

Synergy SIS[©] Query & Reporting Guide



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ABOUT THIS GUIDE

Document History

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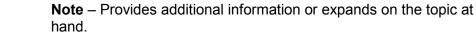
CONVENTIONS USED IN THIS GUIDE

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



Bold Text

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





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



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

NAVIGATION

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

ESD ESD
Synergy SE
🗢 Synergy SIS
Accommodations
Attendance
Course
Course History
Discipline Incident
ESR
Federal
Fees
Grade Book
Grading
Health
Locker
Mass Scheduling
Parent
🗢 Query
🔍 Query
🐴 Query Admin
Synergy SIS Navigation Tree

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



BEFORE YOU BEGIN

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



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

Chapter One: OVERVIEW

In this chapter, the following topics are covered:

Overview of querying and reporting

OVERVIEW OF QUERYING & REPORTING

Synergy SIS offers numerous pre-defined reports that you can customize to some degree at the time of printing. Options that are specific to each report are described in the Synergy SIS guide for the subject matter of the report. Options that are common to all reports are described in this guide.

✓Report Interface		0
Name: Permanent Record Number: REC201 Page Orientation: Portrait		~
Options Sort / Output Conditions Selection Advanced		
Output	Label Options	
File Type Prompt for download Show Active/Inactive	Display "Confidential"	
PDF Active Only		
Phone Number Options	~	
Mask Phone Numbers Mask unlisted phone numbers		
Student Mandatory Sort Properties:		
Student	Add	
X Line Sort By	Sort Order	
1 Last Name (Student.LastName)	✓ Ascending ✓	
2 First Name (Student.FirstName)	Ascending	
Middle Name (Student.MiddleName)	✓ Ascending ✓	
Perm ID (Student.SisNumber)	✓ Ascending ✓	
Additional Report to Run		
×		
Mail Merge Options		6
Merge Document Merge Output Type Merge La	anguage Property	
× ×	*	
The Merge Language Property is used to determine which versior		
created. If there is no corresponding document for the given langu	uage (or this field is left blank) the default letter is used	
Attach PDF To Students		4
Attach To Student Document Category Doc C	Comment	

Figure 1.1 – Report Interface

In addition to pre-defined reports, Synergy SIS offers several ways to create custom reports. This guide shows how the Find mode function on each screen can act as a quick report writer. It also covers the **Query** screen and the types of reports it can create.

Save Open Execute Delete	Clear All Save as Re	port				Sta	atus: Ready	30
√Query								4
Start Here! Enter the details about	your query:							6
Name	Group	Туре		Output ⁻	Туре	Orientation	Туре	
		 Select 	:t	HTML	*	Portrait	✓ New	
Description 🕎 📀					w Resu	Its To Be Edite	d	
Columns Conditions Sort Typ	e in Query							
Step 1. Select the Business Objects	5	٨	Objects	Action	- 🕥	Step 2. Select	t the Properties	
Line Name						Line Name	Туре	
CareerPlan (K12.GradeInfo.G	radRe)							
2 CareerPlanCourseGroup (K12	2.GradeInfo.GradRe)						
3 Course (K12.CourseInfo)								
4 CourseGridSource (K12.WSC	.StateReporti)							
5 CourseProcessList (K12.WSC	.StateReporti)							
6 CourseSectionGridSource (K1	12.WSC.StateReport	i)						
7 CourseSectionProcessList (K*	12.WSC.StateReport	ti)						
8 CTEParticipantExtract (K12.C)	TE.Reports)							
9 CTEProgram (K12.CourseInfo))							
10 Dwelling (K12.Census)								
1 <u>2</u> <u>3</u> <u>4</u> <u>5</u> <u>6</u> <u>7</u> <u>8</u> (»				L	Show All Pro	operties		
Show All Business Objects								
Add Literal								
Step 3. Provide any desired proper	rty overrides							
X Line Name Label Override	Order	Width	Hide	Group	Break	Display	Aggregate	

Figure 1.2 – Query Screen

Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in the **Job Queue Viewer** and the **Job Q Adm Viewer**. The **Job Queue Viewer** lists all of the jobs that have been submitted by the user currently logged in to Synergy SIS. The **Job Q Adm Viewer** lists all jobs regardless of user. Both of these screens are covered in Chapter Six.

\mathbb{V}	Job	Q Adm	۷	iewer										
	rent (
Job I	Job ID Begin Date End Date State Server Name Show Recurring User Name 🔶													
	Delete Jobs State Selection v													
Job	s in Q	ueue										S	how Det	ail 🕥
×		Submit Dt		Completed 🔶	Total Time	Job ID 🛛 🈂	Priority		State 🔶	Description 🔶	Process Server Machine Name		ser ame	Result
		06/29/2011 13:02:04		06/29/2011 13:02:22	00:00:17	District Mass Sync Job ID	Normal	~		District Mass Synchronize Grade Book	QAWEB14		<u>lob</u> /ilson	
	2	06/29/2011 12:58:40		06/29/2011 12:59:14	00:00:33	District Mass Sync Job ID	Normal	*		District Mass Synchronize Grade Book	QAWEB14		<u>lob</u> /ilson	
		05/01/2011 22:16:09		05/01/2011 22:16:17	00:00:06	ATP410	Normal	*		Summer Attendance Report	SRV-TSCFILES		<u>dmin</u> ser	
		05/01/2011 22:05:51			N/A	ATP603	Normal	~	STOP	Positive Attendance Summary	SRV-TSCFILES		dmin ser	P
		05/01/2011 21:46:11		05/01/2011 21:46:19	00:00:07	STU409	Normal	~		Class Roster	SRV-TSCFILES		dmin ser	
		05/01/2011 21:41:52		05/01/2011 21:42:07	00:00:14	STU409	Normal	*		Class Roster	SRV-TSCFILES		. <u>dmin</u> ser	

Figure 1.3 – Job Q Adm Viewer

Users who create queries that might be useful for other users can nominate those queries to be shared as public queries. The public queries can be managed and reviewed using the **Query Admin** screen explained in Chapter Six.

∇	√Query Admin									
Que	ry Ad	min								
Pul	olic Q	ueries	Nominated Queries							
Filt	er Pro	perties	;							
Gro	Group Type Include Product Owned									
All	Public	: Queri	es							٥
×	Line	Open	Name	Description		Туре	Output Type	User Name	Product Owned	Group
	1	Open	40th Day Audits	Audit Services will use this list to verify	•	Select 💌	PDF 🚩	Weathers, Bob	No	Miscellaneous 👻
	2	Open	5th/6th Grade Varice	This report will list all 5th and 6th Grade students	•	Select 💌	PDF 💌	Weathers, Bob	No	Health 💌
		Open	6th Grade Labels	Labels for 6th grade students going to Jr.	•	Select 💌	PDF 🚩	Wilson, Rob	No	Label 💌
		Open	7th Grade Labels	EXAMPLE STATES FOR 7th grade Students by previous	•	Select 💌	PDF 🚩	Wilson, Rob	No	Miscellaneous 👻
	5	Open	9th Grade Health Co	₩ OLists only 9th grade student with health	•	Select 💌		Weathers, Bob	No	Health 💌

Figure 1.4 – Query Admin Screen

Users can create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Chapter Four of this guide). The structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree) can can be managed through the **UD PAD Definition** screen, as described in Chapter Six.

VUD PAD Definition					(«
PAD Definition					
User PAD Tree	 		 Action	•	٩
Student					
		UD DAD Definition Orman			

Figure 1.5 – UD PAD Definition Screen

This guide also reviews the reports available for the Job Queue and outlines the security options available for the **Job Queue Viewer**, the **Job Q Adm Viewer**, the **Query** screen, and the **Query Admin** screen.



Note: A user's ability to create and save a report is subject to the security restrictions set up by the district.

Chapter Two: REPORTS

In this chapter, the following topics are covered:

- ► How to change a report's sort & output options
- ► How to filter a report
- ► How to schedule a report

Synergy SIS offers numerous pre-defined reports that can be customized at the time of printing.

Almost every report has a set of options that are specific to that report. The report-specific options are listed on the **Options** tab of the **Report Interface**. Each of these report-specific options is outlined in the Synergy SIS guide relating to the report.

You can save the options selected as the default options for that report by clicking the **Save Default** button. This saves the selections on the **Options** tab only, and these options are specific to each school and to the user. To remove the saved default settings, click the **Reset Default** button.

Print Save Default	Reset Default Ema	ail Me	Status: Ready	G 🗟 🖓
	е			~
	Eiguro 21	Ponort Interface Sereen		

Figure 2.1 – Report Interface Screen

You can email the report to yourself with one click, with the **Email Me** button. This requires that Synergy SIS is configured to use the local email server. For instructions on how to configure email, see the *Synergy SIS – System Administrator Guide*.

When the **Print** button is clicked, the report is not actually sent to a printer. It is displayed on the screen as a PDF file. This PDF can then be sent to a printer or saved. When you click the **Print** button and Synergy SIS is creating the report, the **Job Status** screen opens.

Check Status Later Abort	Form Status: Ready
Job Status	
Job Detail	۵
Job ID Description STU401 Student List	
Status	٥
Waiting: This job is 2nd in the queue	
NOTE: This view will refresh regularly (until the job is complete) updating the status.	

Figure 2.2 – Job Status Screen

You can cancel the report by clicking the **Abort** button. Clicking the **Check Status Later** button closes the **Job Status** screen, but the report and its results can still be viewed from the **Job Queue Viewer** screen. When the report is finished, the **Job Status** screen closes and the report opens in a PDF viewer. For more information about the **Job Queue Viewer**, see Chapter Six.

SORT/OUTPUT OPTIONS

The options available on the **Sort/Output** tab of each report can change the order in which the data is sorted, and they can change the format of the printed report. Additional reports and mail merge documents may also be attached to the report to assist with mailings.

VReport Interface	
Name: Permanent Record Number: REC201 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Output 📀	Label Options
File Type Prompt for download Show Active/Inactive	Display "Confidential"
PDF Active Only	
Phone Number Options	
Mask Phone Numbers	
Mask unlisted phone numbers	
Student Mandatory Sort Properties:	
None	
Student	Add
X Line Sort By	Sort Order
Last Name (Student.LastName)	Ascending 🗸
Eirst Name (Student.FirstName)	Ascending 🔽
Middle Name (Student.MiddleName)	Ascending 🔽
Perm ID (Student.SisNumber)	Ascending 🔽
Additional Report to Run	
×	
Mail Merge Options	
Merge Document Merge Output Type Merge Language Proper	
× ×	×
The Merge Language Property is used to determine which version of the docum created. If there is no corresponding document for the given language (or this file	
Attach PDF To Students	
Attach To Student Document Category	

Figure 2.3 – Report Interface Screen, Sort/Output Tab

To customize the sort/output options:

- 1. The default file type for most reports is PDF, but reports can also be generated in the following formats by selecting them from the **File Type** list:
 - TIFF Image a graphics file
 - CSV a comma-separate values file
 - Excel a Microsoft Excel version 1997-2003 format file
 - HTML a web page in the standard Synergy SIS format
 - Rich Text a document file (basically Microsoft Word format)
 - Text File a plain text file with no formatting, in tab-delimited format
 - XML an extensible markup language file

2. If **Prompt For Download** is checked, a prompt appears when the report is generated to either save or open the report.



Figure 2.4 – Report Download Prompt

3. To display the word Confidential on the report, select where the Confidential label should appear on the report from the **Label Options** list. It can appear in the **Footer**, **Header**, or **Header & Footer**.

	Hope High School Student List	Year: 2009-2010 Report: STU401
Student Name Perm	D Grade Gender Birth Date	le Gender Birth Date
Printed by Admin User at 10/10/2009 9:	B AM Edupont School District CONFIDENTIAL	Page 1 of 31
	Figure 2.6 – Report Footer, Confidential Label	

- 4. If the report has been set up with a mandatory primary sort, this sort is displayed **Student Mandatory Sort Properties** box and cannot be changed.
- 5. The default sort order is shown in the middle of the screen. The properties, or fields, listed are different for each report. The report is sorted by the order in which the properties are listed. For example, the report below is sorted first by the students' last names, then by their first names.

Student					Add	
×	X Line Sort By Sort Order			r		
	1	Last Name (Student.LastName) 🛛 👻	Ascendi	ig 🔽		
	2	First Name (Student.FirstName)	Ascendi	ig 🔽		
	3	Middle Name (Student MiddleName)	Ascendi	ig 🔽		
	4	Perm ID (Student.SisNumber)	Ascendi	ig 🔽		



- 6. To change an existing property, select the new property from the list in the Sort By column. The list of properties available for sorting is different for each report. The direction of the sort may also be changed by selecting it from the list in the Sort Order column. Ascending sorts from smallest to largest value, or from A to Z. Descending sorts from largest to smallest, or from Z to A.
- 7. To add a new property to be used to sort, click the **Add** button. Select the property to use in the **Sort By** column, and select the direction of the sort in the **Sort Order** column.

8. For some reports, there is an option to select an Additional Report To Run. This report will run in conjunction with the primary report. The three additional reports available currently are STU424 – Student Oldest or Youngest, STU802 – Student Mailing Labels, and STU803 – Student Household Labels. The Student Oldest or Youngest report prints one mailing label per household with the information from either the oldest or youngest sibling. The Student Mailing Labels use the student's mailing address, and the Student Household Labels use the parent's mailing address. By running the labels in conjunction with the report, the labels are printed in exactly the same order as the report with exactly the same students. This makes it much easier to generate all the reports needed to complete a mailing.

Additional Report to Run	
STU802 - Student Mailing Labels	
Mail Merge Options	
Merge Document	Merge Output Type Merge Language Property
×	Home Language (Student.HomeLa 🗸
	used to determine which ∨ersion of the document (defined in Mail Merge setup) will be created. If there is no ven language (or this field is left blank) the default letter is used.
	Figure 2.8 – Additional Report To Run/Mail Merge Options

- A mail merge letter may also be generated in conjunction with the report. As with the labels, this makes a mailing much easier to coordinate. To create a mail merge letter to be used, please refer to the instructions on creating mail merge letters in the *Synergy SIS System Administrator Guide*. Once a letter has been created, select the letter from the Merge Document list.
- 10. Select the type of document to print from the **Merge Output Type** list. The merged document can be printed as either a **Word Doc** or **PDF**.
- 11. Select the language in which the document should be printed from the **Merge Language Property** list. The language currently defaults to the **Home Language** of the student (as entered into the Student screen). When the merge document is printed, it looks up the language of the student and then looks to see if there is a mail merge letter saved in that language. If a mail merge letter is not available in the student's language, the default language (generally English) is used.
- 12. To attach a PDF of the report to a student's record, check the Attach To Student box, select a Document Category, and enter a Document Comment if desired. After the report is run, you can find it on the Documents tab of Synergy SIS > Student > Student.

FILTERING A REPORT

Filtering a report limits the information included on the report to the records that match the filter, or condition. Most of the common criteria used to filter a report are listed on the **Options**. To filter a report separately from the options available on the **Options** tab:

1. Click the **Conditions** tab.

				~		
Name: Permanent Record Number: REC201 Page Orientation: Portrait						
Options Sort / Output Conditions S	election Advanced					
Student				Add 🔕		
X Line Condition	Not	Operator	Value			
	<u> </u>					



2. Click the Add button to add a filter, and a new line is added to create a new condition. A condition is like a mathematical formula. It looks at each record to be included in the report, and compares it to the condition. If it matches the condition, it is included in the report. A condition has three main parts: which property in the report to examine, the mathematical operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

Property = Value or Property ≠ Value



Figure 2.10 – Conditions Tab, Adding a Condition

 Select the property to be used for the filter from the Condition list. The list of properties available is different for each report. The properties are generally items from the primary table of the report. For example, a report about students lists student properties such as the student's language, birth date, and city. A report about sections lists section properties such as section ID, course title, and room number.

The name of the table from which the property is taken is listed in parenthesis after the name of the property. This is helpful when selecting properties that have the same name in more than one table. For example, Phone is used both in the physician records and student records.

Phone	(Physician.Phone)	
Phone	(Student.PrimaryPhone)	

Phone (StudentSchoolYear.DropOffRespPhone) Figure 2.11 – Property List

- 4. Set the operation by using the **Not** and **Operator** columns together. For example, if the **Operator** is **Equal To** and **Not** is selected, the operation is **Not Equal To**. The Operator can be set to one of the following:
 - Contains the property selected must contain the value entered. For example, if Email is selected as the property and the value entered is yahoo, the report lists all students with an email address that contains the letters *yahoo* (billy@yahoo.com, melissa@yahoo.com). If Not is added, the report lists all email address that do not contain *yahoo* (george@gmail.com, sandra@hotmail.com).
 - Equal To the property selected must be exactly the same as the value entered. For example, if Home Language is selected as the property and the value entered is English, the report lists all students whose home language is English. If Not is added, it lists all students whose home language is not English.
 - Ends With the property selected must end with the value entered. For example, if section IDs were created with the Course and Period option and 01 is entered as the value for the section ID property in a report, the report lists all sections for period 01.
 - **Greater or Equal** the property selected must be greater than or equal to the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2014 or later. If **Not** is added, the report lists only students with an expected graduation year of 2013 or earlier.
 - **Greater Than** the property selected must be greater than the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2015 or greater.
 - In List the property selected must include one of the values entered in the Value field. Enter values separated by commas. For example, if Grade is the property and the values entered are *1, 2, 3*, the report lists all students in grades 1, 2, or 3.
 - Less Than or Equal the property selected must be less than or equal to the value entered. For example, if Age is the property and the value is 15, the report lists students 15 and younger.
 - Less Than the property selected must be less than the value entered. For example, if Age is the property and the value is 15, the report lists students younger than 14 and younger.
 - **Starts With** the property selected must start with the value entered. For example, if **Enter Code** is the property and the value is R, the report lists students whose enter code starts with R (R1, R2, R3).
- 5. Enter the Value to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYY format. When using a value from a list, enter either the Code or its Description. For example, for Gender enter either M or Male. When entering a value for a property with a check box, use Y for checked or N for not checked.

6. Enter additional conditions if needed. For a record to be printed, it must match all of the conditions entered.

FILTERING BY STUDENT

If the report is a student-based report, you can select students to be included using the **Selection** tab. If the report is not a student-based report, this option is not available. To select which students should be included on the report:

1. Click the **Selection** tab.

Report Interface	«
Name: Permanent Record Number: REC201 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Object Type Select Clear	
X Line Condition	

Figure 2.12 – Selection Tab, Report Interface Screen

- 2. Select **Student** in the **Object Type** list.
- 3. Click the Select button. The Chooser screen opens.
- 4. In the Find Criteria section, enter information known about the students to be included, and click the Find button at the top of the screen. You can use any part of the last name, first name, middle name, and/or ID, such as the first letters of a name.

Find Select			
Chooser			
Find Criteria			0
Last Name First Name	Middle Name Perm	ID	
	Add Selected Row(s) >	Add All Row(s) >>	
Search Results			
Find Result		Selected Items	
Line Student Name		X Line Student Name	
Abbott, Billy C.			
2 Abernethy, Anne E.			

Figure 2.13 – Chooser Screen, Results

 In the list of students that appears in the Find Result grid, click one name or Ctrlclick multiple names, and click the Add Selected Row(s) button to add the student(s) to the Selected Items grid. Do multiple searches if required.

Find	Select				
Cho	ooser				
Find (Criteria				۵
Last N	lame	First Name	Middle Name	Perm ID)
Ab					
		Ć	Add Selected Row(5) >	Add All Row(s) >>
Sear	ch Results				
Find	Result		٨	S	elected Items 🔇
Line	Student Name			>	Line Student Name
1	Abernethy, Anne E			Г	Abbott, Billy C.

