SYNERGY®

Workflow
Administrator and User Guide

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

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ABOUT THIS GUIDE

Document History

Date	Volume	Edition	Revision	Content
July 2013	1	1	1	Initial release

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.

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

BEFORE YOU BEGIN

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

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

Chapter One: OVERVIEW

This chapter covers

- ► Overview of Synergy Workflow

OVERVIEW OF SYNERGY WORKFLOW

Synergy workflows enable you to manage and monitor complex processes as single unit within Synergy SIS and Synergy SE. One use is ensuring compliance with state, federal, or district regulations.

Workflows involve three screens:

- The **Workflow Definition** screen, where workflows are created and managed.
- The **School Workflow** screen, where school-wide processes are initiated, acted upon, and tracked. These processes are school-wide functions such as-New Year Rollover, state reporting, federal reporting, and grading cycle, including report card processes
- The **Student Workflow** screen, where individual student processes are handled. These are functions linked to individual students, such as student withdrawal, student discipline, special education, and student conferencing.

These screens are all in the Synergy SIS navigation tree (also known as the PAD tree) at **Synergy SIS > System > Workflow**.

Tip: Edupoint provides several special education workflows designed for districts in your state to help with reporting requirements.

Chapter Two: WORKFLOW SETUP

This chapter covers:

- ► Workflow Setup
- ► Workflow Elements

WORKFLOW SETUP

It is helpful to look at setting up a workflow as involving two phases:

- Establishing the name, accessibility, and other properties of the workflow's container
- Establishing the activities, resources, dependencies, and decision points that make up the process within the workflow

To set up a workflow's container:

1. Navigate to **Synergy SIS > System > Workflow > Workflow Definition**.
2. Click the **Add** button.

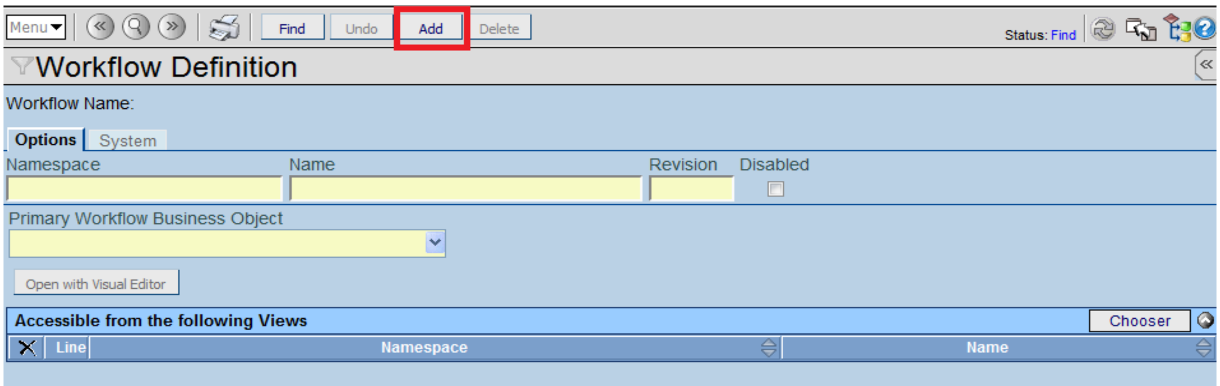

Figure 2-1 – Workflow Definition screen Add button

3. In the **Namespace** box, indicate where the step will originate, such as **K12**.

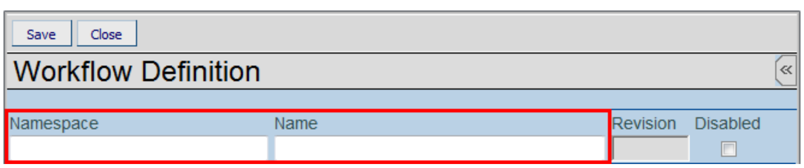

Figure 2-2 – Workflow Definition add screen

4. In the **Name** box, enter a descriptive name for the workflow, such as **Student Conference**.
5. Only if you want the workflow to be unavailable initially, check the **Disabled** box.
6. Click **Save**.
   The new workflow is displayed on the **Workflow Definition** screen.

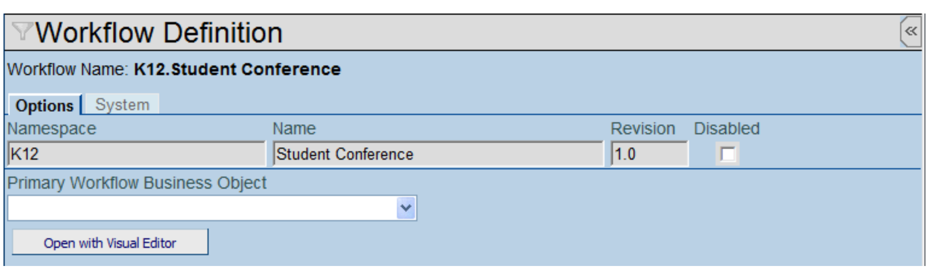

Figure 2-3 – Workflow Definition screen with new workflow

7. In the **Primary Workflow Business Object** list, click **K12.School** for a school workflow or **K12.Student** for a student workflow.

8. In the **Accessible from the following Views** section, click **Chooser** to find and select screens from which users will have access to the workflow.

> **Notes:** For information about how to access workflows from the screens chosen here, see Using Screens to Access Workflows on page 18.
>
> All school workflows and student workflows are accessible from the **School Workflow** and **Student Workflow** screens, respectively.

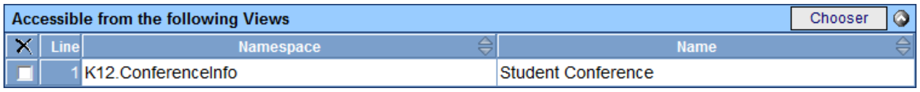

Figure 2-4 – Accessible from the following Views section

9. Click **Save**.

> **Note:** Workflows created by a user with a particular Role are accessible by users with the same Role association. Also, only the user who creates a workflow can edit that workflow.

