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Synergy® SIS

Locker Training Module

October 2015

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Contents

Course Description

In this training course, you will learn how to manage lockers at the district, school and student levels.

Expected Outcomes

After completing this course participants will be able to:

- Locate a School Locker
- Add New Locker Records
- Assign Combinations to Lockers
- Assign Student Restrictions to Lockers
- Assign a Locker to a Student
- View a Student's Locker Assignment
- Create Locker Student Groups
- Assign Lockers by Section, Students, or Student Groups
- Clear Locker Assignments
- Generate Locker Reports

Course Prerequisites

Participants should have the following:

- Log-in Credentials
- Understanding of basic Synergy navigation
- Synergy Update or View security rights

Managing Lockers

For each locker, the district may record multiple combination numbers, the locker location information, and track the students assigned to the locker.

Locker assignments from the previous school year may be retained by making the appropriate selection during the **New Year Rollover Setup process.**

Locating a Locker

Go to **Synergy SIS > Locker > Locker**

The **Locker** screen displays the access, location and restriction information of each school locker. It also shows the student(s) assigned to the locker for the current school year.
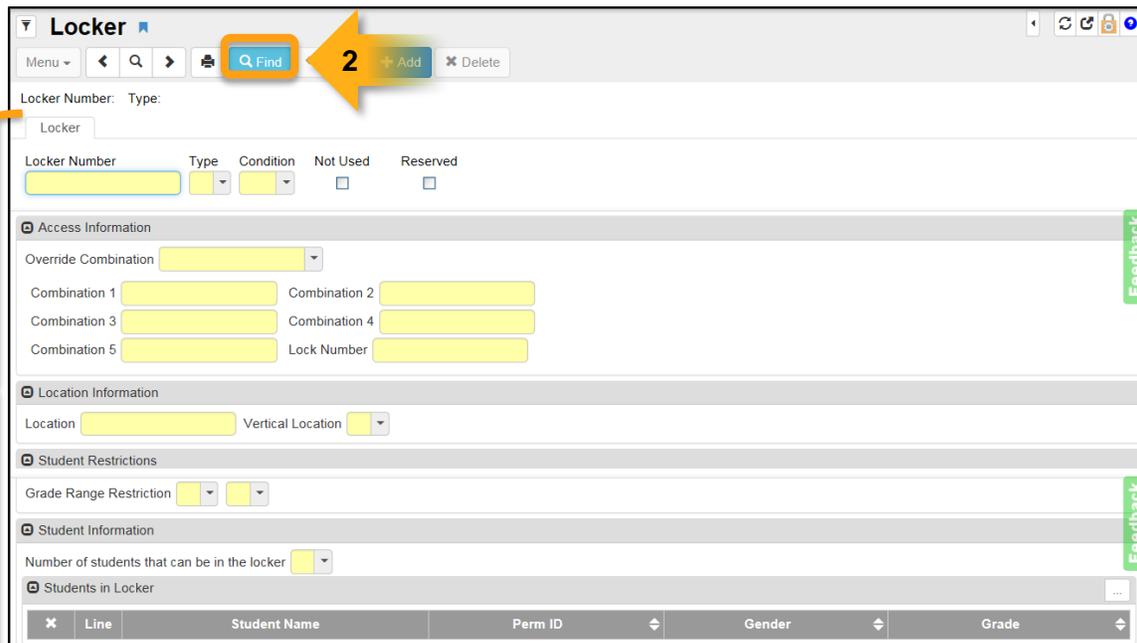
To view all the lockers that have been established at your school:

1. Perform a search using any of the fields highlighted in yellow on this screen, OR
2. Click the **Find** button to display all records.
3. A query runs that displays a list of the existing locker numbers (below). The **Output Type** is defaulted to a *PDF file* in case you want to print this list.

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Adding a New Locker Record

1. On the **Locker** screen click the **Add** button.

2. The **Locker** window displays. Enter a **Locker Number** (mandatory).
3. Select the locker **Type** and **Condition** from the drop-down menus.
4. Click the **Save** button. You are returned to the **Locker** screen and the new locker record is added.