Figure 2.14 – Chooser Screen, Selected Items Section

6. Click the Select button at the top of the screen to add the students to the report.

✓Report Interface	«
Name: Student List Number: STU401 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Object Type	
Student 🗸 Select	
	٨
Line Student Name	
Abbott, Billy C.	

Figure 2.15 – Report Interface Screen, Selection Tab, Students Selected

SCHEDULING REPORTS

By default, when a report is printed, it runs once, and the options selected on all tabs are not saved. Reports can be created to run on a scheduled basis on the **Advanced** tab. When reports are scheduled, they run every time with the options selected on all tabs at the time the report was first run. They also run based on the year and school in focus at that point.

When a report is scheduled, a job is created in the Job Queue to run the report on the first scheduled time and date. When the report is run at the first scheduled time and date, it creates a new job to run at the next scheduled time and date, and so on. To stop a scheduled report, delete it from the Job Queue. For more information about working with the Job Queue, see to Chapter Six.

To schedule a report:

1. Select the options to be used in the report on the tabs of the **Report Interface**.

2. Click the Advanced tab.

Report Interface	«
ame: Permanent Record Number: REC201 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Schedule Job	
Schedule Task Drice	
Notification	٢
External Interface	٢

Figure 2.16 – Report Interface Screen, Advanced Tab

- Select the frequency with which the report should be run from the Schedule Task list. Reports can be set to run Once, Daily, Weekly or Monthly. Once is for printing the report immediately.
- 4. For **Daily**, **Weekly** or **Monthly**, enter the time the report should run in the **Start Time** field in HH:MM AM/PM format. Enter the date the report should start running in the **Start Date** field, and, if needed, enter the date the report should stop running in the **Stop Date** field (for example, the date of the end of the school year).

Schedule Job				
Schedule Task	Start Time	Start Date	Stop Date	
Daily 🔽	2:50 PM	10/10/2009		
			Figure 2.17 -	- Setting the Schedule

5. For **Daily** reports, enter the number of days between report runs. For example, to run a report every day, enter 1. Enter 7 to run the report once a week.

Schedule Task Daily		3
Ever <mark>y</mark> 7 Day(s)		
	Figure 2.18 – Scheduling a Daily Report	

6. For **Weekly** reports, enter the number of weeks between report runs. To run the report every week, enter 1. Also check the box for each day of the week on which the report should run. For example, a report could be scheduled run every week on Monday and Friday.

Schedule Task Weekly		۵	
Every4 Week(s) on:	🔽 Monday	F Saturday	
	🔽 Tuesday	🗖 Sunday	
	🔽 Wednesday	,	
	🔽 Thursday		
	🔽 Friday		
Figure 2.19 – Scheduling a Weekly Report			

7. For **Monthly** reports, choose whether to run the report based on the **Day of the Month** such as the 1st or the 20th, or to run it based on a weekday, such as the second Tuesday of the month. Also check the box for each month during which the report should run.

Schedule Task Monthly 🔷				
C Day of the month(s)	🔽 January	🔽 July		
	🔽 February	🔽 August		
	🔽 March	September		
	🔽 April	🔽 October		
	🔽 May	Vovember		
	🔽 June	Cecember		

Figure 2.20 – Scheduling a Monthly Report

- 8. If desired, complete other fields on the **Advanced** tab, unrelated to scheduling reports, as described on the next few pages.
- 9. Click the **Print** button at the top of the screen to save and schedule the report. The **Job Status** window opens. A scheduled job does not go to the top of the queue and print until the scheduled date and time

Check Status Later Abort		Form Status: Ready
Job Status		
Job Detail		0
Job ID Description		
STU401 Student List		
Status		٥
Waiting: This job is 2nd in the queue		
	* *	
NOTE: This view will refresh regularly (until the job is complete) updating the status.		
Figure 2.21 – Job Status Screen		

10. .Close the Job Status window.

Caution: When reports are scheduled, they run every time with the options selected on the tabs of the **Report Interface**, and for the year and school in focus at the time the report was first run. These values cannot be edited after the report is first run. Be sure to set up the report exactly as it should be run each time before you click the **Print** button. To change a scheduled report, you must delete it from the Job Queue and recreate it.

After the report is run at its scheduled time, the results of the report can be opened and printed from the **Job Queue**. To remind report users each time the report has been run, notifications can be sent via e-mail.



Reference – Before sending notifications by email, you must configure Synergy SIS to use the local email server. For instructions on how to configure email, see the *Synergy SIS* – *System Administrator Guide*.

To notify users via e-mail when a scheduled report is run:

1. On the **Advanced** tab, click the Maximize button to expand the **Notification** section.

✓Report Interface		(«
Name: Student List Number: STU401 Page Orientation: Portra	iit	
Options Sort / Output Conditions Selection Advan	nced	
Schedule Job		۵ ۵
	Date	
Monthly 🖌 2:50 PM 10/10/2009 🕎	P	
Schedule Task Monthly		Q
C Day of the month(s)	🔽 January	🔽 July
• The First • Monday • of the month(s)) 🔽 February	/ 🔽 August
	March	September
	🔽 April	Cotober
	🔽 May	✓ November
	🔽 June	C December
Notification		
External Interface		C

Figure 2.22 – Advanced Tab, Report Interface

2. Enter the email addresses of the users, separated by commas.

✓Report Interface	(«
Name: Student List Number: STU401 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Schedule Job	() ()
Schedule Task Start Time Start Date Stop Date	
Monthly 2:50 PM 10/10/2009	
Schedule Task Monthly	Q
C Day of the month(s)	ary 🔽 July
The First ✓ Monday ✓ of the month(s) ✓ Febru	uary 🔽 August
V Marci	n 🔽 September
🔽 April	Cotober
🔽 May	✓ November
🔽 June	🔽 December
Notification	Q
Email the following address(es) upon completion e.g. user@server.net, user2@server2.com	
e.g. doer@oerror.ner, doerz@oerrorz.toom	
J	
Include the result report as an attachment	

Figure 2.23 – Setting Up Notifications

3. To include the report in the e-mail so users don't have to go to the **Job Queue** for it, check the **Include the result report as an attachment** box.

Reports can also be saved as a file to a location on a server. This function can be used to export data from Synergy SIS that can then be imported or used in another program. To set the report to save to a file:

1. On the **Advanced** tab, click the Maximize button to expand the **External Interface** section.

Report Interface	«
ame: Permanent Record Number: REC201 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Schedule Job	٢
Schedule Task	
Once 🔽	
Notification	٢
External Interface	٢

Figure 2.24 – Report Interface Screen, Advanced Tab

2. In the box at the top of the section, enter the full UNC path and file name, such as \\SERVER\Folder\FileName.txt. To include the date and/or time in the file name to create a unique file name, include {Date}, {Time} or {DateTime} in the name of the file, such as File{Date}.txt to create file names like File20130703.txt.

	(4
Name: Student List Number: STU401 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Schedule Job	٢
Schedule Task	
Once 🖌	
Notification	٢
External Interface	٢
Fully qualified UNC destination output path for the report results. The output file name (if specified) can be static or include {Date}, {Time} or {DateTime} to create a unique output file name. e.g. WSERVER/FOLDER/FILE{DateTime}.txt	
NSERVERNAME\Folden\File(DateTime).txt	
Fully qualified UNC path to the external application to be launched upon successful completion. Use {File}, {Path}, and {PathFile} tags to optionally pass information about the output file to the application. e.g. WServer/Folder/AppToExecute.exe {File}	:0
NSERVERNAME\FoldenBatchFile.bat	

Figure 2.25 – Configuring the External Interface

3. If another program should be started each time the report is saved to this file, enter the full UNC path and file name of the program in the box at the bottom of the section, such as \\SERVER\Folder\BatchFile.bat. Information about the saved file can be passed to the program by using {File}, {Path} or {PathFile} after the name and location of the program, separated by a space or other commands, as \\SERVER\Folder\BatchFile.bat {Path}.

If the central printing option is configured for your district on the **Options** tab of **Synergy SIS > System > Setup > System Configuration**, you can send the report to a central printer.

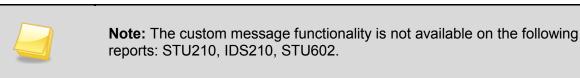
- 1. On the **Advanced** tab, click the Maximize button to expand the **Centralized Printing** section.
- 2. Check the Send to Central Printing box.
- 3. Make selections in the Job Description, Number of Copies, Job Type, and Paper Size lists.
- 4. Check the **Three Hole Punch** box if desired.
- 5. To include special instructions or another message, use the **Delivery Message** field.

For information about configuring Synergy SIS to use centralized printing, see the Synergy SIS – System Administrator Guide.

DISTRICT REPORT OPTIONS

At the bottom of each report, a footer shows who printed the report, and the date and time the report was printed. It also shows the name of the district and the page number. A custom message can also be added just above the standard footer.

This is a sample Footer Boiler Plate message.				
Printed by Admin User at 06/27/2011 12:02 PM	Edupoint School District	Page 1 of 1		
Figure 2.	.26 – Sample Report Footer Message			



You can also choose to mask unlisted phone numbers on reports that would otherwise show the numbers.

To configure footer settings across the district:

1. Go to Synergy SIS > System > Setup > District Setup, and click the Reports tab.

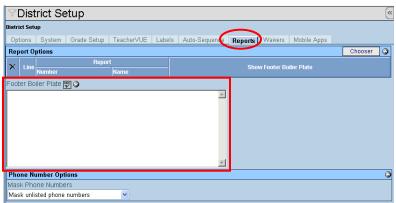


Figure 2.27 – District Setup Screen, Reports Tab

2. Enter the custom message in the **Footer Boiler Plate** box.

3. Click the **Chooser** button, and find and select the reports that will display the custom footer.

♥District Setu	IP	(<
District Setup	·	
Options System Gr	ade Setup TeacherVUE Labels Auto-Sequence	Reports Waivers Mobile Apps
Report Options		Chooser D
× Line	Report	Show Footer Boiler Plate
Number	Name	
ATD201	Daily Attendance Profile	
2 GRP201	Student Group Profile	
🔲 3 IDS201	Student Discipline Profile	
Footer Boiler Plate 🕎 🕻)	
This is a sample Footer E	loiler Plate message. 🗾	
Phone Number Options	3	Q
Mask Phone Numbers	nbers 🗸	
Mask unlisted phone nun	nbers 📉	

Figure 2.28 – Showing Footer Boiler Plate Message

- 4. Check the Show Footer Boiler Plate box for each report to display the message.
- 5. For reports that include list student, parent, or staff phone numbers, use the **Mask Phone Number** list to select whether to print unlisted numbers. **Mask unlisted phone numbers** shows unlisted numbers as follows:

	Phone	
	###- ### -####	
Fi	gure 2.29 – Masked Phone Numbe	r

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

CAUTION		: Users may override this setting for their printed reports on the Preferences tab of the User Password and Preferences
Č.	corooni	Vilser Password and Preferences
		User Name: User, Admin
		Password Preferences Report Preferences
		Student Profile
		Student Schedule
		Discipline Profile
		Student Attendance Profile
		Reporting Preferences
		Phone Number Options G
		Mask Phone Numbers
		Mask unlisted phone numbers
		Show unlisted phone numbers
		Figure 2.30 – Report Preferences Tab, User Password and Preferences Screen

REPORT GROUPS

Occasionally, there may be a need to print several reports for a student or group of students. For example, there may be several reports that the district would like to print each time a student withdraws. Rather than printing each report individually, you can create a report group to streamline this process. To create a report group:

1. Go to **Synergy SIS > System > Setup > Report Group**.

✓Report Group			(
Name: Number: Deploy Version:			
Definition			
Name Number			
Options			6
Select the primary report assoicated with this report group	Output Type	Location of the report group in the I	PAD tree
	~	×	
Additional Reports			Chooser 🔇
X Line Order	😝 Report Name		

Figure 2.31 – Report Group Screen

2. Click the Add button, and a new Report Group window opens.

	Save Close		
	Report Group		(«
	Definition		
	Name Number		
ļ			
	Options		Q
	Select the primary report assoicated with this report group	Output Type Location of the	ne report group in the PAD tree
		× ·	
	Additional Reports		Chooser
	X Line Order 🗧	Report Name	

Figure 2.32 – Adding a Report Group

- Enter the Name of the report group, and a Number. The number will be prefaced by UD- automatically when saved, as the report group is saved with the other userdefined reports in the PAD tree.
- 4. Click the **Chooser** button to select the reports to be included in the group. The **Chooser** window opens.
- 5. Enter all or part of the **Name**, **Number**, or both, for reports to be included in the group, and click the **Find** button.

\frown			
Find Select			
Chooser			
Find Criteria			(3
Name	Number		
	Add Selected Row(s) >	Add All Row(s) >>	
Search Results			
Find Result	(Selected Items	۵
Line Name Number		X Line Name	Number
	Figure 2.33 – Ch	ooser Screen	

6. In the **Find Result** grid, click a report or Ctrl-click multiple reports to add, and click the **Add Selected Row(s)** button. Do multiple searches as needed until all reports have been found and added to the **Selected Items** section.

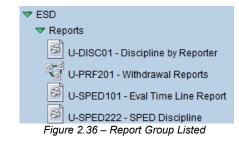
Find	d Select					
Ch	ooser					
Find	Criteria					٩
Name	9	Numb	er			
		Add Selected Row	(s) >	Add All Row(s) >>		
Sea	rch Results					
Find	Result	٨	S	elected Items		٨
Line	Name	Number	>	Line Name	Number	
1	Daily Attendance Minutes Profile	ATD202				
	Daily Attendance Profile	ATD201				
3	Period Student Attendance Profile	ATP201				
4	Student Career Plan Profile	CPL201				
5	Student Discipline Profile	IDS201				
6	Student Discipline Profile	ADS201				
7	Student Fee Profile	FEE201				
8	Health Screening Profile	HLT211				
9	Student Health Profile	HLT201				
10	Student Immunization Profile	HLT202				
	F	igure 2.34 –	- Findi	ng a Report		

7. Click the **Select** button. The selected reports are added to the **Additional Reports** grid.

Save Close							
Report Group							
Definition							
Name Number							
Student Profile Complete U-PRF201							
Options G							
Select the primary report assoicated with this report group Output Type Location of the report group in the PAD tree							
STU201 - Student Profile - (K12.Reports)							
Additional Reports Chooser							
X Line Order \ominus Report Name							
5 STU204 - Student Transcript							
2 1 IDS201 - Student Discipline Profile							
3 2 HLT201 - Student Health Profile							
4 3 HLT202 - Student Immunization Profile							
5 4 CNF201 - Student Conference Profile							

Figure 2.35 – Completing a Report Group

- 8. Choose the report to be used for the report interface for the group from the **Select the primary report associated with this report group** list.
- 9. Select the **Output Type**. A **Combined** group prints one PDF with all of the reports. A **Separate Files** group generates one PDF for each report in the group.
- 10. Enter the folder in the district PAD tree where the report group should be saved in the **Location of the Report Group in the PAD Tree** box.
- 11. Click the **Save** button at the top of the screen. Saved groups appear in the district PAD Tree as shown below.



When printing the report group, the group will use the **Report Interface** of the selected primary report. Be sure this report has the options needed for all other reports in the group.

✓Report Interface	(
Name: Student Profile Complete Number: U-PRF201 Page Orientation: Portrait	
Options Sort / Output Conditions Selection Advanced	
Student Info	0
Perm ID	
Last Name First Name	
Grade	
× - ×	
Report Options	(
Suppress Photo	
Print Blank Report	
T Hide Parent Info	
Hide Emergency Info	
T Hide Health Info	
T Hide Physician Info	
Hide Bus Route Info	
Include Health Condition History	
Show Homeroom Teacher	
Show Reason For Attendance	
Enable Double Sided Printing	
T Hide Signature	
Show School Of Attendance	

Figure 2.37 – Report Group, Report Interface

To edit or delete a report group:

1. Go to Synergy SIS > System > Setup > Report Group.

Menu V 🔇 🛞 😹 Find Undo Add Delete	Status: Find 没 🖓 🤯
	(«
Name: Deploy Version:	
Definition	
Name Number	
Options	۵
Select the primary report assoicated with this report group Output Type Location	of the report group in the PAD tree
Additional Reports	Chooser 📀
X Line Order ⇔Report Name	

Figure 2.38 – Report Group Screen

2. Use Find mode or the Scroll buttons to find the group.

Menu 🗸 🛞 🛞 🥘 🍒	ave Undo Add Delete	Status: R	eady 🔗 🖓 🥳 🥝					
✓Report Group								
Name: Student Profile Complete	Vame: Student Profile Complete Number: U-PRF201 Deploy Version: 2							
Definition								
Name Number								
Student Profile Complete U-PRF201								
Options			۵					
Select the primary report assoicate	d with this report group Output	Type Location of the report group in th	e PAD tree					
STU201 - Student Profile - (K12.Repo	rts) 🔽 Combin	ed 🖌 Reports						
Additional Reports			Chooser 🔇					
🗙 Line Order 🔶	Report Name							
1 1	ADS201 - Student Discipline Profile							
2 2	HLT201 - Student Health Profile							
33	HLT202 - Student Immunization Profile							
4 4	CNF201 - Student Conference Profile							
5 5	STU204 - Student Transcript							

Figure 2.39 – Completed Report Group

- 3. To change the **Options**, click in any of the boxes and make a new selection.
- 4. To **remove a report** from the group, click in the box in the **X** column.

- 5. Click the **Save** button at the top of the screen to save the changes.
- 6. To delete the entire group, remove all reports in the group first. Then click the **Delete** button at the top of the screen.
- 7. To change the name and/or number of the group, click the **Menu** button and select the **Edit ReportDef Data** option.



8. The **Name** and **Number** boxes turn white and the text can be edited. Make the changes, and then click the **Save** button at the top of the screen.

Report Group
Name: Student Profile Complete Number: U-PRF201 Deploy Version: 2
Definition
Name Number
Student Profile Complete U-PRF201

Figure 2.41 – Changing the Name or Number of a Report Group

Chapter Three: QUERY USING FIND

In this chapter, the following topics are covered:

- ► How to create a report using Find Mode
- ► How to create charts using Find Mode
- ► How to print the Find results as a report
- ► How to create a query from the Find results
- ► How to create and manage Filters

QUERY USING FIND

In addition to locating the exact record to view on screen, Find mode can act as a quick report writer. Find mode works in any screen in Synergy SIS. To use Find mode to produce a quick report:

1. Adjust the focus to select the school and year to be included on the report. Also select whether to include active or inactive students. The focus is indicated in the top right corner of the screen.

		Hope High School Year.2011-2012 User.Admin User Show active and inactive
🕂 🚺 🖪 🧖 🏠 Quick Launch	R.	Lock Sign Out Support Help
	Figure 3.1 – Checking Current Focus	

- 2. Go to the screen with the information for the report.
- 3. If the screen is not in Find Mode already, click the Find mode button. When a screen is in Find Mode, all fields are yellow.

Menu 🔻 🔍 🔇	🔊 🥰 Find Undo Add Delete Status: Find 🖓 🦓
∀Student	t
Student Name:	School: Homeroom: Teacher:
Demographics	Parent/Guardian Other Info Emergency Enrollment Enrollment History Classes Documents Student Contact Log
Last Name	First Name Middle Name Suffix Perm ID Grade Gender
<u> </u>	
Student Informa	ation
No Photo	Home Language Spoken to Student at Home Nick Name Last Name Goes By
Edupoint	SAIS ID Birth Date Birth Place Birth Verification Birth Certificate Num
On file	Birth State Birth Country Email
Race and Ethnic	city
Hispanic/Latino	Resolved Race/Ethnicity
Race⊇⇔⊉	
Vvhite 🗖 Blac	
L Asian L Pac	cific Islander/Hawaiian 🗖 Declined to State

Figure 3.2 – Student Screen

4. To include a field in the report, enter an asterisk * in the field. (First, Middle and Last Names and Perm ID are included in all queries by default when launched in this manner, and do not require an asterisk.)

