



Synergy[®] ***SIS***

Navigation Training Module



Edupoint Educational Systems, LLC
1955 South Val Vista Road, Ste 200
Mesa, AZ 85204
Phone (877) 899-9111
Fax (800) 338-7646

November 2018

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

The Edupoint Synergy Student Information System (SIS) software and any form of supporting documentation are proprietary and confidential. Unauthorized reproduction or distribution of the software and any form of supporting documentation is strictly prohibited and may result in severe civil and criminal penalties.

Information in this document is provided in connection with Edupoint Educational Systems products. No license to any intellectual property rights is granted by this document.

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. Synergy and Edupoint are registered trademarks of Edupoint Educational Systems, LLC.

* Other names and brands may be claimed as the property of others.

Copyright 2018, Edupoint Educational Systems, LLC. All rights reserved.

Contents

Course Description	5
Expected Outcomes	5
Course Prerequisites	5
Preparing Your Browser Before You Start.....	6
Allowing Pop-Ups.....	6
Connecting to Synergy SIS.....	7
Learning the Parts of a Synergy Screen	8
The Title Bar (Blue Bar)	8
Changing Focus	8
Navigation Panels	24
Navigation.....	24
Creating a Navigation Group.....	24
Using Navigation Groups	27
Product Access Definition Tree Panel (PAD Tree).....	31
Bookmarks Panel.....	32
History Panel.....	33
Quick Nav Bar.....	34
Opening Screens in Synergy Quick Reference Guide (QRG) NAV01.....	36
Content Area.....	38
Content Area.....	42
Group Boxes	43
Grids	44
Using the Find Function to Display Data.....	46
Single Record Search	46
Multiple Record Search.....	47
Matrix Search	48
Printing or Exporting Matrix Find Results	50
Using Filters.....	53
Creating a Filter.....	53
Inactivating a Filter.....	54
Deleting Inactive Filters.....	55

Using Filters Quick Reference Guide (QRG) NAV03	56
Creating Graphs	58
Generating Reports	61
Using the Report Interface Buttons	61
Selecting Options – Options Tab.....	62
Selecting Sorting & Output – Sort/Output Tab	63
Adding Extra Conditions – Conditions Tab.....	64
Adding Selections – Selection Tab.....	64
Scheduling Reports as Jobs – Advanced Tab	65
Creating Graphs and Generating Reports Quick Reference Guide (QRG) NAV04	66
Self-Assessment Checklist	69

Course Description

In this course participants are presented with an overview of Synergy and they will learn how to navigate within the system. In addition, they will learn to view and print common reports. This course does not cover data entry.

Expected Outcomes

After completing this course participants will be able to:

- Log in to Synergy and navigate the interface
- Use the different navigation panels to quickly display screens
- Use and understand Synergy concepts and terminology
- Change Focus to view other years/schools
- Create personal Navigation Menus
- Use the Student screen to view basic information
- Find single students or groups of students
- Use a matrix to print student information or export student information to other desktop programs
- Create student filters
- Create graph information
- Save report settings
- Preview and print common reports
- Use the Job Queue Viewer

Course Prerequisites

Participants should have the following:

- Log-in Credentials
- Synergy View and Update security rights


Preparing Your Browser Before You Start

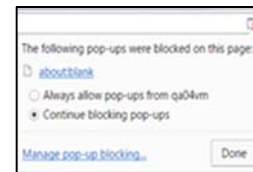
Allowing Pop-Ups

The Synergy program uses pop ups therefore all **Pop Up Blockers** must be **turned off** for Synergy to function correctly. To turn off pop up blockers:

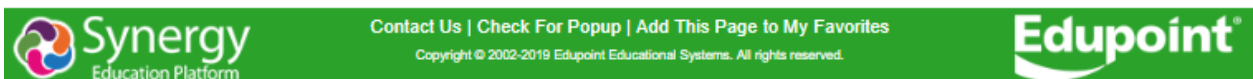
1. Click the **Yellow Banner** that displays at either the top or the bottom of your screen.
2. Select **Always Allow** pop ups from this site.
3. The preferred browser for optimal use is Google Chrome.

For Chrome:

Select the  then select from the drop list **Always allow pop-ups** from *Synergy URL*



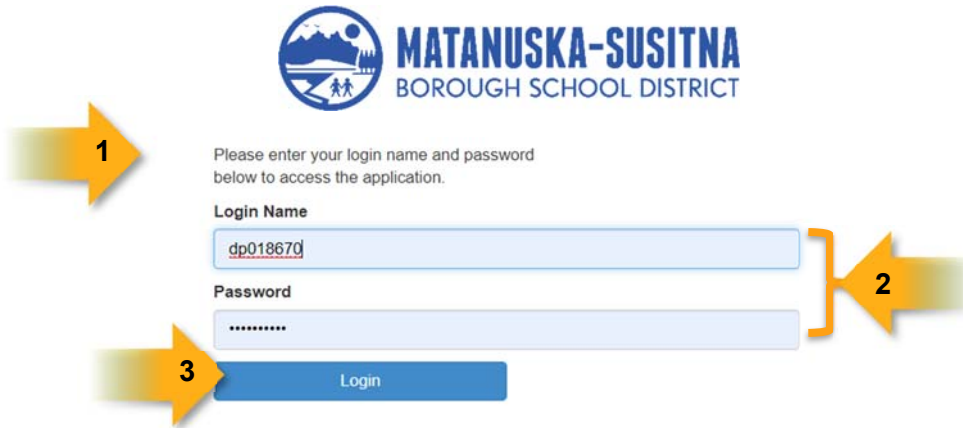
At the bottom of the Login Screen in the **Green Banner** area there are links to **Check For Popup** and **Add This Page to My Favorites** (see next page).



Connecting to Synergy SIS

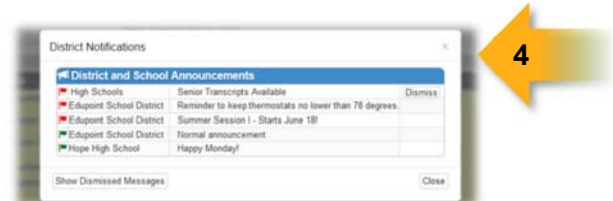
Enter the Synergy SIS URL as provided by your district administrator, and press **Enter** on your keyboard.

1. The **Synergy SIS** login screen displays.

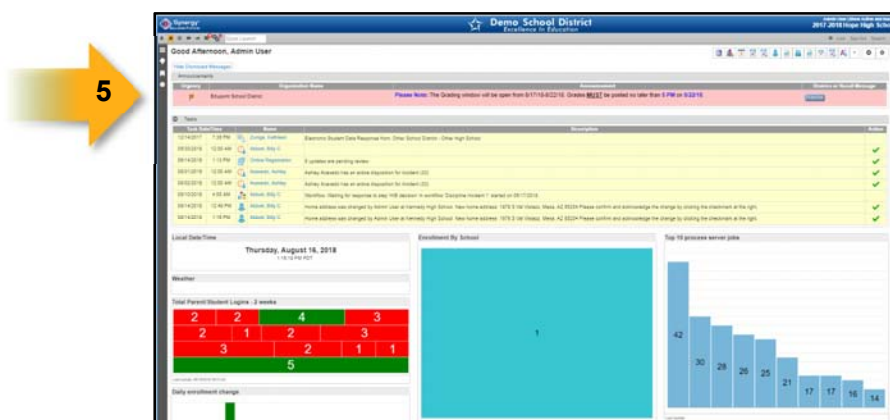


2. Enter your **Login Name** and **Password**.
3. Click **Login**, or press **Enter** on your keyboard.

4. A **District Notifications** pop-up screen displays. Click the **X** at the top right or click **Close**.



5. The **Synergy Home** page displays with district/school announcements. This screen may be customized to display dashboard task lists and a variety of widgets (please refer to the *Student Info User Guide Ver 2019*).



Learning the Parts of a Synergy Screen

The Title Bar (Blue Bar)

The **Title Bar** contains the About System Area, Focus Area, navigation controls, screen options, and support links.



1. **About System Area/Synergy Logo:** Click on the logo to display information about Synergy and the version being used at your school or district.
2. **District Logo:** Your school or district may display their logo here.
3. **Focus Area:** Displays the **School, School Year, User**, and type of **Students** (active, inactive or both) you are currently viewing. Your ability to change the **Focus** depends upon your user security rights.

Changing Focus

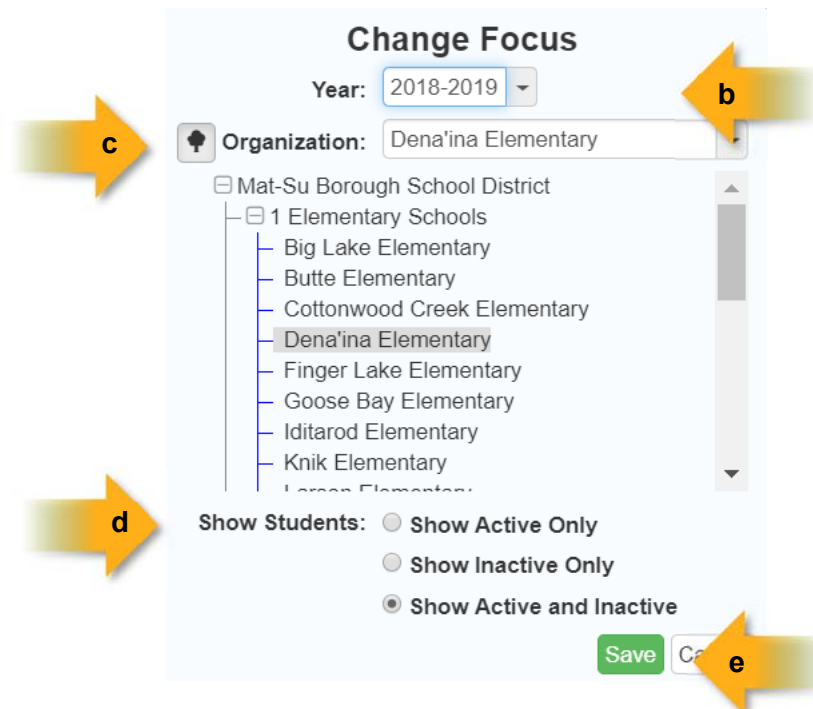
Each Synergy SIS user is setup to look at records for a specific school and year by default. The combination of school and year is called the **Focus**. The **Focus** determines if inactive, active or both types of student records are displayed. The user's current focus is listed at the top right-hand corner of the Screen. Sometimes the user may need to change their focus, either to a different year or to a different school.


To change the focus:

- a. Click once in the **Focus Area**.



- b. The Change **Focus** window displays. To change to a different school year or session, select from the **Year** drop-down.



- c. To change to a different school, click the Organization drop-down and select from an alphabetized list, or click the  icon to select from a categorized list.

Note: The focus may be set to the district or other organizational grouping; however, student information may only be edited when focused at a school. Information may be viewed at the district or other organization group level, but it may not be changed.

- d. To change the type of student records displayed, select from **Show Active Only**, **Show Inactive Only**, or **Show Active and Inactive**.
- e. Click **Save** when finished. The screen closes and the Focus changes.

4. The bottom portion of the **Title Bar** contains:

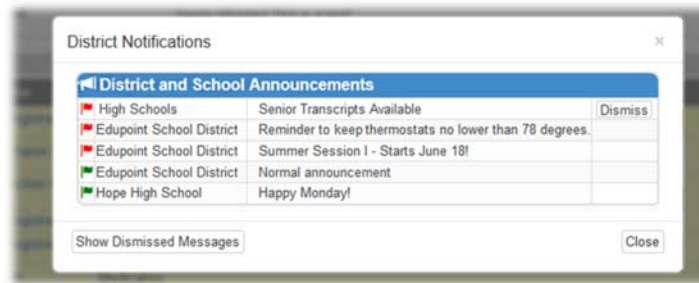


-  **Home Icon**

To return to the Home page at any time from any screen, click the **Home** icon.

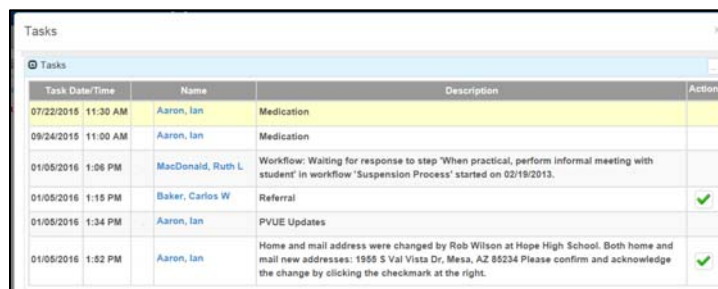
-  **Announcements Icon**


To view the **District and School Notifications** screen that displayed when you initially logged in, click the **Announcements** link. A number resting in the corner of the icon tells the number of new announcements.



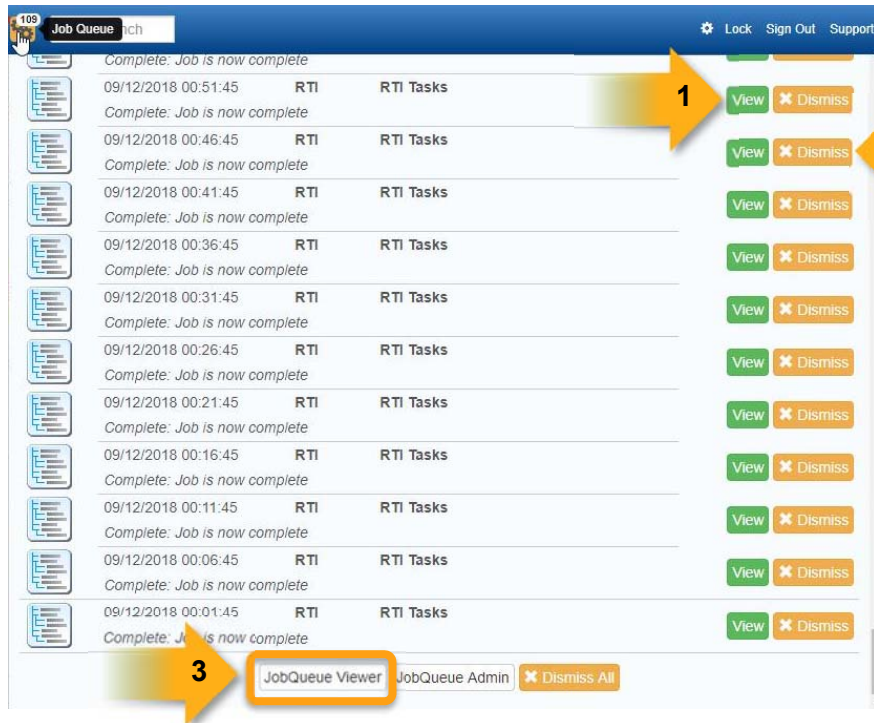
-  **Tasks Icon**

To view the tasks assigned to you, click the **Tasks** link. These are the same tasks viewed on the **Home** screen. A number resting in the corner of the icon reflects the number of tasks waiting to be addressed.

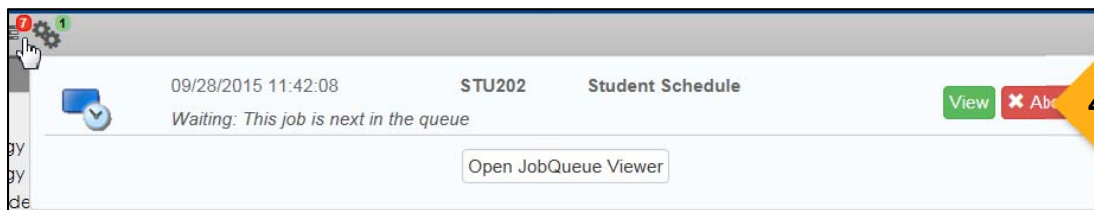


- 
Job Queue Icon

Once a report or process is submitted, the status is listed in the **Job Queue Viewer**. A snapshot of the status in **Job Queue** is available by hovering on this link. A number resting in the corner of the icon represents the number of new jobs in the queue.

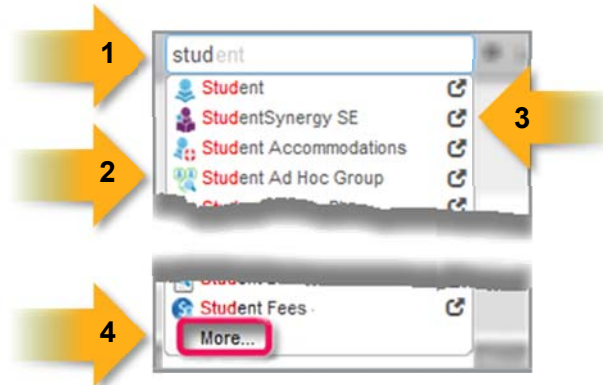


1. If the job is complete, click **View** to open the report.
2. To dismiss the job, click **Dismiss**. The details of the job may still be viewed from the Job Queue screen.
3. To see the details, click **Open JobQueue Viewer**.
4. If you need to stop a job from processing, click **Abort**.