Entering Locker Information
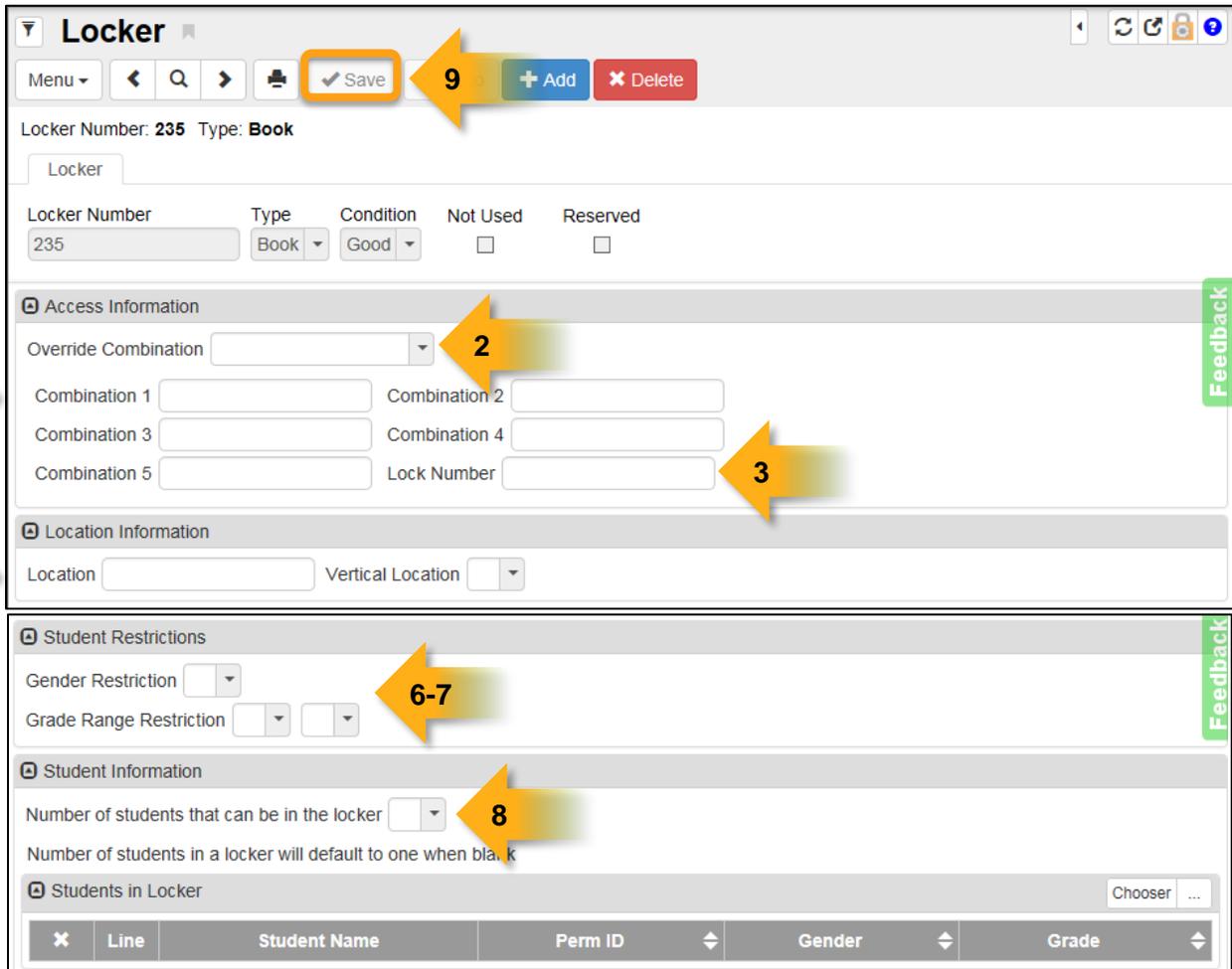
To assign *Combinations* to your new locker:

1. In the **Access Information** group box, enter a combination in the **Combination 1** field. Leave the other combination fields blank if your school does not use multiple combination codes.
2. Select **Combination 1** from the **Override Combination** drop-down menu. This field determines which combination (Combination 1 – 5) to use to open the locker, and this option supersedes all others. **Note:** Be sure to select a field that has a combination code and be sure to complete this field.
3. If a padlock is used and has a combination associated with it, enter the padlock's serial number in the **Lock Number** field.

Note: A school-wide default locker combination may be designated during the **School Setup process**.

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To assign *Location Information*:

