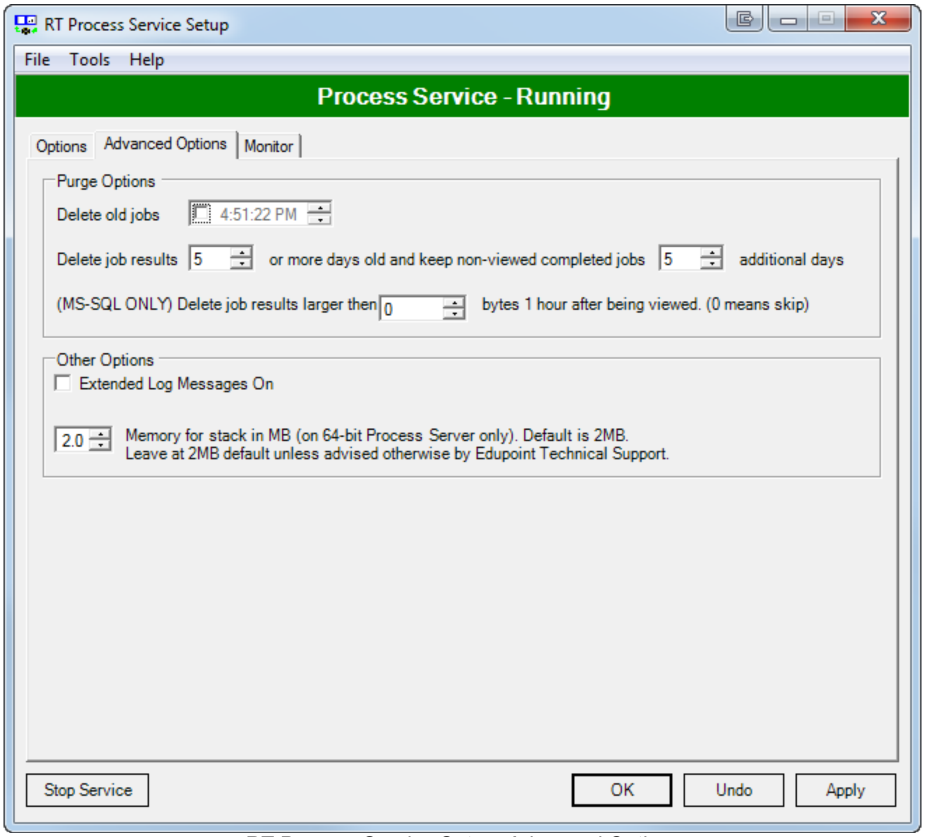


Process Service Running

21. Once the service is running, you can stop it by clicking the **Stop Service** button at the bottom of the window.

To change more options, click the **Advanced Options** tab. These options can clear old jobs from the process server to recover disk space, and provide additional diagnostic messages for jobs that encounter errors. To adjust these options:

1. Click the **Advanced Options** tab.

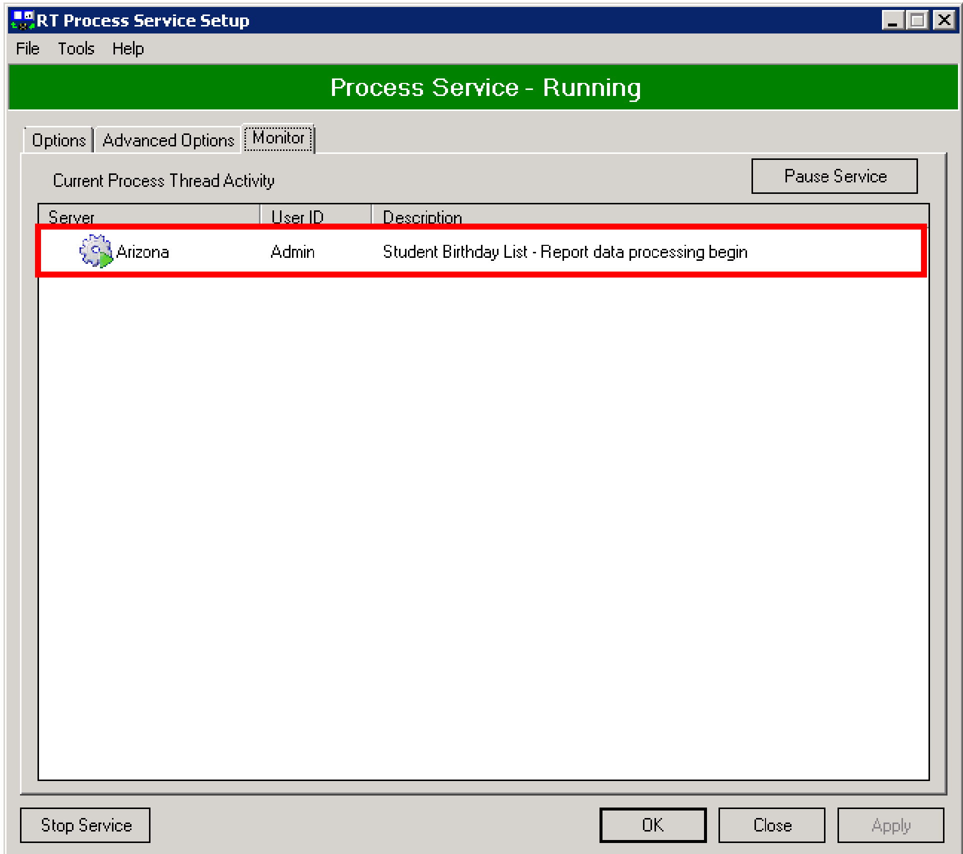


RT Process Service Setup, Advanced Options

2. To set the process server to automatically remove old jobs, check the box next to the time in the **Delete old jobs** field. Adjust the time at which the jobs will be deleted each day.
3. Jobs are deleted based on the age of the job. To specify when to delete jobs that have been opened, adjust the number of days listed the first box and all jobs older than that number of days will be deleted. To specify when jobs that have not been opened are deleted, enter the number of days in the second box.
4. For districts using Microsoft SQL Server as the database, jobs can also be deleted based on their size. Enter the size of the jobs to be deleted, and all jobs that have been opened over an hour earlier than the purge process runs and that are larger than the size specified will be deleted. Leaving the value at 0 will stop the purge process from evaluating jobs based on size.
5. To include additional details in the RT Process Server event log messages, check the box **Extended Log Messages On**. This is generally needed only if trying to diagnose an error or problem with the process server.
6. Leave **Memory for stack in MB** set at 2.0 unless instructed otherwise by Edupoint.

To monitor the jobs currently being processed on the server:

1. Click the **Monitor** tab, which lists each job in process, including the web server that originated ot, the user who submitted the job, and a description.

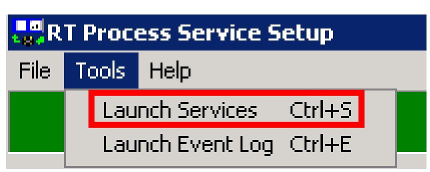


RT Process Service Setup, Monitor Tab

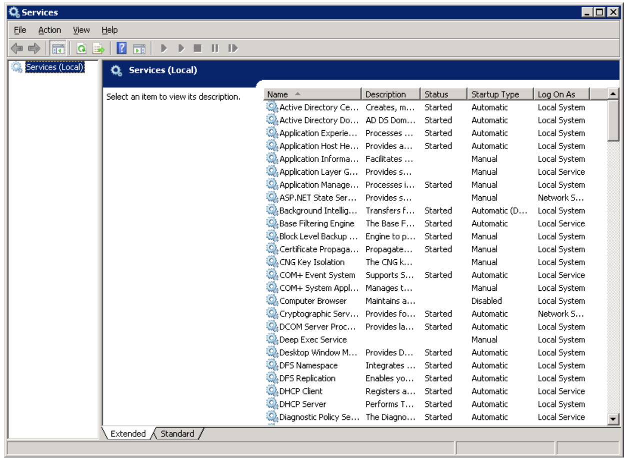
2. To pause the process server, click the **Pause Service** button at the top of the window. Jobs currently in process will continue to be processed once the service is restarted. If the service is stopped, jobs currently in process will be cancelled, but jobs that have not started yet will be processed.

To control the RT Process service from the Windows Services program instead of the RT Process Setup software:

1. On the **Tools** menu, click **Launch Services**.



Tools Menu

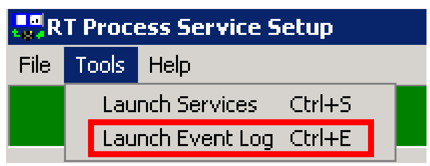


Services

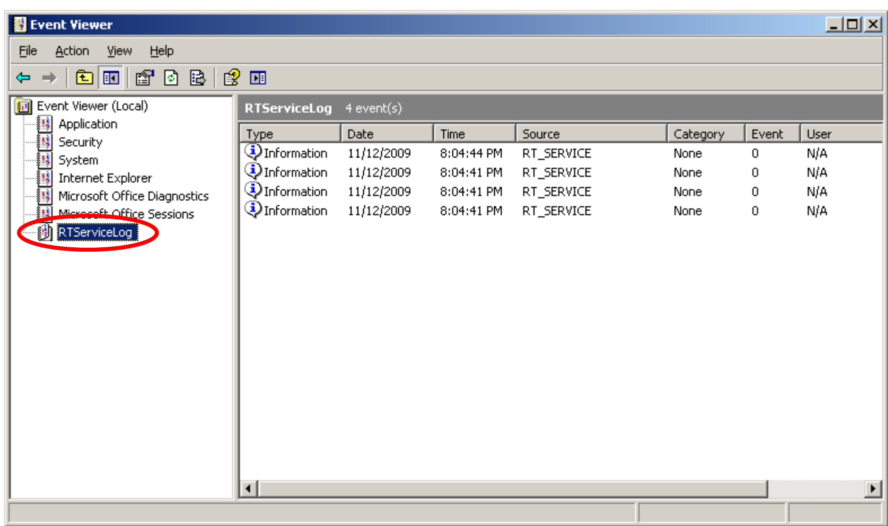
2. Start and stop the RT Process Service in the same manner as any service.

To view any messages regarding the RT Process Service in the Windows Event Log:

1. On the **Tools** menu, click **Launch Event Log**.



Tools Menu

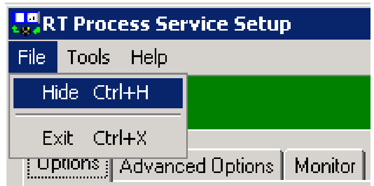


Event Viewer

2. Navigate to the **RTServiceLog** node. RT Process Service events appear here and not in the Applications node.

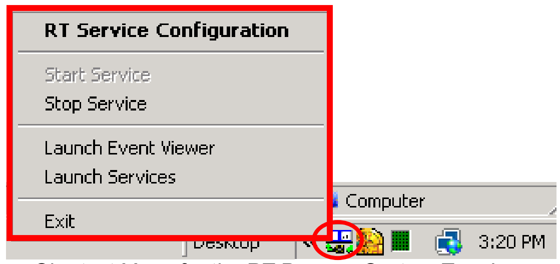
To minimize the RT Process Service Setup program to the system tray:

1. On the **File** menu, click **Hide**.



File Menu

2. Right-click the RT Process Service icon in the system tray to display a context menu.



Shortcut Menu for the RT Process System Tray Icon

To close the entire RT Process Service Setup program:

- Click **Exit** on the system tray context menu
  OR
- In the application, click Exit on the **File** menu

The service continues to run in the background, and jobs are still processed.

DB Tools

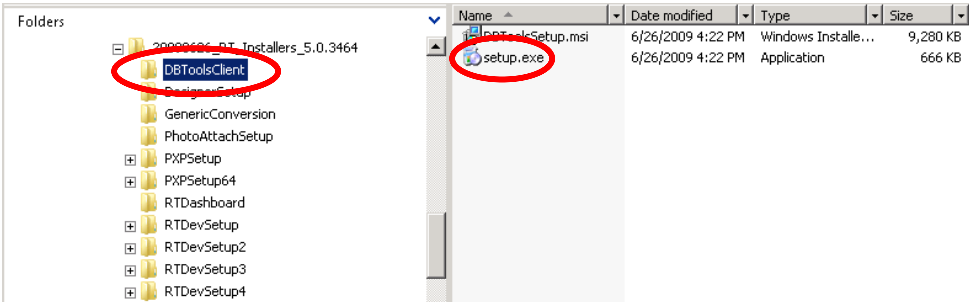
The DB Tools software gives access to run scripts and make other Synergy SIS database changes.

Caution: The computer on which DBTools is loaded must have access to the inetpub folder on a web server through a mapped network drive and also must be able to connect to the database server.

To install the DB Tools software:

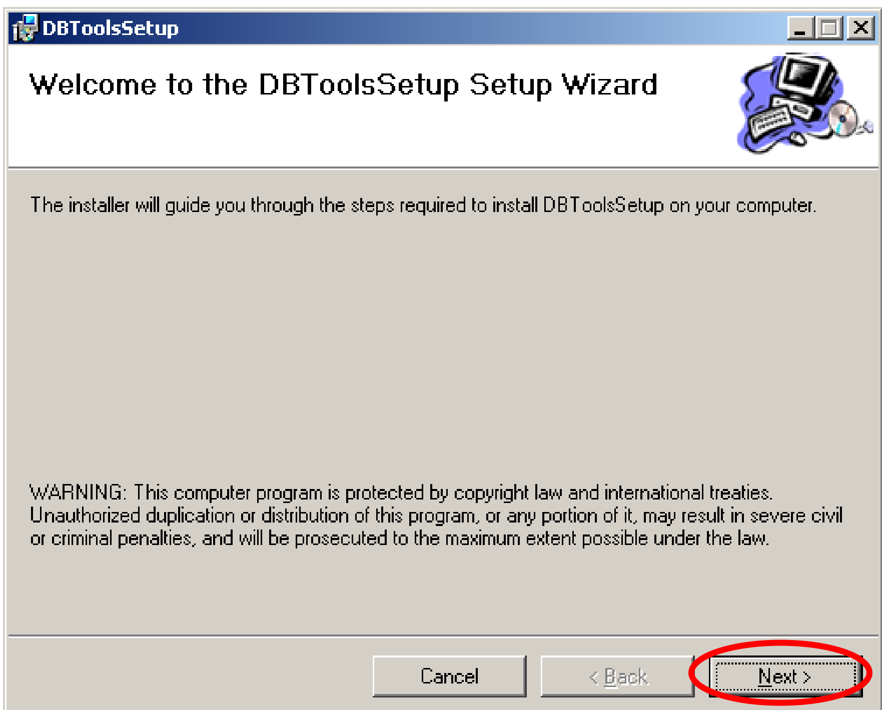
1. Download or copy the ZIP files containing the latest Synergy SIS release to the computer where the DB Tools program will be installed.
2. Extract the files from the ZIP files.

3. In the extracted release folder, find the folder titled **DBToolsClient**. In that folder, double-click the Setup.exe file.



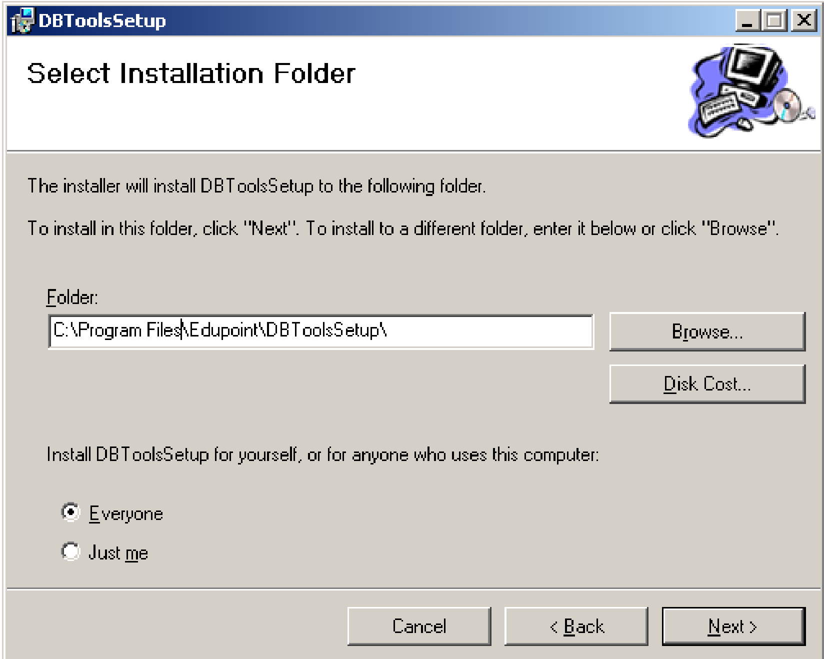
DBToolsClient Folder

4. In the **Welcome to the DBToolsSetup Setup Wizard** dialog box, click the **Next** button.



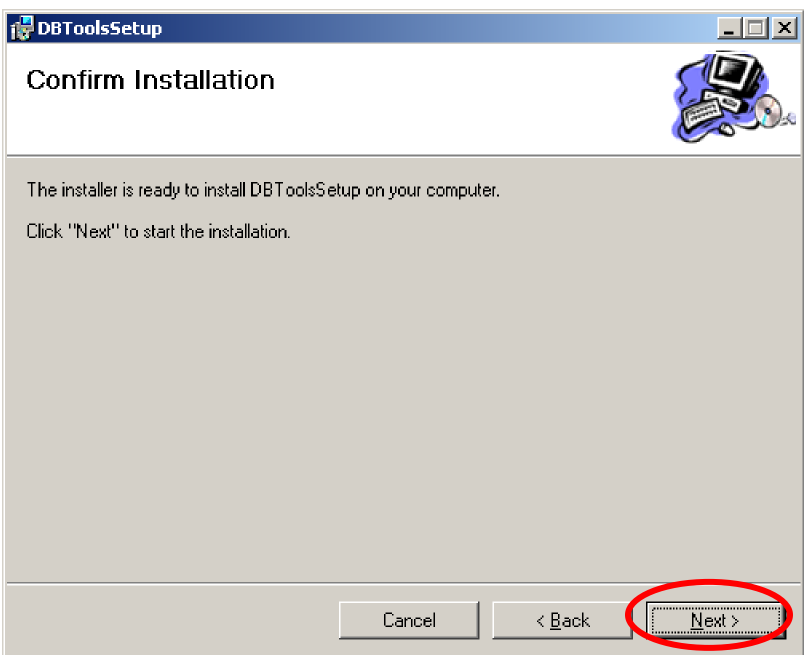
Welcome to the DBToolsSetup Setup Wizard dialog box

5. To change the location of the installation, type the new location in the **Folder** box or click the **Browse…** button to locate and select it.