In addition to selecting fields on just one tab, fields can also be selected on multiple tabs before clicking the Find button to create more complex reports.

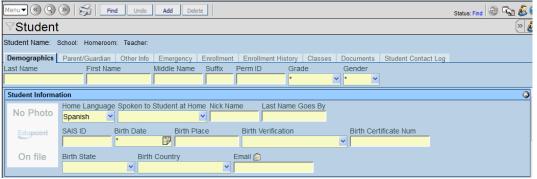


Figure 3.3 – Selecting the Fields



Note – Fields in grids such as the **Phone** grid on the **Student** screen or the **Students** grid on the **Class Grades** screen cannot be included in the Find Mode results.

- 5. To filter the report, enter the criteria by which to filter in the appropriate field. For example, to show only students with a home language of Spanish, select **Spanish** fin the **Home Language** list.
- To match by the starting portion of the field, enter the first part of the text to match, followed by the asterisk. For example, entering D* in the Counselor field lists all students who have a counselor whose last name starts with D.

Counselor Name 🔶 I	ELL Code	ELL Date	Country Of Citizenship	Non Citizen Type	
d*	~			✓	~
		Figure 3.4 – Filt	ering By Text		

- 7. To match the last part of the field, enter the asterisk followed by the text.
- 8. To find the text in any part of the field, enter an asterisk, followed by the text, followed by another asterisk.
- 9. If appropriate, use operators to filter the information included in the results. Operators include =, <, >, and <> (for not equal). This is particularly useful for date fields. For example, entering >=9/1/12 in the Enter Date field would return all students whose enter date is greater than or equal to 9/1/2012. Operators can be used with numbers, dates, and text.
- 10. Click the **Find** button to see the results. The results appear in a new window. The results can then be printed as a report, saved as a filter, or opened in a query as explained later in this chapter.

Quer	Ŋ			Filter				() ()
Open In Query Print Output Type PDF 💌		Save As	Filter Filter	Name		Make Active		
Stud	lents							٥
Line	Last Name	First Name	Middle Name	Perm ID	Grade	Gender	Home Language	Birth Date
1	Abbott	Billy	С	905483	12	Male	Spanish	05/13/1992
2	Acevedo	Andrew		886630	12	Male	Spanish	03/04/1989
3	Sparks	Edith		997013	10	Female	Spanish	04/16/1998
4	Vista	Leonardo	G	997010	11	Male	Spanish	11/19/1992

Figure 3.5 – Find Results Screen

Note – Some fields are mandatory for the Find results, regardless of where the asterisks are placed. For example, the **Student** screen always includes the student's Last Name, First Name, Middle Name, and Perm ID. The **District Course** screen always includes the Course ID and Course Title.

CHARTING

Find mode can also produce basic charts based on the fields on the screen. Four types of charts are available – pie chart, bar chart, wave chart, and circle chart.

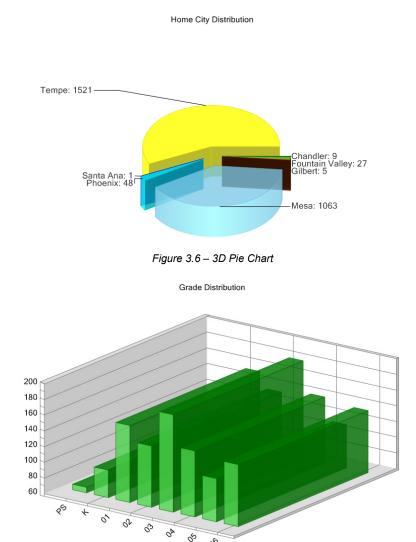
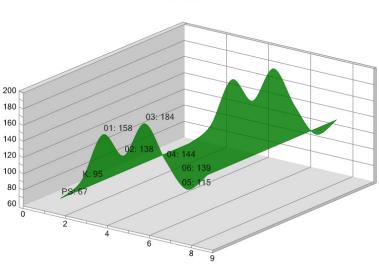


Figure 3.7 – Bar Chart



Grade Distribution

Figure 3.8 – Wave Chart

Grade Distribution

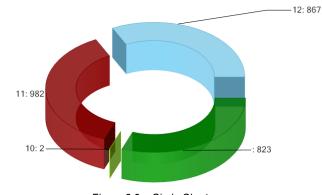


Figure 3.9 – Circle Chart

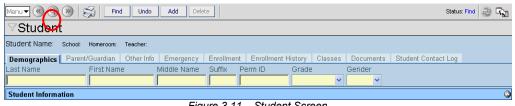
To print a chart:

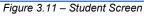
1. Adjust the focus to select the school and year to be included in the report. Also select whether to include active or inactive students. The focus is indicated in the top right corner of the screen.

	Ecupoint	Hope High School Year 2014-2012 User Admin User Show active and ingrate
🕂 🕂 🗐 🖉 🏠 Quick Launch	R N	Lock Sign Out Support Help
	Eiguro 2.10 Chooking Current	Foous



2. Go to the screen with the information for the report.





- 3. If the screen is not in Find mode already, click the Find mode button. When a screen is in Find mode, all fields are yellow.
- 4. Enter one of the following characters in the field to chart.
 - ^ (caret) for a pie chart
 - | (bar) for a bar chart
 - ~ (tilde) for a wave chart
 - \$ (dollar sign) for a circle chart
- 5. Click the **Find** button, and the chart opens in a new window.

PRINTING AS A REPORT

You can print the results of a Find by selecting an **Output Type** and clicking the **Print** button.

Query	1	S Filter	(
Open In Query Prin	t Output Type PDF 🗸 🗸	Save As Filter Filter Name	Make Active
Students			(
Line Last Name	First Name	Middle Name	Perm ID
1 Abbott	Billy	С	905483
2 Abernethy	Anne	Elizabeth	902870
3 Acevedo	Andrew		886630
4 Acevedo	Ashley		901830
5 Ackley	Brian	R	913948
6 Acosta	Eugene	A	873921
7 Acosta	John	Alvarez	150265
8 Acunia	Kenneth	Ovante	110412
9 Adair	Alan	William	871626
10 Adair	Diane	N	903912
11 Adair	Timothy	S	888621
12 Adams	Albert	Lee	889844
13 Adams	Howard	Todd	873985
14 Adams	Larry	A	889314
15 Adams	Martin	C	887623
16 Adams	Scott	M	939208
17 Adams	Sean	В	877340
18 Adams	Stephen	J	901622
19 Adamski	Alan	M	872035
20 Addington	Paula	M	871686
1 <u>2 3 4 5 6 7</u>	8 9 10 11 12 13 14 15 (>)		
	Eiguro	3 12 - Find Results	

Figure 3.12 – Find Results

By default, the results print as PDF file to the screen. The resulting file can then be sent to the printer or saved. To change the results to a different format, select the type of file from the **Output Type** list. The possible file types are:

- TIFF Image a graphics file
- CSV a comma-separate values file
- Excel a Microsoft Excel version 1997-2003 format file
- HTML a web page in the standard Synergy SIS format
- **PDF** a Portable Document Format for Adobe Reader
- Rich Text a document file (basically Microsoft Word format)
- Text File a plain text file with no formatting, in tab-delimited format
- XML an extensible markup language file

CREATING A QUERY

To further refine the results of the Find, the results can be opened in the **Query** screens. Click the **Open in Query** button at the top of the Find results.

Open In Query Print	Output Type PDF 🗸 🗸	Save As Filter Filter Name	Make Active
uuems			
ne Last Name	First Name	Middle Name	Perm ID
1 Abbott	Billy	С	905483
2 Abernethy	Anne	Elizabeth	902870
3 Acevedo	Andrew		886630
4 Acevedo	Ashley		901830
5 Ackley	Brian	R	913948
6 Acosta	Eugene	A	873921
7 Acosta	John	Alvarez	150265
8 Acunia	Kenneth	Ovante	110412
9 Adair	Alan	William	871626
10 Adair	Diane	N	903912
11 Adair	Timothy	S	888621
12 Adams	Albert	Lee	889844
13 Adams	Howard	Todd	873985
14 Adams	Larry	A	889314
15 Adams	Martin	C	887623
16 Adams	Scott	M	939208
17 Adams	Sean	В	877340
18 Adams	Stephen	J	901622
19 Adamski	Alan	M	872035
20 Addington	Paula	M	871686
4 0 0 4 5 0 7 0 0	<u>10 11 12 13 14 15 (>)</u>		

Figure 3.13 – Find Results

For information about how the query can be customized, see Chapter Four.

CREATING A FILTER

Find mode can also be used to create a filter to be applied to a screen. When a filter is applied to a screen, only the records that match the filter are see. This can make scrolling through records much easier. To save the Find results as a filter:

1. Enter a name for the filter in the **Filter Name** box.

Query	Silter		<u></u>
Open In Query Print Output T	ype PDF V Save	As Filter Name	Make Active
Students			Q
Line Last Name	First Name	Middle Name	Perm ID
1 Abbott	Billy	С	905483
2 Abernethy	Anne	Elizabeth	902870
3 Acevedo	Andrew		886630
4 Acevedo	Ashley		901830

Figure 3.14 – Find Results

- 2. To turn the filter on immediately, check the Make Active box.
- 3. Click the Save As Filter button.

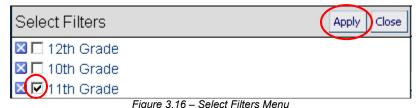
Once a filter has been created, it can be turned on and off by clicking the Filter icon in front of the name of the screen. The Filter icon looks like a funnel. To turn a Filter on and off:

1. Click the **Filter** icon.

Menu 🕶 🔇 🍳	enu 🔍 🛞 🛞 💭 Find Undo Add Delete Status: Find 🖓 🦓											
Student	t											
Student Name:	School:	Homeroom:	Teacher:									
Demographics	Parent	t/Guardian	Other Info	Emergency	Enrollmer	nt Enrollmen	t History	Classes	Documents	Student Contact Log		
Last Name		First Nam	е	Middle Name	Suffix	Perm ID	Grade		Gender			
								~	~			
Student Informa	ation										0	

Figure 3.15 – The Filter Icon

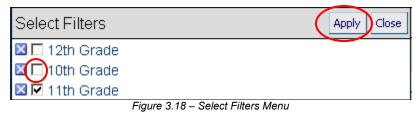
2. The **Select Filters** menu opens. Check the filter or filters to turn on, and click the **Apply** button. To close the **Select Filters** menu without making any changes, click the **Close** button.



When a filter is applied, the **Filter icon** changes to indicate a filter is active.

Menu V 🔇 🍳	Manuer (C)												
[™] Studen	[™] Student												
Student Name: School: Homeroom: Teacher:													
Demographics	Parent/Guardian	Other Info	Emergency	Enrollment	Enrollment H	History	Classes	Documents	Student Contact Log				
Last Name	First Nam	ie	Middle Name	Suffix P	erm ID	Grade		Gender					
							~	~					
			Fiaure (3.17 – Ac	tive Filter I	lcon							

3. To turn a filter off, click the Filter icon, uncheck the box next to the filter, and click the **Apply** button.



4. To delete a filter, click the Filter icon and click the X button next to the filter.

Select Filters			Apply Close
🛛 🗖 12th Grade			
🛛 🗖 10th Grade			
🛛 🗹 11th Grade			
	Figure 240	Salaat Filtara Manu	

Chapter Four: QUERY

In this chapter, the following topics are covered:

- ► How to access the Query screen
- ► The parts of the Query Screen
- ► How to create a basic query
- ► How to save a query
- ► How to save a query as a report or as a public query

A query is a way to define a custom report in Synergy SIS. A query can pull together any information in Synergy SIS, and queries can be saved so that they can be run repeatedly. They can also be saved as reports so they can be scheduled.

The Query screen is Synergy SIS > Query> Query.

PARTS OF A QUERY

There are three main parts to a query, represented by three tabs on the **Query** screen: **Columns**, **Conditions**, and **Sort**. The fourth tab, **Type in Query**, is where a query can be entered by typing instead of using the first three tabs to guide the query construction. Typing a query is for advanced users who are familiar with the conventions of the query language in Synergy SIS.

Save Open Execute Delete	Clear All	Save as Re	eport					Status: Ready	· 🕞 💐 🖉
√Query									~
Start Here! Enter the details about	t your query:								
Name	Group		Туре		Out	out Type	Orientation	Туре	
		•	 Select 	*	HTN	IL 👻	Portrait	✓ New	
Description 🕎 📀				\$		Allow Result	ts To Be Edit	ed	
Columns Conditions Sort Ty	vpe in Query								
Step 1. Select the Business Object	ts 🔇 (Objects	Action	- 🔇	Ste	p 2. Select	the Propertie	es	٥
Line Name		Course			Lir	ie Name			Туре
1 Course (K12.CourseInfo)						1 Academic	Туре		Drop Down
2 CourseAltCode (K12.Course	elnfo)					2 Add Cour	se Cat Code		Text
3 CourseAltFunding (K12.Cou	· · ·					_	Time Stamp		DATETIME
4 CourseCoReq (K12.Coursel	· · · · · · · · · · · · · · · · · · ·					4 Add ID St			Link Field
5 CourseKS (K12.CourseInfo.I	KS)					5 AICE India			Drop Down
6 CourseLevelList (K12.Cours							ool Course T	Fitle	Drop Down
7 CourseLevelMN (K12.Course	elnfo.MN)					Override 7 Alt ID 1			Text
8 CourseLinkedCourses (K12.CourseInfo)						8 Alt ID 2			Text
9 CourseMI (K12.CourseInfo.M	11)					9 Alt ID 3			Text
10 CourseMN (K12.CourseInfo.					1	0 Alt ID 4			Text
1 <u>2</u> <u>3</u> »							4567	<u>8 9 10</u>	0
Show All Business Objects						Show All Pro	perties		
Add Literal									
Step 3. Provide any desired prop	erty overrides	5							٥
X Line Name Label Override	. (Order	Width	Hide	Group	Break	Display	Aggre	gate
		Eigur	e 4 1 _ Or	ioni So			, , , , , , , , , , , , , , , , , , , ,	,	

Figure 4.1 – Query Screen

• The **Columns** tab is where the information that will be included in the query are selected. It can also customize how the information is displayed. It is called **Columns** because the information selected will appear in the output report in columnar format.

♥Query Results	∀Query Results												
Query Results													
Line Last Name	First Name	Gender	Perm ID	Phone									
1 Abbott	Billy	Male	905483	480-555-1214									
2 Abernethy	Anne	Female	902870	480-555-5844									
3 Acevedo	Andrew	Male	886630	480-555-2807									
4 Acevedo	Ashley	Female	901830	480-555-2807									
5 Ackley	Brian	Male	913948	480-555-6641									
6 Acosta	Eugene	Male	873921	480-555-6396									
7 Acosta	John	Male	150265	480-555-2545									
8 Acunia	Kenneth	Male	110412	480-555-1962									

Figure 4.2 – Query Results Screen

- The **Conditions** tab filters the information to be included in a query. If, for example, student information is selected on the **Columns** tab, the **Conditions** tab can define which students' information is included.
- The Sort tab defines the order in which the information is presented.

COLUMNS

The first part of creating a query is to choose the information to appear in the final report. Any information contained in Synergy SIS can be included in a query.

1. On the Columns tab, in the **Step 1. Select the Business Objects** grid, select business object to be used in the query from the list of the most commonly used business objects.

The selected object appears in the **Objects** list, and the properties associated with the selected business object appear in the **Step 2. Select the Properties** grid.

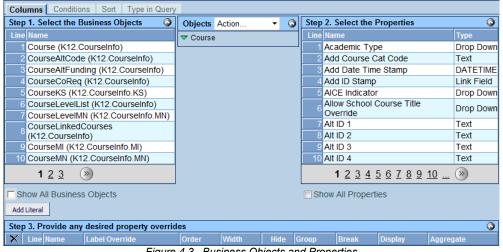
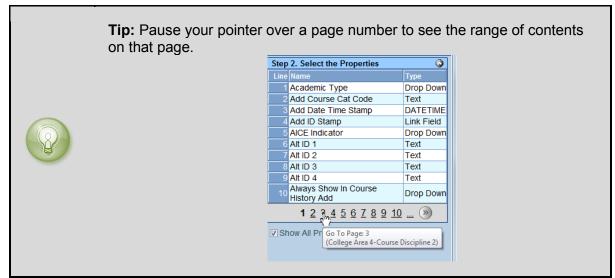


Figure 4.3 – Business Objects and Properties



2. Click a property to be included in the query. It appears in the **Step 3. Provide any desired property overrides** grid.

Step 1. Select the Business Objects	Objects /	Action	•		Step	2. Sele	ct the P	roperties			
Line Name	✓ Student				· · · ·	Name				Туре	
AZHealthImmunizationOther	· otadom				181	Street	GU			Link Fie	eld
(K12.HealthInfo.Repor)					182	Studer	it GU			Link Fie	eld
2 CALPADSStateStudentInformationODS					183	Studer	it Name	(LN, FN MI	SUFFIX)	Text	
(K12.CA.CALPADS)								(FN, MN, LN	· · · ·	Text	
3 CALPADSStudentEnrollmentODS (K12.CA.CALPADS)								(LN, FN MI		Text	
CALPADSStudentInfoODS					186	Suffix				Text	
4 (K12.CA.CALPADS)					187	Teen F	Parent			Drop D	own
5 ChildProgParticipation (K12.ProgramInfo)					188	Transo	ript Corr	ment		Memo	
6 EarlyChildhood (K12.IL)					189	Туре				Drop D	own
7 EarlyChildhoodOutcomes (K12.IL)					190	UC/CS	U Requi	rements Me	t	Drop D	own
8 EarlyOn (K12.ProgramInfo.MI)						11	12 13	14 15 16	17 18	10 20	
earlyOnPartCAssessment				l	0	11	12 10	14 10 10	<u> </u>	13 <u>20</u>	0
(K12.ProgramInfo.MI)					Sh	ow All F	Propertie	s			
10 ELL (K12.Programinfo)											
1 <u>2 3 4 5 6 7 8 9 10</u> >>>											
Show All Business Objects											
· · ·											
Add Literal											
Step 3. Provide any desired property overrides											0
X Line Name Labe	el Override	Order	Width	Hide	Group		Break	Display	ļ	lggregate	
1 Student.Student Name (LN, FN MI S		1				~			~		

Figure 4.4 – Provide Any Desired Property Overrides

3. Click another property for the object to add it to the query, and continue adding properties until all needed information is shown in the **Step 3. Provide any desired property overrides** grid.

Step	Step 3. Provide any desired property overrides											
×	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate		
	1	Student.Student Name (LN, FN MI S					*	~	~	~		
	2	Student.Gender					~	~	~	~		
	3	Student.Birth Place					~	~	~	~		

Figure 4.5 – Completed Basic Query

4. To see what the query will look like, click the **Execute** button at the top of the screen. The query opens in the format selected (the default is HTML). If the information is correct, the query can be saved or further customizations can be made.