To set up the process within the workflow:

1. Click **Open with Visual Editor**.

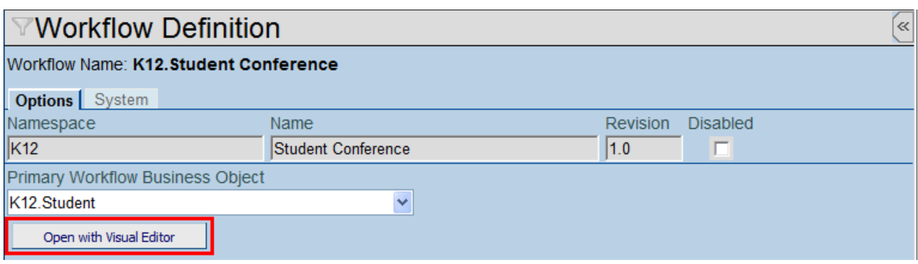

Figure 2-5 – Open with Visual Editor button

2. Insert and organize workflow elements.
   See Workflow Elements later in this chapter for descriptions of the elements.

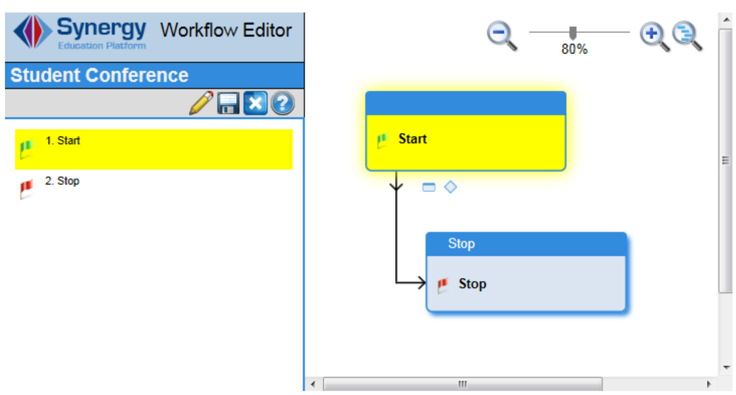

Figure 2-6 – Workflow Editor

3. Click the Save icon.

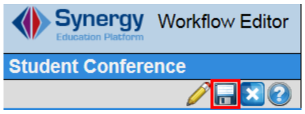

Figure 2-7 – Workflow Editor Save icon

WORKFLOW ELEMENTS

An element in a workflow can be an Activity, Option, External Task, or Decision.

Activities are such things as providing information on screens. Example: Filling in information for state reporting.

Decisions are branches in the process, where different situations lead in different directions.

Options are points at which a decision has been made and where a link may be established for the next step. They are only available for creation from already established **Decisions**.

External Tasks are actions that are outside the workflow process but are necessary for completion of the workflow.

When a workflow is created, the default elements are **Start** and **Stop**.

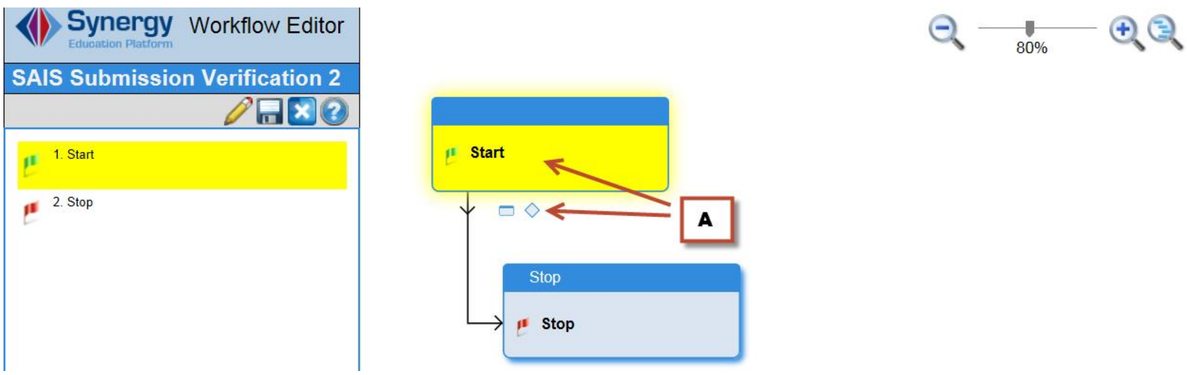

Figure 2-8 – Workflow Editor with Start and Stop

If you hover over the **Start** box, two icons appear below it (**A**). Click the rectangle to create an Activity. Click the diamond to create a Decision. In general, icons that appear below a workflow element enable you to add other elements.