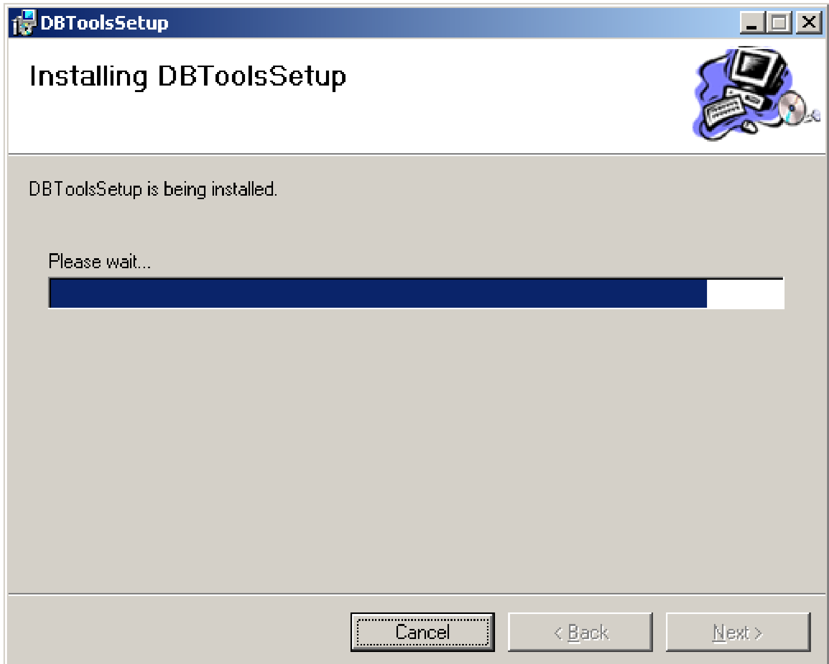
Select Installation Folder dialog box

6. To install the software so that all accounts can use it, click the **Everyone** option. To keep the software for use by the current account only, click the **Just Me** radio option.
7. Click the **Next** button.
8. In the **Confirm Installation** dialog box, click the **Next** button.



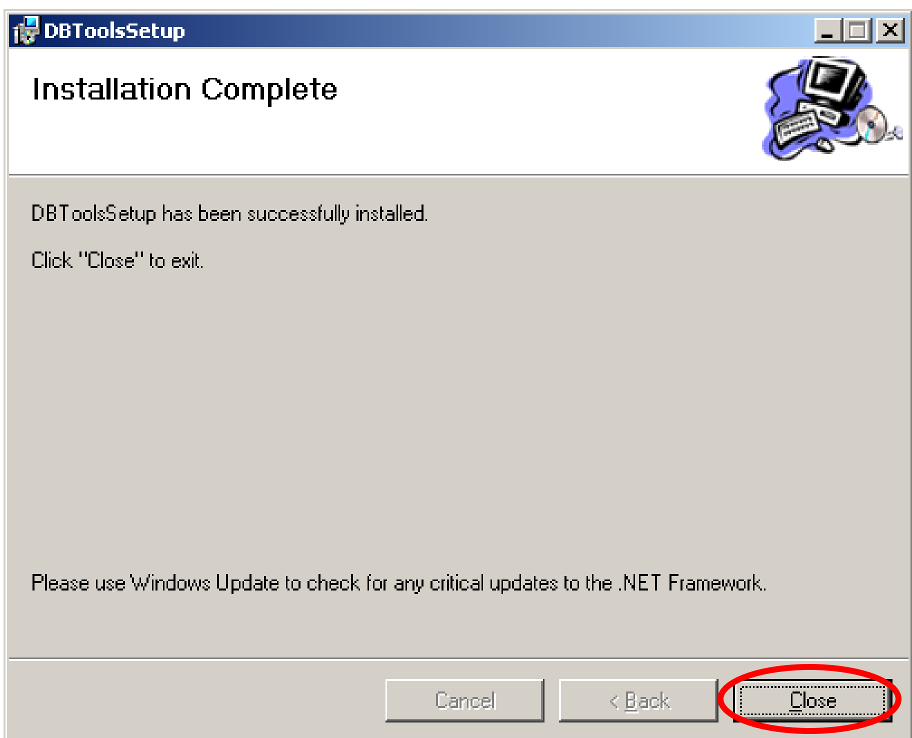
Confirm Installation dialog box

The Installing DBToolsSetup dialog box shows the progress of the installation.



Installing DBToolsSetup dialog box

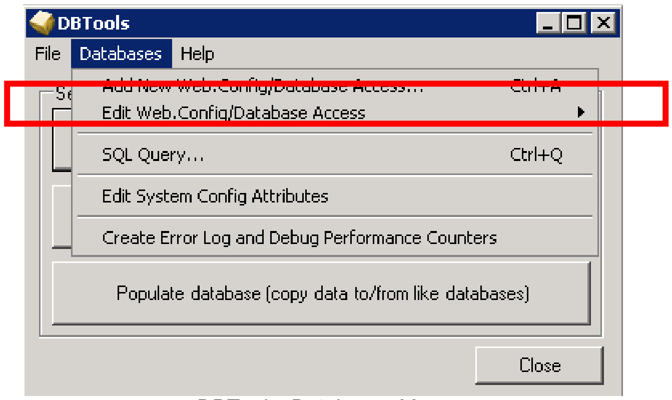
9. In the **Installation Complete** dialog box, click the **Close** button.



Installation Complete dialog box

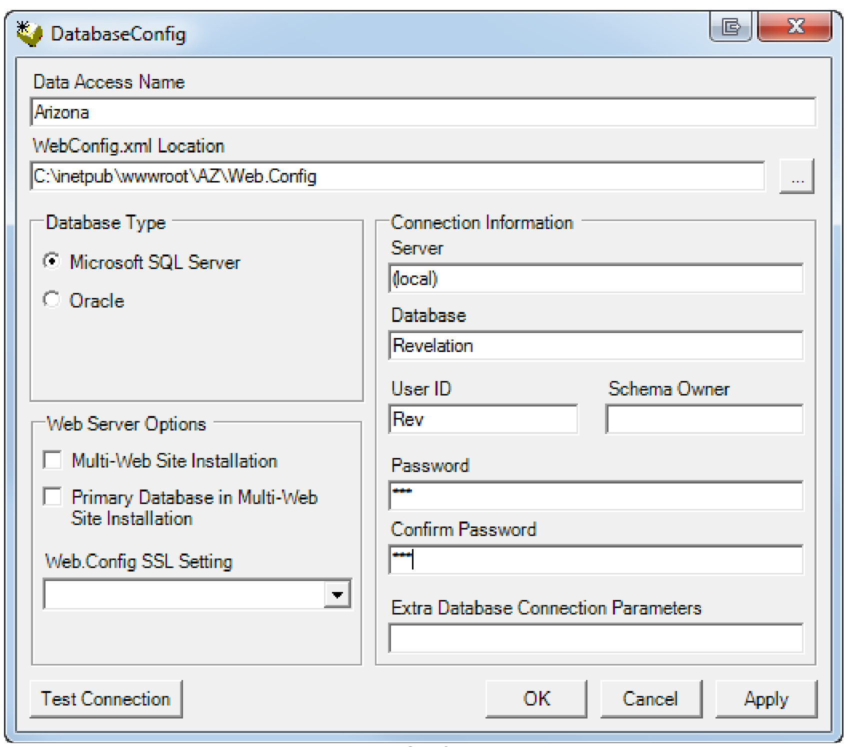
The next major step is to set up the connection to the database server.

1. Start the **DBTools** software by clicking on the icon found on the **Start** menu under **All Programs** in the **Edupoint** folder.
2. On the **Databases** menu, click **Add New Web.Config/Database Access…**



DBTools, Databases Menu

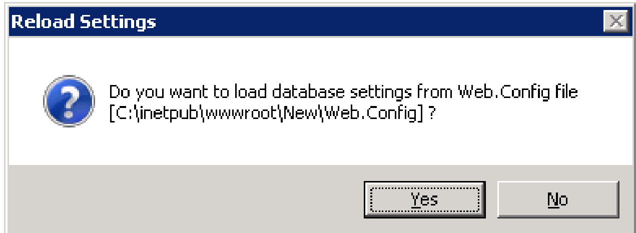
3. Enter a name for this connection (generally the name of the database) in the **Data Access Name** box.



Database Config Window

4. Select the **WebConfig.xml Location** by clicking the ... button. This location is generally the C:\inetpub\wwwroot folder on a web server. The file that is loaded is named web.config. Click **Open** to select the web.config file.

5. The **Reload Settings** box opens to confirm. Click the **Yes** button.

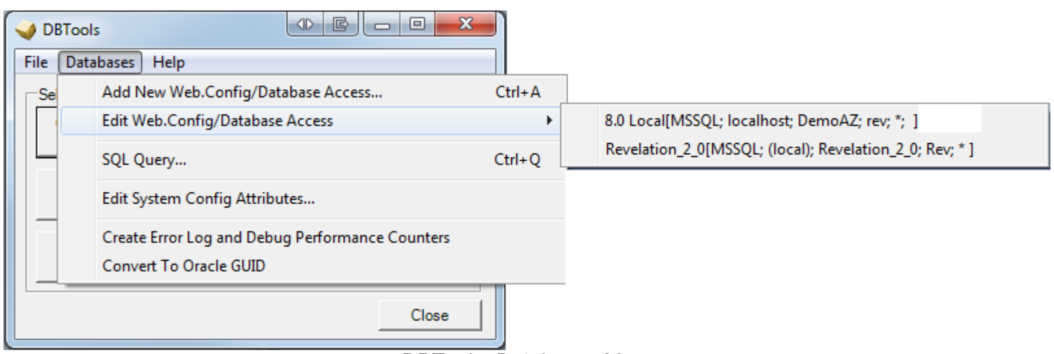


Reload Settings Box

6. The settings used by the web server to connect to the database are loaded into the **DatabaseConfig** window.
7. Make sure the correct **Database Type** is selected.
8. If the district has multiple Synergy SIS web servers, check the **Multi-Web Site Installation** box. If the database managed by this connection is the primary production database, check the **Primary Database in Multi-Web Site Installation** box.
9. If connecting to a SQL 2005 or 2008 database, enter **rev** as the **Schema Owner**.
10. In the **Web.Config SSL Setting** list, click **SSL disabled** if the Synergy SIS website uses HTTP, or **SSL Required** if it uses HTTPS. If both HTTP and HTTPS work, or you use the ClassBoard application. click **SSL Enabled**.
11. To check the settings, click the **Test Connection** button.
12. Click the **OK** button.

To edit an existing database connection:

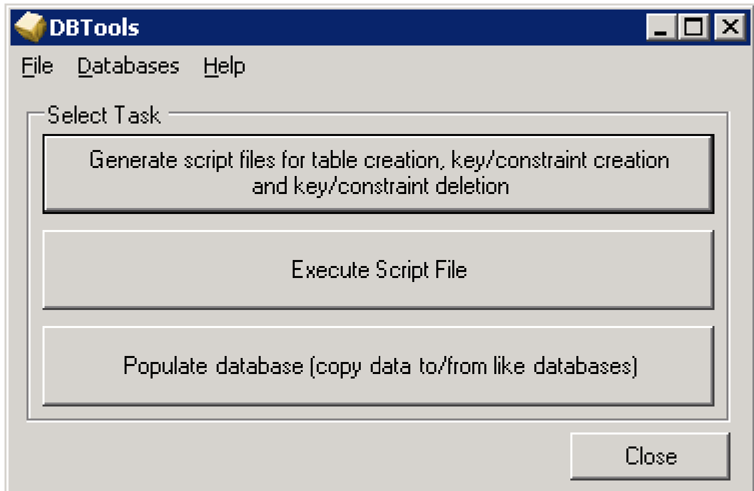
1. On the **Databases** menu, click **Edit Web.Config/Database Access** and click the database configuration to modify.



DBTools, Databases Menu

2. The **DatabaseConfig** window opens. Edit the connection as outlined in the previous section, and then click the **OK** button to save the changes.

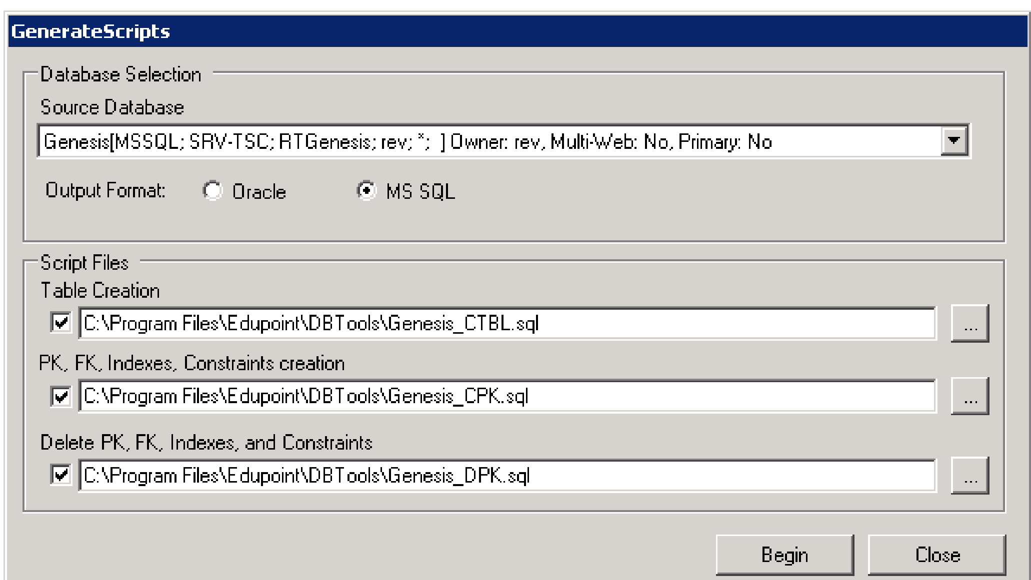
Once the DBTools software can connect to the database, several tasks can be run against the database. On the main DBTools window, three task buttons are available: **Generate script files**, **Execute Script File**, and **Populate database**.



Main DBTools Window

The **Generate script files** task creates SQL scripts that can be used to create a blank Synergy SIS database based on an existing Synergy SIS database. This can be used to create a test or training database with no data. To generate these scripts:

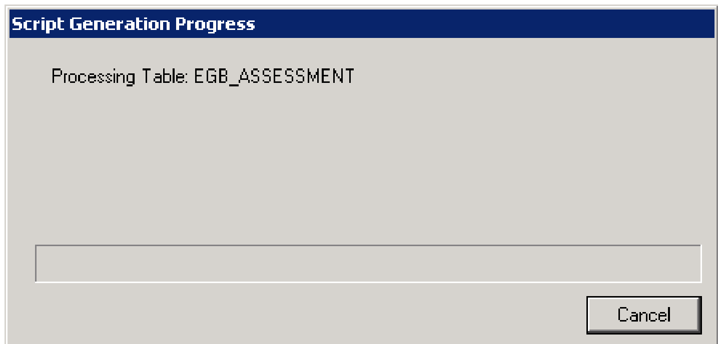
1. Click the **Generate script files** button.
2. In the **Source Database** list, select the database connection to use.



Generate Scripts Window

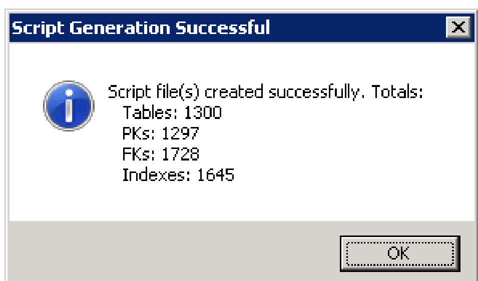
3. Select an **Output Format** option to create the scripts in **Oracle** or **MS SQL** format.
4. To create a script that will create the Synergy SIS tables as they currently exist in the selected databases, check the box under **Table Creation** and edit the location where the script will be created.

5. To create a script that will create the primary keys, foreign keys, indexes, and constraints as they exist in the selected database, check the box under **PK, FK, Indexes, Constraints creation** and edit the location where the script will be created.
6. To create a script that will delete the primary keys, foreign keys, indexes, and constraints, check the box under **Delete PK, FK, Indexes, and Constraints** and edit the location where the script will be created.
7. Click the **Begin** button to create all selected scripts. The **Script Generation Process** window opens to show the progress of the script generation.



Script Generation Progress

8. Click **OK** to close the **Script Generation Successful** box.

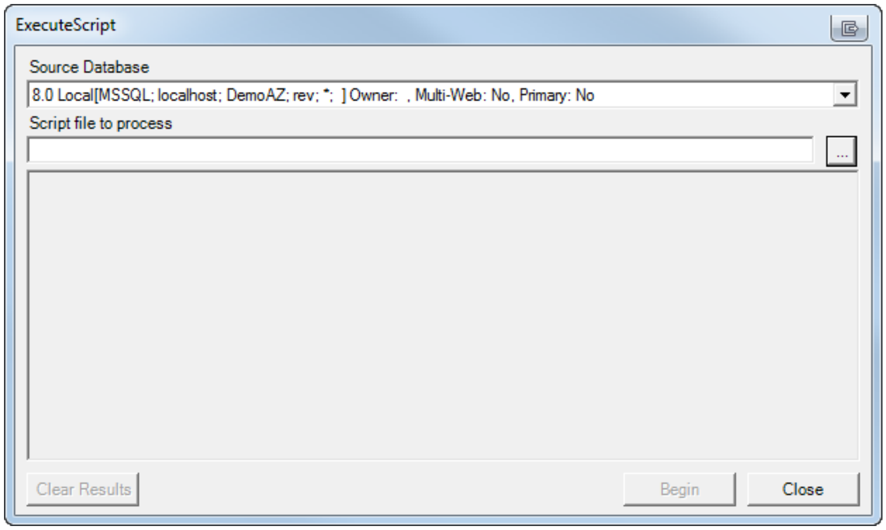


Script Generation Successful Message Box

The scripts can then be copied or run from the location specified.