Que	y Results		0
Line	Student Name	Gender	Birth Place
1	Abbott, Billy C.	Male	Mesa
2	Abel Jones Holbrook, Albert Joseph R.	Male	Mesa, Az
3	Acosta, Eugene A.	Male	Las Vegas
4	Acunia, Kenneth O.	Male	Phoenix Arizona
5	Adair, Alan W.	Male	Phoenix Az

Figure 4.6 – Query Results

Adjust the query as described below and click **Execute** as many times as needed to test. To clear the query and start over, click the **Clear All** button at the top of the screen.

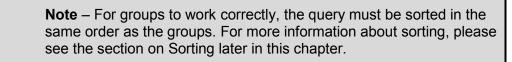


Reference – For instructions on how to use the **Show All Business Objects** and **Show All Properties** check boxes, and the **Add Literal** button, see Chapter Five. Some simple customizations can be made to the display of the query in the **Step 3**. **Provide any desired property overrides** grid.

Ste	Step 3. Provide any desired property overrides												
X	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate			
		Student.Student Name (LN, FN MI S					*	~	~	~			
	2	Student.Gender					*	~	~	~			
	📕 3 Student.Birth Place												
	Figure 4.7 – Completed Basic Query												

- 1. To delete a property from the report, check the box in the **X** column next to the property. The property is instantly removed from the list.
- 2. To change the heading of the column in the report, enter the new heading in the **Label Override** column. The default heading is the name of the property, such as Perm ID or Gender.
- 3. To change the order of the columns, enter sequence numbers in the **Order** column. If properties have the same number, order will default to alphabetical by Name.
- 4. To change the width of each column, enter the new width in inches in the **Width** column.
- 5. To hide a property so that it used in the query calculation but it is not displayed on the report, check the **Hide** box. This is generally used for more complicated queries as outlined in Chapter Five. However, it can also be used so that a property can be used for sorting or filtering but does not appear on the report.
- 6. Each property listed can be used to group the records with same value in the property. To group on a property, select the Group number from the **Group** list. Group 1 is the first property to group, Group 2 is the second, and so on. When a property is grouped, it is removed from the columns and placed at the top of each page on which the records of the group is listed.

Male					
	Last Name	First Name	Perm ID	Phone	Birth Country
	Abbott	Billy	905483	480-555-1214	United States of America



7. If grouping the records, a break should also be inserted into the report to allow the group information to display. While the group information does appear at the top of the page, it will be rare that the groups split exactly at the end of the page. Without the break, the records would still be grouped, but the group would not appear on the report. The **Break** can be by **Group** or by **Page**.

8. The **Group** break inserts information about the group and repeats the header information, but does not start a new page at the start of each group.

Australia, Commonwealth of				
Last Name	First Name	Gender	Perm ID	Phone
Laurence	Jonathan	Male	167792	480-555-9641
Belgium, Kingdom of				
Last Name	First Name	Gender	Perm ID	Phone
Renard	Amanda <i>Figure 4.9 – Group</i>	Female Break	950761	480-555-5668

The Page break starts a new page at the start of each new group in addition to repeating the group and header information.

Edupoine School District		e High Sc y Result Po	Year: 2009-2010 Report: QRY801	
Birth Country				
Birth Country Australia, Commonwealth of				
	First Name	Gender	Perm ID	Phone

10. For properties that are lists, the property has a Code and a Description. For example, the code for gender is M but the description is Male. In the query, select from the **Display** list to display the **Code**, the **Description**, or **Both**. Selecting the **Default** option lets Synergy SIS select the best fit for the property. Usually the default is the description, but in cases where the description is very long the code is usually used (such as with Enter Codes). When **Both** is selected, the Code is displayed first and then the Description, separated by a hyphen.

Last Name	First Name	Gender	Perm ID	Phone
Ahlstrom	Linda	F - Female	120451	480-555-0641
Waters	Victor	M - Male	153227	480-555-0325
Louden	Karen	F - Female	901958	480-555-2962
	Figure 4	11 – Display Both Option	1	

- 11. To perform a function on the aggregate of records returned by the query, select the function in the **Aggregate** column.
 - None is equivalent to a blank value and performs no function.
 - **Count** shows the total number of records found in a query. For example, this query has no **Aggregate** set and returns student names and Perm IDs:

St	Step 3. Provide any desired property overrides								۵	
×	Li	ne Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate
Γ	1	1 Student.Perm ID		2			*	~	~	~
Γ	1	2 Student.Student Name (LN, FN MI S		1			*	*	~	~

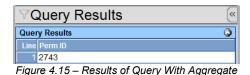
Figure 4.12 –	Query Without Aggregate
---------------	-------------------------

[™] Query Results					
Quer	Query Results				
Line	Student Name	Perm ID			
1	Abbott, Billy C.	905483			
2	Abernethy, Anne E.	902870			
3	Acevedo, Andrew	886630			
4	Acevedo, Ashley	901830			
5	Ackley, Brian R.	913948			

Figure 4.13 – Results of Query Without Aggregate

Step 3. Provide any desired property overrides											
×	Line	Name	Label Override	Order	Width	Hide	Group	Break	Display	Aggregate	
	1	Student.Perm ID		2			~	~	~	Count	~
	2	Student.Student Name (LN, FN MI	S	1			~	*	*		~

This query, with Aggregate set to Count for Perm ID, returns the count of Perm



- Average shows the mean value for a numeric field.
- Max shows the maximum value found for a numeric field.
- Min shows the minimum value found for a numeric field.
- **Sum** shows the total of values found for a numeric field.

CONDITIONS

Setting conditions for a query limits the information included on the query to the records that match the condition or conditions. To select conditions for the query:

1. Click the **Conditions** tab.

√Query						~			
Start Here! Enter the detail	s about your query:					6			
Name	Group	Type Select	Output Type	Orientation Label	Type Mew				
Description 🕎 📀									
Columns Conditions S	Columns Conditions Sort Type in Query Label Dimensions								
4. Condition Groups					Action	•			
	Figure 4.16 – Query Screen, Conditions Tab								

2. Click the Action list and select Add Condition.

Columns Conditions Sort Type in Query	
4. Condition Groups	Action 💌 🕥
	Action
	Add Condition
Figure 117 Adding a Condition	

- Figure 4.17 Adding a Condition
- 3. The **Add Condition** screen opens. A condition is like a mathematical formula. It looks at each record to be included in the query, and compares it to the condition. If it matches the condition, it is included in the query. A condition has three main parts: which property in the query to examine, the operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

Save	Close							
Add C	ondition			(«				
Condition	Definition							
Object	Property Not	Operator Type	Value					
Student	👻 HomeLangua (👻	👻 Starts With 💌 Value	🖌 Spanish					
Optional N	Optional New Condition Group							
New Group	? Condition Group Type							
	¥							

Figure 4.18 – Add Condition Screen

- 4. Select the **Object** that has the property to be used, and then select the **Property**. The objects available are those that you added to the query. However, any properties of the object can be used for the condition, not just the properties that have already been added to the query.
- Set the operation by using the Not and Operator lists together. Selecting NOT from the list negates the operator. For example, if the Operator is Equal To and NOT is selected, the operation is Not Equal To. The Operator can be set to:
 - Contains the property selected must contain the value entered. For example, if Email is selected as the property and the value entered is yahoo, the report lists all students with an email address that contains the letters *yahoo* (billy@yahoo.com, melissa@yahoo.com). If Not is added, the report lists all email address that do not contain *yahoo* (george@gmail.com, sandra@hotmail.com).
 - Equal To the property selected must be exactly the same as the value entered. For example, if Home Language is selected as the property and the value entered is English, the report lists all students whose home language is English. If Not is added, it lists all students whose home language is not English.
 - Ends With the property selected must end with the value entered. For example, if section IDs were created with the Course and Period option and 01 is entered as the value for the section ID property in a report, the report lists all sections for period 01.
 - Greater or Equal the property selected must be greater than or equal to the value entered. For example, if Expected Graduation Year is the property and the value is 2014, the report lists all students with an expected graduation year of 2014 or later. If Not is added, the report lists only students with an expected graduation year of 2013 or earlier.
 - **Greater Than** the property selected must be greater than the value entered. For example, if **Expected Graduation Year** is the property and the value is 2014, the report lists all students with an expected graduation year of 2015 or greater.
 - In List the property selected must include one of the values entered in the Value field. Enter values separated by commas. For example, if Grade is the property and the values entered are *1, 2, 3*, the report lists all students in grades 1, 2, or 3.
 - Less Than or Equal the property selected must be less than or equal to the value entered. For example, if Age is the property and the value is 15, the report lists students 15 and younger.

- Less Than the property selected must be less than the value entered. For example, if Age is the property and the value is 15, the report lists students younger than 14 and younger.
- Starts With the property selected must start with the value entered. For example, if Enter Code is the property and the value is R, the report lists students whose enter code starts with R (R1, R2, R3).



Tip: When using dates in a condition, a full date must be entered, such as 9/1/2009. To list all students who have the same enter date, for example, **Equal To** would be used. To list all students who entered on or before a date, **Less Than or Equal** would be used.

- 6. Select the type of value to be compared from the **Type** list. It can either be a **Value** (the most common option) or a **Property**. A **Value** is the actual contents of the property, such as numbers or letters. A **Property** is the status of the property, such as an error code.
- 7. Enter the **Value** to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYY format. When using a value from a list, enter either the Code or its Description. For example, for Gender enter either **M** or **Male**. When entering a value for a property with a check box, use **Y** for checked or **N** for not checked.
- 8. Click the **Save** button at the top of the screen.

4. Condition Groups	Action	• 📀
▼ (AND)		
HomeLanguage ='Spanish'		

```
Figure 4.19 – Saved Condition
```

By default, conditions are added as an **"AND**" condition group, meaning that the records must meet all conditions in the group to be included in the query. The initial condition must always be an "AND" condition group. Once the initial condition has been added, "OR" condition groups can also be added. An "OR" condition group means that the records must meet only one of the conditions to be included in the query.

To create a condition group, check the box **New Group** when saving a new condition, and select the type of group from the **Condition Group Type** list.

Save Close			
Add Condition			(«
Condition Definition			٥
Object Property Not	Operator Type	Value	
Student 💌 HomeLangua	🔽 Starts With 👻 Value	🖌 Spanish	
Optional New Condition Group			٩
New Group? Condition Group Type			

Figure 4.20 – Add Condition Screen, Creating a New Condition Group

Groups can be nested, and an unlimited number of groups and conditions can be added to create very complicated conditions. An example of a nested condition group is shown below. This grouping means the records in the query must have a birth date less than 9/1/1995 AND a birth country containing Canada OR US.



To nest a condition group:

- 1. Click the existing condition under which to create a group.
- 2. Click the Action list, and select Add Condition to CONDITION.

4. Condition Groups	Action	٨
	Action Add Condition to BirthDate <9/1/1995' Delete BirthDate <9/1/1995' from (AND)	
Eiguro 4 22	Adding a Condition to a Condition	

Figure 4.22 – Adding a Condition to a Condition

3. In the Add Condition screen, enter the new condition.

Save	Close			
Add C	Condition			(«
Condition	Definition			
Object	Property Not	Operator Type	Value	
Student	👻 HomeLangua 🔽	👻 Starts With 👻 Value	✓ Spanish	
Optional N	New Condition Group			۵
New Group	o? Condition Group Type			
	~			
	Einen 1.00			

Figure 4.23 – Adding a Nested Condition Group

- 4. Check the **New Group** box, and select the type of group from the **Condition Group Type** list.
- 5. Click the **Save** button to create the new group with the new condition.

To add a condition to an existing condition group:

- 1. Click the group (AND) or (OR).
- 2. Click the Action list and select Add Condition to GROUP.

4. Condition Groups	Action	·	٩
 ☑ BirthDate <%/1/1995' ▼ (OR) 	Action Add Condition to (AND) Delete (AND)		
BirthCountry Contains ('Canada') BirthCountry Contains ('US')			

Figure 4.24 – Adding a New Condition to an Existing Group

In the Add Condition screen, enter the new condition, and click Save. The new condition is added to the selected group.

SORTING

The sort order is the sequence in which the records included in the query appear. If no sort order is selected, the records are sorted by the default sort order of the primary object. For example, the Student object is sorted by Last Name unless otherwise specified. To add a new sort order to the query:

1. Click the Sort tab.

Columns Conditions Sort Type in Query	
5. Define the sort output for the query	Add 🔇
X Line BOAndProperty	Sort Order
	igure 4.25 – Sort Tab

2. Click the Add button, and a new sort line is added.

Columns Cond	itions Sort Type in Query	\frown	
5. Define the sort	t output for the query	Add	
X Line BOAndF	Property Sort Order		
	× Ascending		
	Figure 4.26 Adding a Cart		

Figure 4.26 - Adding a Sort

- 3. Select the **Property** to be used for sorting from the **BOAndProperty** list. Only the properties that have been selected for use in the query on the **Columns** tab are available.
- Set the direction of the sort in the Sort Order column. Ascending sorts from smallest to largest value, or from A to Z. Descending sorts from largest to smallest, or from Z to A.
- 5. To add another property for the sort, click the **Add** button again. The sort occurs in the order in which the properties appear on the **Sort** tab. For example, the sort shown below would sort by Last Name and then First Name.

Col	umns	Conditions Sort Type in Query				
5. D	efine	the sort output for the query			Add	
$\left \times \right $	Line	BOAndProperty	Sort Order			
	1	LastName (R0.Student) 🛛 👻	Ascending	*		
	2	FirstName (R0.Student) 🛛 👻	Ascending	*		

Figure 4.27 – Multiple Sort Properties

LABELS

Labels are a special category of queries that allow queries to be printed on standard label formats. To create a label query:

- 1. Select the columns, conditions, and sort as needed to create the query.
- 2. In the **Orientation** list, select **Label**. A **Label Dimensions** tab is added to the **Query** screen.

Start Here! Enter the det	ails about your query:						_	
lame	Group	Туре	Output Type	:	Orientation		Туре	
Student Labels	Demographics	 Select 	V PDF	~	Label	*	New	

Figure 4.28 – Query Screen, Selecting Label as Orientation

3. Click the Label Dimensions tab to select and format the label.

√Query										
Start Here! Enter th	ie details abor	ut your query:								
Name		Group	Туре			tput Type	;	Orientation		Туре
Student Labels		Demographics	 Sele 	et	Y PC)F	*	Label	*	New
Description 🕎 🔇 S	tudent labels				× Y					
Columns Conditio	ons Sort T	ype in Query	abel Dimensio	ns						
Label Type										
Avery 5161 Mailing L	abels 1"x4".		*							
Label Settings				(3					
Top margi		Horizontal pitch Width	Number down							
		er across	`							
Top Margin (in.)	0.50	Label Height (in	.) 1.00							
Side Margin (in.)	0.19	Label Width (in.)	2.63							
Vertical Pitch (in.)	1.00	Number Across	3							
Horizontal Pitch (in	.)2.75	Number Down	10							
Page Size	8.5x11 Letter		~							
-			•							
Page Orientation		*								
Row Height defines system calculates i defined height of b align top and botto Row Height Row Space	the height auto lank space be	omatically. The F	Row Spacing i	s the						
Scale Fields Font S Scaling fields will a defined by the Lab	djust field plac		according to i	ihe space	e					
TO ENSURE PROP	ER PRINTING I	READ THIS FIRS	г	(2					
After clicking the P reader under Page 1. "Page Scale" sh 2. "Auto-Rotate an	e Handling: iould be set to	"None"		e PDF						
Failure to have the labels.	se values set	properly may re	sult in misaligi	ned						

Figure 4.29 – Query Screen, Label Dimensions Tab

- Select the type of labels to be used from the Label Type list. Labels are defined in Synergy SIS > System > Setup > Label Detail. For more information about defining labels, see the Synergy SIS – System Administrator Guide.
- 5. **Top Margin, Label Height, Side Margin, Label Width, Vertical Pitch, Number Across, Horizontal Pitch, Number Down, Page Size** and **Page Orientation** should be adjusted only if printing custom labels or if after testing the commercial labels need a slight adjustment.
- 6. To specify how much space each of the fields in a row should take on a label, enter the value in the **Row Height** box. **Row Space** specifies how much white space is placed between each row. If these values are blank, the system calculates the height automatically.
- 7. To have the fields in the label shrink or expand to fit the selected label size, check the **Scale Fields** box. A minimum **Font Size** can also be specified.

8. When printing the PDF File that is created by the query, be sure to change the Page Handling settings before printing the labels. Change the **Page Scaling** to **None**, and uncheck the **Auto-Rotate and Center** box.

Print	×
Printer	
Name: Brother MFC-9440CN Printer	Properties
Status: Ready	Comments and Forms:
Type: Brother MFC-9440CN Printer	Document and Markups
Print Range	Preview: Composite K 8.5 X
Reverse pages	
Page Handling Copies: 1 - Collate	11
Page Scaling: None	
Choose Paper Source by PDF page size	
Print to file	Document: 8.5 x 11.0 in
Print color as black	Paper: 8.5 x 11.0 in 1/1 (1)
Printing <u>T</u> ips <u>Ad</u> vanced	OK Cancel

Figure 4.30 – PDF Print Options

SAVING A QUERY

While the information selected on the Columns, Conditions & Sort tabs is different for every query, the basic information recorded at the top of the Query screen needs to be saved for every query. To save a query:

1. Enter a short name for the query in the **Name** box.

Save Open Execute	Delete Clear All S	ave as Report		Status: Read	dy 🖂 🔂 🕑
√Query					~
Start Here! Enter the detail	s about your query:				()
Name	Group	Туре	Output Type	Orientation	Туре
		 Select 	Y PDF	Label	 New
Description 🕎 🥥			CAllow Resu	Its To Be Edited	
-	Eia	uro 1 21 Ouony S	roon		

Figure 4.31 – Query Screen

- 2. A longer explanation of the query can be entered in the **Description** field.
- 3. Select the **Group** to be assigned to the query from the list. The Group is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in Chapter Six of this guide.
- 4. Select the **Type** of query. **Select** returns a row for each record. For example, a query based on student enrollment might return five results for a student who has been in the district five years. **Select Distinct** returns a single occurrence for this student. **Filter** creates a filter that combines multiple fields (for example Grade and Gender) or uses data that is not generally displayed on a given screen.
- 5. The **Output Type** shows the default output format for the query, and it can be changed to any of the following by clicking the list:
 - TIFF Image a graphics file
 - CSV a comma-separate values file

If you select CSV, additional fields appear.

Output Type Orientation Type CSV Portrait New
CSV Portrait New
^

Figure 4.32 – Query Screen, CSV Output Type Selected

Select the **Delimiter** to be inserted between fields. If you select **Other**, enter the desired character in the **Other Delimiter** box. Check the **Suppress Header** box if you want to omit the header row from the output file, and check the **Fixed Length** box if you want to make all columns in the output the same size, regardless of the data in them.

• Excel – a Microsoft Excel version 1997-2003 format file

• HTML – a web page in the standard Synergy SIS format

If you select **HTML**, the **Allow Results To Be Edited** check box enables you to see the query results in an editable grid. You can change values and click the Add button to add rows. Click **Save** to save your changes to the database.

VQuery Results Editable							
Que	ery Re	sults (Editable)				Add	
×	Line	Student Name	Birth Country				
	1	Abbott, Billy C.	United States	*			
	2	Abernethy, Anne E.	United States	~			
	3	Acevedo, Andrew	Mexico	*			
		Acevedo, Ashley	Mexico	*			
		Eigure 4.33 - Overy Results Ec	litable Sci		•		

Figure 4.33 – Query Results Editable Screen

- **PDF** a Portable Document Format for Adobe Reader
- Rich Text a document file (basically Microsoft Word format)
- Text File a plain text file with no formatting, in tab-delimited format

If you select **Text File**, you can check the **Suppress Header** box to omit the header row from the output file, and check the **Fixed Length** box if you want to make all columns in the output the same size, regardless of the data in them.