Creating an Activity

1. Click the Insert Activity rectangle.

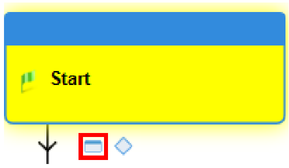

Figure 2-9 – Insert Activity icon

2. On the **Insert Activity** screen, provide information about the activity.

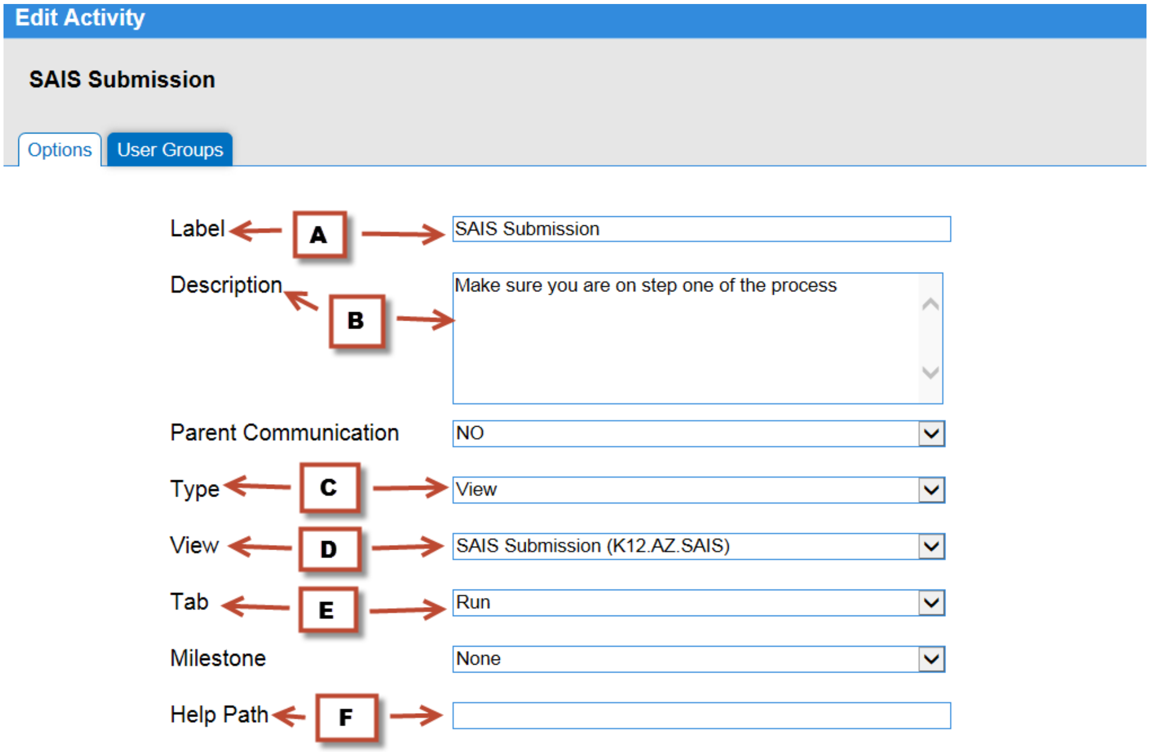

Figure 2-10 – Edit Activity (also Insert Activity) screen

A. The **Label** describes the activity step.
B. The **Description** gives helpful details about the Activity step.
C. The **Type** can be such things as an external task, a meeting of people concerned with the Activity, a report to be generated, or a view (screen) that relates to the Activity. Other fields can appear, depending on your selection for **Type**.
D. **View** is an example of a field that appears because of your selection (**View**) in the **Type** list. Your selection here can again cause another field to appear.
E. **Tab** is an example of a field that appears because of your selection in another list (in this case, the **View** list).
F. The **Help Path** is a path to a document or web site where you provide help for the user.

3. Click **Ok**.

Note: Depending on its **Type**, an Activity can appear in the Workflow Editor as a rectangle or a parallelogram.

Adding a Decision

1. Click the Insert Decision diamond below an activity.

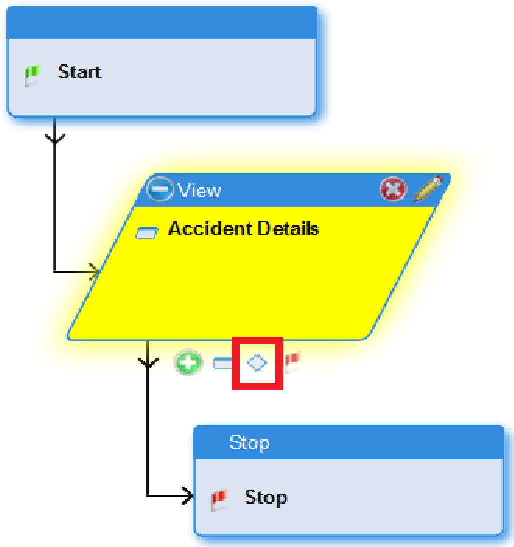

Figure 2-11 – Decision diamond

2. Name and describe the decision to be made.

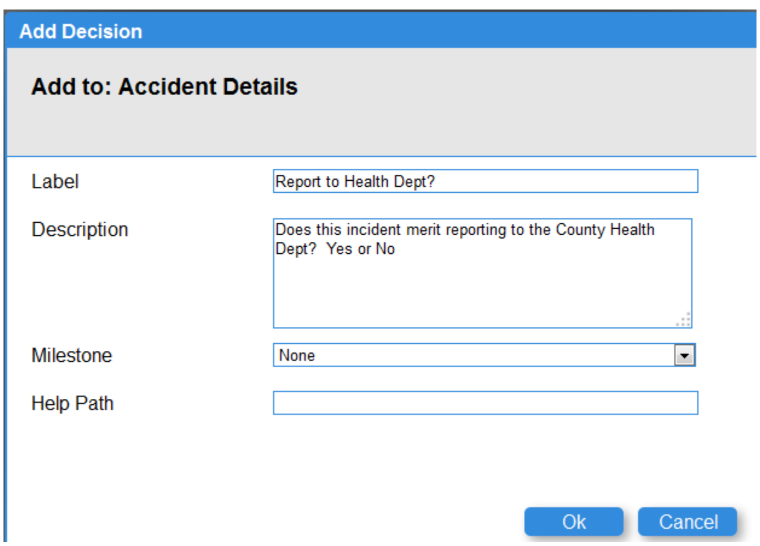

Figure 2.10 – Add Decision screen

3. Click **Ok**.

A decision and one option that can result from the decision are added.