The **Execute Script File** task can run any SQL script against the selected database. To run a script:

1. Click the **Execute Script File** button.
2. Select the database to be changed from the **Source Database** list.

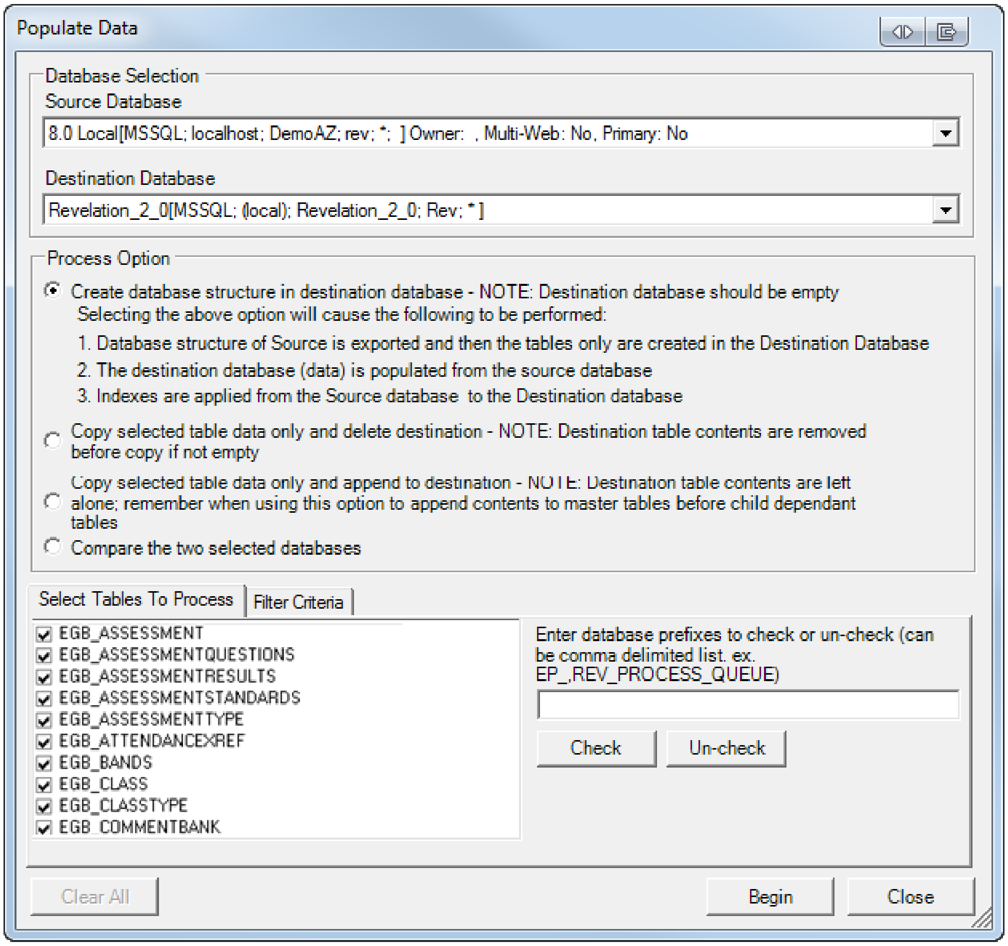


Execute Script

3. Select the **Script file to process:** Click the button, and find and select the SQL script.
4. Click the **Begin** button to run the script.
5. Click the **OK** button in the **Script Generation Successful** box.
6. If errors are displayed, click the **Clear Results** button so you can run another script.
7. Click the **Close** button.

The **Populate database** task can create the Synergy SIS database structure as well as copy the existing database data to another database. This can be very helpful in creating test or training databases. To copy the database data:

1. Click the **Populate Database** button.
2. Select the database from which to copy the data using the **Source Database** list. Then select the database to which the data will be copied from the **Destination Database** list.



Populate Database Window

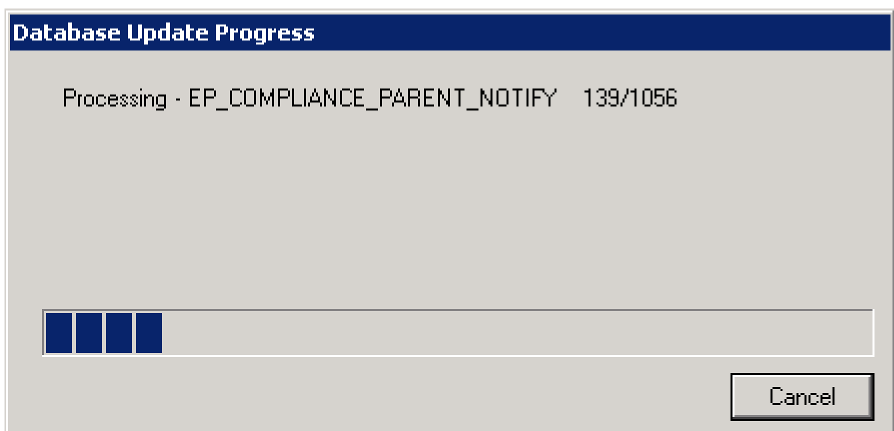
3. Select how the data from the source database will be copied to the destination database in the **Process Option** section. Option 1 copies the tables, indexes and overall database structure as well as the data. The destination database must be empty for this option. Option 2 deletes the existing data in the destination database before copying the data. Option 3 just copies the data, appending it to the current contents of the destination database. Option 4 compares the databases but does not copy data.
4. Not all of the tables in the source database must be copied. To select which tables should be copied, check boxes on the **Select Tables to Process** tab. To remove all the selections and start over, click the **Clear All** button.
5. Tables may also be checked and unchecked based on their prefix. To check or uncheck by prefix, enter the prefixes to be modified in the **Enter database prefixes**

box and click the **Check** or **Un-Check** button. Multiple prefixes can be entered, separated by commas. Common prefixes are EGB for the Grade Book tables, EP for the Synergy SE tables, EPC for the Synergy SIS tables, and REV for the system tables.

6. Data can also be filtered by the organization, year, or year type by using the **Filter Criteria** tab. Only records that match these criteria will be copied.

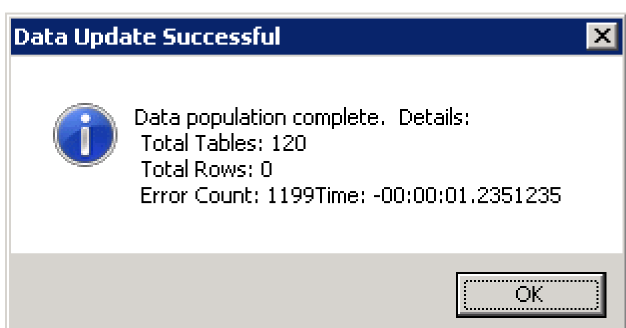
Filter Criteria Tab

7. Click the **Begin** button to copy the data. The Database Update Progress window opens to display the progress of the data copying process.



Database Update Progress

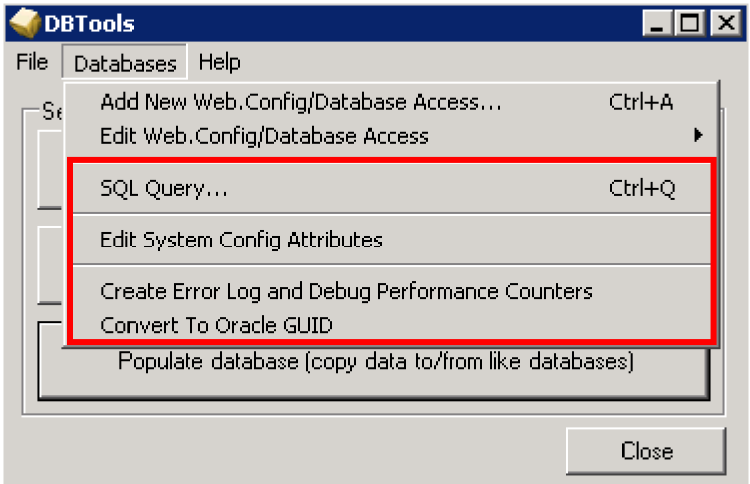
8. Click the **OK** button in the **Data Update Successful** box to return to the **Populate Data** window.



Data Update Message Box

9. Click the **Close** button.

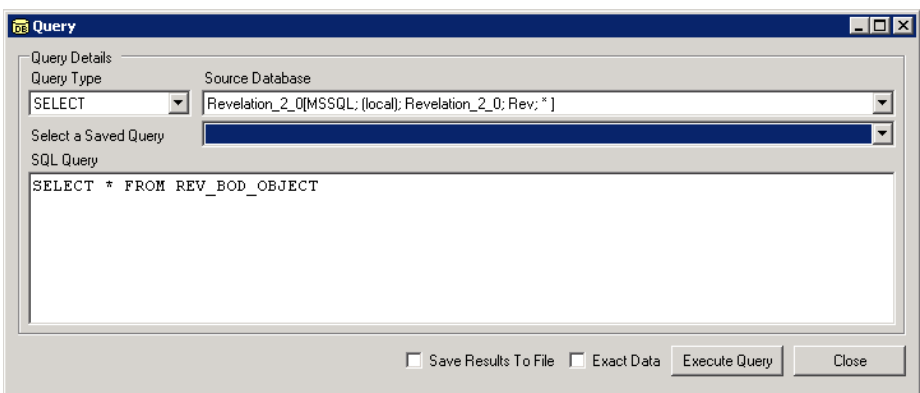
In addition to the three tasks available from the main **DBTools** window, four additional options are available on the **Databases** menu: **SQL Query**, **Edit System Config Attributes**, **Create Error Log and Debug Performance Counters**, and **Convert to Oracle GUID**.



Databases Menu

SQL Query allows SQL queries to be saved for periodic use. Queries can be constructed by typing them in or by copying and pasting them from another source. While the Execute Script option only allows a query to run that has been saved to a file, this option allows queries to be created on the file and saved as well. To run a SQL Query:

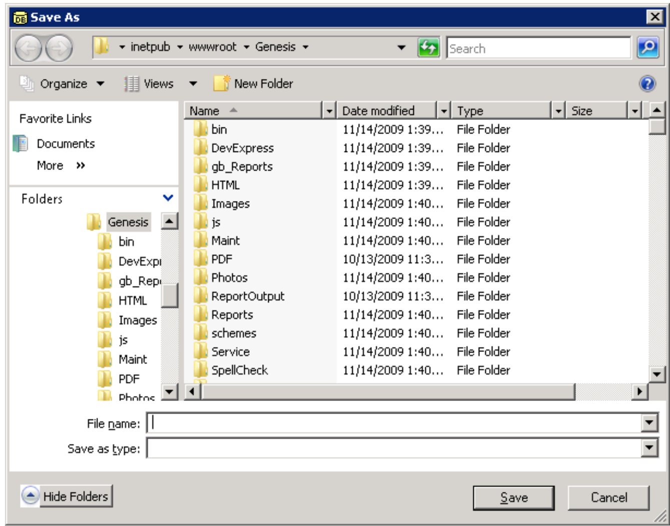
1. On the **Databases** menu, click **SQL Query**. The **Query** window opens.



Query Window

2. Select the database connection to use from the **Source Database** list.
3. Choose a saved query from the **Select a Saved Query** list, or begin a new query.
4. Choose the type of query to run from the **Query Type** list. A **SELECT** query displays the records selected by the query, similar to a report. A **NON-SELECT** query modifies or deletes data. **NON-SELECT queries should be attempted only under the guidance of the Edupoint support team, as they can disable the entire Synergy SIS system.**
5. Enter the query in the **SQL Query** box. Queries can also be copied and pasted into this box.

6. To save the selected records in a tab-delimited text file, check the box labeled **Save Results to File**. When the query is run, a box opens, prompting for the name and location of the file to be saved.

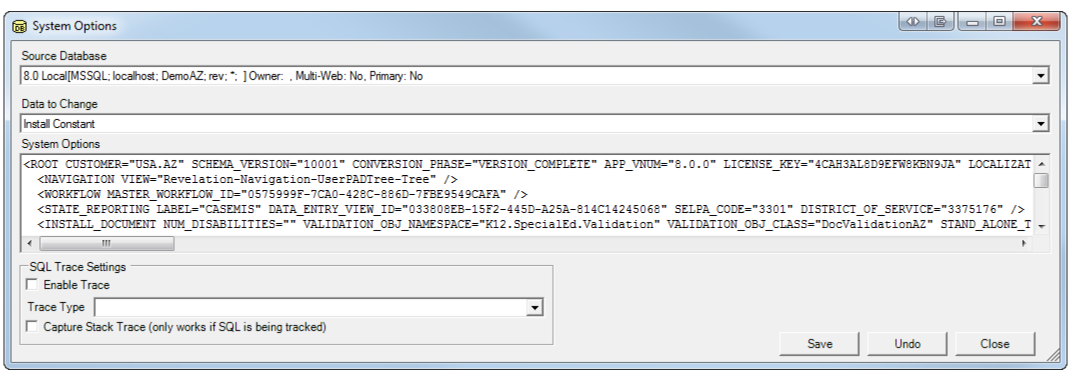


Saving Results To File,

7. Check the **Exact Data** box to include the data with the query when saved.
8. To run the query, click the **Execute Query** button.

Edit System Config Attributes modifies various Synergy SIS constants for the entire system. These values should not be modified except when approved by Edupoint support. To modify these system options:

1. On the **Databases** menu, click **Edit System Config Attributes**.



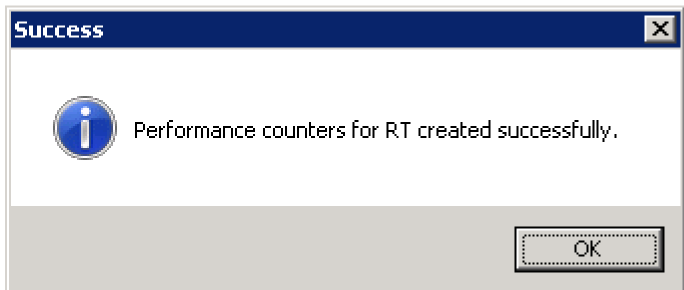
System Options Window

2. Select the database to be changed from the **Source Database** list.
3. Select the type of information to modify from the **Data to Change** list. **Install Constant** is used during the system installation or upgrade process, and **Application Constant** is used when running the web server application.
4. Edit the data in the **System Options** box.
5. **Under SQL Trace Settings**, configure trace settings to your needs.
6. Click the **Save** button to save the changes.

7. Click the **Close** button.

Create Error Log and Debug Performance Counters creates Windows performance counters on the server to monitor server performance. To create the log and counters:

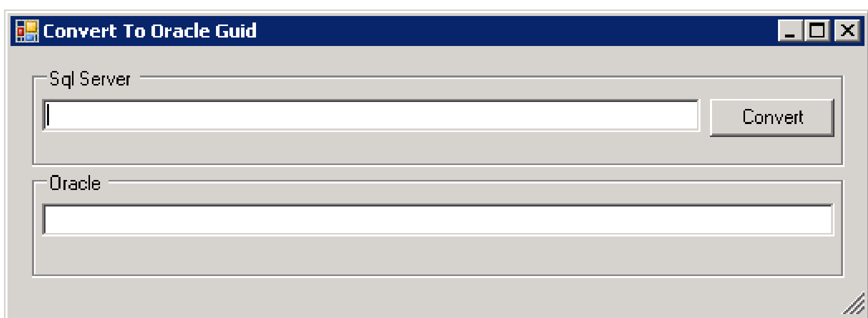
1. On the **Databases** menu, click **Create Error Log and Debug Performance Counters.**
2. Click **OK** to close the **Success** message box.



Success message box

Convert to Oracle GUID helps with the transition from a SQL Server-based setup to an Oracle-based setup. To convert all GU in SQL (unique record ID) to Oracle GUID:

1. On the **Databases** menu, click **Convert To Oracle GUID**.



Convert to Oracle GUID

2. Enter the names of the **Sql Server** and **Oracle** server.
3. Click the **Convert** button.

TROUBLESHOOTING HINTS

While the Edupoint support team is always happy to assist districts, two common problems can be easily resolved by following the steps below.

If the RT Process Server will not start with any configuration but it can connect to the web server, check the size set for the RT Service log. To check the log size:

1. On the server, start the **Event Viewer**.
2. Right-click the **RT Service Log** in the left column, and select **Properties**.
3. In the **Maximum log size**: field, enter **2048** or greater.

4. Click the **Overwrite events as needed** option.
5. Click the **OK** button.

After restoring a database from a backup file such as the Demo Database, the "rev" user may not work when trying to connect to the database. To resolve this problem, run the RevUser SQL query available for download on the Edupoint FTP site. To run the query:

1. Download the **Rev_User.sql** (SQL 2000) or **RestoreRevUser2005.sql** (SQL 2005/2008) file from the _Support folder on the FTP site.
2. Start **SQL Server Management Studio** for SQL 2005/2008 or run **SQL Query Analyzer** in SQL 2000.
3. On the **File** menu, click **Open**.
4. Choose **File** and browse to select the **RevUser.sql** (SQL 2000) or **RestoreRevUser2005.sql** (SQL 2005/2008) file.
5. Change the **database** listed in the menu to the database that needs to be fixed.
6. Click the **Execute** or **Run** icon (the green arrow) to run the query.

Recommended Backup Strategies for Oracle

Before creating an Oracle database, decide how to protect the database against potential failures. Answer the following questions before developing a backup strategy:

Is it acceptable to lose any data if a disk failure damages some of the files that constitute a database?
If it is not acceptable to lose any data, the database must be operated in ARCHIVELOG mode, ideally with a multiplexed online redo log. If it is acceptable to lose a limited amount of data if there is disk failure, the database can be operated in NOARCHIVELOG mode and avoid the extra work required to archive filled online redo log files.

Will there ever be a need to recover to arbitrary past points in time?
If there may be a need to recover to a past point in time to correct an erroneous operation or programmatic change to the database, be sure to run in ARCHIVELOG mode and perform control file backups whenever making structural changes. Recovery to a past point in time is facilitated by having a backup control file that reflects the database structure at the desired point-in-time.

Does the database need to be available at all times, 24 hours a day, seven days a week?
If so, do not operate the database in NOARCHIVELOG mode because the required whole database backups, taken when the database is shutdown, cannot be made frequently, if at all. Therefore, high-availability databases always operate in ARCHIVELOG mode to take advantage of open data file backups.

Methods for Oracle Database Backups

- **Export/Import** – Exports are "logical" database backups in that they extract logical definitions and data from the database to a file.

- **Cold or Offline Backups** – Shut the database down and back up ALL data, log, and control files.
- **Hot or Online Backups** – If the database is available and running in ARCHIVELOG mode, set the tablespaces into backup mode and back up their files. Also remember to back up the control files and archived redo log files.
- **RMAN Backups** – While the database is offline or online, use the “RMAN” utility to back up the database.

It is advisable to use more than one of these methods to back up an Oracle database. For example, if running online database backups, perform database exports as well. Ensure that ALL backup and recovery scenarios are tested carefully. Regardless of the strategy used, also remember to back up all required software libraries, parameter files, password files, etc. If the database is in ARCHIVELOG mode, also back up archived log files.

Chapter Eleven: REPORTS

This chapter covers:

- ► Available staff reports
- ► Available user reports

Four reports show staff and user data.

- **Synergy SIS > Staff > Reports > List > TCH401 – Staff Directory**
- **Synergy SIS > System > User > Reports > PRF601 – User Performance Statistics**
- **Synergy SIS > System > User > Reports > REV401 – User Group User List**
- **Synergy SIS > System > User > Reports > REV402 – User List**

Reference: For information about customizing all Synergy SIS reports, including options on all report interface tabs other than **Options**, see the *Synergy SIS – Query & Reporting Guide*.

TCH401 – STAFF DIRECTORY

The TCH401 - Staff Directory report provides an alphabetical listing of the staff by last name that includes email addresses, home addresses and phone numbers.