- XML an extensible markup language file
- 6. Select the **Orientation** to be used in the printed output, either **Landscape** or **Portrait**. The **Labels** orientation is covered in the section on Labels later in this chapter.
- 7. Type a **Description** of the query. Especially if you will nominate our query for public use (see step 9), this description should be detailed.
- 8. Click the Save button at the top of the screen. The Save Query screen opens.
- 9. To nominate your query to be a public query available to all Synergy SIS users, check the **Nominate for Public** box. Public queries must be reviewed and approved by administrators before the query is listed as a public query. For more information about public queries, see the section on Managing Public Queries in Chapter Six.
- 10. To save the query to the list of queries for the logged-in user, click the **Save** button.

Save Undo			Form	Status: Ready (Update Mode)			
Save Query				(«			
Query Details							
Name	Group	Туре	Output Type	Nominate For Public			
Birth Verification Field Blank	Demographics	Select	👻 PDF 💙				
Description 🕎 📀							
This query will produce a list of students who have nothing selected in 📕							
<u> </u>			V				
Fi	gure 4.34 – 3	Save Quei	ry Screen				

SAVING A QUERY AS A REPORT

Query & Reporting Guide

Queries can also be saved as reports. This has advantages: The report can be run by anyone with access to the report, and the report interface is easier to use than the query interface. Reports can also be scheduled to be run at regular intervals. For more about working with reports, see Chapter Two. To save a query as a report:

1. At the top of the **Query** screen, click the **Save As Report** button. The **Save User Report** screen opens.

Save Open Execute Delete	Clear All Save as Re	eport		Form St	atus: Ready (Update	• Mode) 🖓 🔯
∀Query						«
Start Here! Enter the details ab	out your query:					۵
Name	Group	Туре	Output Ty	pe Orientation	Туре	
Student Alpha w Teacher	Scheduling - Current	 Select 	MTML	Portrait	Vser User	
Description 🕎 🔇 Student Alpha	w Teacher					
	Liquino 1 25 Our	Saraa	n Sava An E	Papart Button		

Figure 4.35 – Query Screen, Save As Report Button

2. Enter the name of the report as it should appear in the User PAD Tree in the **Report Name** field. Enter an ID for the report in the **Report ID** field.

Save Undo
Save User Report
User Report Options 🔹
Saving a query as a user report provides the ability to make query reports executeable via the same simple RI just like all existing system reports. The reports can then be modified via the RT Edit (the end user rreport designer). Upon save, a named report will be created in the PAD tree under your UserReports PAD group.
Namespace
UD
Report Name
Student Alpha with Teacher
Report ID "U" + STTCH101
Overwrite Existing Report Layout (RPX)
Cverwrite Existing Query Data (Extract Data)
The Location of Report in PAD determines exactly where the report resides in the PAD tree relative to the localized PAD node (if your locale is USA.AZ.MyDistrict, the report, by default, if no value is entered, will be located in the node MyDistrict). Example values: StudentReportSUIst
Location of Report In PAD
Student\Reports\List

Figure 4.36 – Save User Report Screen

- 3. If a report exists with the same Report ID, select whether or not to Overwrite the Existing Report Layout and to Overwrite the Existing Query Data by checking or unchecking the boxes. The report layout is the information defined by the output type and the customization of the properties in the Step 3 grid. The query data is the actual properties selected.
- 4. Select where to save the report in the User PAD tree by entering the folder structure in the **Location of Report in PAD** box. To indicate subfolders, separate folder names with a \. For more information about the User PAD Tree, see the section on Managing User-Defined Reports in Chapter Six.
- 5. Click **Save** to save the report.

OPENING A QUERY

Two types of queries are available when opening a query. A user can open any query they have personally saved in their list of queries, or a public query can be opened. To open a query:

1. Click the **Open** button at the top of the **Query** screen.

					~
out your query:					6
Group	Туре	Output Ty	/pe Orientation	Туре	
	 Select 	HTML	 Portrait 	Vew New	_
	out your query: Group	Group Type	Group Type Output Ty	Group Type Output Type Orientation	Group Type Output Type Orientation Type

Figure 4.37 – Query Screen, Open

 The Query Open screen opens. The first tab is My Queries, which lists all queries the current user has saved. To filter the list of queries, select the Group and/or Type of query and click the Filter button.

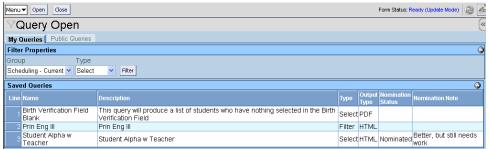


Figure 4.38 – Query Open Screen, My Queries Tab

- 3. To open a query from the current user, click the query and click the **Open** button.
- 4. To select a query that has been saved for everyone to use in Synergy SIS, click the **Public Queries** tab.

Menu 🗸 Open Close	F	orm Statu	s: Ready (Upd	ate Mode) 段
VQuery Open				
My Querie Public Que	ries			
Filter Properties				Ğ
Group Ty	pe Include Product Owned			
Saved Queries				()
Line Name	Description	Type	OutputType	UserName
1 40th Day Audits	Audit Services will use this list to verify information for the 40th day audits	Select	PDF	Weathers, Bob
5th/6th Grade 2 Varicella History/Vac.	This report will list all 5th and 6th Grade students who have a history of Varicella, a vaccination date or an exemption listed. Can be changed to show other grade levels.	Select	PDF	Weathers, Bob
3 6th Grade Labels	Labels for 6th grade students going to Jr. High. Check the Hide column for the information you do NOT want to appear.	Select	PDF	Wilson, Rob
4 7th Grade Labels	Labels for 7th grade students by previous school. Hide columns you do not want to see.	Select	PDF	Wilson, Rob

Figure 4.39 – Query Open Screen, Public Queries Tab

- 5. To filter the list of public queries, select the **Group**, **Type**, and/or **Include Product Owned** and click the **Filter** button.
- 6. To open a public query, click the query and click the **Open** button.

DELETING A QUERY

To delete a query from the list of saved queries for the current user:

1. Click the **Open** button at the top of the **Query** screen.

(«					
					Query
6				tails about your query:	Start Here! Enter the deta
on Type	e Orientation Type	Output Typ	Туре	Group	Name
Vew New	🖌 Portrait 🛛 🔽 New	HTML	 Select 		
New	Yew Portrait		Select		Description 嘢 📀

Figure 4.40 – Query Screen, Open

2. The **Query Open** screen opens. Select the query to be deleted from the list of **Saved Queries**, and click the **Open** button.

Menu Vopen Close				Form Status: R	eady (Update Mode) 🛛 🔊 🎽
VQuery Open					(<
My Queries Public Queries					
Filter Properties					6
Group Type Scheduling - Current Select	Filter				
Line Name	Description	Туре		Nomination Status	Nomination Note
Birth Verification Field Blank	This query will produce a list of students who have nothing selected in the Birth Verification Field	Select	PDF		
2 Prin Eng III	Prin Eng III	Filter	HTML		
3 Student Alpha w Teacher	Student Alpha w Teacher	Select	HTML		Better, but still needs work

Figure 4.41 – Query Open Screen, My Queries Tab

3. Click the **Delete** button at the top of the **Query** screen.

Save Open Execute De	lete Clear All Sa	ave as Report		Form Status: Ready (Update Mode)
√Query				
Start Here! Enter the details	about your query:			
Name	Group	Туре	Output Type	Orientation Type
Prin Eng III		✓ Filter	🗸 HTML 🗸	Portrait 🛛 🖌 User
Description 🕎 🏈 Prin Eng III				
Columns Conditions Sor	t Type in Query			
Step 1. Select the Business	Objects	(Objects Action	🛛 🕥 Step 2. Select the Properties 🕥
Line Name			Section	Line Name Type
CALPADSStudentEnro	llmentODS (K12.CA	CALPADS)	🗢 StaffSchoolYear	
2 CALPADSStudentEnro	llmentStDtDeleted (<12.CA.CALPADS)	🔝 Staff	
3 Course (K12.CourseIn	ío)		CourseSchool	
4 GBDistrictMassSync (k	(12.Gradebookinfo)		Course	
5 Parent (K12.ParentGu	ardianIn)		Course	
6 SchedulingMatrix (K12)	.Scheduleinfo.Mas)		
7 School (K12)				
8 Staff (K12)				
9 Student (K12)				

Figure 4.42 – Query Screen, Deleting

Chapter Five: ADVANCED QUERIES

In this chapter, the following topics are covered:

- ► How to create a query using a Link Field
- ► How to create a query using multiple business objects
- ► What is the Literal property
- ► How to edit the query manually

CREATING A QUERY USING A LINK FIELD

Queries can be created from multiple business objects by linking the business objects via a common property. The common property is referred to as a Link Field. To create a query from multiple business objects using a link field:

1. In the **Step 1. Select the Business Object** grid, select the business object to be used in the query by clicking the name of the object. Since a limited number of business objects are shown by default, it may be helpful to view all business objects by checking the **Show All Business Objects** box.

Columns Conditions Sort Type in Query		
Step 1. Select the Business Objects 🔇	Objects Action 🔇	Step 2. Select the Properties 🥥
Line Name		Line Name Type
AbsenceCountFB (K12.AttendanceInfo.R)		
2 ADMByDaysOfYearRI (K12.AttendanceInfo.R)		
3 AttendanceCalendar (K12.AttendanceInfo.S)		
4 AttendanceCalendarAuditRI (K12.AttendanceInfo.R)		
5 AttendanceCalendarGradeOverride (K12.AttendanceInfo.S)		
6 AttendanceCalendarOpt (K12.AttendanceInfo.S)		
7 AttendanceCalendarWeek (K12.AttendanceInfo.S)		
8 AttendanceLetterRI (K12.AttendanceInfo.R)		
9 AttendanceScanningHold (K12.AttendanceInfo.S)		
10 AttendanceSheetCreation (K12.AttendanceInfo.S)		
1 <u>2 3 4 5 6 7 8 9 10</u> (>)		Show All Properties
I▼ Show All Business Objects		
Add Literal		

Figure 5.1 – Select the Business Objects

 The selected object appears in the **Objects** list, and the properties associated with the s object appear in the **Step 2. Select the Properties** grid. Select the properties to be used in the query by clicking the properties. To show all properties associated with this business object, check the **Show All Properties** box.

Columns Conditions Sort Type in Que	ery					
Step 1. Select the Business Objects 🛛 🔇	Objects	Action	- 6	S	tep 2. Select the Properties	٥
Line Name	🔻 ClassStu	udent			ine Name	Туре
ClassStudent (K12.ScheduleInfo)					Add Date Time Stamp	Date
					2 Add ID Stamp	Link Field
					3 Change Date Time Stamp	Date
					4 Change ID Stamp	Link Field
					5 Enter Date	Date
					6 Leave Date	Date
					7 Qualifies For Alt Funding	Drop Down
					8 Section GU	Link Field
					9 Student Class GU	Link Field
					10 Student School Year GU	Link Field
Show All Business Objects					1 <u>2</u> (>>)	
					Show All Properties	

Figure 5.2 – Select the Properties

 Note that certain properties appear in beige in the list of properties. These are Link Fields that link to another business object. In the example shown above, the Link Field links to the Section business object. 4. When a **Link Field** is clicked and added to the query, the property is added to the Step 3 grid as usual. However, a new business object is also added to the list of objects in the middle of the screen underneath the original business object.

Columns Conditions Sort Type in Query			
Step 1. Select the Business Objects 🛛 🔇	Objects Action 💌 🔇	Step 2. Select the Properties	4
Line Name	▼ ClassStudent	Line Name Type	
ClassStudent (K12.ScheduleInfo)		Add Date Time Stamp Date	
		2 Add ID Stamp Link Fie	ld
		3 Change Date Time Stamp Date	
		4 Change ID Stamp Link Fie	ld
		5 Enter Date Date	
		6 Leave Date Date	
		7 Qualifies For Alt Funding Drop Do	own
		8 Section GU Link Fie	ld
		9 Student Class GU Link Fie	ld
		10 Student School Year GU Link Fie	ld
Show All Business Objects		1 <u>2</u> (>>)	
		Show All Properties	

Figure 5.3 – Selecting a Link Field

5. Properties associated with the new business object can be added to the query as well by clicking the new business object in the **Objects** list. The Step 2 grid changes to show the properties for the new business object. These properties can be selected by clicking as usual.

Line Name Type 1 ClassStudent (K12.ScheduleInfo) SchoolYearSectionAbsenceTrack (K12.AttendanceInfo) Add Date Time DATETIMI 2 SchoolYearSectionAbsenceTrack (K12.AttendanceInfo) Add Date Time DATETIMI 3 SchoolYearSectionAbsenceTrack (K12.ScheduleInfo) Add Date Time DATETIMI 4 SchoolYearSectionMetDay (K12.ScheduleInfo) Additional Staff Drop 5 SchoolYearSectionKetDay (K12.ScheduleInfo) Additional Staff Drop 6 Section (K12.ScheduleInfo) SchoolYearSectionKetDay (K12.ScheduleInfo) Number 6 Section (K12.ScheduleInfo) AideTotalStudents Number 7 AideTotalStudents1 Number 8 AideTotalStudents3 Number 9 AideTotalStudents4 Number 9 AideTotalStudents4 Number	Step	1. Select the Business Objects 🥥	Objects Action	٢	Step 2. Select the Propert	ties 🗳
2 SchoolYearSectionAbsenceTrack (K12 AttendanceInfo) 2 Add ID Stamp Link Field 3 SchoolYearSectionGradingTrack (K12 GradeInfo) 2 Add ID Stamp Link Field 3 SchoolYearSectionGradingTrack (K12 GradeInfo) 3 Attendance Down 4 SchoolYearSectionStaff (K12 ScheduleInfo) 0 0 Field Additional Staff Drop 5 SchoolYearSectionStaff (K12 ScheduleInfo) 6 Aide Total Students Number 6 Section (K12.ScheduleInfo) 6 Aide Total Students Number 6 Section (K12.ScheduleInfo) 6 Aide TotalStudents2 Number 7 AideTotalStudents2 Number 8 AideTotalStudents2 Number 7 Show All Business Objects 9 AideTotalStudents3 Number	Line	Name	▼ ClassStudent		Line Name	Туре
SchoolYearSectionGradingTrack (K12.GradeInfo) Additional Staff Drop 4 SchoolYearSectionMetDay (K12.ScheduleInfo) Down 5 SchoolYearSectionStaff Down 6 Section (K12.ScheduleInfo) Additional Staff Drop 6 SchoolYearSectionStaff Gades Down 7 Aide Total Students Number 7 Aide Total Students Number 8 AideTotalStudents Number 9 AideTotalStudents Number	1		▼ Section			DATETIM
3 (K12.Gradelnfo) 3 Attendance Down 4 (K12.ScheduleInfo) 4 Additional Staff Drop 5 SchoolYearSectionStaff 5 Aide Max Students Number 6 Section (K12.ScheduleInfo) 5 Aide Total Students Number 6 Section (K12.ScheduleInfo) 7 AideTotal Students Number 7 AideTotal Students1 Number 8 AideTotalStudents2 Number 7 Show All Business Objects 9 AideTotalStudents3 Number	2	(K12.AttendanceInfo)			2 Add ID Stamp	Link Field
4 (K12.ScheduleInfo) 4 Grades Down 5 SchoolYearSectionStaff 5 Aide Max Students Number 6 Section (K12.ScheduleInfo) 7 Aide Total Students Number 7 AideTotalStudents1 Number 8 AideTotalStudents2 Number 9 AideTotalStudents3 Number	3					
b (K12.ScheduleInfo) 6 Aide Total Students Number c Section (K12.ScheduleInfo) 7 Aide Total Students 1 Number c Schow All Business Objects 9 AideTotalStudents3 Number	4					
6 Section (K12.ScheduleInfo) 7 Aide Total Students 1 Number 7 Aide Total Students 2 Number 8 Aide Total Students 2 Number Show All Business Objects 9 Aide Total Students 3 Number	5					
Show All Business Objects Aide Total Students3 Number	6	,				
V SHOW AII BUSITESS OUJEUS					8 AideTotalStudents2	Number
	z sh	ow All Business Objects			9 AideTotalStudents3	Number
					10 AideTotalStudents4	Number

Figure 5.4 – Selecting Properties for a New Business Object

- 6. To switch back to the list of properties for the original business object, click the first business object in the **Objects** list.
- 7. To remove a business object from a query, click the business object in the **Objects** list, click the **Action** list, and click **Delete**.

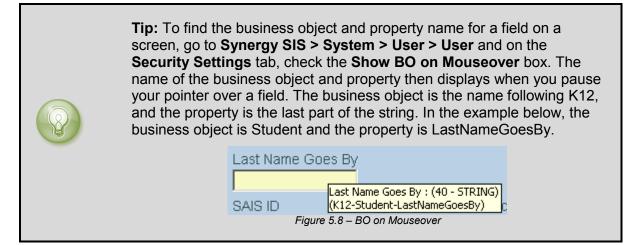


8. When a link field is added to a query, it is strongly recommended to check the **Hide** box to omit it from the query results.



While the field is essential to the query to tie the business objects together, the data contains in the link field is generally a several-digit hexadecimal number that does not add meaning to the results.





CREATING A QUERY USING MULTIPLE BUSINESS OBJECTS

Queries can also be created from multiple business objects by selecting related objects from Step 1. These objects are still linked in the background by a link field, but the link field is not added to the list of properties. To create a query from multiple business objects using Step 1:

 In the Step 1. Select the Business Object grid, click the business object to be used in the query. Since a limited number of business objects are shown by default, it may be helpful to view all business objects by checking the box Show All Business Objects.

Columns Conditions Sort Type in Query		
Step 1. Select the Business Objects 🔇	Objects Action 🔽 📀	Step 2. Select the Properties 🔇
Line Name		Line Name Type
CALPADSStudentEnrollmentODS (K12.CA.CALPADS)		
2 CALPADSStudentEnrollmentStDtDeleted (K12.CA.CALPADS)		
3 Course (K12.CourseInfo)		
4 GBDistrictMassSync (K12.GradebookInfo)		
5 Parent (K12.ParentGuardianIn)		
6 SchedulingMatrix (K12.ScheduleInfo.Mas)		
7 School (K12)		
8 Staff (K12)		
9 Student (K12)		
Show All Business Objects		🗖 Show All Properties
Add Literal		

Figure 5.9 – Select the Business Objects

 The selected object appears in the **Objects** list, and the properties associated with the selected business object appear in the **Step 2. Select the Properties** grid. Select the properties to be used in the query by clicking the properties. To show all properties associated with this business object, check the box **Show All Properties**.

Columns Conditions Sort Type in Query							
Step 1. Select the Business Objects 🛛 🔇	Objects Action 🔽 🕥	Step 2. Select the Properties	٥				
Line Name		Line Name	Туре				
ChildProgParticipation (K12.ProgramInfo)		Add Date Time Stamp	Date				
2 ELL (K12.ProgramInfo)		2 Add ID Stamp	Link Field				
3 ELLAssessment (K12.Programinfo)		3 Address	Text				
4 ELLComment (K12.ProgramInfo)		4 Address Chg Date	Date				
5 ELLHistory (K12.ProgramInfo)		5 AddressValidationFlag	Text				
6 ELLParentHistory (K12.ProgramInfo)		6 Age	Number				
7 ELLWaiver (K12.ProgramInfo)		7 AKA First Name	Text				
8 Emergency (K12.EmergencyInfo)		8 AKA Last Name	Text				
9 Enrollment (K12.SASixp)		9 AKA Middle Name	Text				
10 FSStudent (K12.CA)		10 AKA Suffix	Text				
1234567 📎		1 <u>2 3 4 5 6 7 8 9</u>	<u>10</u> (>>)				
🗖 Show All Business Objects		E Show All Properties					
Add Literal							

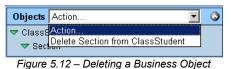
Figure 5.10 - Select the Properties

3. Note that when the business object was selected, the list of business objects shown in the Step 1 grid changed. This new list of business objects shows all business objects related to the initial business object. To add one of these business objects to the query, click the object in the Step 1 grid. The new business object is added to the list of objects underneath the original business object.

