

Synergy SIS[©] System Administrator Guide



Edupoint Educational Systems, LLC 1955 South Val Vista Road, Ste 210 Mesa, AZ 85204 Phone (877) 899-9111 Fax (800) 338-7646

Seventh Edition, April 2013

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

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

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

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

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

Synergy SIS is a trademark of Edupoint Educational Systems, LLC. * Other names and brands may be claimed as the property of others.

Copyright © 2006-2013, Edupoint Educational Systems, LLC. All rights reserved.

TABLE OF CONTENTS

CHAPTER ONE : OVERVIEW	9
Administration Documentation	
A Note About Navigation	14
Implementation Considerations	
Configuration Preparation	
Configuration Worksheets	
Initial Setup	
CHAPTER TWO : SYSTEM CONFIGURATION	29
Email	
Job Queue	
Multi-Level Administration	
User Options	
LDAP Authentication	
Page Definitions and Help System	
Address Mapping Options	
System Cache	
Pre-Installation Backup	
Schools Interoperability Framework (SIF)	
Central Printing Defaults	
Application Login Display Options	
List Options	
Advanced	
CHAPTER THREE : DISTRICT AND SCHOOL SETUP	
District Setup	
Organization	
School Setup	
Copy School Setup Non-District Schools	
CHAPTER FOUR : STAFF AND USERS	97
Staff Setup	
Adding New Staff	
Combining and Cleaning Staff Records	
Assigning Existing Staff to Schools	
Editing Staff Data	
Overview of Users Setup	
Adding User Groups	
Members Tab	
Organizations Tab	140

Navigation Menu Tab	
Options Tab	
Security Settings Tab	
POV Tab	
Editing User Groups	
Adding Users	
Demographics Tab.	
Organizations Tab User Groups Tab	
Navigation Menu Tab	
Security Settings Tab	
Focus Tab	
Spell Check Tab	
POV Tab	
Editing Users	
CHAPTER FIVE : ANNOUNCEMENTS AND ONLINE HELP	165
Announcements	166
Online Help	
Installing Help	
Configuring Help	
Support Page	
Contact Us Link	
Login Page	
	4 7 7
CHAPTER SIX : SCANNING	177
Overview of Scanning	
Overview of Scanning Installing the Scanning Software	178 179
Overview of Scanning Installing the Scanning Software Scanning the Sheets	178 179 182
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets	178 179 182 186
Overview of Scanning. Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS	178 179 182 186 189
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields	178 179 182 186 189 19 1
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens	178 179 182 186 189 191 200
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations	178 179 182 186 189 191 200 214
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties)	178 179 182 186 189 191 200 214 215
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface	178 179 182 186 189 191 200 214 215 216
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events	178 179 182 186 189 191 200 214 216 219
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules	178 179 182 186 189 191 210 214 215 216 219 223
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules Creating Rule Processing Groups	178 179 182 186 189 191 200 214 215 216 219 223 229
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules Creating Rule Processing Groups Customizing Messages	
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules Creating Rule Processing Groups Customizing Messages Auto Populate	
Overview of Scanning Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules Creating Rule Processing Groups Customizing Messages	
Overview of Scanning. Installing the Scanning Software Scanning the Sheets Managing the Scan Sheets CHAPTER SEVEN : CUSTOMIZING SCREENS Adding Custom Fields Changing Screens Customizing Quick Launch Abbreviations Modifying Existing Fields (Properties) Changing A Report Interface Defining Screen Events Creating Custom Rules Creating Custom Rules Creating Rule Processing Groups Customizing Messages Auto Populate CHAPTER EIGHT : EMAIL CONFIGURATION General Email Configuration	178 179 182 186 189 191 .200 214 .215 .216 219 .223 .229 .230 .231 233 234
Overview of Scanning. Installing the Scanning Software	

Email Variables	
CHAPTER NINE : OTHER SETUP	245
Frequency Unit	
Label Detail	
Lookup Table Definition	
Mail Merge Definition and Mail Merge District Definition	
Page Size Detail	
SIF (Schools Interoperability Framework)	
Task Definition	
Translation	
Updates	
CHAPTER TEN : RT PROCESS SERVER AND DB TOOLS	279
RT Process Server	
DB Tools	
Troubleshooting Hints	
Recommended Backup Strategies for Oracle	
CHAPTER ELEVEN : REPORTS	303
TCH401 – Staff Directory	
PRF601 – User Performance Statistics	
REV401 – User Group User List	
REV402 – User List	
CHAPTER TWELVE : SECURITY	311
Staff Security	
Announcement Tree Security	
Report Interface Change Security	
User Defined Data Security	
View Change Security	
School Setup Copy Security	
Attendance Scan Sheet Backup Security	
Grading Scan Sheet Backup Security	
Auto Populate Security	
District Setup Security	
Email Content Security	
Frequency Unit Security	
Label Detail Security	
Lookup Table Definition Security	
Mail Merge Definition Security	
Mail Merge District Definition Security	
Organization Security	
Page Size Detail Security	
Property Override Security	
Revelation Message Security	

Rule Group Security	328
Rules Setup Security	
School Setup Security	
System Configuration Security	
Task Definition Security	333
SIF Transaction History Security	334
User Security	335
User Groups Security	338
System Reports Security	341

ABOUT THIS GUIDE

Document History

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

CONVENTIONS USED IN THIS GUIDE

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

 Time 0
 Time 0

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

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



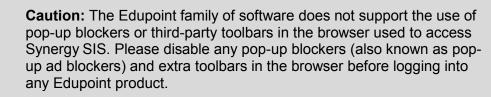
Reference – Refers to another source of information, such as another manual or website

CAUTION

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

BEFORE YOU BEGIN

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



Chapter One: OVERVIEW

This chapter covers:

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

ADMINISTRATION DOCUMENTATION

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

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

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

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

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

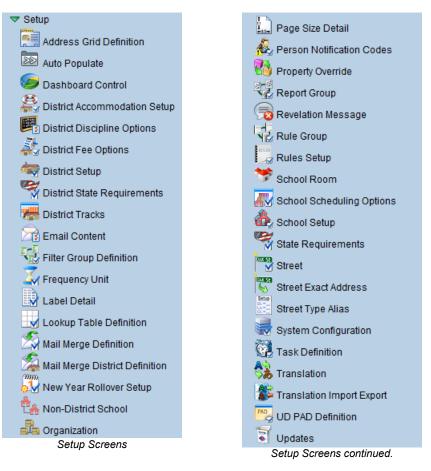
For most modules, there is a user guide that explains data viewing and entry. Districts use these guides to train end users such as teachers and office staff.

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

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

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

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



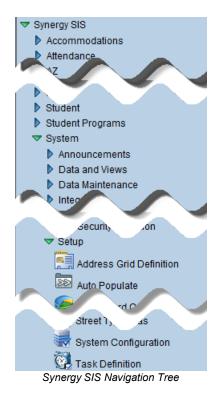
- Address Grid Definition the Student Information Administrator Guide
- Auto Populate Chapter Seven of this guide
- Dashboard Control the Dashboard Guide
- District Accommodation Setup the Synergy SE System Administrator Guide
- District Discipline Options the Discipline & Conference Administrator Guide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

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

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

A Note About Navigation

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



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



IMPLEMENTATION CONSIDERATIONS

A district must consider many things when implementing Synergy SIS.

How to transition to Synergy SIS?

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

How to convert the data?

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

How to set up Synergy SIS?

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

Will Synergy SIS be integrated with an LDAP system?

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

Will Synergy SIS be used to send email?

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

Who does what?

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

How will training occur?

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

When to go "live"?

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

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

CONFIGURATION PREPARATION

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

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

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

CONFIGURATION WORKSHEETS

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

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

Empiland Job Outro				
Email and Job Queue C	ptions			
Email Enabled (Y/N)				
SMTP Email Server IP A				
Default Email From Addr	ess			
SMTP Port Override				
Enable SMTP Authentica	ation (Y/N)			
Job Queue				
Enable (Y/N)				
Multi-Level Administrat	tion			
Enable (Y/N)				
Messaging				
Bulk Mail Enable (Y/N)				
Time to begin bulk email	ing			
Keep History of Bulk Ema		Y/N)		
Contact Type for Email H		/		
Immediate Email Enable				
Immediate Start Time	()			
Interval in hours				
Keep History of Immedia	te Emails to Each Pe	rson		
(Y/N)				
Blind Copy Sender on Im	mediate Emails (Y/N)		
Default Point of View H		/		
View Name	omor ugo			
Tracking				
Track User Login Attemp	ts			
Password Security Opt				
Minimum password lengt				
Number of days before p				
Require both alpha and numeric characters to exist in				
the password (Y/N)				
Force uniqueness of passwords up to X passwords				
Force uniqueness of passwords up to X passwords				
days				
	ttemnts hefore user i	haldesib s		
Number of invalid login attempts before user is disabled Default Entry Access Times Access Time Period				
Day of Week	Enabled (Y/N)	Begin		End
Monday		Deyin		
Tuesday				
Wednesday				
Thursday				
Friday	1			

System Configuration Screen – Security Tab

Saturday			
Sunday			
Pass Through Authenti			
Allow pass through authe	entication for logins (Y/N)	
LDAP Integration			
Using LDAP (Y/N)			
LDAP Server Type			
Integration Type			
Domain Name			
Server Path			
Secured via SSL (Y/N)			
User Property			
Role Property			
Staff Types to allow LDA	P to add staff school	year	
entries			
User Groups to Admini	ster Options		
Hide users who belong to			
allowed to administer even if they belong to a user			
group that a user is allow	ed to administer (Y/	۷)	
Data Entry Options			
Namespaces to retain vie		n another	
user has changed the sa	me data		

System Configuration Screen – Options Tab

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

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

Organization

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

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

District Setup Screen – Options Tab

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

District Setup Screen – System Tab

New Student Add Type Permanent ID Update Type Permanent ID Update Type Permanent ID Update Type Allow "No Show" Require Summer Withdrawal Code/Date for "No Show" Do Not Clear Summer Withdrawal Code and Date Show SASIXP Enrollment History Validate SASIxp Enrollment History Show User Code As Lookup Show Viser Code On Inactive Student Delete Course Request on No Show of Student Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Simple Delete of Enrollment Disable New Year Def used when adding new students Errollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default LLE Lixt Code Default LLE Lixt Code Default QATE Reaton Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one Race To Be Selected Even If Hispanic Show Noutry as Lookup Show County as Lookup Show Co	Enrollment Options		
Permanent ID Update Type Allow "No Show" Allow "No Show" Allow "No Show" On Not Clear Summer Withdrawal Code And Date Show SASIXP Enrollment History Validate SASIxp Enrollment History Show Emergency Contact as Lookup Show User Num As Lookup Show Vast Code As Lookup Show Vast Code As Lookup Show Vast Code As Lookup Show Vast Requises on No Show of Student Require Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Message on Elementary School Types Disable New Year Activation Suppress Needs Transactions Suppress Needs Transactions Suppress Needs Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one Race To Be Selected Even If Hispanic Show Non-District School Lookup As A Find View Require Errolling Parents Require Errolling Parent Validations Disable Add, Drop, and Transfer Disable Adding New State Require Errolling Parent Validations Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Parel Message Parel Validations Disable Add, Drop, And Transfer Disable Add, Drop,			
Allow "No Show"			
Require Summer Withdrawal Code/Date for "No Show"			
Do Not Clear Summer Withdrawal Code and Date Show SASIXP Enrollment History Vaildate SASIxp Enrollment History Show User Code As Lookup Show User Code As Lookup Show User Code As Lookup Show User Num As Lookup Show User Num As Lookup Show User Code As Lookup Show Advanced Options On Inactive Student Delete Course Request on No Show and Inactivate Delete Course Request on No Show and Inactivate Delete Course Request on No Show and Inactivate Delete Show Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default SPED Exit Code Default SPED Exit Code Default SPED Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportatio			
Show SASIXP Enrollment History Validate SASixp Enrollment History Show Emergency Contact as Lookup Show User Code As Lookup Show User Num As Lookup Show And Inactive Student Delete Course Request on No Show and Inactivate Delete Course Request on No Show of Student Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Allow Simple Delete of Enrollment Allow Simple Delete of Enrollment Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default BED Exit Code Default Set Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Show Ounty as Lookup Show Ounty as Lookup Show Nistict Of Residence as Lookup Show Notistict Of Residence as Lookup Show Notistict Of Residence as Lookup Show Notistict Of Residence as Lookup Show Notistict Of Residence as Lookup Show Ounty as Lookup </td <td></td> <td></td> <td></td>			
Validate SASIxp Enrollment History Show Emergency Contact as Lookup Show User Code As Lookup			
Show Emergency Contact as Lookup Show User Code As Lookup Show User Num As Lookup Show Advanced Options On Inactive Student Delete Course Request on No Show and Inactivate Delete New Year Enrollment on No Show of Student Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Withdrawal Reason Text Show Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Rear Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default BLE Exit Code Default BLE Exit Code Default BT Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic <			
Show User Code As Lookup			
Show User Num As Lookup Show Advanced Options On Inactive Student Delete Course Request on No Show and Inactivate Delete New Year Enrollment on No Show of Student Require Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Message on Elementary School Types Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Errollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default SPED Exit Code Default SPED Exit Code Default SPED Exit Code Default SPED Exit Code Default SPED Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one race to be selected even if Hispanic Force one race to be selected even if Hispanic Show Non-District School Lookup As A Find View Require Find Before Adding New Prents Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disabl			
Show Advanced Options On Inactive Student			
Delete Course Request on No Show and Inactivate Delete New Year Enrollment on No Show of Student Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Message on Elementary School Types Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default SPED Exit Code Default FLL Exit Code Default For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Show Non-District School Lookup As A Find View Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Add, Drop, And Transfer Disabled Days Disabled Time Period			
Delete New Year Enrollment on No Show of Student Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Withdrawal Reason Text Message on Elementary School Types Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default BCF Exit Code Default ELL Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Show County as Lookup Show Non-District School Lookup As A Find View Require Find Before Adding New Parents Disable Add, Drop, and Transfer Disable Add, Drop, And Transfer Disabled			
Keep Concurrent Enrollment On Inactive Student Require Withdrawal Reason Code Show Withdrawal Reason Code Show Withdrawal Reason Text Message on Elementary School Types Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one Race To Be Selected Even If Hispanic Show County as Lookup Show Non-District School Lookup As A Find View Require Find Before Adding New Parents Disable Add, Drop, and Transfer Disable Add, Drop, And Transfer Disable Add, Drop, And Transfer Disable Add, Drop,			
Require Withdrawal Reason Code			
Show Withdrawal Reason Code			
Show Withdrawal Reason Text Message on Elementary School Types Withdrawal Reason Text Hithdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Emoliment Date Validation Auto-Generate Needs Transactions Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default Needs Exit Code Default SPED Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force One Race To Be Selected Even If Hispanic Show Non-District Of Residence as Lookup Show Non-District School Lookup As A Find View Require Find Before Adding New Parents Require Find Before Adding New Parents Disabled Ad, Drop, and Transfer Disable Add, Drop, And Transfer Disabled Time Period Day of Week Begin End Monday Image: Addition Amongene	•		
Elementary School Types			
Withdrawal Reason Text Allow Simple Delete of Enrollment Disable New Year Activation			
Allow Simple Delete of Enrollment			
Disable New Year ActivationImage: state of the state of th			
Show Residence Properties on Student View New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default Needs Exit Code Default SPED Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one race to be selected even if Hispanic Show County as Lookup Show Non-District School Lookup As A Find View Require Find Before Adding New Parents Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disabled Add, Drop, And Transfer Disabled Days Disabled Time Period Day of Week Begin Monday Image: Comparison of the select of			
New Year Def used when adding new students Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default ELL Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Show District Of Residence as Lookup Show Non-District School Lookup As A Find View Require Find Before Adding New Parents Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Ability to Add, Drop, And Transfer Disable Ability to Add, Drop, And Transfer Disable Adag Monday Tuesday Wednesday Thursday			
Enrollment Date Validation Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default Needs Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one race to be selected even if Hispanic Show District Of Residence as Lookup Show Non-District School Lookup As A Find View Require End Before Adding New Parents Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Ability to Add, Drop, And Transfer Disable Ability to Add, Drop, And Transfer Disabled Days Medek Begin End Monday Tuesday Hermite Selected Interpreted Selected Interpret			
Exit Programs/Services On Student Inactivation Auto-Generate Needs Transactions Suppress Needs With Expired Programs Default Needs Exit Code Default SPED Exit Code Default SPED Exit Code Default GATE Exit Reason Use Grid For Transportation Requirements Force One Race To Be Selected Even If Hispanic Force one race to be selected even if Hispanic Show District Of Residence as Lookup Show County as Lookup Show Non-District School Lookup As A Find View Require Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Add, Drop, And Transfer Disabled Days Disabled Time Period Day of Week Begin Monday Image: Comparent Compare	,		
Auto-Generate Needs Transactions Image: Second			
Suppress Needs With Expired ProgramsDefault Needs Exit CodeDefault ELL Exit CodeDefault SPED Exit CodeDefault GATE Exit ReasonUse Grid For Transportation RequirementsForce One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Add, Drop, And TransferDisabled DaysDisabled DaysMondayTuesdayWednesdayThursdayFridaySaturday			
Default Needs Exit Code			
Default ELL Exit CodeDefault SPED Exit CodeDefault GATE Exit ReasonUse Grid For Transportation RequirementsForce One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Add, Drop, And TransferDisabled DaysDisabled DaysMondayTuesdayWednesdayThursdayFridaySaturday	· _ •		
Default SPED Exit CodeDefault GATE Exit ReasonUse Grid For Transportation RequirementsForce One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Add, Drop, And TransferDisabled DaysDisabled DaysMondayTuesdayWednesdayThursdayFridaySaturday			
Default GATE Exit ReasonUse Grid For Transportation RequirementsForce One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled DaysDisabled DaysDisabled SeginMondayTuesdayWednesdayThursdayFridaySaturday			
Use Grid For Transportation RequirementsImage: Selected Even If HispanicForce One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsImage: Selected Even If HispanicRequire Enrolling Parent ValidationsImage: Selected Even If HispanicDisable Add, Drop, and TransferImage: Selected Even If HispanicDisabled Add, Drop, and TransferImage: Selected Even If HispanicDisabled DaysDisabled Time PeriodDay of WeekBeginEndMondayImage: Selected Even If HispanicTuesdayImage: Selected Even If HispanicWednesdayImage: Selected Even If HispanicFridayImage: Selected Even If HispanicSaturdayImage: Selected Even If Hispanic			
Force One Race To Be Selected Even If HispanicForce one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Ability to Add, Drop, And TransferDisabled DaysDisabled DaysDisabled Time PeriodMondayTuesdayWednesdayThursdayFridaySaturdayInterpretation of the selected event of			
Force one race to be selected even if HispanicShow District Of Residence as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent Validations Disable Add, Drop, and Transfer Disable Ability to Add, Drop, And TransferDisabled DaysDisabled DaysDisabled DaysMondayTuesdayWednesdayThursdayFridaySaturdaySaturday			
Show District Of Residence as LookupImage: Show County as LookupShow County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsImage: Show Non-District School Lookup As A Find ViewRequire Enrolling Parent ValidationsImage: Show Non-District School Lookup As A Find ViewDisable Add, Drop, and TransferImage: Show Non-District School Lookup And TransferDisable Ability to Add, Drop, And TransferImage: Disabled Time PeriodDay of WeekBeginEndMondayImage: Show Non-District School Lookup As A Find ViewTuesdayImage: Show Non-District School Lookup As A Find ViewWednesdayImage: Show Non-District School Lookup As A Find ViewThursdayImage: Show Non-District School Lookup As A Find ViewFridayImage: Show Non-District School Lookup As A Find ViewSaturdayImage: Show Non-District School Lookup As A Find ViewShow Non-District School Lookup As A Find ViewImage: Show Non-District School Lookup As A Find ViewSaturdayImage: Show Non-District School Lookup As A Find ViewImage: Show Non-District School Lookup As A Find View			
Show County as LookupShow Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled Time PeriodDay of WeekBeginEndMondayTuesdayWednesdayThursdayFridaySaturdaySaturday			
Show Non-District School Lookup As A Find ViewRequire Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled DaysDisabled Time PeriodDay of WeekBeginMondayTuesdayWednesdayThursdayFridaySaturdaySaturday			
Require Find Before Adding New ParentsRequire Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled DaysDisabled Time PeriodDay of WeekBeginMondayEndTuesdayIWednesdayIThursdayIFridayISaturdayIIIDisabled DaysIIIDisabled DaysIDay of WeekIBeginII			
Require Enrolling Parent ValidationsDisable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled DaysDisabled Time PeriodDay of WeekBeginEndMondayImage: Colspan="2">Image: Colspan="2" Image: Colspan=			
Disable Add, Drop, and TransferDisable Ability to Add, Drop, And TransferDisabled Time PeriodDisabled DaysDisabled Time PeriodDay of WeekBeginEndMondayImage: State of the s			
Disable Ability to Add, Drop, And TransferDisabled Time PeriodDisabled DaysDisabled Time PeriodDay of WeekBeginEndMondayImage: Comparison of the periodTuesdayImage: Comparison of the periodWednesdayImage: Comparison of the periodThursdayImage: Comparison of the periodFridayImage: Comparison of the periodSaturdayImage: Comparison of the period		1	
Disabled DaysDisabled Time PeriodDay of WeekBeginEndMondayTuesdayWednesdayThursdayFridaySaturday			
Day of WeekBeginEndMondayTuesdayWednesdayThursdayFridaySaturday		Disabled Tir	ne Period
MondayImage: Constraint of the second se			
TuesdayImage: Constraint of the second s		Ŭ Ŭ	
WednesdayImage: Constraint of the second			
Thursday	•		
Friday			
Saturday			
	*		

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

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

District Setup Screen – Grade Setup Tab

Graduation Grade				
Grade	Next Grade	Years Until Gra	aduation	ADA Group

District Setup Screen – TeacherVUE Tab

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

District Setup Screen – Labels Tab

Grading Labels	
Default Grading Label	

District Setup Screen – Reports Tab

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

District Setup Screen – Mobile Apps Tab

Disable Mobile Apps	
AdminVUE App	
ParentVUE App	
StudentVUE App	
TeacherVUE App	

School Setup Screen – Basic Info Tab

Period De	efinition			
Start Perio	bc			
End Perio	d			
Homeroor	m Period			
Homeroor	n Meeting Day			
Type Info	ormation			
School Ty				
	tendance Type			
School At	tendance Taken			
	tendance Reason Typ	e		
Concurren	nt Enrollment Type			
ALC Scho	ol Type			
School Ca	ategory			
Calendar				
Grade Se	lection (list grades ch	necked)		
Grading				
Grading F				
Rollover				
Enter Coc				
Enter Date	-			
Term Def				
Term #	Term Name	Begin Date	End Date	Current Term Codes
Track Se	lection (list tracks ch	lecked)		
Policy Co				
	olicy Codes			
Other Inf				
	om State Reporting			
	Student Classes			
	ent Status			
	Teacher Aide Course			
Course ID				
Course Ti				
Credit Giv	ren			

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

School Setup Screen – SIS Data Options Tab

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

School Setup Screen – Labels Tab

Grading Labels	
Default Grading Label	

School Setup Screen – TeacherVUE Tab

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

Staff Screen – Required Information

Last Name	First Name	Туре	Gender	Role

User Screen – Default Information for Demographics Tab

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

User List

Last Name	First Name	Login Name	Email	User Groups

INITIAL SETUP

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

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



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

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

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

Chapter Two: SYSTEM CONFIGURATION

This chapter covers:

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

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

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

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

System Confi					b Queue	Multi-Level
System Configuration	1					Administration
Security Options Adv	anced					
Email Options				Job Queue	Multi-Level A	dministration
Email Enabled Test Er				Enable V	Enable	
	Default Email F		;			
titan.xnova.com SMTP Port Override - def	rwilson@edupoir	it.com				
Swite Foil Overnue - dei	ault is 20			ו ר		
Enable SMTP Authenti	ication		Email			
	SMTP Password	d		-		
Messaging]][<u></u>
Bulk Mail Enable		m II	mmediate Email Enable			
Time to begin bulk emailir	ng	Imm	ediate Start Time	terval in hours (1 to 24) to check for ema	ails to send
Keep History of Bulk E		erson 🔽 🖡	Keep History of Immedia	te Emails to Each Pers	on	
Contact Type for Email Hi	story	V E	Blind Copy Sender on In	nmediate Emails		
Letter	∼ D					
Default Point Of View Hor View Name	-		Tracking	empts		User Options
Home Screen	Change POV H	lome Page		cinpto		
Password Security Option		antoro (L	us block for an limit. "			
Minimum password length			ve blank for no limitatior			
Number of days before pa	assword expires	(Leave blank for no expi	ration)		
Require both alpha and n	numeric charact	ers to exist ir	n the password	~		
Force uniqueness of pass	swords up to	histori	ical passwords. (Leave I	blank for no uniquene	ss check)	
Force uniqueness of pas			ber of days. (Leave blan			
NOTE: To enable	a disabled use	r account go	led 5 (Leave bl to the User view and cl	ank for unlimited atten lear the disabled check	npts) kbox.	nd LDAP Monite
NOTE: To enable Process Server / LDAP M	e a disabled use onitor Connecti	r account go	led 5 (Leave bl to the User view and cl	lank for unlimited atten	npts) kbox. Process Server a	nd LDAP Monife
NOTE: To enable Process Server / LDAP M	e a disabled use	r account go on password	led 5 (Leave bl to the User view and cl	ank for unlimited atten lear the disabled check	npts) kbox. Process Server a	
Process Server / LDAP M	e a disabled use	r account go on password bled	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week Monday Tuesday	e a disabled use onitor Connecti es Ena Yes Yes	r account go on password bled s	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday	e a disabled use onitor Connecti es Ena Yes Yes	r account go on password bled 5 5 5	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes	r account go on password bled 5 5 5 5 5	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes	r account go on password bled 5 5 5 5 5 5 5 5	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday	es disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes	r account go on password bled E E E E E E E E E E E E E E E E E E E	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	LDAP
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday	es disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes Yes	r account go on password bled E E E E E E E E E E E E E E E E E E E	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica	e a disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	LDAP
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through auth	e a disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v	ed 5 (Leave b) to the User view and ci I (Used to require passw	lank for unlimited atten lear the disabled check vord authentication for Access Time Perf	npts) kbox. Process Server a	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v s v c s v c s v c s v c s v c s v c s v c c s v c c c c c c c c c c c c c c c c c c c	ed 5 (Leave b) to the User view and ci I (Used to require passw	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End	npts) kbox. Process Server an od	LDAP
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through aut LDAP Integration	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled F s v s s v s s v s s v s s v s s v s s v s s s s	ed 5 (Leave bl o to the User view and cl I (Used to require passw Begin	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End	npts) kbox. Process Server an od	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 2 Allow pass through aut LDAP Integration Using LDAP LDAP Server	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled F s v s s v s s v s s v s s v s s v s s v s s s s	led 5 (Leave bl o to the User view and cl I (Used to require passw Begin Type - Higher levels inc	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Lude the functionality of r Groups	npts) kbox. Process Server and od od of the prior level	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 2 Allow pass through aut LDAP Integration Using LDAP LDAP Server	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled F s v s s v s s v s s v s s v s s v s s v s s s s	ed 5 (Leave bl o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Lude the functionality of r Groups	npts) kbox. Process Server and od od of the prior level v	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Vednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through aut LDAP Integration Using LDAP LDAP Server Domain Name xnovahq You must enter in an L	e a disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v s v s	ied 5 (Leave bid) to the User view and cl 1 (Used to require passwith) Begin 3 3 Begin 3 3 Comparison 1 1 Used to require passwith) 1 1 Begin 3 3 Begin 3 1 Lipher/Jack 1 1 <t< td=""><td>ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Inde the functionality of er Groups P://myserver.com) P user's and RT staff</td><td>npts) kbox. Process Server and od od of the prior level Secured Execured This user prope</td><td>LDAP Authentication</td></t<>	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Inde the functionality of er Groups P://myserver.com) P user's and RT staff	npts) kbox. Process Server and od od of the prior level Secured Execured This user prope	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Vednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through aut LDAP Integration Using LDAP LDAP Server C Domain Name xnovahq You must enter in an L	e a disabled use onitor Connecti es Ena Yee Yee Yee Yee Yee Yee Ton Type DAP user prop e LDAP user prop	r account go on password bled s v s v s v s v s v s v s v s v s v s	ied 5 (Leave bid) to the User view and cl 1 (Used to require passwith) Begin 3 3 Begin 3 3 Comparison 1 1 Used to require passwith) 1 1 Begin 3 3 Begin 3 1 Lipher/Jack 1 1 <t< td=""><td>ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Inde the functionality of er Groups P://myserver.com) P user's and RT staff</td><td>npts) kbox. Process Server and od od of the prior level Secured Execured This user prope</td><td>LDAP Authentication</td></t<>	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Inde the functionality of er Groups P://myserver.com) P user's and RT staff	npts) kbox. Process Server and od od of the prior level Secured Execured This user prope	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through aut LDAP Integration Jsing LDAP LDAP Server Domain Name xnovahq You must enter in an L any named single value Staff Badge Number pr	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v s v s	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.nova.com sure matching of LDAF J, description, info, et	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Unde the functionality of er Groups P.//myserver.com) P user's and RT staff c.). The property val	npts) kbox. Process Server and od od of the prior level Secured Execured This user prope	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server © Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v s v s	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.nova.com sure matching of LDAF J, description, info, et	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Unde the functionality of er Groups P.//myserver.com) P user's and RT staff c.). The property val	npts) kbox. Process Server and od od of the prior level Secured Execured This user prope	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server © Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert	e a disabled use onitor Connecti es Ena Yes Yes Yes Yes Yes Yes Yes Yes Yes Yes	r account go on password bled s v s v s v s v s v s v s v s v s v s	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.nova.com sure matching of LDAF J, description, info, et	ank for unlimited atten lear the disabled check vord authentication for Access Time Peri End Unde the functionality of er Groups P.//myserver.com) P user's and RT staff c.). The property val	npts) kbox. Process Server and od od of the prior level Secured Execured This user prope	LDAP Authentication
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Vednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica 7 Allow pass through aut LDAP Integration Using LDAP LDAP Server Domain Name xnovahq You must enter in an L any named single valus taff Badge Number pr WARNING: This property In order to provide the	e a disabled use onitor Connecti es Final Yes Yes Yes Yes Yes Yes Yes Yes Yes DAP user prop e LDAP user prop e LDAP user property. ty must be blai	r account go on password bled a v a v bled a v bled a v bled a v bled a v bled a v bled a v bled bled a v bled b	ed 5 (Leave bi to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.xnova.com ure matching of LDAF description, info, et udents if Students ex	ank for unlimited atten lear the disabled check vord authentication for Access Time Pert End End Indexter State Primyserver.com Primyserver.com Primyserver.com Prises and RT staff c.). The property val itst in your LDAP.	npts) kbox. Process Server and od od of the prior level Secured . This user property repres	Via SSL gainst the
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server © Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This property In order to provide the Type must be specifica	e a disabled use onitor Connecti es Ena Yee Yee Yee Yee Yee Yee Yee Construction for Type DAP user property. DAP user property.	r account go on password bled s v s v s v s v s v s v s v s v s v s v	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://a23.xnova.com sure matching of LDAF j, description, info, et udents if Students ex	ank for unlimited atten lear the disabled check vord authentication for End Indextee String Period Indextee String Period Indextee String Period Indextee String Period Indextee String Period Period Period Period Period Period Period Period Period Period Period Period Period Period Period Period Period Period	npts) kbox. Process Server and od od of the prior level Secured . This user property repres	Via SSL gainst the
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server © Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This property In order to provide the Type must be specifica	e a disabled use onitor Connecti- es Ena Yee Yee Yee Yee Yee Yee Yee Yee Yee DAP user proper LDAP user property. Type DAP user property. ty must be blat e ability to autoc	r account go on password bled s v f	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.xnova.com ure matching of LDAF g. description, info, et udents if Students ex ff and staff school year o add staff school year	ank for unlimited atten ear the disabled check vord authentication for Access Time Peri End End Udde the functionality of er Groups P://myserver.com) P user's and RT staff (Lookup K12.STAFF_ entries, the LDAP.	npts) kbox. Process Server and od od of the prior level v Secured . This user property ue is matched and property repres TYPE).	Via SSL gainst the
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through Authentica UDAP Integration Using LDAP LDAP Server © Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert User Property In order to provide the Type must be specified Role Property	e a disabled use onitor Connecti- es Ena Yes Yes Yes Yes Yes Yes Yes Yes DAP user prope t LDAP user property. Type DAP user property. ty must be blau e ability to autoc J. The expecte Staff Types to a Counselor I	r account go on password bled s v f	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://a23.xnova.com sure matching of LDAF j, description, info, et udents if Students ex	ank for unlimited atten ear the disabled check vord authentication for Access Time Peri End End Udde the functionality of er Groups P://myserver.com) P user's and RT staff (Lookup K12.STAFF_ entries, the LDAP.	npts) kbox. Process Server and od od of the prior level v Secured . This user property ue is matched and property repres TYPE).	Via SSL gainst the
NOTE: To enable Process Server / LDAP M Default Entry Access Time Imp Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert User Property User Groups to Administe	e a disabled use onitor Connecti- es Ena Yee Yee Yee Yee Yee Yee Yee Yee Yee Ye	r account go on password bled F a V F C a V F a V F C a V F a V F a V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F a V F a V F C A V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F C A V F C A V F C A	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.xnova.com ure matching of LDAF g. description, info, et udents if Students ex ff and staff school year Maintenance Princip	ank for unlimited atten ear the disabled check vord authentication for Access Time Peri End End Udde the functionality of r Groups P //myserver.com) P user's and RT staff (c.). The property val itist in your LDAP. ar entries, the LDAP (lookup K12.STAFF_ entries	npts) kbox. Process Server and od od of the prior level vertice Secured Secured This user property represe TYPE). acher	Via SSL prty can be gainst the enting Staff
NOTE: To enable Process Server / LDAP M Default Entry Access Time Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through Authentica UDAP Integration Using LDAP LDAP Server Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert User Property User Groups to Administe Childe users who belong	e a disabled use onitor Connecti- es Ena Yee Yee Yee Yee Yee Yee Yee Yee Yee Ye	r account go on password bled F a V F C a V F a V F C a V F a V F a V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F a V F a V F C A V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F C A V F C A V F C A	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.xnova.com ure matching of LDAF g. description, info, et udents if Students ex ff and staff school year Maintenance Princip	ank for unlimited atten ear the disabled check vord authentication for Access Time Peri End End Udde the functionality of r Groups P //myserver.com) P user's and RT staff (c.). The property val itist in your LDAP. ar entries, the LDAP (lookup K12.STAFF_ entries	npts) kbox. Process Server and od od of the prior level vertice Secured Secured This user property represe TYPE). acher	Via SSL via SSL via SSL prty can be gainst the enting Staff hat a user is all
NOTE: To enable Process Server / LDAP M Default Entry Access Time Imp Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentica © Allow pass through aut LDAP Integration Using LDAP LDAP Server Domain Name xnovahq You must enter in an L any named single valuu Staff Badge Number pr WARNING: This propert User Property User Groups to Administe	e a disabled use onitor Connecti- es Ena Yee Yee Yee Yee Yee Yee Yee Yee Yee Ye	r account go on password bled F a V F C a V F a V F C a V F a V F a V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F a V F a V F C A V F a V F C A V F a V F a V F C A V F a V F C A V F C A V F C A V F C A V F C A	ed 5 (Leave bi o to the User view and cl I (Used to require passw Begin Type - Higher levels inc sers and Synchronize Use Server Path (e.g. LDAF LDAP://az3.xnova.com ure matching of LDAF g. description, info, et udents if Students ex ff and staff school year Maintenance Princip	ank for unlimited atten ear the disabled check vord authentication for Access Time Peri End End Udde the functionality of r Groups P //myserver.com) P user's and RT staff (c.). The property val itist in your LDAP. ar entries, the LDAP (lookup K12.STAFF_ entries	npts) kbox. Process Server and od od of the prior level vertice Secured Secured This user property represe TYPE). acher	Via SSL prty can be gainst the enting Staff