Hope High School
Staff Directory

Year: 2009-2010
Report: TCH401

Staff Name	Gen	E-Mail	Phone Type	Phone Number	Extn	Home Address	City	St	Zipcode
Maintenance									
McGrew, Tom	M	tmcgrew@edupoint.com	Work	480-455-0900	222	1550 E McKellips	Phoenix	AZ	85694
User, Test	M	test@edupoint.com							
User, TXP Admin	F	txp@edupoint.com							
User, TXP Report	F	txp@edupoint.com							
Weathers, Julia	F	Julia.Weathers@edupoint.com	Work	480-833-2900	507	1550 E McKellips Rd	Phoenix	AZ	85694
Weathers, Renee	F	Renee.Weathers@edupoint.com							
Teacher									
Aderson, Gordon	M	GAderson@ess.k12.org	Cell	623-555-4758					
Adm Office, Adm Office	M	staff@edu.com							
Andrews, Mark	M	MAndrews@ess.k12.org							
Arthur A., Andrea	F	AArthur A.@ess.k12.org							
Attend Office, Attend Off	M	AAttend Office@ess.k12.org							
Atwood S., Sharon	F	SAtwood S.@ess.k12.org							
Audio Visual, Audio Visual	M	AAudio Visual@ess.k12.org							
Banaszewski, Nancy	F	NBanaszewski@ess.k12.org							
Bayer M., Michelle	F	MBayer M.@ess.k12.org							
Becker A., Allison	F	ABecker A.@ess.k12.org							
Becker C., Chris	M	CBecker C.@ess.k12.org							
Behm A., Angela	F	ABehm A.@ess.k12.org							
Bellus G., Genice	M	GBellus G.@ess.k12.org							
Blackburn M., Matt	M	MBlackburn M.@ess.k12.org							
Blahak P., Pete	M	PBlahak P.@ess.k12.org							
Blasdell W., Wendy	F	WBlasdell W.@ess.k12.org							
Bonjour R., Richard	M	RBonjour R.@ess.k12.org							
Bookstore, Bookstore	M	BBookstore@ess.k12.org							
Bordwell R., Robert	M	RBordwell R.@ess.k12.							

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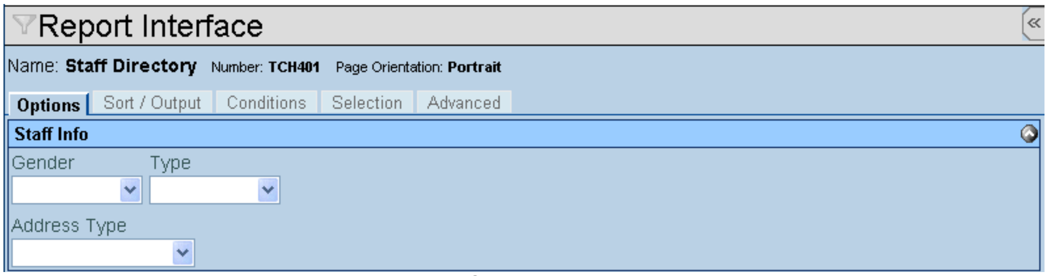
TCH401 – Staff Directory Report

The report can be customized using the following options:



Options Tab

- In the **Gender** list, click **Female** or **Male** to limit the report to those employees, or leave the box blank to include both female and male employees.
- In the **Type** list, select a single type of employee, if desired.
- In the **Address Type** list, select a type of address, or leave the box blank to print both types.

PRF601 – User Performance Statistics

The PRF601 – User Performance Statistics report is a summary report of the number of times data was accessed and for how long. It provides a count, a minimum and maximum number of seconds the system was accessed and an average of the access time.

Hope High School
User Performance Statistics

Year: 2009-2010
Report: PRF601

Process: Scroll forward

		........Number of Seconds........		
Process Date	Count	Average	Minimum	Maximum
04/26/2006	5	0.422	0.250	0.609
04/27/2006	21	0.391	0.094	2.344
05/02/2006	8	0.725	0.203	2.078
05/03/2006	86	0.756	0.047	6.516
05/04/2006	20	0.927	0.016	6.859
05/05/2006	5	0.147	0.094	0.188
05/16/2006	1	2.891	2.891	2.891
05/31/2006	4	1.152	0.234	3.578
06/30/2006	4	2.418	0.359	7.313
07/11/2006	1	0.938	0.938	0.938

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User Performance Statistics Report

There is no **Options** tab with customizations for this report.

REV401 – User Group User List

The REV401 – User Group User List report provides an alphabetical listing of the roles, such as Admin or Clerk, and the staff members included in each role. It also includes user name, login name and email address, and indicates whether the user is set up to use the menu group configured for the user group.

Kennedy High School
User Group User List

Year: 2009-2010
Report: REV401

- CONFIDENTIAL -

User Name	Login Name	Email	Use Menu Group
User, Teacher	teacher	teacher@edupoint.com	☑
Test Group			
User, Test	test	test@edupoint.com	☑
Update - Adams Elementary			
Rapisura, Michael	Tch2	tch@edupoint.com	☑
Wilson, Rob	rwilson	rwilson@edupoint.com	☐
Carroll, Natalie	tch	tch@edupoint.com	☐
Weathers, Renee	Renee	Renee.Weathers@edupoint.com	☑
Fuller, Rebecca	tch3	rfuller@anywhere.com	☐
McGrew, Tom	tmcgrew	tmcgrew@edupoint.com	☐
Casey, Ken	tch6	kcasey@schools.org	☐
Update - Continuation High School			
Hagen, Al	tchc	alhagen@schools.org	☐
Update - District			
User, Teacher	teacher	teacher@edupoint.com	☐
Harker, Garth	gharker	gharker@my.com	☐
Hom, Cissy	chom	a@l	☐
User, Test	test	test@edupoint.com	☐
Weathers, Renee	Renee	Renee.Weathers@edupoint.com	☑
Borgen, Jessica	clerk	JBorgen@Adams.com	☑
Weathers, Julia	Julia	Julia.Weathers@edupoint.com	☐
McGrew, Tom	tmcgrew	tmcgrew@edupoint.com	☐
Wilson, Rob	rwilson	rwilson@edupoint.com	☐
Update - Grant Elementary			
Carroll, Natalie	tch	tch@edupoint.com	☐
Update - Hope High School			
Sullivan, Joe	tchs2	tchs2@edupoint.com	☑
Wilson, Rob	rwilson	rwilson@edupoint.com	☐
User, Test	test	test@edupoint.com	☐
User, Teacher	teacher	teacher@edupoint.com	☐
Jackson, Kathy	tchs	kjackson@a.k12.ca.us	☐
View - Adams Elementary			

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REV401 – User Group User List Report

There is no **Options** tab with customizations for this report.

REV402 – USER LIST

The REV402 – User List report provides an alphabetical listing of the users that includes user name, login name, and email address. It also lists the user groups assigned to the user, and indicates which user group's menu is used.

Kennedy High School
User List

Year: 2009-2010
Report: REV402

- CONFIDENTIAL -

User Name	Login Name	Email	Use Menu Group	User Group Name
Borgen, Jessica	clerk	JBorgen@Adams.com	☑	Role - Attendance Daily Update - District Role - Clerk Role - Genesis User
Carroll, Natalie	tch	tch@edupoint.com	☐	Update - Adams Elementary Update - Grant Elementary Role - Teacher Elementary
Casey, Ken	tch6	kcasey@schools.org	☑	Role - Teacher Elementary Update - Adams Elementary
Fuller, Rebecca	tch3	rfuller@anywhere.com	☑	Role - Teacher Elementary Update - Adams Elementary
Grayson, Nicolas	NGrayson	NGrayson@Adams.com	☐	
Green, Tom	TGreen	TGreen@Adams.com	☐	
Growan, Rachael	RGrowan	RGrowan@Adams.com	☐	
Hagen, Al	tchc	alhagen@schools.org	☑	Role - Teacher Secondary Update - Continuation High School
Harker, Garth	gharker	gharker@my.com	☑	Role - Admin Update - District
Horn, Cissy	chorn	a@l	☐	Update - District Role - Admin
Hyde, Kathy	kathy	khyde@edupoint.com	☐	
Jackson, Kathy	tchs	kjackson@a.k12.ca.us	☑	Role - Teacher Secondary Update - Hope High School
Martinez, Alberto	amartinez	amartinez@school.org	☐	
McGrew, Tom	tmcgrew	tmcgrew@edupoint.com	☑	Role - Admin Update - Adams Elementary Update - District Role - Clerk
Rapisura, Michael	Tch2	tch@edupoint.com	☑	Update - Adams Elementary Role - Teacher Elementary
Smith, Jk	jksmith	jksmith@edupoint.com	☐	
Smith, John	JSmith	JSmith@Adams.com	☐	
Sullivan, Joe	tchs2	tchs2@edupoint.com	☑	Update - Hope High School Role - Teacher Secondary
User, Admin	Admin	admin@edupoint.com	☐	
User, Teacher	teacher	teacher@edupoint.com	☐	Update - District Role - TXP Period Attendance Update - Hope High School
User, Test	test	test@edupoint.com	☑	Test Group Update - District Update - Hope High School
Voirin, Cheryl	cvoirin	cheryl.voirin@edupoint.com	☐	
Weathers, Julia	Julia	Julia.Weathers@edupoint.com	☑	Role - Admin Role - Genesis User Update - District
Weathers, Renee	Renee	Renee.Weathers@	☑	

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REV402 – User List Report

There is no **Options** tab with customizations for this report.

Chapter Twelve: SECURITY

This chapter covers:

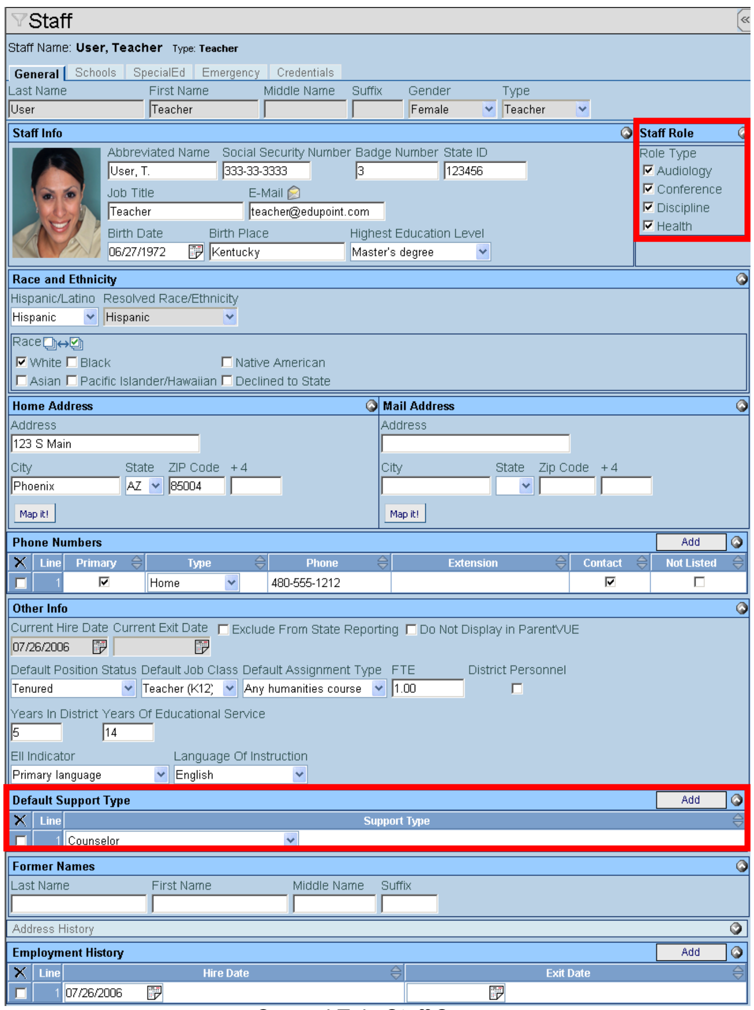
- ► Where security for system-related screens may be defined

Security for each of the screens discussed throughout this manual is defined by two options: **Synergy SIS > System > Security > PAD Security** and **Synergy SIS > System > Security > Security Definition**. How these screens work and how security is defined is covered in detail in the *Synergy SIS – Security Administrator Guide*. This chapter outlines where the security for each part of each system-related screen may be defined in the **Security Definition** screen.

STAFF SECURITY

The **General** tab of **Synergy SIS > Staff > Staff** is controlled by this security node:

K12.Staff



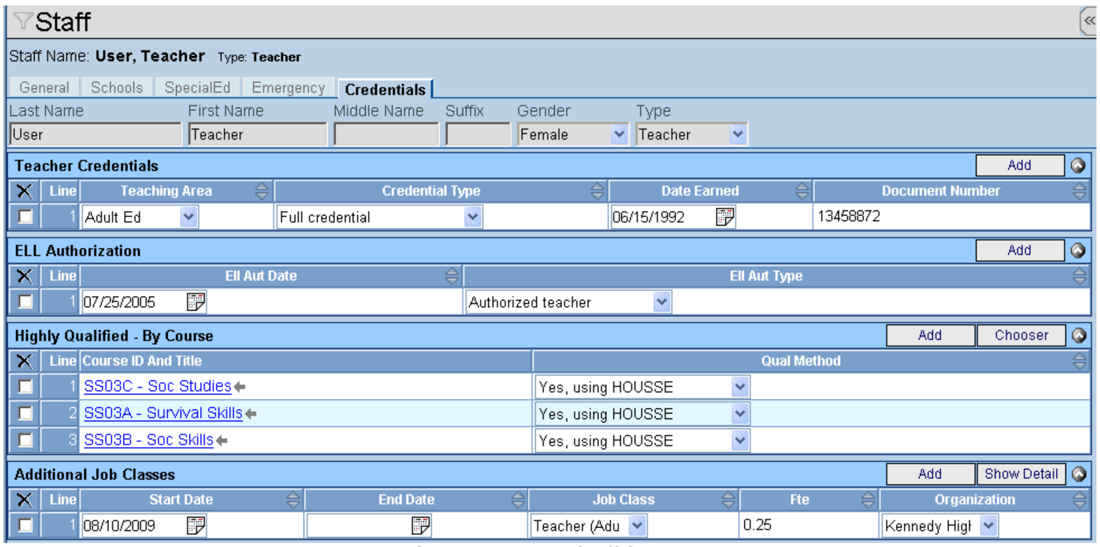
General Tab, Staff Screen

The security node **K12.StaffDefaultSupportType** controls the **Default Support Type** section.

The security node **K12.StaffRole** controls the **Staff Role** section.

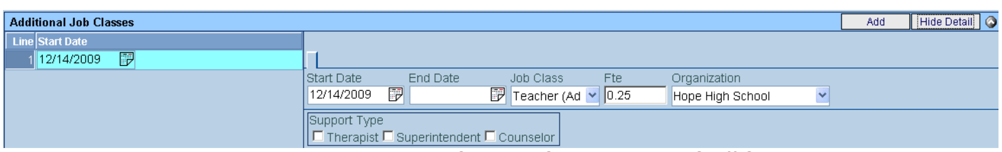
The **Credentials** tab of the **Staff** screen is controlled by the following security nodes:

- **K12.StaffCredential** controls the **Teacher Credentials** section.
- **K12.StaffELLAuth** controls the **ELL Authorization** section.
- **K12.StaffCourseQualification** controls the **Highly Qualified – By Course** section.
- **K12.STAFFAdditionalJobClasses** controls the **Additional Job Classes** section.



Credentials Tab, Staff Screen

The security node **K12.StaffAdditionalJobSupportType** controls the detail screen of the **Additional Job Classes** records.



Detail View, Additional Job Classes, Credential Tab, Staff Screen

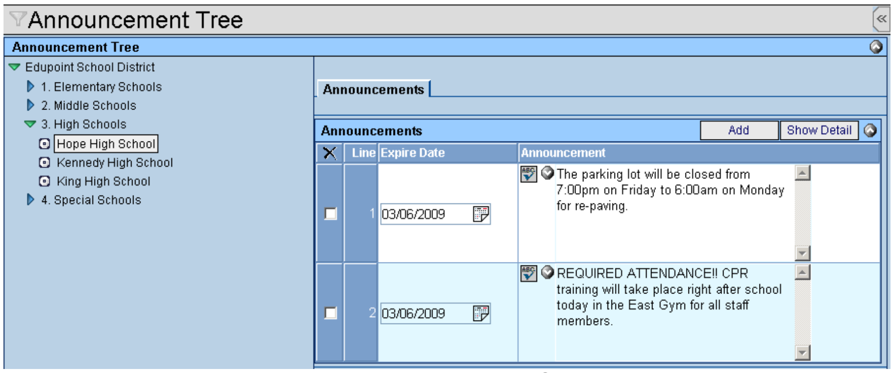
The following security nodes do not provide a visible change in security on the **Staff** screen:

- K12.StaffYearReport
- K12.StaffyearReportAssign
- K12.StaffDepartment
- K12.StaffFindList
- K12.StaffFindSelect
- K12.StaffSchoolYear
- K12.StaffSectionGrid
- K12.StaffUI

ANNOUNCEMENT TREE SECURITY

Synergy SIS > System > Announcements > Announcement Tree is controlled by the following security node:

Revelation.Announcement.RevAnnouncement



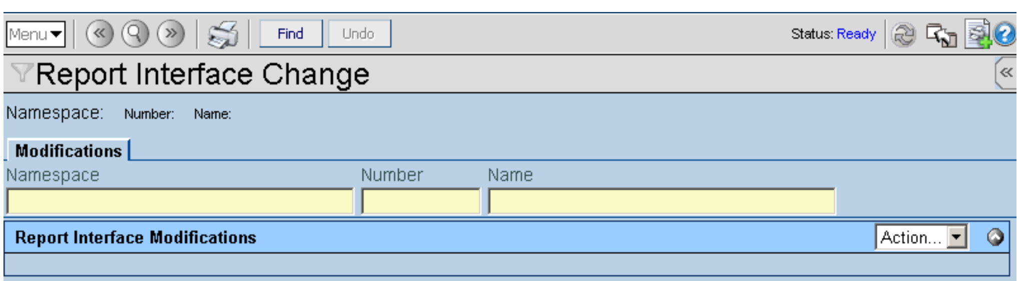
Announcement Tree Screen

The following security nodes do not provide a visible change in security on the Announcement Tree screen:

- K12.POVInfo.AnnouncementGrid
- K12.POVInfo.POVMainUI
- K12.POVInfo.TaskGrid
- Revelation.Announcement.RevAnnouncementGridUI
- Revelation.Announcement.RevAnnouncementTree
- Revelation.Announcement.RevAnnouncementUser

REPORT INTERFACE CHANGE SECURITY

Synergy SIS > System > Data and Views > Report Interface Change is not controlled by any security node.