4. In the **Location Information** group box, enter a location description in the **Location** field.
5. Select a value from the **Vertical Location** drop down menu.
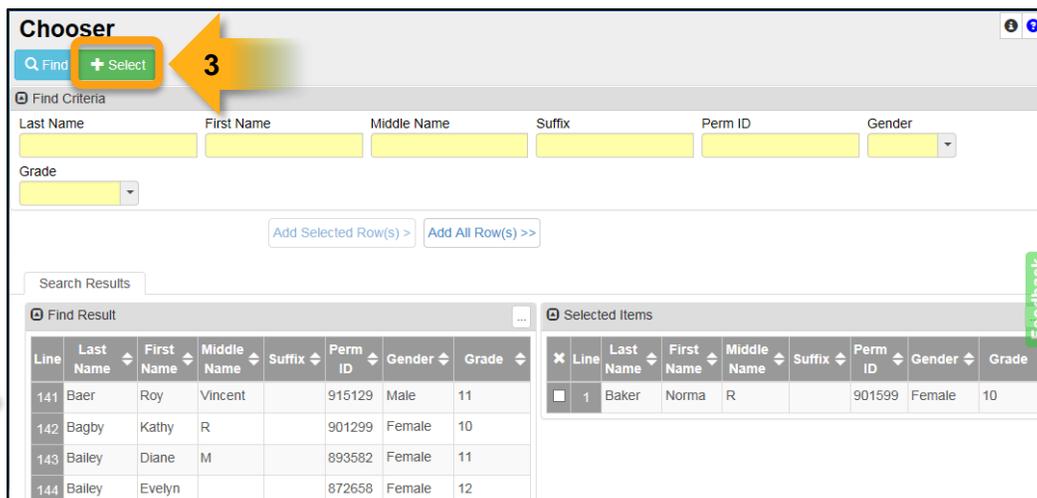
To assign *Student Restrictions:*

6. To assign gender restrictions, in the **Student Restrictions** group box select a value from the **Gender Restriction** drop-down menu.
7. To assign a grade level restriction, select value(s) from the **Grade Range Restriction** field.
8. In the **Student Information** group box, select the **Number of Students** that may be assigned to the locker. (If left blank, the number defaults to one.)
9. Click the **Save** button to save all the above information added.

Assigning a Locker to a Student

To manually assign a locker to a student:
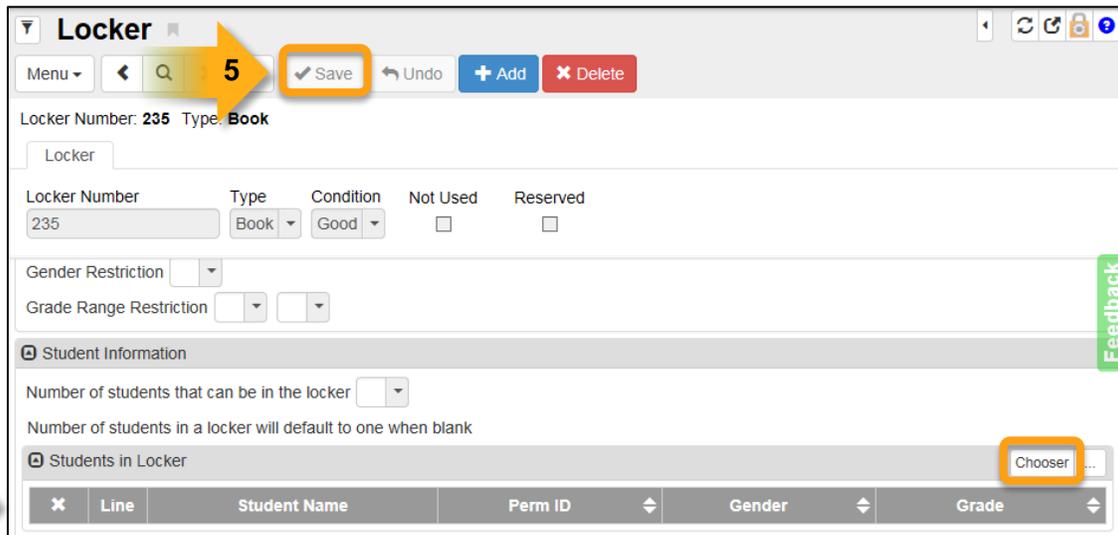
1. Click the **Chooser** button on the **Locker** screen.
2. On the **Chooser** screen (below), **Find** the desired student and double click on the line number to add the student to the Selected Items grid.
3. Click the **Select** button.

4. Once the student is selected, his/her name displays in the **Students in Locker** grid. Clicking the student's name opens their record in the **Student** screen.
5. Click the **Save** button at the top of the **Locker** screen.

Note: If you choose to manually assign a student to a locker using this **Locker** screen, the student restrictions that you may have set on **Locker Mass Assignment** screen will be overridden. Essentially, adding a student manually is like performing an administrative override, taking precedence over any previously assigned values.