System Configuration screen, Security tab

EMAIL

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



JOB QUEUE

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



MULTI-LEVEL ADMINISTRATION

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



USER OPTIONS

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

efault Point Of View Home Page		Tanala Unana Lania Attananta
Chan	ge POV Home Page	Track User Login Attempts
Home Screen		
Password Security Options		
Minimum password length	characters. (l	(Leave blank for no limitation)
Number of days before password	expires	(Leave blank for no expiration)
Require both alpha and numeric c	haracters to exi	xist in the password
Force uniqueness of passwords u		istorical passwords. (Leave blank for no uniqueness check)
Force uniqueness of passwords up	p to n	number of days. (Leave blank for no date uniqueness check)
Number of invalid login attempts b	efore user is dis	isabled 5 (Leave blank for unlimited attempts)
3 1		
NOTE: To enable a disable	ed user accoun	nt go to the User view and clear the disabled checkbox
		nt go to the User view and clear the disabled checkbox.
		nt go to the User view and clear the disabled checkbox. word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co		
Process Server / LDAP Monitor Co	nnection passw	
Process Server / LDAP Monitor Co		word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co	nnection passw	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week	Enabled	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week 1 Monday	Enabled	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week 1 Monday 2 Tuesday	Enabled Yes v	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday	Enabled Yes V Yes V Yes V	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday	Enabled Yes v Yes v Yes v Yes v	word (Used to require password authentication for Process Server and LDAP
Process Server / LDAP Monitor Co Default Entry Access Times Line Day Of Week 1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday	Yes V Yes V	word (Used to require password authentication for Process Server and LDAP

Osci Options

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

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

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

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

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

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

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

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

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

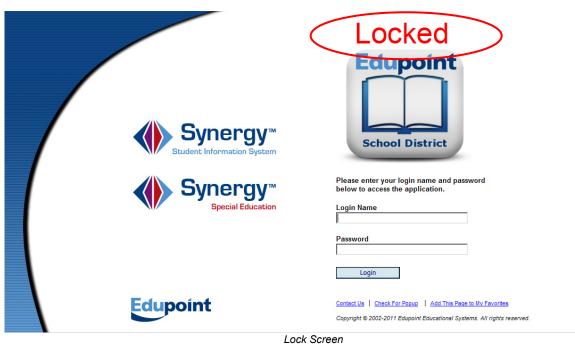
System Configuration	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
System Configuration	
Security Options Advanced	
Page Definitions	٢
Help System	٢
Fee System	٢
Map Options	٢
User Session State Management	٨
Time, in minutes, of inactivity before a lock screen is shown and will require the user to login to regain access	
Time, in minutes, of inactivity before all child windows are g999 closed, pending changes not committed and user is returned	
to a login screen	
Override the default Lock Screen text to the following:	
System Cache	٢
Pre-Installation Backup of MSSQL Server Database	٢
Capture User Performance Statistics	٨
Enable User Performance statistics	
Schools Interoperability Framework (SIF)	٢
Central Printing Defaults	٢
Application Login	٢

Options Tab

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

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

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



LOCK Screen

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

LDAP AUTHENTICATION

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



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

LDAP integration can occur at any of three levels.

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

	gh Authentication		
🗖 Allow pas	ss through authentication fo	r logins	
LDAP Integ	ration		4
Using LDAP	LDAP Server Type	Integration Type - Higher levels include the functionality of th	e prior level
		3. Create Users and Synchronize User Groups	~
Domain Nar	ne	Server Path (e.g. LDAP://myserver.com)	Secured via SSL
xnovahq		LDAP://az3.xnova.com	
	alo usluo I DAB ucor pror		is user property can be any
named sin Badge Nun WARNING:	mber property. This property must be bl	erty (e.g. description, info, etc.). The property value is m ank for all Students if Students exist in your LDAP.	
named sin; Badge Nun WARNING: User Proper	mber property. This property must be bl rty	erty (e.g. description, info, etc.). The property value is m	atched against the Staff
named sing Badge Num WARNING: User Proper	mber property. This property must be bl rty provide the ability to au	erty (e.g. description, info, etc.). The property value is m ank for all Students if Students exist in your LDAP.	atched against the Staff
named sing Badge Num WARNING: User Proper	mber property. This property must be bl ty provide the ability to au specified. The expected ty Staff Types to	erty (e.g. description, info, etc.). The property value is m ank for all Students if Students exist in your LDAP. to create staff and staff school year entries, the LDAP pro	atched against the Staff

LDAP Integration Options

To set up LDAP authentication for all integration types:

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

To set up Integration Type 1:

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

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

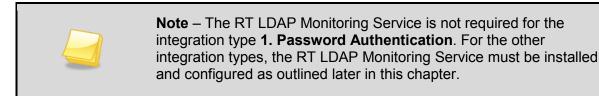
∀User											
User Name: User, T	eacher										
Demographics	rganizations	User Groups	Navigati	ion Menu	Securi	ty Settings	Focus	Spell Check	< PO	V	
Last Name	First N	ame M	viddle Na	me Dis	abled U	ser Type					
User	Teache	er 🔤			Г S	Staff 🛛 🔽					
Login	_		۵	Passwo	rd			٨	Dates		٨
Login Name	Email			Passwor	ď	Confirm) Passwor	d	User C	reation Date	
teacher	teacher@eo	lupoint.com							02/19/2	010 12:28:07	
Force Password	Change On	Next Login							Last Lo	ogin Date	
🗖 Exempt From LD	AP								04/20/2	010 15:07:07	
Address			0	Prefere	nces						
Address				Default I	vlode Pa	iging Size	Paging R	ow Size			
123 S Main				Edit	~						
City	State ZIP	Code +4		Show	Quick L	aunch					
Phoenix	AZ 🔽 850	104		Debug B	xniratio	n (Hours fr	om Now)				
				0	, and the second	r (noaro n					
				POV Ho	me Page						
							Change	POV Home Page	,		

User Screen

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

Pass Throug	h Authentication			6
Allow pas	s through authentication f	or I	gins	
LDAP Integr	ation			<u></u>
Using LDAP	LDAP Server Type		ntegration Type - Higher levels include the functionality of the prior level	
	Microsoft Active Directory	~	1. Password Authentication	
Domain Nam	ie		Server Path (e.g. LDAP://myserver.com) Secured via SSL	_
edupoint.loca	il		LDAP://servername.local	

Integration Type 1 LDAP Setup



To set up Integration Type 2:

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

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

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

∀User Groups						
User Group Name: Role - Nurse						
Members Organizations Navigation Menu Optio	ns Security Settings POV					
User Group Name	Ldap Name					
Role - Nurse	Nurses					
User Groups screen						

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

Pass Through Authentication			(
Allow pass through authentica	ion for	ogins	
LDAP Integration			(
Using LDAP LDAP Server Type		Integration Type - Higher levels include the functionality of the pr	ior level
Microsoft Active Direc	ory 🔽	2. Synchronize User Groups	~
Domain Name		Server Path (e.g. LDAP://myserver.com)	Secured via SSL
edupoint.local		LDAP://servername.local	

Integration Type 2 LDAP Setup



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

To set up Integration Type 3:

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

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

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

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



- 4. Enter the badge number from Synergy SIS into the selected property of the user accounts in the LDAP directory for all staff that need user accounts in Synergy SIS. If the user account in LDAP should not have access to Synergy SIS, such as student accounts, be sure to leave that property blank.
- Select a property assigned to users in the LDAP directory that can be used to store the Type from the Staff screen in Synergy SIS. Enter the LDAP name of that property in the Role Property box on the System Configuration screen.





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

Nam	ne: S	taff Type	Namespace:	K12 Locked: N						
٦	Jse C	ode as t	he State Coo	te - all values reported to state will	be used fri	om the lool	kup code a	nd not eva	iluate to ti	ne State C
Loc	okup	Values							Ad	id 🔇
						State		Alt Code		itus
Ň	× Line ListOrde	Code	Description		Code	Alt Code 3	SIF	Year Start	Year End	
	1	0	С	Counselor					~	*
	2	0	0	Office Staff					~	*
	3	0	S	System Administrators					~	~
	4	0	Т	Teacher					~	*

Staff Type Lookup Table

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

ser Group Name: Role - Nurse Members Organizations Navigation Menu Options Security Settings POV
Members Organizations Navigation Menu Options Security Settings POV
Iser Group Name Ldap Name
Role - Nurses
elect a user whose default saved report settings are used for report execution 🔶
IOTE: Currently, the default report preferences user for a group is only impelmented in TXP.
Default Use Menu Group for a new user added to this group
Navigation Tree 🛛 🖉 🔾
Health

Navigation Menu Tab, User Groups Screen

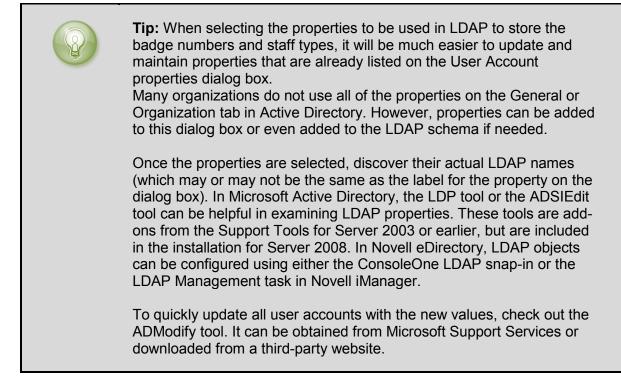
 On the Organizations tab of the User Groups screen, select Allow LDAP Monitoring to Create Staff School Year Entries to have the LDAP synchronization assign the first school listed on the tab to all users assigned to the user group in LDAP.

♥User Groups		
User Group Name: Update - Adams Elementary		
Members Organizations Navigation Menu Options Security S	Settings POV	
User Group Name Ldap Name		
Update - Adams Elementary		
Year Extensions		0
Possible Year Extensions		
🗖 Night 🔽 Regular 🗖 Summer		
Access Permissions		0
Previous Year(s) Current Year Nex	xt Year(s) Non Year	
Lindate 👻 Lindate 👻 Lind	date 👻 Undate 👻	
Allow LDAP monitoring to create staff school year entries for spe	ecific school organizations listed below.	
NOTE: Organizations above the school level will not be evaluated.	Ŭ	
Organizations	Choose	r 🔇
X Line Organization Name	Organization Update	
Adams Elementary	Update 🖌	
O I I I I I I I	<u> </u>	

Organizations Tab, User Groups Screen

- 9. On the **System Configuration** screen, under **Staff Types to allow LDAP to add staff school year entries,** check the box for each staff type that will be automatically assigned to schools in Synergy SIS based on the synchronization.
- 10. In the **Integration Type** list, select **3. Create Users and Synchronize User Groups**.

Pass Throug	jh Authentication	(
🔽 Allow pas	is through authentication for	logins						
LDAP Integr	ration							
	LDAP Server Type Microsoft Active Directory	Integration Type - Higher levels include the functionality of the prior level 3. Create Users and Synchronize User Groups						
Domain Nam	ne	Server Path (e.g. LDAP://myserver.com) Secured via SSL						
edupoint.loca	al	LDAP://servername.local						
WARNING: User Proper adminDescri	named single value LDAP user property (e.g. description, info, etc.). The property value is matched against the Staff Badge Number property. WARNING: This property must be blank for all Students if Students exist in your LDAP. User Property daminDescription							
must speci	ified. The expected value	o create staff and staff school year entries, the LDAP property representing Staff Type in LDAP is the role code (lookup K12.STAFF_TYPE).						
Role Proper department		allow LDAP to add staff school year entries						
System Configuration Screen								



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

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

[™] User Groups		«		
User Group Name: Role - Nurse				
Members Organizations Navigation Menu	Options Security Settings POV			
User Group Name	Name of user group in LDAP (if synching with LDAP)			
Role - Nurse	Nurses			
Select a user whose default saved report settin	igs are used for report execution +			
User Group Name: Role - Nurse Members Organizations Navigation Menu Options Security Settings POV User Group Name Name of user group in LDAP (if synching with LDAP) Role - Nurse Select a user whose default saved report settings are used for report execution NOTE: Currently, the default report preferences user for a group is only implemented in Teacher/VUE. Default Use Menu Group for a new user added to this group Navigation Tree Action				
C Default Use Menu Group for a new user add	ded to this group			
Navigation Tree	Action.	🔽 🔇		
▶ Health				

User Groups Screen, Navigation Menu Tab

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

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

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

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

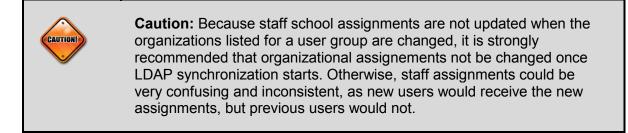
Once these conditions are met, the user is assigned to the first organization listed for the user group for the current school year set on the **District Setup** screen. This assignment is recorded on the **Schools** tab of the **Staff** screen.

√Staff									(4
Staff Name: User, Tes	t Type: Maintenance								
General Schools	SpecialEd Emergency	Credentials							
Last Name	First Name	Middle Name	Suffix G	ender	Туре				
User	Test		M	/lale 🔽	Maintenance	e 💌			
🗖 Assign To District	Show Hi	story							
Staff School Assignme	ents							Show	Detail 🔕
X Line Year	School 🔶	Old SIS Nur	nber 🗧	Home Room	🔶 Depar	tment 🍦	Job Class	Ş	FTE 🔶
1 2010-2011	Adams Elementary			+		~		*	
		0.4	ale Tale	Claff Care					

Schools Tab, Staff Screen

Other rules for staff school assignments are:

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

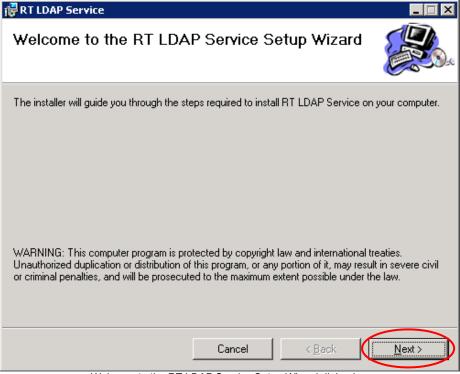


For the second or third integration type to occur, the RT LDAP Monitor service must be installed. Edupoint recommends that this service be installed on a process server, with both 3-2 and 64-bit versions available. To install the RT LDAP Monitor service:

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

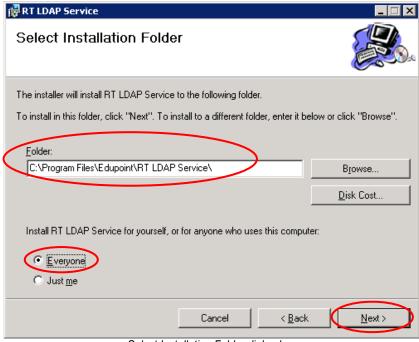
Folders		~	Name A	-	Date meaned	1.00-	-	Size	-
	20091124_RT64_Installers_5.50.3615	-	RTLDAPServiceSetup64.msi		11/24/2009 2:19			9,7691	
	DBToolsClient	_	🚺 setup.exe		11/24/2009 2:19	Application		457	КB
	DesignerSetup								
	PhotoAttachSetup								
	PXP64Setup								
	RT64DevSetup								
	RT64DevSetup2								
	RT64DevSetup3	- 1							
	RT64DevSetup1								
	RT64ProcessperviceSetup								
	🔑 RT64Setup								
	🐌 RTDashboard								
	퉬 RTScanningSetup								
	🐌 SASI3								
	🌗 SASIxp								
	🐌 SIREN								
	I	RT64L	DAPMonitor Folder						

3. Click the **Next** button.



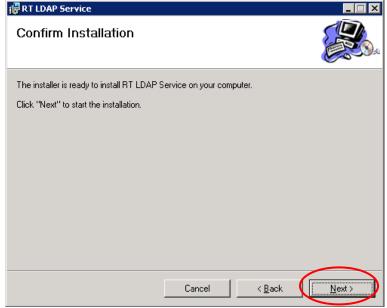
Welcome to the RT LDAP Service Setup Wizard dialog box

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



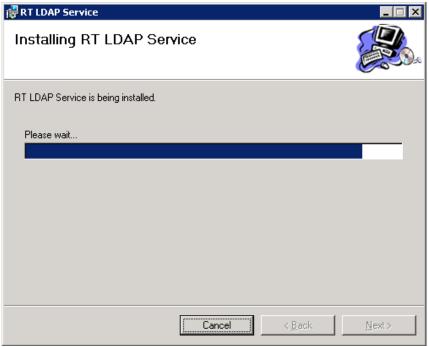
Select Installation Folder dialog box

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



Confirm Installation dialog box

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



Installing RT LDAP Service dialog box

🛃 RT LDAP Service	
Installation Complete	
RT LDAP Service has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical upo	lates to the .NET Framework.
Cancel	< Back
Installation Complete	dialog box

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

8. Click the **Close** button.

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

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



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

📑 RT LDAP Monitor Service Setup	
<u>Eile Tools H</u> elp	
LDAP Monitor Service - Stopped	
Options-	
Wait 0 📑 minute(s) between every check.	
Debug Mode: Off (Nothing gets written to the RT event log)	•
Server URL:	
http://	
Start Service Ok Close Ar	pply

RT LDAP Monitor Service Setup

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

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

📑 RT LDAP Monitor Service Setup	×
Eile Tools Help	
LDAP Monitor Service - Running	
Options	
Wait 100 minute(s) between every check.	
Debug Mode: On (Critical errors are written to the RT event log)	
Server URL:	
http://localhost/az	
Stop Service Ok Close Apply	

LDAP Monitor Service Running

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

≣∳RT	LDAP Mo	onitor Service Setu			
File	Tools	Help			
	S	tart Service	Monitor Service - Running		
— Optio	S	top Service			
	R	estart Service			
Wait	T	est LDAP Setup	eycheck.		
Debu	v v	iew AD Properties	vitten to the RT event log)		
Server URL:					
http:/	/localhost	t/az			
Sto	p Service	;	Ok Close Apply		
Tools Menu					

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

Test LDAP Setup Status	_ 🗆 >
5:23:40 PM: Begin test LDAP Connection 5:23:40 PM:	<u> </u>
5:23:40 PM: 5:23:40 PM: Connecting to the web server at 'http://localhost/az' 5:23:41 PM: Established connection to the web server. 5:23:41 PM: D8'server=SRV:1SC;database=DemoD8_AZ;uid=rev; 5:23:41 PM: L0AP_topration: Becareciduleation	
5/23.41 PM: *** ERROR *** : 1DAP Integration is not enabled. Please check the Using LDAP check box to enable LDAP in System Config and re-test.	
server=SRV-TSC;database=DemoDB_AZ;uid=rev;	
	~
4	Close

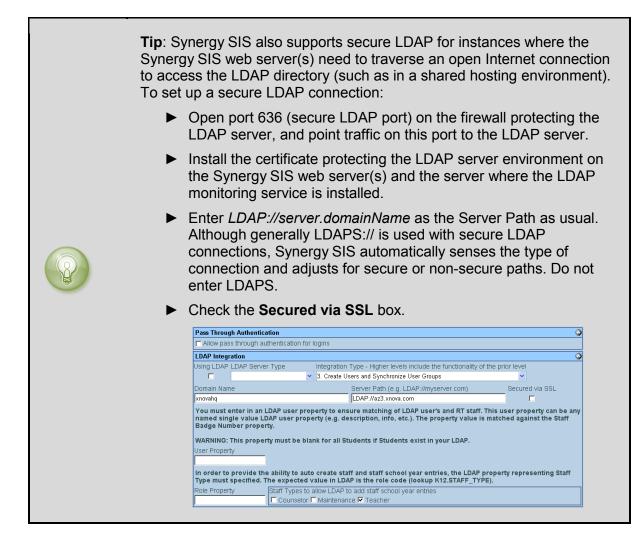
Test LDAP Setup Status

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

Active Directory Property Selector				
This list shows you the Active Directory properties a given user may have. Use this to help determine which properties will be used for LDAP Badge ID and LDAP Role.				
	Properties for account: Administrator Show properties from another account			
	Property Name	Property Value		
	accountexpires	0		
	admincount	1		
	adspath	LDAP://srv-tsc/CN=Administra	tor,CN=Users,DC=tsc,DC=local	
	badpasswordtime	0		
	badpwdcount	0		
cn Administrator				
	codepage 0			
	countrycode	0		
	description	Built-in account for administerin	g the computer/domain	
	displayname	Administrator		
	distinguishedname	CN=Administrator,CN=Users,D0	C=tsc,DC=local	
	dscorepropagationdata	7/24/2009 1:50:42 AM		
	instancetype	4		-1
		т		
			Cano	cel

Properties Displayed for User Account

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



PAGE DEFINITIONS AND HELP SYSTEM

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

ີ ∀System Configu	Iration
System Configuration	
Security Options Advance	d
Page Definitions	۵
Support Page	Help Page
Support.htm	Help/GENESIS Help List.htm
Contact Us - Set to an email a	ddress or URL (to hide link set value to 'remove')
Help System	۵
🔽 Enable Context Sensitive H	lelp
Help System	
RoboHelp 🔽	
Help System URL	
http://Genesis/Help_USA.AZ/US	SA.AZ

Page Definitions and Help System

ADDRESS MAPPING OPTIONS

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

Map Options		l
Enable Address Mapping		
Address Map Type	~	
	Map Options	

SYSTEM CACHE

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

System Cache	0	
Clear Cache 304		
System Cache		

PRE-INSTALLATION BACKUP

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

Pre-Installation Backup of MSSQL Server Database	6
Disable the pre-installation backup of the MSSQL Server database	
If the pre-installation backup is NOT disabled, enter the override location (on a local drive of the MSSQL Server) to contain the MSSQL Server database backup file (if left blank, the default path is C:\Program Files\Microsoft SQL Server\MSSQL\BACKUP on the MSSQL Server).	

Pre-Installation Backup of MSSQL Server Database

SCHOOLS INTEROPERABILITY FRAMEWORK (SIF)

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

Schools Interoperability Framework (SIF)	
Schedule the job queue task to process SIF transactions:	
Email the following address(es) upon failure e.g. user@server.net, user2@server2.com	
Hours to Recur Submit Job	

Schools Interoperability Framework (SIF)

CENTRAL PRINTING DEFAULTS

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

Central Printing Defaults	6
Enable Central Printing	
Job Description Number of Copies Job Type Three Hole Punch	
Fold and Seal 🗸 1 🔹 Simplex 💌 🔳	
Paper Size	
Letter 🗸	
Output Path e.g. \\SERVERNAME\Share\OutputFolder or C:\OutputFolder	
\\District\Print	

Central Printing Defaults

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

APPLICATION LOGIN

The Application Login option is covered in Chapter Five.



DISPLAY OPTIONS

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

LIST OPTIONS

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

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

ADVANCED

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

\mathbb{V}	Sys	tem Co	onfiguratio	n				«
Sys	tem	Configura	ation					
Se	ourity	Options	Advanced					
Glo	bal Ev	vents					Add	
×	Line		Event		Name	Views to Monitor		
\cap			LVCIN		name	Views with Primary BO	Specific View (blank = all views)	
	1	AfterRead	*		K12.Setup.StudentNotification ←	K12.Student 🖨	(
Icor	Icons							
X Line Icon Name			Name 🔶	File Name	e Icon			
	Questions Questions Questions Advanced Tab							

System Configuration Screen, Advanced Tab

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

Chapter Three: DISTRICT AND SCHOOL SETUP

This chapter covers:

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

DISTRICT SETUP

To set up the years available at each school:

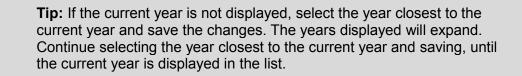
1. Go to Synergy SIS > System > Setup > District Setup.

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

♥District \$	Setup								
listrict Setup									
Options Syste	m Grade S	etup Teacher	/UE Labels	Auto-Sequence	Reports	Waivers	Mobile Apps		
Current System	Year 🙆	Year Permissio	ins				6	Summer School	(
Current Year	Base Year	Previous Year(s) Permissior	Current Year P	ermission	Next Year(s)) Permission	Summer School Year	Summer School Type
2010-2011 🛛 👻	2006	Update	*	Update	~	Update	*		×
Organization Ye	ear Tree								Action 💌 🤇
2005									
2006									
2007									
2008									
2009									
2010									
2011									
2012									
2013									
Staff Years									(
Last Staff Year Ir	ncrement Dal	te	Incr	ement Staff Years					
District Setup Op	ptions								6
Line Setup Option	ns								
1 District Acc	commodation	Setup							
2 District Dis	cipline Option	<u>ns</u>							

Options Tab, District Setup Screen

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



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

Na	Name: Year Extensions Namespace: Revelation.OrganizationInfo Locked: N											
	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C											
L	Lookup Values Add 📀											
							State		Alt Code		tatus	
×		Line	ListOrder	Code	Description	Other SIS	Code	Alt Code 3	SIF	Year Start	Year E	nd
Γ	1		0	N	Night						•	~
Γ	1	2	0	R	Regular					•	•	~
Г	1		0	S	Summer						•	~

Year Extensions Lookup Table

To add an extension to a year in the tree:

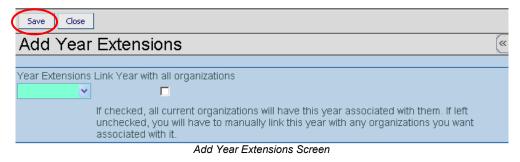
- 1. Click the year in the tree
- 2. In the Action... list, click Add Extension.

♡District Setup	(«
District Setup	
Options System Grade Setup TeacherVUE La	abels Auto-Sequence Reports Waivers Mobile Apps
Current System Year 🛛 🛇 Year Permissions	🔾 Summer School
	ssion Current Year Permission Next Year(s) Permission Summer School Year Summer School Type
2010-2011 🔽 2006 Update	Vpdate Vpdate V
Organization Year Tree	Action 💌 🛇
 ▶ 2005 ▶ 2006 ▶ 2007 ▶ 2008 ▶ 2009 ▶ 2010 ▶ 2011 	Action District Setup Add Extension to 2011 Year-Type Specific Setup Ime Setup Screens Inne Setup Screens Ime Setup Screens 1 District Attendance Code Ime Setup Screens 2 District Discipline Code Ime Setup Screens
▶ 2012 ▶ 2013	4 District Groups 5 District Tracks
Staff Years Last Staff Year Increment Date	Increment Staff Years
District Setup Options	0
Line Setup Options	
1 District Accommodation Setup	
2 District Discipline Options	3

Adding an Extension

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

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



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

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

♥District Setup								~
District Setup								
Options System Grade S	Setup TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps		
Current System Year 🖉 Year Permissions 🛛 🖓 Summer School 🛇								
		rmission	Current Year Pe	rmission	Next Year(s) Permission	Summer School Year	Summer School Type
Current Year Base Year			Current Year Pe Update	(100)	Next Year(s Update	i) Permission	Gummer School Year	Summer School Type

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

♥District Setup							«
District Setup							
Options System Grade S	Setup TeacherVUE	Labels Auto-Sequ	ience Reports	Waivers	Mobile Apps		
Current System Year 🛛 🚳	Year Permissions				6	Summer School	۵
Current Year Base Year	Previous Year(s) Pe	rmission Current Ye	ear Permission 1	lext Year(s) Permission	Summer School Year	Summer School Type
2010-2011 🔽 2006	Update	🖌 Update	~	Jpdate	~		~
Setting the Summer School							

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

♥District Setup		(
District Setup		
Options System Grade Setup Teacher/UE L	abels Auto-Sequence Reports Waivers Mobile Apps	
Current System Year 🛛 🛇 Year Permissions	🔾 Summer School	0
Current Year Base Year Previous Year(s) Perm	ission Current Year Permission Next Year(s) Permission Summer School Year S	Summer School Type
2010-2011 💌 2006 Update	Vpdate Vpdate V	~
Organization Year Tree	Action	_ Ø
▶ 2005		
2006	District Setup	
2007	Year-Type Specific Setup	٨
2008 2009	Line Setup Screens	
2009	District Attendance Code	
2011	2 District Discipline Code	
2012	3 District Course	
2013	4 District Groups 5 District Tracks	
Staff Years		<u></u>
Last Staff Year Increment Date	Increment Staff Years	
District Setup Options		۵
Line Setup Options		
District Accommodation Setup		
2 District Discipline Options		

Shortcuts in the District Setup tab

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

♥District Setup		(«
District Setup		
Options System Grade Setup TeacherVUE La	els Auto-Sequence Reports Waivers Mobile Apps	
Current System Year 🛛 🖓 Year Permissions	Q	Summer School 📀
	sion Current Year Permission Next Year(s) Permission	Summer School Year Summer School Type
2010-2011 🔽 2006 Update	Vpdate Vpdate V	
Organization Year Tree		Action 💌 📀
▶ 2005		
2006	District Setup	
2007	Year-Type Specific Setup	۵
2008 2009	Line Setup Screens	
2009	1 District Calendar	
▼ 2010		
Regular		
Night		
▶ 2012		
2013		
Staff Years		0
Last Staff Year Increment Date	Increment Staff Years	
District Setup Options		(
Line Setup Options		
District Accommodation Setup		
2 District Discipline Options		

Shortcuts available for extensions

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

Staff Years		
Last Staff Year Increment Date	P	Increment Staff Years
	Staff Years	

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

Distr	District Setup Options						
Line	e Setup Options						
1	1 District Accommodation Setup						
2	District Discipline Options						
3	3 District Fee Options						
District Setup Options							

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

The **District Fee Options** link sets the options for how fees are paid, prorated, and waived. For information about fees setup, see the *Synergy SIS – Fees Administrator and User Guide*. The **System** tab of the **District Setup** screen controls options used throughout Synergy SIS:

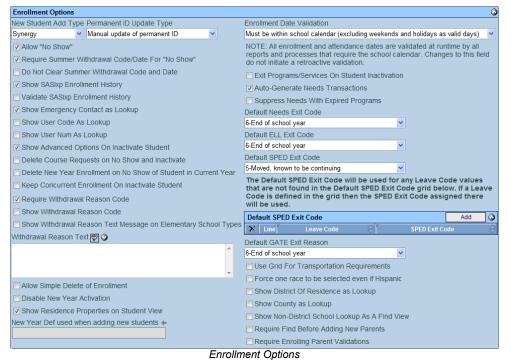
✓District Setup						
District Setup						
Options System Grade Setup TeacherVUE La	abels Auto-Sequence	e Reports Waivers Mobile Apps				
Enrollment Options		Q				
New Student Add Type Permanent ID Update Type Synergy	ID 👻	Enrollment Date Validation Must be within school calendar (excluding weekends and holidays as valid days)				
Synergy Genesis update of permanent		NOTE: All enrollment and attendance dates are validated at runtime by all				
Require Summer Withdrawal Code/Date For "No	Show"	reports and processes that require the school calendar. Changes to this field do not initiate a retroactive validation.				
Do Not Clear Summer Withdrawal Code and Date	•	Exit Programs/Services On Student Inactivation				
Show SASIxp Enrollment History		✓ Auto-Generate Needs Transactions				
Validate SASIxp Enrollment History		Suppress Needs With Expired Programs				
Show Emergency Contact as Lookup		Default Needs Exit Code				
Show User Code As Lookup		6-End of school year				
Show User Num As Lookup		Default ELL Exit Code 6-End of school year				
Show Advanced Options On Inactivate Student	-4-	Default SPED Exit Code				
 Delete Course Requests on No Show and Inactiv Delete New Year Enrollment on No Show of Stude 		5-Moved, known to be continuing				
Keep Concurrent Enrollment On Inactivate Stude		The Default SPED Exit Code will be used for any Leave Code values				
	in and a second s	that are not found in the Default SPED Exit Code grid below. If a Leave Code is defined in the grid then the SPED Exit Code assigned there				
Require Withdrawal Reason Code Show Withdrawal Reason Code		will be used.				
Show Withdrawal Reason Code Show Withdrawal Reason Text Message on Elem	entary School Types	Default SPED Exit Code Add				
Withdrawal Reason Text P 🖓	entary centron rypes	X Line Leave Code ⇔ SPED Exit Code ⇔				
	*	Default GATE Exit Reason				
		6-End of school year				
	-	Use Grid For Transportation Requirements				
Allow Simple Delete of Enrollment		Force one race to be selected even if Hispanic Show District Of Residence as Lookup				
Disable New Year Activation		Show County as Lookup				
Show Residence Properties on Student View		Show Non-District School Lookup As A Find View				
New Year Def used when adding new students (Require Find Before Adding New Parents				
		Require Enrolling Parent Validations				
Disable Add, Drop, and Transfer		Q				
Disable ability to add, drop, and transfer student	s.(overrides grid belo	w)				
Enter a begin and end time during which users will	not be able to add, dr					
Disable Add, Drop, and Transfer						
Line Day of Week Begin E	nd					
1 Sunday						
2 Monday						
3 Tuesday						
4 Wednesday						
5 Thursday 6 Friday						
7 Saturday						
Address Options Allow to prompt user to synchronize address and	/or phone number ch	anges for all family members living together when one member's address and/or				
phone number is changed	for phone number en	anges for all failing memory wing together when one memory address analor				
	one number even the	ough the user may not have organizational access to do so				
Track student, parent and staff address changes						
Require address change date when student hom	e address is changed	i				
Enable School Grid Code By Grade Level Overri	da					
/	ue					
Address Validation Type Search Only on Street Number and Street Name						
Enforce Validation on +4 Portion of Zip Code						
Disable clean/parse and address validation for h	ome addresses					
School Of Residence Option						
Default School of Residence from Grid Code; allow manu	ual override 💌					
Require Attendance Reason Code if School of Re	esidence does not Ma	atch School of Attendance				
Require School of Residence						
Clear School of Residence on launch of Student	Add view					
Bulk Mailing		<u> </u>				
	Mail Barcode Data					
PRESORTED Barcode ID		ce Type ID				
U.S. POSTAGE PAID	~	<u>▼</u>				
1234 Padded Ma	iler ID Length Maile					
	atom Toh D	istrict Setup Screen				

(continued on next page)

Grading Setup		۵				
		wing a student's class to history (IE when a leave date is entered). If				
	Minimum Class Enrollment Days field is disreg	-				
Minimum Days Enrolled Grading Thre	shold	Include in Grade Option				
		~				
) will not be filtered and all definitions will show in both views (Student				
Grade and Student Course History). If the option is left unchecked then the current functionality will remain. Student Grade will only show Current Period Only GPA types and Student Course History will only show Course History Only types.						
	History will only show Course History Only typ	Jes.				
GPA Filter Option						
Always update completed credit or	n mark change in Student Course History					
Audit Class Options		<u>م</u>				
Allow student classes to be flagger	d as audited	~				
	audited classes should be displayed in repor	IS:				
Audit Symbol Show Audit S	ymbol After					
* Course ID	~					
Other Options		0				
Discipline Type	Incident Violation Display	District Group History Filter				
Incident 👻	Entire Violation	×				
Student Notification	Badge Number Update Type					
Icon 🗸	v					
	Adult ID Update Type					
Disable Unique State Number						
Allow Negative Seat Totals						
Enable Announcement Dismissal	Fee Total Type					
	Include fees for all organizations and all years					
Enable historical tracking of staff in	n sections					
Auto Assign District Staff To School	ols					
Validate Student Classes						
Show Warning and Allow Data to be Sav	red if Student Classes Overlap					
-						
Student Profile Report Release State	ment 🖤 🔾					
	*					
	*					
Class Attendance Signature Text 🐺	3					
	A					
	-					
Course ID Print Width						
Course ID Film Width						
Use Course Short Title						
		d when adding new Course History records or when running the Update				
Student Course History process. If Sh	nort Course Title is blank, then the full Course	Title will be used instead				
Parent Filtering						
Enable Parent Filtering	×					
Show Course History Mark As Loo	kup					
Do not allow same parent to be ad	Ided to a student with multiple relationships					
Use Group State Reporting						
Display Student Test ID						
SIS Data Import Options		<u> </u>				
SIS Data Import Error Email Contact						
Attach XML Rules						
Graduation Requirements		(
Enable Verified Credit						
Diploma Type Overrides		Add 🐼				
X Line	Diploma Type	Display Name				
Communication Options		(
Enable Streams						
Photo Attach		(
Setting this value will override the det	fault URL which is set as the URL from the we	b server in your farm. This option will most commonly be used if the				
web farm is behind a load balancer a	nd users do not have direct access to the we	b farm servers. The URL most commonly used should be the URL				
users put into their browser to access	s Synergy. The URL should start with http://.					
Photo Attach URL Override						

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

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



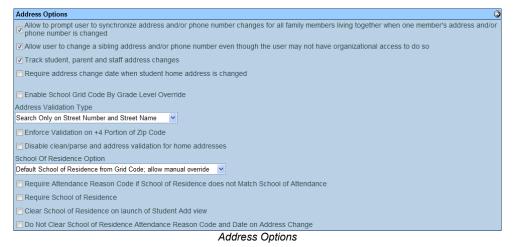
More information about transitioning schools to a new school year is in the *Synergy SIS – New Year Rollover Guide*. That guide describes the **Delete Course Requests** on No Show and Inactivate, **Delete New Year Enrollment on No Show of Student in Current Year**, **Disable New Year Activation**, and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

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

Disat	ole Add, Drop,	and Transfer									
🗖 Di	Disable ability to add, drop, and transfer students.(overrides grid below)										
Enter a begin and end time during which users will not be able to add, drop, or transfer students											
Disable Add, Drop, and Transfer											
Lino	Day of Week		ime Period								
		Begin	End								
1	Sunday										
2	Monday										
3	Tuesday										
4	Wednesday										
5	Thursday										
	Friday										
7	Saturday										

Disable Add, Drop and Transfer

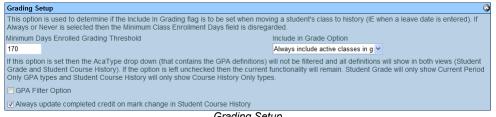
 Address Options – these options control how student and parent addresses are treated. The impacts of these options are described in the Synergy SIS – Student Information Administrator Guide.



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

Bulk Mailing									
Postage Text 🕎 📀		Intelligent Mail Barcode Data			0				
PRESORTED	~		Barcode ID		Service Type I	D			
FIRST-CLASS U.S. POSTAGE PAID			10	*	700	*			
1234			Padded Mailer I) Length	Mailer ID				
	Ŧ		6 digits	*					
	Bulk Mailing								

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



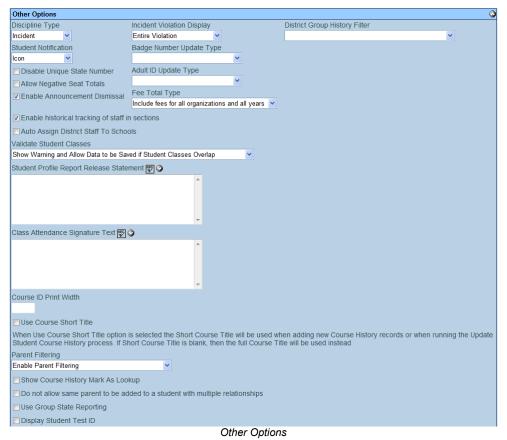
Grading Setup

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

Audit Class Options		6								
Allow student classes to be flagged as audited										
The following options determine how audited classes should be displayed in reports:										
Audit Symbol	Show Audit Symbol After									
*	Course ID									

Audit Class Options

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



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

Participants Violation										
Number Description										
2 Dangerous Items > Firearms > Handgun										
Category	Violation									
Dangerous Items 🗸 🗸	Firearms 💌									
Violation Detail	Severity Level									
Handgun										
	reen, Violations Tab, Detail									
Participants Violation										
Number Description										
2 Handgun										
2 Handgun										
2 Handgun Category	Violation									
, ,	Violation Firearms									

Incidents Screen, Violations Tab, Detail

Handoun

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

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



SIS Data Import Options

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

Graduation Requirements		٥
Enable Verified Credit		
	Graduation Requirements	

• **Communication Options** - this option enables the Streams Collaboration Tool, an easy-to-use and intuitive social media-type interface. Users can create private 'Streams' to communicate with other staff, in addition to being able to create groups

where content can be shared with several users at one time. Communication occurs via posts – users can post documents, web links, and text to a Stream, as well as respond to others' posts. To encourage and facilitate home/school collaboration, parents and students can communicate with teachers via the Streams tab in ParentVUE and StudentVUE, if allowed by the district. Users and user groups can be secured from this screen, if desired, using PAD Security. Teachers, who typically do not have access to Synergy SIS outside of TeacherVUE, access Streams via the Streams menu in Grade Book.

Communication Options	Q
Enable Streams	
Communication Options	

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

Photo Attach	Q
Setting this value will override the default URL which is set as the URL from the web server in your farm. This of a load balancer and users do not have direct access to the web farm servers. The URL most commonly used Synergy. The URL should start with http://.	
Photo Attach URL Override	

Photo Attach URL Override

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

Lookup Values Add 🔾											
_						State		Alt Code		atus	
×	Line	ListOrder	Code	Description	Other SIS Code Alt Code 3 SIF		SIF	Year Start	Year End		
	1	1	090	PS	15	PS			~	~	
	2	2	100	К	00	KG			~	~	
	3	3	110	01	01	1			*	~	
	4	4	120	02	02	2			*	~	
	5	5	130	03	03	3			*	~	
	6	6	140	04	04	4			~	~	
	7	7	150	05	05	5			~	~	
	8	8	160	06	06	6			*	~	
	9	9	170	07	07	7			~	~	
	10	10	180	08	08	8			~	~	

Grade Lookup Table



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

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

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

The **Student** screen, **Other Info** tab, **Graduation Information** section shows the student's **Ninth Grade Entry Year** and **Calculated Graduation Requirements Year**.

3. In the **Grades** section, select the grade level that follows each grade from the **Next Grade** list.

Y	Distr	ict Setup										» 🔥 🕠 🖗
Distric	t Setup											
Opti	ons	System Grad	e Setup	TeacherV	UE	Labels	Au	to-Sequence	Re	oorts	Waivers	Mobile Apps
	uation	Grade										
12		~										
		Requirements		culation M				It Value for try Year" is				
		o Ninth Grade Er	-		*	the "Gr	adu	ation Requ	remen	ts Ye	ar Calcula	tion
Years To Add to the 9th Grade Entry Year Method" option is set to Add Years to Ninth Grade Entry												
4						Entry y				my a		e sur Grade
Grad	les						0					
Line	Grade	Next Grade	Years		ADA (бгоир						
	PS	К	Gradua	ation			~					
2	г з К		✓ 13✓ 12		К		*					
	01		12✓ 11		01-03	2	*					
	02		✓ 10		01-03		~					
	03		v 9		01-03	·	~					
	04	••	v 8		04-06		~					
	05		v 7		04-06		~					
8	06	07	× 6		04-06	i	~					
	07	08	✓ 5		07-08	}	~					
10	08	09	× 4		07-08	}	~					
	09	10	√ 3		09-12	2	~					
12	10	11	× 2		09-12	2	~					
13	11	12	√ 1		09-12	2	~					
14	12		√ 0		09-12	2	~					
15	12+		~				~					

Grade Setup Tab, District Setup Screen

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

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

🗖 Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State q												
Lookup Values Add 🔾												
						State		Alt Code	St	Status		
×	Line	ListOrder	Code	Description	Other SIS	Code	Alt Code 3	SIF	Year Start	Year End		
	1	1	А	К					~	~		
	2	2	В	01-08					~			
	3	3	С	09-12					~			

ADA Grade Group Lookup Table

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

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

VDistrict Setup										
District Setup										
Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps		
The number of days historically, the teacher can take attendance 2										
Use Valid School Days Instead of Calendar Days for TeacherVUE Historical Attendance										
Allow te	eacher to s	send communic	ations in Teacl	herVUE						
C Enable	Special E	d IEP Access ir	TeacherVUE							
Show Deceased Parents / Guardians in TeacherVUE										
Allow te	eacher to e	enter notes for	students in Tea	acherVUE	1					
		Tor	chor\// IE T	ah Dia	trict Setup Sci	non				

TeacherVUE Tab, District Setup Screen

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

♥District Setup												
District Setup												
Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps				
Grading Labels												
Default G	Default Grading Label											
Avery 5160) Mailing La	abels 1"x2 5/8"			~							

Labels Tab, District Setup Screen

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

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

	strict Se	etup						
)istrict S	etup							
Option	s System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps
Changii make si	ng these valu ure that the r	ues can potenti new value is no	ally cause mul t currently in u	tiple obje se and w	cts to use the sam ill never collide wit	ne sequenc th another r	e number number th	. When changing a value at is in use.
Auto-S	equence							Ğ
Line			Increment	Кеу		ę	∂	Sequence 🗧
1 <mark>K</mark>	12.Staff.Badg	geNum					3	
2 <mark>K</mark>	<12.Student.SisNumber				997012			
3 <mark>K</mark>	K12.TestInfo.Setup.Test.TestScanSheetNumber			10059				
4 S(SCHINCDISP_2009				1			
5 S(SCHINCDISP 2010				1			
6 S (SCHINCDISP 87F1A309-F058-43E4-B55B-EF9AE4602639			1				
7 S(CHINCIDENT	2009					2	
8 S(CHINCIDENT	_2010					3	
9 <mark>S(</mark>	CHINCIDENT.	_87F1A309-F0	158-43E4-B558	B-EF9AE	4602639		2	
10 S(CHINCVIOL_	2009					1	
11 S(CHINCVIOL_	2010					8	
12 S	CHINCVIOL (87F1A309-F05	8-43E4-B55B-	EF9AE4	602639		2	

Auto-Sequence Tab, District Setup Screen

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

♥District Setup	(«
District Setup	
Options System Grade Setup TeacherVUE Labels	Auto-Sequence Reports Waivers Mobile Apps
Report Options	Chooser 📀
Report Number Name	Show Footer Boiler Plate
Footer Boiler Plate 🕎 📀	
Phone Number Options	۵
Mask Phone Numbers	
Mask unlisted phone numbers 🛛 💌	

Reports Tab, District Setup Screen

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

∀Dist	rict Se	etup								~
District Setu	ıp									
Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps		
Subject A	rea Waive	ers							Add	
X Line	Orde	er 🚔	Waive	e Credit Fro	m 🗧		Transf	er Credit To		\Rightarrow
College V	Vaivers								Add	
X Line	Orde	er 🔶	Waive	e Credit Fro	m 🗧		Transf	er Credit To		Ş
University	/ Waivers								Add	
X Line	Orde	er 🔶	Waive	e Credit Fro	m 🗧		Transfe	er Credit To		\Rightarrow
			M/oivor	Toh D	istrict Setur S	aroon				

Waivers Tab, District Setup Screen

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

♥District Setup	(«
District Setup	
Options System Grade Setup TeacherVUE Labels Auto-Sequence Reports Waivers	Mobile Apps
Disable Mobile Apps	٨
AdminVUE App	
ParentVUE App	
StudentVUE App	
TeacherVUE App	
HealthVUE App	

Mobile Apps Tab, District Setup Screen

ORGANIZATION

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

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

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

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

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

To define the district organization:

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

Menu V 😂 Save Undo	Form Status: Ready (Update Mode) 🛛 🖓 🖓
♥Organization	×
	Action 💌 🕥
Sample School District	

Organization Screen

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

Menu 🕶 🥽 Save Undo	Form Status: Ready (Update Mode)
♥Organization	(•
	Action
Sample School District	Organization Name: Sample School District
	District Special Education
	District Setup Options
	District Information
	Organization Name District Number
	Sample School District
	County Code
	Address Information
	Address
	Address2
	City State Zip Code + 4
	Other Information
	Phone Phone2
	Website URL
	lmages Q
	No Logo
	Edupoint
	On file
	Attach Printed Logo
	No Logo
	Edupoint
	On file
	Attach Title Image
	No Logo
	No Logo Edupoint
	On file
	Attach Login Logo

Organization Screen, District Information

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

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

- 5. In the **Images** section, upload the district logo to be used on screen and in printed reports. Three logos can be uploaded the printed logo, the title logo, and the login logo.
 - The printed logo is displayed on reports. School and other organization logos may also appear on reports, but the title and login logos are always the district logo.



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

	Edupoint	Hope High School Yes:2011-2012 User Admin User Show active and inactive
🕂 🕂 🗐 💀 🏠 Quick Launch	Γ _N	Lock Sign Out Support Help
	Title Logo	
• The login logo an	pears on the login nage	

• The login logo appears on the login page.

Syncergy Student Information System Syncergy Syncergy Special Education	Ecleption School District School District Login Name Password Login
Edupoint	Contact Us Check For Popup Add This Page to My Favorites Copyright © 2002-2011 Edupoint Educational Systems. All rights reserved.
 Login L	ogo

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

Attach Logo for Edupoint School District					
Steps To Upload Image:					
 Click Browse and select the file you wish to upload 					
2) Click Upload					
Browse					
Upload Clear Image					
Attach Screen					

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

√Organization		«
	Action	• •
Sample School District	Organization Name: Sample School District	
	Distric Special Education	
	General	٢
	Arizona	٢
	California	٢
	National	٢
	Virginia	٢

Organization Screen, Special Education Tab

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

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

Menu 🔻 🥁 🛛 Save 🔍 Undo		Form Status: Ready (Update Mode)
∀Organization		(
		Action
Sample School District	Organization Name: Sample School Distri District Special Education District Setup Options	et Action Add Organization to Sample School District Add School to Sample School District Delete Sample School District
	District Information	Q
	Organization Name District I	Number
	Sample School District	
	County Code	

Organization Screen, Adding Organization or School

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

Save Close				
VirtualRoot				(«
Address Information				<u>ن</u>
No Logo Edupoint	Organization Name		Organization Abbr Nar	ne
On file	District of Service			
Attach Logo	Address		-	
	Address2		-	
	City	State	Zipcode	
Phone Numbers				٥
Phone Phoi	ne2			
		Vir	tualRoot Screen	

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

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

Save Close					
School					<
School School Information					
No Logo	School Name	School Code	Alt ID	School Type	
Edupoint				×	
On file	Abbr School Name				
Attach Logo					
	Principal Name 🔶				
Address Information				٥	
Address					
Address2					
City St	tate ZIP Code + 4				
City St					
Mare We					
Map it!					
Other Information				Q	
Phone Fax	Counselor Dept Phone				
Sis School Code State	CTDS Code Alt Funding School Co	de College Board School	Number		
Sis School Code State	CTDS Code Air Funding School Co	de college board School	Number		
Website URL					
Default Email Address					
Live In Synergy					
Hide Organization F	rom General Use				
Central Print ID					
to update this value, ch	hange State CTDS Code.				
Health Notification	Safaty Spacialist Email				<u></u>
Head Nurse Email	Safety Specialist Email				
L					

School Screen

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

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

									_		
Lo	okup	Values			_					Add	_
¥	Lino	ListOrder	Code	Description	Other SIS	State	Alt Code 3	Alt Code	Year	Stat	
	LIIIE	LISTOLIA	Coue	Description	Other Sis	Code	AR COUE J		Year Start		Year End
		0	1	Elementary School		1				~	•
	2	0	2	Middle School		2				~	•
		0	3	High School		3				~	•
Г		0	4	Special School		4				~	•

School Type Lookup Table

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

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

♥Organization		~
	Action 👻	٨
Edupoint School District I. Elementary Schools	Organization Name: 1. Elementary Schools	
Adams Elementary	Address Information	٢
 Grant Elementary 	Phone Numbers	٢
Jefferson Elementary	Other Info	٢
 Lincoln Elementary Washington Elementary 	Parent Organization	
2. Middle Schools	Selecting a new Parent will move this organization in the organization heirarchy	
3. High Schools	Parent Organization	
4. Special Schools	Edupoint School District	
5. Closed Schools		
	2. Middle Schools	
	3. High Schools	
	4. Special Schools	
	5. Closed Schools	
	Edupoint School District	

Changing Parent Organization for an Organization

♥Organization							«
			Action			•	٩
Edupoint School District	School Na	ame: Ad	ams Elementary				
▼ 1. Elementary Schools	School	Voare	Special Education	n Documents			
Adams Elementary	i	-		n Documents]	
 Grant Elementary 	School In	formation					
 Jefferson Elementary 	Address I	Informatio	n		Q		
Lincoln Elementary	Other Info	rmation					
Washington Elementary A Middle Schools	Parent O	rganizat	tion				
 3. High Schools 				nie organization in	the organization heirar	chy	
4. Special Schools	` ۱			lis organization in	the organization heiran	LIIY	
 5 Closed Schools 	Parent O	<u> </u>					
	1. Eleme	ntary Sch	iools 💙				
							\odot
	^L 1. Eleme	ntary Sch	nools				
	2. Middle	Schools					
	3. High S	chools					
	4. Specia	I School	5				
	5. Closed	Schools					
	Edupoint)istrict	o / /			

Changing Parent Organization for a School

Additional options to be set up for the school:

School tab

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

Vorganization		«
	Action 👻	٥
 Edupoint School District 1. Elementary Schools 	School Name: Adams Elementary	
Adams Elementary	School Years Special Education Documents	
Grant Elementary	School Information	
Jefferson Elementary Lincoln Elementary	Address Information	
Washington Elementary	Other Information	
2. Middle Schools	Phone Fax Counselor Dept Phone	
3. High Schools	949-555-2425	
 4. Special Schools 5. Closed Schools 	Sis School Code State CTDS Code Alt Funding School Code	
	101 123456101	
	College Board School Number	
	Website URL	
	Default Email Address	
	✓ Live In Synergy	
	Hide Organization From General Use	
	Central Print ID	
	to update this value, change State CTDS Code.	
	Alternate Information	
	Alternate District CTDS	
	NCES School Number	
	Parent Organization	٢
	Health Notification	0
Deteil		W

Detail View of School, Organization Screen

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

Years tab

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

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

Sch	ool Years Special Education Documents		
Year	Options Grid	Add	
Line	School Year(s)		
1	2006-2007		
2	2007-2008		
3	2008-2009		
4	2008-2009 Summer		
5	2009-2010		
6	2009-2010 Summer		
7	2010-2011		
8	2011-2012		

Years Tab, Organization Screen

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

Save Close	
OrganziationYearAdd	(«
Organization Year Choices	

Organization Year Add Screen

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

Special Education tab

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

School Years Special Education	Documents
School Type	District
Public Day School	💌 District Name 💌

Special Education Tab, Organization Screen

Documents tab

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

1. Click the **Add** button.

School Years	Special Education	Documents			
Documents				Add	
X Line Doc Date	e Doc Ca	tegory	Doc Comment		Doc Type

Documents Tab, Organization Screen

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

Attach document
Steps To Upload Image:
1) Click Browse and select the file you wish to upload
2) Click Upload
Browse
Upload
Attach Document Screen

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

Sc	hool	Years	Special	Education Documents				
Do	Documents Add							
×	Line	Doc Date		Doc Category	Doc Comment		Doc Type	
	1	12/08/2009) 🗗	×	School Policy.txt		\Box	
	Adding a Document							

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

Nan	Name: Attach Doc Category Namespace: Revelation Locked: N									
	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C									
Lookup Values Add										
~				Description Other SIS State Code Alt Code		Alt Code	Sta	tus		
	Line	ListOrder	Code		Other SIS	Code	AIT Code 3	SIF	Year Start	Year End
	1	0	01	Personal Document					~	~
	2	0	02	Birth Certificate					~	~
	3	0	03	Consent Form					~	~
	4	0	04	School Project					~	~

Attach Doc Category L	ookup	Table
-----------------------	-------	-------

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

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

SCHOOL SETUP

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

School Name: Hope High School School Year: 2012-2013 Basic Info Options State Options State Options Labels Teacher/VUE Period Definition Options State Period End Period Homeroom Period Homeroom Meeting Day School Type School Type School Attendance Type	
Period Definition	
	6
School Attendance Taken School Attendance Reason Type By Section Regular	
Grade Attendance Calculated	
Concurrent Enrollment Type	
Full Concurrent - Able to send and receive concurrent students	
ALC school Type School Category Calendar Type	
Regular V	
Grade Selection Grading Options Roll Over Defaults	
Grade Grading Period Enter Code Enter Date	
□ PS □ K □ 01 □ 02 □ 03 □ 04 Second Quarter ▼ E2-First Arizona enroll ▼ □ □ 05 □ 06 □ 07 □ 08 ▼ 09 ▼ 10 Update Course History From □ <th></th>	
	_
Term Definition Add Show Detail	
X Line Term Number 🗧 Term Name 🕀 Term Begin Date Term End Date 🖨 Current Term Codes	
□ 1 Fall 08/28/2012 12/21/2012 📝 S1, YR	
Image: 2 2 Spring 12/31/2012 08/26/2013 Fill S2, YR	
Track Selection	0
Tracks	
4 Day Week 5 Day Week	
	_
Policy Code Det 2	
Waiting List Available	
Other Info	<u></u>
Exclude from State Reporting Validate Student Classes Scheduling Options Show Warning and Allow Data to be Saved if Student Classes Overlar Traditional Schedule Tracking (Default)	
	_
Enable College Credit Default Locker Combination Improvement Status	
Charter School	
Generic Teacher Aide Course	۵
Course ID 🔶 Course Title 🔶 Credit Given	
TA999 Teacher Alde From Section Credit	
Programs	0
All students enrolled in this school year are in the RM program.	
Programs / Needs	٩
riograms/ neeus Line Description Detail Detail	
Language Arts (Verbal) Giftedness Show Detail	
	0
Mailing Permit Setup	
Mailing Permit Setup Permit City Permit State Permit Number	

School Setup Screen, Basic Info Tab

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

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

Nam	Name: School Policies Namespace: K12.Setup Locked: N										
٦٦	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code										
Lo	Lookup Values Add 🔇										
			Code 🚔			Other 🔥	State 🔺	Alt	Alt Code 😂	Status	
$^{\mathbf{x}}$	Line	ListOrder 🔶	Code 🗧	Description		sis 🔻	State Code 🖨	Code 3 🔻	Code \ SIF	Year Start ⊜	Year End €
	1	1	1	All Day Kindergarten						~	~
	2	2	2	Waiting List Available						~	~

School Policies Lookup Table

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

Name: Improvement Status Namespace: K12.Setup Locked: N										
Lookup Values Add										
×	Line	ListOrder 🖨	Code 😂	Description 🔶	Other SIS ⇔	State Code ≑	Alt Code 3 🖨	Alt Code ⊜ SIF	Sta Year Start ⊖	tus Year End ≑
	1	0	00	Adequate Yearly Progress					~	~
	2	5	05	Warning					*	*

Improvement Status Lookup Table

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

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

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

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

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

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

ΥS	chool Setup
Schoo	DI Name: Hope High School School Year. 2010-2011
Basi	c Info Options SIS Data Options Labels TeacherVUE
Scho	ol Setup Options
Line	Setup options
1	Grading Setup
2	Parent/UE and Student/UE School Configuration
3	Period Rotation Definition
4	School Attendance Code
5	School Attendance Options
6	School Calendar
7	School Course
8	School Discipline Code
9	School Disposition Code
10	School Group Letters
11	School Groups
12	School Room
13	School Scheduling Options
14	Special Ed School Team
15	<u>State Requirements</u>

Options Tab, School Setup Screen

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

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

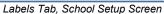
The **SIS Data Options** tab of the **School Setup** screen sets up the link to the previous student information system for conversion to Synergy SIS. These options are explained in the *Synergy SIS – Data Conversion Guide*.

VSchool Se	etup	«
School Name: Hope	High School School Year: 2010-2011	
Basic Info Options	SIS Data Options Labels Teacher/UE	
SIS Options		0
Old SIS Number 4273	Next Available SIS Number Path to SIS Data Files	
4273	3164	
Conversion Server	Push Back To Old Sis System	

SIS Data Options Tab, School Setup Screen

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

School Setup	(
School Name: Hope High School School Year: 2010-2011	
Basic Info Options SIS Data Options Labels Teacher/VUE	
Grading Labels	<u> </u>
Default Grading Label	
Avery 5160 Mailing Labels 1"x2 5/8"	



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

School Setup		(«
School Name: Hope High School School Year: 2012	-2013	
Basic Info Options SIS Data Options Labels	TeacherVUE	
Global Attendance Security		
Primary Staff Additional Staff		
Update V Update V		
Global Grading Security		0
Primary Staff Additional Staff		
Update V Update V		
Lunch Counts		۵
Take Lunch Counts for Homeroom Classes		
Lunch Description 1	Lunch Description 6	
Lunch Description 2	Lunch Description 7	
Lunch Description 3	Lunch Description 8	
		_
Lunch Description 4	Lunch Description 9	_
		-
Lunch Description 5	Lunch Description 10	_
Incident Referral		<u></u>
Incident Referral Default Refer To		
Vesta, Cindy	Tab. Oakaal Oatum Oamaan	

TeacherVUE Tab, School Setup Screen

COPY SCHOOL SETUP

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

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

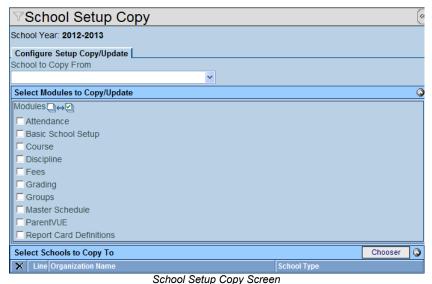
- Any module the year and year extension must be set up for the school in the Organization screen.
- Attendance the basic school setup must already be copied or must otherwise exist at the school.
- **Grading** the attendance setup and basic school setup must already be copied or must otherwise exist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



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

To copy school settings:

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



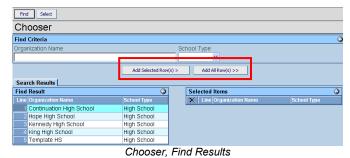
- 2. Select the **School to Copy From**.
- 3. Check the modules to copy. To check or uncheck all of the modules, click the Check/Uncheck All □↔ button.
- 4. Select the schools to copy the setup to by clicking the **Chooser** button.

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

Find Select					
Chooser					
Find Criteria					٩
Organization Name		School Type			
		~			
	Add Selected Row(s)	> Add All R	ow(s) >>		
Search Results					
Find Result	(Selected Ite	ms	6	>
Line Organization Name	School Type	🗙 Line Or	ganization Name	School Type	
r	Choose	r Screen			

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

The school names are moved to the Selected Items grid.