Creating an Option

1. On a Decision box, click the Add Option icon (**A**).

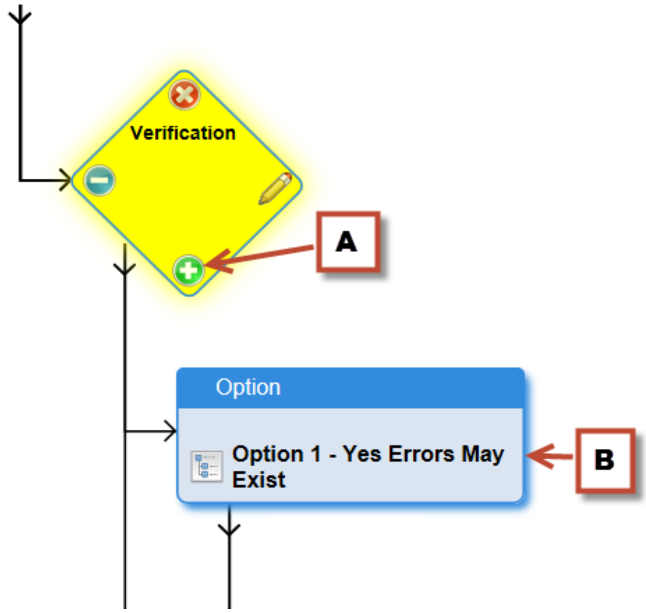

Figure 2-12 – Decision option

Note the Option (**B**) and the arrow leading to the next element that follows from this option.

2. Type a **Label** for the Option, and click **Ok**.

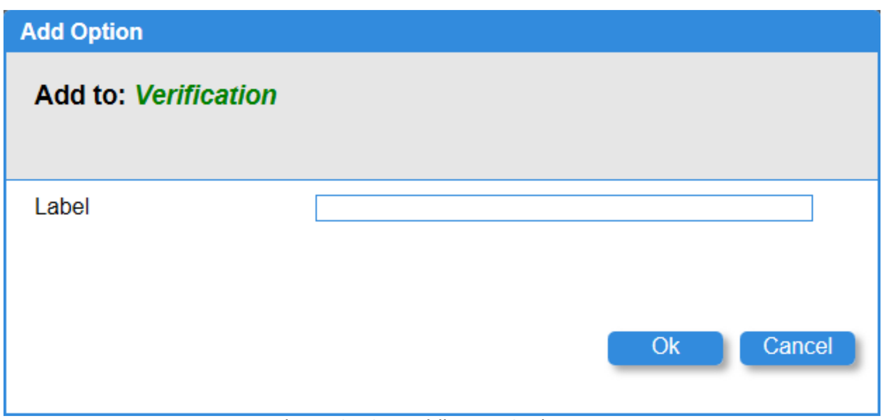

Figure 2-13 – Adding an Option

Note: Workflows do not require Decisions and Options. Some workflows might require only Activities or External Tasks to bring them to successful conclusions.

Expanding Options

Figure 2-14 shows an Option (**A**) linked to an External Task (**B**). The other Option links to the end of the workflow (**C**).

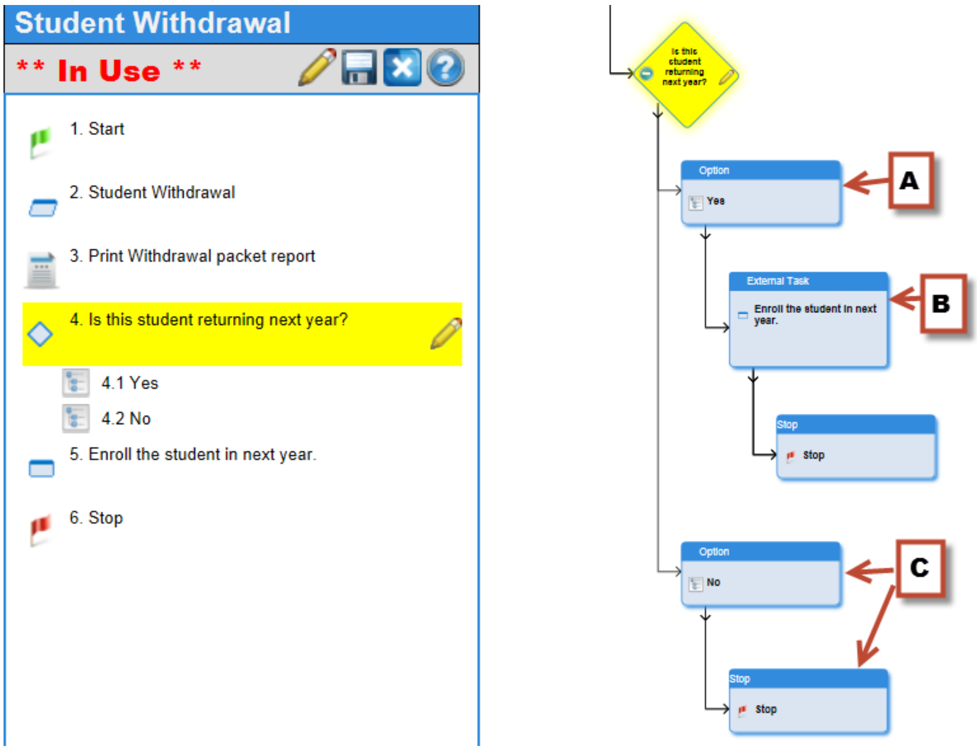

Figure 2-14 – External Task as part of an Option

> **Note:** External Tasks are not necessarily external to Synergy. They may simply be outside the scope of the current workflow process.

Creating multiple decision paths

Figure 2-15 shows an Activity (**A**) that leads to a somewhat complicated set of elements.