- Quick Launch
Quick Launch Bar

The **Quick Launch** bar is turned on and off for each user on the User screen by the system administrator. It provides a quick way to “launch” a screen by simply typing the name of the screen in the box.



1. To locate a screen, begin typing a few letters. The system displays the screens available that are a match.
2. Scroll down to select a screen and click the icon or name.
3. To open the screen in a separate window, click the detach screen icon.
4. If the screen you want is not displayed, hover over **More...**

-  **Screen Options Icon**

The **Screen Options** icon provides a quick way to customize the viewing experience. Hover over the icon to view the options. Click the option to select or deselect it.

<p>Options</p> <p><input type="checkbox"/> Show Compact View</p> <p><input checked="" type="checkbox"/> Show Field Information</p> <p><input type="checkbox"/> Show Full Header</p> <p><input type="checkbox"/> Don't Pin Grid Headers</p> <p><input type="checkbox"/> Show Docking Area</p> <p><input type="checkbox"/> Show High Contrast</p> <p><input checked="" type="checkbox"/> Show Snapshot Views</p> <p><input type="checkbox"/> Use The Default AutoFocus Fields</p> <p><input type="checkbox"/> Lock QuickNav Bar</p> <p><input type="checkbox"/> Large Notification Icons</p>	<p>Navigation Mode</p> <p><input checked="" type="radio"/> Standard</p> <p><input type="radio"/> Accessible</p> <p><input type="radio"/> Classic</p> <p>Autosave Option</p> <p><input checked="" type="radio"/> No Autosave</p> <p><input type="radio"/> Always Prompt</p> <p><input type="radio"/> Autosave</p> <p>Resume on Login</p> <p><input type="radio"/> Never</p> <p><input checked="" type="radio"/> Prompt</p> <p><input type="radio"/> Always</p>
---	--

- **Show Compact View**

Selecting **Show Compact View** provides the ability to activate a visual mode that eliminates some of the empty space on the screen, allowing more content to display. Users accessing the system with smaller screens can select this mode to fit as much information as possible on the screen.

- **Show Field Information**

If **Show BO On Mouseover** has been enabled by your system administrator, hovering over a field identifies the corresponding business object information.



- **Show Full Header**

Deselecting the **Show Full Header** option removes the gray bar from the **Title Bar** and condenses it into one blue bar to provide additional room for the **Content Area**.

Selected:



Deselected:

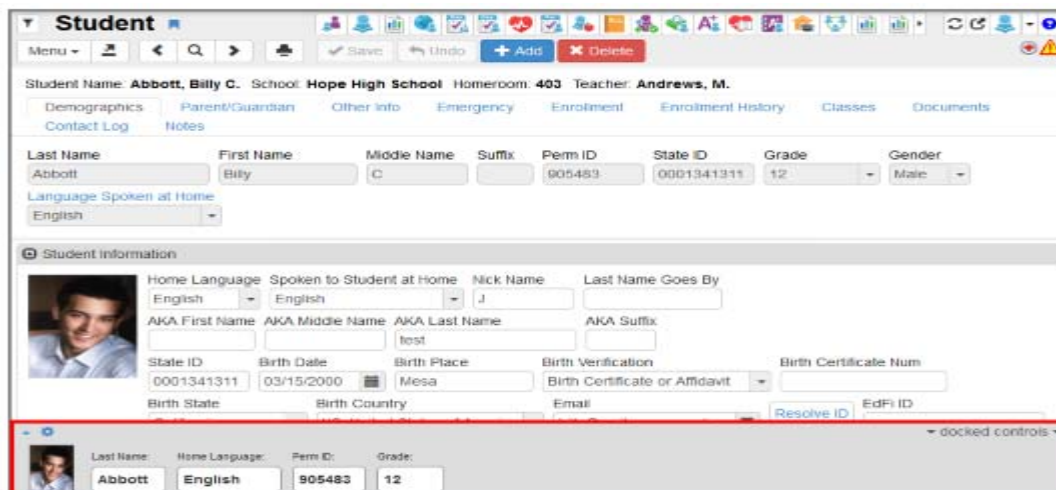


- **Don't Pin Grid Headers**

Selecting **Don't Pin Grid Headers** prevents the header row of a grid from always remaining at the top when scrolling large grids.

- **Show Docking Area**

In **Show Docking Area** you can display or hide the docking panel that appears on the bottom of the Synergy SIS screens.



Adding a Docking Panel

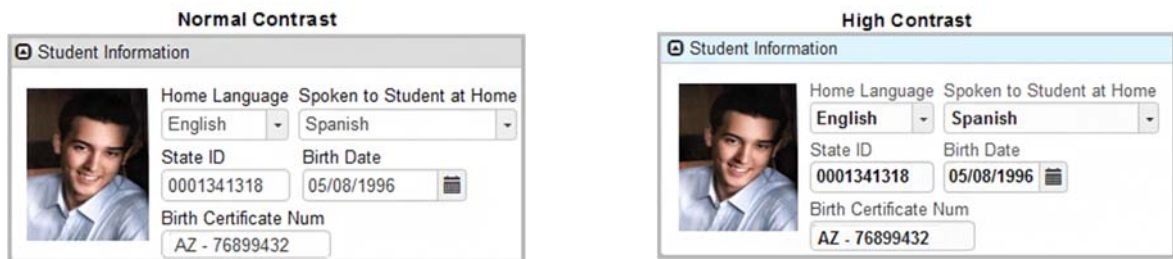
1. Click the arrow on the bottom left of the screen.

2. Click the Add New Panel.
3. Hold the **Ctrl** key to click and drag desired fields to the panel. This outlines the fields in orange.
 - Click and drag the fields within the panel to change their order.
 - Click the **X** in the field to remove it from the panel.
4. Select a different docking panel by clicking the arrow on the bottom left of the screen and choosing the panel to view.
5. Click the **X** on the far right of the desired panel to delete a docking panel.
6. Click **Docked Controls** in the bottom right to show or hide a panel.
 - When expanded, the selected panel is visible as the user moves between records.
 - When collapsed, the selected panel is hidden.

For more information regarding the **Docking Panel Options**, see *Getting Started with Synergy SIS Guide*.

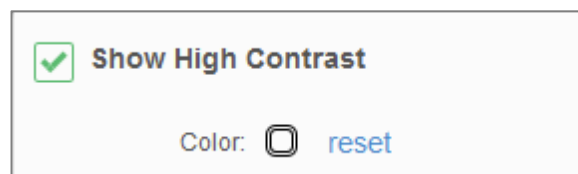
- **Show High Contrast**

Show High Contrast provides the ability to activate a visual mode that some might find beneficial for reading text on a computer screen. Data text is bolded to contrast with label text, which is a shade lighter.

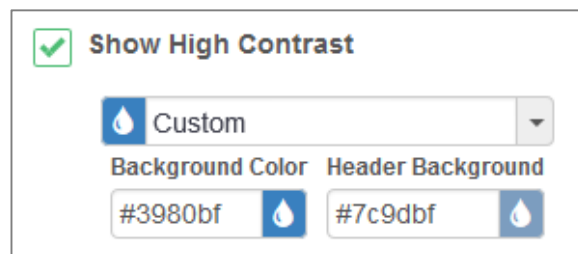


In **High Contrast** mode, there is the option to select any color desired for the group box grid and panel. The group box header displays in the complementary color (or near to it.) The interface displays a shade darker. The color selection is retained and will display on the next log on. **Note: High Contrast** color schemes are only visible when focused to the current school year.

In High Contrast mode, you also have the option to select a color theme to use on Synergy SIS screens. You can also set a Custom theme with any color desired for the **Background Color** and **Header Background**. The color selection is retained and displays on the next login.

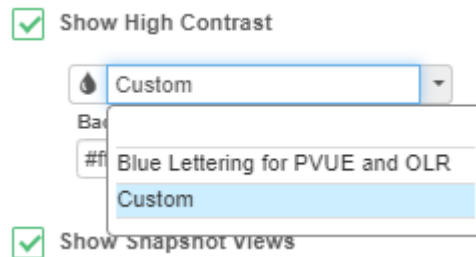


Synergy SIS Options



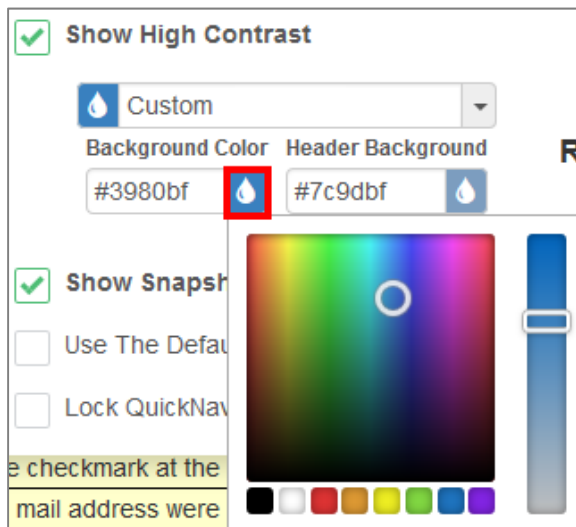
Screen Options Tool

- Select the Theme from the list to change the contrast color.



Screen Options Tool High Contrast Color Picker

Manually adjust the **Background Color** and/or **Header Background** using the mouse to move the circle to select the desired color. These colors become the *Custom* theme.



High Contrast settings only display when focused to the current school year. If the focus is set to a previous year or a future year, the screen colors cannot be changed from their default green and brown, respectively.



The screenshot shows the Synergy Student screen for the 2017-2018 school year. The interface includes a top navigation bar with the Synergy logo, user name 'Dina Henderson (Show Active and Inactive)', and school '2017-2018 Colony High School'. Below the navigation bar is a 'Student' header with a search bar and 'Find', 'Undo', and 'Add' buttons. The main content area is divided into tabs: Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, Documents, Contact Log, Teacher Notes, and MSBSD. The Demographics tab is active, showing fields for Last Name, First Name, Middle Name, Suffix, Student ID, and AK Student ID. Below these are fields for Grade and Gender.

Student Screen, Past School Year Focus



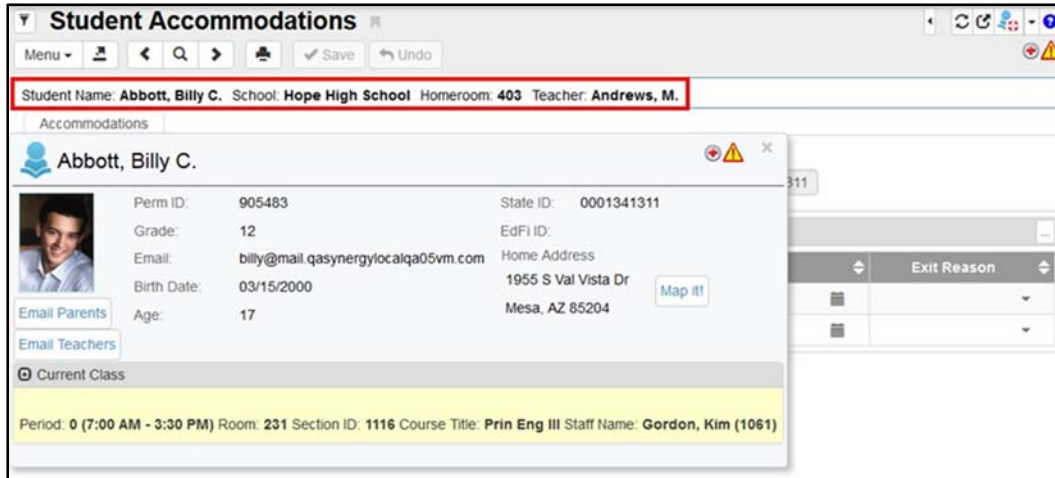
The screenshot shows the Synergy Student screen for the 2019-2020 school year. The interface is identical to the previous screenshot, but the school name in the top right corner is '2019-2020 Colony High School'. The 'Student' header and main content area are the same, with the Demographics tab active and fields for student information.

Student Screen, Future School Year Focus

The group box/grid headers are colored for easier identification.

- **Show Snapshot Views**

The **Show Snapshot Views** feature displays a snapshot of data for Student, Parent, Staff, Section, Course, and School Rooms on mouse-over.

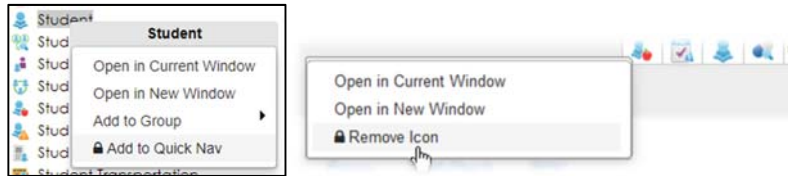


- **Use The Default AutoFocus Fields**

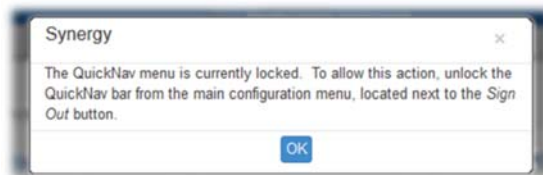
Auto Focus allows administrators to configure the system to automatically place the cursor in a specific field when viewing Find mode on a screen. For example, the Student screen can have the auto focus field be the **Perm ID** field if this is the primary field used in student searches. Select **Use The Default AutoFocus Fields** to disable this feature and focus to the default field in Find mode, which is typically the first field on a screen.

- **Lock Quick Nav Bar**

Once you have selected the **Lock Quick Nav Bar** checkbox, a lock icon displays when attempting to add an icon in the **PAD (Product Access Definition) Tree** and when attempting to remove an icon from the **QuickNav Bar**.



If **Add/Remove Icon** is selected, this message displays. The option must be deselected to add or remove an icon on the **QuickNav Bar**.



Navigation Modes:

- **Standard**

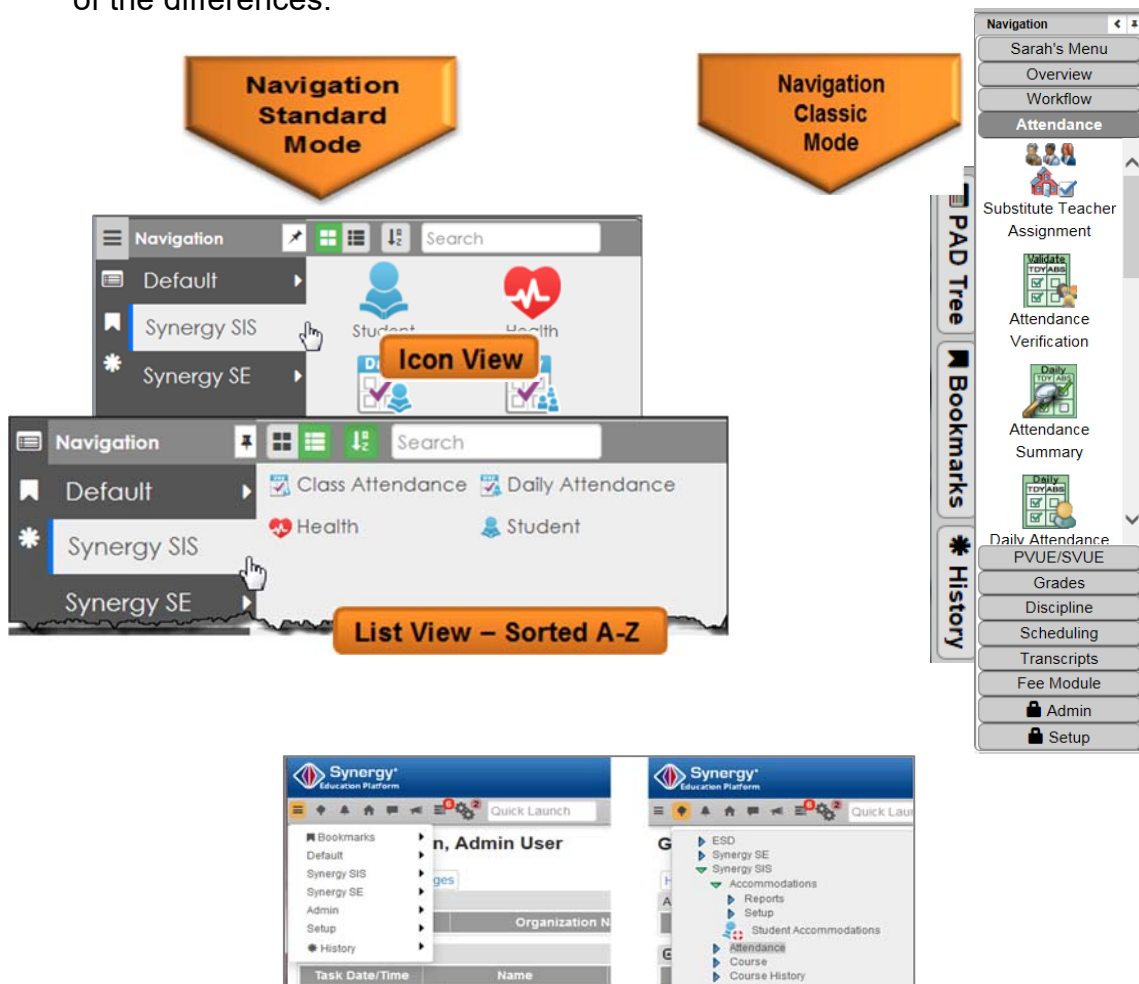
This is the default appearance of Synergy

- **Accessible**

This option changes the interface for compatibility with screen reader programs such as JAWS. Navigation options display at the top of the screen and there are no sidebar elements.