Locating a Student's Locker

To quickly locate a student's locker:
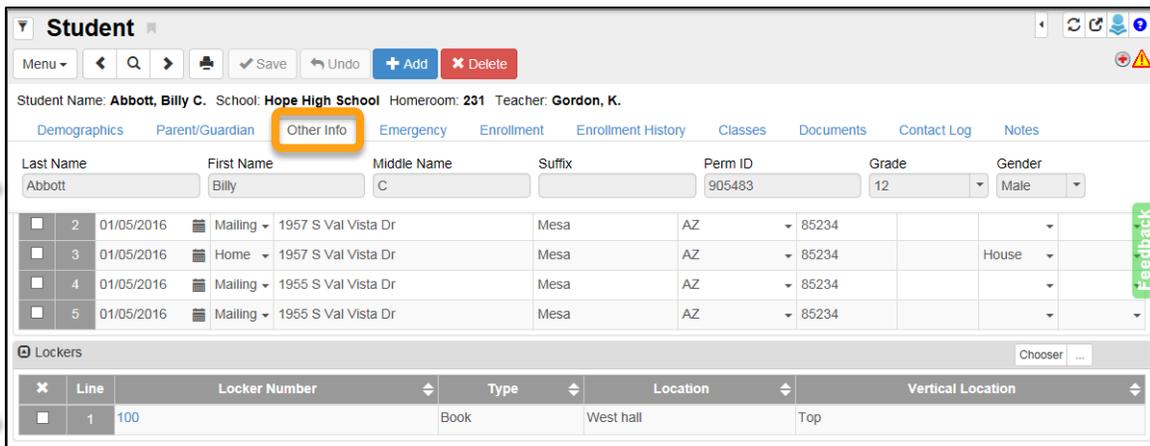
1. Go to the **Student** screen and view the student record.
2. On the **Other Info** tab at the very bottom, the locker number displays in the **Lockers** grid.

Note: Also on the **Other Info tab** of the **Student** screen there is a **Locker Number** field in the **School Information** group box. This field is not associated with the locker number we just assigned to this student using the **Locker** screen. This field was created to accommodate schools that may use their own locker numbering system and is not linked to Synergy's mass assignment locker system.

Mass Assigning Lockers

The **Locker Mass Assignment** screen is used to assign multiple lockers to multiple students at the same time, or to mass clear locker assignments. For example, one definition may assign lockers to seniors, another to incoming freshmen, and another definition clears the assignments at the end of the year. The lockers may be assigned by sections, students or groups.

Go to **Synergy SIS > Locker > Locker Mass Assignment**

Creating Locker Mass Assign Groups

For most schools, the first step in mass locker assignments is to create the student groups. A separate and specific definition can be created and used to assign lockers to certain groups. For example, a definition can be set to assign lockers to seniors, another to incoming freshmen, and another definition clears the assignments at the end of the year.

In this example, we will create a definition for all 12th grade students who do not already have a locker assignment.
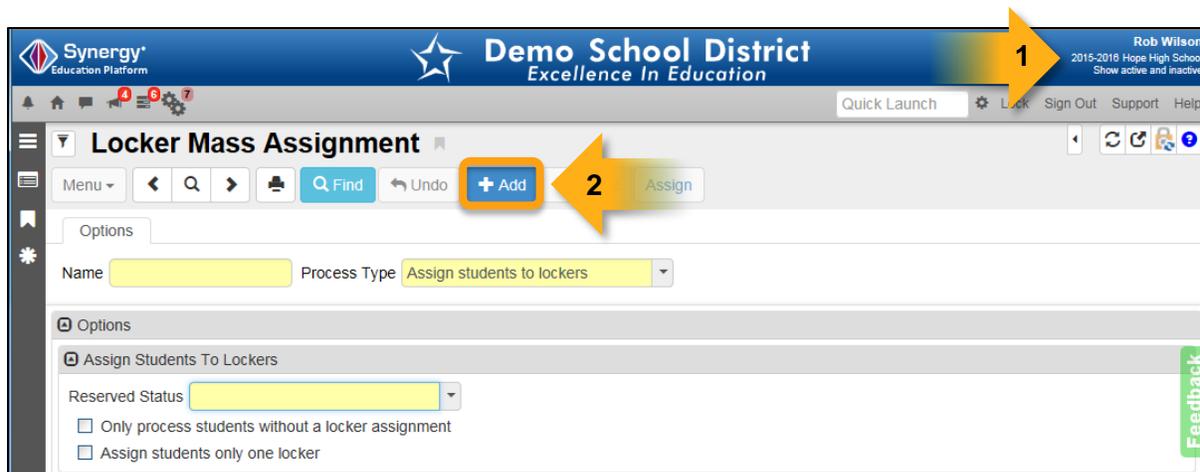
1. Verify that the focus year reflects the school year that you are actually working in.
2. To add a new mass assignment, click the **Add** button. The **Locker Mass Assignment** screen displays.
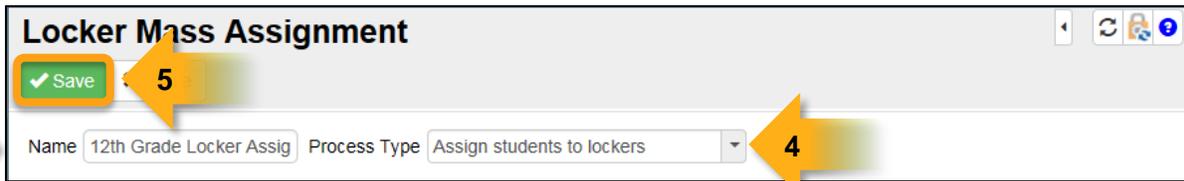
3. Enter the **Name** of the new assignment. The name should be based on a filter that you are going to use for the assignment process.
4. Select the **Process Type**. The choices are *Assign Students to Lockers* (default) or *Clear Locker Assignments.*
5. Click the **Save** button.