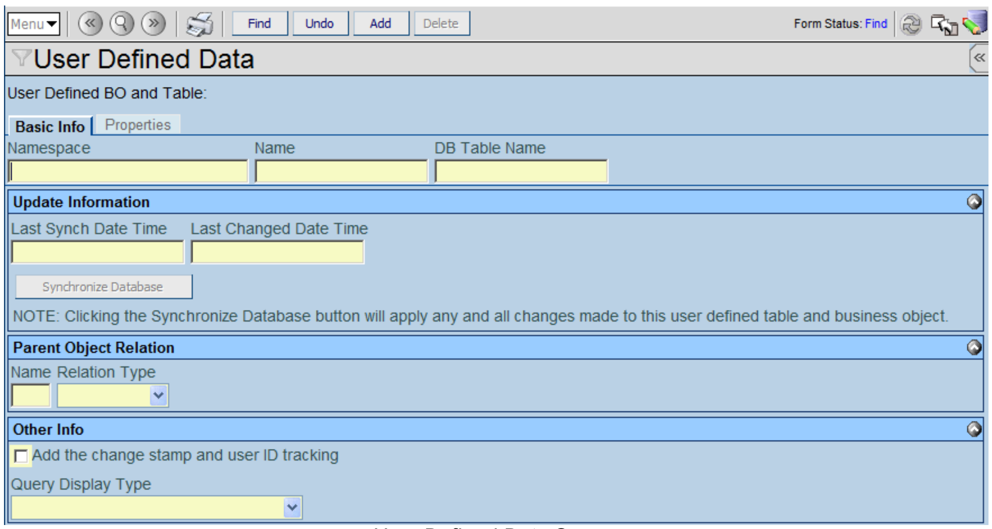
Report Interface Change Screen

The following security nodes do not provide a visible change in security on the **Report Interface Change** screen:

- Revelation.ReportDef
- Revelation.ReportDefChange
- Revelation.ReportDefChangeTree
- Revelation.ReportDefGroup
- Revelation.ReportDefSubReport

USER DEFINED DATA SECURITY

Synergy SIS > System > Data and Views > User Defined Data is not controlled by any security node.

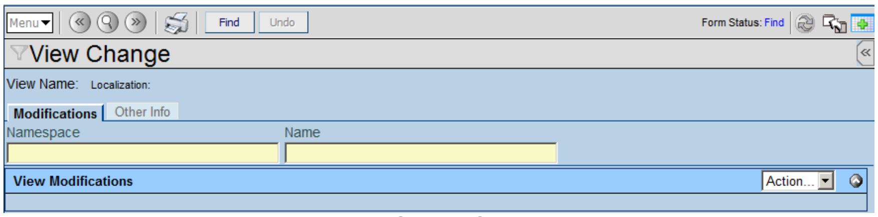


User Defined Data Screen

View Change Security

Synergy SIS > System > Data and Views > View Change is controlled by this security node:

Revelation.ViewDefChgTree



View Change Screen

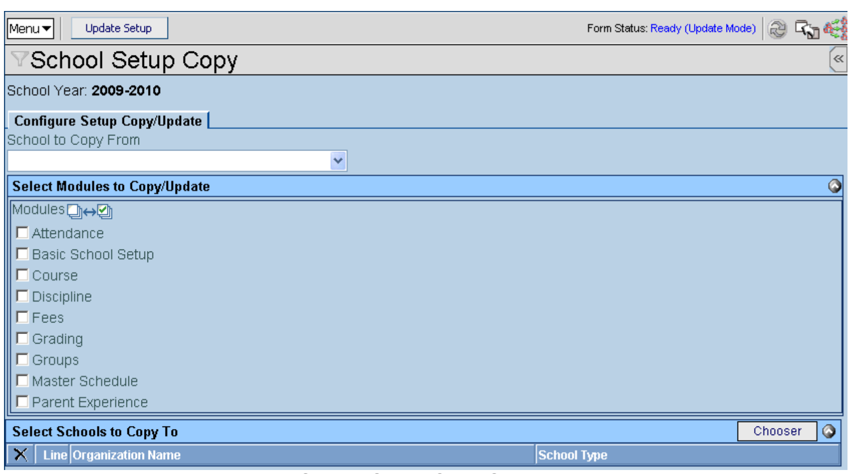
The following security nodes do not provide a visible change in security on the **View Change** screen:

- Revelation.ViewDef
- Revelation.ViewDefChange

School Setup Copy Security

The **Select Schools to Copy To** grid of **Synergy SIS > System > Data Maintenance > School Setup Copy** is controlled by this security node:

K12.Setup.SchoolSetupCopyGrid



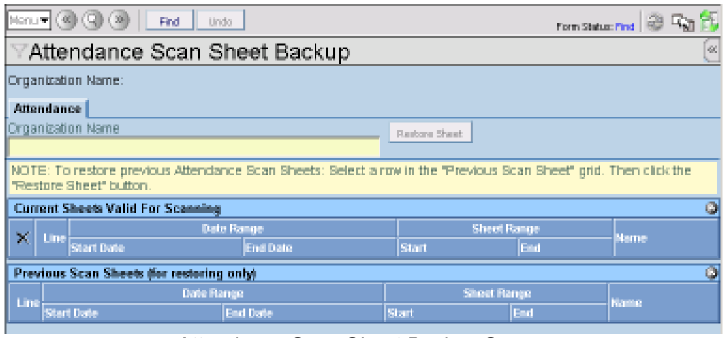
School Setup Copy Screen

The following security nodes do not provide a visible change in security on the **School Setup Copy** screen:

- K12.Setup.SchoolSetupCopyUI

Attendance Scan Sheet Backup Security

Synergy SIS > System > Scanning > Attendance Scan Sheet Backup is not controlled by any security node.



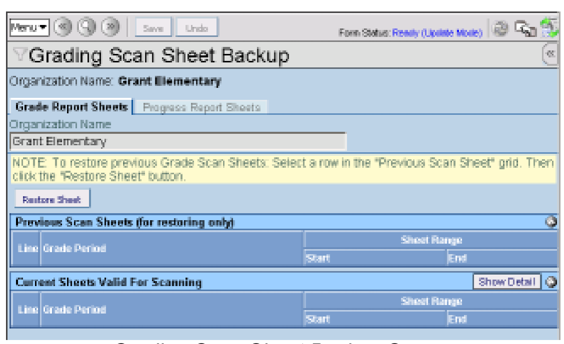
Attendance Scan Sheet Backup Screen

The following security nodes do not provide a visible change in security on the **Attendance Scan Sheet Backup** screen:

- Revelation.Scanninginfo.ScanningInfo
- Revelation.Scanninginfo.ScanningUI
- Revelation.Scanninginfo.ScanningUserDefined
- K12.SystemInfo.ScanSheetHoldingInfoMaint
- K12.SystemInfo.ScanSheetHoldingInfoMaintUI

Grading Scan Sheet Backup Security

Synergy SIS > System > Scanning > Grading Scan Sheet Backup is not controlled by any security node.



Grading Scan Sheet Backup Screen

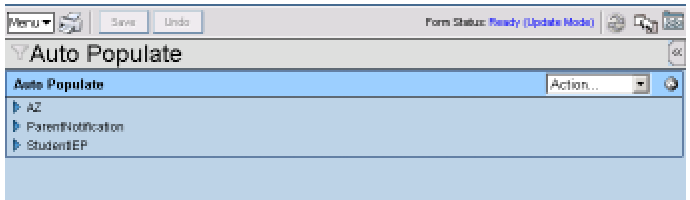
The following security nodes do not provide a visible change in security on the **Grading Scan Sheet Backup** screen:

- K12.SystemInfo.GrdScanSheetHoldingInfoMaint
- K12.SystemInfo.GrdScanSheetHoldingInfoMaintUI

AUTO POPULATE SECURITY

Synergy SIS > System > Setup > Auto Populate is controlled by the following security node:

Revelation.AutoPopulate.RevAutoPopulate



Auto Populate Screen

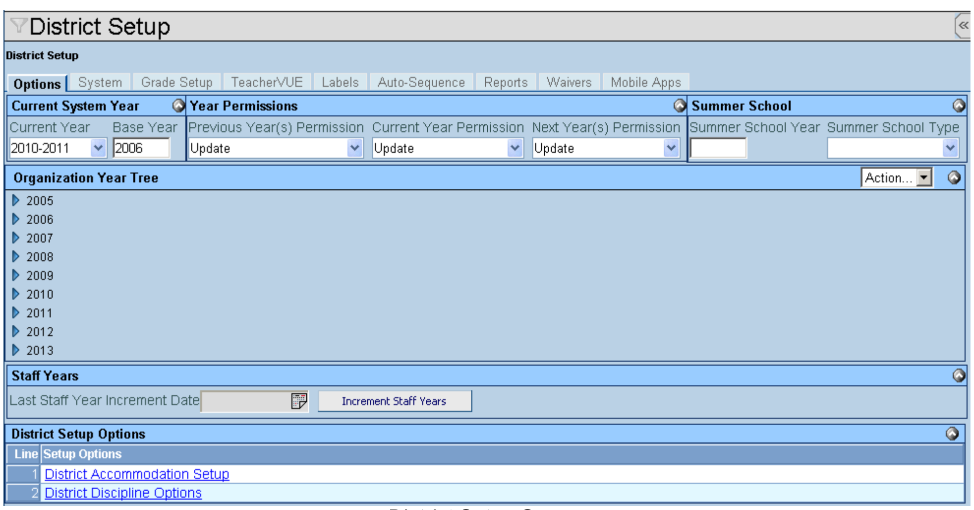
The following security nodes do not provide a visible change in security on the **Auto Populate** screen:

- Revelation.AutoPopulate.RevAutoPopulateResponse
- Revelation.AutoPopulate.RevAutoPopulateTree

DISTRICT SETUP SECURITY

Synergy SIS > System > Setup > District Setup is controlled by this security node:

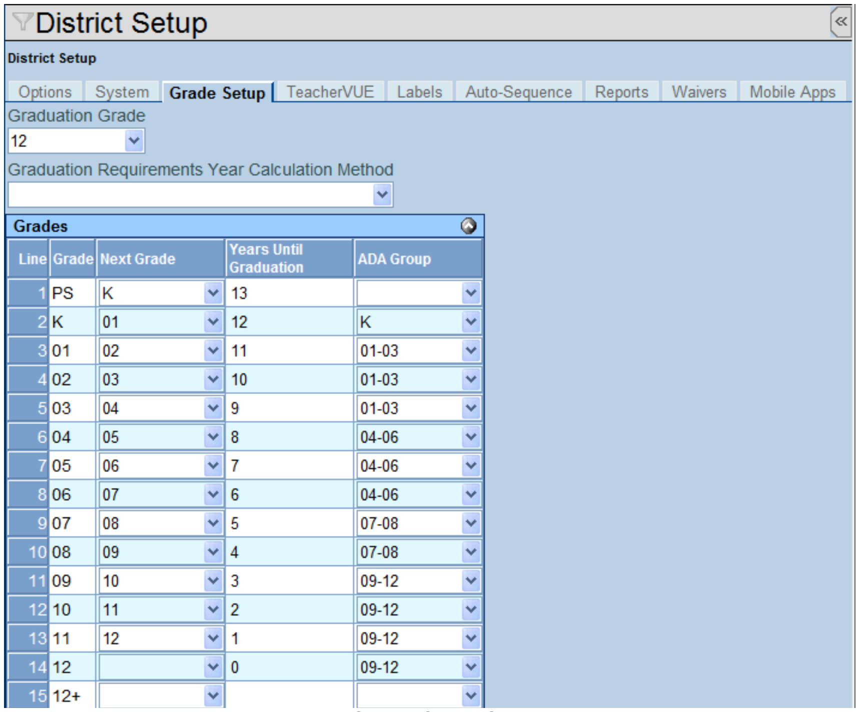
K12.Setup.DistrictSetup



District Setup Screen

The **Grade Setup** tab of the **District Setup** screen is controlled by this security node:

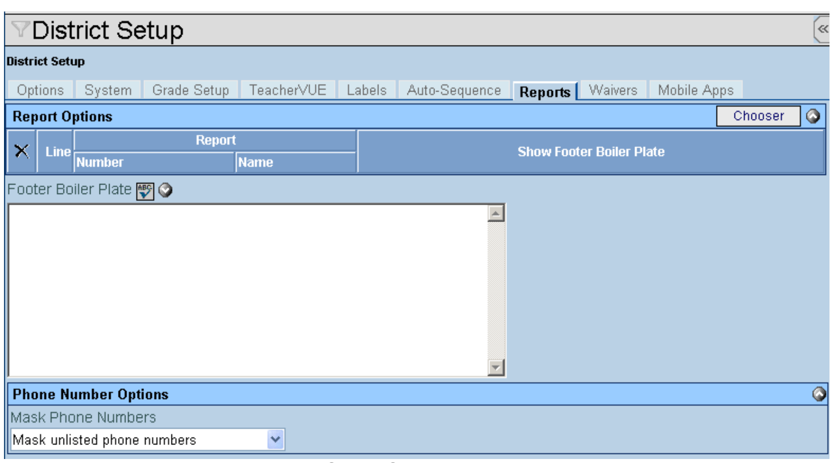
K12.Setup.DistrictGradeGrid



District Setup, Grade Setup Tab

The **Reports** tab of the **District Setup** screen is controlled by the security nodes:

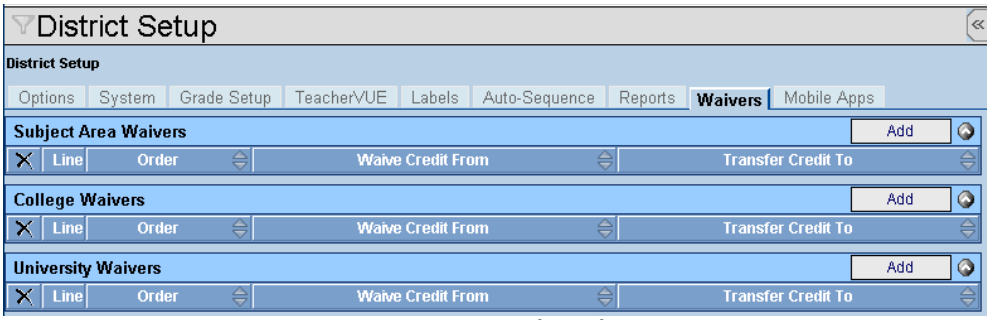
- **K12.Setup.DistrictReportDefOptions** controls the **Footer Boiler Plate** box.
- **K12.Setup.DistrictReportDefOptionsGrid** controls the **Report Options** grid.



District Setup Screen, Reports Tab

The **Waivers** tab of the **District Setup** screen is controlled by the security nodes:

- **K12.Setup.DistrictCourseWaiverArea** controls the **Subject Area Waivers** grid.
- **K12.Setup.DistrictCourseWaiverColl** controls the **College Waivers** grid.
- **K12.Setup.DistrictCourseWaiverUniv** controls the **University Waivers** grid.



Waivers Tab, District Setup Screen

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

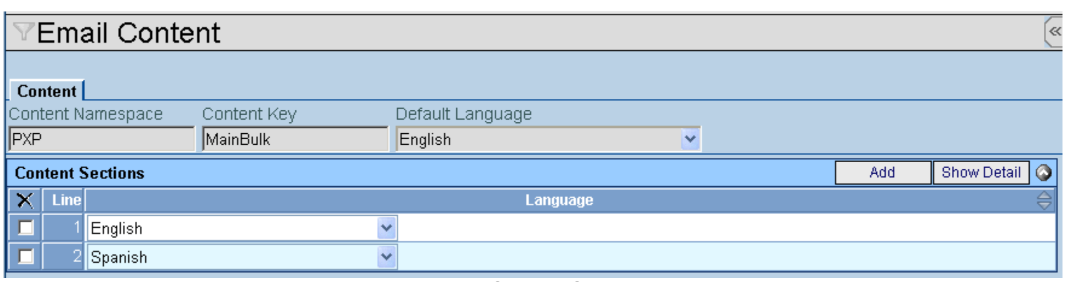
- K12.Setup.DistrictGrade
- K12.Setup.TextYear

EMAIL CONTENT SECURITY

Synergy SIS > System > Setup > Email Content is controlled by the following security node:

Revelation.EmailContent

The **Content Sections** section is controlled by the node **Revelation.EmailContentValue**.



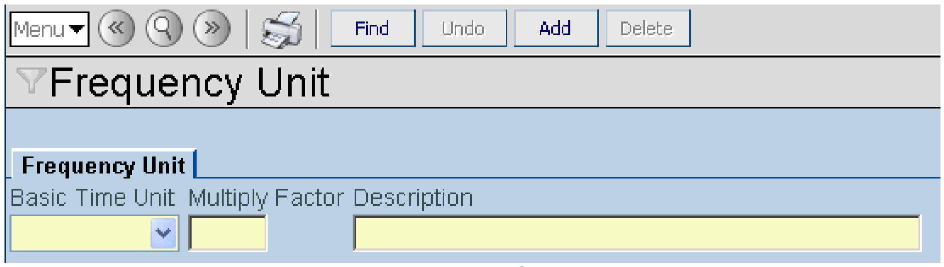
Email Content Screen

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

- Revelation.EmailContentValueUI
- Revelation.EmailQueue

FREQUENCY UNIT SECURITY

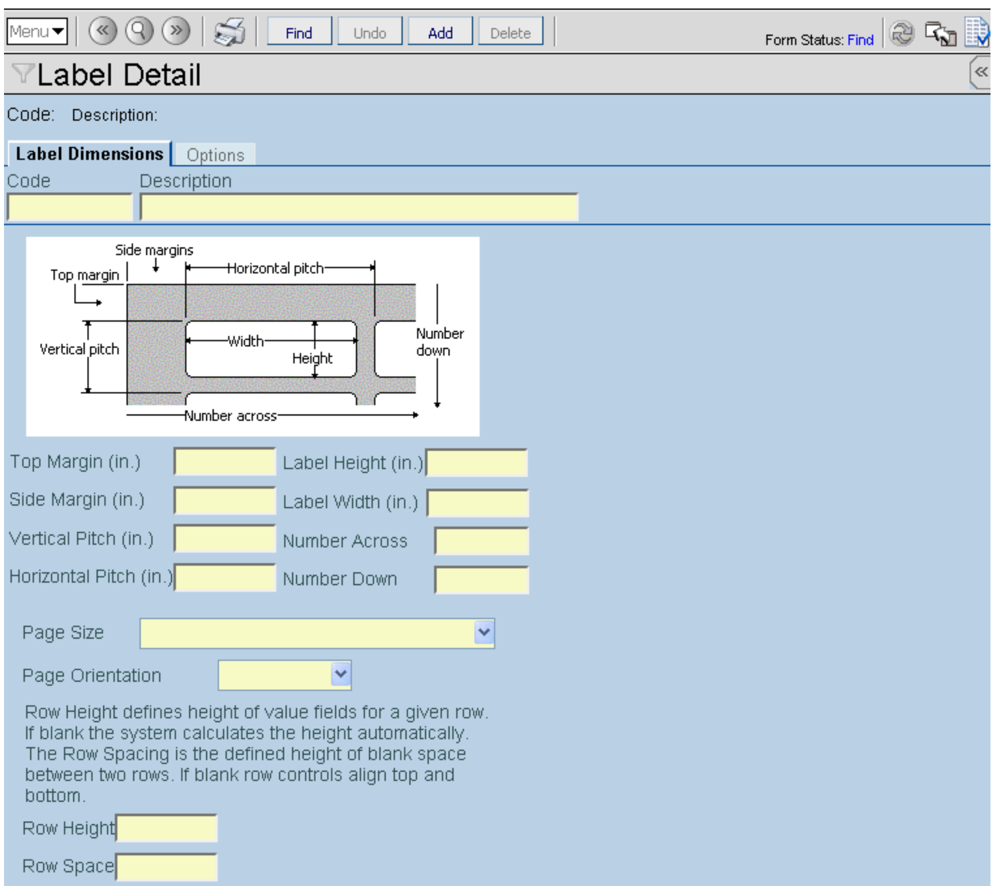
Synergy SIS > System > Setup > Frequency Unit is not controlled by any security node.