- **Classic**

When this option is selected, the look of the interface changes slightly and resembles earlier versions of Synergy. Displayed below are examples of some of the differences.

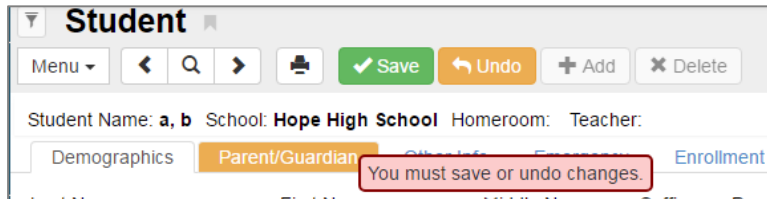


Accessible Mode

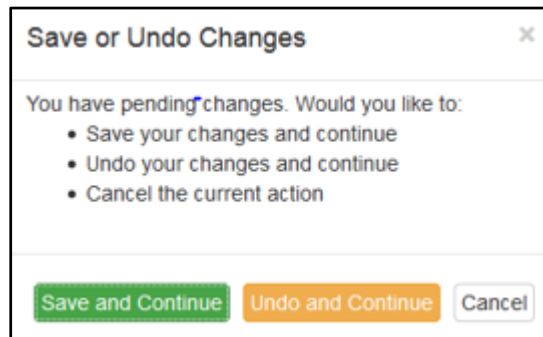
Autosave Option

The **Autosave** feature saves data when navigating to different tabs or screens.

- **No Autosave** – This is the default option. Synergy SIS generates a warning message when attempting to move to another tab or screen without saving changes. You must manually save all information.



- **Always Prompt** – (Recommended) Synergy SIS generates a message when moving to a different tab or screen that prompts you to save pending changes. You can click **Save and Continue**, **Undo and Continue**, or **Cancel**. Selecting any of the continue options opens the previously chosen screen.

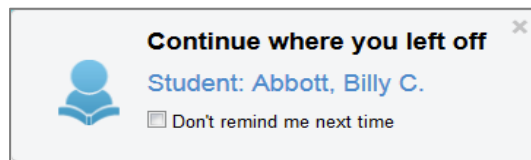


- **Autosave** – Synergy automatically saves entered data before opening the requested tab or screen. You do not need to manually click **Save** after entering information.

Resume on Login

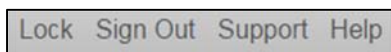
The **Resume on Login** feature allows you to return to the last screen and tab you visited prior to logging out. You can select one of the following options:

- **Never** – On login, opens the Synergy SIS Home Page, or the screen specified as your home page.
- **Prompt** – On login, displays a prompt asking if you want to return to the screen and tab you previously visited. Click the link to navigate to the screen. Select **Don't remind me next time** to change this setting to *Never*.



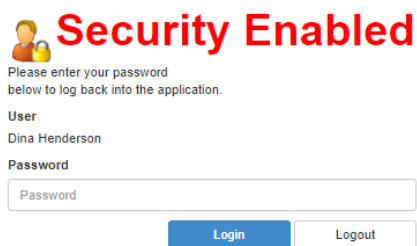
- **Always** – On login, automatically returns you to the screen you previously visited.

The remaining actions on the lower part of the **Title Bar** include:



Lock

This locks the **Synergy SIS** screen. The password must be re-entered to access the screen, similar to the screen lock in Windows. This is helpful when the user needs to leave their desk momentarily and does not want to lose their work, but the information needs to be secured



Sign Out

Click this link to log out of Synergy SIS and return to the **Login** page.



Support

This links to a page with information about how to receive support for the MSBSD Synergy SIS system in TeamDynamix: Knowledge Base.

Help

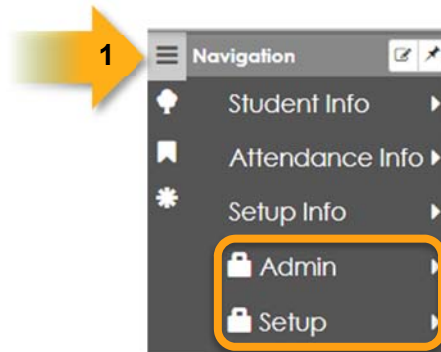
This links to the online help system that opens a list of Synergy SIS help guides in a new screen. The online help is a separate installation.

Navigation Panels

The Navigation Panels are accessed from the side of any Synergy screen. When viewing, each panel may be left as a “hover over” display - , or “pinned” so that the content is always displayed - .

Navigation

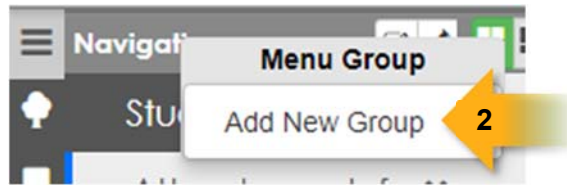
The **Navigation Panel** contains one or more toolbars that contain groups of icons, which represent shortcuts to frequently used areas in Synergy SIS. Each user may create custom toolbar groups or groups can be setup by the Synergy SIS system administrator. If the Synergy SIS system administrator creates the Navigation menu there is a **Lock Icon** next to the **Menu Group**.



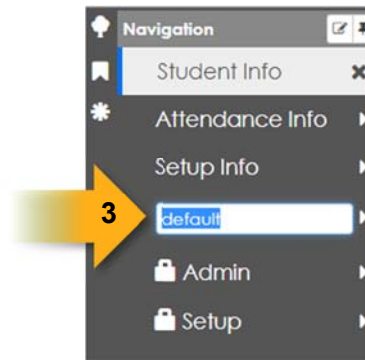
Creating a Navigation Group

The following steps guide you through creating a User defined Navigation Group:

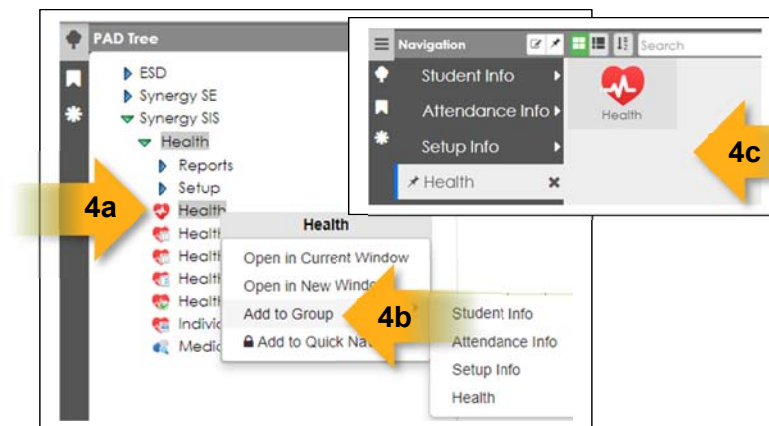




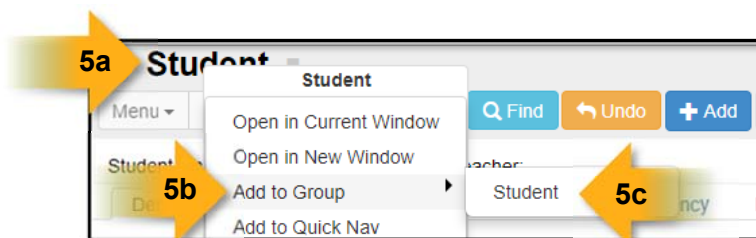
1. Hover over the **Navigation Panel** and right click the word **Navigation** a menu displays.
2. Select **Add New Group** from the **Menu Group**.



3. The group is added with the name “default” highlighted in blue. Change “**default**” to a name that describes the group. **NOTE:** To change the name of the Navigation Group after it is saved you can right click the name and select **Rename Group** from the menu.



4. To add an icon to a Navigation Group:
 - a. Locate the screen or report to add on the **PAD Tree** panel.
 - b. Right-click the icon, scroll-over **Add to Group**, and select the destination group, OR
 - c. Drag and drop the icon into the icon group area for the destination toolbar.



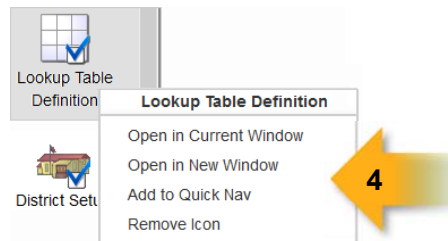
5. Items can also be added to a Navigation Group from any screen or report:
 - a. From the desired screen and Right-click on the Screen Name.
 - b. Hover over the **Add to Group** and a list of your groups will appear.
 - c. Click the title of the group you want to add to.

Using Navigation Groups




1. Click Navigation and hover your mouse over the name of the Navigation Group you wish to utilize. The icons for the screens that have been added to that Navigation Folder display in a grouping on the right.



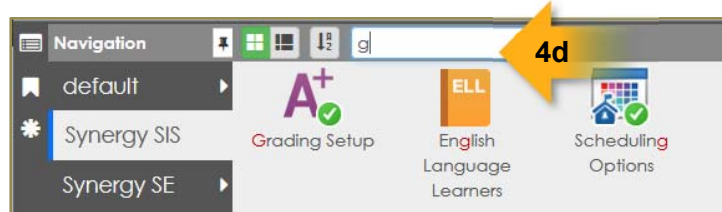
2. Click the icon to display the screen.
3. Right click the icon to view additional options. The screen may be opened in the current window or a new “detached” window. It may also be added to your **Quick Nav** bar. There is also the option to remove it from the toolbar altogether, unless a lock icon displays next to the toolbar name. In that case, you may not remove the icon.



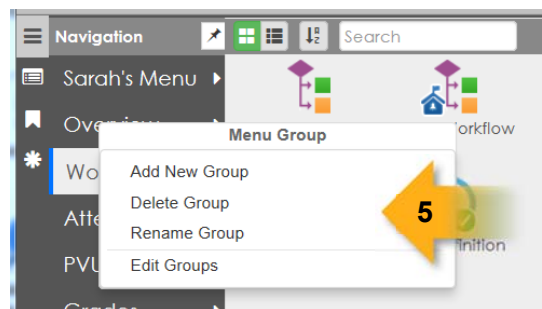
4. In the Standard Mode, at the top of each group there are additional options to sort and filter your groups.

- a. Click  to view the group by icons.
- b. Click  to view the group by list.
- c. Click  to sort the group A-Z.


- d. Start typing the screen name in the **Search** box and the system quickly filters down the list.

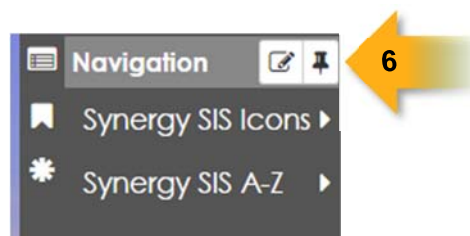



5. To add/delete/rename or edit your Navigation Groups:
 - a. Right-click on a **Group Name**.
 - b. Click the action to perform.

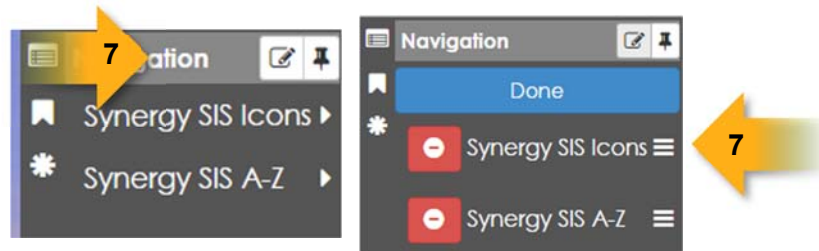


Note: Delete actions display a confirmation message.

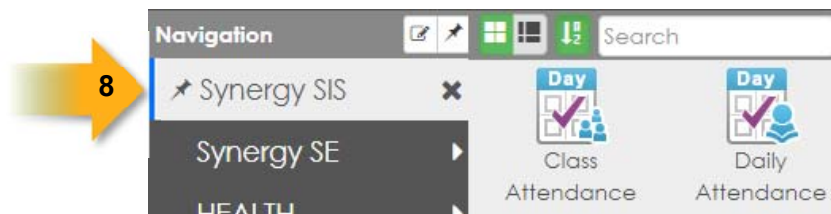
6. To pin a toolbar group open click the  icon.



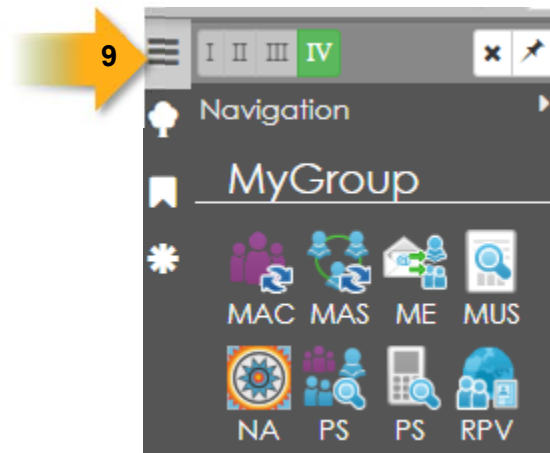
7. To edit a toolbar, click the  icon. This will allow you to Delete or Move the Groups Names display. Click **Done** when finished.



8. Click the pin icon next to the Navigation Group name to display menu items below the group name.

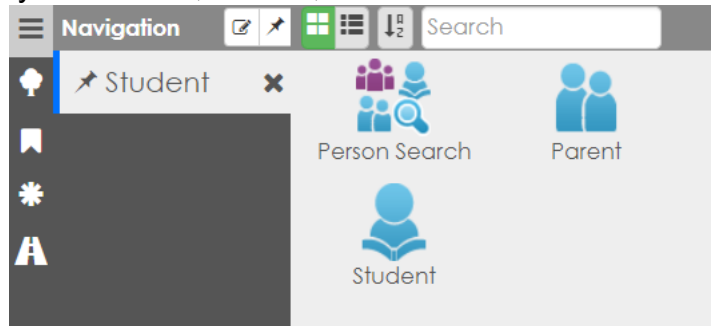


9. Click the column icons to display the menu icons in one, two, three, or four columns. When using more than one column, icons will appear with abbreviations of the screen name.



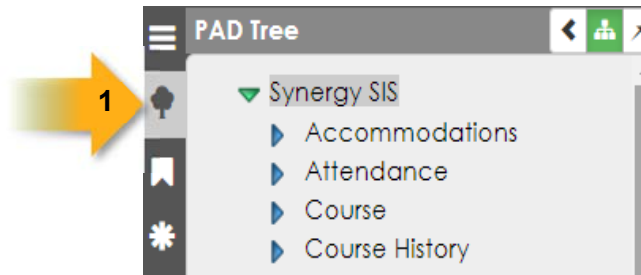
Practice Activity: Navigation Group

1. Create a **Navigation Group** by right clicking on **Navigation** and selecting **Add New Group**.
2. Name the group **Student** by typing when **default** is highlighted in blue. Or, right click on the default name and choose **Rename Group**.
3. Place the following items into the **Student Group**. Be sure to use a variety of ways: **Student, Parent, Person Search**

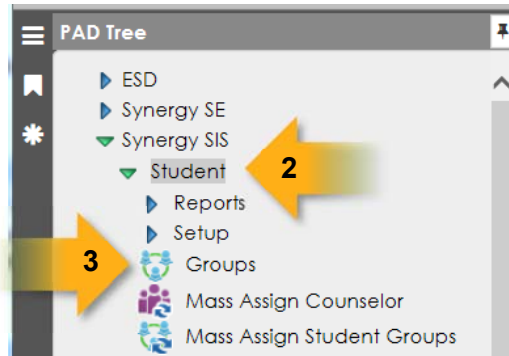


Product Access Definition Tree Panel (PAD Tree)

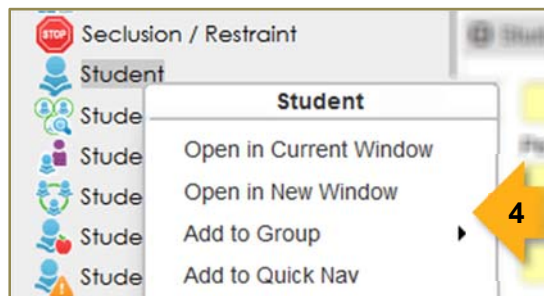
The **Product Access Definition Tree** or **PAD Tree** lists all screens or reports a user can access.