Once the new definition has been created, the criteria used to assign the lockers to the students needs to be set-up. (see next page)

6. Select a value from the **Reserved Status** drop-down menu. You have the choice of:
    a. **Don't use reserved lockers** = if some lockers are already reserved when you run the mass assignment, these lockers are not assigned to any students during the run
    b. **Use only reserved lockers** = if some lockers are already reserved and no students have been assigned to them individually using the **Locker** screen, students will be mass assigned to these lockers during this process run
    c. **Ignore reserved status** = no lockers will be skipped during the mass assignment process
    d. **Leave blank** = reserved lockers are not assigned.

Note: the *Reserved* locker property is set on the **Locker screen,** designating a locker as reserved or not, which directly impacts the overall mass assignment process depending on what is selected from this *Reserved Status* drop-down.

7. When assigning lockers to new students, or to prevent duplicate locker assignments for one student, check the box for **Only process students without a locker assignment.**
8. To prevent duplicate locker assignments for one student, check the box for **Assign students only one locker**. With this option, once a student has been assigned a locker, Synergy will not assign him/her another locker. Do not use this option, for example, if you also want to assign all of your 12th graders a P.E. locker. This would be done by adding a new definition, naming it *12th Grade PE Locker Assignments,* and then selecting *PE* from the **Locker Type** drop-down menu.

Note: Because Synergy doesn't know which students you want to assign to those reserved lockers, it is recommended that once you reserve a locker, you should proceed with assigning it to a student(s), and then tell the system to skip those particular lockers during the mass assignment run.

9. In the **Locker Assignment Order** group box, select to run the assignment in *Alpha A-Z, Alpha Z-A,* or a *Random* assignment from the **Student Order** drop-down menu. AND/OR
10. Use the **Locker Assignment Order** drop-down menu for grade levels: *Low to High, High to Low,* or *Random* assignment order. If these drop-downs are left blank, the system defaults to running by the first option in the lists.
11. The checkbox for **Treat Locker number as numeric** should be selected if locker numbers are *alphanumeric* and you prefer them to be treated as *numeric.*

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12. In the **Filters** group box, you may filter the mass locker assignment process by **Gender, Locker Number Range, Grade level, Locker Type** and/or **Counselor.**
    *In this example, we are assigning 12th graders to regular lockers, so we will select 12 from the **Grade** drop-down, and Book from the **Locker Type** drop-down.*
13. When you have finished making your selections, click the **Save** button.
14. To run the locker assignment process, click the **Assign** button.

Assigning Lockers by Section, Students or Student Groups

You can mass assign locker assignments based on Sections, Students or Groups by adding those items using the **Chooser** or **Add** button for each group box shown below. **Note**: Groups have been predetermined and setup by the district as **Student Groups**. **Ad Hoc** groups may not be used for locker assignments on the **Locker or Locker Mass Assignment** screens.