Columns Conditions Sort Type in	Query	_		
Step 1. Select the Business	Objects Action		Step 2. Select the Properties	<u>()</u>
Ubjects	▼ Student		Line Name	Туре
Line Name	Emergency		1 Add Date Time Stamp	Date
1 Emergency (K12.EmergencyInfo)	· Emergeney		2 Add ID Stamp	Link Field
			3 Address	Text
			4 Change Date Time Stamp	Date
			5 Change ID Stamp	Link Field
			6 City	Text
			7 Extn	Text
			8 Home Phone	Phone
			9 Language	Drop Down
Show All Business Objects			10 Name	Text
			1 <u>2 3</u> (>)	
			C Show All Properties	

Figure 5.11 – New Business Object Added

- 4. To add another related business object from the first business object, click the first business object and select another object. If there are related objects to subsequent objects, those can also be added in the same fashion.
- 5. To remove a business object from a query, click the business object in the **Objects** list, click the **Action** list, and click **Delete**.



6. Properties from any object in the **Objects** list can be added to the query by clicking the object in the list and selecting the properties from the Step 2 grid.

Tip: When working with multiple business objects, selecting the initial business object is critical. Not all business objects are linked, so a desired business object may not be available for linking if the incorrect business object is selected first. For example, to create a query with information about a section and the students enrolled in the section, the ClassStudent object or StudentClass object should be selected first and not the Student object.

THE LITERAL PROPERTY

A special type of property can be added to queries called the Literal property. The Literal property adds a fixed text value as a column to any query. To add a literal property:

1. With at least one object in the **Objects** list, click the **Add Literal** button under the Step 1 grid. A new property line is added to the Step 3 grid.

Step 1. Select the Business Objects 🛛 🖓	Objects Action 💽 🔇	Step 2. Select the Properties					
Line Name	▼ Student	Line Name	Туре				
ChildProgParticipation (K12.ProgramInfo)		Add Date Time Stamp	Date				
2 ELL (K12.ProgramInfo)		2 Add ID Stamp	Link Field				
3 ELLAssessment (K12.ProgramInfo)		3 Address	Text				
4 ELLComment (K12.ProgramInfo)		4 Address Chg Date	Date				
5 ELLHistory (K12.ProgramInfo)		5 AddressValidationFlag	Text				
6 ELLParentHistory (K12.ProgramInfo)		6 Age	Number				
7 ELLWaiver (K12.ProgramInfo)		7 AKA First Name	Text				
8 Emergency (K12.EmergencyInfo)		8 AKA Last Name	Text				
9 Enrollment (K12.SASlxp)		9 AKA Middle Name	Text				
10 FSStudent (K12.CA)		10 AKA Suffix	Text				
1 2 3 4 5 6 7 🛞 1 2 3 4 5 6 7 8 9 10 📎							
Show All Business Objects		🗖 Show All Properties					
Add Literal							

2. In the **Name** column, enter the text that will appear in the query results. Modify the rest of the property values as usual.

Step 3. Provide any desired property overrides										
X Line Name Label Override Order Width Hide Group Break Display										
□ 1 Text										
	Figure 5.14 – Editing the Literal Property									

EDITING THE QUERY MANUALLY

Occasionally it may be advantageous to edit a query manually. For example, with a query that has a condition with a date, the date may need to be changed each time the query is run. To edit a query manually:

1. Click the **Type in Query** tab.

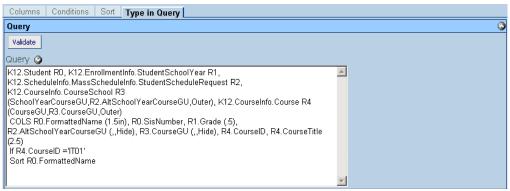


Figure 5.15 – Type in Query Tab

- 2. In the **Query** box, change the text as necessary. In the example above, the query runs for a specific Course ID. To run the query for a different course, it would be necessary to change the Course ID.
- 3. Click the Validate button to ensure that the query is valid.

In text format, each query has four sections – one defining the business objects, one listing the properties, the conditions, and the sort. The conditions and the sort sections are optional, but every query must have the business objects and properties sections.

The Business Object Section

The format for the business object section is

BusinessObject R#, BusinessObject R# (LinkField,R#LinkField,)

Each business object is assigned a sequential number following the letter R. When the business object is referred to in the rest of the query, it is referred to by the R#.

When a business object is linked to another business object using a Link Field, the business object is following by the names of the link fields which tie the objects together. The first link field is the field in the current business object, and the second link field is the link field from the other business object preceded by its R#

An example of a business object section is:

K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1, K12.ScheduleInfo.Section R2 (SectionGU,R1.HomeroomSectionGU,), K12.Setup.SchoolRoom R3 (RoomGU,R2.RoomGU,)

The Properties Section

The format for the properties section is:

COLS R#.PropertyName, R#PropertyName (Width,LabelOverride,Hide,GroupBreak,Group#)

The properties section must be preceded by the word COLS. R# indicates the business object from where the property comes.

If any property overrides have been defined for the property, they are listed in the order indicated above in parenthesis following the property name. If a property override is not used, a space is used instead. The Hide override is either blank or the word Hide to turn on the Hide function. The break is GroupBreak, PageBreak, or blank. The Group value is the word Group followed by the number of the group. The Label Override value is surrounded by single quotes.

An example of a properties section is:

COLS R0.FormattedName, R0.BirthVerification (,,Hide), R1.EnterDate, R1.EnterCode, R1.HomeroomSectionGU (,,Hide), R2.RoomGU (,,Hide), R3.RoomName (.1,'GU',Hide,GroupBreak,Group1)

The Conditions Section

The format for the properties section is:

IF R#.PropertyName Operator Value AND R#.PropertyName Operator Value

Operators can be In, Start/StartsWith, Contain/Contains, End/EndsWith, =, <, >, <=, >=, !=, <>, or NOT. The condition groups are indicate with AND/OR. Values are surrounded with single quotes. Parentheses are used to group nested conditions.

An example of a conditions section is:

If R4.CourseID ='IT01'

The Sort Section

The format for the properties section is:

Sort R#.PropertyName, R#.PropertyName Desc

The section always starts with Sort. The properties are listed in the order in which they are sorted, separated by commas. The sort is ascending unless followed by Desc.

An example of a sort section is:

Sort R0.FormattedName

A quick refresher guide on the format for queries is also available in the **Query Guide** section at the bottom of the **Type in Query** tab.

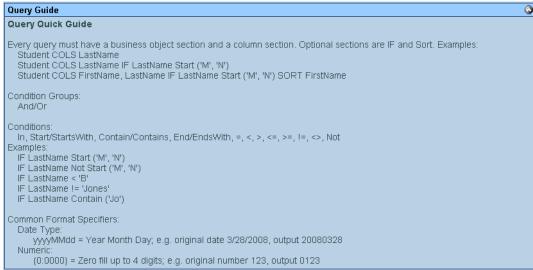


Figure 5.16 – Query Guide

Chapter Six: QUERY & JOB QUEUE ADMINISTRATION

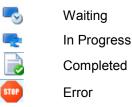
In this chapter, the following topics are covered:

- ► How to manage jobs in the Job Queue
- ► How to set up Query groups
- ► How to manage Public Queries
- ► How to manage User-Defined Reports

JOB QUEUE

Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in Synergy SIS > System > Job Queue > Job Queue Viewer and Synergy SIS > System > Job Queue > Job Q Adm Viewer. The Job Queue Viewer lists all jobs submitted by the user currently logged in to Synergy SIS, and the Job Q Adm Viewer lists all jobs regardless of user. Both allow the jobs to be deleted, the results of the job to be printed, and the details of the job to be viewed.

In the **Job Queue Viewer**, each job is listed with the date and time the job was submitted, and the date and time the job completed. The state of the job is also indicated by an icon, as shown below:



Job C	ob Queue Contents for User: Admin User											
Current												
Job II)	Begin Date I	End Date Stat	e	s	erver Name	;	Show Recurring				
Del	ete Joł	bs State Selection	~		,							
Jobs	in Q	lueue							Show Detail 🔇			
×	Line	Date Submitted 🛛 🗧	Completed	\Rightarrow	State ᇢ	Job ID	\Rightarrow	Description	🔶 Result			
	1	05/01/2011 22:16:09	05/01/2011 22:16:1	7		ATP410		Summer Attendance Report				
	2	05/01/2011 22:05:51		l	STOP	ATP603		Positive Attendance Summary	P			
	3	05/01/2011 21:46:11	05/01/2011 21:46:19	9		STU409		Class Roster				
	4	05/01/2011 21:41:52	05/01/2011 21:42:0	7		STU409		Class Roster				
	5	05/01/2011 21:40:47	05/01/2011 21:41:03	2		STU409		Class Roster				
	6	05/01/2011 21:40:08	05/01/2011 21:40:20	3		STU409		Class Roster				
	7	05/01/2011 21:32:01	05/01/2011 21:36:09	э		STU409		Class Roster				
	Figure 6.1 – Job Queue Viewer											

The **Job ID** and **Description** are also listed. For reports, this is the report ID and the name of the report.

To view the result of the job, click the icon in the **Result** column. The results opens in a new window, generally in PDF format.

For jobs still in progress, clicking the **Result** icon brings up the **Job Status** screen.

Check Status Later Abort		Form Status: Ready
Job Status		
Job Detail		0
Job ID Description		
STU401 Student List		
Status		٥
Waiting: This job is 2nd in the queue		
	_	
NOTE: This view will refresh regularly (until the job is complete) updating the status.		
Figure 6.2 – Job Status Screen		

On the **Job Status** screen, you can cancel the job by clicking the **Abort** button. Clicking the **Check Status Later** button closes the **Job Status** screen, but the job and its results can still be viewed from the **Job Queue Viewer** screen.

To delete a job from the queue, check the box in the X column and click the **Save** button at the top of the screen. To delete all the jobs in a particular state, select the state from the **State Selection** list and click the **Delete Jobs** button.

∀Job Queue Viewer											
Job Queue Contents for User: Admin User											
Current											
Job ID	Begin Date E	End Date	State	S	erver Name	S	Show Recurring				
		P		~			Filter				
Delete Jobs State Selection											
Jobs in Q	ueue							Show Detail 🔇			
X Line	Date Submitted 🛛 🍦	Completed		State 🈂	Job ID	\Rightarrow	Description	🔶 Result			
— 1	05/01/2011 22:16:09	05/01/2011 22:1	6:17		ATP410	s	Summer Attendance Report				
[] 2	05/01/2011 22:05:51			STOP	ATP603	F	Positive Attendance Summary	P			
		Figure 6 3	lah	O	Niewer F	Dele.	ting lobo				

Figure 6.3 – Job Queue Viewer, Deleting Jobs

To filter the list of jobs displayed, enter the criteria by which to filter and click the **Filter** button. Criteria include all or part of the **Job ID**, a range of dates from **Begin Date** to **End Date**, the **State** of the job, and the **Server Name** of the process server used to process the job. To show reoccurring jobs in the list, check the **Show Recurring** box.

∕⊽Job (∀Job Queue Viewer										
Job Queue	Job Queue Contents for User: Admin User										
Current											
Job ID	Begin Date	End Date	State	Server Name	Show Recurring						
		7		¥	Filter						
Delete Jobs	State Selection	~									

Figure 6.4 – Job Queue Viewer, Filtering

Additional information is available about each job by clicking the Show Detail button.

∛Job Queue Viewer											
Job Queue Contents for User: Admin User											
Current											
Job ID Begin Date	End Date State	e S	erver Name	Show Recurring							
Delete Jobs State Selection	~				\frown						
Jobs in Queue					Show Detail						
🗙 Line 🛛 Date Submitted 🗧	Completed	🔶 State 🔶	Job ID	⇒ Description	🔶 Result						
1 05/01/2011 22:16:09	05/01/2011 22:16:17		ATP410	Summer Attendance Report							
2 05/01/2011 22:05:51		STOP	ATP603	Positive Attendance Summary	?						

Figure 6.5 – Job Queue Viewer, Show Detail

The detailed information about each job appears to the right. To switch to another job, click the **Line** number of that job. The detail area has four tabs:

• In addition to the information shown in the main screen, the **Details** tab shows the **Result Type**, the **Job Type**, the **Date Processed**, the **Total Execution Time**, and the **Focus** from which the job was run.

♥Job Queue Viewer					
Job Queue Contents for User: Admin User					
Current					
Job ID Begin Date End Date	State S	erver Name	Show Recurring		
				Filter	
Delete Jobs State Selection					
Jobs in Queue					Hide Detail 🛛 🔕
Line Joh ID					
1 JQE603	Details Recurring Patte	ern Results Sy	stem Info		
2 JQE602	User Name State	Priority			
3 JQE601	User, Admin Complete	🖌 Normal	~		
4 STU402 5 STU402	General				()
6 STU401	Description			Result Type	
7 STU401	Jobs by Type			PDF	
8 STU401				J. 2.	
9 STU401	Job Type				
10 STU401	Reports 💌				
11 STU401	Dates				0
12 STU401	Date Submitted	Date Viewed			
13 STU401	10/10/2009 16:24:51				
14 STU401	Pate Processed	Date Complete	Total Eva	cution Time	
15 STU401	10/10/2009 16:24:59	10/10/2009 16:25:			
16 STU401	1	10/10/2009 16:20:	00 00:00:01		
17 STU401	Focus				٥
18 STU401	Hope High School 200	9-2010	Show Inactives		
19 STU401					

Figure 6.6 – Job Queue Viewer, Detailed Screen, Details Tab

• The **Recurring Pattern** tab shows the details of the schedule of any reoccurring jobs.

♥Job Queue Viewer	
Job Queue Contents for User: Admin User	
Current	
Job ID Begin Date End Date	
	Filter
Delete Jobs State Selection	▼
Jobs in Queue	Hide Detail
Line Job ID	
1 STU401	Details Recurring Pattern Results System Info
2 JQE603	User Name State Priority
3 JQE602	User, Admin Waiting V Normal V
4 JQE601	Schedule Job
5 STU402	
6 STU402	
7 STU401	Weekly 2:50 PM 10/10/2009 🃅 10/30/2009
8 STU401	Schedule Task Weekly 📀
9 STU401	Every 1 Week(s) on: 🔽 Monday 🗖 Saturday
10 STU401	
11 STU401	Tuesday 🗖 Sunday
12 STU401 13 STU401	🗖 Wednesday
13 ST0401 14 STU401	Thursday
15 STU401	Friday
16 STU401	
17 STU401	Every Hour(s) Ending at
310401	

Figure 6.7 – Job Queue Viewer, Detailed Screen, Recurring Pattern Tab

• The **Results** tab enables you to view the results of the job by clicking the icon, just as on the main screen. To have the results display prompt to save or open the results file, check the **Force Download Prompt** box.

√Job Queue Viewer			
Job Queue Contents for User: Admin User			
Current			
Job ID Begin Date End Date	State Server Name	Show Recurring	
		Filter	
Delete Jobs State Selection			
Jobs in Queue			Hide Detail 🔇
Line Job ID			
1 STU401	Details Recurring Pattern Results	System Info	
2 JQE603	User Name State Priority		
3 JQE602	User, Admin Complete 🔽 Normal	×	
4 JQE601	Force Download Prompt		
5 ST0402			
6 STU402	Job Result Files		Add 🔇
7 STU401	X Line Result	Description	
8 STU401			
9 STU401		Jobs by Type	
10 STU401			

Figure 6.8 – Job Queue Viewer, Detailed Screen, Results Tab

The System Info tab shows the name of the process server used to process the job. If the job is still in progress, the Progress field shows how much has been processed. If the job encountered an error, the top part of the error message is displayed in the Progress Message field. The Process Queue GU and Job Primary BO are for developers, and show the ID of the job in the process queue and the primary business object for the job.

√Job Q	ueue Viev	wer						
Job Queue Ci	ontents for User:	Admin User						
Current								
Job ID	Begin Date	End Date	State	Server Nam	ne S	Show Recurring	1	
				~			Filter	
Delete Jobs	State Selection	~						
Jobs in Queu	ie							Hide Detail 🔇
Line Job ID								
1 STU401			Details Rec	urring Pattern Resu	ilts Syste	em Info 📃		
2 JQE603	l		User Name S	State Pric	ority			
3 JQE602			User, Admin	Error 🔽 Nor	mal	*		
4 JQE601			Process Servi	1 0				<u>()</u>
5 STU402				r Machine Name	Status	Progres	~	V
6 STU402				i Machine Name	Status	Progres	5	
7 STU401			SRV-TSC					
8 STU401			Progress Mess	sage 🥥				
9 STU401			2008: Invalid Da	ate String for		^		
10 STU401			Property "Origi	nalEnterDate"		▲ ▼		
11 STU401			Process Queu	e GU		Job Primary B	n	
12 STU401				6-45CA-8ED2-FEDF9	00045004	Cost many b		1
13 STU401			Trzacuzob-A45	0-40CA-0CDZ-FEDF3	0046234	1		
14 STU401			Process State	XML				0
15 STU401			Error Info					0
16 STU401								

Figure 6.9 – Job Queue Viewer, Detailed Screen, System Info Tab

Additional information can be seen by clicking the Maximize buttons for the **Process State XML** and **Error Info** sections.

Process State XML	6
Process State Xml 📀	
<rev_data_root <br="" action="QUEUE_REPORT_JOB" view_guid="A3BB2F16-9D80-4B3F-AF95-
B7A49A1A36B5">PRIMARY_OBJECT="E6FC619B-D5F8-43E6-9230-4434AD1E310E" VIEW TYPE="UNBOUND" REV_VIEW TYPE="REV_REPORT_VIEW"</rev_data_root>	
	<u> </u>
Error Xml 🧿	
Revelation.RevException Revelation.RevException	
Source: Exception, Msg: 2008: Invalid Date String for Property "OriginalEnterDate" String was not recognized as a valid DateTime.	•
Figure 6.10 – Process State XML and Error Info	

The **Process State XML** is more information for developers. The **Error Info** section shows the full text of the error message.

To close the detail area, click the **Hide Detail** button.

⊘ Job G	ueue Vie	wer						
Job Queue C	ontents for User	Admin User						
Current								
Job ID	Begin Date	End Date	Sta	ate Serv	er Name	Show Recurring		
				×			Filter	
Delete Jobs	State Selection	· ·						\frown
Jobs in Que	ue							Hide Detail
Line Job ID								
1 STU401	1		Details	Recurring Pattern	Results	System Info		

Figure 6.11 – Job Queue Viewer, Hide Detail button

JOB QUEUE ADMIN

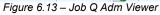
The Job Queue is administered from the **Job Q Adm Viewer** screen. This screen has all of the same functionality and features of the **Job Queue Viewer** screen. However, all jobs from all users are listed. In addition, the **Job Q Adm Viewer** enables you to adjust the priority of each job.

The main purpose of the admin viewer is to diagnose problems with the queue and to adjust the status of jobs waiting in the queue. When users report that the job is listed 2nd, 3rd, 4th, and so on in the **Job Status** screen, there may be a problem with the job queue.