1. To open the **PAD Tree** hover over the tree icon on the navigation display.



2. Click **Synergy SIS**, then click the **name** of the node or the **blue triangle** next to it in order to expand the folder and view its contents. **Note:** When a triangle is clicked, it turns green and points downward.
3. Scroll down until the desired screen or report is displayed. Click the **screen name** or **icon** to open the screen.
4. Right-click the **screen name** or **icon** to display additional options.

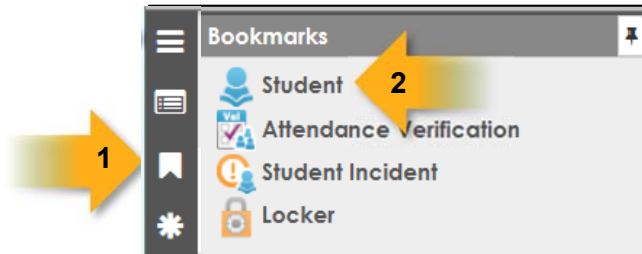


Practice Activity: PAD Tree

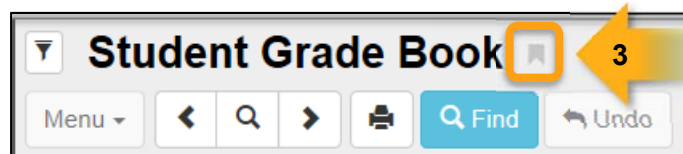
1. Navigate to **Synergy SIS > Student > Groups**.
2. Right Click on **Groups**. Choose **Open in Current Window**, then **Open in New Window**. This can be added to the **Group: Student** or **Add to Quick Nav**.

Bookmarks Panel

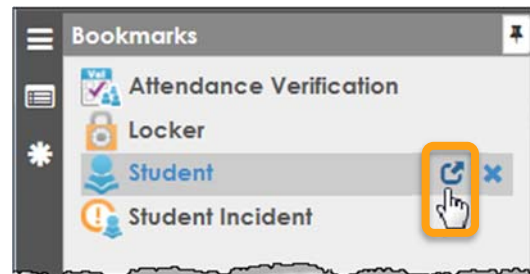
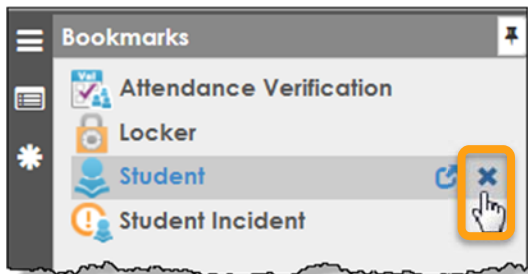
Bookmark any frequently used screen, report, or process by clicking the bookmark to the right of the screen title for quick access later.



1. To open the **Bookmarks Panel**, click the third icon on the panel display.
2. Click on any screen name or icon to open the screen.



3. To bookmark any frequently used screen, report or process, click the bookmark icon to the right of the screen name. Once a screen is bookmarked, the bookmark icon turns **blue**. To remove the bookmark, click the icon again and it turns gray.



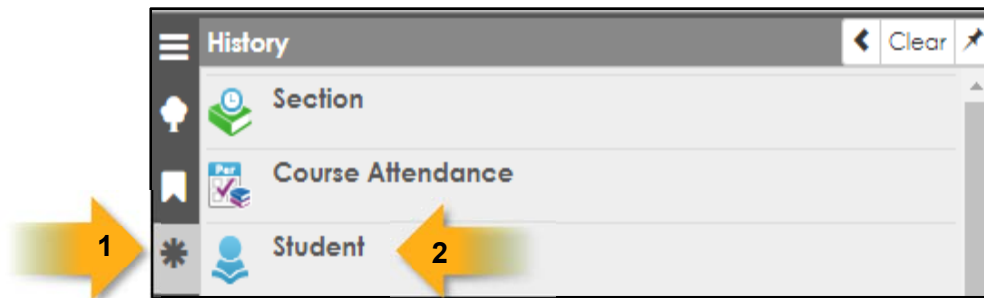
4. Another way to remove a screen from the bookmark panel is to click the blue **X**. To open the screen in a separate window, click the detach screen icon.

Practice Activity: Bookmarks Panel

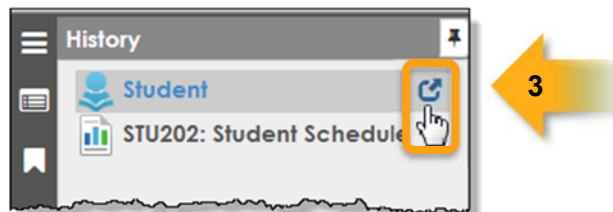
1. Navigate to **Synergy SIS > Student > Groups**
2. Add this to the **Bookmark Panel** by clicking the **grey bookmark** to the right of the **Groups** title. This will now appear as an option when the Bookmark is clicked on.

History Panel

Return to any screen, report, or process visited during the current session by selecting it from the list on the **History** panel. Click **Clear** at the top of the panel to remove all data. A confirmation message appears to verify deletion.



1. To open the **History Panel**, click the asterisk on the panel display.
2. To open any screen, report or process previously visited during the current session, **click** the icon or screen name.



3. To open the screen in a separate window, click the detach screen icon.



Note: The panel displays the screens in the order visited, with the first screen visited on the bottom of the list and the last (most recent) screen at the top.

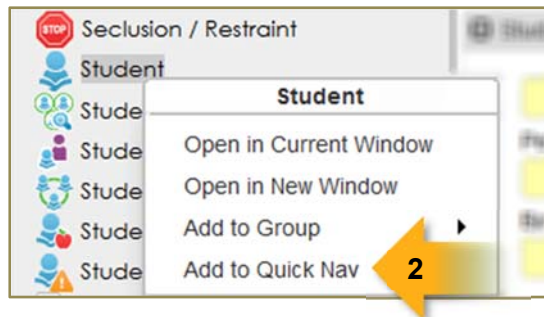
Quick Nav Bar

Similar to the Navigation panel, the **Quick Nav Bar** is a great place for the screens accessed often. It is more helpful as users become familiar with the icons for the different screens.

One of the advantages of using the **Quick Nav Bar** is that the screens that are activated are “detached”, or opened in a new window. This means that several screens can be open at the same time. The detached screens can even be the same screen but with different records open at the same time.



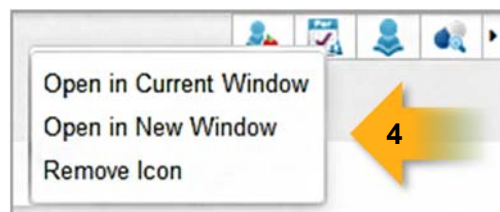
1. Click the arrow icons –  or  - to open or hide the **Quick Nav Bar**.



2. To add a screen to the **Quick Nav Bar**, from the **PAD Tree** or **Navigation** panels right-click on the screen name or icon and select **Add to Quick Nav**.



3. To change the icon display order, click and hold the icon and drag and drop in the desired position.







4. Right-click on the **screen name** or **icon** to view the additional options menu.

Practice Activity: Quick Nav Bar

1. Navigate to **Synergy SIS > Student > Student**.
2. Add this to the **Quick Nav Bar** by right clicking and choosing **Add to Quick Nav** or by right clicking on the title of the screen and choosing **Add to Quick Nav**.
3. Add the following screens to **Quick Nav**: **Person Search, Groups, Health,**

Opening Screens in Synergy Quick Reference Guide (QRG) NAV01

How to:	Steps:
<p>Create a Navigation Group</p>	<ul style="list-style-type: none"> ▪ Click the Navigation Panel found at the top left.  ▪ Right click on Navigation and choose Add New Group. ▪ A new box will show on the left called “default”. To change the name, click inside the box while it is outlined in blue or, right click on the “default” name and choose Rename Group. ▪ Adding screens to the folder can be done by navigating from the PAD Tree  to the desired title, right click, choose Add to Group and select the desired group. Screens can also be added by right clicking on the screen title, choosing Add to Group and choosing the desired group.
<p>Product Access Definition Panel (PAD Tree)</p>	<ul style="list-style-type: none"> ▪ Click Synergy SIS, click the name of the module or the blue triangle next to it to expand the folder and view its contents. Note: When a triangle is clicked, it turns green and points downward. ▪ Scroll down until the desired screen or report is displayed. Click the screen name or icon to open the screen. ▪ Right-click the screen name or icon to display additional options.
<p>Create Bookmarks</p>	<ul style="list-style-type: none"> ▪ A Bookmark can be created from any screen by clicking on the Bookmark icon to the right of the Title. The icon will be blue when it’s Bookmarked. ▪ Bookmarks can be viewed and accessed by going to the  Bookmark icon.
<p>History Panel</p>	<ul style="list-style-type: none"> ▪ The History Panel  stores the latest browsing history. Screens are shown at the top followed by the entity groups such as Student, Sections, Parents, etc.
<p>Quick Launch</p>	<ul style="list-style-type: none"> ▪ The Quick Launch allows screens and reports to be accessed by entering just a few letters of the title into the field. A drop down list appears with the possible options. Clicking on the name will open it in the current screen or it can be opened in a separate screen by clicking the blue detach screen option.

Quick Nav Bar

- The **Quick Nav Bar** offers easy access to screens that are often used. They are opened in a “detached” window.
- Screens can be added through the **PAD Tree** by right clicking on the desired item and choosing **Add to Quick Nav** or by right clicking on the title of any active screen and choosing **Add to Quick Nav**.
- Icons are displayed in the upper right hand corner of active screens. Hovering over the icon will show what it represents.

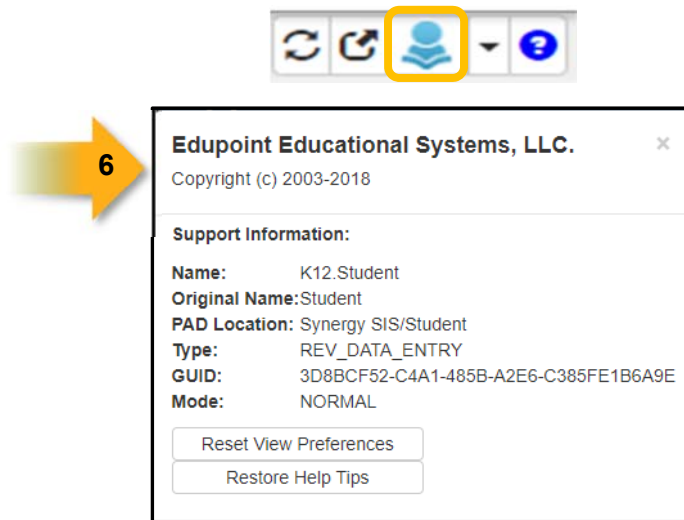
- Bookmark** – You may bookmark any frequently used screen, report, or process by clicking the **Bookmark** icon to the right of the screen title for quick access later.



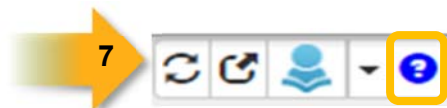
- Refresh** – This button refreshes the data on your current screen.



- Detach View** – This button opens the screen in a separate browser window. In a detached screen, all of the normal functions in the screen still work, such as entering information in fields. An unlimited number of detached screens may be opened.



- About** – Clicking this button displays information about the current screen in view.

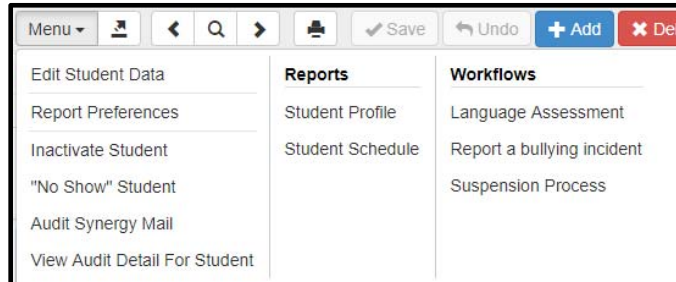


- Context Sensitive Help** – This button opens a window that provides help for the current screen.

8



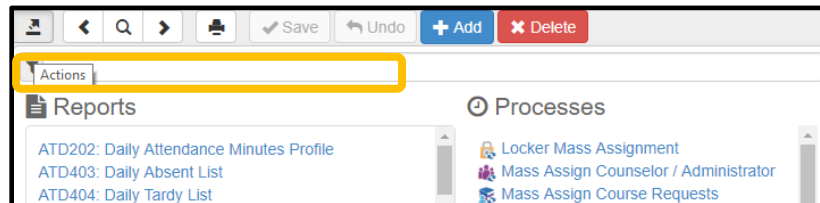
8. **Menu** – Hovering over the **Menu** will show a drop-down list of actions for the screen, **Reports**, and **Workflows** for the current screen.



9



9. **Actions** – Hovering over the **Actions** icon will populate a drop-down of **Reports** and **Processes** that can be selected and executed for the student currently focused on.



Reports and Processes can be selected by scrolling down or by typing the name in the **filter** area.

10



10. **Previous** – This button scrolls to the previous record in the screen. Records are sorted in alphabetical order by the first field in the screen, so the **Previous** button scrolls through the records in descending order by this field.

11



11. **Switch to Find Mode** – This button switches the screen to find records instead of screening or editing the records. The available search fields for the screen will display yellow in Find Mode.

12



12. **Next** – This button scrolls to the next record and displays it on the screen. Records are sorted in alphabetical order by the first field in the screen, so the **Next** button scrolls through the records in ascending order by this field.

13



13. **Print** – This button prints the current screen as it is currently displayed.

14



14. **Save/Find/Edit** – These buttons change as the screen is set in different modes. In Inquiry mode, an **Edit** button switches the screen so that the record can be changed. In Find mode, it is a **Find** button that searches for records that match the information entered in the screen. In Edit mode, it is a **Save** button to save any changes made to the record in the screen.

15



15. **Undo** – The **Undo** button reverses any changes made to the data in the record currently displayed.

16



16. **Add** – This button opens a screen for adding records to the current screen.

17



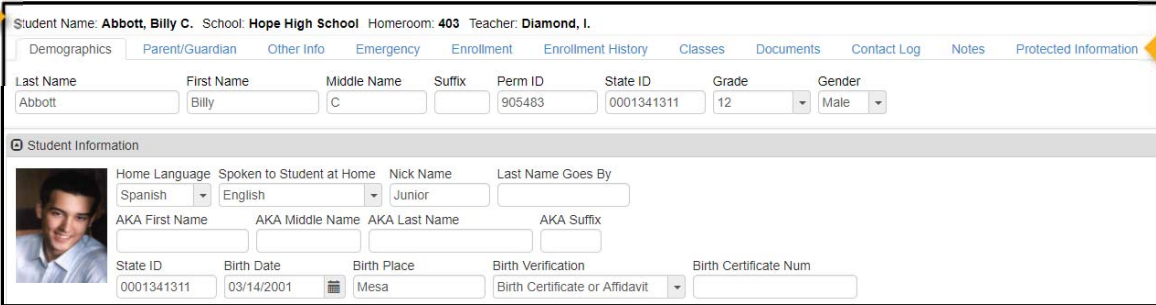
17. **Delete** – This button deletes the current record from the screen. Deletions may not be reversed.

18

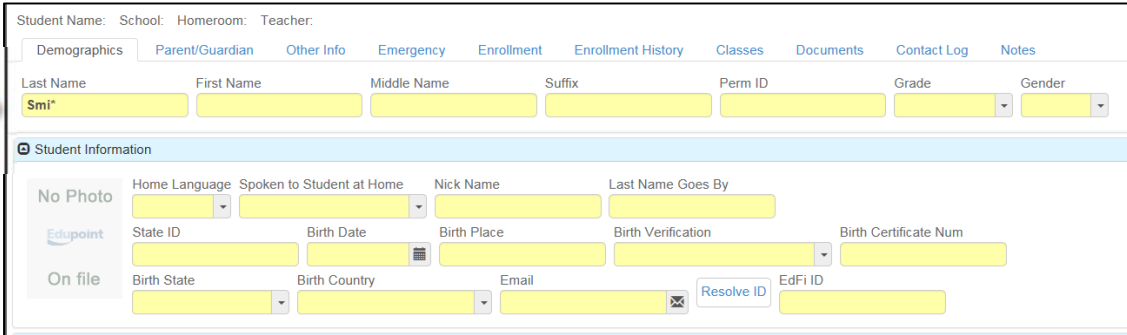


18. **Notification** – An icon displays here to alert users when a student record has a special notification attached to it, such as a medical condition. Some records will have several icons displayed, others may have none.