Frequency Unit Screen

LABEL DETAIL SECURITY

Synergy SIS > System > Setup > Label Detail is not controlled by any security node.



Label Detail Screen

LOOKUP TABLE DEFINITION SECURITY

Synergy SIS > System > Setup > Lookup Table Definition is controlled by this security node:

Revelation.LookupDef.LookupTableValue

Lookup Table Definition Screen

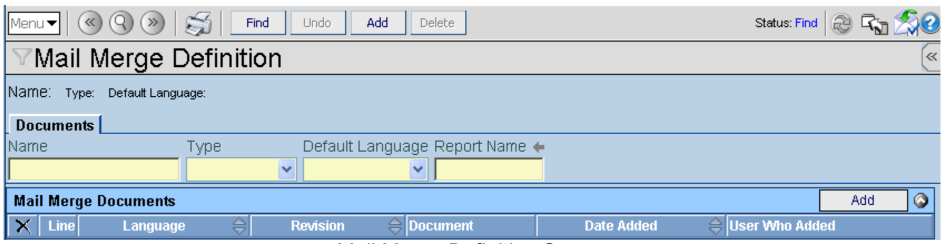
The following security nodes do not provide a visible change in security on the **Lookup Table Definition** screen:

- Revelation.LookupDef.LookupTable
- Revelation.LookupDef.LookupTableTree
- Revelation.LookupDef.LookupTableUI

MAIL MERGE DEFINITION SECURITY

Synergy SIS > System > Setup > Mail Merge Definition is controlled by these security nodes:

- **Revelation.MailMerge** controls the definition, including adding or deleting.
- **Revelation.MailMergeDoc** controls the **Mail Merge Documents** grid.



Mail Merge Definition Screen

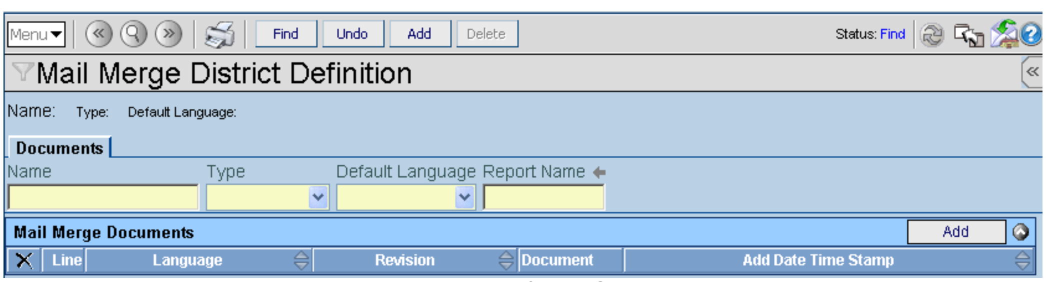
The following security node does not provide a visible change in security:

- Revelation.MailMergeUI

MAIL MERGE DISTRICT DEFINITION SECURITY

Synergy SIS > System > Setup > Mail Merge District Definition is controlled by these security nodes:

- **Revelation.MailMergeDistrict** controls the definition, including adding or deleting.
- **Revelation.MailMergeDistrictDoc** controls the **Mail Merge Documents** grid.



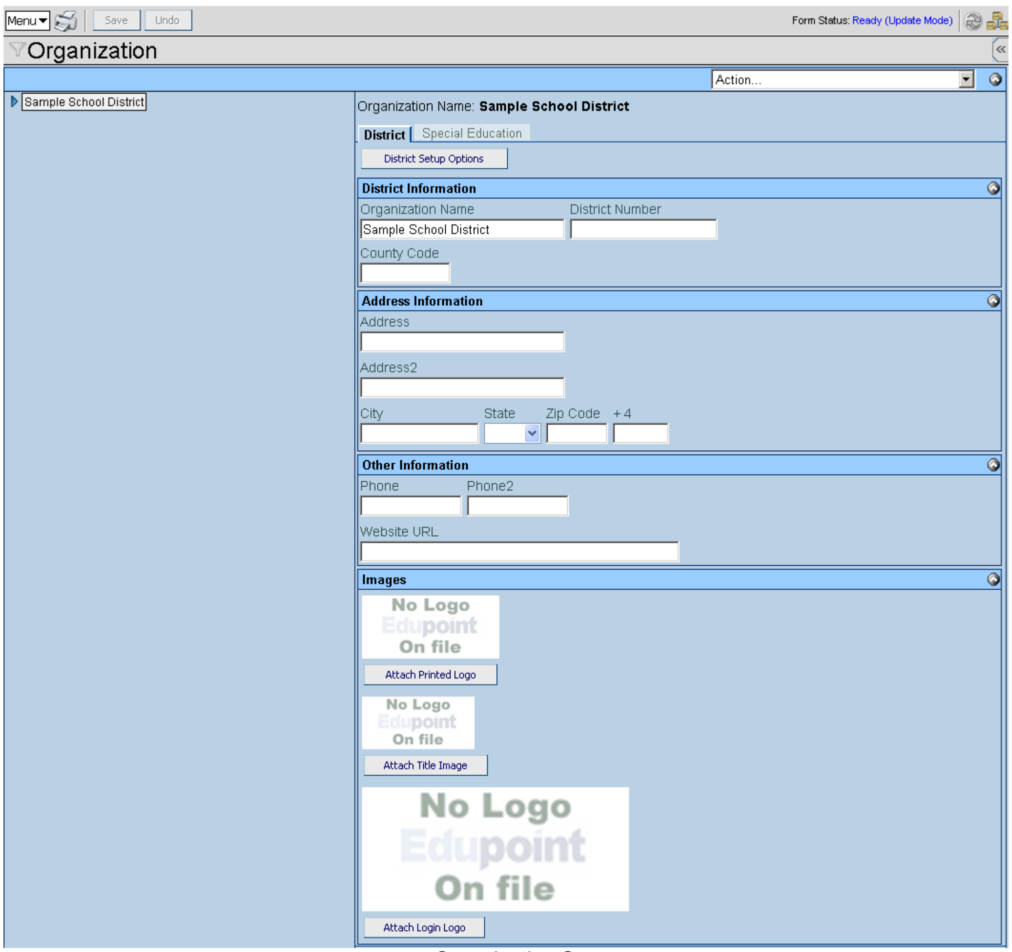
Mail Merge Definition Screen

ORGANIZATION SECURITY

The **District** tab, visible in the detail screen of **Synergy SIS > System > Setup > Organization** when the district is selected in the tree, is controlled by this security node:

Revelation.OrganizationInfo.RevOrganization

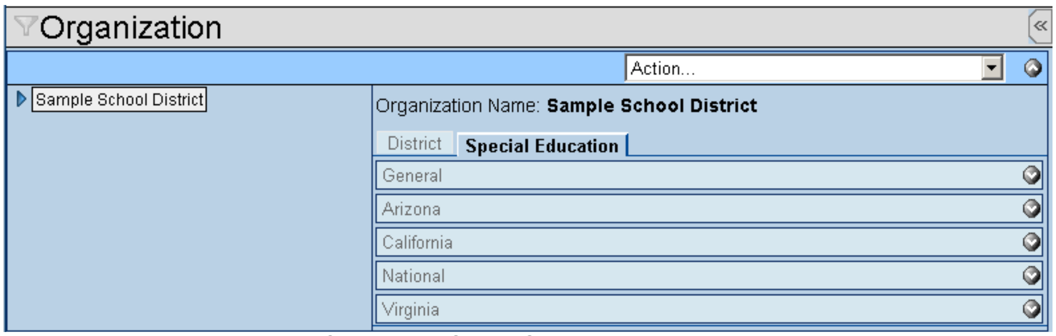
The security node **Revelation.OrganizationInfo.OrganizationTree** controls the adding and deleting of organizations.



Organization Screen

The **Special Education** tab is controlled by these security nodes:

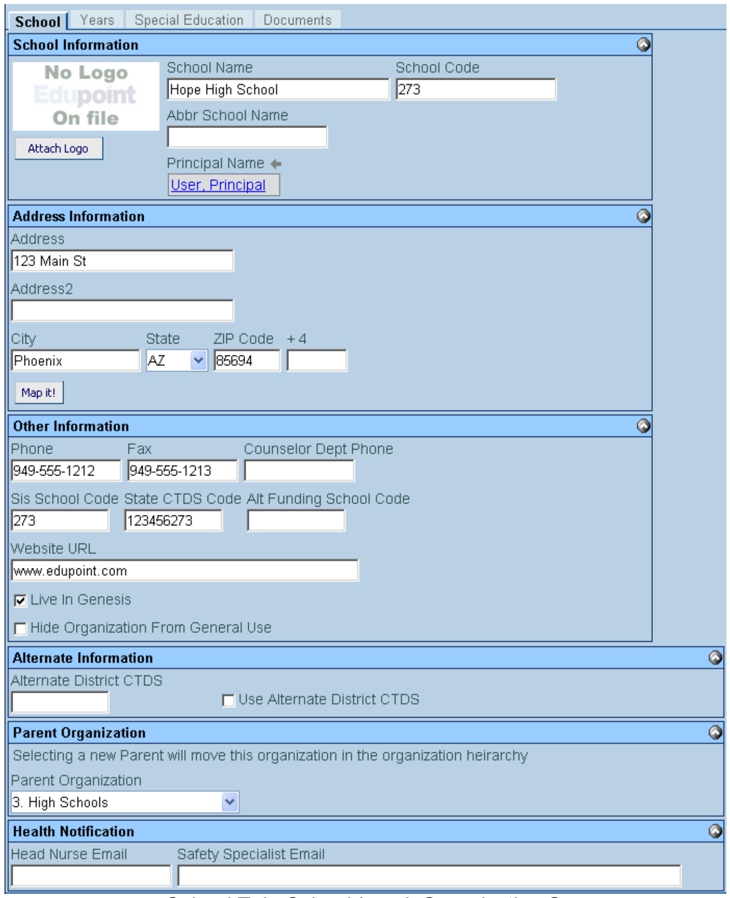
- **K12.Setup.SpecialEdDeptInfo** controls the **District Information** section.
- **K12.Setup.SpecialEdIEPAppOptions** controls the IEP Referral Timeline Days field, the Medicaid Billing Agency field, and the Secondary Threshold Grade field. It also controls the Goal Library Use Need Area Instead of Subject Area checkbox and the Transfer IEP Data to AZ SAIS check box.
- **K12.Setup.SpecialEdIEPOptions** controls the Section A-B field, the Section C–D-E field, and the IEP Service Staff Disclaimer field.



Organization Screen Special Education Tab

The **School** tab of schools in the **Organization** screen is controlled by this security node:

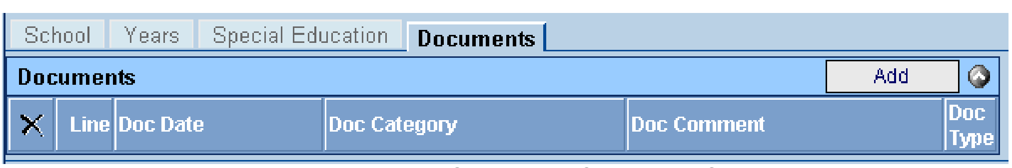
K12.School



School Tab, School-Level, Organization Screen

The **Documents** tab of schools is controlled by this security node:

Revelation.OrganizationInfo.RevOrganizationAttachDoc



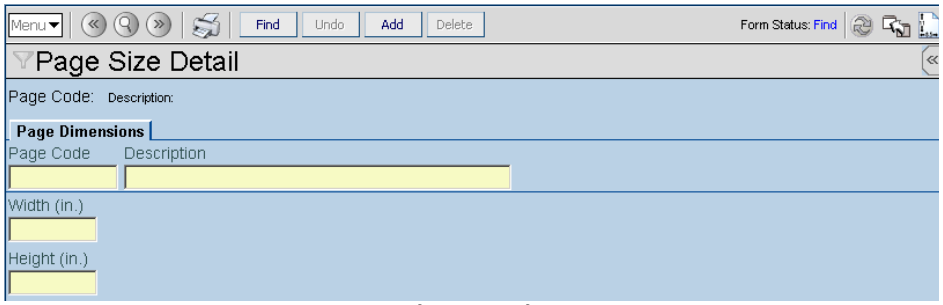
Documents Tab, School-level, Organization Screen

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

- Revelation.OrganizationInfo.RevOrganizationUI
- Revelation.OrganizationInfo.RevOrganizationYear
- Revelation.OrganizationInfo.RevYear
- Revelation.OrganizationInfo.RevYearOrganization

Page Size Detail Security

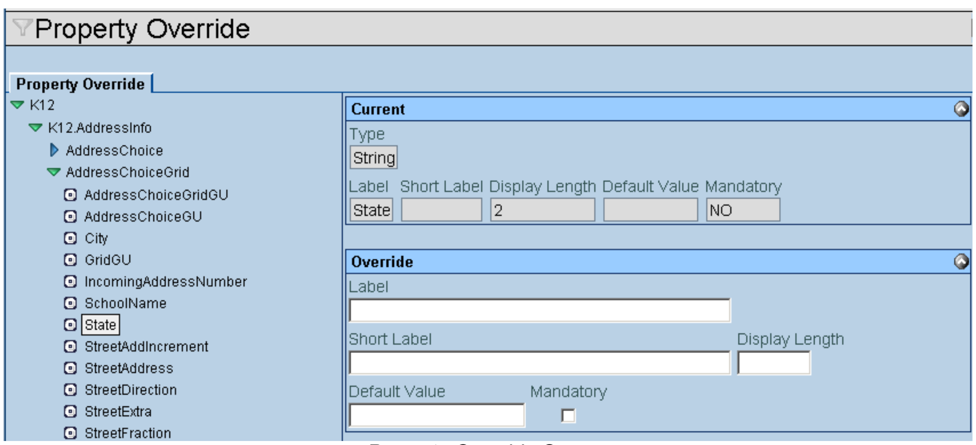
Synergy SIS > System > Setup > Page Size Detail is not controlled by any security node.



Page Size Detail Screen

Property Override Security

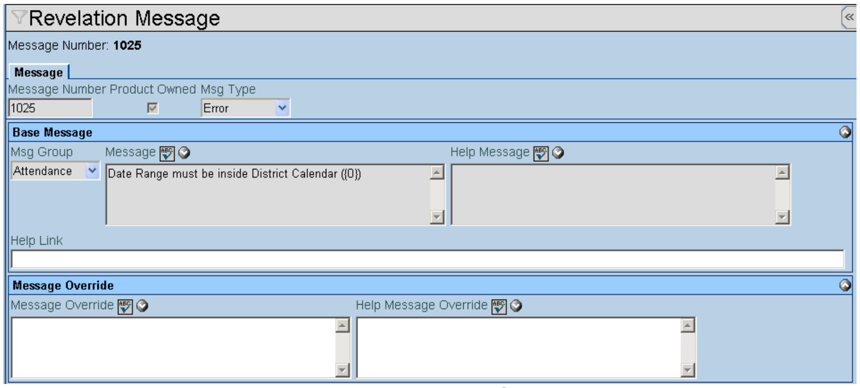
Synergy SIS > System > Setup Property Override is not controlled by any security node.



Property Override Screen

Revelation Message Security

Synergy SIS > System > Setup > Revelation Message is not controlled by any security node.

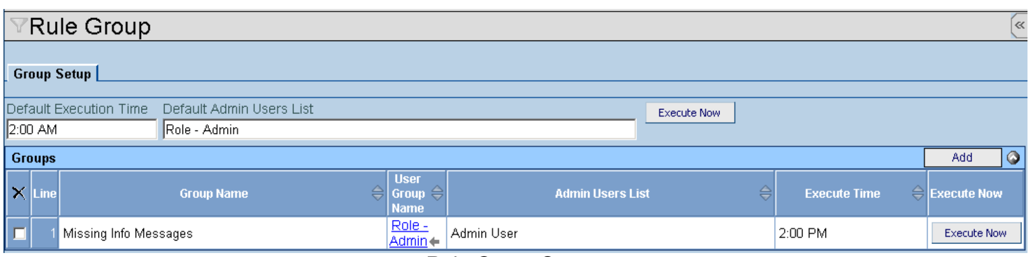


Revelation Message Screen

Rule Group Security

Synergy SIS > System > Setup > Rule Group is controlled by this node:

Revelation.RuleInfo.RuleGroup



Rule Group Screen

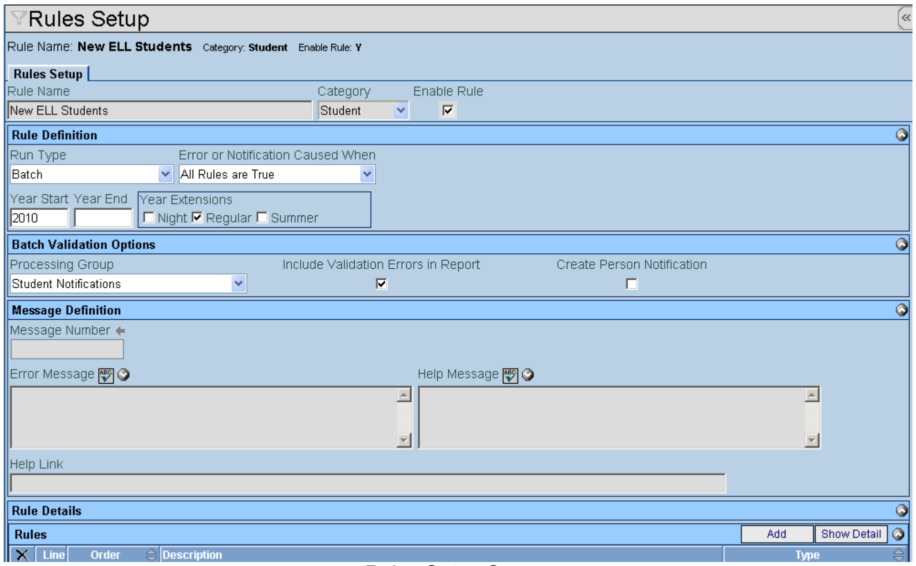
The following security nodes do not provide a visible change in security on the screen:

- Revelation.RuleInfo.RuleBatchNotification
- Revelation.RuleInfo.RuleBatchResult

RULES SETUP SECURITY

Synergy SIS > System > Setup Rules Setup is controlled by this node:

Revelation.RuleInfo.Rule



Rules Setup Screen

The following sections are not controlled by the above security node, but by others.

- **Revelation.RuleInfo.RuleDetail** controls the **Rule Details** grid.
- **Revelation.RuleInfo.RuleYearExtList** controls the **Year Extensions** box.
- **K12.Rules.ELLRule** controls the detail of the **ELL Program Rule**.
- **K12.Rules.ELLRuleLanguageList** controls the list of languages for the **ELL Program Rule**.
- **K12.Rules.ELLRuleProgramList** controls the list of programs for the **ELL Program Rule**.
- **K12.Rules.StudentRelatedPropertyRule** controls the detail of the **Student Related Property Rule**.
- **K12.Rules.TotalELLSemestersRule** controls the detail of the **Total ELL Semesters Rule**.