Check Status Later Abort		Form Status: Ready
Job Status		
Job Detail		٨
Job ID Description		
STU401 Student List		
Status		٨
Waiting: This job is 2nd in the queue	<u>▲</u> ▼	
NOTE: This view will refresh regularly (until the job is complete) updating the status.		
Figure 6.12 – Job Status Screen		

When viewed from the admin viewer, three additional columns of information about jobs are listed: the **Priority**, the **Process Server Machine Name**, and the **User Name**.

Y.	lob	Q Adm	Viewer										
F	Current Job ID Begin Date End Date State Server Name Show Recurring User Name +												
_	Delete Jobs State Selection												
×	Line		⇒ Completed	🖨 Total Time	Job ID 🔶	Priority 🖨	State 🚖	Description 🖨	Process Server Machine Name	⊖ User Name	Result		
		06/29/2011 13:02:04	06/29/2011	00:00:17	District Mass Sync Job ID	Normal 💌		District Mass Synchronize Grade Book	OAWEB14	Rob Wilson			
		06/29/2011 12:58:40	06/29/2011 12:59:14	00:00:33	District Mass Sync Job ID	Normal 👻		District Mass Synchronize Grade Book	QAWEB14	Rob Wilson			
		05/01/2011 22:16:09	05/01/2011 22:16:17	00:00:06	ATP410	Normal 💌		Summer Attendance Report	SRV-TSCFILES	Admin User			
		05/01/2011 22:05:51		N/A	ATP603	Normal 🗠	STOP	Positive Attendance Summary	SRV-TSCFILES	Admin User	P		
		05/01/2011 21:46:11	05/01/2011 21:46:19	00:00:07	STU409	Normal 🗠		Class Roster	SRV-TSCFILES	Admin User			
	6	05/01/2011 21:41:52	05/01/2011 21:42:07	00:00:14	STU409	Normal 🗸		Class Roster	SRV-TSCFILES	Admin User			



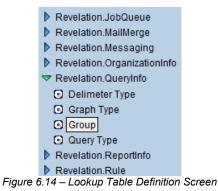
When a job is submitted by a user, it has the priority of **Normal**. If a job is still waiting that may delay the queue, the priority of the job can be switched to **Low** to allow later jobs with a priority of **Normal** to finish first. If there is an urgent job waiting, its priority can be switched to **High** to set that job to process next.

You can filter jobs by user by clicking the gray arrow next to the **User Name** field and selecting the user. All other functions are the same as the **Job Queue Viewer**.

CONFIGURING QUERY GROUPS

On the **Query** screen is a **Group** list. The values in this list are stored in a lookup table that you can modify using the **Lookup Table Definition** screen. Before creating queries in the **Query** screen, these values should be entered. These groups are also used by the **Dashboard Control** screen to categorize widgets. To modify the lookup table's values:

- 1. Go to Synergy SIS > System > Setup > Lookup Table Definition.
- 2. Under Lookup Table Maintenance, click Revelation.QueryInfo and then Group.



3. In the **Group** table, click the **Add** button to add a new code.

Nan	ne: G	roup Names	pace: Revelatio	n.QueryInfo Locked: N										
٦	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Cod													
Lo	Lookup Values Add													
~				Description 🔶	Other	Sta	e	Alt 👝	Alt Code			3tul		
×	Line	ListOrder 🔶	Code 🄤	Description 🖨		Co		Alt Code 3 🔤	SIF		Year Start	⊜	Year End €	
	1		ATT	Attendance								~	*	
	2		CHS	Course History								*	~	
	3		DIS	Discipline								*	*	
	4		GEN	Demographics								~	~	
	5		GRD	Grade Reporting								~	~	
			HLT	Health								~	~	
			LBL	Label								~	*	

- Figure 6.15 Group Lookup Table
- 4. Set the order in which values are displayed by entering numbers in the **ListOrder** column. If the numbers in the ListOrder field are the same or are all blank, the **Code** is used to sort the list, and then the **Description**.
- 5. Enter a code for the item in the **Code** column. This value must be unique.
- 6. Enter the description of the code in the **Description** column.
- 7. The **Other SIS** column is used to import data during the conversion process from another student records system. Enter the code used in the old system in this column.
- If appropriate, enter a start date and end date for the code in the Status column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is no longer available for selection for new records. For example, if a code is no longer valid for records beginning FY2014, select 2014 for the end year.

- 9. The **State Code**, **Alt Code 3**, **and Alt Code SIF** are not needed, since this information is not uploaded to the state. The **Use Code as the State Code** check box at the top of the table is also not used.
- 10. Click the **Save** button at the top of the screen.

MANAGING PUBLIC QUERIES

When users create queries that might be useful for all Synergy SIS users, they can nominate them to be shared with everyone as public queries. To manage the public queries and review the nominated queries, use **Synergy SIS > Query > Query Admin**.

The **Public Queries** tab lists all queries that have been approved for the public queries list. For each query, the following information is listed and can be edited:

Que	Query Admin													
Pul	Public Queries Nominated Queries													
Filt	ilter Properties 🔷													
Gro	Sroup Type Include Product Owned													
All	Il Public Queries													
×	Line	Open	Name	Description		Туре	0	Output Type	User Name	Product Owned	Group			
	1	Open	40th Day Audits	Audit Services will use . this list to verify	▲ ▼	Select 💌	P	PDF 🔽	Weathers, Bob	No	Miscellaneous	•		
	2	Open	5th/6th Grade Varice	This report will list all 5th and 6th Grade students	•	Select 💌	P	PDF 🔽	Weathers, Bob	No	Health	1		
	з	Open	6th Grade Labels		* •	Select 💌	P	PDF 🔽	Wilson, Rob	No	Label	1		
	4	Open	7th Grade Labels		* •	Select 💌	P	PDF 🔽	Wilson, Rob	No	Miscellaneous	1		
	5	Open	9th Grade Health Co	Elists only 9th grade student with health	<u>•</u>	Select 💌	P	PDF 🔽	Weathers, Bob	No	Health	•		

- 1. To review the query, click the **Open** button. The query opens in the **Query** screen.
- 2. Close the Query screen to return to Query Admin.
- 3. Edit the **Name** and **Description** of the query by typing in the boxes. The description often includes special instructions on how to customize the report before running it.
- 4. Do **NOT** change the **Type** of query unless you are an expert user and have good reason for doing so.
- 5. Change the **Output Type** if desired.
- 6. Skip the **User Name**, which cannot be changed.
- 7. If the query came with Synergy SIS and cannot be changed, the **Product Owned** column shows **Yes**. User-created queries are **No**. This cannot be changed.
- 8. The **Group** is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in this chapter.
- 9. Click the **Save** button at the top of the screen.

The list of queries can also be filtered to just show queries matching a specified Group and/or **Type**. The list can also be filtered by whether the query is **Product Owned**. To apply a filter, select the filter to apply and click the Filter button.

Filter Properties					
Group	Туре	Include Pro	duct Owned		
	~	~	*	Filter	
		<u> </u>			

Figure 6.17 – Query Admin Screen, Filter Properties

To delete a public query, click the box in the X column next to the query and click the Save button at the top of the screen.

$\mathbb{V}^{\mathbb{C}}$	Que	ery A	Admin									
Quer	'y Ad	min										
Pub	lic Q	ueries	Nominated Queries									
Filte	r Pro	perties	;		_		_					(
Grou	ıp		Туре	Include Product Owned								
			*	Filter								
All P	ubli	c Queri	es									6
×	Line	Open	Name	Description		Туре		Output Type	User Name	Product Owned	Group	
	1	Open	40th Day Audits	Audit Services will use this list to verify	•	Select	~	PDF 🚩	Weathers, Bob	No	Miscellaneous	1
-	2	Open	5th/6th Grade Varice	This report will list all 5th and 6th Grade students	-	Select	~	PDF 🗸	Weathers, Bob	No	Health	•

Figure 6.18 – Query Admin Screen, Deleting

To approve or reject queries that have been nominated for public:

- 1. Click the Nominated Queries tab.
- 2. To filter the list of queries shown, select the **Group** and/or **Type** and click the **Filter** button.

∀Qu	ery Admin							(«
Query Ac	min							
Public Q	Jeries Nominat	ed Queries						
Filter Pro	perties							<u></u>
Group	Ty	Filter						
Nominat	ons	_						۵
Line Ope	n Nomination Sta	te Name	Description	Туре	Output Type	Nominated By	Nomination Note	Query Group
G	Nominated	Student Alpha w Teacher	Student Alpha w Teacher	Select	HTML	User, Admin		Scheduling - Curre 💌

Figure 6.19 – Query Admin Screen, Nominated Queries Tab

- 3. To review a guery, click the **Open** button. The guery opens in the **Query** screen.
- 4. Close the Query screen to return to Query Admin.
- 5. Before approving or rejecting the nominated query, you can change the group to which the query is assigned by using the Query Group list.
- 6. Add a note regarding the nomination, if desired, by typing in the **Nomination Note** field. The note could indicate that the query needs more work before acceptance, or the reason why the query was rejected.
- 7. To approve or reject the query for the public queries, select either **Approved** or Rejected in the Nomination State column. Once approved or rejected, the query is removed from the list of nominated queries. The note and group can be changed and saved without changing the nomination state.

8. Click the **Save** button to save the changes. The **Nomination Note** and **Nomination State** appear in the user's **Query Open** screen. If the query was approved, it appears in the list of public queries. If it was rejected, it still appears in the user's list of queries but it does not appear in the **Query Admin** screen.

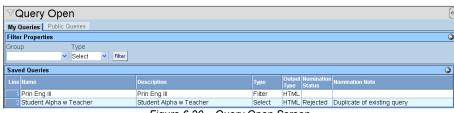
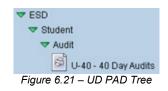


Figure 6.20 - Query Open Screen

MANAGING USER-DEFINED REPORTS

As users create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Chapter Four), the folder structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree) can require maintenance. The UD PAD tree is located above the Synergy SIS and Synergy SE folders in the Navigation Tree. The name of the top-level folder is the abbreviation of the district name (in the example below, ESD for Edupoint School District), and cannot be changed. This abbreviation is taken from the Locale as defined in the license key (USA.AZ.District Abbreviation). The folders and reports underneath this folder are created when a user saves a query as a report.



To edit and manage these folders and reports:

- 1. Go to Synergy SIS > System > Setup > UD PAD Definition.
- 2. Click triangles to expand nodes in the User Pad Tree section as needed.

VUD PAD Definition	«
PAD Definition	
User PAD Tree	Action 💌 📀
▶ Student	

Figure 6.22 – UD PAD Definition Screen

3. To modify an object, click its name.

♥UD PAD Definition		
PAD Definition		
User PAD Tree		Action 💌 🛇
▼ <u>Student</u> ▼ Audit	Name Student	
	Set Order	Q
	Line Name	
	1 Student	
	Move Up Move Down	

- 4. Edit the object's name in the Name box.
- 5. To move the object up or down in the tree, click the Move Up or Move Down button.
- 6. To add another object, click the Action list and choose Add Group to FOLDERNAME.

∀UD PAD Definition		(«	
PAD Definition			
User PAD Tree		Action 💌 🕥	
▼ <u>Student</u> ▼ Audit இ U-40 - 40 Day Audits	Name Student	Action Add Group to Student Add Report to Student Delete Student	
	Set Order	۵)	
	Line Name 1 Student Move Up Move Down		

Figure 6.23 - UD PAD Definition Screen, Action... List

7. The Add Module to UD Navigation Tree screen opens. Enter the name of the new folder in the Name box, and click the Save button.

Save Close	
Add Module to UD Navigation	Tree
Add Module Name	
Name	
Figure 6 24 – Add Module to UD Navigation	n Tree

Figure 6.24 – Add Module to UD Navigation Tree

8. To add another report to the folder, click the Action list and choose Add Report to FOLDERNAME.

♥UD PAD Definition			«
PAD Definition			
User PAD Tree			2
▼ Student ▼ Audit இ U-40 - 40 Day Audits	Name Student	Action Add Group to Student Add Report to Student Delete Student	
	Set Order	Q	2
	Line Name		
	1 Student		
	Move Up Move Down		

Figure 6.25 – UD PAD Definition Screen, Action... List

9. The Add Report to UD Navigation Tree screen opens. Select the report to add from the UD Reports list. Only previously saved user-defined reports are listed. Click the **Save** button to add the report to the tree.

Save Close	
Add Report to UD Navigation Tree	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Add User Defined Report	0
UD Departs	
UD Reports	

Figure 6.26 – Add Report to UD Navigation Tree Screen

10. To delete the folder, click the Action...list and choose Delete FOLDERNAME. A box opens to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder.

♥UD PAD Definition		(
PAD Definition		
User PAD Tree		Action 🔽 🔕
▼ Student ▼ Audit இ U-40 - 40 Day Audits	NameStudent	Action Add Group to Student Add Report to Student Delete Student
	Set Order	(
	Line Name Student Move Up Move Down	

Figure 6.27 – UD PAD Definition Screen, Action... List

11. To delete the folder, click OK. Refresh the screen when done to see the new folder structure.

Message	from webpage	×
?	Data deletion cannot be undone. Are you sure you want to delete all data for Section under Student?	
	Cancel	

Figure 6.28 – Confirming Folder Deletion

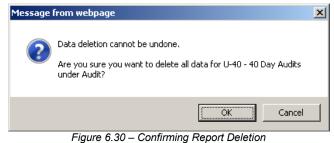
12. To modify a report, click the report to modify. On the right -side of the screen, edit the name of the report in the Name box. The Report ID can also be edited.

♥UD PAD Definition			«
PAD Definition			
User PAD Tree		Action	•
- Hodit	Name 40 Day Audits	Action Report Delete U-40 - 40 Day Audits from A U-40	sudit
	Set Order Line Name 1 U-40 - 40 Day Audits Move Up Move Down		

Figure 6.29 – UD PAD Definition, Modifying a Report

- 13. To move the report up or down in the tree, click the **Move Up** or **Move Down** button.
- 14. To delete the report, click the **Action** list and choose **Delete REPORTNAME**. A box opens to confirm the deletion.
- 15. To delete the report, click **OK**.

Refresh the screen when done to see the new folder structure.



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

To define filters and fields on the report interface:

- 1. Go to Synergy SIS > System > Data and Views > Report Interface Change.
- 2. To modify a folder, click the folder name. On the right-side of the screen, the name of the folder can be modified by editing the text in the **Name** box.

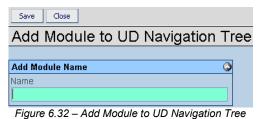
♥UD PAD Definition		
PAD Definition		
User PAD Tree		Action 💌 🛇
▼ <u>Student</u> ▼ Audit இ U-40 - 40 Day Audits	Name Student	
	Set Order Line Name 1 Student Move Up Move Down	

- 3. To move the folder up or down the tree, click the Move Up or Move Down buttons.
- 4. To add another folder underneath the folder, click the **Action** list and choose **Add Group to FOLDERNAME**. The **Add Module to UD Navigation Tree** screen opens.

♥UD PAD Definition		(«	
PAD Definition			
User PAD Tree		Action 🔽 🛇	
▼ Student Audit @) U-40 - 40 Day Audits	Name Student	Action Add Group to Student Add Report to Student Delete Student	
	Set Order	(
	Line Name 1 Student		
	Move Up Move Down		

Figure 6.31 – UD PAD Definition Screen, Action... List

5. Enter the name of the new folder in the Name box, and click the Save button.



har report to the folder, aligh the **Action** list and abases Ad

6. To add another report to the folder, click the **Action** list and choose **Add Report to FOLDERNAME**. The **Add Report to UD Navigation Tree** screen opens.

♥UD PAD Definition		(«	
PAD Definition			
User PAD Tree		Action 🔽 🔇	
▼ <u>Student</u> ▼ Audit	Name Student	Action Add Group to Student Add Report to Student Delete Student	
	Set Order	(Q)	
	Line Name Student Move Up Move Down		

Figure 6.33 – UD PAD Definition Screen, Action... List

7. Select the report to add from the **UD Reports** list. Only previously saved userdefined reports are listed. Click the **Save** button to add the report to the tree.

Save Close	
Add Report to UD Navigation Tree	«
Add User Defined Report	<u></u>
UD Reports	
×	

Figure 6.34 – Add Report to UD Navigation Tree Screen

8. To delete the folder, click the **Action** list and choose **Delete FOLDERNAME**. A box opens to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder.

♥UD PAD Definition		
PAD Definition		
User PAD Tree		Action 🔽 🔇
▼ Student ▼ Audit	Name Student	Action Add Group to Student Add Report to Student Delete Student
	Set Order	۵
	Line Name Student Move Up Move Down	

Figure 6.35 – UD PAD Definition Screen, Action... List

9. To delete the folder, click **OK**. *Refresh the screen when done to see the new folder structure.*

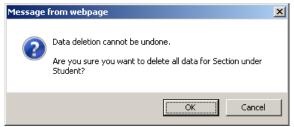


Figure 6.36 – Confirming Folder Deletion

 To modify a report, click the report to modify. On the right-side of the screen, the name of the report can be modified by editing the text in the Name box. The Report ID can also be edited.

♥UD PAD Definition					«
PAD Definition					
User PAD Tree			Action	•	٩
▼ Student ▼ Audit இU-40 - 40 Day Audits	Name 40 Day Audits	Repoi	Action Delete U-40 - 40 D	ay Audits from Audit	
	Set Order Line Name 1 U-40 - 40 Day Audits				
	Move Up Move Down				

Figure 6.37 – UD PAD Definition, Modifying a Report

- 11. To move the report up or down the tree, click the **Move Up** or **Move Down** buttons.
- 12. To delete the report, click the **Action...**list and choose **Delete REPORTNAME**.
- 13. A box opens to confirm the deletion. To delete the report, click **OK**. *Refresh the screen when done to see the new folder structure.*

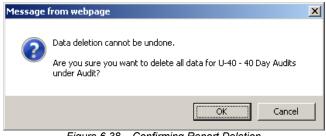


Figure 6.38 – Confirming Report Deletion

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

Chapter Seven: JOB QUEUE REPORTS

In this chapter, the following topics are covered:

- ► What are the available Job Queue reports
- ► How to customize the reports before printing

AVAILABLE REPORTS

Reports for the Job Queue are found under **Synergy SIS > System > Job Queue > Reports > Summary**.

Click the name of a report to open its interface and select the options to be used in printing the report.

Once the report options have been set, click the **Print** button. The report is printed as a PDF to the screen, which can then be sent to the printer.



Reference: This chapter covers only the customizations specific to each of the reports used in Job Queue. The options available on the other tabs are explained in Chapter Two.

JQE601 - JOB QUEUE EXECUTION TIMES

The Job Queue Execution Times report lists the amount of time it took to process each of the jobs listed in the queue. For each amount of time, it shows the number of jobs that took that long to process in the **Count** column and the percentage of jobs that represents in the **Overall** column. For example, in the first line of the report below, 87 jobs took less than 1 second to process (00:00:00), which represents 7.08% of all jobs. The threshold represents what percentage of jobs processed in that amount of time or less. For example, in the report below, 80% of the jobs processed in 15 seconds or less.