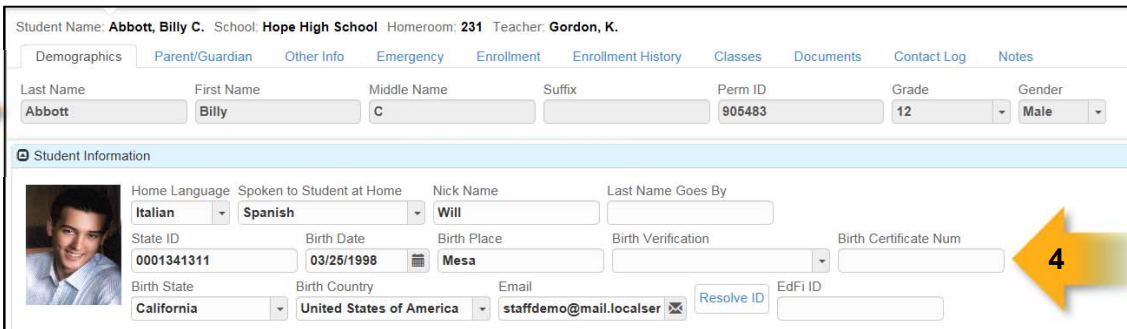
Content Area



1. At the top of the **Student** screen, the **Title Area** displays the **Student Name, School, Homeroom** and **Teacher**.
2. The **Tab Group** displays all tabs available to the user for the screen displayed.



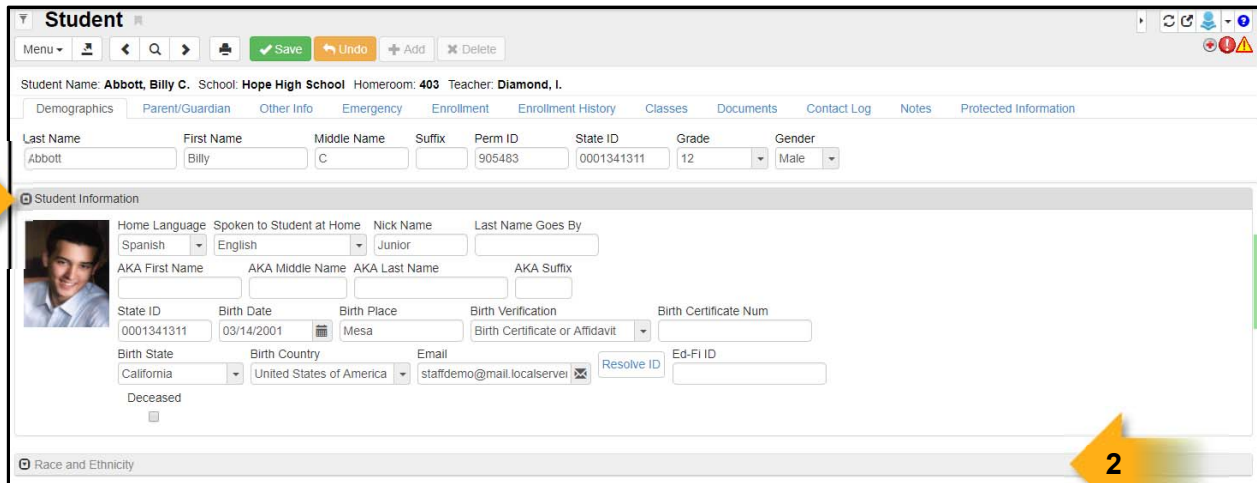
3. When the screen is in **Find** mode, the fields are yellow. Information entered when a field is yellow is used as criteria when searching for records.





4. When the screen is in **Edit** mode, fields that may be edited have a white background. Fields that may not be edited have a gray background.

Group Boxes

Multiple group boxes display within a screen to separate data. The **Group Box** contains additional information that may be minimized by the user or the program.



The screenshot shows a web application window titled "Student". Below the title bar is a menu with options: Menu, Save, Undo, Add, and Delete. The main content area displays student information for "Abbott, Billy C." at "Hope High School". A group box titled "Student Information" is expanded, showing fields for Home Language, Spoken to Student at Home, Nick Name, Last Name Goes By, AKA First Name, AKA Middle Name, AKA Last Name, AKA Suffix, State ID, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, Ed-Fi ID, and Deceased. A "Race and Ethnicity" group box is partially visible at the bottom. A yellow arrow labeled "1" points to the minimize and maximize icons on the left side of the "Student Information" group box title. Another yellow arrow labeled "2" points to the "Student Information" group box title bar.

1. Click the arrow icon -  or  - on the left side of the group box title to minimize (close) or maximize (open) the group box.
2. When the group box is minimized the group box title is light gray, when it is maximized the title is dark gray.

Note: If the user has changed color schemes these colors will vary.

Different types of fields that are included in group boxes are:

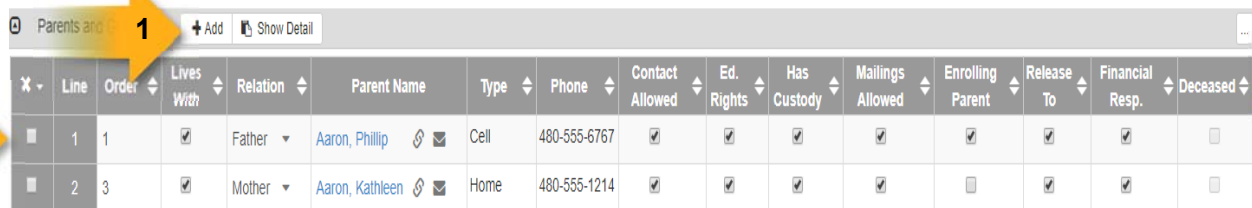
- Text Entry
- Drop Down
- Date
- Email
- Checkbox
- Radio Button
- Action Button
- Check/Uncheck All
- Hyperlink
- Find Foreign Key
- Shrink/Grow Textbox
- Time Icon
- Ellipsis Button

Grids

Grids are used to hold multiple records of information, such as the Phone Numbers grid shown below. You will find different grids throughout the system. Some other grids are Parent/Guardian, Emergency Contacts, and Nurses Visits.

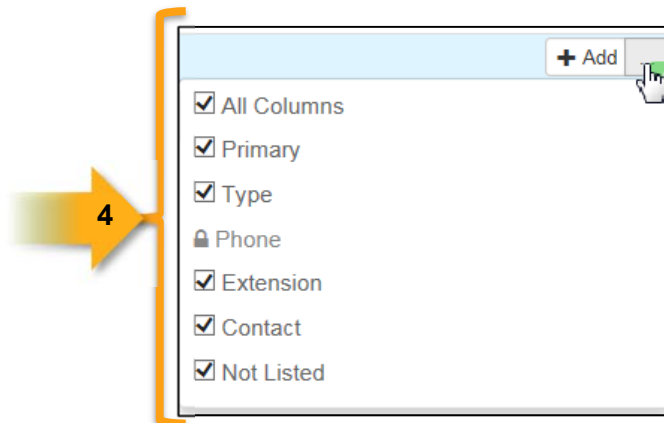
Grid information may be edited as follows:

1. To add a new record to the grid, click the **Add** button in the upper right of the grid title bar and type in the information when the blank line displays at the bottom of the grid.

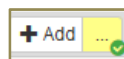


Line	Order	Lives With	Relation	Parent Name	Type	Phone	Contact Allowed	Ed. Rights	Has Custody	Mailings Allowed	Enrolling Parent	Release To	Financial Resp.	Deceased
1	1	<input checked="" type="checkbox"/>	Father	Aaron, Phillip	Cell	480-555-6767	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	3	<input checked="" type="checkbox"/>	Mother	Aaron, Kathleen	Home	480-555-1214	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

2. To delete a row, check the white box on the far left side of the record and click **Save**.
3. You may adjust which columns are displayed in the grid. Click the **Ellipsis** button in the top right of the grid title bar.
4. When the drop down menu displays, click to select the columns to display. Columns with a lock instead of a checkbox next to the name may not be hidden.

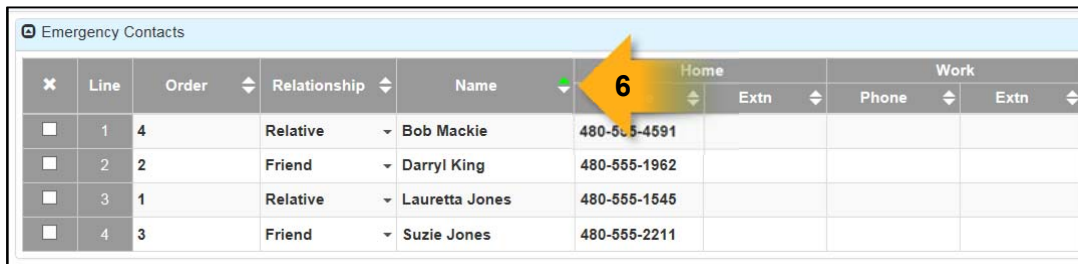


5. When there are columns hidden from view, the Ellipsis displays with a yellow background and a tiny check mark.



Note: Grids that have sort options are sorted by the first column of information by default, usually in ascending order. However, you may sort by any of the columns, in either ascending or descending order. Not all grids have sort options.

- To change the primary sort column for a grid, click the top arrow of the column to select it and sort in ascending order (smallest to largest, earliest to latest, A-Z).



✕	Line	Order	Relationship	Name	Home		Work	
					Phone	Extn	Phone	Extn
<input type="checkbox"/>	1	4	Relative	Bob Mackie	480-555-4591			
<input type="checkbox"/>	2	2	Friend	Darryl King	480-555-1962			
<input type="checkbox"/>	3	1	Relative	Lauretta Jones	480-555-1545			
<input type="checkbox"/>	4	3	Friend	Suzie Jones	480-555-2211			

- Click the bottom arrow of the column to select it and sort in descending order (largest to smallest, latest to earliest, Z to A).



✕	Line	Order	Relationship	Name	Home		Work	
					Phone	Extn	Phone	Extn
<input type="checkbox"/>	1	3	Friend	Suzie Jones	480-555-2211			
<input type="checkbox"/>	2	1	Relative	Lauretta Jones	480-555-1545			
<input type="checkbox"/>	3	2	Friend	Darryl King	480-555-1962			
<input type="checkbox"/>	4	4	Relative	Bob Mackie	480-555-4591			

Note: The current sort order is indicated by the selected triangle displaying bright green. The customized sort order is not saved, and the grid reverts to the default sort when changing screens or moving to another tab.

Using the Find Function to Display Data

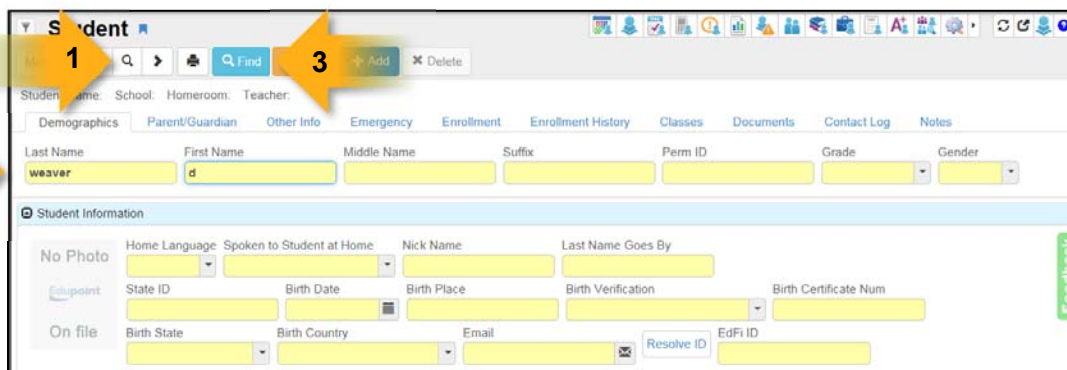
Synergy allows several ways to find student information such as:

- **Single** record search where you are able to search for and find a single student or class record
- **Multi** record search where you are able to find a list of records displayed in a matrix. **NOTE:** Default fields are **Last Name, First Name, Middle Name, and Perm ID.**
- **Filtered** search where you can filter data to look at only specific information or students.

Single Record Search

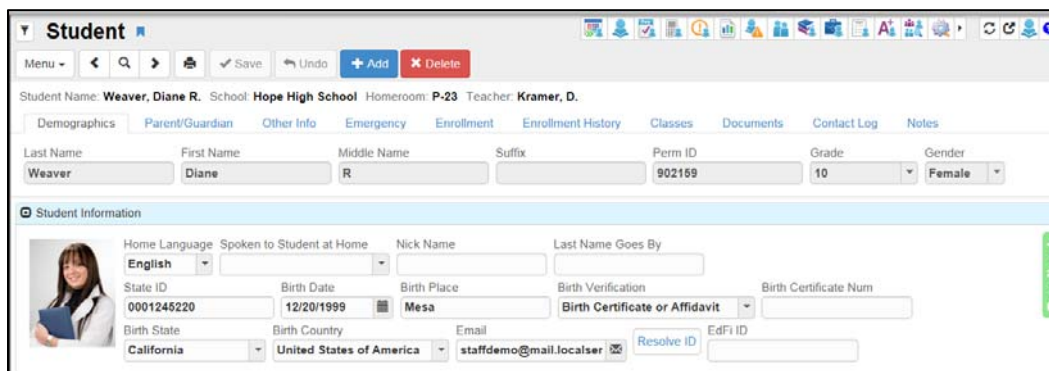
To perform a search for a single record:

1. Click the **Magnifying Glass** to enter **Find** mode. The search fields change to a yellow background display.
2. Type in partial or complete information within the field(s).
3. Click **Find** or press the **Enter** key on your keyboard.



The screenshot shows the 'Student' search interface. At the top, there is a search bar with a magnifying glass icon (1), a 'Find' button (3), and an 'Add' button. Below the search bar, there are several tabs: Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, Classes, Documents, Contact Log, and Notes. The search fields are highlighted in yellow and include: Last Name (weaver), First Name (d), Middle Name, Suffix, Perm ID, Grade, and Gender. Below the search fields, there is a 'Student Information' section with various fields for personal and contact information, including Home Language, Nick Name, Last Name Goes By, State ID, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, and EdFi ID. A 'Feedback' button is visible on the right side of the form.

Result:

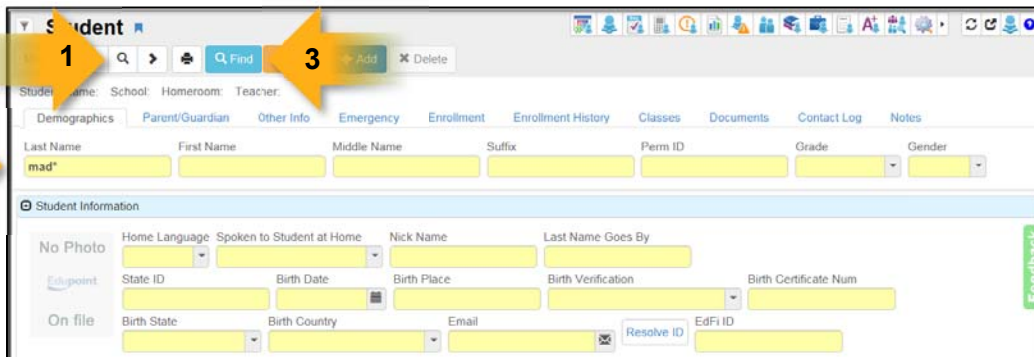


The screenshot shows the 'Student' search results for Diane R. Weaver. The student's name is 'Weaver, Diane R.', School is 'Hope High School', Homeroom is 'P-23', and Teacher is 'Kramer, D.'. The search fields are populated with the student's information: Last Name (Weaver), First Name (Diane), Middle Name (R), Suffix, Perm ID (902159), Grade (10), and Gender (Female). Below the search fields, there is a 'Student Information' section with various fields for personal and contact information, including Home Language (English), Nick Name, Last Name Goes By, State ID (0001245220), Birth Date (12/20/1999), Birth Place (Mesa), Birth Verification (Birth Certificate or Affidavit), Birth Certificate Num, Birth State (California), Birth Country (United States of America), Email (staffdemo@mail.localser), and EdFi ID. A 'Feedback' button is visible on the right side of the form.

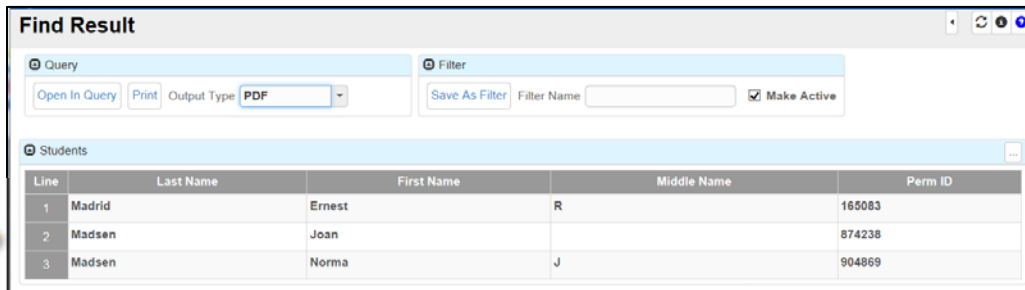
Multiple Record Search

To perform a search for multiple records:

1. Click the **Magnifying Glass** to enter **Find** mode.
2. Type in partial or complete information within the field(s) and add an asterisk(*).
3. Click **Find** or press **Enter** on your keyboard.