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

Find Select									
Chooser									
Find Criteria					()				
Organization Name		Scl	hool	Туре					
	Add Selected Row	(s) >	1	Add All Row(s) >>					
Search Results									
Find Result	۵]	Sel	ected Items	٥				
Line Organization Name	School Type		X	Line Organization Name	School Type				
1 Continuation High School	High School			1 Kennedy High School	High School				
2 Hope High School	High School			2 King High School	High School				
3 Template HS	High School			0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0					

Chooser Screen, Selected Items

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

Menu V Update Setup	Form Status: Ready (Update Mode) 🛛 🖓 🏹 🍕
VSchool Setup Copy	(«
School Year: 2009-2010	
Configure Setup Copy/Update	
School to Copy From	
Hope High School (High School)	
Select Modules to Copy/Update	Q
Modules □ ↔ Ø	
✓ Attendance	
Residence School Setup	
✓ Course	
✓ Discipline	
Fees	
🔽 Grading	
🔽 Groups	
Master Schedule	
✓ Parent Experience	
Select Schools to Copy To	Chooser 📀
X Line Organization Name	School Type
Kennedy High School	High School
2 King High School	High School

Running the School Setup Copy Process

NON-DISTRICT SCHOOLS

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

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

VNon-District Sc	hool			
Non-District School: Blalock	High School School Ty	pe: In-state K12 school		
Non-District School				
Non-District School		Filter Type		
Blalock High School			~	
School Info			٨	
Federal School Code	State School Code	School Type		
Fed	State	In-state K12 school	*	
Address Info			()	
Address				
Address 2				
City		State ZipCode	+4	
-		CA 🗸		
Province				
Country				
		~		
Phone Info			٥	
Phone	Alt. Phone			
Phone Type	Phone Type			
*	~			
Other Info				
Default Email Address				

Non-District School Screen

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

Student Course H	listory Ass	signment	t				«
Student Name: Abbott, Billy C.	School: Hope High S	chool Status: A	ctive Room Name: 231				
School Information	٢	Year Information	n	٢	Student Scho	ool Attended	٢
Add New Non-District School							٨
School Name (Required to add)	Filter Type		Federal School Code	State Sch	lool Code	School Type	
	Course History	*					*
Address		Address 2	2				
City		State	Zip Code +4	Phone	Ph	one Type	
			~			*	

Student Course History Assignment Screen

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

Chapter Four: STAFF AND USERS

This chapter covers:

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

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

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

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

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

STAFF SETUP

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

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

To modify a lookup table's values:

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

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

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

3. Click the **Add** button to add a new code.

Nam	Name: Position Status Namespace: K12.Staff Locked: N													
	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Co													
Lo	Lookup Values													
~	$\begin{array}{c c c c c c c c } \hline X & Line & ListOrder \Leftrightarrow & Code \Rightarrow & Code \Rightarrow & Description & \Leftrightarrow & Other & SiS \Leftrightarrow & State \Leftrightarrow & Att & Code \Rightarrow & C$													
\sim	× Line ListOrder ⊜		Code 😽	Description 🤿		Code 🔻	Code 3 🔻	SIF	Year Start ⊜	Year End €				
T 1 1 Tenured 1 V														
	2		2	Probationary		2			~	~				
	3		3	Long		3			~	~				
	4		4	Other		4			~	~				
				Desition Status La		Tabla								

Position Status Lookup Table

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

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

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

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

Nar	ne: S	taff Type 🛛	amespace: K12	Locked: N						
	Jse (Code as the S	State Code -	all values reported to state will be	used from	the lookup	code and	not evalua	te to the S	State Cod
Lo	okup	Values							Ac	ld 📀
	× Line				Other 🚔	State 🔥	Alt Code 3 😂	Alt Code 😂		itus
×	Line	ListOrder 🖨	Code 🄶	Description 🖨	Year Start ⊜	Year End €				
	1	0	С	Counselor					~	~
	2	0	М	Maintenance					~	~
	3	0	Т	Teacher					~	~

Staff Type Lookup Table

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

√Staff									
Staff Name: Ade	rson, Gordon Type:	Teacher							
General Scho	ols SpecialEd Em	nergency Credential	s						
Last Name	First Name	Middle Nam	e Suffix Geno	der Type	Open User Wir	ndow			
Aderson	Gordon	J	Male	Teacher	×				
Staff Info								Staff Role	
No Photo	Abbreviated Name	Nick Name		ty Number Badge Number	r Tea	acher / Admini	strator License Numb		
			123-45-6789	1000					
Edupoint	State ID				Те	acher / Admini	strator License Prefix	Confer	
							*	- Health	inc.
On file	Job Title	E-Mail 😥	a k12 ara					Rater	
	Dist: Data D	GAderson@ee							
	Birth Date B 01/12/1968	irth Month Birth Day	Birth Place	_					
	Highest Education L		o Degree Institution	Highest Degree Institut	ion				
	Bachelor's degree		e Degree institution						
	-								
Race and Ethnic	Resolved Race/Ethn	isity Tribal Commun	its a	1					۵
Non-Hispanic V			√						
	WINC								
Race⊡⇔⊵	_								
White		American C America	an Indian Islander - Hawaiian						
Asian - Chine Pacific Island		Other Pacific	Islander - Hawallan						
				<u></u>					
Home Address				Mail Address					(
Address				Address					
City	State ZIP Code	2 + 4		City	State Zip	Code + 4	_		
					~				
Map it!				Map it!					
Phone Numbers								Add	
X Line Pr	rimary 🔤	Туре	⇒ Phone	\ominus	Extension	\Leftrightarrow	Contact 😂	Not Listed	¢
1	Cell	~	623-555-4758	Í		Í			
Other Info				'					<u></u>
	e Current Exit Date	Exit Code 🕅 🕅	Exclude From State	Reporting 🔲 Do Not Disp	lav in ParentVUE				
07/27/2008		~							
	Status Default Job C	lass Default Assign	nent Type FTE	District Personnel					
Tenured	 Teacher (K12) 		✓ 1.00						
Experience Years In District			State Teaching	a Exporionco	~	oare Of Educa	ational Service		٥
0			State reaching	g Experience			alional Service		
·	strative Experience		State Administ	rative Experience			ative Experience		
Division Adminis	strative Experience		State Administ	rative Experience		otal Administre			
Ell Indicator	Longua	ge Of Instruction							
LII IIIuicatoi									
Default Support								Add	
X Line	1)pe			Support Type				Add	
				apport type					
Former Names	First Name	Mistal -	Nama Cuffin						(
Last Name	First Name	widdle	Name Suffix						
									-
Address History									٢
Employment His								Add	
X Line	Hire C	late	\Leftrightarrow	Exit Date	ę	€	Exit Code		\ominus
07/27/2	2008 🗊						~		

Staff Screen, General Tab

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

				icense Prefix Namespace: K12.Staff		the leakup	codo and	not ovalua	to to the G	State Code				
_	Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code Lookup Values Add													
×	Line	ListOrder 🔶	Code 🔶	Description 🔶	Other SIS ⊜	State Code ≑	Alt Code 3 🖨	Alt Code ⊜ SIF	Sta Year Start ⊖	tus Year ⊜ End ⇔				
	1	0	10	Special License					~	~				
		0	11	Vocational Evaluator License					~	~				
	3	0	3	Collegiate License					*	*				
	4	0	4	Normal Professional License					~	*				

Teacher Administrator License Prefix Table

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

		taff Educati Code as the S		amespace: K12 Locked: N all values reported to state will be (used from 1	the lookup	code and	not evalua	te to the	e State	Codi			
Loc	okup	Values								Add				
×	SIS Code Code 3 Code 3													
		Ě	, in the second se	· · · · · · · · · · · · · · · · · · ·	515	Coae ~	Code 3 ×	SIF	Start					
	1	1	1	Doctorate						~	~			
	2	2	2	Master's degree plus 30 or more ser					•	~	~			
	3	3	3	Master's degree						~	~			
		4	4	Bachelor's degree plus 30 or more s						~	~			
		5	5	Bachelor's degree						~	~			
		6	6	Less than bachelor's degree						~	~			
				Staff Education Leve	l Lookup	Table								

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

Nan	Name: Institution Namespace: K12.Staff Locked: N													
 	Jse C	ode as the S	State Code -	all values reported to state will b	e u	sed from	the lookup	code and	not evalua	te to the S	state Code			
Lo	okup	Values								Ad	d 🔇			
×	Line	ListOrder 🚔	Code 🚔	Description	Ş	Other SIS ≑	State Code ≑	Alt Code 3 🖨	Alt Code ⇔ SIF	Sta Year Start ⊖	tus Year ⊜ End ⊖			
	1	1	AK	Alaska						~	~			
	2	1	AL	Alabama						~	~			
	3	1	AR	Arkansas						~	~			
	4	1	AZ	Arizona						*	~			

Institution Lookup Table

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

	Alame: Tribal Community Namespace: K12.Demographics Locked: N Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code												
Lookup Values Add													
×	Line	ListOrder 🔶	Code 🔶	Description 🚔	Other SIS ⇔	State Code ≑	Alt Code 3 🖨	Alt Code ⊜ SIF	Sta Year Start ⊖	itus Year End ≑			
		0	F	Fort McDowell	F				~	~			
		0	1	Mesa In-town	1				~	~			
	3	0	S	Salt River Pima	S				~	~			

Tribal Community Lookup Table

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

Nar	ne: E	thnicity Nam	nespace: Revela	ation Locked: N										
	Jse C	Code as the S	tate Code -	all values reported to state will be	used from	the lookup	code and	not evaluat	te to the S	state Code				
Lo	Lookup Values													
					Other State	Alt	Alt		tus					
×	Line	ListOrder 🔶	Code 😂	Description 🔶		State Code ≑	Alt Code 3 🖨	Code ⊜ SIF	Year Start ⊜	Year End ⊖				
	1		01	White	1	W	W		~	~				
	2		02	African American	2	В	В		~	~				
	3		04	American Indian	4	А	AI		~	~				
	4		05	Asian - Chinese		A	A		*	~				
	5		11	Asian - Other		Α	Α		*	~				
	6		12	Pacific Islander - Hawaiian		A	Р		~	~				
	7		16	Pacific Islander - Other		A	Р		~	~				
				Ethnicity Look	T 11									

Ethnicity Lookup Table

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

		hone Type ode as the S			_ocked: N reported to state	will be (used fron	n the	lookup	code and	not evalua	te to the	State (Cod	
Loc	Lookup Values Add 🛇														
	V Line LintOrder A Cade A Description A Other State A Alt A Cade A											atus			
×	Line	e ListOrder ⇔ Code	Code 😂	Description	Description		SIS	Code		Code 3 🗢	Code ⊜ SIF	Year Start ⊜	Year End		
		0	С	Cell								~	Í	~	
		0	F	Fax								~		~	
		0	н	Home								*		*	
		0	М	Mobile								~		*	
		0	P	Pager								~		*	
		0	W	Work								~		~	

Phone Type Lookup Table

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

Nam	ie: P	osition Stati	US Namespac	e: K12.Staff Locked: N						
Πl	lse C	ode as the S	State Code -	all values reported to state will be	used from	the lookup	code and	not evalua	te to the S	State Coc
Loc	kup	Values							Ad	d 🔇
×	Line	ListOrder 🔶	Code 🔶	Description 🔶	Other SIS ≑	State Code 🔶	Alt Code 3 🖨	Alt Code SIF	Sta Year Start ⊖	
	1		1	Tenured		1			~	~
	2		2	Probationary		2			~	~
	3		3	Long		3			*	~
	4		4	Other		4			*	~

Position Status Lookup Table

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

Nar	ne: Je	b Class Na	mespace: K12.9	Staff Locked: N								
	Use C	ode as the S	tate Code -	all values reported to state will be	used fr	om	the lookup	code and	not evalua	te to the	State (Code
Lo	okup	Values								A	.dd	
					Other		State 🗻	Alt	Alt		atus	
 ^	Line	ListOrder 🔶	Code 🔶	Description 🖨	SIS		State Code 🔶	Alt Code 3 🖨	Code SIF	Year Start €	Year End	⊜
	1		10	Administrator (K12)			10			~	•	~
	2		11	Pupil service (K12)			11			~		~
	3		12	Teacher (K12)			12			~	•	~
	4		15	Administrator (Adult Ed)			15			~	•	~
	5		16	Pupil service (Adult Ed)			16			~	•	~
	6		17	Teacher (Adult Ed)			17			~	•	~
	7		19	Clerical			19			~	•	~
	8		23	Paraprofessional			23			~		~
	9		24	Other classified staff			24			~	2	~

Job Class Lookup Table

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

-00	kup	Values							Ad	ld (
					Other 👝	State 🛆	Olf .	Alt	Sta	ntus
×	Line	ListOrder 🔶	Code 🄤	Description 🔶	Other SIS ≑	State Code ≑	Alt Code 3 🖨	Code ≑ SIF	Year Start ⊜	Year End
	1		1001	Grade 1		1001			~	
			1002	Grade 2		1002			~	
			1003	Grade 3		1003			~	
			1004	Grade 4		1004			*	
			1005	Grade 5		1005			~	
			1006	Grade 6		1006			~	
			1007	Grade 7		1007			~	
			1008	Grade 8		1008			~	
			1009	Combination class (K - 3)		1009			~	
			1010	Combination class (4 - 8)		1010			~	
			1012	Combination class (3 - 4)		1012			~	
			2100	Reading improvement/developmental		2100	Х		~	
			2101	Comprehensive English		2101			~	
			2102	Basic English/Language Art (Proficie		2102	Х		~	

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

Name: Ell Indicator Namespace: K12.Courseinfo Locked: N Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code												
Loc	okup	Values							Ad	d 🔇		
	X Line ListOrder ⇒ Code ⇒ Description ⇒ Other ⇒ State ⇒ Code ⇒ Alt ⇒ Code ⇒ Year → Year →											
	Line	ListOrder 👳	Code 👳	Description 🤿	sis 🔻	Code 🔻	Code 3 🔻	Code ⇒ SIF	Year Start ⊜	Year End €		
	1		1	Primary language		1			~	*		
	2		2	ELD only		2			*	*		
	3		3	SDAIE only		3			~	~		
	- 4		4	ELD and SDAIE		4			~	~		

ELL Indicator Lookup Table

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

Ν	lam	e: S	upport Type	Namespace:	K12.Staff Locked: N						
I	U	ise C	Code as the S	State Code -	all values reported to state will be	used from	the lookup	code and	not evalua	te to the S	State Code
	Loo	Lookup Values Add									
Γ	X Line ListOrder ⇔ Code ↓ Description ⇔ Other SIS ⊕ Alt Code ↓ Alt Code ↓ ↓ Year										tus
	^	Line	ListOrder 🔶	Code 🄤	Description 🔶	Other SIS 🔤	Code 🗟	Code 3 🗮	Code ⇒ SIF	Year Start ⊜	Year End €
		1	1	1	Superintendent		0100			~	~
		2 2 2 Counselor 0400 🔍									

Support Type Lookup Table

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

Na	me	e: S	taff Exit Coo	le Namespace	e: K12.Staff Locked: N						
	U	se C	ode as the S	State Code -	all values reported to state will be u	used from t	the lookup	code and	not evalua	te to the S	state Code
Lo	ookup Values Add 📀										
	X Line ListOrder Code Q Description \ominus Other \ominus State \ominus Alt $Code \ 3$ \ominus Code \ominus \frown <t< td=""><td>Sta</td><td></td></t<>								Sta		
×	ľ	Line	ListOrder 🔶	Code 🔶	Description 🔶	Other SIS ⊜	Code 🗟	Code 3 🗟	Code ⊜ SIF	Year Start ⊖	Year End ⊜
	1	1	0	1	Left state					~	~
2 1 2 Took non-teaching position in district						~	*				

Staff Exit Code Lookup Table

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

√Staff								(«
Staff Name: User, T	eacher Type: Teacher							
General Schools	SpecialEd Emergen	cy Credentials						
Last Name	First Name	Middle Name	Suffix	Gender	Туре			
User	Teacher			Female	🔽 Teacher	~		
🗖 Assign To District	t Show His	story						
Staff School Assign	ments							Show Detail 🔇
X Line Year	School 🔶	Old SIS Number	🔶 Ho	me Room 👙	Department	⇔	Job Class	🔶 FTE 🔤
1 2010-201	1 Hope High School		+			*	•	*
-		Cabaala	Tab Ota	ff Saraan				

Schools Tab, Staff Screen

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

– L	Jse C	-		2.CourseInfo Locked: N all values reported to state will be	used from	the lookup	code and	not evalua	te to tł	ne Si Ado	 od
		ListOrder 🔶	Code 😂	Description 🔶	Other SIS	State Code ≑	Alt Code 3 😂	Alt Code \$ SIF	Year Start	Stat	\$
	1	0	FA	Fine Arts						~	~
	2	0	LA	Language						~	~
	3	0	MA	Math						~	~
Γ	4	0	SC	Science						~	~
Γ	5	0	SE	Special Education						~	~
	6	1	AR	Art						~	~
	7	2	AS	Aerospace Science						~	~
	8	3	AG	Agricultural Science						~	~
	9	4	BE	Business Education						~	~
	10	5	СВ	Computer/Business						~	~

Department Lookup Table

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

Nar	ne: J	ob Class Na	amespace: K12.9	Staff Locked: N						
	Use (Code as the S	State Code -	all values reported to state will be	used from	the lookup	code and	not evalua	te to the S	State Code
Lo	okup	Values							Ad	d 🔇
~				Description 🔶	Other 🝦	State	Alt	Alt	Sta	
×	Line	ListOrder 👄	Code 🔶	Description 🖨	sis 🔻	Code 🔻	Alt Code 3 🔤	Code SIF	Year Start ⊖	Year End ⊜
			10	Administrator (K12)		10			~	~
	2		11	Pupil service (K12)		11			*	*
	3		12	Teacher (K12)		12			~	~
	4		15	Administrator (Adult Ed)		15			*	~
	5		16	Pupil service (Adult Ed)		16			*	*
	6		17	Teacher (Adult Ed)		17			~	~
	7		19	Clerical		19			*	*
	8		23	Paraprofessional		23			~	~
	9		24	Other classified staff		24			~	~
	<i>.</i>			Ich Class Look	un Tahl	-				

Job Class Lookup Table

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

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

√Staff									«
Staff Name: Aderson,	, Gordon Type: Teacher								
General Schools	SpecialEd Emergency	Credentials							
Last Name	First Name	Middle Name	Suffix G	ender	Туре		pen User Window		
Aderson	Gordon			/lale 🔽 🔽	Teacher	×	,		
Emergency Contacts								Add	
× Line Relationship :			Home	W	ork		Other		
X Line Relationship :	⇒ Name	Phone	😂 Extn 🗧	Phone	Extn	Phone	🔶 Extn 🍣	Туре	\ominus
1 Friend	Derrick Madson	213-555-84	76					Cell	~
		Emoro	anov Tah	Stoff So	roon		· · · ·		

Emergency Tab, Staff Screen

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

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

√Staff						4
Staff Name: User, Teacher Type: Tea	cher					
General Schools SpecialEd Em Last Name First Name	ergency Credentials Middle Name St	uffix Gender	Turne			
User Teacher			Type Teacher	~		
Teacher Credentials					Add	٥
🗙 Line Teaching Area 🚔	Credential Type	🚖 🛛 Date E	arned 🔶	Docum	ient Number	
🗖 🚺 Adult Ed 🔽 Full	credential 🛛 👻	06/15/1992		13459872		
ELL Authorization					Add	0
X Line Ell Aut Date	\ominus		Ell Aut Type			♦
07/25/2005	Authori	zed teacher 🛛 👻				
Highly Qualified - By Course			_	Add	Chooser] 🔕
X Line Course ID And Title			Qual Me	thod		⊜
SS03A - Survival Skills +		Yes, using HOUSSE	*			
2 SS03B - Soc Skills		Yes, using HOUSSE	*			
SS03C - Soc Studies		Yes, using HOUSSE	~			
Additional Job Classes				Add	Show Detail] 🔕
🗙 Line Start Date 🔶	End Date 😝	Job Class	⊜ Fte	⊖	Organization	⊜
08/10/2009		Teacher (K12 🔽		Kenr	nedy Higł 🔽	

Staff Screen, Credentials Tab

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

		-		space: K12.Staff Locked: N all values reported to state will be	used f	rom	the lookup	code and	not evaluai	te to tr	ne S	State C	cod
Lo	okup	Values									Ad	d	٢
					Othe		State 👝	Alt	Alt		Sta		
×	Line	ListOrder 👄	Code 🔤	Description 🗧	SIS		State Code ≑	Alt Code 3 🖨	Code 🔶 SIF	Year Start	⊜	Year End	\Rightarrow
	1		01	Elementary self-contained			01				~		~
	2		02	Special Ed			02				~		~
	3		03	Reading			03				*		~
	4		07	Adult Ed			07				*		~
	5		08	Special designated subjects			08				*		~
	6		11	Agriculture			11				~		~
	7		14	English			14				~		~
	8		15	Foreign language			15				~		~

Aut Teaching Area Lookup Table

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

Name: Cred Type Namespace: K12.Staff Locked: N										
Lookup Values Add										
			Other 👝	State 👝	Alt o	Alt	Sta	tus		
X Line ListOrder ⊜	Code 🄶	Description 🖨	Other SIS ⊖	State Code ≑	Alt Code 3 🖨	Code ≑ SIF	Year Start ⊜	Year End ⊜		
1	01	Full credential		01			~	~		
2	02	University internship		02			*	~		
🗖 З	03	District internship		03			~	~		
4	04	Pre-intern		04			~	~		
 5	05	Emergency permit		05			*	~		
[] 6	06	Waiver		06			~	~		
I 7	07	Multiple subject		07			~	~		

Cred Type Lookup Table

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

Name: Ell Auth Type Namespace: K12.Staff Locked: N Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code													
Lookup Values Add 🔾										é) t			
					6	Other		State	011 .	Alt	Status		
×	Line	ListOrder 🔶	Code 🄶	Description 🗧		Other SIS		Code 🕀	Alt Code 3 👄	Alt Code 🔶 SIF	Year Start	⊜	Year End ⊜
	1		1	Authorized teacher				1				*	*
	2		2	Teacher in training				2				~	*
	3		3	Bilingual paraprofessional				3				*	*

ELL Auth Type Lookup Table

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

Name: Qual Method Namespace: K12.Staff Locked: N											
Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State Code											
Lookup Values Add 🔇											
			~		Other State	State 🔥	Alt	Alt Code 🔶	Status		
×	Line	ListOrder 🖨	Code 🔶	Description 🔶	Other SIS ≑	Code 🗟	Alt Code 3 🖨	Code	Year Start ⊜	Year End ⊜	
	1		Н	Yes, using HOUSSE		Н			~	*	
	2		N	No		N			~	~	
	3		Y	Yes, other than HOUSSE		Y			*	*	

Qual Method Lookup Table

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

	ob Class Na	mespace: K12.9	Staff Locked: N							
se C	ode as the S	itate Code -	all values reported to state will be (used from	the lookup	code and	not evalua	te to the S	State Coo	
Lookup Values Add 🤇										
				Other 🔺	State 🔺	Alt 👝	Alt	Status		
_ine	ListOrder 🗟	Code 😽	Description 😽	sis 🔻	Code 🔻	Code 3 👼	Code ⇒ SIF	Year Start ⊜	Year End 🖨	
1		10	Administrator (K12)		10			~	~	
2		11	Pupil service (K12)		11			~	~	
3		12	Teacher (K12)		12			~	~	
4		15	Administrator (Adult Ed)		15			~	~	
5		16	Pupil service (Adult Ed)		16			*	~	
6		17	Teacher (Adult Ed)		17			~	~	
7		19	Clerical		19			*	~	
8		23	Paraprofessional		23			~	~	
9		24	Other classified staff		24			*	~	
	kup	kup Values	kup Values ListOrder ⇒ Code ⇒ 1 10 2 11 3 12 4 15 5 16 6 17 7 19 8 23	Administrator (K12) Interstand Description 1 10 Administrator (K12) 2 11 Pupil service (K12) 3 12 Teacher (K12) 4 15 Administrator (Adult Ed) 5 16 Pupil service (Adult Ed) 6 17 Teacher (Adult Ed) 7 19 Clerical 8 23 Paraprofessional 9 24 Other classified staff	Automatical Structures Interstand Structures ListOrder ⇒ Code ⇒ Description Other SIS 1 10 Administrator (K12) 1 2 11 Pupil service (K12) 1 3 12 Teacher (K12) 1 4 15 Administrator (Adult Ed) 1 5 16 Pupil service (Adult Ed) 1 6 17 Teacher (Adult Ed) 1 7 19 Clerical 1 8 23 Paraprofessional 1	Notice State ListOrder ⇒ Code ⇒ Description Other SIS State ⇒ 1 10 Administrator (K12) 10 10 2 11 Pupil service (K12) 11 11 3 12 Teacher (K12) 12 12 4 15 Administrator (Adult Ed) 15 16 5 16 Pupil service (Adult Ed) 16 17 6 17 Teacher (Adult Ed) 17 19 8 23 Paraprofessional 23 23 9 24 Other classified staff 24	Note of the problem of	kup Values ListOrder (ListOrder Code (Code	ListOrderCodeDescriptionOther SISState CodeAtt CodeAtt CodeState Year State110Administrator (K12)10 \checkmark 211Pupil service (K12)11 \checkmark \checkmark 312Teacher (K12)12 \checkmark \checkmark 415Administrator (Adult Ed)15 \checkmark \checkmark 516Pupil service (Adult Ed)16 \checkmark \checkmark 617Teacher (Adult Ed)17 \checkmark \checkmark 719Clerical19 \checkmark \checkmark 823Paraprofessional23 \checkmark \checkmark 924Other classified staff24 \checkmark \checkmark	

Job Class Lookup Table

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

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

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

♥District Setup			
District Setup			
Options System Grade Setup To	eacherVUE Labels Auto-Sequence Reports	Waivers Mobile Apps	
Enrollment Options			0
Address Options			0
Bulk Mailing			0
Grading Setup			0
Audit Class Options			0
Other Options			(
Discipline Type	Incident Violation Display	District Group History Filter	
Incident 💌	Entire Violation		~
Student Notification	Badge Number Update Type		
Icon 👻	Manual override of badge number 🛛 👻		
Disable Unique State Number	Adult ID Update Type		
Allow Negative Seat Totals	✓		
Enable Announcement Dismissal	Fee Total Type		
	Include fees for all organizations and all years		
Enable historical tracking of staff in	n sections		
Auto Assign District Staff To School	ols		
Validate Student Classes			
Show Warning and Allow Data to be Sav	ved if Student Classes Overlap		

District Setup Screen, System Tab

ADDING NEW STAFF

To add new staff to Synergy SIS:

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

Menu 🗸 🔇 🔇) 😽 Find	Undd Add De	ete			St	atus: Fir	d 🕲 🖓 🚱
VStaff								~
Staff Name: Type	e:							
General Schoo		nergency Credentials						
Last Name	First Name	Middle Name	Suffix Gender	Type	Open User Win	dow		
Staff Info							0	Staff Role 🔇 🥥
No Photo	Abbreviated Name	Nick Name	Social Security N	lumber Badge Nun	iber State ID	Teacher / Administrator License Nun	iber	Role Type
Edupoint	Job Title	E-Mail 😥				Teacher / Administrator License Pre	fix •	Conference
On file	Birth Date B	iirth Month Birth Day E	irth Place	_				☐ Health ☐ Rater
	Highest Education L	evel Baccalaureate	Degree Institution	Highest Degree Ins	titution 🗸			
				Staff Screer	<u> </u>			

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

0	Find Close Assign	Form Status: Read	y
1			-
	StaffFind		
	Assign To School		1
	×		
I	Selection Criteria (Searching Student Information System)	(5
	Last Name First Name Gender	Badge Num	
	User Teacher Female 🗸		
٦	Find Staffs		Ī
	Staffs	()	ĩ
	Line Staff Name	Gender BadgeNum	l
1			1

StaffFind Screen

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

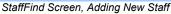
This function can also be used to add staff to new schools and new school years, or to assign staff members who have been converted from a previous SIS system. For more information about the assignment function, see the section in this chapter on Assigning Existing Staff to Schools.

Find Close Ass	ign Add New				Form	Status: Ready (Update Mode)
StaffFind						
Assign To School						
	~					
Selection Criteria (Sea	rching Student Inform	ation System)			<u></u>
Last Name	First Name	Gender	Badge Nur	1		
User	Teacher	Female	▼			
Find Staffs						
Staffs						<u>()</u>
Line Staff Name				Gender	BadgeNum	
1 User, Teacher				Female	4	
			01.0			

Staff Find Results

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





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

Save Close									
Staff	·								
General									
Last Name User	First Name Teacher	Middle Na	ame Suffix	Gender	Туре	Assign To So		~	
				Female	Y Teacher	✓ Hope High Sc	nooi	*	
User Add Inform		ed at the same time	the Staff record	is being add	ed then these 4	fields are mandat	ory fields. If the fields are	a left blank then or	alv the Staff
record will be cr	eated.	ed at the same time	The Stan record	is being add	eu men mese 4	neius are manuali	ory neids. If the neids are	e leit blank then of	ily the Stan
User Name	Password	Confir	m Password	Email		_			
Staff Info									Staff Role 🔇
No Photo	Abbreviated Name	Nick Name	Social Se	curity Numbe	er Badge Numbe	er State ID	Teacher / Administrator	License Number	Role Type
Estimated	Job Title	E-Mail 😥					Teacher / Administrator	Lisopoo Drofiv	
Edupoint	JOD THE						Teacher / Auministrator		Discipline
On file	Birth Date B	Birth Month Birth Da	y Birth Place						Health
0111110									Rater
	Highest Education L		te Degree Institu		st Degree Institu				
		~		*		~			
Race and Ethnic									۵
Hispanic/Latino	Resolved Race/Ethn	nicity Tribal Commu	nity						
Race ⊖ ↔ 🕑	- African		an Indian						
Asian - Chine		American C Americ	: Islander - Hawa	iian					
Pacific Island									
Home Address					Mail Addres	SS			 ©
Address					Address				
City	State ZIP Code	e +4			City		ip Code + 4		
	~					~			
Map it!					Map it!				
Phone Numbers	i i								Add 🔇
X Line	Primary 🚔	Э Туре	Phone	; ⇔	Extensi	ion 🔶	Contact	Not Lis	sted 🚔
Other Info									٥
	te Current Exit Date		Exclude From S	tate Reportin	g 📄 Do Not Dis	play in ParentVUE			
		~							
Default Position	Status Default Job C	lass Default Assign	ment Type FTE	Dis	trict Personnel				
			• 1.0						
Experience Years In District			State Tea	ching Experi	0000		Years Of Educational	Sonviso	
rears in District			State Tea	iching Experi	ence			Service	
Division Adminis	strative Experience		State Adn	ninistrative E	perience		Total Administrative Ex	perience	
					'				
Ell Indicator	Langua	age Of Instruction							
	~	*							
Default Support	Туре								Add 🔇
X Line					Support Type				¢
Former Names									۵
Last Name	First Name	Middl	e Name Suffix						
Address History									
Employment His									Add 🔇
🗙 Line	Hire	Date	\Leftrightarrow		Exit Date			Exit Code	

Staff Screen, Adding

- 4. Complete the staff record. The appropriate content for many fields birth date, home address, and so on is clear. The following might need some explanation.
 - Type is a district-specific lookup that can indicate the category of staff.
 - Assign to School is not needed if focused to a school, as the staff will be assigned to that school. If focused tot the district, either select a school or assign this person to the district by checking the District Personnel box in the Other Info section.
 - Abbreviated Name is a shortened name used in some reports.