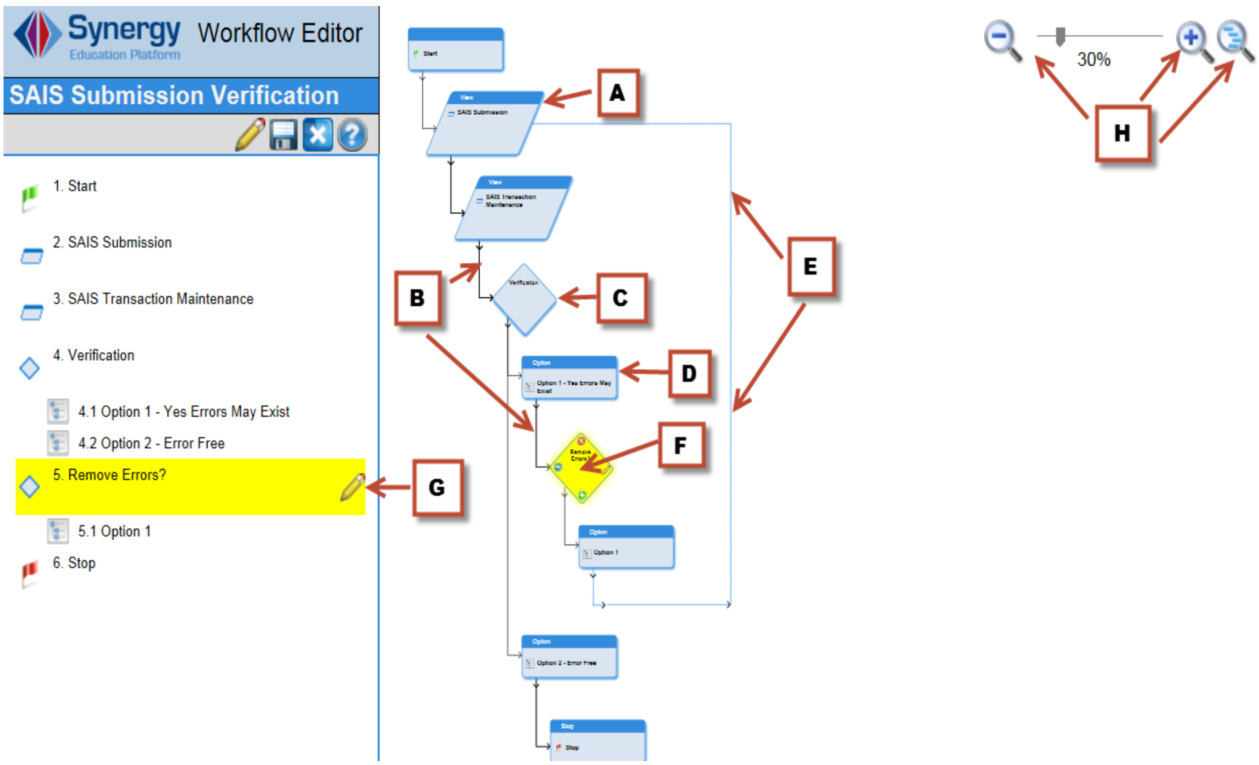

Figure 2-15 – Complex workflow with nested Decisions

The workflow is tracked by dotted lines (**B**) connecting the steps.

One Decision (**C**) has two Options; the first of those (**D**) links to a second Option (**F**). This second Option returns (**E**) to a previous Activity to correct something before the workflow can end.

On a Decision, you can click a red X to remove a step, a pencil to edit a step, a green dash to toggle or change a link, or a green plus sign to add an Option step.

You can edit a workflow in the list view (**G**) rather than in the flowchart view. You can enlarge or shrink the flowchart using the Zoom and Overview controls (**H**).

Chapter Three: USING WORKFLOW

This chapter covers:

- ► Using Screens to Access Workflows
- ► Using Student or School Workflow
- ► Importing and Exporting Workflows
- ► Workflow Reminders
- ► Workflow Definition System Tab

USING SCREENS TO ACCESS WORKFLOWS

Users can access a workflow from various screens if the following conditions are met:

- The creator of the workflow added the screen to the **Accessible from the following Views** grid, as described in the Workflow Setup section in Chapter Two.
- The users have the same Role as the creator of the workflow.

Figure 3-1 shows the **Student** screen as an example.

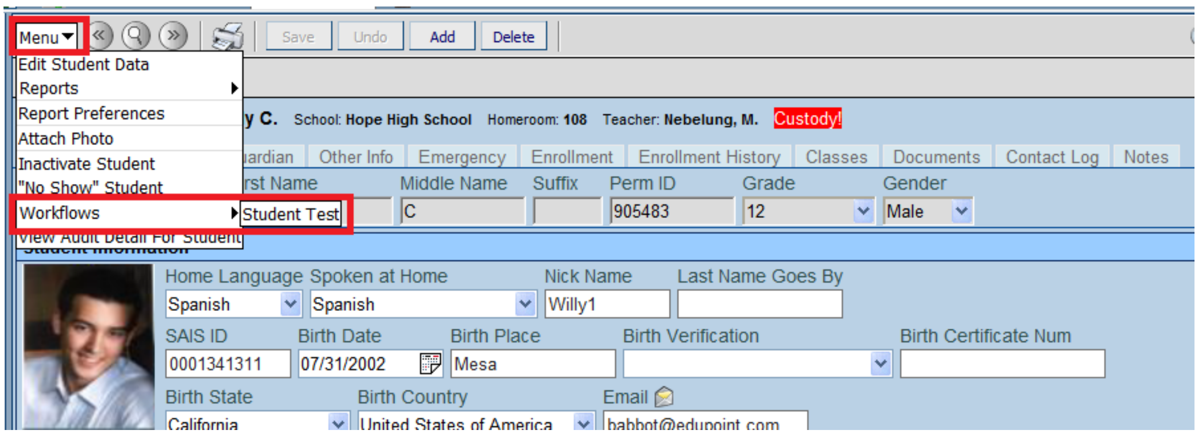

Figure 3-1 – Accessing a workflow from the Student screen

To run a workflow from this screen:

1. Click **Menu**, point to **Workflows**, and click the name of the workflow.
2. Click **Initiate Workflow**.

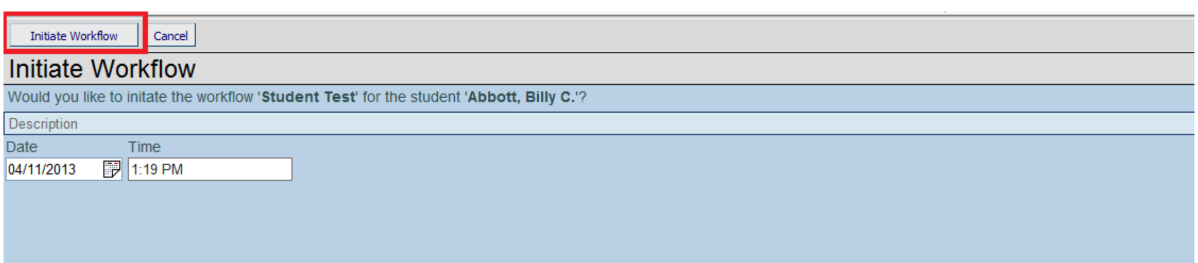

Figure 3-2 – Initiate Workflow

Steps in the workflow are displayed in order (**A**). Only those steps up to the first Decision are displayed, so that the user cannot skip steps.