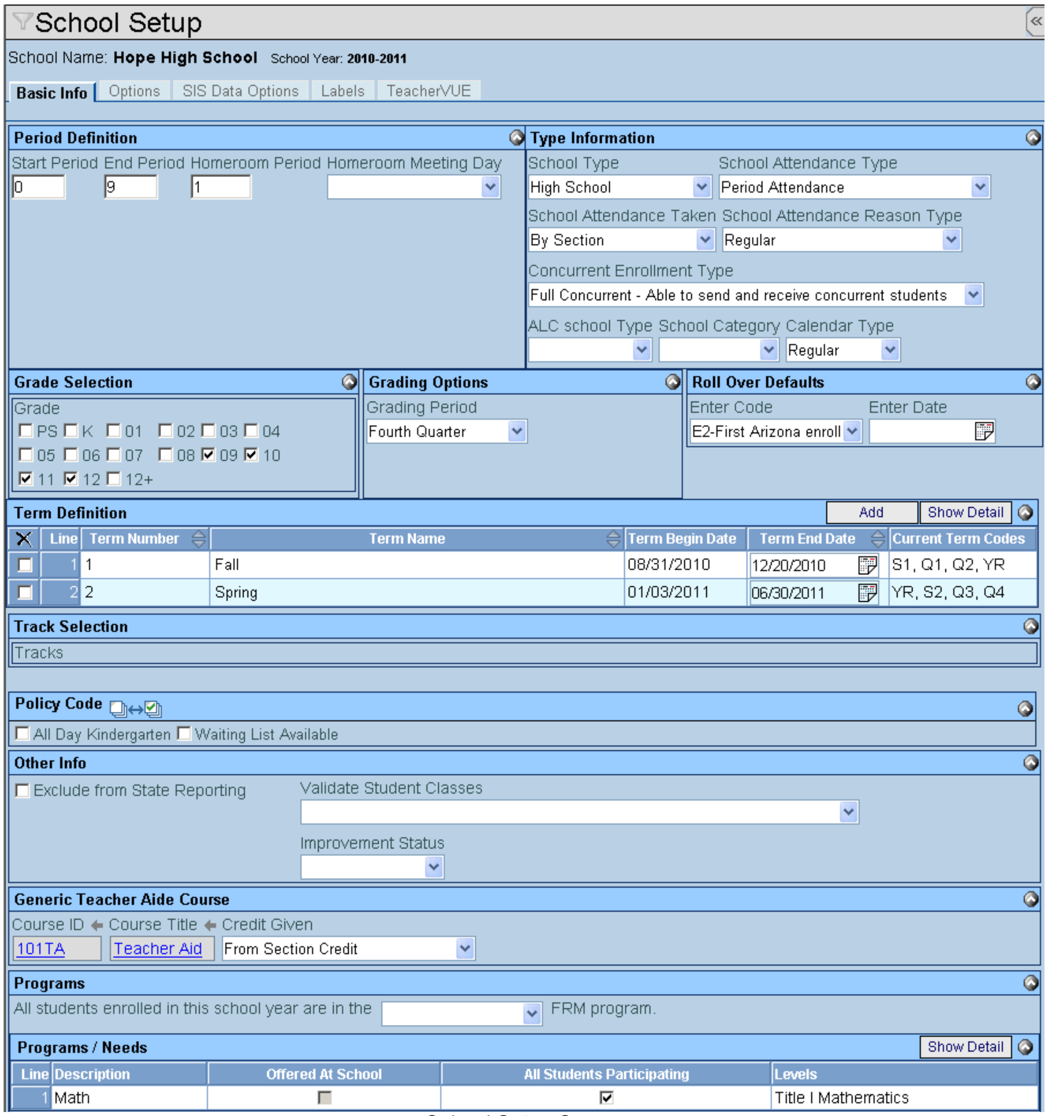
The following security nodes do not provide a visible change in security on the screen:

- Revelation.RuleInfo.RuleUI
- K12.Rules.StudentRuleUI

SCHOOL SETUP SECURITY

All tabs of **Synergy SIS > System > Setup > School Setup** are controlled by this security node:

K12.Setup.SchoolSetup



School Setup Screen

On the **Basic Info** tab, the following sections are not controlled by the above security node, but by others:

- **K12.Setup.SchoolYearTrmDef** controls the **Term Definition** section.
- **K12.Setup.SchoolYearTrmCodes** controls the **Term Codes** grid in the detail screen of each term in the **Term Definition** section.
- **K12.Setup.SchoolYearNeedGrid** controls the **Programs/Needs** section.
- **K12.Setup.SchoolYearNeedGridDetail** controls the detail screen of each program in the **Programs/Needs** section.

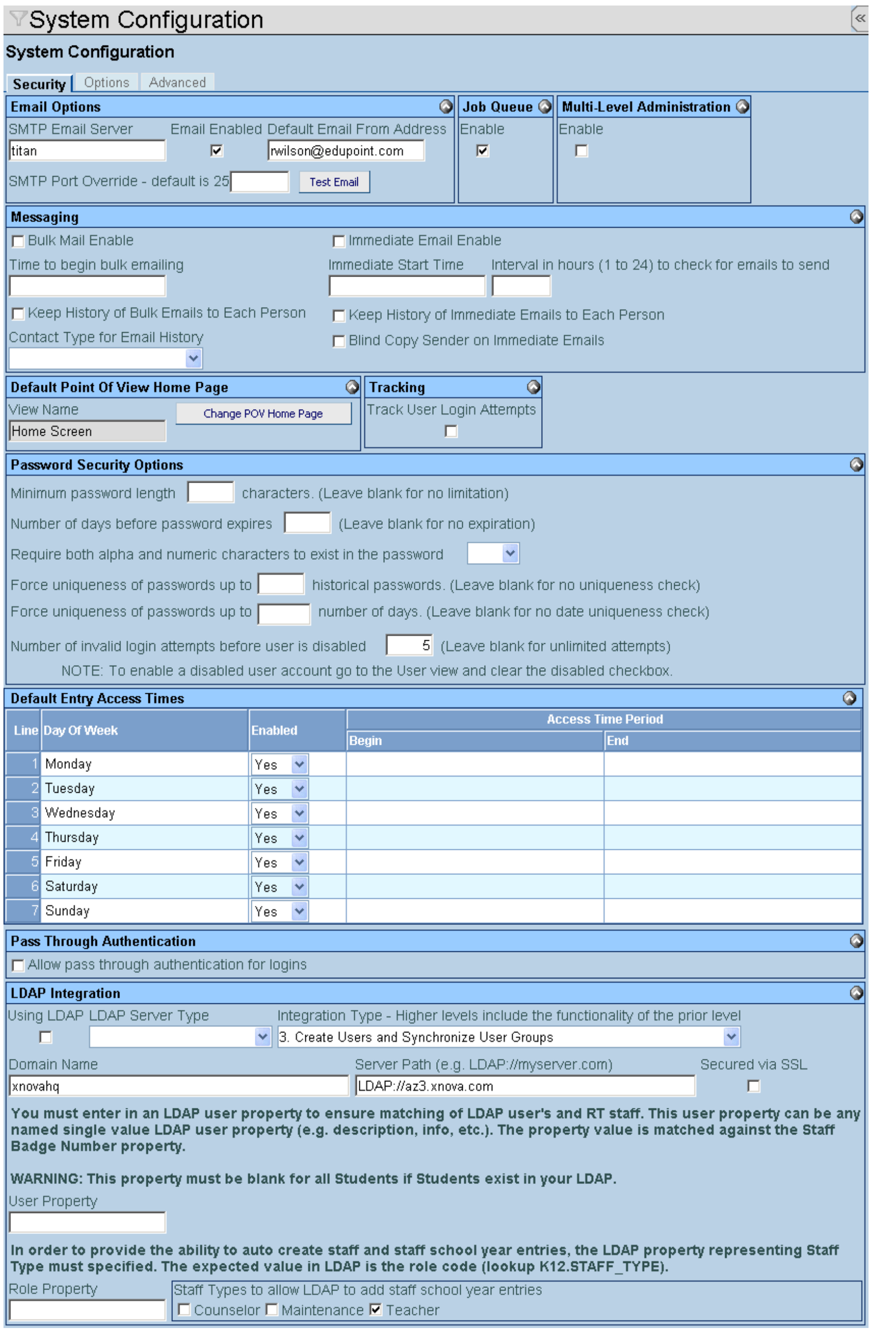
The following security nodes do not provide a visible change in security on the **School Setup** screen:

- K12.SchoolGrade
- K12.Setup.SchoolOptionsSetup
- K12.Setup.SchoolSetupCopyGrid
- K12.Setup.SchoolSetupCopyUI
- K12.Setup.SchoolSetupTracks
- K12.Setup.SchoolSetupUI
- K12.Setup.SchoolYearTrmCodesUI
- K12.Setup.SchoolYearTrmDefTrk
- K12.Setup.SchoolYearTrmDefTrkGrid

SYSTEM CONFIGURATION SECURITY

Synergy SIS > System > Setup > System Configuration is controlled by the security node:

Revelation.OrganizationInfo.SystemConfig



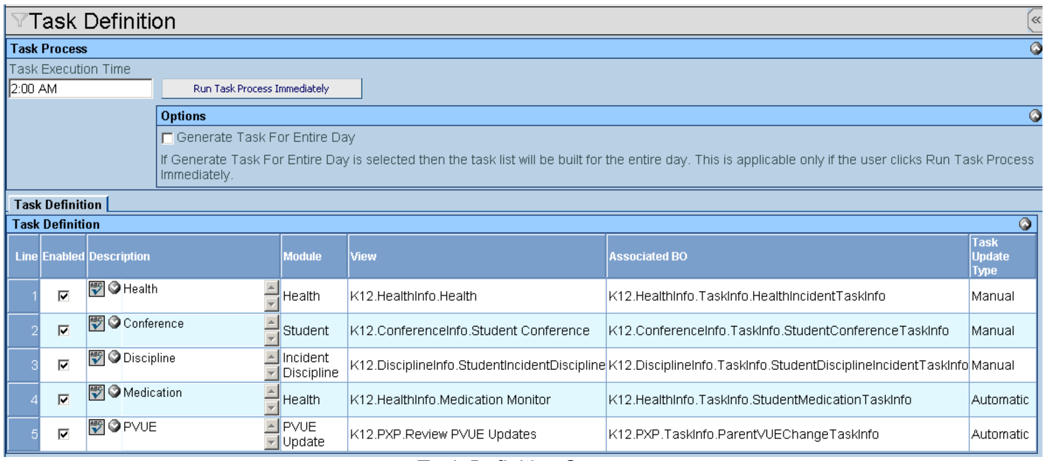
Systems Configuration Screen

The security node **Revelation.OrganizationInfo.UserTimeEntryGrid** controls the **Default Entry Access Times** grid.

TASK DEFINITION SECURITY

Synergy SIS > System > Setup > Task Definition is controlled by the following security node:

Revelation TaskDefGrid



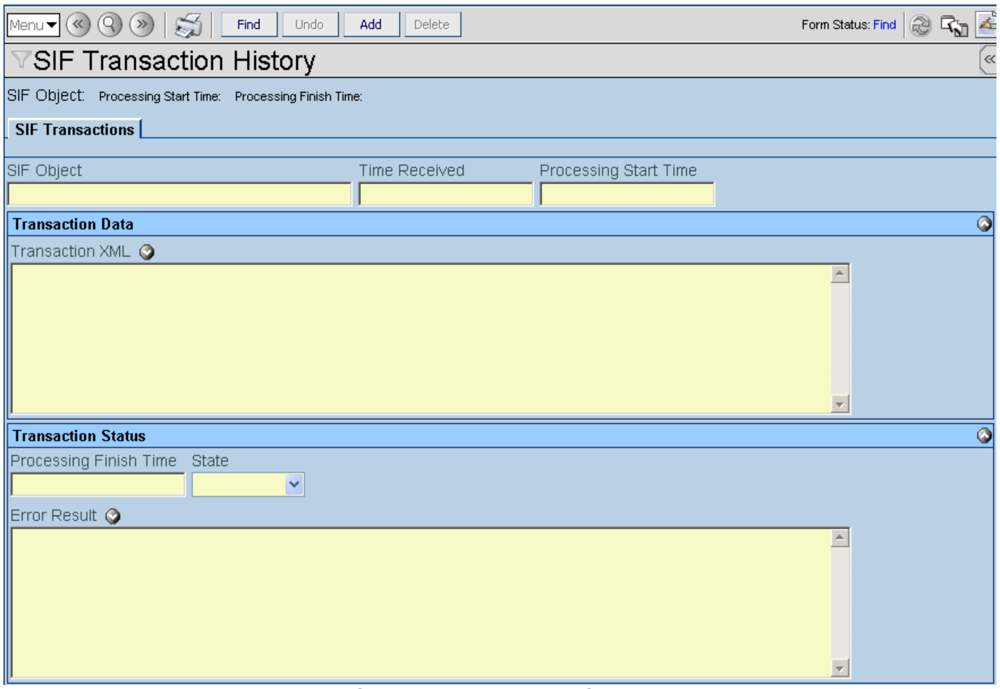
Task Definition Screen

The following security nodes do not provide a visible change in security on the **Task Definition** screen:

- Revelation.Task
- Revelation TaskDef
- Revelation TaskDefClt
- Revelation TaskDefUI

SIF TRANSACTION HISTORY SECURITY

Synergy SIS > System > SIF > SIF Transaction History is not controlled by any security node.



SIF Transaction History Screen

The following security nodes do not provide a visible change in security on the **SIF Transaction History** screen:

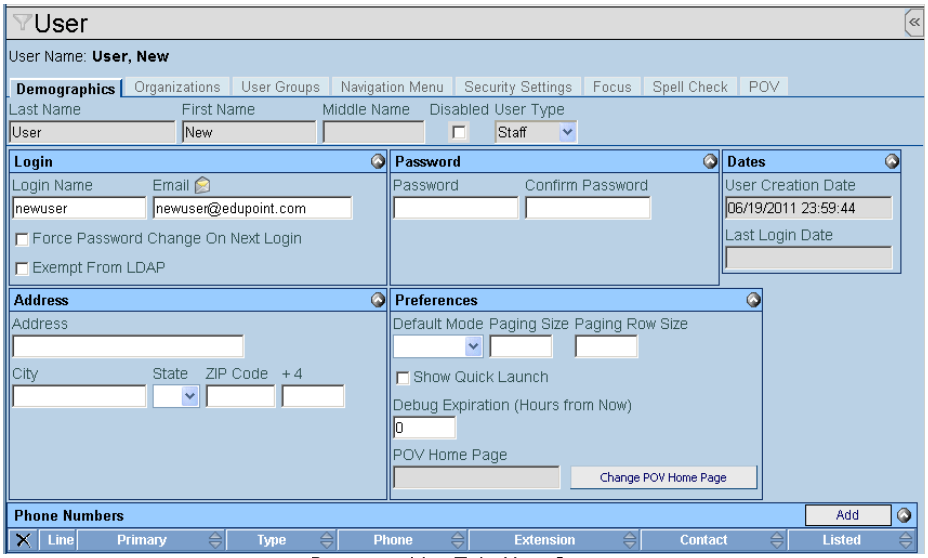
- K12.SIFStudent
- Revelation.SIFInfo.SIF
- Revelation.SIFInfo.SIFObjectBOXref
- Revelation.SIFInfo.SIFTransaction

USER SECURITY

The **Demographics** tab of **Synergy SIS > System > User > User** is controlled by this security node:

K12.SystemInfo.SISUser

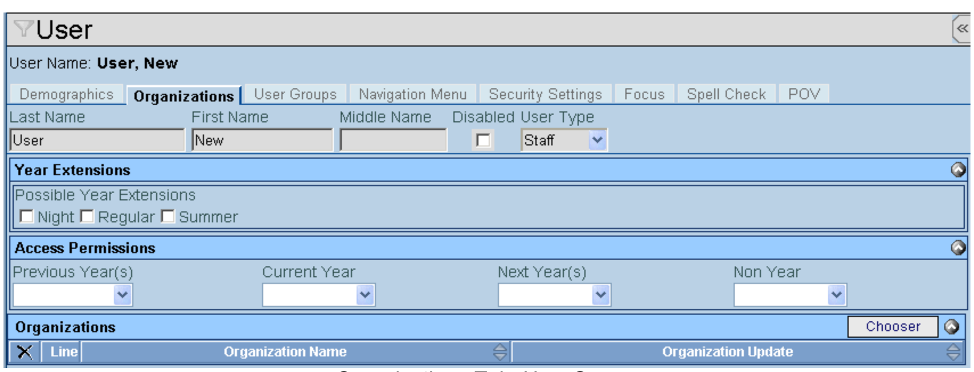
This security node also controls some of the **Organizations** tab and some of the **POV** tab.



Demographics Tab, User Screen

The **Organizations** tab of the **User** screen is controlled by the security nodes:

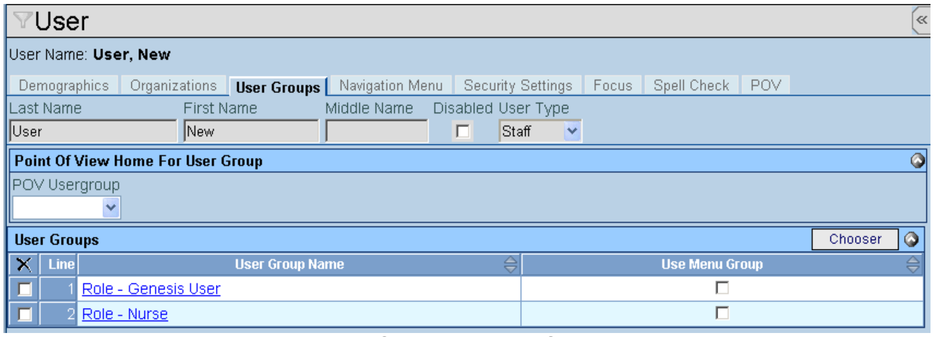
- **Revelation.UserInfo.RevUserExtLst** controls the **Year Extensions** section.
- **K12.SystemInfo.SISUser** controls the **Access Permissions** section. This node also controls the **Demographics** tab and **POV** tab.
- **Revelation.UserInfo.RevUserOrganizations** controls the **Organizations** grid.