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

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

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

To view and modify school assignment information:

1. Click the Schools tab of the Staff screen.

√Staff						(«						
Staff Name: User, Teacher Type: Teacher												
General Schools S	pecialEd Emergency	Credentials										
Last Name	First Name N	liddle Name Suffix	Gender Ty	ре								
User	Teacher		Female 🔽 Te	acher 💌								
🗖 Assign To District	Assign To District Hide History											
Staff School Assignme	nts					Show Detail 🔕						
X Line Year	School 🔶	Old SIS Number	🔶 🛛 Home Room	🔶 Department	rightarrow Job Class	🔶 FTE 🔶						
1 2010-2011	Hope High School		+	~	*							
2 2009-2010	Hope High School		+	~	~							
		Cabaala	Tab Staff Care									

Schools Tab, Staff Screen

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

Find Close Select	Clear Selection	
Find: School I	Room	
Find Criteria		
Room Name	School Year	
	2009	
Search Results		•
Find Result		(
Line Room Name		School Year
1 0002		2009
2 0003		2009
3 0005		2009
4 0007		2009
5 0008		2009
6 0009		2009
	Find: School	Room Screen

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

Find Close Sel		
Find Criteria		
Room Name	School Year 2009	_
Search Results		
Line Room Name		School Year
2 0003		2009
3 0005 4 0007 5 0008		2009 2009 2009 2009
6 0009		2009

Find: School Room Screen, Selecting

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

Menu 🕶 🔇 🏈 🔌	Save Undo	Add Delete			Status: Ready	2 R 🔊
√Staff						«
Staff Name: User, Tea	cher Type: Teacher					
General Schools S	SpecialEd Emergency	Credentials				
Last Name	First Name	Middle Name Suffix	Gender Type			
User	Teacher		🛛 Female 🛛 👻 Teacher	¥		
E Assign To District	Hide H	story				
Staff School Assignme	ents					Show Detail 🔇
X Line Year	School 🔶	Old SIS Number	🗧 🛛 Home Room 🚔	Department 🔶	Job Class 🛛 🍦	FTE 🔶
1 2010-2011	Hope High School		0003←	*	~	
2 2009-2010	Hope High School		+	~	~	

Schools Tab, Staff Screen, Saving Home Room

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

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

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

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

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

√Staff															«
taff Name: User, Teacher Type: Teacher															
General Schoo	ls SpecialEd	Emergency	Credentials												
Last Name	First N	ame	Middle Name	Suffix	Gender	Тγ	/pe								
User	Teache	er			Female	💌 Te	eacher	~							
Emergency Cont	acts													Add	
X Line Re	lationship	🔶 Name		Home			Work					Other			
	rationsnip	⇒ Name	Pho	ne 🔶	Extn 🔶	Phone	Ş	Extn	⊜ P	hone	\Rightarrow	Extn	Ş	Туре	Ş
					ov Toh	Ctoff C									

Emergency Tab, Staff Screen

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

√Staff									
Staff Name: User, Teache	t Type: Teacher								
General Schools Spec	cialEd Emergency Crea	entials							
Last Name F	irst Name Middle	Name Suffix	Gender	Туре					
User	Teacher 🛛		Female	😽 Teacher	~				
Emergency Contacts								Add	
🗙 Line Relationship 🔶	Name 🖨	Home		Work			Other		
	ndille 🗢	Phone 🔶	Extn ಿ	Phone 🔶	Extn ಿ	Phone	🔶 Extn 🔶	Туре	\bigcirc
									~

Emergency Tab, Staff Screen, Adding

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

√Staff												(«	
Staff Name: User, Teac	aff Name: User, Teacher Type: Teacher												
General Schools S	ecialEd Emergency	Crede	entials										
Last Name	First Name	Middle	Name	Suffix	Gender		Туре						
User	Teacher				Female	~	Teacher	*					
Emergency Contacts											Add		
× Line Relationship	⇒ Name	¢		Home			Work			Other			
	→ Name	$\overline{}$	Phor	ie 🍦	Extn 🈂	Pho	ne 🍦	Extn 🈂	Phone	🔶 Extn 🔶	Туре	\bigcirc	
🔲 1 Husband	Fred		800-555-1	1212					800-555-1111		Cell	*	

FSaving the Emergency Contact information

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

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

√Staff					
Staff Name: User, Teacher Type: Teacher					
General Schools SpecialEd Emergenc	Credentials				
_ast Name First Name	Middle Name Suffix	Gender	Туре		
User Teacher		Female	Teacher	×	
Teacher Credentials					Add
🗙 🛛 Line 🛛 🛛 Teaching Area 🔶	Credential Type	\Leftrightarrow	Date Earned	\	Document Number 🛛 😂
ELL Authorization					Add 🔇
🗙 🛛 Line 🛛 🛛 Ell Au	t Date	\ominus		Ell Aut Ty	npe 🔶
Highly Qualified - By Course					Add Chooser 🔇
X Line Course ID And Title				Qual N	lethod 🔶
Additional Job Classes					Add Show Detail 🔕
🗙 🛛 Line 🛛 Start Date 🛛 😂	End Date 🔶	Job Clas	s 🔶	Fte 🔶	Organization 🔶

Credentials Tab, Staff Screen

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

√Staff										
Staff Name: User	r, Teacher Type: Teacher									
General Schoo	ls SpecialEd Emerger	cy Credentials								
Last Name	First Name	Middle Name	Suffix	Gender	Туре					
User	Teacher			Female	 Teacher 	~				
Teacher Creden	tials								Add	
X Line T	eaching Area 🛛 😂	Credent	ial Type	e e	Date E	arned	<u>A</u>	Document N	umber	4
1	~		*			P				
ELL Authorizatio	in								Add	•
X Line	EII /	ut Date		$\stackrel{\bigtriangleup}{\bigtriangledown}$			Ell Aut Type	e		
Highly Qualified	- By Course							Add	Choose	r (
X Line Course	ID And Title						Qual Me	thod		
Additional Job C	lasses							Add	Show Det	ail (
X Line	Start Date 🔶	End Date	Ş	Job Cla	ss	🔶 Ft	:	Organiz	ation	
			Addin	q Credent	als					

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

√Staff									(0
Staff Name: User, *	Teacher Type: Teacher								
General Schools	SpecialEd Emergend	y Credentials							
Last Name	First Name	Middle Name Su	uffix Gender	Туре					
User	Teacher		Female	🔽 Teacher	~				
Teacher Credentia	ils							Add	
🗙 Line Tea	ching Area 🛛 🍦	Credential T	ype	🔶 🛛 Date	Earned	\ominus	Document Num	ber	¢
Adult Ed	Y Full o	redential	*	06/15/1992		13458872			
ELL Authorization								Add	
X Line	Ell Aut Date	A			Ell Au	t Type			
1				*					
Highly Qualified -	By Course						Add	Chooser	
🗙 🛛 Line Course ID	And Title					Qual Metho	d		Ş
Additional Job Cla	ISSES						Add	Show Detai	I 📀
X Line	Start Date 🔶	End Date	€J	ob Class	🔶 Ft	e 🔶	Organizatio	n	Ş

Adding an ELL Authorization

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

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

√Staff							(«
Staff Name: User,	, Teacher Type: Te	eacher					
General School		mergency Credential	s				
Last Name	First Name	Middle Name	e Suffix G	ender T	уре		
User	Teacher		F	emale 🔽 T	eacher 🔽		
Teacher Credent	ials						Add 🔇
X Line Te	aching Area 🛛 🍦	Crede	ntial Type	Ş	Date Earned	\Leftrightarrow	Document Number 🛛 🔶
🔲 1 Adult E	d 💙	Full credential	*	06/15	5/1992 📝	1345887	2
ELL Authorization	n						Add 🔇
X Line	Ell Aut	t Date	∂		Ell	Aut Type	\ominus
1 07/25/2	05 📝		Authorize	d teacher	~		
Highly Qualified	- By Course						Add Chooser
X Line Course I	D And Title					Qual Metho	u
Additional Job C	lasses						Add Show Detail 🔕
X Line	Start Date	😂 🛛 End Date	\Rightarrow	Job Class	$\stackrel{\bigtriangleup}{\bigtriangledown}$	Fte 🔤	Organization 🔶
				0 110 10			

Adding Highly Qualified Courses

- 7. To add a single course:
 - a. Click the Add button. The Find: Course screen opens.
 - b. Enter all or part of the **Course ID** and/or **Course Title** and click the **Find** button at the top of the screen. Courses that match the criteria are listed in the **Find Result** grid.

Find Close	Select Clear Selection	
Find: Cour	rse	
Find Criteria		
Course ID	Course Title	
ssO		
Search Results		
Find Result		6
Line Course ID		Course Title
1 SS03A		Survival Skills
2 SS03B		Soc Skills
3 SS03C		Soc Studies
4 SS03C1		Social Studies
5 SS03C2		Social Studies
6 SS03D		Recr/leisure
0 33030		Find Courses Sereen

Find Course Screen

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

Find Close Select	Clear Selection	
Find: Course		
Find Criteria		
Course ID	Course Title	
ssO		
Search Results		
Find Result		Q
Line Course ID		Course Title
1 SS03A		Survival Skills
2 SSU3B		SOC SKIIIS
3 SS03C		Soc Studies
4 SS03C1		Social Studies
5 SS03C2		Social Studies
6 SS03D		Recr/leisure
		Selecting the Course

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

√Staff											
Staff Name: User, Tea	acher Type: Tea	cher									
General Schools	SpecialEd Em	ergency Credentials									
Last Name	First Name	Middle Name	Suffix	Gender	Туре						
User	Teacher			Female	Veacher 🛛	~					
Teacher Credentials										Add	
🗙 Line Teachi	ng Area 🛛 🔶	Credenti	al Type		🗦 🛛 Date E	arned	⇔	Da	ocument Nu	mber	¢
Adult Ed	*	Full credential	*		06/15/1992		13	458872			
ELL Authorization										Add	
X Line	Ell Aut D	ate	\Leftrightarrow			Ell Au	rt Type				¢
07/25/2005	P		Authoria	zed teacher	*						
Highly Qualified - By	Course								Add	Chooser	· 🔇
🗙 🛛 Line Course ID An	d Title						Qual Metho	d			¢
1 <u>SS03A - Su</u>	rvival Skills			Yes, usi	ng HOUSSE	*					
Additional Job Classe	S								Add	Show Deta	ail 🕥
X Line Sta	art Date	⇒ End Date	\bigcirc	Job	Class	⊜ F	te 👙		Organiza	tion	\Leftrightarrow

Added Course

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

Find Select					
Chooser					
Find Criteria					
Course ID	Course Title				
		Add Selected Row(s) >	Add All Row(s) >>		
Search Results				_	
Find Result		۵	Selected Items		٨
Line Course ID	Course Title		X Line Course ID	Course Title	
1 SS03A	Survival Skills				
2 SS03B	Soc Skills				
3 SS03C	Soc Studies				
4 SS03C1	Social Studies				

Finding Courses Using the Chooser Screen

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

Find Select								
Chooser								
Find Criteria								
Course ID	Course Title							
	_						-	
, 		r		-				
		Add Selected Row(s)	>		Add A	Row(s) >>		
Search Results							_	
Find Result		۵	- 1	Sel	ected	ltems		٨
Line Course ID	Course Title		- 1	X	Line	Course ID	Course Title	
1 SS03A	Survival Skills		- 1		1	SS03B	Soc Skills	
2 SS03C1	Social Studies		- 1		2	SS03C	Soc Studies	
3 SS03C2	Social Studies		. L		-	00000	ooc oldaloo	
	Selectii	ng Courses Us	sing	the	Ch	ooser Sci	reen	

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

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

												_
Staff Name: User, Te	acher Typ	e: Teacher										
General Schools	SpecialEd	Emergency	Credentials									
_ast Name	First Na	ame	Middle Name	Suffix	Gender	Туре						
User	Teache	r			Female	👻 Teacher	~					
Teacher Credentials	:										Add	Ç
X Line Teacl	iing Area	∂	Credenti	ial Type		⇒ Date	Earned	Ş		Document N	lumber	
Adult Ed	~	Full cre	dential	~		06/15/1992	P		13458872			
ELL Authorization											Add	•
× Line	EI	Aut Date		∂			EII A	ut Type				Ę
07/25/2005	P			Auth	orized teache	r 🗸						
Highly Qualified - B	/ Course									Add	Choose	er 🕻
× Line Course ID A								Qual Met	hod		.,	4
T 1 SS03A - S	urvival Skills	÷			Yes, us	ing HOUSSE	~					
2 SS03B - S	oc Skills 🔶	-			Yes, us	ing HOUSSE	~					
E 3 SS03C - S	oc Studies	-				ing HOUSSE	*					
Additional Job Class	205					-				Add	Show Det	tail 🖉
	00									Add	Onow Del	2000

Courses Added Using the Chooser Screen

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

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

A new blank line appears in the section.

♥Sta	ff														<
Staff Nam	e: User, Tea	acher Type	Teacher												
General	Schools	SpecialEd	Emergency	Credentials											
Last Nam	e	First Na	me	Middle Name	Suffix	Gender	Т	уре							
User		Teacher				Female	٦ 💌	Feacher	~						
Teacher	Credentials												A	dd	0
X Line	Teachi	ng Area	♦	Credenti	ial Type		Ş	Date E	arned	Ş		Document	Number		⊜
1	Adult Ed	*	Full cree	dential	*		06/1	5/1992			13458872				
ELL Auth	orization												A	dd	
X Line			Aut Date		\$				EII A	ut Type					♦
1	07/25/2005	P			Auth	norized teacl	her	*							
Highly Q	ualified - By	Course										Add	Ch	ooser	0
X Line	Course ID An	d Title								Qual Met	thod				♦
1	<u>SS03A - Su</u>	rvival Skills	(Yes,	using HOU	SSE	*						
2	<u>SS03B - So</u>	c Skills 🗲				Yes,	using HOU	SSE	*						
3	<u>SS03C - So</u>	ic Studies 🔶				Yes,	using HOU	SSE	*			_			
Addition	al Job Classe	s									(Add	hov	/ Detail	0
X Line	Sta	art Date	\	End Date		\$	Job Clas	ss	Ş	Fte	Ş	Or	ganization		¢
1		P					*						*		
					Addi	tional Jo	b Clas	s							

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

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

∀Staff										(
Staff Name: User,	Teacher Type: Teacher									
General Schools	SpecialEd Emergency	Credentials								
Last Name	First Name	Middle Name		ender	Туре					
User	Teacher	J	Fe	emale	Teacher	~				
Teacher Credenti	als								Add	
🗙 Line Tea	aching Area 🛛 🔶	Credenti	al Type	Ş	Date	Earned	\Leftrightarrow	Document N	umber	
🔲 1 Adult Ed	Y Full cr	edential	*		06/15/1992		13458872	2		
ELL Authorization									Add	
× Line	Ell Aut Date		\ominus			EII A	lut Type			Ð
07/25/20	05 📝		Authorize	d teacher	*					
Highly Qualified -	By Course							Add	Chooser	
🗙 🛛 Line Course II) And Title						Qual Method			Ş
1 <u>SS03C</u>	Soc Studies			Yes, using l	HOUSSE	*				
2 <u>SS03A -</u>	Survival Skills			Yes, using l	HOUSSE	*				
🔲 3 <u>SS03B -</u>	Soc Skills			Yes, using l	HOUSSE	*				
Additional Job Cla	isses							Add	Hide Detai	I 🔇
Line	Start Date	Start Date	End Date		Class	Fte	Organizatio	n		
1 08/10/2009	P	08/10/2009		📝 Tea	acher (Adul 🗸	0.25	Kennedy Hig	h School	*	
		Default Supp	ort Type						Add	0
		X Line				Support T	Type			¢

Detail View of Additional Job Classes

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

COMBINING AND CLEANING STAFF RECORDS

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

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

🗐 S	Synergy Generic Conversion					
<u>File</u>	Tools	Help				
-W	Upd	late Rooms				
	Upd	late Grid Code				
	Con	bine and Clean Parents				
1	Con	nbine and Clean Staff				
	Upd	ate SIS Number AutoSequence				
	Clea	an Hispanic Ethnic Codes				
G	Con	vert Discipline to Incident Discipline				
1	Exp	ort PAD/BO Security Groups and Settings				
-	Scra	amble Data				
Sta	Add	Import Definitions to Database				

Synergy Generic Conversion Tool, Tools menu

3. A confirmation screen appears.

Confirm	Combine and Clean Staff Data	×
?	WARNING: Running this process will do the following: All staff in all years with matching badge numbers will be combined into one staff record. Any staff records tied to a user will NOT b processed.)e
	OK to continue?	
	OK Cancel	

Combine and Clean Staff Data confirmation message

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

ASSIGNING EXISTING STAFF TO SCHOOLS

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

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

To change the focus:

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

		Edupoint	Hope High School Year2011-2012 UserAdmin User Show active and ignoring
🖅 🗐 🖉 🏠 Quick Launch	R.		Lock Sign Out Support Help
		Focus	

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

Save Undo		
Select Focus		
Select Focus Year and Inclu	de Inactives	()
Focus Year 2009-2010 💌	Show Inactive Students Active And Inactive	
User Configuration Select Focus Organization:		<u></u>
 Edupoint School District 1. Elementary Schools 2. Middle Schools 3. High Schools Hope High School Kennedy High School King High School 4. Special Schools 		
	Select Focus Screen	

3. Click the Save button

To change a staff assignment to a school:

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

Menur 🔍 🔍 🛞 🛛 Find Undo 🗛 Delete Status: Find 🗟 🖓 🕼
VStaff
Staff Name: Type:
General Schools SpecialEd Emergency Credentials
Last Name First Name Middle Name Suffix Gender Type
Staff Info 🛛 🖓 Staff Role 🤇
No Photo Abbreviated Name Social Security Number Badge Number State ID Role Type
And the E-Mail Discipline
On file Birth Date Birth Place Highest Education Level
Race and Ethnicity
Hispanic/Latino Resolved Race/Ethnicity
Race 🕞 🛶 🕑
White Black Native American
🗖 Asian 🗖 Pacific Islander/Hawaiian 🗖 Declined to State

Staff Screen, Adding

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

Find Close	Assign			Form Status: Ready
StaffFind				
Assign To School				
	*			
Selection Criteria (Se	earching Student Inf	ormation System)	Q
Last Name	First Name	Gender	Badge Num	
User	Т		~	
Find Staffs				
Staffs				۵
Line Staff Name			Gender BadgeNun	1
-		Stafi	Find Screen	

- 3. Click the name of the staff member.
- 4. In the **Assign to School** list, click the school. If focused at the district, all schools are listed. If focused at a school, only the school in focus appears in the list.

Find Close Assi	gn Add New			Form	Status: Ready (Update Mode)
StaffFind					
Assign To School					
Kennedy High School	~				
Selection Criteria (Sear	ching Student Inform	nation System)		٩
Last Name	First Name	Gender	Badge Num		
User	Т		~		
Find Staffs					
Staffs					۵
Line Staff Name			Gender	BadgeNum	
1 User, Teacher			Female	4	
2 User, Test			Male	2	
3 User, TXP Admin			Female	3	
4 User, TXP Report			Female	5	
r		Cala ation of the	ha Staff and Sah		

Selecting the Staff and School

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

EDITING STAFF DATA

To edit a staff record:

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

Menu 🗸 🔇 🌒 ≫	Site Status: Find Status: Find Status: Find Status: Find Status: Find Status: Find Status: Sta	2 5
∀ Staff		«
Staff Name: Type:		
General Schools	SpecialEd Emergency Credentials	
Last Name	First Name Middle Name Suffix Gender Type Open User Window	
Staff Info		Staff Role 🛛 🕥
No Photo	breviated Name Nick Name Social Security Number Badge Number Teacher / Administrator License Number	Role Type
Edupoint Sta	ate ID Teacher / Administrator License Prefix	Conference
On file Jot	b Title E-Mail 😥	☐ Health □ Rater
Bin	th Date Birth Month Birth Day Birth Place	
Hig	ghest Education Level Baccalaureate Degree Institution	
	V V	
Hig	ghest Degree Institution	
	v Stoff Screen Finding	

Staff Screen, Finding

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



√Staff						
Staff Name: User ,	Teacher Type: Teacher					
General School:	s SpecialEd Emergenc	y Credentials				
Last Name	First Name	Middle Name	Suffix	Gender	Туре	
User	Teacher			Female	Teacher	*
	Staff Screen Ed	liting the Ton Ro	w of Inform	nation		

Staff Screen, Editing the Top Row of Information

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

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

To add a photo or replace an existing photo:

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



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

Attach Photo for User, Teacher
Steps To Upload Image:
 Click Browse and select the file you wish to upload
2) Click Upload
Browse
Upload Clear Photo
Attach Photo Screen

3. Click the Upload button.

Attach Photo for User, Teacher
Steps To Upload Image: 1) Click Browse and select the file you wish to upload 2) Click Upload
C:\Edupoint\TeacherPictur
Upload Clear Photo
Attach Photo Screen, Uploading

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

Message from webpage	X
Upload successful!	
C. OK	
Message Box	

The photo appears.

∀Staff											(
Staff Name: User, '	Teacher Type: Tea	cher									
General Schools	S SpecialEd En	nergency	Credentials								
Last Name	First Name	Mic	ddle Name	Suffix	Gender		Туре				
User	Teacher				Female	~	Teacher	~			
Staff Info									٩	Staff Role	
	bbreviated Name	Social Sec	urity Numbe	r Badge	Number State	e ID				Role Type	
	Jser, T.	333-33-333	33	3	1234	56				🔽 Audiology	
126	ob Title	E-Mai	il 😥							Conference	
	eacher	teach	er@edupoint	.com						🔽 Discipline	
	iirth Date B	lirth Place	- 1	Highest	Education Le	vel				🔽 Health	
		<entucky< td=""><td></td><td>Master's</td><td></td><td>~</td><td></td><td></td><td></td><td></td><td></td></entucky<>		Master's		~					

Photo Attached, Staff Screen

To remove a photo from a staff record:

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

Attach Photo for User, Teacher
Steps To Upload Image: 1) Click Browse and select the file you wish to upload
2) Click Upload
Browse
Upload Clear Photo
Attach Photo Screen, Removing Photos

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



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



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

∀Staff											
Staff Name: User	, Teacher Type: Te	acher									
General Scho	ols SpecialEd Ei	mergency	Credentials								
Last Name	First Name	١	Middle Name	Suffix	Gender		Туре				
User	Teacher				Female	*	Teacher	~			
Staff Info	_								0	Staff Role	
No Dhata	Abbreviated Name	Social S	ecurity Numb	er Badge	e Number State	e ID				Role Type	
No Photo	User, T.	333-33-3	3333	3	1234	56				🔽 Audiology	
Edupoint	Job Title	E-N	/lail 😥							🔽 Conference	
Europoint	Teacher	tea	cher@edupoint	com						🗹 Discipline	
0 - 51-	Birth Date 8	Birth Place	;	Highes	t Education Lev	vel				🔽 Health	
On file		Kentucky	-		's degree	~					
a				2	-						

Staff Screen, No Photo

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

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



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

Update Badge Type			Mass Assign Badge Numbers
		~	

Mass Assign Badge Numbers Screen

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

Check Status Later Abort		Form Status: Ready
Job Status		
Job Detail		۵
Job ID Description		
STAFF-ASGN-E Mass assign badge numbers		
Status		٥
Waiting: This job is next in the queue	4	
NOTE: This view will refresh regularly (until the job is complete) updating the status.		
Job Status Screen		

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



4. Click the **OK** button.

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

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



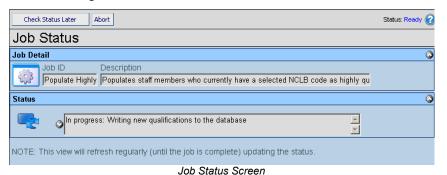
Menu Options, Populate Highly Qualified By Course

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

VPopulate Highly Qualified Staff
Options
NCLB Core □↔ 🕑
Core Academic - Elementary Level Core Academic - Secondary Level Not a core academic class under NCLB
Qual Method
×
Run Process
This process will add a record in the Highly Qualified - By Course grid (Staff->Credentials tab), for every section a staff member teaches where the Section is connected to a Course that uses the NCLB Core selection(s) from above.
Populate Highly Qualified Staff Screen

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

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



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



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

Close	Status: Ready 📝	2
Job Result	t	
Results		
Job Detail		0
	Description Highly Populates staff members who currently have a selected N dow is closed, you can review the results in the view, Job Queue Viewer.	
L	Click icon to open the result file	5
Line Result	Description	
	Populates staff members who currently have a selected NCLB code as highly qualified	
	Populate Highly Qualified Process Log	

Job Result Screen

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

Populate Highly Qualified By Course - NCLB courses 1,2 Qual Method H Result: Staff Name: Course Title: Course ID: ADDED Aderson, Gordon Ap Calc Bc MA51W ADDED Aderson, Gordon Student Aid SA99 ADDED Aderson, Gordon Algebra II MA402 Aderson, Gordon Ap Calculus Bc MA51W2 ADDED Bayer M., Michelle ADDED Math Standards MA90 ADDED Bayer M., Michelle MA40 Algebra II Geometry ADDED Bayer M., Michelle MA3O Bayer M., Michelle ADDED Std Math I MA902 Bayer M., Michelle ADDED Algebra II MA402 ADDED Bayer M., Michelle MA302 Geometry ADDED Bayer M., Michelle Student Aid SA99 Populate Highly Qualified Process Log

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

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

Staff								(0
Staff Name:	User, Teacher Type: Teache	r						
General	Schools SpecialEd Emerg	jency Credentials						
Last Name	First Name	Middle Name	Suffix	Gender	Туре			
User	Teacher			Female	Teacher	~		
Staff Info							🔇 Staff Role	: 🔇
		ocial Security Numb 33-33-3333	er Badge 3	Number State IE)		Role Type	
000	Job Title	E-Mail 😥					🔽 Confer	ence
	Teacher	teacher@edupoint	t.com				🔽 Discipli	ine
	Birth Date Birth	Place	Highest	Education Level			🔽 Health	
	📈 06/27/1972 🔛 Ken	tucky	Master's	degree 😽	•			
		Sending	an Ema	ail Message				

2. Complete and send the message as usual.

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

√Staff					4
Staff Name: Aderson, Gordon Type: Teacher					
General Schools SpecialEd Emergency	/ Credentials				
Last Name First Name	Middle Name St	uffix Gender	Туре	Open User Windo	w
Aderson Gordon		Male	Yeacher	×	
Staff Info	؟ 📀	Staff Role			C
Race and Ethnicity					0
Home Address		Mail Address			0
Phone Numbers				Add	0
Other Info					0
Current Hire Date Current Exit Date Exit Coo	de 📃 Exclud	e From State Repo	rting 🔲 Do Not Dis	play in ParentVUE	
07/27/2008	×				
Default Position Status Default Job Class De	fault Assignment T	ype FTE	District Personnel		
Tenured 🛛 👻 Teacher (K12) 🔽 Te	acher	✓ 1.00			
Experience					6
Years In District	State Teaching Ex	perience	Years Of Edu	cational Service	
2	4		10		
Division Administrative Experience	State Administrativ	e Experience	Total Administ	trative Experience	
Ell Indicator Language Of Ir	nstruction				
	*				

Staff Screen, General Tab, Experience Section

To update the years for all staff members:

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

[™] District Setu)									~
District Setup										
Options System Gra	de Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps			
Current System Year	🔇 Year	Permissions					6	Summer School		٨
Current Year Base Ye	ar Previ	ous Year(s) Pei	mission	Current Year Pe	rmission	Next Year(s	s) Permission	Summer School Yea	r Summer School 1	Гуре
2010-2011 🔽 2006	Updat	e	~	Update	*	Update	*			~
Organization Year Tree									Action 💌	
2005										
2006										
2007										
2008										
2009										
2010										
2011										
2012										
2013										
Staff Years										٨
Last Staff Year Incremen	t Date	E C	Incren	ment Staff Years	>					
District Setup Options										٨
Line Setup Options										
District Accommoda	ation Setu	p								
2 District Discipline C	ptions									
				District S	etup S	creen				

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

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

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

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

To create school year records:

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

Menu 🔻 🔇 🔍 💓 📑
Edit Staff Data
Upload Photo
Mass Assign Badge Number Populate Highly Qualified By Course
Populate Highly Qualified By Course
Synchronize District Staff

Menu Options, Synchronize District Staff

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

2. Click **OK**.

OVERVIEW OF USERS SETUP

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

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

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

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

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

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

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

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

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

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

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

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

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

User Group Settings

User Group	Organizations	Navigation Menu	Options	Security	POV
Org – District Name - Update	NightYRegularYSummerYPrevious YearUpdateCurrent YearUpdateNext YearUpdateNon-YearUpdateDistrictUpdate	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
Role - Nurse	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu: Default Heath Health Log Other Health Screen Medications Monitor	<i>POV Home Page: Health Login Page: Allow Dual Login</i>	Discipline SecCurrentDiscipline Org SecLowestConferenceLowestSchedulingNTXP AdminNStudent TeamYCase ManagerNGradebookV	Show Task List Yes Health Y Student Y
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student
	Night Regular Summer Previous Year Current Year Next Year Non-Year	Report User: Navigation Menu:	POV Home Page: Login Page: Allow Dual Login	Discipline Sec Discipline Org Sec Conference Scheduling TXP Admin Student Team Case Manager Gradebook	Show Task List Health Student

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

ADDING USER GROUPS

To create a user group:

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

Menu V 🛞 🛞 💭 Find Und Add Delete	Status: Find 🔊 🖓 💱 🕝
[™] User Groups	(«
User Group Name:	
Members Organizations Navigation Menu Options Security Settings POV	
User Group Name Name of user group in LDAP (if synching with Lt	DAP)
Members	Chooser 🔇
K Line User Name Email Course Focus Organization Image: Second Se	ear Disabled 🔶
User Groups Screen	

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

Save Close	
User Groups	(«
User Group Name	Name of user group in LDAP (if synching with LDAP)
Virtual Root Node	
×	

User Groups Add Screen

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

Members Tab

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

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

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

[™] User Groups		«
User Group Name: Role - Nurse		
Members Organizations Navigation Menu Option	s Security Settings POV	
User Group Name	Name of user group in LDAP (if synching with LDAP)	
Role - Nurse	Nurses	
Members		Chooser 🚺
X Line User Name Email	⇒ Login Name ⇒ Focus	Disabled 🝦
	Organization \Leftrightarrow Year	

User Groups Screen, Adding Members

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

Find Select					
Chooser					
Find Criteria					(`
Last Name	First Name	Middle Name Email		Login Name	
user					
		Add Selected Row(s) >	Add All Row(s) >>		
Search Results					
Find Result		؟ (۵)	Selected Items		٨
Line Last Name First I	Name Middle Name	Email Login Name		rst Middle ame Name	Email Login Name

Finding Users using the Chooser Screen

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

Find Select								
Chooser								
Find Criteria								6
Last Name	First Name Mid	dle Name	Email		Login	Name		
	Add	Selected Row	(s) >	Add All Row(s) >:	>			
Search Results								
Find Result		٨	Se	elected Items				٥
Line Last First Mid Name Name Name		Login Name	×	Line Last Name		Middle Name	Email Login Name	
1 User Admin	Admin@edupoint.com	Admin						
2 User Teacher	teacher@edupoint.com	teacher						
3 User Test	test@edupoint.com	test						
4 User Admin	txp@edupoint.com	txp						
5 User TXP Report	txp@edupoint.com	txpreport						
	O a la atta			h				

Added users appear in the Selected Items grid.

Selecting Users in the Chooser Screen

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

Fine	1 (1	Select													
Ch	005	ser													
Find	Criter	ia													(
Last	Name		F	First Name	Mide	dle Name	Emai					Login I	Vame		
					Add S	ielected Row(s) >	1	Add A	All Row(s)) >>				
500	reh Dr	neulte													
	rch Re Resu					([Sel	ected	ltems					<u></u>
Find	Resu Last	lt	Middle Name	Email		Cogin Name		Sel ×		Loct	First Name	Middle Name	Email		ogin lame
Find Line	<mark>Resu</mark> Last Name	lt First		Email Admin@edupoi	int.com	Login				Last					ogin Iame
Find Line	Resu Last Name User	lt First Name	Name			Login Name Admin				Last Name	Name			N	ogin Iame
Find Line 1	Resu Last Name User User	lt First Name Admin	Name	Admin@edupoi	oint.com	Login Name Admin	,			Last Name	Name			N	ogin Iame

Adding Users using the Chooser Screen

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

∀User	r Groups								~~
User Group	o Name: Role -	Nurse							
Members	Organizations	Navigation Menu	Options	Security Settings	POV				
User Group	o Name			Name of user group	in LDA	^o (if synching t	with LDAP)		
Role - Nurse	Role - Nurse Nurses								
Members								Chooser	
	Upor Nomo	Finail		Login Namo 4		Focu	s		
	Jser Name	Email	¢	Login Name 🗧		Focu Drganization	s rightarrow Year	Chooser Disabled	© 0
× Line L		Email	¢	Login Name 🗧 <u>test</u>			-		

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

Organizations Tab

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

1. Click the **Organizations** tab.

✓User Groups		(«
User Group Name: Role - Nurse		
Members Organizations Navigation Menu Option	ns Security Settings POV	
User Group Name	Name of user group in LDAP (if synching with LDA	AP)
Role - Nurse	Nurses	
Year Extensions		۵
Possible Year Extensions		
Access Permissions		٨
Previous Year(s) Current Year	Next Year(s) Non	Year
Allow LDAP monitoring to create staff school year e	entries for specific school organizations listed belo	₩.
NOTE: Organizations above the school level will not b	e evaluated.	
Organizations		Chooser 🔇
X Line Organization Name	⇒ Organization Up	late 🔶
Virtual Organization Settings		۵
Virtual Root Node		
C Allow Lower Virtual Node Users to Modify Member	List	

Organizations Tab, User Groups Screen

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

Find Select		
Chooser		
Find Criteria		۵
Organization Name		
<u> </u>		
	Add Selected Row(s) >	Add All Row(s) >>
Search Results		
Find Result	۵	Selected Items 🔇
Line Organization Name		X Line Organization Name
	Chooser	Screen

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

Find Select			
Chooser			
Find Criteria			
Organization Name			
	Add Selected Row(s)	s) > Add All Row(s) >>	
Search Results			
Find Result	٨	Selected Items	٨
Line Organization Name		X Line Organization Name	
1 1. Elementary Schools			
2 2. Middle Schools			
3 3. High Schools			
4 4. Special Schools			
5 Adams Elementary			
6 Central Enrollment			
7 Continuation High School			
8 Edupoint School District			

Adding Organizations to the Selected Items Grid

8. Click the **Select** button.

Find Select			
Chooser			
Find Criteria			
Organization Name			
	Add Selected Row((s) > Add All Row(s) >>	
Search Results			
Find Result	۵	Selected Items	٨
Line Organization Name		X Line Organization Name	
1 1. Elementary Schools		1 3. High Schools	
2 2. Middle Schools			
3 4. Special Schools			
4 Adams Elementary			
5 Central Enrollment			
6 Continuation High School			
7 Edupoint School District			
	Selecting t	he Organizations	

The selected organizations appear in the Organizations grid.