1. Click the **Chooser** or **Add** button for the type of group you wish to add.
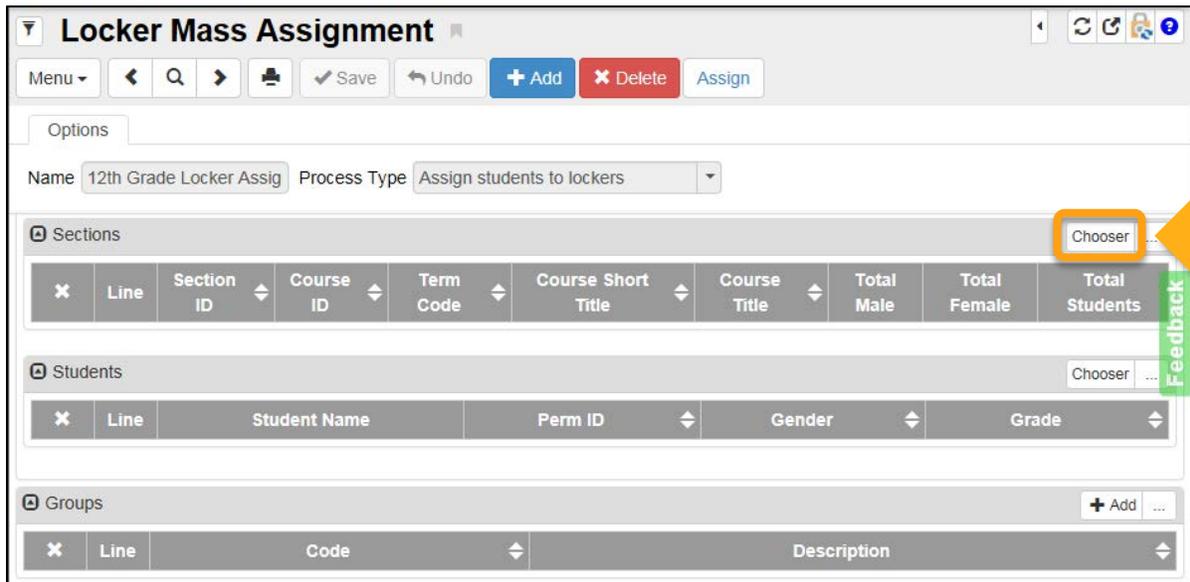
2. When the **Chooser** or **Add** screen displays, find and select the Sections OR the students OR the groups and click the **Select** button.

After making your selections, the name(s) of the sections, students or groups will display in the grid.

Sections

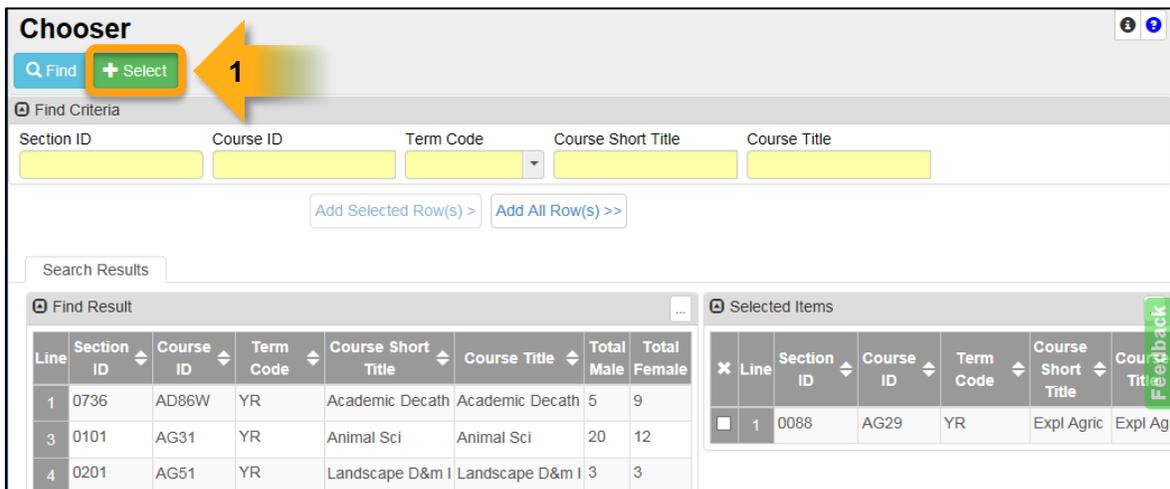| ✖	Line	Section ID	Course ID	Term Code	Course Short Title	Course Title	Total Male	Total Female	Total Students
☐	1	0310	CB20	S1	Web Page Design	Web Page Design	16	7	23
☐	2	0315	CB21	S1	Adv Web Page	Adv Web Page	2	0	2
☐	3	0510	CB18	S1	Desktop Publish	Desktop Publish	12	5	17

OR

Students

✖	Line	Student Name	Perm ID	Gender	Grade
☐	1	Bingham, Sandra D.	102827	Female	12
☐	2	Baker, Norma R.	901599	Female	10
☐	3	Araujo, Daniel J.	120700	Male	10