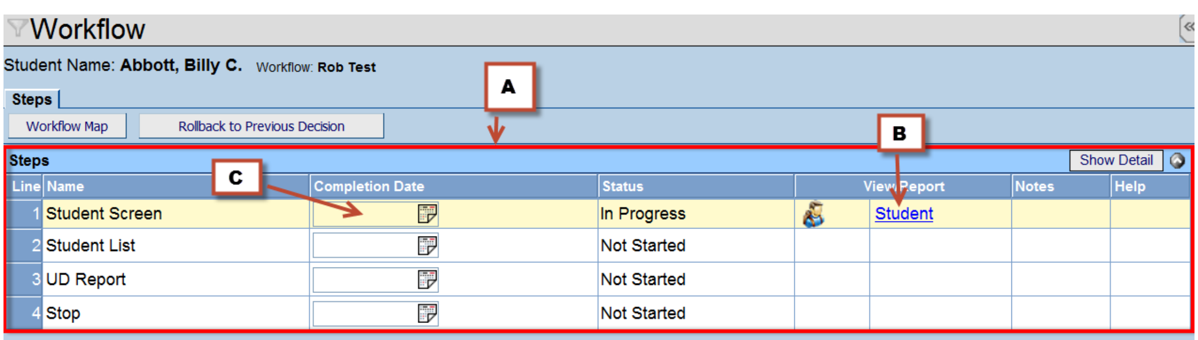

Figure 3-3 – Workflow screen

3. Click links (**B**) to screens or reports, as needed, to perform required actions.
4. Enter the date (**C**) and continue to the next step, if desired.

Rolling back a decision

If a Decision point has not been passed, you can back up in the process and fix errors.

1. Select a step, and click the **Rollback to Previous Decision** button (**A**).

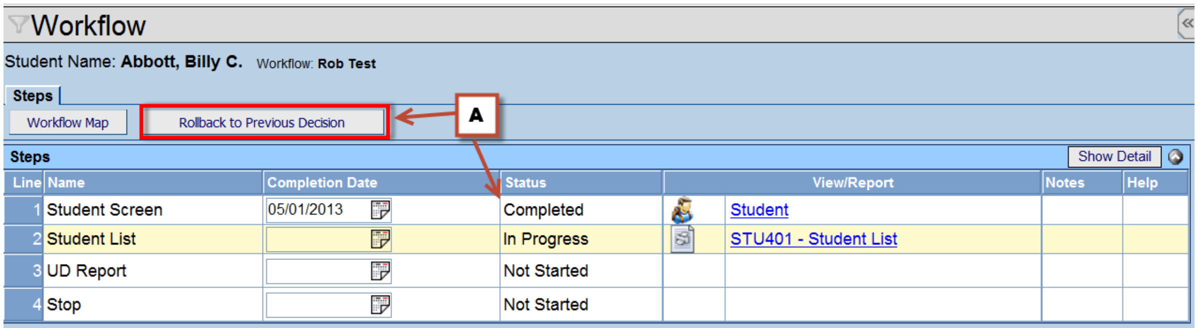

Figure 3-4 – Rollback to Previous Decision

2. Click **Rollback to Previous Decision**, and click **OK**.

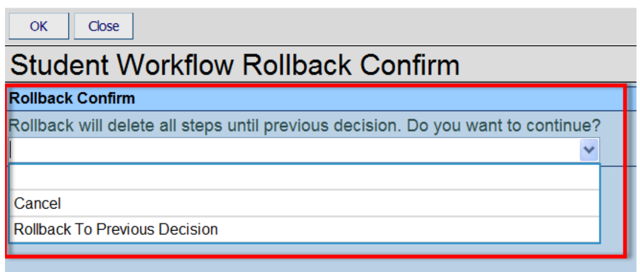

Figure 3-5 – Rollback Confirm

Workflow Step Details

You can see the details of a step in the workflow process by clicking a line number and clicking the **Show Detail** button.