Result:



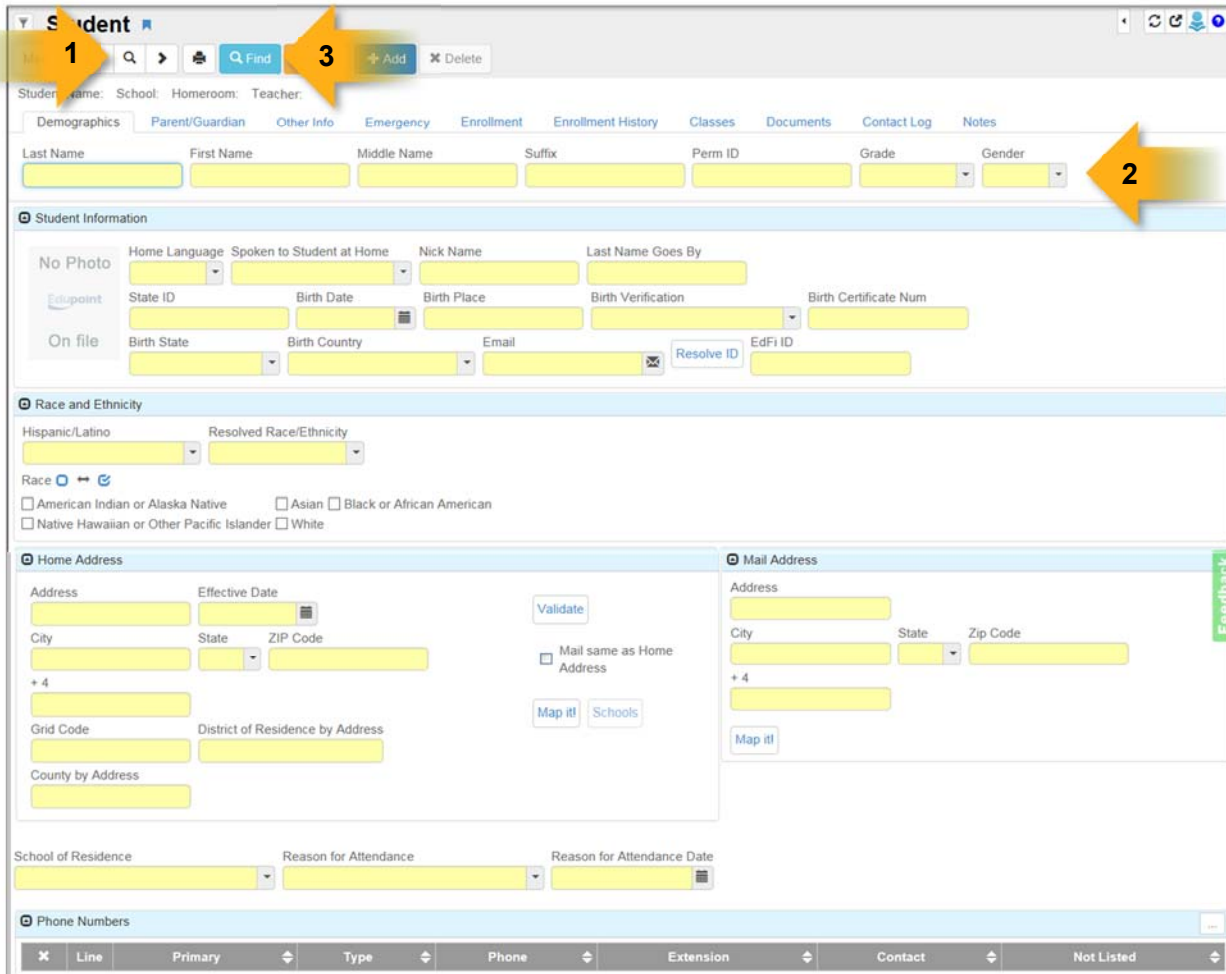
Line	Last Name	First Name	Middle Name	Perm ID
1	Madrid	Ernest	R	165083
2	Madsen	Joan		874238
3	Madsen	Norma	J	904869

4. Single-click the record to display the data on the Student screen. You may toggle between the Find Result window and Student screen in this scenario.
5. To select a record and close the **Find Result** window, double-click the desired record.

Matrix Search

A Matrix is a multi-field search that includes other fields besides the default fields. To perform a Matrix search:

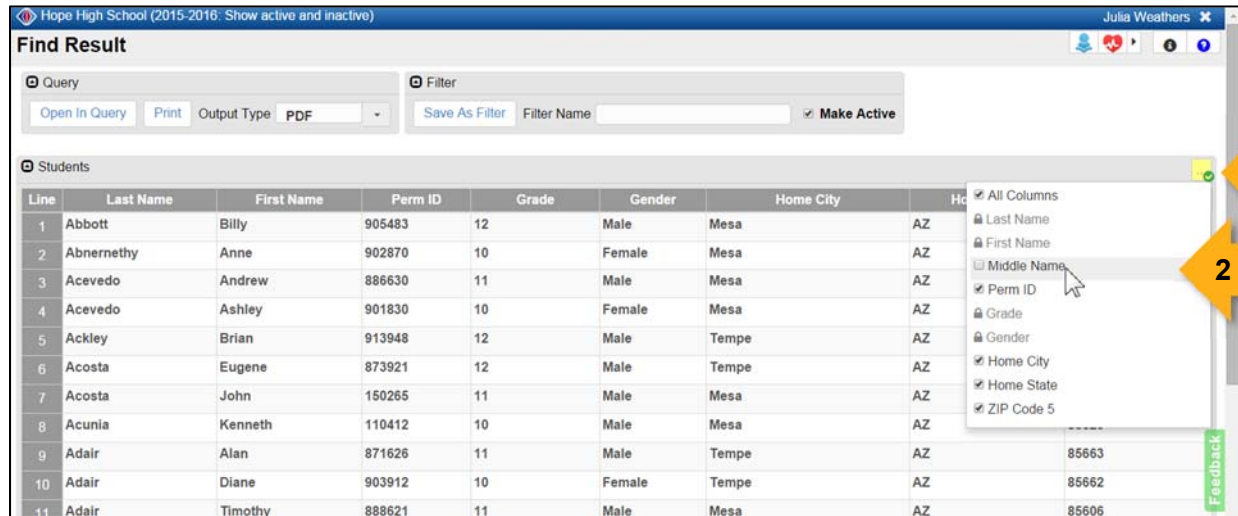
1. Click the **Magnifying Glass** to enter **Find** mode. All the available search fields display in yellow.
2. Type an asterisk (*) in any field that you want to include in your matrix. **Note: First Name, Middle Name, Last Name and Perm ID** are included in all **Find Mode** searches on this screen (**Student**). Other screens (such as **Section**) have different fields that are mandatory in the **Find** results. Type the asterisk (*) in any additional fields to include.
3. Click **Find**.



The screenshot shows the 'Student' page in the Synergy Student Information System. The search bar at the top contains a magnifying glass icon (labeled 1) and a 'Find' button (labeled 3). Below the search bar, the search fields are highlighted in yellow and labeled 2. The form is organized into several sections:

- Student Information:** Includes fields for Home Language, Spoken to Student at Home, Nick Name, Last Name Goes By, State ID, Birth Date, Birth Place, Birth Verification, Birth Certificate Num, Birth State, Birth Country, Email, and EdFi ID.
- Race and Ethnicity:** Includes a dropdown for Hispanic/Latino, a dropdown for Resolved Race/Ethnicity, and checkboxes for American Indian or Alaska Native, Asian, Black or African American, Native Hawaiian or Other Pacific Islander, and White.
- Home Address:** Includes fields for Address, Effective Date, City, State, ZIP Code, +4, Grid Code, District of Residence by Address, and County by Address. There are buttons for 'Validate', 'Map it!', and 'Schools'.
- Mail Address:** Includes fields for Address, City, State, ZIP Code, and +4. There is a button for 'Map it!'.
- Phone Numbers:** A table with columns for Line, Primary, Type, Phone, Extension, Contact, and Not Listed.

Result: A matrix of records displays that includes the selected fields (see below).



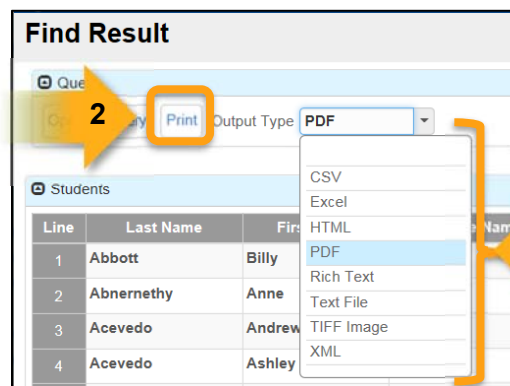
Using the **Ellipsis** button you may customize the display of the grid on the **Find Result** window.

1. Click the Ellipsis button.
2. Check the boxes of the columns you wish to hide on your display.

Printing or Exporting Matrix Find Results

When performing a Matrix search, you may print the search results:

1. Select an **Output Type** from the drop down menu – options include:
 - **CSV** (Comma Separated Value used by some 3rd party programs)
 - **Excel** (Takes the information directly into Excel format)
 - **HTML** (Hypertext Markup Language, identical to matrix find result)
 - **PDF** (Opens in Acrobat Reader or any PDF reader)
 - **Rich Text** (Opens in Word)
 - **Text File** (Tab separated fields used by some 3rd party programs)
 - **TIFF Image** (Picture of the first page)
 - **XML** (Programming syntax)
2. Click the **Print** button at the top of the screen.



**Using the Find Function to Display Data
Quick Reference Guide (QRG) NAV02**

For Example: Synergy SIS → Student → Student

How to:	Steps:
Single Record Search	<ul style="list-style-type: none"> ▪ Click the Magnifying Glass to enter the Find mode. The search fields change to a yellow background display. ▪ Type in partial or complete information within the field(s). ▪ Click Find or Enter for results. ▪ Use the arrows to either side of the magnifying glass to scroll to another record.
Multiple Record Search	<ul style="list-style-type: none"> ▪ Click the Magnifying Glass to enter the Find mode. The search fields change to a yellow background display. ▪ Type in partial or complete information within the field(s) and add an asterisk (*). Or an asterisk (*) can be put into a field to search all. ▪ Click Find or Enter for results. ▪ A new screen called Find Result will appear. Single clicking on a line number will open in the Student screen and leave the results open. Double clicking will open in the Student screen and close the results.
Matrix Search	<ul style="list-style-type: none"> ▪ Click the Magnifying Glass to enter the Find mode. The search fields change to a yellow background display. ▪ Type an asterisk (*) in any field that you want to include in your matrix. Note: First Name, Middle Name, Last Name and Perm ID are included in all Find Mode searches on this screen (Student). Other screens (such as Section) have different fields that are mandatory in the Find results. Type the asterisk (*) in any additional fields to include ▪ Click Find. ▪ A Find Result matrix of records displays that includes the selected fields. Using the Ellipsis button allows for a customized display on the grid.

**Printing or Exporting
Matrix Results**

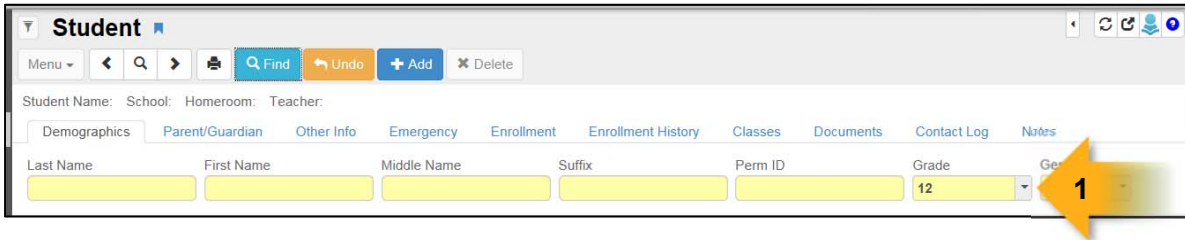
- **Print** or **Export** Find Result by selecting an Output Type from the drop down menu. Options include:
 - **CSV** (Comma Separated Value used by some 3rd party programs)
 - **Excel** (Takes the information directly into Excel format)
 - **HTML** (Hypertext Markup Language, identical to matrix find result)
 - **PDF** (Opens in Acrobat Reader or any PDF reader)
 - **Rich Text** (Opens in Word)
 - **Text File** (Tab separated fields used by some 3rd party programs)
 - **TIFF** Image (Picture of the first page)
 - **XML** (Programming syntax)
- Click the **Print** button at the top of the screen.

Using Filters

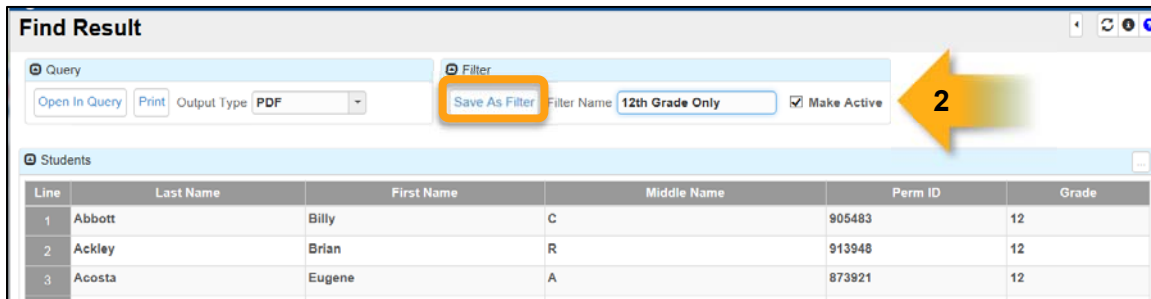
The **Find Mode** may also be used to create a filter to be applied on a screen. When a filter is applied, only the data that satisfy the filter criteria will display. A screen filter can make scrolling through records much faster. A single user may have an unlimited number of filters saved in the filter drop-down menu. More than one filter may be active, as long as they do not conflict.

Creating a Filter

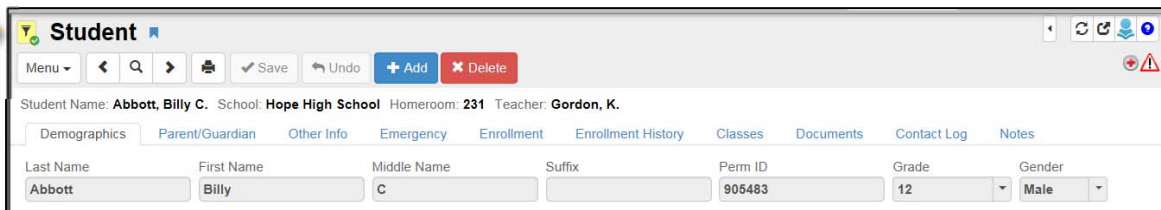
System Filters are created from the **Matrix** view using the **Save as Filter** button.




1. On your screen, (**Student** in this example), enter the search criteria and click **Find**.




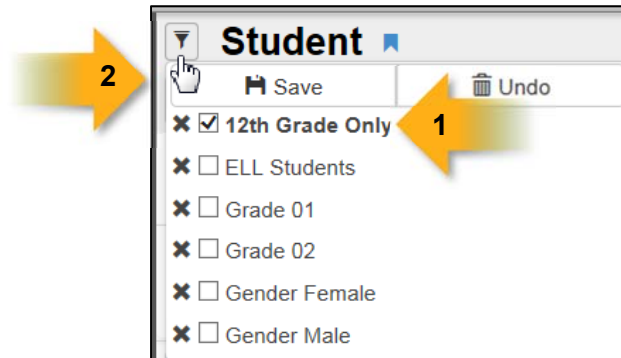
2. When the **Find Result** screen displays, enter a **Filter Name**, click **Save As Filter**.



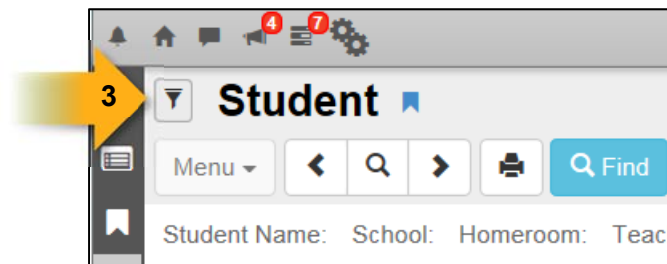
3. The filter is applied and the filter icon displays as yellow with the green checkmark - . (**Note:** All functions performed while the filter is active will only include those students that are part of the active filter.)

Inactivating a Filter

To inactivate the filter, click the Filter icon -  - to show the **Select Filters** list. This is a list of all the filters this user has previously saved.