OR

Groups

✖	Line	Code	Description
☐	1	FOOT	Football
☐	2	BASE	Baseball
☐	3	BSK	Basketball

3. Continue making selections until the desired grid is complete.

4. Click the **Save** button.
5. Click the **Assign** button to complete the locker mass assignments process.
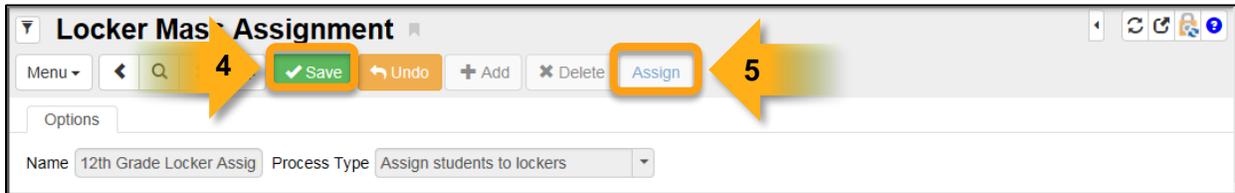
The Job Queue screen displays while the process is running. When it is complete, a message displays the results.
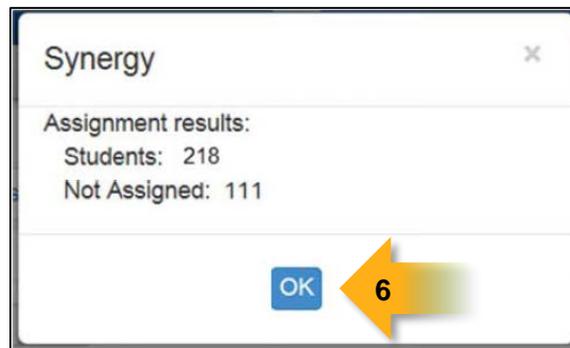
6. Click **OK.** The Job Results Files display on the **Job Result** screen:
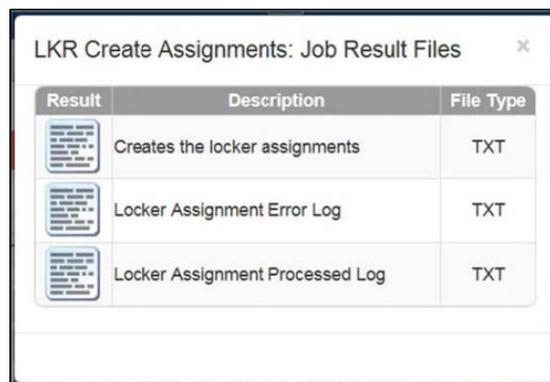
To view the details of the lockers that were not assigned, click the icon next to Locker Assignment Error Log. A text file displays with the details.
To view the details of the lockers that were assigned, click the icon next to Locker Assignment Processed Log. A text file displays with the details.

Note: Schools may create as many locker mass assignment definitions as needed. However, the definitions will need to be recreated for each school year.

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Clearing Locker Assignments

Clearing locker assignments is a process similar to assigning lockers to students.

1. Click **the Add** button.
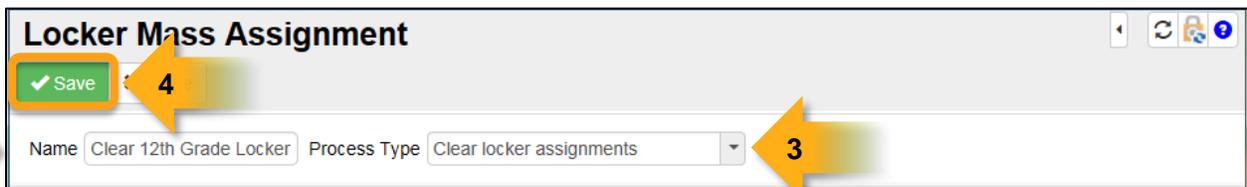
2. Enter a name for the process in the **Name** field.
3. Choose *Clear locker assignments* from the **Process Type** drop down menu.
4. Click the **Save** button.
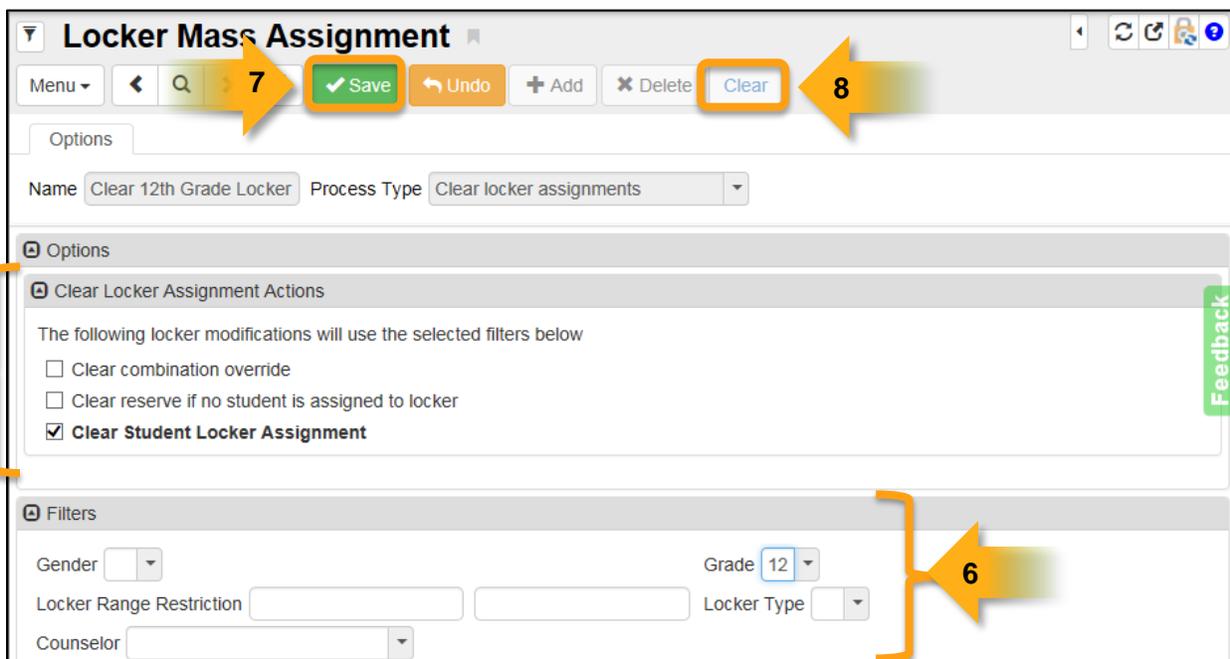
5. In the **Clear Locker Assignment Actions** group box, you may select one of the following options to clear assignments:
    a. **Clear combination override** = only clear the combination overrides, not the locker assignments.
    b. **Clear reserve if no student is assigned to locker** = removes the *Reserved status* from lockers that currently do not have students assigned to them.
    c. **Clear Student Locker Assignment** = clears all student locker assignments.
6. Select any of the filters from the **Filters** group box to further filter your locker clear mass assignment selection. (**Gender, Grade level, Locker Type, Locker Number** and/or **Counselor**) *We will select 12th Grade for our example.*
7. Click the **Save** button.
8. Click the **Clear** button to compete the process of clearing locker assignments.