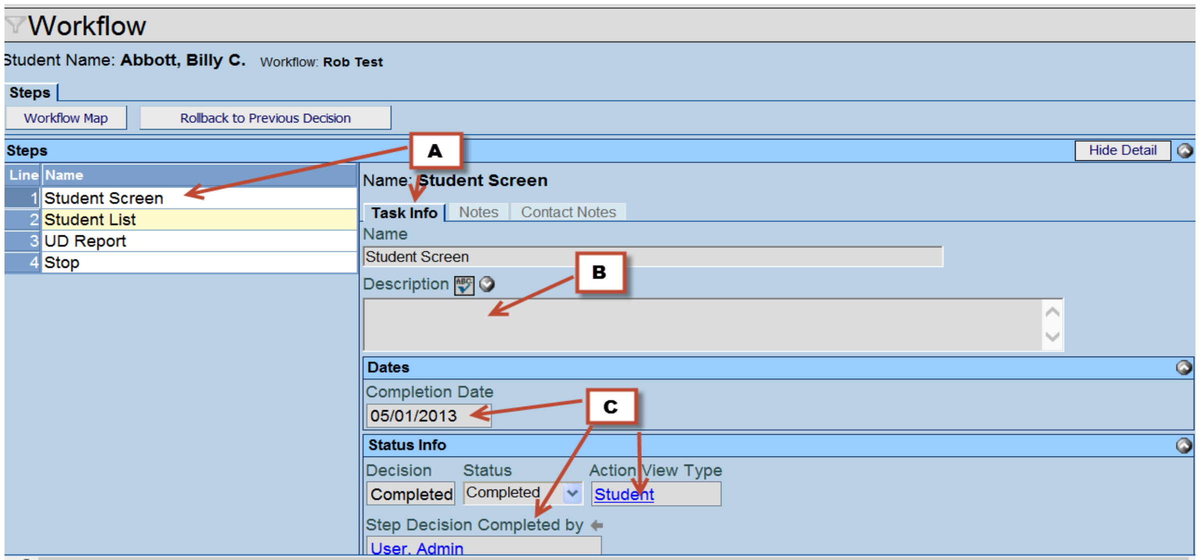

Figure 3-6 – Workflow details

A. Selected line and **Task** Info tab.
B. Description of the overall workflow, from the **Workflow Definition** screen. Only the creator of the workflow can edit this description.
C. Progress made on this step.

Compliance and Contact Notes (Comments)

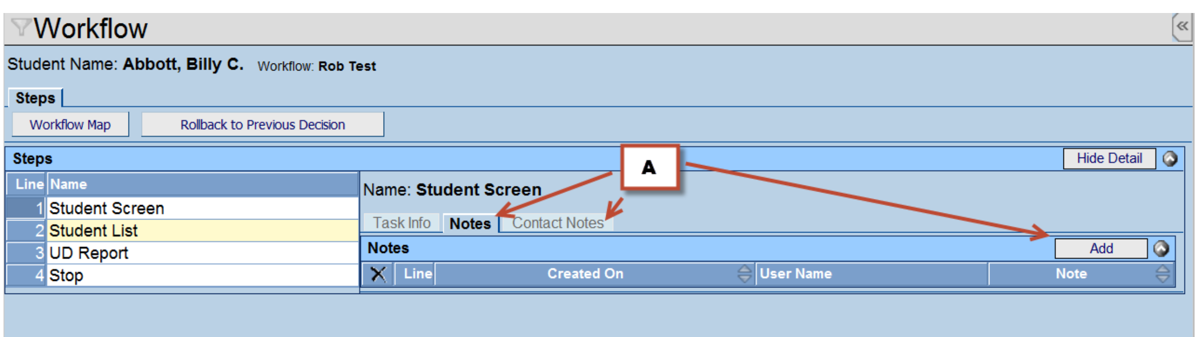

Figure 3.7 - Workflow Notes

A. You can add compliance notes and contact notes on the **Notes** and **Contact Notes** tabs by clicking the **Add** button. These notes are for the particular step and student or school. These notes are intended primarily for special education, but you can use them for any workflow.

USING STUDENT OR SCHOOL WORKFLOW

You can start a workflow from **Synergy SIS > System > Workflow > Student Workflow** or **Synergy SIS > System > Workflow > School Workflow**. The process is the same as when you start from another screen as described earlier in this chapter.

IMPORTING AND EXPORTING WORKFLOWS

Synergy users on different systems can share workflows by exporting and then importing them.

To export:

1. On the **Workflow Definition** screen, click **Menu**, point to **Utilities**, and click **Export Workflow**.

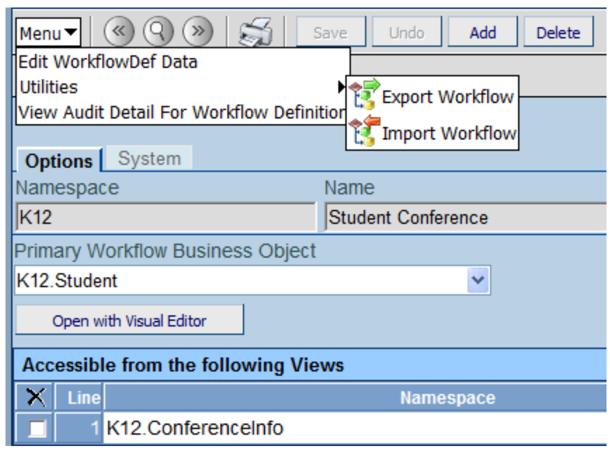

Figure 3-7 – Exporting a Workflow

2. In the box that opens, click **Save**.
   Synergy saves the workflow as a file that you can give to another user.

To import:

1. On the **Workflow Definition** screen, click **Menu**, point to **Utilities**, and click **Import Workflow**.
2. Locate and select the workflow file, and click **Upload**.

WORKFLOW REMINDERS

You can set up task and email reminders for workflows that you initiate.

1. Navigate to **Synergy SIS > System > Task Definition**.
2. On the lines for **Student Workflow** and **School Workflow**, check boxes in the **Enabled** column to see tasks on your home page, and in the **Email** column to receive email.

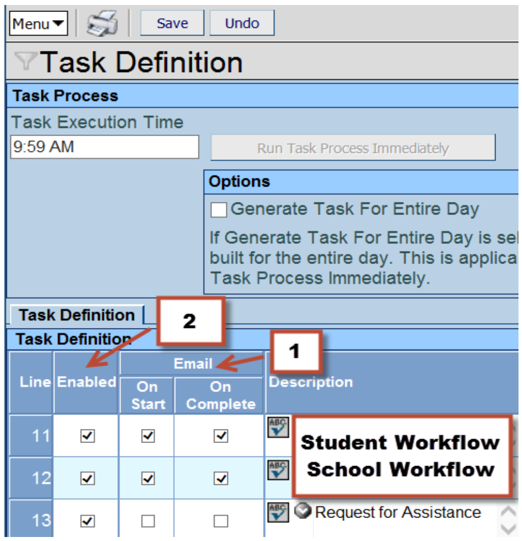

Figure 3-8 – Task Definition

3. For tasks, navigate to **Synergy SIS > System > User > User** (or **User Groups**), Find or scroll to the appropriate user or group, click the **POV** tab, and check the boxes for **School Workflow** and **Student Workflow**.