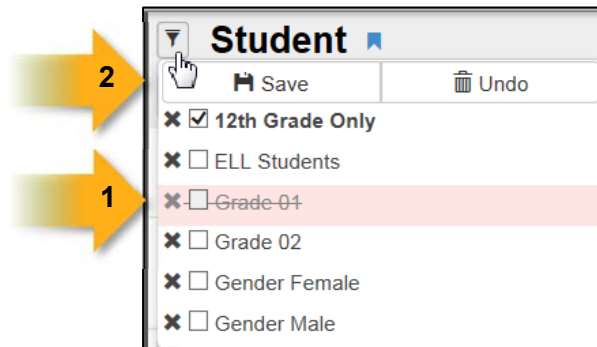


1. Filters with a checkmark in the box are currently active. Uncheck the box to deactivate the filter.
2. Click **Save**. This action saves and closes the **Select Filters** List.



3. The **Filter** icon is grayed out when inactive. Click the icon at any time to view the **Select Filters** list.



Deleting Inactive Filters




1. Click the **X** to select the filter to delete. The screen displays with your selected action highlighted in pink.
2. Click **Save** to complete the action. The screen refreshes and the deleted filter is removed from the list.

Using Filters Quick Reference Guide (QRG) NAV03

For Example: Synergy SIS → Student → Student

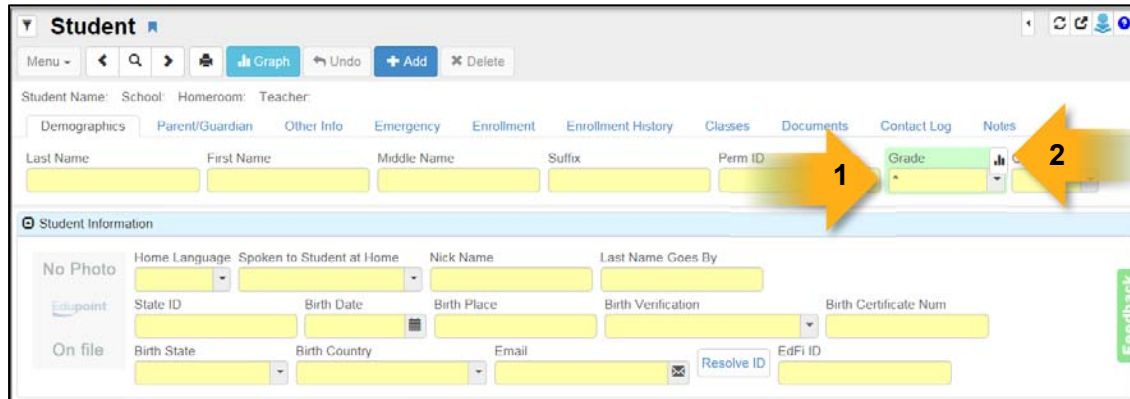
How to:	Steps:
<p>Create a Filter</p>	<ul style="list-style-type: none"> ▪ Click the Magnifying Glass to enter the Find mode. The search fields change to a yellow background display. ▪ Type an asterisk (*) in any field that you want to include in your matrix. Note: First Name, Middle Name, Last Name and Perm ID are included in all Find Mode searches on this screen (Student). Other screens (such as Section) have different fields that are mandatory in the Find results. Type the asterisk (*) in any additional fields to include ▪ Click Find. ▪ When the Find Result screen displays, enter a Filter Name, click Save As Filter. ▪ The filter is applied and the filter icon displays as yellow with the green checkmark .  (Note: All functions performed while the filter is active will only include those students that are part of the active filter.) ▪
<p>Inactivating a Filter</p>	<ul style="list-style-type: none"> ▪ To inactivate the filter, click the Filter icon -  - to show the Select Filters list. A list of all the filters the user has previously saved will show. ▪ Filters with a checkmark in the box are currently active. Uncheck the box to deactivate the filter ▪ Click Save. This action saves and closes the Select Filters List. ▪ The Filter icon is grayed out when inactive. Click the icon at any time to view the Select Filters list


Deleting Inactive Filters

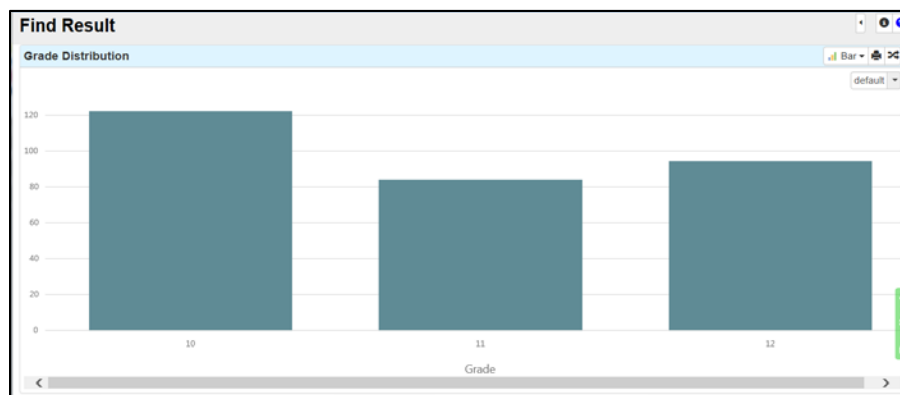
- . To delete the filter, click the Filter icon -  - to show the **Select Filters** list. A list of all the filters the user has previously saved will show.
- Click the **X** to select the filter to delete. The screen displays with your selected action highlighted in pink.
- Click **Save** to complete the action. The screen refreshes and the deleted filter is removed from the list.

Creating Graphs

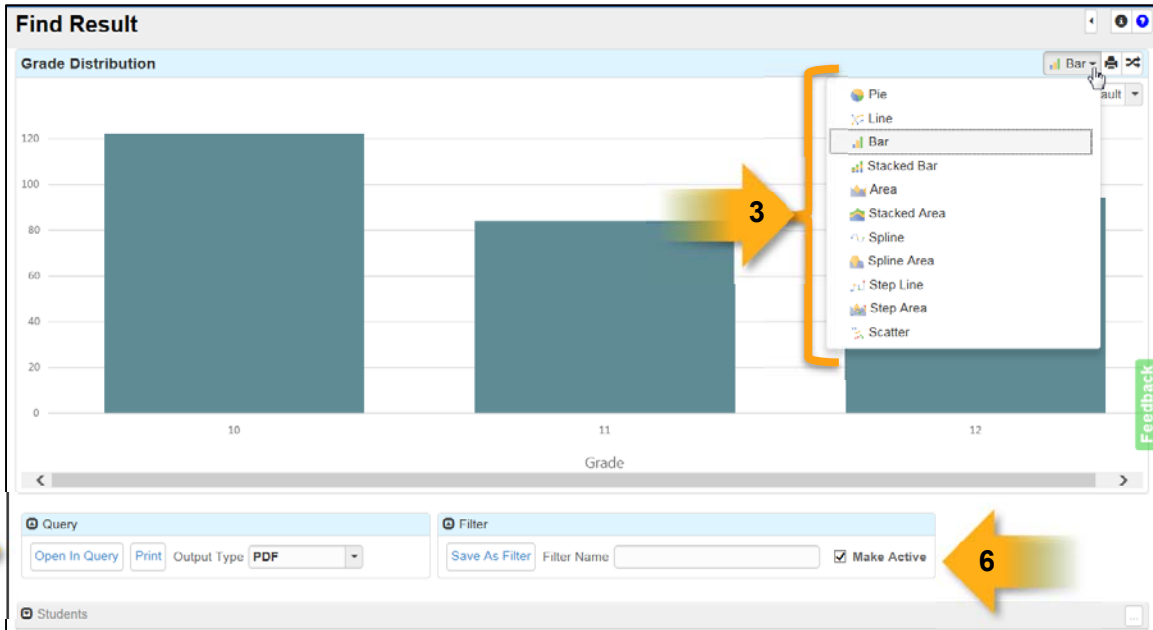
In Synergy you may quickly create graphs to view data in a visual format.




1. Enter an asterisk in the **Find** field to graph. In this example we will graph the **Grade** field data.
2. Click on the **Toggle Graph Mode** icon  to display the **Find Result** screen. **Note:** The first time default is the **Bar Chart**. Any field you graph subsequently will display your last chart type selection as the default (see below).



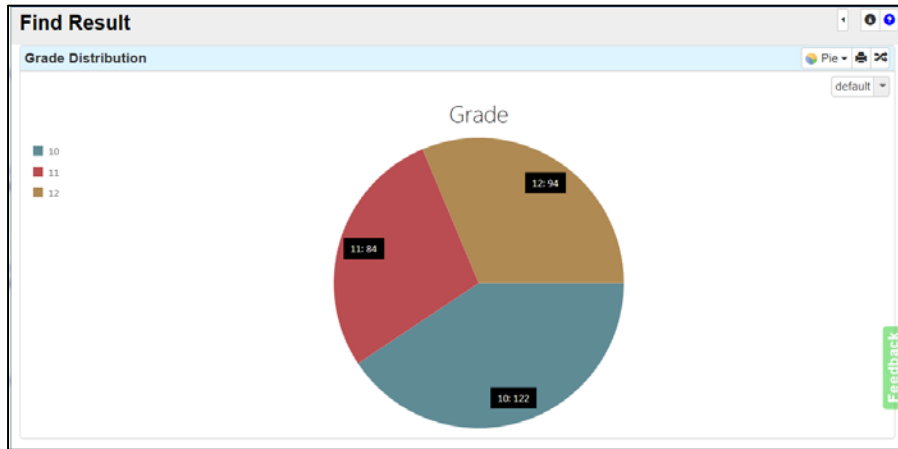
- To change the chart type, click the **Graph** drop-down and select a new type from the menu.





- To **Print** the find results, select the Output Type from the drop-down in the **Query** group box and click **Print**.
- Click **Open in Query** to view your query in the **Query** screen.
- To save as a screen filter, enter the **Name** in the **Filter Name** field and click **Save As Filter**.
- To view a list of students that are included in the graph results, click the down arrow on the right side of the **Students** group box.
- Click the  icon to view the list of columns that are included in your results grid. To hide any columns, uncheck the box next to the column name.

Line	Last Name	First Name	Middle Name	Perm ID	Grade
1	Abbott	Billy	C	90548	
2	Abnernethy	Anne	Elizabeth	90287	
3	Acevedo	Andrew		88663	
4	Acevedo	Ashley		90183	
5	Ackley	Brian	R	913948	12
6	Acosta	Eugene	A	873921	12

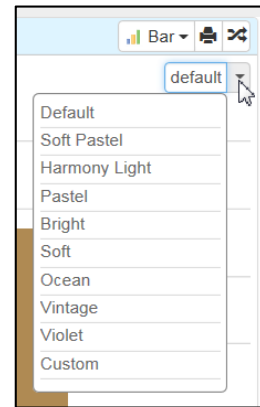
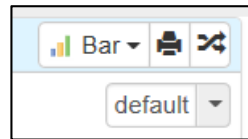
Another commonly used chart type is the **Pie** chart, shown here.



To print the chart, click the  icon.

To Invert Series Results, click the  icon.

To change the color schemes, click the default drop down.



Generating Reports

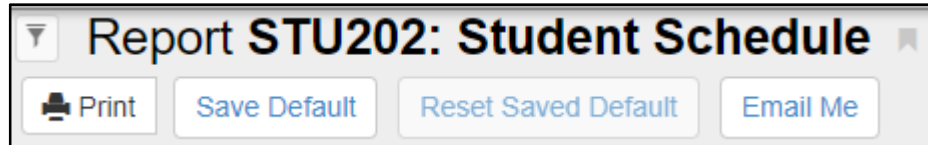
Reports may be found on the **PAD Tree**. For example: **Student > Reports > List**. There are different kinds of reports as follows:

- **Individual** reports are single student reports usually listed as a 200 series.
- **List** reports are lists of students, classes, etc. and are usually listed as a 400 series.
- **Summary** reports are items summarized by numbers and are usually listed as a 600 series.
- **Labels** are mailing labels, grading labels, etc. and are usually listed as an 800 series.

Each report has a **Report Interface** screen to allow you to select data options desired for the report. The **Report Interface** has five tabs that include **Options**, **Sort/Output**, **Conditions**, **Selection**, and **Advanced**.

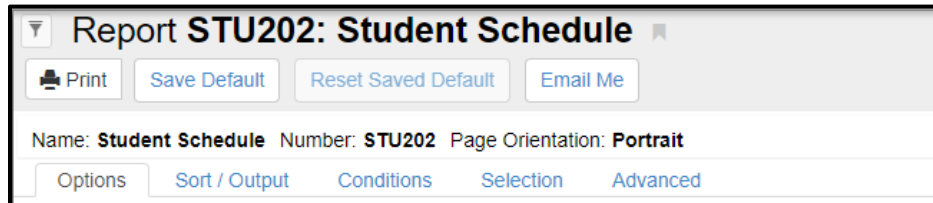
Using the Report Interface Buttons

Each **Report Interface** has four buttons as follows:



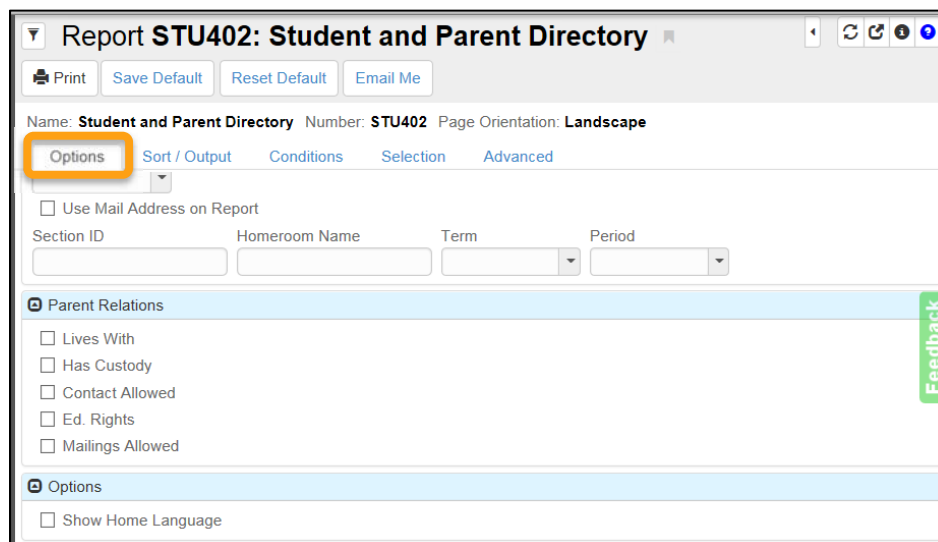
- **Print** – Click **Print** to execute the report. **NOTE:** Reports do **NOT** automatically go to a default printer but are displayed on the screen in the format chosen on the Sort/Output tab.
- **Save Default** – Click **Save Default** to save a default set up for the Report Interface you are currently using.
- **Reset Saved Default** – Click **Reset Saved Default** to reset a report interface back to the original Synergy SIS defaults.
- **Email Me** – Click **Email Me** to email the report to your email address that is entered into the **Synergy SIS**.

Selecting Options – Options Tab



The screenshot shows the top portion of the 'Report STU202: Student Schedule' interface. At the top, there are buttons for 'Print', 'Save Default', 'Reset Saved Default', and 'Email Me'. Below these, the report details are displayed: 'Name: Student Schedule', 'Number: STU202', and 'Page Orientation: Portrait'. A navigation bar at the bottom contains five tabs: 'Options', 'Sort / Output', 'Conditions', 'Selection', and 'Advanced'.

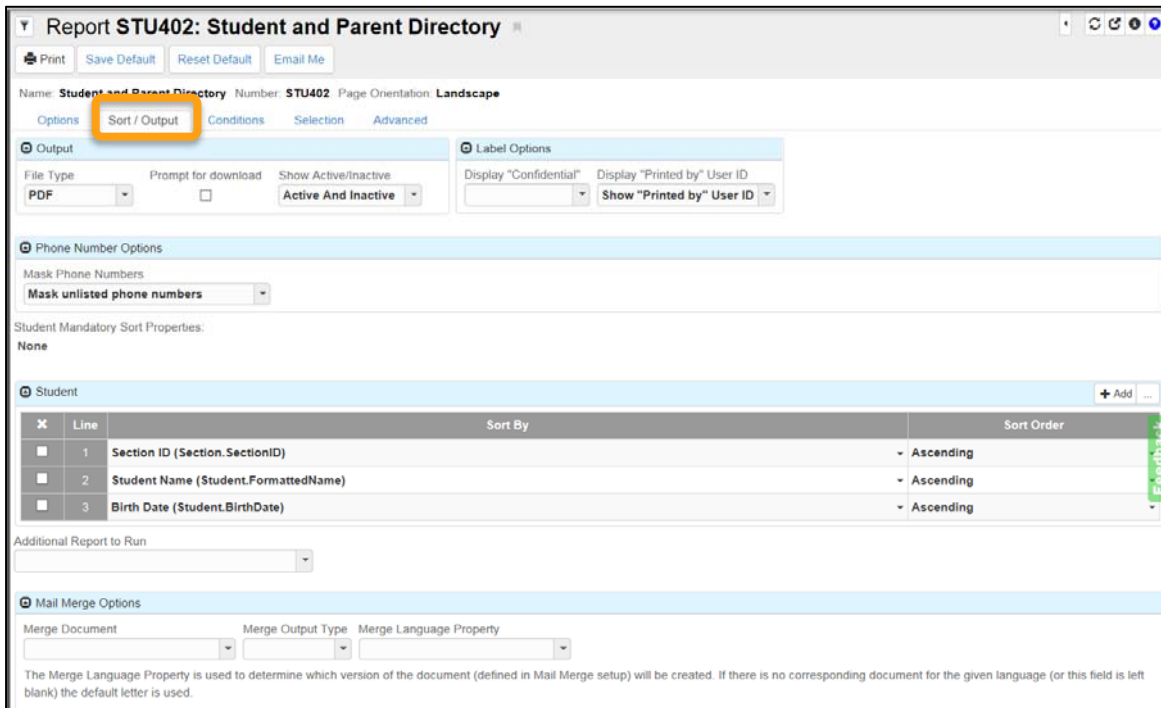
The **Options** tab allows you to select set criteria for your report. Each Report Interface has different options relating to the report output.