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

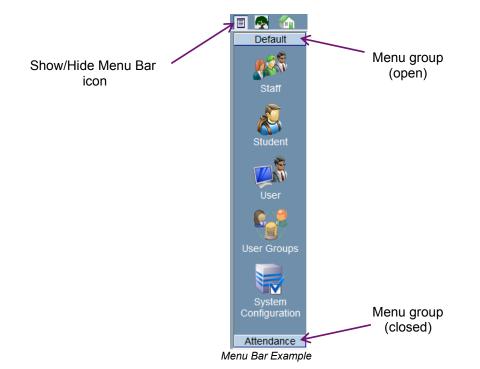
♥User Groups	
User Group Name: Role - Nurse	
Members Organizations Navigation Menu Opti	tions Security Settings POV
User Group Name	Name of user group in LDAP (if synching with LDAP)
Role - Nurse	Nurses
Year Extensions	Q
Possible Year Extensions	
🔽 Night 🔽 Regular 🔽 Summer	
Access Permissions	Q
Previous Year(s) Current Year	Next Year(s) Non Year
Update 👻 Update 👻	Update 💌 Update 👻
Allow LDAP monitoring to create staff school yea	ar entries for specific school organizations listed below.
NOTE: Organizations above the school level will no)t be evaluated.
Organizations	Chooser 📀
X Line Organization Name	🗧 Organization Update 🔶
1 3. High Schools	View 💌
2 King High School	Update 👻
Virtual Organization Settings	
Virtual Root Node	
×	
🗖 Allow Lower Virtual Node Users to Modify Memb	er List

Setting Organization Access

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

Navigation Menu Tab

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



To create a custom menu group for this user group:

1. Click the Navigation Menu tab.

∀User Groups	(«
User Group Name: Role - Nurse	
Members Organizations Navigation Menu Options	Security Settings POV
User Group Name Na	me of user group in LDAP (if synching with LDAP)
Role - Nurse Nu	rses
Select a user whose default saved report settings are use	ad for report execution 🔶
NOTE: Currently, the default report preferences user for	a group is only implemented in TeacherVUE.
\square Default Use Menu Group for a new user added to this	group
Navigation Tree	Action 🔽 📀

Navigation Menu Tab, User Groups Screen



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

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

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

∀User Groups			(«
User Group Name: Role - Nurse			
Members Organizations Navigation Menu	ptions Security Settings PO	V	
User Group Name	Name of user group in LDA	P (if synching with LDAP)
Role - Nurse	Nurses		
Select a user whose default saved report settings	are used for report execution	•	
NOTE: Currently, the default report preferences (user for a group is only impleme	nted in TeacherVUE.	
E Default Use Menu Group for a new user added	I to this group		
Navigation Tree		Action	• 📀
		Action	
		Add Gro	up du

User Groups Screen, Navigation Menu Tab, Add Group

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

Save Close	
New Navigation Group	«
Add Group Name	۵
Name	
Health	

New Navigation Group Screen

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

'∀User Groups	(«	
User Group Name: Role - Nurse		
Members Organizations Navigation Men		
User Group Name	Name of user group in LDAP (if synching with LDAP)	
Role - Nurse	Nurses	
Select a user whose default saved report settings are used for report execution + NOTE: Currently, the default report preferences user for a group is only implemented in TeacherVUE. Default Use Menu Group for a new user added to this group		
Navigation Tree	Action 🔽 🕥	
▶ Health	Set Group Order	
	X Line Name	
	I Health	
	Move Up Move Down	

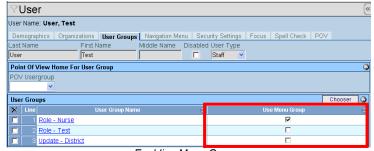
Adjusting Menu Group Order

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

♥User Groups		ļ
User Group Name: Role - Nurse		
Members Organizations Naviga	tion Menu Options Security Settings POV	
User Group Name	Name of user group in LDAP (if s	ynching with LDAP)
Role - Nurse	Nurses	
Select a user whose default saved i	report settings are used for report execution +	
2 C C C C C C C C C C C C C C C C C C C	preferences user for a group is only implemented in	n TeacherVUE.
Default Use Menu Group for a n	ew user added to this group	
Navigation Tree		Action
▶ Health		Action Add Link to Health
	Set Group Order	Add Report to Health
		Add View to Health Delete Health
	Move Up Move Down	
User G	roups Screen, Navigation Menu Tab, Ac	tion Menu
Save Close		
Add View		(«
Add View Item		
View Lookup		
	~	
	Add View Screen	
Note - Tea	cherVUE screens should be add	ded for Teacher\/LIF us
	E screens show (K12.TXPInfo) f formation, see the <i>Synergy SIS</i> -	

- 8. To save the changes to the menu, click the **Save** button.
- To enable the menu for a user, go to Synergy SIS > System > User > User, find the user's record, and on the User Groups tab, check the Use Menu Group box for the user group.

This is unnecessary if the user was added to the group after the **Default Use Menu Group** box was checked. (See step 2)



Options Tab

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

1. Click the **Options** tab.

∀User Groups	(«
User Group Name: Role - Nurse	
Members Organizations Navigation Menu Options	Security Settings POV
User Group Name	Name of user group in LDAP (if synching with LDAP)
Role - Nurse	Nurses
Point Of View Home Page	۵
POV Home Page	
Change POV Home Page	
Please Select a page for the user to log into	
Login Page Allow Dual Login	
Options T	ab. User Groups Screen

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

Select Clear Value Close
√UserPADTreeFind
Navigation Tree
ESD
Genesea
▼ Genesis
Attendance
▶ AZ
Course
Course History
Discipline
Discipline Incident
Fees
Grade Book
▶ Grading
✓ Health
Reports
▶ Setup
Lealth
👇 Health Log Other
LlearDADTreeFind Sereen

UserPADTreeFind Screen

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

♥User Groups				(«
User Group Name: Role -	Nurse			
Members Organizations	Navigation Menu	Options	Security Settings POV	
User Group Name		 M	Name of user group in LDAP (if synching with LDAP)	
Role - Nurse			Nurses	
Point Of View Home Page	9			٥
POV Home Page				
Health	Change POV Home	Page		
Please Select a page for t	the user to log into			
Login Page A	llow Dual Login			
~	~			
		Horr	ne Page Changed	

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

Security Settings Tab

To adjust global security options for a user group:

1. Click the Security Settings tab.

♥User Groups			
User Group Name: Role - Nurs	se		
Members Organizations Na	wigation Menu Optic	ns Security Se	ettings PV
User Group Name		Name of user	group in LDAP (if synching with LDAP)
Role - Nurse		Nurses	
Discipline		٥	Conference
Discipline Security Discipline C	rganization Security		Conference Visitation
*	*		×
			Student Enrollment History
			Student Enrollment Organization Security
			×
Scheduling			Special Education
Allow Override of Max Students	s in Class 🔍 🗸		Exempt From Student Team
Q44			
Other			Systemwide Case Manager
TeacherVUE Administrator	 AdminVUE User 	×	×
			Grade Book
			Grade Book Security
			×
User Session State Manageme	ent		
Time, in minutes, of inactivity b		s shown	
and will require the user to log		1	
Time, in minutes, of inactivity to			
closed, pending changes not o to a login screen	committed and user is	s returned	
Exclude From PAD and BO	Security Views		
Default Entry Access Times			
Default Linuy Access Times			Access Time Period
Line Day of Week	Enabled	Begin	End
1 Monday	~		
2 Tuesday	~		
3 Wednesday	~		
4 Thursday	~		
5 Friday	~		
6 Saturday	~		
7 Sunday	~		
User Groups to Administer			Chooser
X Line			Group Name

Security Settings Tab, User Groups Screen

Notes

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

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

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

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

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

Defa	Default Entry Access Times 📀						
Lino	Line Day of Week	Enable	Fuchlad		Access Time Period		
LIIIE	Day of Week	спаше	u		Begin	End	
1	Monday	Yes	*		6:00 AM	6:00 PM	
2	Tuesday	Yes	~		6:00 AM	6:00 PM	
3	Wednesday	Yes	*		6:00 AM	6:00 PM	
4	Thursday	Yes	*		6:00 AM	6:00 PM	
5	Friday	Yes	~		6:00 AM	6:00 PM	
6	Saturday	No	~				
7	Sunday	No	*				

Default Entry Access Times

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

User Groups to Administer		Chooser
X Line	User Group Name	\ominus
	User Groups to Administer Section	

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

POV Tab

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

1. Click the POV tab.

∀User	Groups			(«
User Group	Name: Role - I	Nurse		
Members	Organizations	Navigation Menu	Options	s Security Settings POV
User Group	Name		N	Name of user group in LDAP (if synching with LDAP)
Role - Nurse)		<u>م</u>] [Nurses
Task Setup)			O
Show Task	List			
No	*			
Task Modu	ile			
🗖 Health 🛛	🗆 Student 🗖 Ind	cident Discipline 🗖	Electronic	nic Student Record 🗖 PVUE Update
				Tab. Maan One was Oans an

POV Tab, User Groups Screen

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

EDITING USER GROUPS

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

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



2. Make the desired changes.



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

To delete a user group:

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

Menu V 🔇 🔍 🚿 Save	Undo Add	Delete				Status	: Ready 🛛 🛞 🎙	} 2
VUser Groups								~
User Group Name: Role - Nurse								
Members Organizations Navigation Me	enu Options	Security Settings	POV					
User Group Name	Na	ame of user group i	n LDAF	, (if synching with L	DAP)			
Role - Nurse	N	urses						
Members							Chooser	
X Line User Name Ema	il 🔶	Login Name		Focus	\$		Disabled	
	- ▽			Organization		rear	Disableu	
I User, Test test@edupoint	t.com	test	Ho	pe High School	2	2010-R	Γ	
Removing Members								

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



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

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

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



2. Click OK to close the box.



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

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



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

Change	Form Status: Ready (Update Mode)				
✓Mass Change User Group Members	✓Mass Change User Group Members				
For members of the group: Role - Nurse					
Mass Change Options for Users in Group - Fill to set, leave blank to skip	(۵				
New Focus Year					
New Focus Organization					
New Focus Active/Inactive Inclusion					
Disable Account					

Mass Change User Group Members Screen

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



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

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

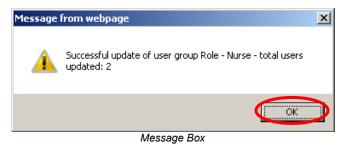


6. In the **Disable Account** list, click **Yes**.

Change	Form Status: Ready (Update Mode)
VMass Change User Group Members	
For members of the group: Role - Nurse	
Mass Change Options for Users in Group - Fill to set, leave blank to skip	()
New Focus Year	
New Focus Organization	
New Focus Active/Inactive Inclusion	
Disable Account	

Mass Change User Group Members Screen

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



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

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

Menu 🗸 🔍 🛞	Sav			
Edit SISUserGroup Data				
Force Password Change (On Next Login			
Mass Change Member Us	ers			
Duplicate User Group				
View Audit Detail For Use	r Groups 🧧			
Menu Options				

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

Duplicate Group	Status: Ready 🕜
♥Duplicate User Group	
Duplicate User Group Options	<u>۞</u>
Group to Copy From	
Role - Nurse	
New Group Name	
Duplicate PAD Security	
🗖 Duplicate Business Object Security	
Duplicate Members	

Duplicate User Group Screen

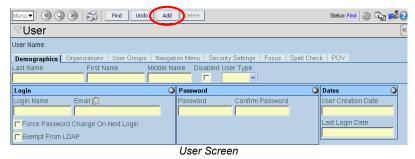
- 3. To copy the settings for the **PAD Security** and **Security Definition** screens, check the **Duplicate PAD Security** and **Duplicate Business Object Security** boxes. By default, all settings in the User Groups screen are copied.
- 4. To copy the users assigned to the group, check the **Duplicate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

ADDING USERS

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

To create a user account:

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



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

Find Close C	reate User			Form Status: Ready
UserFind				
Selection Criteria				8
Last Name		First Name	Middle Name	SSN
Please enter new lo	gin name, password a	and email address for new	/ user	0
User Name	Password	Confirm Password	Email	
Find Users				
Users				۵
Line Last Name	First Name	Middle Name	Social Security Nu	imber
		UserFind Scree	n	

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

Find Close Create User Status: Ready											
UserFind											
Selection Criteria					٨						
Last Name		First Name	Middle Name	SSN							
smit											
Please enter new logir	Please enter new login name, password and email address for new user										
User Name	Password	Confirm Passwor	d Email								
Find Users											
Users					٨						
Line Last Name	First Name	Middle Name	Social Security N	lumber							
1 Smith	Christine		123-45-6789								
2 Smith	John										

Selecting Staff Member for User Account

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

Find Close Cri	eate User			Form Status: Read
UserFind				
Selection Criteria				(
Last Name		First Name	Middle Name	SSN
User		New		
Please enter new loc	in name, password	and email address for	new user	(
User Name	Password	Confirm Passv	vord Email	
newuser	•••••	•••••	newuser@edup	pint.com
Find Users				
Users				۵
Line Last Name	First Name	Middle Name	Social Security Num)er

Entering New User Information in the UserFind Screen

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

Find Close Crea										
UserFind										
Selection Criteria					٨					
Last Name		First Name	Middle Name	SSN						
User		New								
Please enter new logir	name, password an	nd email address for new	user		<u></u>					
User Name	Password	Confirm Password	Email							
newuser	•••••	•••••	newuser@	edupoint.com						
Find Users										
Users					۵					
Line Last Name	First Name	Middle Name	Social Security	Number						
1 User	New									
		Creating User								

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

Demographics Tab

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

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

∀User									~
User Name: User, N	ew								
Demographics 🔎	rganizations User Group	s Navigati	on Menu 🛛 Se	ecurity Settings	Focus	Spell Check	k POV		
Lastivame	First Name	Middle Na		d User Type					
User	New			Staff 🛛 🚩					
Login		٨	Password			٨	Dates		
Login Name	Email 😥		Password	Confirm	Password		User Creatio	n Date	
newuser	newuser@edupoint.com						06/19/2011 2	3:59:44	
Force Password	Change On Next Login						Last Login D	ate	
Exempt From LD	AP								
Address			Preferences]			
Address			Default Mod	e Paging Size P	Paging Ro	w Size			
			~						
City	State ZIP Code +4		🗖 Show Qui	ck Launch					
	¥		Debua Expir	ation (Hours fro	n Now)				
			0						
			POV Home F	ade					
					Change F	OV Home Page			
Phone Numbers								Add	
	A T			Fatanaian		Cautaa	t 合		
🗙 Line Prim	агу 🚖 Туре	🔶 Ph	one 🔤	Extension		Contac		Listed	Ş

Demographics Tab, User Screen

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



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

Organizations Tab

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

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

∀User									~~
User Name: User, New									
Demographics Organiz	ations User Groups	Navigation N	/lenu Se	curity Settings	Focus	Spell Check	POV		
Last Name	First Name 1	Middle Name	Disable	d User Type					
User	New			Staff 🛛 👻					
Year Extensions									٨
Possible Year Extension									
Access Permissions									0
Previous Year(s)	Current Ye	ar 🗸	N	ext Year(s) 🗸	·	Non Y	′ear ✓]	
Organizations								Chooser	
X Line	Organization Name	9	Ş		0	rganization Upd	ate		\Leftrightarrow

Organizations Tab, User Screen

User Groups Tab

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

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

∀User								(«
User Name: Use	er, New							
Demographics	Organizations User Gro	ups Navigation Menu	Security Settings	Focus S	Spell Check F	VOV		
Last Name	First Name	Middle Name Di:	abled User Type					
User	New		🗖 Staff 💌					
Point Of View I	Home For User Group							٨
POV Usergroup	2							
×								
User Groups							Chooser	
X Line	User Group	Name	\bigcirc		Use Menu Group			e e
		User Groups 1	ab, User Scre	en				

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

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

Find Select		
Chooser		
Find Criteria		0
User Group Name		
Role		
	Add Selected Row(s) > Add All Row(s) >>	
Search Results		
Find Result	Selected Items	٨
Line User Group Name	🗙 🛛 Line User Group Name	
	Chooser Screen	

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

∀User						«				
User Name: Use	r, New									
Demographics	Organizations User Gro	ups Navigation Menu	Security Settings	Focus	Spell Check POV					
Last Name	First Name	Middle Name Dis	sabled User Type							
User	New		🗖 Staff 💌							
Point Of View Home For User Group										
POV Usergroup										
*										
User Groups						Chooser 🔇				
X ine	User Grou	p Name	\Leftrightarrow		Use Menu Group	Ş				
1 Role -	Genesis User									
2 Role -	Nurse									

User Groups Tab, User Screen, Groups Added

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

⊽User									(
User Name: Use	r, New									
Demographics	Organizations	User Groups	Navigation M	enu Securi	ty Settings	Focus	Spell Check	POV		
Last Name	First N	ame	Middle Name	Disabled U	lser Type					
User	New				Staff 🛛 🔽					
Point Of View H	lome For User G	roup							Ç	
POV Usergroup										
Role - Nurse 🚩										
User Groups									Chooser 🔇	
X Line	User Group Name 🚔			∂	🗧 🛛 Use Menu Group					
1 Role - Genesis User										
2 Role -	- Nurse									

User Groups Tab, User Screen, POV Usergroup

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

Navigation Menu Tab

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

∀User												«
User Name: Use	er, New											
Demographics	Organizations	User Groups	Navigation M	lenu 🛛	Security Se	ettings	Focus	Spell Check	POV			
Last Name					ed User T							
User	New				Staff	~						
Navigation Mer	Navigation Menu Action 🔽 🔇											

Navigation Menu tab, User Screen

Security Settings Tab

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

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

∀User								
User Name: Aders	on, Gordon							
Demographics O	rganizations	User Groups	Navigation M	enu	Security Security	ettings	Focus	Spell
Last Name	First Na	ame	Middle Name	Dis	abled User	Туре	Login a	s User
Aderson	Gordon				Staff	~		
Discipline								٢
Impersonation								٢
Scheduling								٢
Scheduling								
Other								<u></u>
Show BO On M	ouseover							
TeacherVUE Admin	nistrator	AdminVUE	E User 🔽 🗸	Hea	IthVUE User		*	
	C.	ocurity Sottin	as Tab Llea	r Sore	an			

Security Settings Tab, User Screen

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

Last Name Go	es By
	Last Name Goes By : (40 - STRING) (K12-Student-LastNameGoesBy) c
SAIS ID	BO on Mouseover

Focus Tab

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

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

1. Click the **Focus** tab.

∀User									~
User Name: Use	er, New								
Demographics	Organizations	User Groups	Navigation Mer	nu Seci	urity Settings	Focus	Spell Check	POV	
Last Name	First N	lame	Middle Name	Disabled	User Type				
User	New				Staff 🛛 💌				
Focus Year Sele	ection	Show Inactive	Students						
	*	Active Only	*						
Focus Organiza	ation								(
Edupoint Scho	Edupoint School District								

Focus Tab, User Screen

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

Spell Check Tab

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

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

∀User								~	
User Name: Use	r, New								
Demographics	Organizations	User Groups	Navigation Me	nu Secu	irity Sett	ings	Focus Spell Check POV		
Last Name	First N	lame	Middle Name	Disabled	User T	уре			
User	New				Staff	~			
Options								0	
🔽 Ignore All-Ca	pital Words		🔽 Ignore Mixed-Digit Words				🔽 Ignore Filenames		
🔽 Ignore First-(Capital Words		🔽 Ignore Hyphenated Words				🔽 Ignore Html Tags		
🔽 Ignore Mixed-Capital Words			🔽 Ignore Repeat Words				🔽 Ignore Internet Addresses		
Custom Word L	ist						Add		
X Line Word									

Spell Check Tab, User Screen

- 2. Check or uncheck the **Options** available for the spell check. The options are:
 - Ignore All-Capital Words words that are in all capital letters, such as SYNERGY SIS.
 - Ignore First-Capital Words words where the first letter is capitalized, such as Edupoint.
 - Ignore Mixed-Capital Words words with capital letters in the middle, such as McAllister.
 - Ignore Mixed-Digit Words words that have numbers as well as letters, such as W3C.
 - Ignore Hyphenated Words words that have a hyphen, such as email.
 - Ignore Repeat Words words that are spelled the same throughout the text.
 - Ignore Filenames words that represent computer file names, such as word.exe.
 - Ignore HTML Tags words used in HTML tags, such as <a href>.
 - **Ignore Internet Addresses** words included as part of a web address, such as **www.edupoint.com**.
- 3. Add custom words, such as the names of schools, to the standard dictionary. To add a custom word, click the **Add** button in the **Custom Word List** section, and type the word in the Word column of the new line.

Custom Word List Add							
$ \times$	Line	e Word					
	1	1 Edupoint					

Custom Word List

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

POV Tab

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

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

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

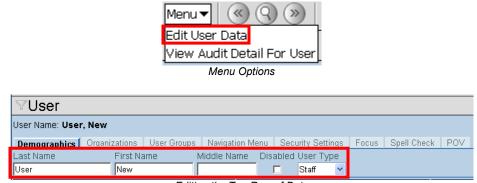
⊽User										«
User Name: Us	er, New									
Demographics	Organizations	User Groups	Navigation Menu	J Security Settin	gs Focus	Spell Check	POV			
Last Name	First N	lame	Middle Name	Disabled User Ty	ре					
User	New			Staff	*					
Point of View ((POV) Home Pag	e Settings								٩
Dashboard Cor	ntrols Per Row									
Dashboard Cor	ntrols							Add	Chooser	
X Line	Orderby 🔶	Name	⊖ GraphTy	be 🔶	Widget ID	\ominus	Last Upda	te Date Time	e	\Rightarrow
Task Setup										
Show Task List	:									
No 🔽	•									
Task Module										
Electronic S	Student Record I	🗆 Health 🗖 Inc	ident Discipline 🛙	🗆 PVUE Update 🛚	Student					
P			501	T-1. 11						

POV Tab, User Screen

EDITING USERS

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

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



Editing the Top Row of Data

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

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

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

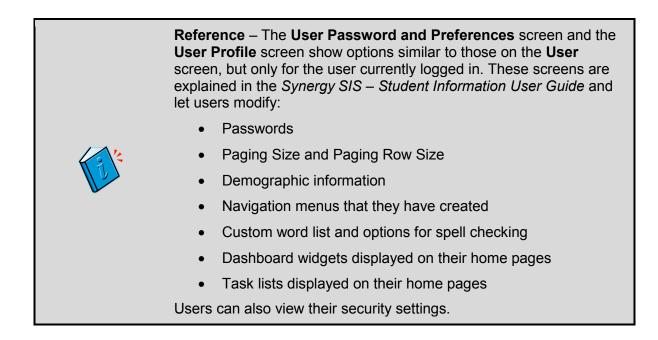
1. Click the Menu button and select Edit User Data.



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

∀User								
User Name: User, New								
Demographics	Organizations	User Groups	Navigation M	enu Seci	urity Settings	Focus	Spell Check	POV
Last Name	First Na	ime	Middle Name	Disabled	User Type			
User	New				Staff 🛛 💌			

Editing the Top Row of Data



Chapter Five: ANNOUNCEMENTS AND ONLINE HELP

This chapter covers:

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

ANNOUNCEMENTS

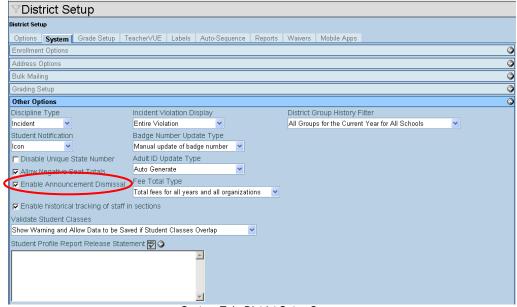
Announcements are displayed on the home page of Synergy SIS. They may be specific to any level of the organization: for example, a school, a group of schools such as all elementary schools, or the district.

Good evening, Admin User							
Announcements							
Line	Urgency	Organization Name	Announcement				
1	۳	Edupoint School District	Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.				
2	۳	Edupoint School District	Reminder: There will be an assembly in the gymnasium on Friday.				

Announcements on the Home Page

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

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



System Tab, District Setup Screen

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

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

Good	Good morning, Admin User								
	5how Dismissed I	Messages							
Anno	uncemenis								
Line	Urgency	Organization Name	Announcement	Dismiss or Recall Measure					
1	۳		Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.	Dismiss					
	Dismissing Announcements								

To add or modify an announcement:

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

Menu V Save Undo	Form Status: Ready (Update Mode) 😂 🖓 📢
✓Announcement Tree	(«
Announcement Tree	0
Edupoint School District	
Announcerr	ent Tree Screen

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

VAnnouncement Tree	(
Announcement Tree	۵ ۵
Edupoint School District	
1. Elementary Schools	Announcements
Adams Elementary	
Grant Elementary	Announcements Add Show Detail
Jefferson Elementary	X Line Expire Date Announcement
Lincoln Elementary	State testing will be taking place this
 Washington Elementary 	Thursday at 9:00 am for all 7th graders.
▼ 2. Middle Schools	1 09/02/2012 P
Eisenhower Middle School	
Roosevelt Middle School	
 Truman Middle School 	
3. High Schools	
4. Special Schools	
5. Closed Schools	

Expanded Organization Tree with Announcement

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

Announcement Tree	۵
Edupoint School District 1. Elementary Schools 2. Middle Schools 3. High Schools	Announcements Add Show Detail Q
4. Special Schools 5. Classed Schools	X Line Expire Date \ominus Announcement HTML Announcement
5. Closed Schools	■ 1 12/27/2013 ■ Because we have been experiencing power outages in the afternoon, please limit your use of <->power hungry - equipment and devices during afternoon peak periods. ■ Because we have been experiencing power outages in the afternoon, please limit your use of or power hungry* equipment and devices during afternoon peak periods.

Adding a District Announcement

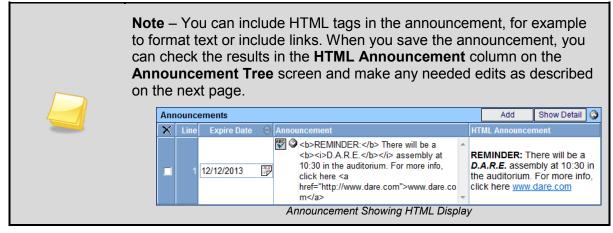
4. In the **AnnouncementDetail** screen, enter the date to begin displaying the announcement in the **Display Date** box, and the date to stop displaying the announcement in the **Expire Date** box.

Save Close		
AnnouncementDetail		«
Display Date Expire Date Urgency Allow Dismissal	×	
User Groups	Add	Chooser 🔕
X Line User Group Name		\Leftrightarrow

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

Anno	uncements		
Line	Urgency	Organization Name	Announcement
1	۳	Edupoint School District	Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.
2	۳	Edupoint School District	Reminder. There will be an assembly in the gymnasium on Friday.

- 6. To allow the announcement to be dismissed from the home page, check the **Allow Dismissal** box.
- 7. Enter the text of the announcement in the **Announcement** box.



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

AnnouncementDetail Screen

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

Save Close	
AnnouncementDetail	(
Display Date Expire Date Urgency Allow Dismissal 04/01/2013 🗊 04/05/2013 🗊 Normal 🗸 🗖	
A few spaces in the north parking lot will be unavailable next week.	* *
User Groups Add	Chooser 🤇
X Line User Group Name	Ę

Announcement Detail Screen

To edit an existing announcement:

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

♥Announcement Tree				(«
Announcement Tree				۵
Edupoint School District	Ann	ounc	cements	
		ounc Line	ements Expire Date 😝	Add Show Detail
		1	12/30/2011	Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.

Editing an Announcement

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

Announcement Tree		G
Edupoint School District	Announcements	
	Announcements	Add Hide Detail 🔇
	Line Expire Date	gency Allow Dismissal
	1 12/30/2011 Display Date Expire Date Urg 03/05/2009 12/30/2011 12 Urg	<u> </u>
	Announcement 🕎 🛇	
	Because we have been experiencing power please limit your use of "power hungry" eq afternoon peak periods.	
	User Groups	Add Chooser 🙆

Announcement Detail

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

4. Make changes as needed.



Note – To use the built-in HTML editor, click the **Edit HTML** button. To clear the **HTML Announcement** box while leaving the **Announcement** box unchanged, click the **Clear HTML** button.

For information about the HTML editor, see page 240.

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

		(
Announcement Tree		Q
Edupoint School District		
	Announcements	
	Announcements	Add 🚺 Hide Detail 🚺
	Line Expire Date	
	1 12/30/2011 Display Date Expire Date	Urgency Allow Dismissal
	03/05/2009 📝 12/30/2011 🚦	🗗 Urgent 💌 🔽
	Announcement 🕎 📀	
	Because we have been experiencing	
	please limit your use of "power hung afternoon peak periods.	ry" equipment and devices during
	alteritoon peak periods.	-
	User Groups	Add Chooser 🔇
	X Line Use	er Group Name 🔶

Main Screen, Announcement Tree

ONLINE HELP

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

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

		Ecupoint	Hope High School Year2011-2012 UserAdmin User Show active approved
🖅 🔲 🖪 🧖 🏠 Quick Launch	R		Lock Sign Out Supp rt Help
		Accessing Online Help	

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

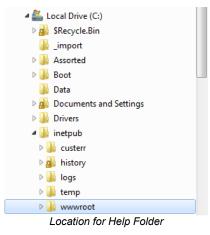


The **Help** link and the question mark button can open the same help system or different help systems, depending on your configuration, as described on page 172.

Installing Help

To install Edupoint's online help:

- 1. Download the help from the Edupoint FTP site. For FTP access instructions, see the *Synergy SIS – System Installation Guide*.
- 2. Open the _Release directory, the subdirectory for your release, and the Help subdirectory. For example: / Release/8.0.0/Help/
- 3. Download the zip file containing the appropriate help. The most general help is in Help_USA.zip; other files contain state-specific or other specialized information.
- 4. In Windows Explorer, navigate to the root of the location where Synergy SIS is installed on the web server (generally c:\inetpub\wwwroot), and create a new folder called Help.



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



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

Configuring Help

To configure the help available through the **Help** link and question mark button 2:

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

http://192.168.150.114/Help/gened.htm

✓System Configuration				
System Configuration				
Security Options Advanced				
Page Definitions		. Ö		
Support Page	Help Page			
SupportSite/index.htm	http://10.10.0.1/Help/gened.htm			
Contact Us - Set to an email address o	r URL (to hide link set value to '	remove')		

System Configuration Screen, Help Location

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

http://192.168.150.114/Help

System Configu	uration			
System Configuration				
Security Options Advance	d			
Page Definitions				0
Support Page	Help	Page		
SupportSite/index.htm	http	//10.10.0.1	/Help/gened.htm	
Contact Us - Set to an email a	address or URL	(to hide li	ink set value to 'remove')	
Help System				0
Enable Context Sensitive I	Help			
Help System				
RoboHelp 😪				
Help System URL				
http://10.10.0.1/Help				

System Configuration Screen, Context-Sensitive Help Location

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

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

SUPPORT PAGE

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

Synergy Education Platform	Edupoint School District	Hope High School Year: 2012-2013 User: Admin User Show active and inactive
🔄 TYUE 🗐 👰 🏠 🕮 Quick Launch		Lock Sign Out Support Help
	Support Link	

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

Edupoint	*
Synergy Support	-
Please contact your local school, district, or service bureau phone line or e-mail support.	
They will be able to help you with your question or problem.	
Thank You,	
Edupoint Educational Systems, LLC	
Close	
	-

Default Support Page

To create a custom support page:

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

VSystem Configu	ration
System Configuration	
Security Options Advance	d .
Page Definitions	Q
Support Page	Help Page
SupportSite/index.htm	
Contact Us - Set to an email a	ddress or URL (to hide link set value to 'remove')

System Configuration Screen

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

CONTACT US LINK

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

Password	<image/>	
Eclupoint Contact W Check For Popule Add This Page to My Favorites Copyright © 2002-2011 Edupoint Educational Systems: All rights reserved. Login Page		Copyright © 2002-2011 Edupoint Educational Systems. All rights reserved.

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

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

To change the behavior of the Contact Us link:

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

VSystem Configuration				
System Configuration				
Security Options Advanced				
Page Definitions				
Support Page	Help Page			
1				
Contact Us - Set to an email address or URL (to hide link set value to 'remove')				
admin@edupointschooldistrict.com				

System Configuration Screen

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

LOGIN PAGE

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

Synergy Student Information System	Edupoint School District
Special Education	Please enter your login name and password below to access the application. Login Name Password
Edupoint	Login Contact Us Check For Popup Add This Page to My Favorites Copyright © 2002-2011 Edupoint Educational Systems. All rights reserved.

Logon Page

To create a custom login page for the district:

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



Chapter Six: SCANNING

This chapter covers:

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

OVERVIEW OF SCANNING

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

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



Sample Pre-Printed Form

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

Currently, Synergy SIS supports the following scanners:

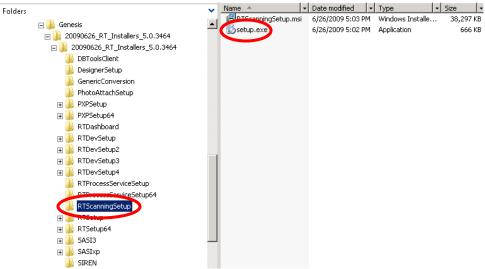
- 5000i
- EZData
- OpScan iNSIGHT 2
- OpScan iNSIGHT 4
- OpScan 2
- OpScan 3
- OpScan 4 or 4U
- OpScan 5 or 6
- OpScan 7 or 8
- OpScan 10
- OpScan 21
- OpScan 9010M or 9020M

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

INSTALLING THE SCANNING SOFTWARE

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

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



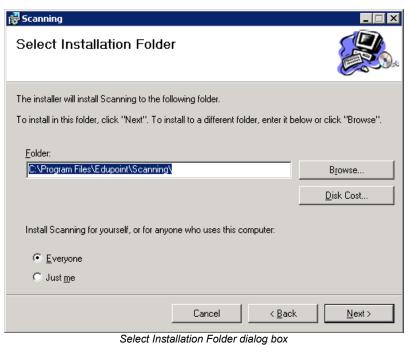
RTScanningSetup Folder

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

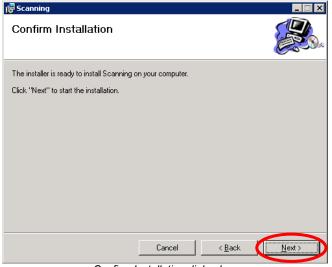


Welcome to the Scanning Setup Wizard dialog box

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



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



Confirm Installation dialog box

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

🙀 Scanning			
Installing Scanning			
Scanning is being installed.			
Please wait			
	Cancel	< <u>B</u> ack	<u>N</u> ext >

Installing Scanning dialog box

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

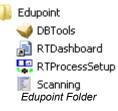
🙀 Scanning	
Installation Complete	
Scanning has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical updates to the .NET Frame	ework.
Cancel < <u>B</u> ack	Close

Installation Complete dialog box

SCANNING THE SHEETS

To scan sheets:

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



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

1.11	Scanning - [Scar Wiza	ard]	
/	File Help		
	Start Scanning		
	Options Close	Enter Sheet Can Sheet Carameters	can
		sis or Gensea user name and password. If you don't have a username or password or please contact your system administrator.	
	User Name		
	Password [
		Login	
		File Menu	

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

Options	×
Scanner Settings	
Scanner OpScan 5 or OpScan 6 Port Com Port Number 1	
Mark Threshold 0 🚍 Discrimination Threshold 0 🚍	
Lest Scanner Connection	
Application Services URL http://localhost/	
Verify Before Update	
<u>S</u> ave <u>C</u> lose	//

Scanning Options

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

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

Save 🗙
Save complete!
OK

Save Confirmation Message Box

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

F File Help	<u>n</u> ×
Login Select Scan Sheet Carl Enter Sheet Parameters Scan Login using your Genesis or Gensea user name and password. If you don't have a username or password or have forgotten them, please contact your system administrator.	
User Name	
Password	
Login	
Ready Not Logged In	//.