Organizations Tab, User Screen

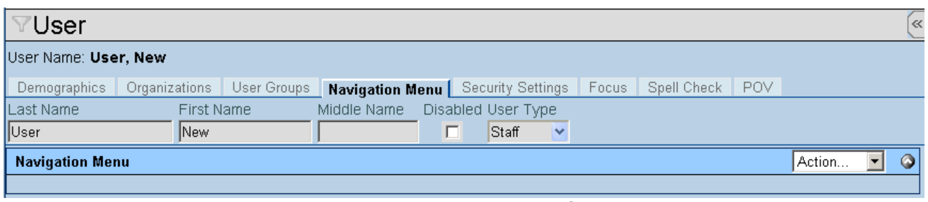
The **User Groups** tab of the **User** screen is controlled by this security node:

K12.SystemInfo.SISUserUserGroup



User Groups tab, User Screen

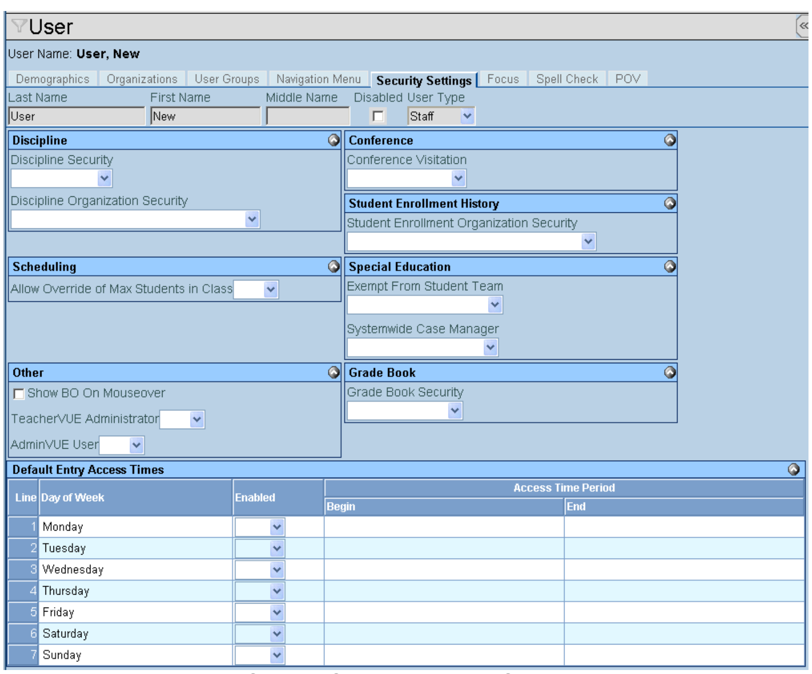
The **Navigation Menu** tab of the **User** screen is not controlled by any security nodes.



Navigation Menu Tab, User Screen

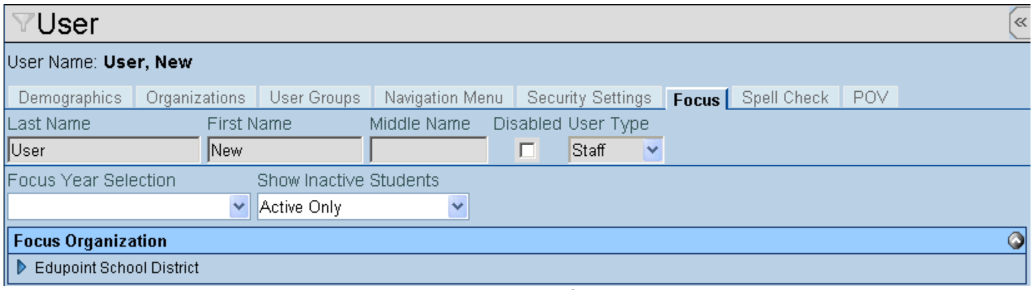
The **Security Settings** tab of the **User** screen is controlled by these security nodes:

- **K12.SystemInfo.User** controls everything but the **Default Entry Access Times** grid.
- **K12.SystemInfo.UserTimeEntryGrid** controls the **Default Entry Access Times** grid.



Security Setting Tab, User Screen

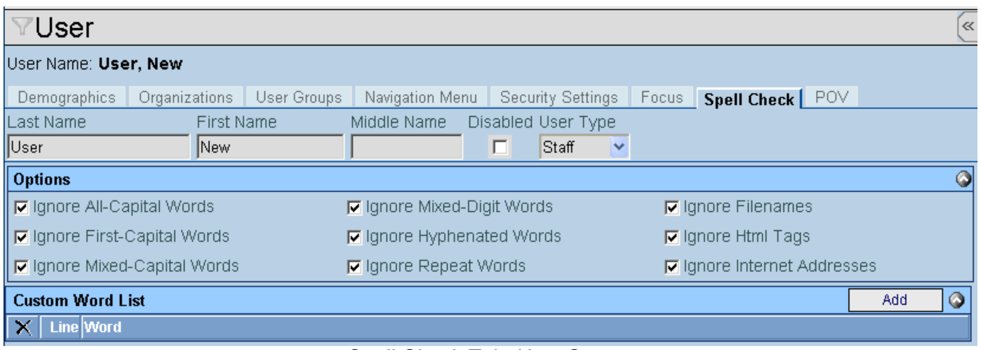
The **Focus** tab of the **User** screen is not controlled by any security nodes.



Focus Tab, User Screen

The **Spell Check** tab of the **User** screen is controlled by this security node:

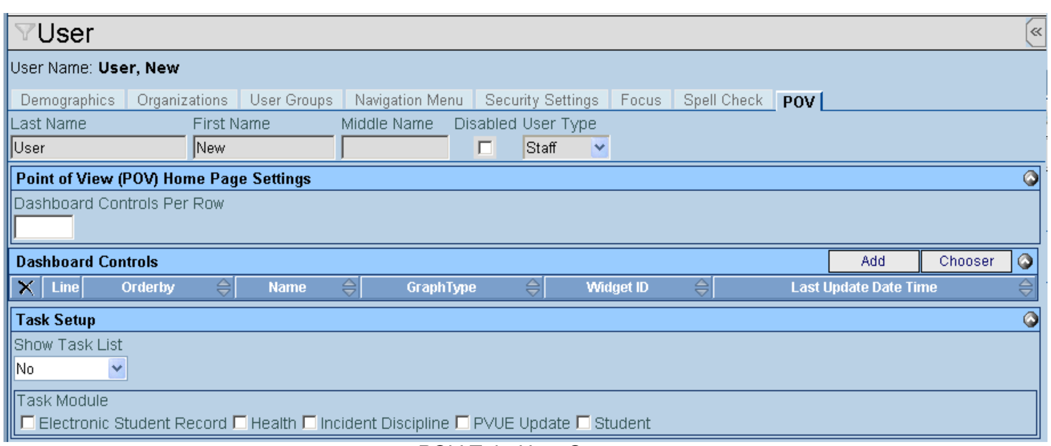
Revelation.UserInfo.RevUserCustomDict



Spell Check Tab, User Screen

The **POV** tab of the **User** screen is controlled by these security nodes;

- **K12.SystemInfo.SISUser** controls the **Dashboard Controls Per Row** field and the **Show Task List** list. This node also controls the **Demographics** tab and some of the **Organizations** tab.
- **Revelation.UserInfo.RevUserTaskLst** controls the **Task Module** section.
- **Revelation.UserInfo.UserDashboardWidget** controls the **Dashboard Controls** grid.



POV Tab, User Screen

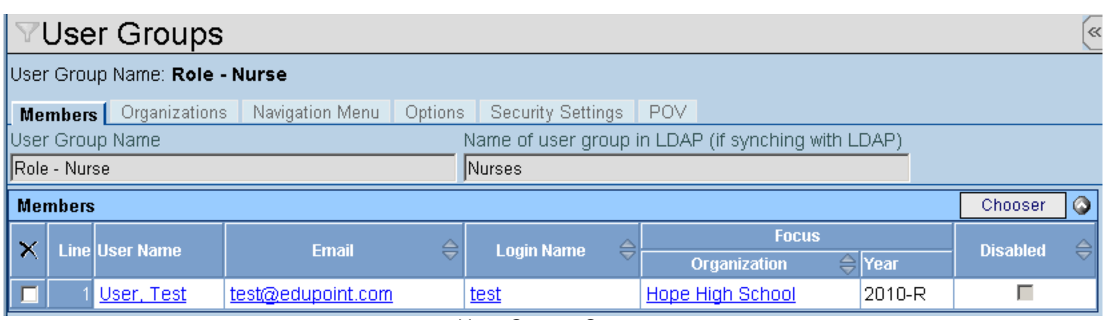
The following security nodes do not provide a visible change in security on the **User** screen:

- K12.Setup.UserFindList
- K12.Setup.UserFindSelect
- K12.SystemInfo.UserPasswordUI
- K12.SystemInfo.UserPreferencesUI
- Revelation.UserInfo.RevUser
- Revelation.UserInfo.RevUserNoDefault
- Revelation.UserInfo.RevUserPassword
- Revelation.UserInfo.RevUserPerformance
- Revelation.UserInfo.RevUserReportPreferences
- Revelation.UserInfo.RevUserUI
- Revelation.Navigation.MenuTree
- Revelation.Navigation.MenuUsrTree
- Revelation.Navigation.MenuGroup
- Revelation.Navigation.MenuGroupItem
- Revelation.Navigation.MenuGroupUsr
- Revelation.Navigation.MenuGroupUsrItem
- Revelation.OrganizationInfo.UserFocusConfig

USER GROUPS SECURITY

The **Members** tab of **Synergy SIS > System > User > User Groups** is controlled by these security nodes:

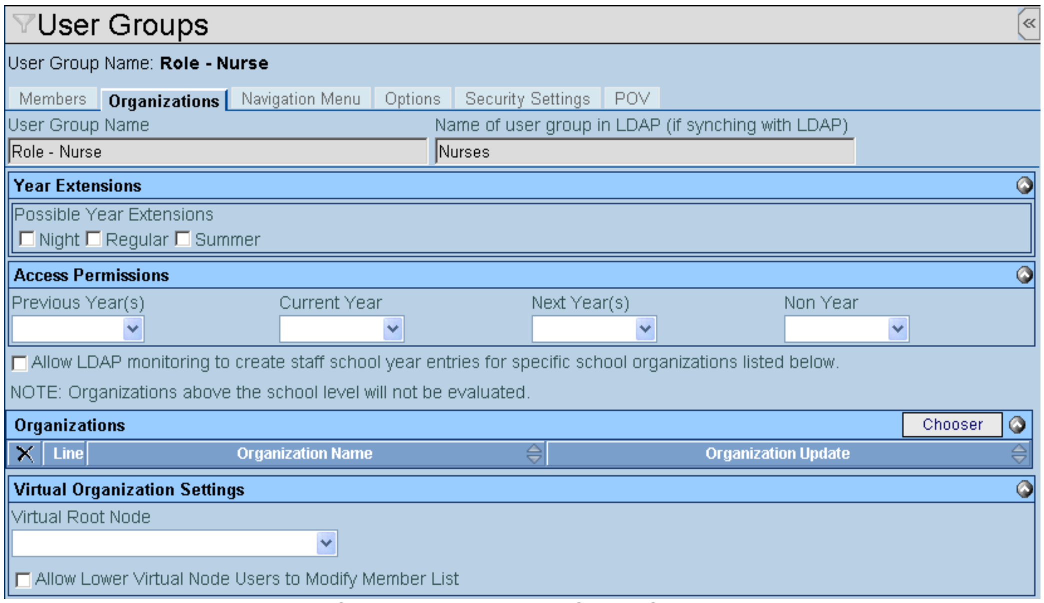
- **K12.SystemInfo.SISUserGroup** controls the **User Group Name**. This security node also controls part of the **Organizations** tab, the **Options** tab, and part of the **POV** tab.
- **K12.SystemInfo.SISUserGroupUser** controls the **Members** grid.



User Groups Screen

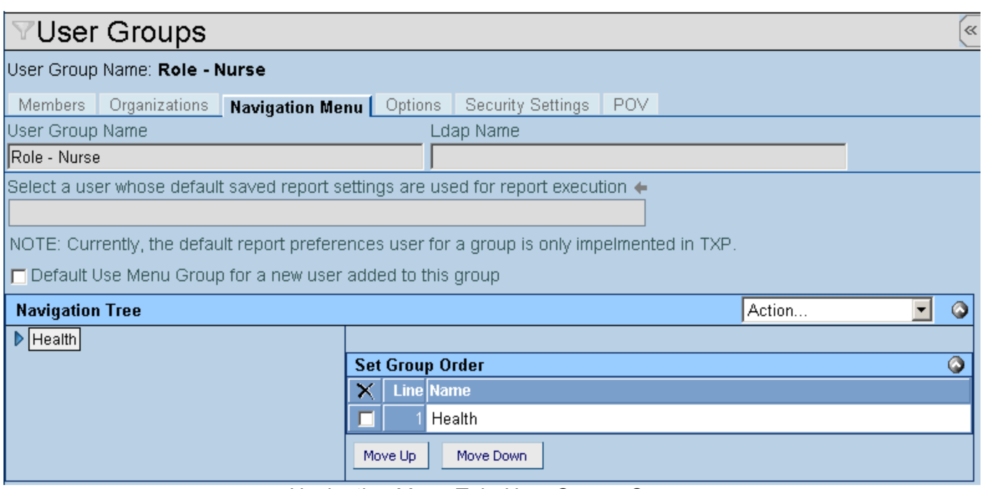
The **Organizations** tab is controlled by these security nodes:

- **Revelation.UserInfo.RevUserGroupExtLst** controls the **Year Extensions** section.
- **K12.SystemInfo.SISUserGroup** controls the **Access Permissions** section and the **Virtual Organization Settings** section.
- **Revelation.UserInfo.RevUserGroupOrganization** controls the **Organizations** grid.



Organizations Tab, User Groups Screen

The **Navigation Menu** tab is not controlled by any security node.

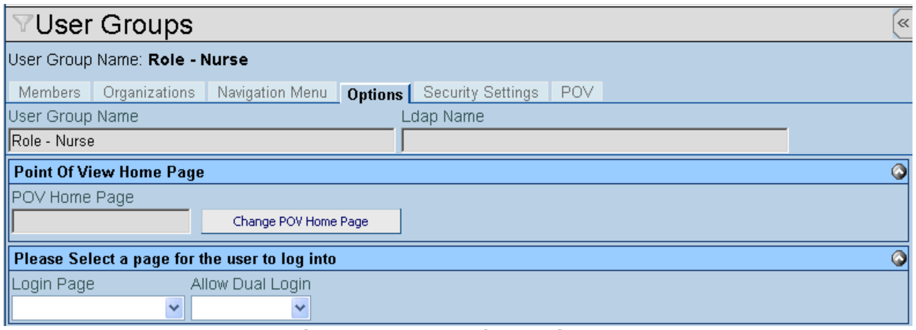


Navigation Menu Tab, User Groups Screen

The **Options** tab is controlled by this security node:

K12.SystemInfo.SISUserGroup

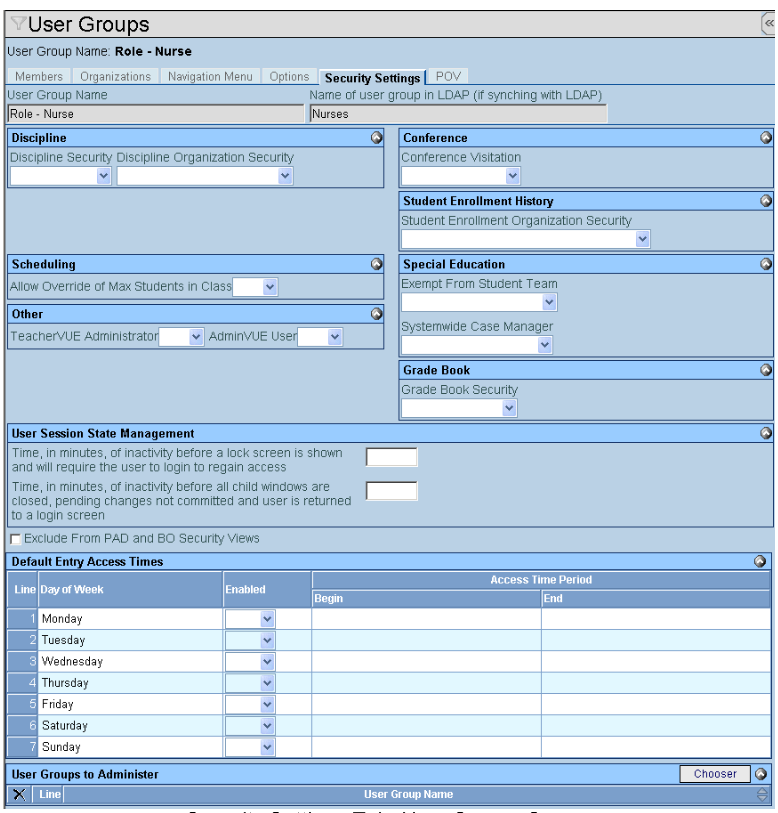
This security node also controls the group name, a section on the **Organizations** tab, and part of the **POV** tab.



Options Tab, User Groups Screen

The **Security Settings** tab is controlled by these security nodes:

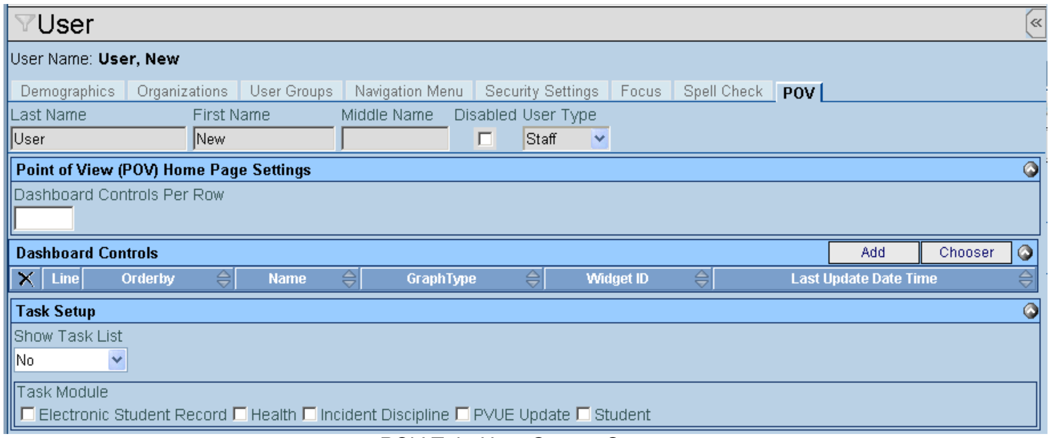
- **K12.SystemInfo.UserGroup** controls everything but the **Default Entry Access Times** grid.
- **Revelation.UserInfo.GroupUserAccessGrid** controls the **Default Entry Access Times** grid.



Security Settings Tab, User Groups Screen

The **POV** tab screen is controlled by these security nodes:

- **K12.SystemInfo.SISUserGroup** controls everything but the **Task Module** section. This node also controls the group name, a section on the **Organizations** tab, and the **Options** tab.
- **Revelation.UserInfo.RevUserGroupTaskLst** controls the **Task Module** section.



POV Tab, User Groups Screen

The following security nodes do not provide a visible change in security on the **User Groups** screen:

- K12.SystemInfo.MassChangeUserGroup
- Revelation.UserInfo.RevUserGroup
- Revelation.UserInfo.RevUserGroupUser
- Revelation.UserInfo.RevUserUserGroup

SYSTEM REPORTS SECURITY

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