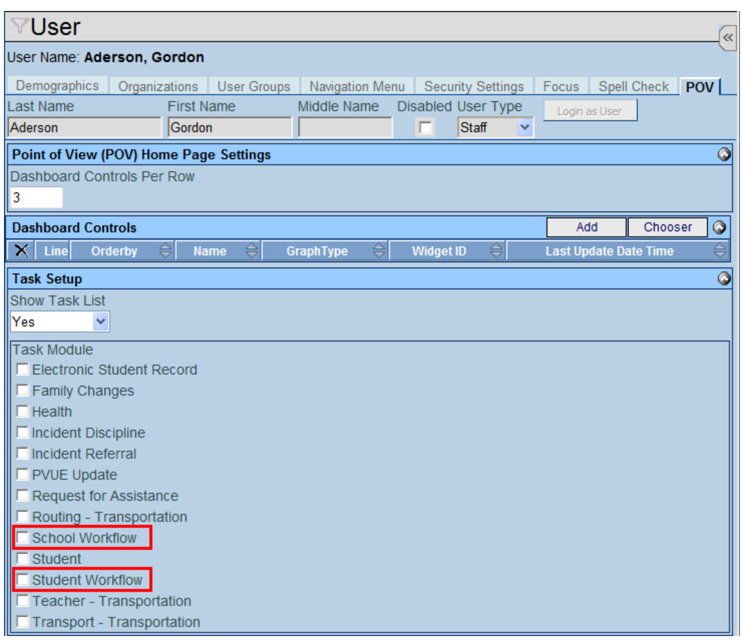

Figure 3-9 – POV tab, workflow check boxes

WORKFLOW DEFINITION SYSTEM TAB

The **System** tab of the **Workflow Definition** screen contains information that is primarily for use in troubleshooting by Edupoint personnel. It includes the XML on which the display in the Visual Editor is based.

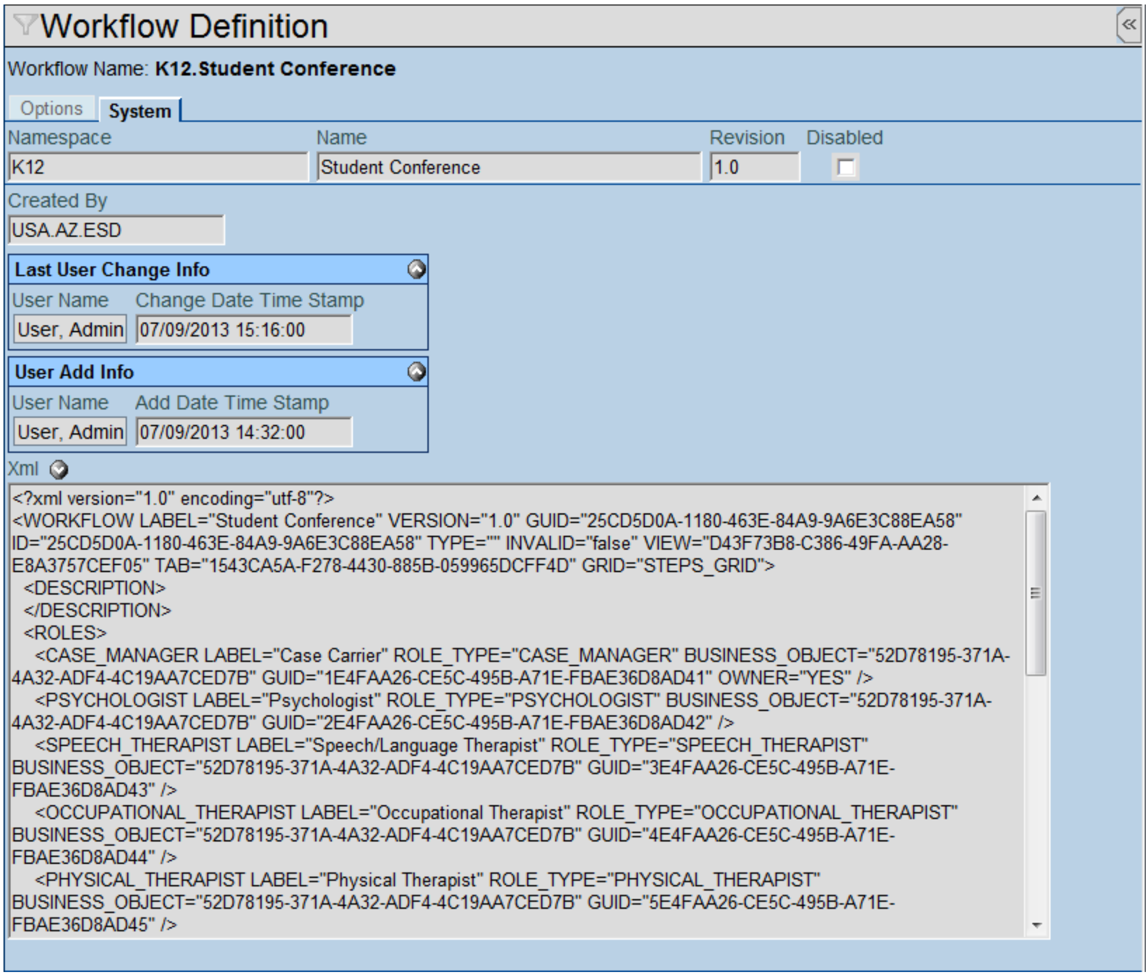

Figure 3-10 – Workflow Definition screen, System tab

Caution: Copy and paste of the XML text is not a viable alternative to exporting and importing workflows.

INDEX OF SCREENS