Logging in to the Scanning Software

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

	nning - [Scan	Wizard]			
🗐 File	Help				_ 8 ×
Se	Login lect that modul pase contact yo	Select Scan Sheet () le and scan sheet you wish to scan. If you d our system administrator.			
	ielect Scan Sh Module Sheet Type	eet Attendance Attendance 1 Week Next >			
Ready	Admin User	Organization Name: Hope High School	Organization Year: 2009	Don't Show Inactives	1.
			Select Scan Shee	et	

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

🧾 Scanning - [Scan Wiz	ard]			_ D ×
🗾 File Help				_ B ×
I Login Enter the scan sheet p	Select Scan Sheet 🔤	Enter Sheet Paramete	ers 💦 Scan	
Select a date range Start Date	10/25/2009 💌 End Date	10/25/2009 🔽	an	
Ready Admin User Or	ganization Name: Hope High School Enter She	Organization Year: 2009 et Parameters. A	Don't Show Inactives	/

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

📕 Scanning - [Scan Wizard]	
File Help	_ B ×
📁 Login Select Scan Sheet 🗨 Enter Sheet Parameters 💦 Scan	
Enter the scan sheet parameters and click scan	
Select Grading Period Grading Period Quarter Exam Semester	Scan
Ready Admin User Organization Name: Hope High School Organization Year: 2009 Don't Show Inactives	1.

FiEnter Sheet Parameters, Grading

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

Note – Information from Attendance scan sheets does not overwrite existing absence codes in Synergy SIS. However, information from Grading scan sheets does overwrite any marks already in Synergy SIS.
 You can add new students to an Attendance scan sheet by writing

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

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

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

MANAGING THE SCAN SHEETS

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

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

To manage the Attendance sheets:

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

ΥA	ttendance Scan	Sheet Backup					(
Orgar	ization Name: Hope High S	chool					
Atten	Idance						
Organ	ization Name		Restore Sheet				
Hope	High School						
NOTE	: To restore previous Attend	lance Scan Sheets: Select	a row in the "Previou	s Scan Sheet" (grid. Then click the '	"Restore Sheet" butto	on.
Curre	nt Sheets Valid For Scannin	g					
×	Line	Date Range		Sheet Range		Name	lamo
	Start Date	End Date		Start	End	Maine	
	1 04/27/2009	05/08/2009		3	3		
	2 05/04/2009	05/15/2009		2	2		
Previ	ous Scan Sheets (for restori	ng only)					
Date Range					Sheet Range		
Line	Start Date	End Date		Start	End	Name	
1	04/27/2009	05/01/2009		1	1		

Attendance Scan Sheet Backup Screen, Organization Info

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

∀Attendance Scan	Sheet Backup				~
Organization Name: Hope High S	School				
Attendance					
Organization Name	Restore Sheet				
Hope High School					
NOTE: To restore previous Atten	dance Scan Sheets: Select a row in the "Previous S	Scan Sheet" grid. Then click t	he "Restore Sheet" butt	on.	
Current Sheets Valid For Scannin	ng				٨
× Line	Date Range		Sheet Range	Name	
Start Date	End Date	Start	End	Name	
1 04/27/2009	05/01/2009	1	1		
Previous Scan Sheets (for restori	ing only)				(
Line	Date Range		Sheet Range	Name	
Line Start Date	End Date	Start	End	Name	
1 05/04/2009	05/15/2009	2	2		
2 04/27/2009	05/08/2009	3	3		

Attendance Scan Sheet Backup Screen, Restoring

To manage the Grading sheets:

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

♥Grading Scan Sheet Backup				¢		
Organization Name: Hope High School						
Grade Report Sheets Progress Report Sheets						
Organization Name						
Hope High School						
NOTE: To restore previous Grade Scan Sheets: Select	a row in the "Previous Si	an Sheet" grid. Then	click the "Restore	Sheet" button.		
Restore Sheet						
Previous Scan Sheets (for restoring only)				۵		
Line Grade Period			Sheet Range			
		Start	End			
1 Fourth Quarter		1	1175			
2 Fourth Quarter		1176	3248			
Current Sheets Valid For Scanning				Show Detail 🔇		
Line Grade Period		Sheet	Range			
	Start		End			
1 Fourth Quarter	3249		4546			

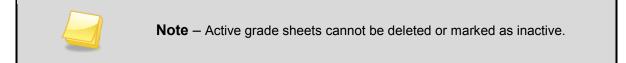
Grading Scan Sheet Backup Screen, Grade Report Sheets

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

♥Grading Scan Sheet Backup				«		
Organization Name: Hope High School						
Grade Report Sheets Progress Report Sheets						
Organization Name						
Hope High School						
NOTE: To restore previous Grade Scan Sheets: Selec	t a row in the "Previ	ous Scan Sheet" grid. T	hen click the "Restore Sheet" button.			
Restore Sheet						
Current Sheets Valid For Scanning				٥		
Line Grade Period		Sheet	Range			
	Start		End			
1 Progress Period 4	rogress Period 4 No Sheets Exist No Sheets Exist					
Previous Scan Sheets (for restoring only)				٨		
Line Grade Period			Sheet Range			
		Start	End			

Grading Scan Sheet Backup Screen, Restoring Progress Report Sheets

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



Chapter Seven: CUSTOMIZING SCREENS

This chapter covers:

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

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

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

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

This XML schema refers to several terms as outlined below:

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

ADDING CUSTOM FIELDS

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

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

Menu 🕶 🔍 🛞 🖉	Find Undo	Add Delete	Form Status: Find 🛛 🖓 🖓
VUser Defined	d Data		«
User Defined BO and Ta	ble:		
Basic Info Properties			
Namespace	Name	DB Table Name	_
Update Information			۵
Last Synch Date Time	Last Changed Date Tim	1e	
Synchronize Database			
NOTE: Clicking the Synd	chronize Database button	h will apply any and all changes m	ade to this user defined table and business object.
Parent Object Relation			0
Name Relation Type			
Other Info			0
Add the change stam	p and user ID tracking		
Query Display Type			
	~		

User Defined Data Screen

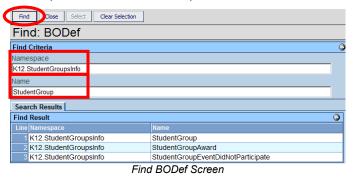
2. In the **Relation Type** list, select whether the new table that will hold the new field has a **One To One** or **One to Many** relationship with the Parent Business Object. It can also be set as a **Master** with a new **Object Name** and **DB Table Name**, with no relationship to an existing business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

Save Close						
User Defined Data Add						
Select the Parent BO of the new user defined data 🤅	٥					
Relation Type Name						
One To One 💌						
Other Attributes (2					
Add the change stamp and user ID tracking						
Query Display Type						
▼						

User Defined Data Add Screen

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

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



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

Find Close Select Clear Selection]
Find: BODef	
Find Criteria	۵
Namespace	
K12.StudentGroupsInfo	
Name	
StudentGroup	
Search Results	
Find Result	(
Line Namesnace	Namo
1 K12.StudentGroupsInfo	StudentGroup
2 K12.StudentGroupsInfo	StudentGroupAward
3 K12.StudentGroupsInfo	StudentGroupEventDidNotParticipate
Find DOF	of Caraan Itam Calastad

Find BODef Screen, Item Selected

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

Save Close						
User Defined Data Add						
Select the Parent BO of the new user defined data	۵					
Relation Type Name 🔶						
One To One V K12.StudentGroupsInfo.StudentGroup						
Other Attributes	۵					
Add the change stamp and user ID tracking						
Query Display Type						
Show and obe						

User Defined Data Add Screen, Screen Selected

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

Save Close		
User Defined Data Add		~
Select the Parent BO of the new user defined data		<u>()</u>
Relation Type Name	DB Table Name STAFF_PERMITS	
Other Attributes		0
Add the change stamp and user ID tracking Query Display Type Show and obe ✓		

User Defined Data Add, One To Many

Save Close					
User Defined Data Add					
Select the Pare	ent BO of the new user	defined data	۵		
Relation Type	Object Name	DB Table Name			
Master 🔽	Staff_Permits	STAFF_PERMITS			
Other Attributes	3		(
🔽 Add the char	nge stamp and user ID	tracking			
Query Display 1	Гуре				
Show and obe	×				
		User Defined Data Ac	ld Master		

User Defined Data Add, Master

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

VUser Defined	Data		æ
User Defined BO and Tab	ole: UD.StudentGroupsInfo.UD	StudentGroup - UD_STU	GROUP
Basic Info Properties			
Namespace	Name	DB Table Name	
UD.StudentGroupsInfo	UDStudentGroup	UD_STU_GROUP	
Update Information			٥
Last Synch Date Time	Last Changed Date Time		
08/04/2009 16:06:00	08/04/2009 16:07:00		
Synchronize Database]		
NOTE: Clicking the Syncl	nronize Database button will appl	ly any and all changes mad	le to this user defined table and business object.
Parent Object Relation			(
Name	Relation Type		
K12.StudentGroupsInfo.	StudentGroup One To One 💌		
Other Info			<u>۞</u>
Add the change stamp	and user ID tracking		
Query Display Type			
Show and obey BO rules	*		

User Defined Data Screen, Table Created

- 9. When the business object is created, the object is added to the XML schema, but the table is not added to the database. Data cannot be entered until the new business object information is added to the database. Click the **Synchronize Database** button to add the table to the database. This synchronization must occur each time a change is made to the screen so that the underlying table is updated. The date and time of the last database synchronization is displayed as well as the last time the object definition was changed. If the **Last Changed Date Time** is later than the **Last Synch Date Time**, the database needs to be synchronized.
- 10. The **Parent Object Relation** section displays the Parent Business Object selected when the table was created, and the relationship between the parent business object and the user-defined object. This information cannot be modified. A one-to-one relation type (the default) means that only one user-defined record can be created for each parent business object record.
- 11. Only the Add the Change Stamp and User ID Tracking and Query Display Type can be changed after the object has been created. If these values change, be sure to click the **Save** button at the top of the screen.

Deleting

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

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

1. Click the **Properties** tab.

VUser Defined Data						
User Defined BO and Table: UD.S	User Defined BO and Table: UD.StudentGroupsInfo.UDStudentGroup - UD_STU_GROUP					
Basic Inf Properties						
Namespace	Name	DB Table Name				
UD.StudentGroupsInfo	UDStudentGroup	UD_STU_GROUP				
Properties/Columns				Add	Show Detail 🔇	
X Line Property Name	\ominus Type 🗧	🗦 🛛 DB Column Name 🛛 🖨	Special Type 🔶	Max Length 🔶	Scroll Order 😂	
T 1 StuGroupGU	Unique Identifier	STU_GROUP_GU				
		to Company Duomos	·· · ·			

User Defined Data Screen, Properties Tab

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

\mathbb{Y}	VUser Defined Data										
Usei	r Defir	ed BO and Table: UD.	Studer	ntGroupsInfo.UDS	Stuc	lentGroup - UD_ST	U_GROUP				
Ba	sic Info	Properties									
Nam	iespac	e	Name	е	DI	3 Table Name					
UD.	Studer	itGroupsInfo	UDS	tudentGroup	υ	D_STU_GROUP					
Pro	pertie	s/Columns							Add	Show Detail	
X	Line	Property Name		Туре		DB Column Name 🔶	Special Type	\Rightarrow	Max Length 🊔	Scroll Order	\Rightarrow
	1	StuGroupGU		Unique Identifier				_			_
	2	Team_Position		String	~	POSITION		*	35	1	*

User Defined Data Screen, Properties Tab, Adding

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



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

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

VUser Def	√User Defined Data								
User Defined BO a	ind Table: UD.Stude	ntGroupsInfo.UDS	ituo	lentGroup - UD_ST	U_GROUP				
Basic Info Prop	erties								
Namespace	Nam	е	DI	B Table Name					
UD.StudentGroups	nfo UDS	itudentGroup	U	D_STU_GROUP					
Properties/Colum	ns						Add	Show Detail	
X Line P	roperty Name 🛛 👙	Туре	⊜	DB Column Name 🔶	Special Type		Max Length 🔶	Scroll Order	¢
🔲 1 StuGrou	pGU	Unique Identifier		STU_GROUP_GU					
🔲 2 TeamPo	sition	String	*	Position		~	35	1	~
🔲 3 Notes		Memo	~	Notes		~		2	*

User Defined Data Screen, Properties Tab, Fields Created

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

Solution V User Defined Data	(«
User Defined BO and Table: UD.StudentGroupsInfo.UDStudent	Group - UD_STU_GROUP
Basic Info Properties	
Namespace DB Ta	ble Name
UD.StudentGroupsInfo UDStudentGroup UD_S1	U_GROUP
Update Information	Q
Last Synch Date Time Last Changed Date Time	
08/04/2009 16:06:00 08/04/2009 16:07:00	
Synchronize Database	
NOTE: Clicking the Synchronize Database button will apply any an	d all changes made to this user defined table and business object.
Parent Object Relation	<u>ې</u>
Name Relation Type	
K12.StudentGroupsInfo.StudentGroup One To One	
Other Info	۵
Add the change stamp and user ID tracking	
Query Display Type	
Show and obey BO rules	

User Defined Data Screen, Synchronize Database

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

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

User Defined BO and Table: UD.UDStude	nt - UD_STU						
Basic Info Properties							
Namespace Name		DB Table Name	_				
UD	lent	UD_STU					
Properties/Columns					Add	Hide Detail	2
Line Property Name	Type: String						
1 Password	Attributes						
2 StudentGU	Property Name	DB Column Name	Туре				
3 Username	Password	PASSWORD	String	~			
	Definition Mandatory Spr Text Mode Display Label Password Default Value Display Length Read Only	Short La	abel				

Detail View, Properties Tab

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

When customizing a lookup field:

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

V.	lser Defined Data	a				«
User I	Defined BO and Table: UD.I	JDStaff_Permits - UD_S	TAFF_PERMITS			
Basi	c Info Properties					
	space	Name	DB Table Name			
UD		UDStaff_Permits	UD_STAFF_PERMIT	S		
Ргор	erties/Columns				Ado	d 🛛 Hide Detail 🔕
Line	Property Name	Type: Lookup				
1	AddDateTimeStamp	Attribute Value	List			
2	AddIDStamp	Property Name	DB Column Name	Туре		
3	ChangeDateTimeStamp	PermitType	PERMIT_TYPE	Lookup	~	
4	ChangelDStamp	Definition				<u>()</u>
5	PermitDate	Mandatory Looku	p Display		Мах	Length
6	PermitType				✓ 15	
7	StaffSchoolYearGU	Display			,	
8	UDStaff_PermitsGU	Label	Short Lab	iel		
		PermitType	PermitTyp		_	
		Default Value	, ,			
		Read Only				
		_	alun Cort			
		Lookup Width Lo	ookup Sort			
			×			

Detail View, Properties Tab

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

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

VUser Defined Data	l			(«
User Defined BO and Table: UD.UDStaff_Permits - UD_STAFF_PERMITS				
Basic Info Properties				
Namespace	Name	DB Table Name		
UD	UDStaff_Permits	UD_STAFF_PERMITS	s	
Properties/Columns				Add Hide Detail 🔇
Line Property Name	Type: Lookup			
1 AddDateTimeStamp	Attribute Value	List		
2 AddIDStamp	Property Name	DB Column Name	Туре	
3 ChangeDateTimeStamp	PermitType	PERMIT TYPE	Lookup	
4 ChangelDStamp	, <u>, , , , , , , , , , , , , , , , , , </u>	, -	· · ·	create your own value list. If
5 PermitDate			ed as a high preceden	
6 PermitType	Lookup Name 🔶			
7 StaffSchoolYearGU				
8 UDStaff_PermitsGU	Value List			Add 🕥
	X Line C	Drder 🔤	Code 🔤	Description 🔶

Value List Tab, Properties Detail, User Defined Data Screen

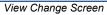
- 11. To use an existing lookup table listed in the **Lookup Table Definition** screen, click the gray arrow next to **Lookup Name**.
- 12. To use a new table, click the Add button in the Value List section.
- 13. Enter the sort order in the **Order** column, a **Code** for the value, and a **Description**.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

CHANGING SCREENS

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

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

View Change		a
View Name: Localization:		
Modifications Other Info		
Namespace	Name	Туре
		▼
View Modifications		Action 👻 🔇



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

Menu 🗸 🔇 🍳 🃎 🖏 🤅 🚺	Undo Add Delete	Status: Find 🔊 🖓 🍋
View Change		«
View Name: Localization:		
Modifications Other Info		
Namespace	Name	Туре
К12	Student Group	×
View Modifications		Action 🔻 🔇

View Change Screen, Finding

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

View Change		(
View Name: K12.StudentGroups	Info.Student Group Localization:	
Modifications Other Info		
Namespace	Name	Туре
K12.StudentGroupsInfo	Student Group	Data Entry 🕑
View Modifications		Action 🔻 🔇
🔺 鬥 TitleArea		
🕨 👌 TabGroup		

View Change Screen, Student Group

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

View Change				~
View Name: K12.StudentGroupsInfo.St	tudent Group	Localization:		
Modifications Other Info				
Namespace	Name		Туре	
K12.StudentGroupsInfo	Student Grou	р	Data Entry	~
View Modifications		Action	•	٨
TitleArea TabCroup TabCroup TabPanel Tab - General Information Tab - Eligibility Tab - Eligibility Tab - Additional Information Tab - Health Screens	(Action Add CheckBoxList to Tab - Addit Add Field to Tab - Additional Info Add Field to Tab - Additional Info Add Groupbox to Tab - Additional	mation rmation	

View Change Screen, Adding a Field

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

Save Close		
Add Contr	ol	(«
Business Object	Property	
UDStudent Group	 TeamPosition 	×
	Add Control Screen	1

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

∀View Change						(
View Name: K12.StudentGroupsInfo.Stude	ent Group Localization: AZ.ESD					
Modifications Other Info						
	Name		Туре			
K12.StudentGroupsInfo	Student Group		Data Entry	*		
View Modifications		Act	tion		•	٥
TitleArea	Data Field					
♥ ♥ TabGroup ■ TabPanel	Field Data					0
Tabranei Tabranei Tabranei Tabranei	BO Name	Prop	perty Name	BOID		
Tab - Eligibility		Posi	ition	2A2C6CAA-4	79C-4EEA-9	
Tab - Eligibility Detail Tab - Awards Tob - Awards Position Notes	Label Team Position Label Orientation Top V ReadOnly Width 200 Suppress Label Text Mode Single Line V					

View Change Screen, Field Data

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

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

Team Position
Left Label Orientation
Team Position
Top Label Orientation
J Team Position
Bottom Label Orientation
Team Position
Right Label Orientation

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



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

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

∀View Change			(«		
View Name: K12.StudentGroupsInfo.Stude	/iew Name: K12.StudentGroupsinfo.Student Group Localization: AZ.ESD				
Modifications Other Info					
Namespace	Name				
K12.StudentGroupsInfo	Student Group				
View Modifications		Action			
▶ 🗐 TitleArea ▼ 崎 TabGroup	Data Field	Action Delete Position from	Tab - Additional Information		
TabPanel	Field Data				
Table General Information	BO Name	Property Name	BOID		
🕨 🗀 Tab - Eligibility		Position	2A2C6CAA-479C-4EEA-9		
 Tab - Eligibility Detail Tab - Awards Tab - Awards 	Label Team Position				
➡ Tab - Additional Information	Label Orientation Top				

Removing a Field from A Screen

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

√Student						
Student Name: Abb	ott, Billy C. School: Hope	e High School Home	eroom: 215	Teacher: Wiscl	nhusen, T. Cust	tody!
Demographics P	arent/Guardian Other Ir	nfo Emergency	Enrollme	ent Enrollme	ent History 🕴 Cla	asses Documents
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	💌 Male 💌
Title Area Example						

The entire Title Area can be hidden:

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

View Change						
View Name: K12.Staff Localization: AZ.ESD						
Modifications Other Info						
Namespace	Name	Туре				
K12	Staff	Data Entry	~			
View Modifications		Action	- 🔕			
TitleArea	itle Area					
TabGroup	Hide existing Title Area controls					

Hiding Title Area

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

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

1. Click the **Title Area**.

View Change						
View Name: K12.Staff Localiz	ation: AZ.ESD					
Modifications Other Info						
Namespace	Name	Туре				
K12	Staff	Data Entry	¥			
View Modifications		Action	- 🔇			
TitleArea	Title Area	Action	_			
CabGroup	Hac Area	Add TitleField to Title	eArea			
	Hide existing Title Area contr	rols				

Adding a Field to the Title Area

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

Save Close				
Add Contr	ol			
Business Object		Property		
Student	¥	ChangeDateTimeStamp	¥	
		Add Control Scr	een	

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

√Student						
Student Name: A	bbott, Billy C. School: Hope	High School Home	eroom: 215 T	leacher: Wisc	hhusen, T. <mark>Cust</mark>	ody Date Changed: 10/10/20
Demographics	Parent/Guardian Other Inf	Emergency	Enrollmen	t Enrollm	ent History Cla	asses Documents
Last Name	First Name	Middle Name	Suffix	Perm ID	Grade	Gender
Abbott	Billy	C		905483	12	💌 Male 💌
		Field Added	to Title A	Area	_	

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

∀View Change				(e		
View Name: K12.StudentGroupsInfo.Studen	t Group Localization: AZ.ESD					
Modifications Other Info						
Namespace Na	me		Туре			
K12.StudentGroupsInfo St	udent Group		Data Entry	*		
View Modifications		Act	ion	▼ ◊		
ChangeDateTimeStamp	Title Area					
	Field Data			٥		
raborodp	BO Name	Prop	erty Name			
		Char	ngeDateTimeStamp			
	BOID					
	C1B9A1C4-8D9F-41B3-A2DC-02DC9DCFDFA7					
	Label					
Changing the Field Label						

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

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

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

♥Student							
Student Name: At	bott, Billy C. School: Hope	High School Home	eroom: 215 Tea	icher: Wischhusen, T.	Custody!		
Demographics	Parent/Guardian Other Ir	fo Emergency	Enrollment	Enrollment History	Classes	Documents	3
Last Name	First Name	Middle Name	Suffix P	erm ID Grad	le	Gender	Username
Abbott	Billy	C	9	05483 12	~	Male 🛛 🔽	

The Tab Panel

To add a field to the Tab Panel:

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

✓View Change			(«
View Name: K12.StudentGroupsInfo.Stud	lent Group Localization: AZ.ESD		
Modifications Other Info			
Namespace	Name	Туре	
K12.StudentGroupsInfo	Student Group	Data Entry 🗸	
View Modifications		Action	• •
TitleArea		Add Field to TabPanel	1
TabGroup		Add Field to Fabrianer	
TabPanel Tab - General Information			
Tab - Eligibility			
🕨 🗀 Tab - Eligibility Detail			
🕨 🗀 Tab - Awards			
🕨 🚞 Tab - Additional Information			

Adding a Field to the Tab Panel

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

Save Close				
Add Contr	ol			(
Business Object		Property		
Student	¥	ChangeDateTimeStamp	¥	
Add Control Screen				

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

Student								
Student Name: A	bbott, Billy C. School: He	ope High School Home	eroom: 215 Te	acher: Wischh	iusen, T. <mark>Custa</mark>	dy!		
Demographics	Parent/Guardian Other	r Info Emergency	Enrollment	Enrollmen	t History 🛛 Cla	sses Di	ocument	s
Last Name	First Name	Middle Name	Suffix P	erm ID	Grade	Ge	nder	Username
Abbott	Billy	C	- J	05483	12	💽 Ma	ale 🔥	
Field Added to Tab Panel								

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

View Change				
View Name: K12.Student Localization: AZ.ESD				
Modifications Other Info				
	Name	Туре		
K12	Student	Data Entry	×	
View Modifications		Action		
TitleArea	Data Field			
V C TabGroup	Field Data		0	
a Username	BO Name	Property Name	BOID	
and a Demographics		Username	B324F245-CF53-43F8-A75	
🕨 🗀 Tab - Parent/Guardian	Label			
🕨 🗀 Tab - Other Info	Username			
Tab - Emergency	Label Orientation			
Tab - Enrollment Image: Tab - Enrollment History	Тор 💌			
Tab - Classes	ReadOnly			
Tab - Documents	Default 🗸			
Tab - Student Contact Log	Width			
	Suppress Label			
	-			
	Text Mode			
	Single_Line	-		

Changing the Field Information

- 5. Make any changes to the default settings for the field, and click the **Save** button at the top of the screen. These are the same settings available when adding a field to a tab as outlined previously in this section of the guide.
- 6. To remove a field added to the Tab Panel, click the **f**ield name and then select **Delete Field Name from TabPanel** from the **Action** list.

√View Change					(9
View Name: K12.Student Localization: AZ.ESD					
Modifications Other Info					
Namespace	Name		Туре		
K12	Student		Data Entry	~	
View Modifications		Act	tion		• •
▶ 🗒 TitleArea	Data Field		ion ete Username fi	rom TahPanel	
V CabGroup	Field Data		ete obername n	form rubr uner	
Username	BO Name	Prop	erty Name	BOID	
lab - Demographics		User	mame	B324F245-	CF53-43F8-A75
🕨 🗀 Tab - Parent/Guardian	Label				
Tab - Other Info	Username				
Tab - Emergency Image: Tab - Enrollment	Label Orientation				
Tab - Enrollment History	Тор 🔽				
Tab - Classes	ReadOnly				
Tab - Documents	Default 💌				
Tab - Student Contact Log	Width				
	Suppress Label				
	Text Mode				
	Single_Line 🕑				

Removing a Field from the Tab Panel

You can add an entire tab to a screen:

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

View Change					
View Name: K12.Student Localization: AZ.ESD					
Modifications Other Info					
Namespace	Name	Туре			
K12	Student	Data Entry			
View Modifications		Action 🔽 🛇			
		Action Add TabNew to TabGroup			

Adding a New Tab

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

Save Close	
Add Tab	
New Tab Name	
District	
Organization Type	
Org_Year_Qualified 🛛 🖌	
Include In Add Wizard	
No 🔽	
	Add Tab Caraan



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

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

Login Information	I		()
Username	Password		
L		Group Box	

To add a group box to a tab:

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

√View Change				(
View Name: K12.Student Localization: A	Z.ESD			
Modifications Other Info				
Namespace	Name		Туре	
K12	Student		Data Entry	*
View Modifications		Ac	tion	
🕨 鬥 TitleArea		Act	ion	
TabGroup			I GroupBox to Tab - Demogra	
TabPanel			Gild to Tab - Demogra	
Tab - Demographics				
Tab - Parent/Guardian				
Tab - Other Info				
Tab - Emergency				
Tab - Enrollment				
Tab - Enrollment History				
Tab - Classes				
Tab - Documents				
Tab - Student Contact Log				

Adding a Group Box

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

Save Close	
Add Group Box	~
Label	
Login Information	
Add Group Box Screen	

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

∀View Change				(
View Name: K12.Student Localization: AZ.ESD				
Modifications Other Info				
Namespace	Name		Туре	
K12	Student		Data Entry	*
View Modifications		Action		▼ ◊
 TitleArea TabGroup TabPanel Tab-Parent/Guardian Tab - Parent/Guardian Tab - Parent/Guardian Tab - Classes Tab - Classes Tab - Documents Tab - Student Contact Log 	Groupbox Label Login Information Width	-		

Specifying the Width of a Group Box

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

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

To add a grid:

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

∀View Change		(«
	Name Staff	Type
View Modifications	Tab New Tab Name	Action Action Add GroupBox to TabNew - Parking Permits Add Field to TabNew - Parking Permits
▶ 🔄 Tab - General ▶ 🔄 Tab - Schools ▶ 🔄 Tab - SpecialEd	Parking Permits Organization Type Default	Add Grid to TabNew - Parking Permits Delete TabNew - Parking Permits from TabGroup
 Tab - Emergency Tab - Credentials TabNew - Parking Permits 	Include In Add Wizard	

Adding a Grid

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

Save Close		
Add Grid		~
Label	Primary Object For Grid	
	×	
	Add Grid Screen	

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

∀View Change				(«
View Name: K12.Staff Localization: AZ.ESD				
Modifications Other Info				
Namespace	Name		Туре	
K12	Staff		Data Entry 🔽	
View Modifications		Action		• •
	Grid Primary Object For Grid UDPermits (UD) I♥ Show Add I♥ Show Delete I■ Show Detail	~		
	Viewing Crid Pror			

Viewing Grid Properties

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

View Change			(«
View Name: K12.Staff Localization: AZ.ESD			
Modifications Other Info			
Namespace	Name	Туре	
K12	Staff	Data Entry	~
View Modifications		Action	
▶ 📴 TitleArea ▼ 🍪 TabGroup	ſ	Action Add GridField to GridCol	
 TabGroup TabPanel 	L		
🕨 🚞 Tab - General			
🕨 🚞 Tab - Schools			
Tab - SpecialEd			
Tab - Emergency			
Tab - Credentials TabNew - Parking Permits			
Cride Permits			
GridCol			
➡ GridSort			

Adding Fields to a Grid

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

Save Close	
Add Control to Grid	<
Property	
✓	
Add Control to Grid Screen	

- 7. Click the **Save** button at the top of the screen.
- 8. Select **Add GridField to GridCol** from the **Action** menu again, and continue adding columns.
- 9. Once all of the columns have been added, modify the display of the columns by clicking the name of the added column.

View Change			«
View Name: K12.Staff Localization: AZ.ESD			
Modifications Other Info			
Contract of the second s	lame	Туре	
K12	Staff	Data Entry 💌	
View Modifications	Actio	n	• •
TitleArea	Dropdown		
▼ 🍪 TabGroup ▶ 🗍 TabPanel	Field Data		۵
Tab - General	BO Name	Property Name	
🕨 🗀 Tab - Schools	UD.UDPermits	PermitType	
Tab - SpecialEd	BOID		
Tab - Emergency Tab - Credentials	67FFCB0D-D977-4FC0-B347-0958C	D80B7D5	
Tab - Credenitars TabNew - Parking Permits	Label		
Grid - Permits			
	Label Orientation		
- Fermicode	~		
PermitType	ReadOnly		
ab Permitte	· · · · · · · · · · · · · · · · · · ·		
▼ GridSort	Width		
 PermitDate 			
	Suppress Label		
	Drop Down Display		

Customizing Grid Columns

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

√View Change					~
View Name: K12.Staff Localization: AZ.ESD					
Modifications Other Info					
	Name		Туре		
K12	Staff		Data Entry	×	
View Modifications		Action			•
🕨 📴 TitleArea		Action Add GridSortFi	ald to OvidPast		
🗢 🏀 TabGroup		Add GhdSuttFl	ela lo Ghason		-
TabPanel					
Tab - General					
Tab - Schools					
Tab - SpecialEd					
Tab - Emergency Tab - Credentials					
Table Credentials Table Credentials Table Credentials					
Grid - Permits					
✓ GridCol					
ab PermitDate					
PermitType					
at remaitNo					
GridSort					

Adding a Sort Field to a Grid

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

Save			
Add Sort to Grid			«
Property	Ascending		
	~	~	

Add Sort to Grid Screen

- 12. Click the **Save** button at the top of the screen.
- 13. Once a sort field has been added, modify the order of the sort by clicking on the sort field. Additional sort fields can also be added.