The screenshot shows the 'Options' tab for the 'Report STU402: Student and Parent Directory'. The interface includes buttons for 'Print', 'Save Default', 'Reset Default', and 'Email Me'. The report details are 'Name: Student and Parent Directory', 'Number: STU402', and 'Page Orientation: Landscape'. The 'Options' tab is highlighted with an orange box. Below the navigation bar, there is a dropdown menu and a checkbox labeled 'Use Mail Address on Report'. Further down, there are input fields for 'Section ID', 'Homeroom Name', 'Term', and 'Period'. Two expandable sections are visible: 'Parent Relations' with checkboxes for 'Lives With', 'Has Custody', 'Contact Allowed', 'Ed. Rights', and 'Mailings Allowed'; and 'Options' with a checkbox for 'Show Home Language'. A vertical 'Feedback' button is located on the right side of the 'Parent Relations' section.

Selecting Sorting & Output – Sort/Output Tab

The **Sort/Output tab** allows you to select how the report will be displayed when printed.



Report STU402: Student and Parent Directory

Print Save Default Reset Default Email Me

Name: Student and Parent Directory Number: STU402 Page Orientation: Landscape

Options Sort / Output Conditions Selection Advanced

Output

File Type: PDF Prompt for download Show Active/Inactive: Active And Inactive

Label Options

Display "Confidential": Display "Printed by" User ID

Phone Number Options

Mask Phone Numbers: Mask unlisted phone numbers

Student Mandatory Sort Properties: None

Student

X	Line	Sort By	Sort Order
■	1	Section ID (Section.SectionID)	Ascending
■	2	Student Name (Student.FormattedName)	Ascending
■	3	Birth Date (Student.BirthDate)	Ascending

Additional Report to Run

Mail Merge Options

Merge Document Merge Output Type Merge Language Property

The Merge Language Property is used to determine which version of the document (defined in Mail Merge setup) will be created. If there is no corresponding document for the given language (or this field is left blank) the default letter is used.

On this tab you may select:

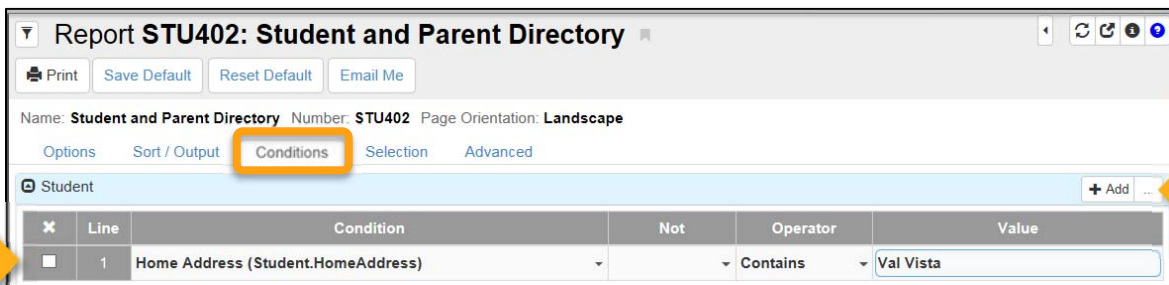
1. **File Type** – also known as Output Type
2. **Show Active/Inactive** – Active, Inactive or Active and Inactive students on the report
3. **Display "Confidential"** – Displays the word Confidential in **Red** in the Header, Footer or both Header and Footer
4. **Display "Printed by" User ID** – Show or Hide "Printed by" with the User ID
5. **Mask Phone Numbers** – Show or Mask unlisted phone numbers with ###
6. **Sort By** – Sort the report by the default sort or select your own sort options
7. **Additional Reports to Run** – Run additional reports such as labels
8. **Mail Merge Options** – Merge the report onto a mail merge document

Adding Extra Conditions – Conditions Tab

The **Conditions tab** allows you to add extra conditions to your report to limit the printed output.

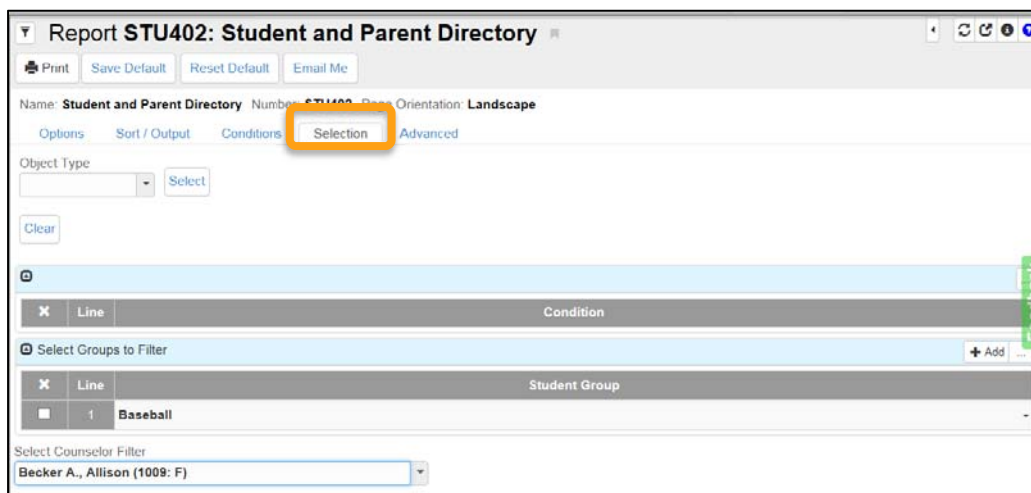
To add a condition:

1. Click **Add**.
2. Select a **Condition** from the drop down menu.
3. Enter **Not** if you want to print information that is not included in the value
4. Enter the **Operator** from the drop down menu. Operators include Contains, Equal To, Ends With, Greater or Equal, Greater Than, In List, Less Than or Equal, Less Than, and Starts With.
5. Type a **Value** for the Condition



Adding Selections – Selection Tab

The **Selection tab** allows you to select specific **Students**, **Groups** of students or a specific **Counselor's** students.



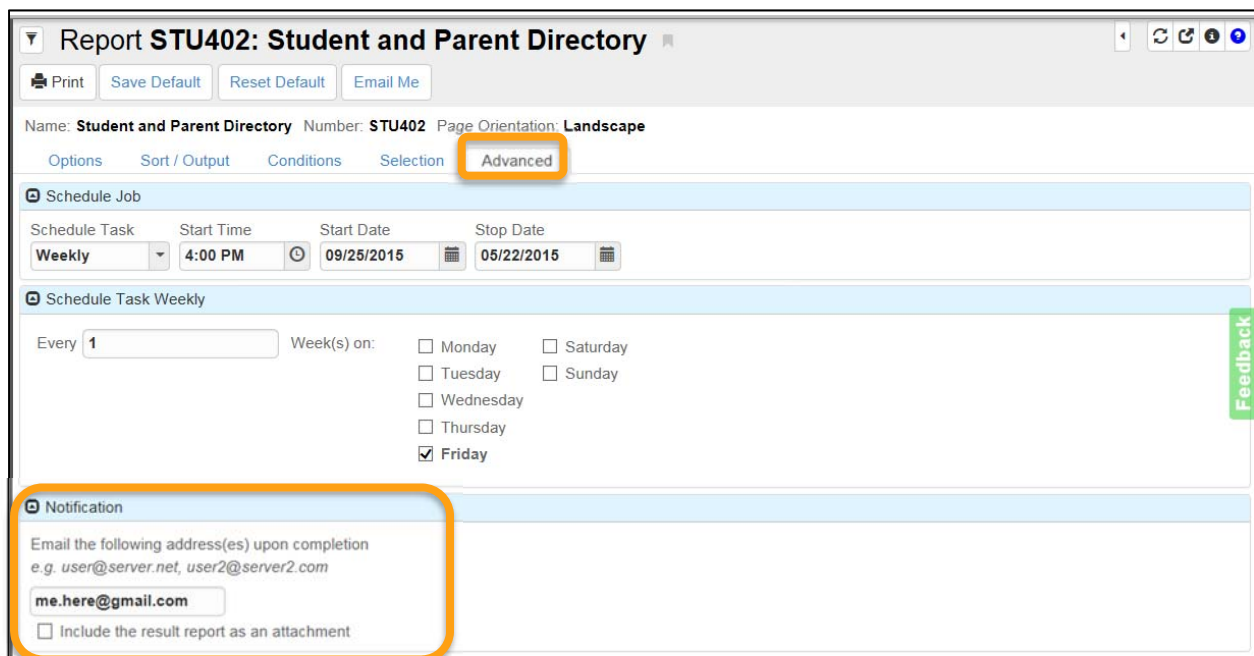
Scheduling Reports as Jobs – Advanced Tab

The **Advanced** tab allows you to schedule the report as a job to be run at a later time if needed.

Schedule Job may be:

- **Once** – run immediately
- **Daily** – run every day or a specific interval of time
- **Weekly** – run every week day or specific days of the week
- **Monthly** – run specific months of the year and/or on a specific day of the month
- **Notification** – allows you to send email notification that the report has run. Be sure to **include the report as an attachment** to the email

NOTE: Make sure to enter a **Start Date** AND **Stop Date** otherwise the report will continue to run even when there is no data for it to produce.



Report **STU402: Student and Parent Directory**

Print Save Default Reset Default Email Me

Name: **Student and Parent Directory** Number: **STU402** Page Orientation: **Landscape**

Options Sort / Output Conditions Selection **Advanced**

Schedule Job

Schedule Task	Start Time	Start Date	Stop Date
Weekly	4:00 PM	09/25/2015	05/22/2015

Schedule Task Weekly

Every Week(s) on:

Monday Saturday
 Tuesday Sunday
 Wednesday
 Thursday
 Friday

Notification

Email the following address(es) upon completion
 e.g. user@server.net, user2@server2.com


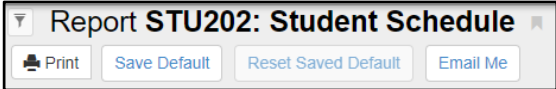
Include the result report as an attachment

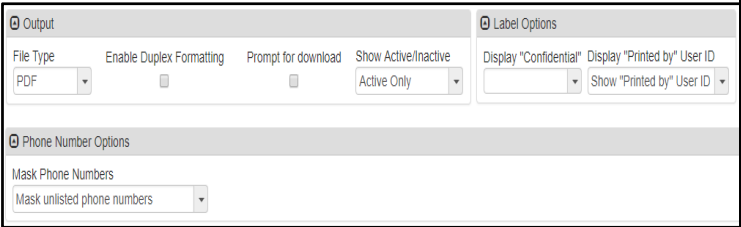
Notification - If a job is scheduled you have the ability to Email it to yourself and/or others by putting the email address in the notification area. Be sure to check **the Include the result report as an attachment**.

When a report or job is running a status box displays. When the report or job is completed it is displayed on the screen or located in the **Job Queue Viewer** for reviewing at a later time.

Creating Graphs and Generating Reports Quick Reference Guide (QRG) NAV04

For Example Synergy SIS → Student → Student

How to:	Steps:
<p>Creating Graphs</p>	<ul style="list-style-type: none"> ▪ Enter an asterisk in the Find field to graph. For example, the Grade field data. ▪ Click on the Toggle Graph Mode icon  to display the Find Result screen. Note: The first time default is the Bar Chart. Any field that is graphed subsequently will display the last chart type selection as the default ▪ To change the chart type, click the Graph drop-down and select a new type from the menu. ▪ To Print the find results, select the Output Type from the drop-down in the Query group box and click Print
<p>Report Types</p>	<ul style="list-style-type: none"> ▪ Individual reports are single student reports usually listed as a 200 series. ▪ List reports are lists of students, classes, etc. and are usually listed as a 400 series. ▪ Summary reports are items summarized by numbers and are usually listed as a 600 series. ▪ Labels are mailing labels, grading labels, etc. and are usually listed as an 800 series.
<p>Report Interface</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">  </div> <ul style="list-style-type: none"> ▪ Print – Click Print to execute the report. NOTE: Reports do NOT automatically go to a default printer but are displayed on the screen in the format chosen on the Sort/Output tab. ▪ Save Default – Click Save Default to save a default set up for the Report Interface you are currently using. ▪ Reset Saved Default – Click Reset Saved Default to reset a report interface back to the original Synergy SIS defaults. ▪ Email Me – Click Email Me to email the report to your email address that is entered into the Synergy SIS.

<p>How to:</p>	<p>Steps:</p>
<p>Options Tab</p>	<ul style="list-style-type: none"> ▪ The Options tab allows specific criteria to be selected for each report. ▪ Choose the desired Options for the report by checking the box or from the drop down. In most cases, choosing nothing will populate everything.
<p>Sort/Output Tab</p>	<div data-bbox="716 541 1453 766" style="border: 1px solid gray; padding: 5px; margin-bottom: 10px;">  </div> <ul style="list-style-type: none"> ▪ The Sort/Output tab allows for the choice of how the report will be displayed when printed. ▪ The options are: <ul style="list-style-type: none"> • File Type – also known as Output Type • Show Active/Inactive – Active, Inactive or Active and Inactive students on the report • Display “Confidential” – Displays the word Confidential in Red in the Header, Footer or both Header and Footer • Display “Printed by” User ID – Show or Hide “Printed by” with the User ID • Mask Phone Numbers – Show or Mask unlisted phone numbers with ### • Sort By – Sort the report by the default sort or select your own sort options • Additional Reports to Run – Run additional reports such as labels • Mail Merge Options – Merge the report onto a mail merge document • Attach PDF to Student – Attaches the report to the student documents tab with the Document Category and Doc Comment chosen.

<p>Conditions Tab</p>	<ul style="list-style-type: none"> ▪ The Conditions tab allows additional conditions to be added to a report to limit the printed output. ▪ To add a condition: <ul style="list-style-type: none"> • Click Add. • Select a Condition from the drop down menu. • Enter Not if you want to print information that is not included in the value • Enter the Operator from the drop down menu. Operators include Contains, Equal To, Ends With, Greater or Equal, Greater Than, In List, Less Than or Equal, Less Than, and Starts With. • Type a Value for the Condition
<p>Selection Tab</p>	<ul style="list-style-type: none"> ▪ The Selection tab allows the selection of specific Students, Groups of students, specific Counselor's or Administrator's of students to be chosen.
<p>Advanced Tab</p>	<ul style="list-style-type: none"> ▪ The Advanced tab allows for a job to be scheduled to run at a later time if needed. ▪ Schedule Job may include: <ul style="list-style-type: none"> • Once – run immediately • Daily – run every day or a specific interval of time • Weekly – run every week day or specific days of the week • Monthly – run specific months of the year and/or on a specific day of the month • Notification – allows you to send email notification that the report has run. Be sure to include the report as an attachment to the email <ul style="list-style-type: none"> ▪ NOTE: Make sure to enter a Start Date AND Stop Date otherwise the report will continue to run even when there is no data for it to produce. ▪ A Notification can be set to Email the job with completed. Enter the Email addresses desired and check the Include the result report as an attachment box.

Self-Assessment Checklist

When attendees complete Navigation training they will be able to:

- Log In to Synergy and Navigate the Synergy Interface
- Use and Understand Synergy Concepts and Terminology
- Change Focus to view other years/schools as allowed by the district
- Create Personal Navigation Menus
 - Using the drag and drop method
 - Using the right click method
- Create Quick Nav Menus
 - Using the Navigation Menu
 - Using the Navigation Tree
- Navigate to Synergy screens quickly
 - Using the Navigation Panel
 - Using the Product Access Definition Tree Panel
 - Using the Bookmarks Panel
 - Using the History Panel
 - Using Quick Launch
 - Using the Quick Nav Bar
- Use the Student Screen to view basic information
- Find a Single Student
- Find Multiple Students in a matrix
 - Select students from a matrix
 - Print student data from a matrix
 - Use a matrix to export student information to other desktop programs
- Create student filters
 - Use created filters
 - Delete created filters
- Create Graphs using Synergy data
- Preview and print reports using the Report Interface
 - Save Report Setting
 - Reset Report Settings
 - Email Reports
- Use the Job Queue Viewer