Generating Locker Reports

There is only one type of Report available:

- **List Reports** generate summaries for multiple students.

Path: Synergy SIS > Locker > Reports > List

LCK401 – Student Locker Assignments report generates a list of those students who have locker assignments. For each student, the Name, Perm ID, Grade, Locker Number, Location and Combination are listed. Some schools use this report to generate a tri-fold sheet that contains multiple students' locker assignments & combinations that can be cut-up and distributed to students. You may filter the report output by Name, Perm ID, Grade, Location, Number and/or Access Method. You may also sort the report by term or period.

LCK402 – Students With No Lockers report generates a list of those students who do not have locker assignments. For each student, the Name, Perm ID, Grade, and Gender are listed. You may filter the report output by Name, Perm ID, and Grade.

LCK403 – Unassigned Lockers report generates a list of unassigned lockers that are available for assignment. The report includes general locker information such as Number, Type, Location, Condition and Restriction Information. You may filter the report output by Lock Number, Type, Location, Condition, Low Grade Restriction, High Grade Restriction, Not Used, Reserved or Gender Restriction.

LCK404 – Locker Student Assignments report generates a list of students' locker information including location, locker number and access method, (single or by group) those students who have locker assignments. Rather than showing a list by students, it will generate a list by lockers first and then the students assigned to them. The list includes the Locker Number, the assigned student's Name, Perm ID and Grade, as well as the Vertical Location and Combination. You may filter the report output by student information including various demographic details, or by a grade or grade range**. Note:** This report is used by some schools to fulfill student requests to have lockers in close proximity to another student. It provides information about locker location that helps to determine the available lockers for assignment.

LCK405 – Locker Master List report generates a master list of student lockers. You may filter the report output by Location, Type and Grade Restriction. This report includes the Locker Number, Locker Type, Location, Vertical Location and all the possible combinations. This list includes lockers that are both assigned and unassigned, and does not display student information.

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Self-Assessment Checklist

When attendees complete this training they will be able to:

- Manage Lockers
  - ☐ Locating a Locker
  - ☐ Adding a New Locker Record
  - ☐ Assigning Combinations
  - ☐ Adding Location Information
  - ☐ Assigning Student Restrictions
  - ☐ Assigning a Locker to a Student
- Locate a Student's Locker
- Mass Assign Lockers
  - ☐ Creating Locker Student Groups
  - ☐ Assigning Lockers by Section, Students or Student Groups
  - ☐ Clearing Locker Assignments
- Generate Locker Reports
  - ☐ For Lists of Students