School D	and a	Job	Hope High School Queue Execution Times	Year: 2009-2010 Report JQE601
TotalTime	Count	Overall	Threshold	
00:00:00	87	7.08%	7.06%	
00:00:01	205	16.68%	23.76%	
00:00:02	141	11.47%	35.23%	
00:00:03	119	9.68%	44.91%	
00:00:04	81	6.59%	51.51%	
00:00:05	62	5.04%	56.55%	
00:00:06	61	4.96%	61.51%	
00:00:07	38	3.09%	64.61%	
00:00:08	38	3.09%	67.70%	
00:00:09	38	3.09%	70.79%	
00:00:10	24	1.95%	72.74%	
00:00:11	27	2.20%	74.94%	
00:00:12	23	1.87%	76.81%	
00:00:13	14	1.14%	77.95%	
00:00:14	17	1.38%	79.33%	
00:00:16	20	1.63%	\$0.98% Threshold: 80%	
00:00:16	12	0.98%	81.94%	
00:00:17	12	0.98%	82.91%	
00:00:18	10	0.81%	83.73%	
00:00:19	7	0.57%	84.30%	
00:00:20	5	0.41%	84.70%	
00:00:21	7	0.57%	85.27%	
00:00:22	5	0.41%	85.58%	
00:00:23	5	0.41%	86.09%	
00:00:24	5	0.41%	86.49%	
00:00:25	6	0.49%	86.98%	
00:00:26	6	0.49%	87.47%	
00:00:27	3	0.24%	87.71%	
00:00:28	2	0.16%	87.88%	
00:00:29	7	0.57%	88.45%	
00:00:30	5	0.41%	88.85%	
00:00:31	1	0.08%	88.93%	
00:00:32	2	0.16%	89.10%	
00:00:33	1	0.08%	89.18%	
00:00:34	5	0.41%	89.59%	
00:00:35	4	0.33%	89.91%	
00:00:38	6	0.41%	90.32% Threshold: 90%	
00:00:37	5	0.41%	90.72%	
00:00:38	2	0.16%	90,89%	
00:00:39	1	0.08%	90.97%	
00:00:40	1	0.08%	91.05%	
00:00:41	4	0.33%	91.38%	
00:00:42	1	0.08%	91,46%	
00:00:43	1	0.08%	91.54%	
	-			

Figure 7.1 – Job Queue Execution Times Report

The report can be customized using the following options:

Name: Job Queue Execution Ti	imes Number: JQE601 Page Orientation: Portrait								
Options Sort / Output Condition	ons Selection Advanced								
Job Options 🔇	Maximum Time Duration								
Job Type	Minutes								
✓									
	Seconds								

Figure 7.2 – Job Queue Execution Times Report, Report Interface

- Select the type of job to be included in the **Job Type** list.
- Set the **Maximum Time Duration** of the jobs to be included by entering the minutes and seconds of the longest job to be included.

JQE602 - JOBS BY HOUR

The Jobs by Hour report lists each hour of the day with the status of the jobs for that hour and how many jobs were processed at the time.

School	point Manes		Hope High School Jobs by Hour	Year: 2009-2010 Report: JQE602
Hour	State	Count		
12 AM	Complete	14		
1 AM	Complete	10		
2 AM	Complete	268		
3 AM	Complete	12		
4 AM	Complete	28		
5 AM	Complete	11		
6 AM	Complete	26		
7 AM	Complete	19		
8 AM	Complete	47		
9 AM	Complete	64		
10 AM	Complete	82		
11.AM	Complete	52		
0 PM	Complete	51		
1 PM	Complete	61		
2 PM	Complete	71		
3 PM	Complete	80		
4 PM	Complete	56		
5 PM	Complete	63		
6 PM	Complete	30		
7 PM	Complete	9		
8 PM	Complete	22		
9 PM	Complete	43		
10 PM	Complete	44		
11 PM	Complete	61		
	Total Jobs:	1224		
	min User at 10/10/2009 4:23		Edupoint School District	Page 1

Figure 7.3 – Jobs by Hour Report

The report can be customized using the following options:

Name: Job	s by Hour	Number: JQE602	Page Orientatio	on: Portrait					
Options	Sort / Outpu	ut Conditions	Selection	Advanced					
Job Optio	ns								
Job Type	State								
	*	*							
🗖 Show E	rrors								

Figure 7.4 – Jobs By Hour Report, Report Interface

- Select the type of job to be included in the **Job Type** list.
- Select the **State** of the jobs that are included in the report.
- To include jobs that were not completed because of errors in the totals for the report, check the **Show Errors** box.

JQE603 - JOBS BY TYPE

The Jobs by Type report lists all types of jobs, including each report, and a count of how many of each type of job has been processed.

Edupo Scheel Die	10	pe High School Jobs by Type	Year: 2009-2010 Report: JQE603
JobiD	Deso	Count	
ADN475	Average Daily Membership	2	
ADM601	Cumulative ADM/Absence Rate Report	nt 1	
ADM602	Student Count Report	1	
ADM675	Average Daily Membership Summary	1	
AD6201	Student Discipline Profile	3	
ADS401	Student Discipline Listing	2	
AD\$402	Student Demerit List	1	
ADS403	Discipline Disposition List	1	
ADS601	Discipline Summary by Grade	2	
AD\$602	Discipline Summary by Ethnic Code	1	
ADS801	Disciplinary Action Form	11	
ATD201	Daily Attendance Profile	5	
ATD202	Daily Attendance Minutes Profile	1	
ATD401	Daily Student Absence Totals	1	
ATD402	Daily Attendance List	3	
ATD403	Daily Absent List	17	
ATD405	Daily Perfect Attendance List	1	
ATD406	Daily Student List by Attendance	1	
ATD413	Class Reduction Summary	16	
ATD601	Daily Attendance Summary	2	
ATD 603	Monthly ADA Detail	10	
ATD604	Monthly ADA Summary	20	
ATD 605	Cumulative Enrollment Totals	1	
ATD606	Monthly School Enrolment Report	8	
ATD9D1	Attendance Sheet	17	
ATD902	Attendance Sheet	1	
ATD805	Attendance Letters	3	
ATP201	Period Student Attendance Profile	4	
ATP401	Period Attendance List	3	
ATP404	Period Class Attendance List	7	
ATP409	Period Absence Count	1	
ATP602	Period Sections Missing Attendance L		
ATP603	Positive Attendance Summary	5	
ATP604	Positive Attendance Audit	2	
ATP606	Positive Attendance Summary Extende		
ATP607	Positive Attendance Audit Extended	2	
ATP608	Supplemental Instruction Summary	5	
ATP609	Supplemental Instruction Detail	1	
ATP802	Attendance Auto Dialer Report	3	
ATT-SHT	Attendance Sheet Creation	1	
CH8202	Student Grad. Requirement Profile	14	
CH8402	Graduation Requirement List	3	
CH8404	Student Graduation Check	2	
Clear Results	Clear all scheduling results - leave pre alone		
CNF201	Student Conference Profile	4	

Figure 7.5 – Jobs By Type Report

The report can be customized using the following options:

Name: Jobs by Type Number: JQE603	Page Orientation: Portrait	
Options Sort / Output Conditions	Selection Advanced	
Job Options		۵
Јор Туре		
×		
C Show Errors		

Figure 7.6 – Jobs by Type Report, Report Interface

- Select the type of job to be included in the Job Type list.
- To include jobs that were not completed because of errors in the totals for the report, check the **Show Errors** box.

Chapter Eight: SECURITY

In this chapter, the following topics are covered:

- ► Where security for query-related screens may be defined
- ► Where security for report-related screens may be defined

Security for each of the screens discussed in this guide is defined by two options: the PAD Security screen and the Security Definition screen. Both are found under Synergy SIS > System > Security. How each works and how security is defined is covered in detail in the Synergy SIS - Security Administrator Guide. This chapter outlines where the security for query and reporting screens is defined in the Security Definition screen.

JOB QUEUE VIEWER SECURITY

Synergy SIS > System > Job Queue > Job Queue Viewer is controlled by the node below. This node also controls the Job Q Adm Viewer screen.

Revelation.JobQueueInfo.JobQueue

\mathbb{V}	Job	Queue View	er								
Job	Queu	e Contents for User: A	dm	in User							
Cu	rent										
Job	ID	Begin Date	E	nd Date	State		S	erver Name		Show Recurring	
			2		7		~			Filter	
De	elete Jo	bs State Selection		~							
Job	s in Q	ueue									Show Detail 🔕
X	Line	Date Submitted		Comp	leted	₿	State 🈂	Job ID		Description	🔶 Result
	1	05/01/2011 22:16:09		05/01/2011	22:16:17			ATP410		Summer Attendance Report	
	2	05/01/2011 22:05:51					STOP	ATP603		Positive Attendance Summary	
					Figure	Q	1 10	h Ouaua N	liow	or	

Figure 8.1 – Job Queue Viewer

The **Results** tab of the detail screen is controlled by the node below. This node also controls the **Results** tab of the **Job Q Adm Viewer** screen.

Revelation.JobQueueInfo.JobQueueResultGrid

♥Job Queue Viewer				«
Job Queue Contents for User: Test I	Jser			
Current				
	nd Date State	Server Name	Show Recurring	
		×	Filter	
Delete Jobs State Selection	▼			
Jobs in Queue			Hide Detail	0
Line Job ID				
End Term	Details Recurring Pattern	Results System Info		
2 MassAssignHouseTeam	User Name State	Priority		
	User, Test Complete 🛛 🔽	Normal 💌		
	Force Download Prompt			
	Job Result Files			۵
	Line Result Descripti	on		
		sign House and Team		
	2 extractFi	le		

Figure 8.2 – Job Queue Viewer, Detailed Screen, Results Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.JobQueueInfo.JobQueueUI •
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur •

JOB Q ADM VIEWER SECURITY

Synergy SIS > System > Job Queue > Job Q Adm Viewer is controlled by the node below. This node also controls the Job Queue Viewer screen.

Y.	Job	Q Adm	۷	iewer										
Cur	rent													
lob I	ID	Begin D	Date	e End Date	s S	tate Serv	er Name	S	how Rec	urring User Name 🔶	r			
De	elete Jo	bs State Se	lect	ion	*									
Job	s in Q)ueue										Sł	now Det	tail 🔇
×	Line	Submit Dt	₿	Completed 🔶	Total Time	Job ID 🔶	Priority (€	State 🌲	Description 🖨	Process Server Machine Name	⊜ Us Na	er Ime	Resu
	1	06/29/2011 13:02:04		06/29/2011 13:02:22	00:00:17	District Mass Sync Job ID	Normal	~		District Mass Synchronize Grade Book	QAWEB14	R	ob ilson	
	2	06/29/2011 12:58:40		06/29/2011 12:59:14	00:00:33	District Mass Sync Job ID	Normal	~		District Mass Synchronize Grade Book	QAWEB14		ob ilson	
		05/01/2011 22:16:09		05/01/2011 22:16:17	00:00:06	ATP410	Normal	~		Summer Attendance Report	SRV-TSCFILES		dmin ser	
		05/01/2011 22:05:51			N/A	ATP603	Normal	~	STOP	Positive Attendance Summary	SRV-TSCFILES		dmin ser	P
		05/01/2011 21:46:11		05/01/2011 21:46:19	00:00:07	STU409	Normal	~		Class Roster	SRV-TSCFILES		dmin ser	
	6	05/01/2011 21:41:52		05/01/2011 21:42:07	00:00:14	STU409	Normal	~		Class Roster	SRV-TSCFILES	A Us	dmin ser	
	Figure 8.3 – Job Q Adm Viewer													

Revelation.JobQueueInfo.JobQueue

The **Results** tab of the detail screen is controlled by the node below. This node also controls the **Results** tab of the **Job Queue Viewer** screen.

∀Job Q Adm Viewer	
Current	
Job ID Begin Date End D	Date State Server Name Show Recurring User Name 🔶
	Filter
Delete Jobs State Selection	v
Jobs in Queue	Hide Detail
Line Job ID	
1 Dashboard_13	Details Recurring Pattern Results System Info
2 Dashboard_16	User Name State Priority
3 End Term	User, Admin Complete 👻 Normal 👻
4 MassAssignHouseTeam	
5 Dashboard_13	Force Download Prompt
6 Dashboard_16	Job Result Files 🛛
7 Dashboard_16	Line Result Description
8 Dashboard_13	1 Student Schedule List
9STU415	

Revelation.JobQueueInfo.JobQueueResultGrid

Figure 8.4 – Job Q Adm Viewer, Detailed Screen, Results Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.JobQueueInfo.JobQueueUI
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur

QUERY SECURITY

The **Columns** tab of **Synergy SIS > Query > Query** is controlled by the security nodes:

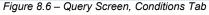
- **Revelation.Query.RevQuery** controls the main Query information such as Name, Group, and Type. This node also controls the **Type in Query** tab.
- Revelation.Query.BusinessObjectGrid controls the grid under Step 1.
- Revelation.Query.BusinessObjectProperty controls the grid under Step 2.
- Revelation.Query.AllPropertyGrid controls the grid under Step 3.

√Query													
Start Here! Enter the details about	your query:												
Name	Group		Туре		Output	Ту	ре	Orientatio	n	Туре			
40th Day Audits	Miscellaneous	*	Select	*	PDF		*	Landsca	oe 🔽	User			
Description 🕎 🛇 Audit Sercices	will use this list to the 40th day audits	verify s	/				▲ ▼						
Columns Conditions Sort Typ													
Step 1. Select the Business Objec	ts 🤇	0	bjects	Action	I 🔊			2. Select t	he Prop	erties			6
Line Name		-	Student					Name					уре
1 Staff (K12)			🗢 Studer	ntSOREnn	ollment			Abbreviate					ext
2 STAFFAdditionalJobClasses	· /		Section				2 Add Date Time Stamp				-	ATETIME	
3 StaffCourseQualification (K1)	· · · · ·		🤝 StaffSchoolYear				3 Add ID Stamp				ink Field		
4 StaffCredential (K12.StaffInfo	<i>'</i>		🗢 🗢 Staff			4 Address (3)					ext		
5 StaffDefaultSupportType (K1 6 StaffELLAuth (K12.StaffInfo)	2.stamnro)		6Address (AD) 6Address2 (Second line of Ma			e b douil à		ext ext					
7 StaffEmergency (K12.Emerge	anevinto)								`			-	ext
8 StaffRole (K12)	encynno)	-				7 Address2 (Second line of home) 8 AKAFirstName			/	Text			
9 StaffSchoolYear (K12)								AKALastN:					ext
								AKAMiddle					ext
Show All Business Objects									456	78	(»)		
Add Literal													
Step 3. Provide any desired prope	erty overrides												6
Line Name					Label	0v	erride	Order	Width	_	Group	Break	Display
Student Name (Student)								1					Default
2 Grade (StudentSOREnrollment)							2	0.5in				Default	
Enter Date (StudentSOREr	•							3					Default
4HomeroomSectionGU (Stu								4		V			Default
	Figure 8	8.5 -	- Que	ry Scri	een, C	Co	lumn	is Tab					

The **Conditions** tab of the **Query** screen is controlled by the security node:

Revelation.Query.ConditionTree

√Query						«			
Start Here! Enter the details about your query:									
Name	Group	Туре	Output Type	Orientation	Туре				
6th Grade Labels (2)	Miscellaneous	 Select 	V PDF	 Label 	Vser 🗸				
Description 🕎 🛇 Labels for 6th grade students going to Jr. High. Check the Hide 🛋 column for the information vou do NOT want to appear.									
Columns Conditions Sort Typ	be in Query Label	l Dimensions							
4. Condition Groups 🔇									
▼(AND)									
Grade ='06'									



The **Add Condition** screen, which opens when adding a condition to the **Conditions** tab, is controlled by the security node:

Revelation.Query.RevQueryCondition

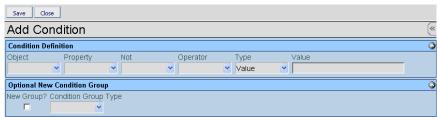


Figure 8.7 – Add Condition Screen

The Sort tab of the Query screen is controlled by the security node:

Revelation.Query.RevQuerySort

√Query						«			
Start Here! Enter the details about your query:									
Name	Group	Туре	Output Type	Orientation	Туре				
6th Grade Labels (2)	Miscellaneous	 Select 	PDF	 Label 	Vser Vser				
Description 🕎 🛇 Labels for 6th g column for the i	rade students go nformation vou do e in Query Label [ing to Jr. High. (NOT want to a Dimensions	Check the Hide opear.	•					
5. Define the sort output for the qu	iery					٨			
Line BOAndProperty Sort Order									
RoomName (R3.SchoolRoom)			Ascending					
2 FormattedName (R0.Student))			Ascending					

Figure 8.8 – Query Screen, Sort Tab

The **Type in Query** tab of the **Query** screen is controlled by the security node below. This node also controls the main Query definition fields such as Name, Group, and Type.

Revelation.Query.RevQuery

Start Here! Enter the details al						
		Tumo	Output Tur	a Orientation	Turne	
Name	Group	Туре	Output Typ			_
6th Grade Labels (2)	Miscellaneous	 Select 	PDF	Label	Vser User	
	ith grade students go he information vou do			▲ ▼		
Columns Conditions Sort	Type in Query Label	Dimensions				
Query						
K12.Student R0, K12.Enrol (SectionGU,R1.Homeroom K12.StaffSchoolYear R4 (S (StaffGU,R4.StaffGU,) COLS D0 ExemptedName	SectionGU,), K12.Se	etup.SchoolRoom 2.StaffSchoolYea er (,'ID:',,1,.2), R0	R3 (RoomGU, rGU,), K12.Sta	R2.RoomGU,), ff R5		

Figure 8.9 – Query Screen, Type In Query Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.Query.QueryRI
- Revelation.Query.ConditionGrid
- Revelation.Query.QueryExecute
- Revelation.Query.QueryUser

QUERY ADMIN SECURITY

The **Public Queries** tab of **Synergy SIS > Query > Query Admin** is controlled by the node:

ΨG	∖uery	/ Admin						(
Quen	/ Admin							
Publ	ic Queri	ies Nominated (Queries					
Filte	г Ргореі	rties						۵
Grou	p	Туре	Include Product Owned					
All P	ublic Q	ueries						٥
Line	Open	Name	Description	Туре	Output Type	User Name	Uwnea	Group
1	Open		Audit Services will use this list to verify information for the 40th day audits	Select	PDF	Weathers, Bob	No	Miscellaneous
2	Open	Varicella History/Vac	This report will list all 5th and 6th Grade students who have a history of Varicella, a vaccination date or an exemption listed. Can be changed to show other grade levels.	Select	PDF	Weathers, Bob	No	Health
3	Open		Labels for 6th grade students going to Jr. High. Check the Hide column for the information you do NOT want to appear.	Select	PDF	Wilson, Rob	No	Label
4	Open		Labels for 7th grade students by previous school. Hide columns you do not want to see.	Select	PDF	Wilson, Rob	No	Miscellaneous

Revelation.Query.QueryPublicGrid

Figure 8.10 – Query Screen, Public Queries Tab

The Nominated Queries tab of the Query Admin screen is controlled by the node:

Revelation.Query.QueryEvalGrid

\mathbb{V}^{C}	Query	Admin							«
Quer	y Admin								
Publ	ic Querie	s Nominate	ed Queries						
Filte	г Ргореі	rties							٥
Grou	Group Туре								
		~	Y Filter	,					
Nom	inations	;							۵
Line	Open	Nomination State	Name	Description	Туре	Output Type	Nominated By	Nomination Note	Query Group
1	Open	Nominated	Student Alpha w Teacher	Student Alpha w Teacher	Select	HTML	User, Admin		Scheduling - Current

Figure 8.11 – Query Admin, Nominated Queries Tab

The following security nodes do not provide a visible change in security on the screens:

- Revelation.Query.QueryOpenPublicGrid
- Revelation.Query.QueryPublic

JOB QUEUE REPORTS SECURITY

While report security options are available on the **Security Definition** screen, it is recommended to only use the PAD tree security to control access to reports.

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