∀View Change			(«
View Name: K12.Staff Localization: AZ.ESD			
Modifications Other Info			
	Name	Туре	
K12	Staff	Data Entry 😽 😽	
View Modifications	4	Action	• •
 TitleArea TabOroup TabPanel Tab - General Tab - Schools Tab - Schools Tab - SpecialEd Tab - Credentials Tab - Credentials Grid - Permits Grid Col PermitDate PermitDate GridSort GridSort 	Sort Property Field Data Property Name PermitDate Ascending Descending		•

Viewing Sort Field Properties

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

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

♥PAD Security	(<
Product Access Definition	
Global Access 🔇	Administrator
View Access Report Access Audit Access	User Name 🔶
Yes 💙 Yes 💙 Yes 💙	User, Admin
Navigation Security	
Product Access Definition Security	۵
▶ ESD	
▶ Genesea	
Genesis	

PAD Security Screen

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

♥PAD Security	
Product Access Definition	
Global Access 🔇	Administrator 3
View Access Report Access Audit Access Yes Yes Yes Yes Yes	User Name 🔶
Navigation Security	
Product Access Definition Security	Q
ESD .	
上 Genesea	
- Jenesis	
Attendance	
Reports Daily	
Reports Period	
Scanning	
Setup	
📨 Attendance Letter	
Attendance Verification	
Class Daily Attendance	
Class Period Attendance	
PAD Secu	irity Screen, Expanded List

3. Click the screen or report.

♥PAD Security					
Product Access Definition		_			
Global Access 🔷	Administrator				
View Access Report Access Audit Access	Jser Name 🔶				
Yes 💙 Yes 💙 Yes 💙	<u>User, Admin</u>				
Navigation Security					
Product Access Definition Security					
ESD	lame: K12.Atte	ndanceInfo.ClassDailyAttenda	ance		
Genesea	/iew Substitutio				
▼ Genesis	new Substitutio				
Reports	/iew Name Ove	rride			
Reports Daily					
Reports Period	Group Access	User Access			
Scanning	Access				Show Detail (
▶ Setup	Line	User Group Name 🚔	Access	e l	Audit Access
Xttendance Letter	1 Public		Access		Addit Access
Mandance Verification					
Class Daily Attendance	2 Role - Ad		*		*
Class Daily Alteridance	3 Role - Ass	sistant Principal	*		*
Class Period Allenuance	4 Role - Ass	sistant Superintendant	~		~
Course Attendance	5 Role - Atte	endance Daily	~		*
Daily Attendance	6 Role - Cle	<u>erk</u>	~		~

PAD Security Screen, Renaming a Screen

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

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

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

Security De	efinitio	n		(
Security Definition				
Global Access	۵	Property Access 🔇	Audit Trail 🛛 🔇	Administrator 🔇
Update Add [Delete	All Properties	Enable Default Audit Option	User Name 🔶
Update 💌 Yes 💌 🤅	Yes 🔽	Update 💌	🔽 🛛 Full audit trail (add/update/c 💙	User, Admin
Security Access				
Business Objects				<u>ې</u>
K12				
Revelation				
DU 🚺				
ZClient				
		S	ecurity Definition Screen	

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

♥Security	Definitio	n		
Security Definit	ion			
Global Access	٨	Property Access 🔇	Audit Trail	Administrator
Update Add	Delete	All Properties	Enable Default Audit Option	User Name 🔶
Update 🖌 Yes	👻 Yes 👻	Update 💌	Full audit trail (add/update/	e/c 🕶 User, Admin
Security Access				
Business Objects	5			<u>۞</u>
 Accommodati Addressinfo 	ionInfo			
AttendanceInf	io			
AXPInfo				
▶ AZ				
D CA				
CareerPlanin	fo			
-		Security Defin	nition Screen, Locating E	Business Properties

4. Click the business property to be modified.

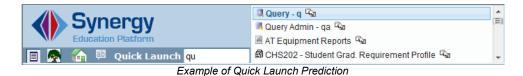
VSecurity Definitio	n								
Security Definition									
Global Access	Property Access 🕥	Audit	Trail 🔇		Administrator		(3	
Update Add Delete	All Properties	Enable	e Default Audit Option	1	User Name 🔶			7	
Update 💙 Yes 💙 Yes 💙	Update 👻		Full audit trail (add/update/c 💙		User, Admin				
Security Access								_	
Business Objects									6
 ▼ K12 ▶ AccommodationInfo ▶ Addressinfo ▶ AttendanceInfo ▶ AXPInfo ▶ A7 	5	Audit O Gubstitu	K12.Student ption ting Validation BO Access Group Property Acces	s	~	User Propert	ty Access		
CA	i i i	Permis	sions				-		0
CareerPlaninfo		Line	User Group Name 🗧		Update (Add		Delete	
Census		1 <u>P</u>	ublic		~		~		~
ClassBoardInfo		2 <u>R</u>	ole - Admin		~		~		~
 ConferenceInfo CourseHistorvInfo 		3 R	ole - Assistant Principal		~		~		~
Courseinfo		4 <u>R</u>	ole - Assistant Superintendant		~		~		~
CTE		5 R	ole - Attendance Daily		~		~		~
	Co ou with a Da	5 <mark>R</mark>			~				

Security Definition Screen, Group Access Tab

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

CUSTOMIZING QUICK LAUNCH ABBREVIATIONS

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



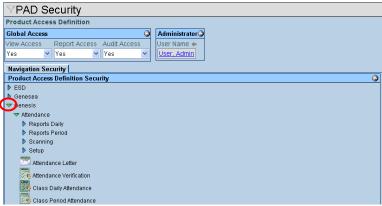
You can also configure abbreviations so even fewer keystrokes are required. To set a quick launch abbreviation:

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

♥PAD Security	(«
Product Access Definition	
Global Access 🔇	Administrator
View Access Report Access Audit Access	User Name 🗧
Yes 💙 Yes 💙 Yes 💙	User, Admin
Navigation Security	
Product Access Definition Security	۵
ESD ESD	
Genesea	
Genesis	

PAD Security Screen

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



PAD Security Screen, Expanded List

3. Click the screen or report.

Product Access Definition			
Global Access	Administrator		
View Access Report Access Audit Access	User Name 🔶		
Yes 👻 Yes 👻 Yes 👻	User. Admin		
Navigation Security			
Product Access Definition Security			
ESD ESD	Name: K12.AttendanceInfo.ClassDailyAttendance	e	
▶ Genesea ▼ Genesis	View Substitution Quick Launch Text		
✓ Genesis ✓ Attendance			
Reports	View Name Override		
Reports Daily		-	
Reports Period	Group Access User Access		
 Scanning Setup 	Access		Show Detail
Attendance Letter	Line User Group Name 🔶	Access 👙	Audit Access
Attendance Letter	1 Public	~	~
Res	2 Role - Admin	*	~
Class Daily Attendance	3 Role - Assistant Principal	~	~
Class Period Attendance	4 Role - Assistant Superintendant	~	~
Course Attendance	5 Role - Attendance Daily	~	~
Daily Attendance	6 Role - Clerk	~	

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

MODIFYING EXISTING FIELDS (PROPERTIES)

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

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

	«
Property Override	
Property Override K12	
Revelation	
▶ ZClient	
Bus a set of Orac midd	

Property Override Screen

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

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

Property Override		_
▼ K12	Current	0
▼ K12.AddressInfo	Туре	
AddressChoice	String	
AddressChoiceGrid		
AddressChoiceGridGU	Label Short Label Display Length Default Value Mandatory	
AddressChoiceGU	State 2 NO	
 City 		
 City GridGU 	Override	3
	Override Label	٩
G GridGU		٢
 GridGU IncomingAddressNumber 	Label	٢
 GridGU IncomingAddressNumber SchoolName 		<u></u>
GridGU IncomingAddressNumber SchoolName State	Label	٦
GridGU IncomingAddressNumber SchoolName State StreetAddIncrement	Label	٦
 GridGU IncomingAddressNumber SchoolName State StreetAddincrement StreetAddress 	Label Short Label Display Length	٢

Modifying a Property

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

CHANGING A REPORT INTERFACE

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

To change a report interface:

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

Menu 🗸 🔇 🌒 🛞 🖾 🖉 🕅 Ur	ndo	Stat	us: Ready 💫 🖓 🚳
Namespace: Number: Name:			
Modifications			
Namespace	Number	Name	
	J	J	
Report Interface Modifications Action 🔽 🖓			Action 💌 🔇

Report Interface Change Screen

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



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

Save Close	
Add Tab	~
Attributes	٨
Label	
Layout Order	
Adding a Tab	

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

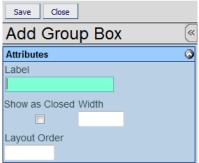
✓Report Interface Change							
Namespace: UD Number: U-STU401 Name: My	Student List						
Modifications							
Namespace	Number	Name					
UD	U-STU401	My Student List					
Report Interface Modifications		Action	- 📀				
🔝 🔁 Tab - Options							
🗢 📜 New Tab - New Custom Tab							

Report Interface Change Screen, Selecting Object to Modify

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

Action
Add Group Box to Tab - Options
Add Static Text to Tab - Options
Add Line Break to Tab - Options
Add Field to Tab - Options
Add Layout Table to Tab - Options
Selecting Modification

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



Example Screen for Adding an Object

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

Report Interface Modifications				
▼ 🛅 Tab - Options				
🤝 🏧 Group Box - Group Box				
🤝 📰 Layout Table				
🤝 📃 Layout Column				
BirthState				
🤝 📃 Layout Column				
ab BirthYear				
A Static Text				
Report Interface Modifications				

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

∀Rep	ort Inte	rface					(«
Name: My	Student Li	st Number	: U-STU401 P	age Orientation:	Portrait		
Options	New Custon	n Tab S	ort / Output	Conditions	Selection	Advanced	
Report D	escription:						
Student I	nfo						0
Perm ID							
Last Name	е	First N	lame				
Grade							
	~ -		~				
Group Bo	x						0
Birth State	е	Birth Yea	ar				
	*						
Static Tex	xt						

Result of Report Interface Modifications

DEFINING SCREEN EVENTS

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

∇S_{2}	ystem Conf	igurati	ion		(«
Syste	em Configuration	n			
Secur	rity Options Adv	/anced			
Globa	al Events				Add 🕥
×ц	_ine Event		Name	V	iews to Monitor
		\checkmark	Name	Views with Primary BO	Specific View (blank = all views)
	1 AfterRead	*	K12.Setup.StudentNotification +	K12.Student ←	+
lcons					Add 🔇
XL	_ine	lcon l	Name 😂	File Name	⊜ Icon
			D <i>i</i> <i>i i i i</i>		

Predefined View Events

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

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

∇	Sys	tem Config	gurat	ion		(«	
Sys	tem	Configuration					
Sec	curity	Optio S Adva	nced 📘				
Glo	bal Ev	vents				Add 🕥	
×	Line	Event		Name	Views to Monitor		
	Line	Even		Name	Views with Primary BO	Specific View (blank = all views)	
	1	AfterRead	*	K12.Setup.StudentNotification +	K12.Student 🗲	+	
Icor	ıs					Add 🔇	
X	Line		lcon	Name 🔤	File Name	⊜ Icon	

Advanced Tab, System Configuration Screen

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

∇	Sys	tem Config	gur	ati	ion		(«
System Configuration							
Security Options Advanced							
Global Events Add							
X Line Event				ews to Monitor			
\cap		Lycin			name	Views with Primary BO	Specific View (blank = all views)
	1	AfterRead	*		K12.Setup.StudentNotification +	K12.Student 🖛	+
	2		*		+	+	+
					Adding a New F		

Adding a New Event

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

- AfterRender After a screen is displayed
- AfterUpdate After a record is updated
- BeforeDelete Before a record is deleted from a screen
- BeforeFind Before the results of a Find search is displayed
- BeforeFKRender Before a grid in a screen is displayed
- **BeforeInsert** Before a new record is added
- BeforeRead Before a record is displayed
- BeforeRender Before a screen is displayed
- **BeforeUpdate** Before a record is updated
- 4. Select the business object that should be started when the event happen,s by clicking the gray arrow in the **Name** column.
- 5. In the **Find: BODef** screen, enter all or part of the **Namespace** and/or **Name** of the business object, and click the **Find** button.

Find Close Select Clear Selection	
Find: BODef	
Find Criteria	۵
Namespace	
Name	
J	
Search Results	
Find Result	
Line Namespace	Name

Find BODef Screen

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

Find Close Select Clear Selection	
Find: BODet	
Find Criteria	
Namespace	
rev	
Name	
Search Results	
Find Result	۵
Line Namespace	Name
1 Revelation	AutoSequence
2 Revelation	BODef
3 Revelation	BOObjectProp
4 Revelation	BOTree
5 Revelation	BOV/alidationOverride
6 Revelation	ButtonConfirmation

Selecting the Business Object

7. Select which screens to apply this event to. Screens can be selected by their primary business object, or a specific screen can be selected, or both. For example, if the K12. Student object is selected as the primary business object, the event will apply to all screens in which the student is listed at the top of the screen.

\mathbb{Y}	VSystem Configuration								
Sys	System Configuration								
Se	Security Options Advanced								
Glo	bal E	vents					Add 🔇		
×	X Line Event ⇔ Name					Views to Monitor			
		Event			IN dille	Views with Primary BO	Specific View (blank = all views)		
	1	AfterRead	*		K12.Setup.StudentNotification +	K12.Student 🖨	+		
	2	AfterUpdate	~		Revelation.ButtonConfirmation +	+	¢		

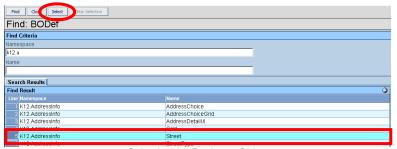
Business Object Added

- 8. To select screens based on their primary object, click the gray arrow in the **View** with **Primary BO** column.
- 9. In the **Find: BODef** screen, enter all or part of the **Namespace** and/or **Name** of the business object, and click the **Find** button.

Find Close Select Clear Selection			
Find: BODef			
Find Criteria			0
Namespace	_		
Name			
Search Results			
Find Result		G	>
Line Namespace		Name	

Find BODef Screen

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



Selecting the Business Object

11. To select a specific screen to apply the event, click the gray arrow in the **Specific View** column. If you select no specific screen, the change applies to all screens.

System Configuration						
System Configuration						
Security Options Advanced						
Global Events Add 🔾						
\sim	X Line Event 🖨			Name	Views	s to Monitor
\uparrow	Line			Maine	Views with Primary BO	Specific View (blank = all views)
	1	AfterRead	*	K12.Setup.StudentNotification (K12.Student 🖨	4
	2	AfterUpdate	~	Revelation.ButtonConfirmation +	K12.AddressInfo.Street 🖨 🤇	•
Primary Business Object Selected						

12. In the **Find: ViewDef** screen, enter all or part of the **Namespace** and/or **Name** of the screen, and click the **Find** button.

Find Close Select Clear Selection				
Find: ViewDef				
Find Criteria				
Namespace	Name			
Search Results				
Find Result			۵	
Line Namespace		Name		

Find ViewDef Screen

13. In the **Find Result** grid, click the screen, and then click the **Select** button.

Find Close Select Clear Selection					
Find: ViewDef					
Find Criteria					
Namespace	Name				
Search Results					
Find Result		۵			
		Name			
		Debug Title Text			
2 K12		Staff			
J N12		atan Bauge Abbigh			
4 K12		Staff SchoolsDetail			
5 K12		StaffAdditionalJobClassesDetail			
6 K12		StaffFind			
7 K12		Student			
8 K12		Student Add			
9 K12		Student Find			
		Student Phone Numbers			

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

CREATING CUSTOM RULES

Creating custom rules allows additional validation for information entered into Synergy SIS. Custom rules can check to see how long a student has been participating in ELL, or send a list of all enrolled students whose home language is not English. To set up a rule:

1. Go to Synergy SIS > System > Setup > Rules Setup.

∀Rules Setu	p	«
Rule Name: Category:	Enable Rule:	
Rules Setup		
Rule Name	Category Enable Rule	
Rule Definition		0
Run Type	Error or Notification Caused When Email Template +	
Year Start Year End	Year Extensions	
Batch Validation Opt	ons	0
Processing Group	Include Validation Errors in Report Create Person Notification	n
Message Definition		<u></u>
Message Number +		
	•	
Help Message 🕎 📀		
	* •	
Help Link		
Rule Details		0
Rules	Add Show Det	
X Line	Order 😓 Description Type	¢

Rules Setup Screen

2. Click the Add button at the top of the screen. A new Rules Setup screen opens.

Save Close	
Rules Setup	(
Rules Setup	
Rule Name Category Enable Rule	
Rule Definition	۵
Run Type Error or Notification Caused When Email Template (Year Start Year End Year Extensions Image: Start Year Index Image: Summer	
Message Definition	(
Message Number +	
Error Message 🕎 🛇 Help Message 🕎 🛇	
	*
Help Link	

Adding a Rule

- 3. Enter a name for the rule in the **Rule Name** box.
- 4. Select a Category for the rule.
- 5. Check the **Enable Rule** box to turn the rule on.
- 6. Select the **Run Type**. **Batch** rules run once a day, **Real Time** rules run at the time the data is entered, and **Real Time and Batch** rules run for both.
- 7. In the **Error or Notification Caused When** list, select when a message regarding the rule is generated.
- 8. Click the gray arrow next to **Email Template** to find and select the mail template to be used for the message.For information about mail templates, see Chapter Eight.
- 9. Enter the school to start processing the rule in the **Year Start** box, and, if applicable, the year to stop running the rule in the **Year End** box.
- 10. Check the boxes for the **Year Extensions** for which this rule is effective.
- 11. If **Batch** or **Real Time and Batch** was selected as the **Run Type**, select **Batch Validation Options**.

Batch Validation Options				۵
Processing Group		Include Validation Errors in Report	Create Person Notification	
	~			
		Batch Validation Option	IS	

- a. Select the **Processing Group** to be used by the rule. Each processing group is assigned a run time, and a user group or individual user who receives any error notifications. Processing groups are set up using the **Rule Group** screen, as described in the next section.
- b. Check the box to Include Validation Errors in Report, if desired.
- c. Check the **Create Person Notification** box to create a notification code in the **Person Notification Codes** screen automatically, and automatically assign it to students that meet the criteria of the rule.

- 12. Click the gray arrow next to **Message Number** to select the message that is used when the rule is active. To create a custom message, see the section later in this chapter on how to customize error messages.
- 13. Click the **Save** button at the top of the screen.

Once a rule name has been created, the actual rules to validate must be added. To add the rule details:

✓Rules Setup		(
Rule Name: Total ELL Semesters Category: Student	Enable Rule: Y				
Rules Setup					
Rule Name	Category Enable Rule				
Total ELL Semesters	Student 🔽 🔽				
Rule Definition		(
Run Type Error or Notification C	aused When Email Template 🗲				
Batch 🛛 🖌 Any Rule is False	✓				
Year Start Year End Year Extensions					
🗆 Night 🗹 Regular 🗖 Summ	ner				
Batch Validation Options					
Processing Group Incl	ude Validation Errors in Report	Create Person Notification			
Demographic Validations 🔽 🔽					
Message Definition					
Rule Details					
Rules		Add Show Detail 🔕			
X Line Order ⊜ Description		Туре 🔤			
1 1 Verify that students have n	o more then 4 ELL Semesters	Total ELL Semesters Rule			
	Completed Rule				

- 1. Click the **Add** button in the **Rules** section.
- 2. A new line is added to the section. Enter a number to indicate the **Order** in which the rule should be processed.

Rule Details					
Rules Add Show Detail 🐼					
X Line Order	Туре \ominus				
	✓				

- 3. Skip Description, which will be added automatically once the rule is defined, and select the Type of rule to create. The ELL Program Rule checks the Student Home Language against the ELL Program in which the student is participating, and gives an error if they don't match. The Student Property Rule allows a rule to be created based on the values in over 10 student-related tables. The Student Related Property Rule sets up an if-then rule based on student-related tables. If the value in the first table matches the rule, it looks at a second value in a different table. The Total ELL Semesters Rule verifies that students have not been participating in an ELL program for more than X semesters.
- 4. Click the **Save** button at the top of the screen. The **Description** of the new rule indicates that the rule detail definition is invalid or missing.

Rule Details			٥
Rules	Add	Show Detail	
X Line Order ⇔Description		Туре	\Rightarrow
Rule detail definition is invalid or has not been set up. Please click 'Show Detail' to set up the ru detail	le Stud Rule	lent Property	
Bula Added to Bula Dataila			

Rule Added to Rule Details

- 5. Click the **Show Detail** button to define the newly created rule.
- 6. For the **ELL Program Rule**, choose whether to select individual languages to compare by selecting **Ad-Hoc Selection** from the **Type of Home Language Code** list or select **All Languages**. If **Ad-Hoc Selection** is chosen, check the boxes for the languages to be compared.

Rule Details			(
Rules			Add Hide Detail 🔇
Line Description	This rule verifies that for any given hor	ne language an appropriate EL	L record is created.
Validate home language of paired with ELL program	Rule		()
with EEE program	Description 🕎 🥥	Туре	
	Validate home language of paired with El	LL program 📃 ELL Pro	ogram Rule 🔽
		-	
	1		
	Rule Detail		
	Select Home Languages to be Validat	ted	
	Type of Home Language Code		
	Ad-Hoc Selection	~	
	Home Languages Help		0
	Home Language Codes		
	Language Code Di⇔ 2		
	Apache (San Carlos)	🗖 Apache (Whiteriver) 🗖 A	Arabic
	Cambodian		Chemehuevi
	Cocopah	Czechoslovakian 🗖 🛙	Dutch
	English	🗖 Filipino 🗖 F	Finnish
	French	German 🗖 0	Greek
	🗖 Haulapai	🗖 Hebrew 🗖 H	lopi
	- Hungarian	🗖 Italian 🗖 J	lapanese
	■ Kaibab-Paiute	🗖 Korean 🛛 🗖 L	aotian
	🗖 Mandarin	🗖 Maricopa 👘 🗖 N	Iohave
	🗖 Navajo	🗖 Other Indian 🛛 🗖 🛛	Other Non-Indian
	Papago	🗖 Pima 🗖 F	Polish
	Portuguese	🗖 Romanian 🛛 🗖 F	Russian
	Serbo-Croatian (formerly Yugoslav	via) 🗖 Spanish 🛛 🗖 S	Supai
	Tewa	Thai 🗖 U	Jkrainian
	☐ Vietnamese	🗖 Yaqui 👘 🦷 Y	/avapai
	🗖 Yuma		· ·
	Select Programs to be Validated		 ()
	Type of Program		
	Ad-Hoc Selection	~	
	Programs Help		٢
	Program Codes		Q
	Program Code □↔ 🕑		
			stream (Students Meeting
	Immersion Study		
	Mainstream (Parental Ot Request)	ther Instructional 🛛 🗖 Two V	Vay Immersion
	Exit Program	9	
	L		

Rule Detail, ELL Program Rule

7. For the **Type of Program**, choose **Ad-Hoc Selection** to specify which programs are valid for the languages selected above, or select **All Programs**. The rule will send an error message if a student with one of the selected languages is not participating in one of the selected programs. 8. For the **Student Property Rule**, select the **Business Object** that holds the property to be evaluated, and select the **Property Name**.

Rule Details 📀					
Rules	Add Hide Detail 🔕				
Line Description	This rule requires condition to be true for a property of Student or a one-to-one related object.				
Rule detail definition is invalid or has not been set up. Please click 'Show	Rule				
Detail' to set up the rule detail	Description 🕎 🛇 Type				
	Rule detail definition is invalid or has not been set up. Please 🗾 Student Property Rule 🕑				
	click 'Show Detail' to set up the rule detail				
	Rule Detail				
	Student Property Rule 📀				
	Business Object Property Name Condition				
	· · · ·				
	Value				

Rule Detail, Student Property Rule

- 9. Select a **Condition** from the list to compare against the data entered in the selected property. Conditions can be:
 - a. **Must Have A Value/Does Not Have A Value** the property selected must have/must not have any value. For this condition, leave the Value blank.
 - b. **Contains/Does Not Contain** the property selected must contain/must not contain the value entered.
 - c. Equal To/Is Not Equal To the property selected must be/must not be exactly the same as the value entered.
 - d. Ends With/Does Not End With the property selected must end/must not end with the value entered.
 - e. **Greater or Equal/Is Not Greater Than or Equal** the property selected must be/must not be greater than or equal to the value entered.
 - f. **Greater Than/Is Not Greater Than** the property selected must be/must not be greater than the value entered.
 - g. In List/Is Not In List the property selected must include/must not include one of the values entered in the Value field. List values are entered in the Value box separated by a comma.
 - h. Less Than or Equal/Is Not Less Than or Equal the property selected must be/must not be less than or equal to the value entered.
 - i. Less Than/Is Not Less Than the property selected must be/must not be less than the value entered.
 - j. **Starts With/Does Not Start With** the property selected must start/must not start with the value entered.
- 10. Enter the Value to be compared against the date entered in the selected property.

11. For the **Student Related Property Rule**, select the first business object that holds the property to be evaluated in **If Business Object**, and select the property name in **If Property Name**.

Rule	Rule Details 🗘						
Rule	s				Add	Hide Detail 🔕	
Line 1	Description Rule detail definition is invalid or has not been set up. Please click 'Show	This rule requires a "then" object whenever the "if" co object.					
	Detail' to set up the rule detail	Rule				٨	
		Description 野 📀		Туре			
		Rule detail definition is invali click 'Show Detail' to set up		ease 🔺 Student Re	lated Proper	ty R 💌	
				T			
		Rule Detail					
		Student Related Property Rule					
			If Property Name	If Condition			
		~	~		~		
		lf Value					
		Then Business Object	Then Property Name	Then Condition			
		~	~		~		
		Then Value					

Rule Detail, Student Related Property Rule

- 12. Select an **If Condition** to compare against the data entered in the selected property, and enter the **If Value**.
- 13. When the data in **If Property Name** meets the condition and value, the rule looks at **Then Property Name**. Select the second business object that holds the property to be evaluated in **Then Business Object**, and select the property name from **Then Property Name**.
- 14. Select a **Then Condition** from the list to compare against the data entered in the selected property, and enter the **Then Value**.
- 15. For the **Total ELL Semesters Rule**, enter the total number of semesters that students should not exceed in the ELL program in the **Total Semesters** box.

Rule Details							
Rules	Rules Add Hide Deta						
Line Description	Line Description This rule determines the total number of ELL semesters that a student is						
Verify that students have no more then 0 ELL Semesters	Rule		٥				
ther o ELL semesters	Description 🐺 📀 Type						
	Verify that students have no more then 0 ELL Semesters 🛛 🔼 Total ELL	Semesters Rul	e 🌱				
	_						
	Rule Detail						
	Total Semesters						
	0						

Rule Detail, Total ELL Semesters Rule

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

CREATING RULE PROCESSING GROUPS

Rule groups are used by custom rules that are set up for batch processing. Each group can be set up to run at a specific time of day, and notifications about any errors in processing can be sent to specific users or a user group. Groups can be set up based on processing time or type of rule processed. To create a new rule group:

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

VRule Group	(«							
Group Setup								
Default Execution Time Default Admin Users List	Execute Now							
Groups Add 🛇								
🗙 Line Group Name \ominus User Group Name 👌 Admin Users List 🔤	Execute Time 😝 Execute Now							
Rule Group Screen								

- 2. Enter the default time to run any of the groups in the **Default Execution Time** box.
- 3. Enter the email addresses of the users who will receive any error messages when groups are processed in the **Default Admin Users List**.
- 4. Click the **Add** button in the **Groups** section to create a new processing group.

Menu 🕶 😽 🛛 Save	Undo				Status: Re	ady 😥 🖓 🤣 🛛
VRule Group						(«
Group Setup						
Default Execution Time	Default Admin Users List		Execute No	WA		\frown
Groups						Add
× Line	Group Name	⇔ User Group ≑ Name	Admin Users List		Execute Time	😂 Execute Now
		\bigcirc				Execute Now

Adding a New Group

5. Enter a name for the group in the Group Name column.

VRule Group						
Group Setup						
Default Execution Time				Execute Now		
2:00 AM Groups	Role - Admin					Add 🔇
× Line	Group Name	⇔ User Group ⇔ Name	Admin Users List	Ş	Execute Time	
🗖 1 Missing Info Me	ssages	Bole	n User		2:00 PM	Execute Now
			anima Charles Addad			

New Processing Group Added

- 6. Click the gray arrow in the **User Group Name** column to select a user group. The users in this group will receive all messages from the group.
- 7. Enter the email addresses of the users who will receive any error messages when this group is processed in the **Admin Users List**.
- 8. Click the **Save** button at the top of the screen.
- 9. Enter the time the group will be processed every day in the **Execute Time** column.

Executing Rule Groups

- To run a group manually, click the Execute Now button in the group line.
- To run all groups, click the Execute Now button at the top of the screen.

CUSTOMIZING MESSAGES

Synergy SIS has pre-programmed messages that provide warnings when data is not entered correctly, give information about an error, or simply provide more information.

To override the text of an existing message:

1. Go to Synergy SIS > System > Setup > Revelation Message.

	(*
Message Number:	
Message	
Message Number Product Owned Msg Type	
Base Message	G
Msg Group 🛛 Message 🕎 📀	Help Message 🕎 🛇
	A
Help Link	
Message Override	6
Message Override 🕎 🥥 🛛 Help Message I	Override 🕎 🔇
	<u>A</u>

Revelation Message Screen

2. Find the message using the Scroll buttons or Find mode.

VRevelation Message
Message Number: 1025
Message Mumber Product Owned Msg Type
Base Message
Msg Group Message 🕎 🔾 Help Message 🕎 🛇
Attendance V Date Range must be inside District Calendar ((0))
Help Link
Message Override
Message Override 🕎 🔿 Help Message Override 🕎 📀

Modifying an Existing Message

- 3. To provide a link to web page with additional information about the message, enter the HTML path in the **Help Link** box.
- 4. Enter the new message text in the Message Override box.
- 5. Enter the new help message text in the Help Message Override box.

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

To add a new message for use in a rule:

1. Click the **Add** button at the top of the screen.

Save Close						
Revelation Message						
Message						
Message Number Product Owned Msg Type						
	×					
Base Message		(
Msg Group 🛛 Message 🕎 🥥	Help Message 🕎 📀					
×		<u> </u>				
Help Link						
Message Override		(
Message Override 🕎 🥥	Help Message Override 🕎 🥥					
	A	×				
	_	X				
1						
Adding a Revelation Message						

- 2. Assign a number to the message in the **Message Number** box. This number must be unique.
- 3. Select the type of message from the Msg Type list.
- 4. Assign a group to the message from the **Msg Group** list.
- 5. Enter the message text in the **Message** box.
- 6. Enter the help message text in the Help Message box.
- 7. To provide a link to web page with additional information about the message, enter the HTML path in the **Help Link** box.
- 8. Click the **Save** button at the top of the screen.

AUTO POPULATE

The Auto Populate screen is used to specify various options for Synergy SE special education software. For information about working with this screen, see the *Synergy SE – System Administrator Guide*.

Auto Populate			Action	
AZ ParentNotification Step0101 Question1	Name Question1 Question The purpose of this	View Order		
Question2 Question3 Step0102 StudenttEP	Name and Response			Add
		r ⊖ Name Decide to evaluate		has decided to conduct a aluation of your child.
	2	Referral for evaluation		has received a referral for a ensive evaluation of your

Chapter Eight: EMAIL CONFIGURATION

This chapter covers:

- General Email Configuration
- Customizing Email Notifications
- ► Sample Email Content
- Email Variables

Several areas within Synergy SIS can be configured to send email automatically when certain events occur. For example, parents can receive automatic notices when their children are absent or are part of a disciplinary incident. Staff can also send email manually to parents and students. To send these emails, Synergy SIS needs access to an SMTP email server. This can be an Exchange server or the Default SMTP Virtual Server included with Windows Server software.

GENERAL EMAIL CONFIGURATION

To connect the Synergy SIS email system to an email server:

- 1. Go to Synergy SIS > System > Setup > System Configuration.
- 2. In the Email Options section, check the Email Enabled box.

Email Options	۵
Email Enabled Te	st Email
SMTP Email Server	Default Email From Address SMTP Port Override - default is 25
smtp.edupoint.com	rwilson@edupoint.com
Enable SMTP Autho	entication
SMTP Username	SMTP Password

Email Options

- 3. In the **SMTP Email Server** box, enter the server name or IP address of the server running SMTP.
- 4. Enter the email address to be used as the "From:" address in the email messages sent from Synergy SIS in the **Default Email From Address** box.
- 5. If the SMTP server uses a port other than 25 to send email, enter the port number in the **SMTP Port Override** box.
- If your SMTP server requires authentication, check the Enable SMTP Authentication box, and in the SMTP Username and SMTP Password boxes, enter credentials for the SMTP server.
- 7. To test the connection to the SMTP server, click the **Test Email** button. If there is a problem with the connection to the email server, a message explains the problem. If it is successful, a message states that the send request was successful.





Caution: Be sure the anti-virus software installed on the Synergy SIS web server is not blocking port 25, as this will prevent email communications. If needed, override the SMTP port as described above.

Synergy SIS offers many ways to communicate via email.:

- Teachers can send email messages to the students and/or the parents of the students in their classes from the TeacherVUE software. These messages can be sent to all students in a class or to an individual student.
- Staff can send email messages to all of the students and/or parents of the students in the current organization in focus. These messages can also be grade-specific. For example, a message could be sent to all students in grade 9 at a school, or a message could be sent to all parents within the district.
- Parents can be sent automated messages about a student's absence, involvement in a disciplinary incident, or when a student's grades are posted. The parents can specify which of these messages they would like to receive from within the ParentVUE software, and Synergy SIS administrators can customize these messages.
- Reports can be sent via email via a scheduled report or immediately when a report is generated.
- Logs of completed process such as the Grade Book Sync, the SIF extract, or the Rules process can be sent to system administrators for monitoring.

For instructions on how email messages are generated from within the TeacherVUE software, refer to the *Synergy SIS – TeacherVUE User Guide*. For instructions on staff can send messages from within Synergy SIS, see the *Synergy SIS – Student Information User Guide*. To see how parents can customize which messages are sent to them, refer to the *Synergy SIS – ParentVUE & StudentVUE Parent & Student Guide*. To send reports via email, see the *Synergy SIS – Query & Reporting Guide*.

When email messages are generated, they are placed in a queue that is processed at specific intervals. This email queue can be set to process all messages once a day, referred to as **Bulk Mail**, or periodically throughout the day, referred to as **Immediate Email**. Only one type of queue should be used. The automated notices sent to parents can be set up with a different type of queue than the main queue setup in the **System Configuration** screen. For information about customizing the email queue for the automated parent notices, see the *Synergy SIS – ParentVUE & StudentVUE Administrator Guide*.

To set up the overall email queue processing times:

- 1. Go to Synergy SIS > System > Setup > System Configuration.
- 2. In the **Messaging** section, check either the **Bulk Mail Enable** or **Immediate Email Enable** box.

Messaging			0
Bulk Mail Enable	📃 Immediate Email Ena	ble	
Time to begin bulk emailing	Immediate Start Time	Interval in hours (1 to 24) to check for emails to send	
✓ Keep History of Bulk Emails to Each Person	Keep History of Imme	diate Emails to Each Person	
Contact Type for Email History	Blind Copy Sender o	n Immediate Emails	
Letter 💌			

Messaging

- 3. For Bulk Mail:
 - a. Enter the Time to begin bulk emailing in HH:MM AM/PM format.
 - b. To keep a record of each email sent to the parents and students, check the **Keep History of Bulk Emails to Each Person** box. The emails are recorded on the **Student Contact Log** tab of the **Student** screen.
 - c. If keeping a history of the emails sent to each person, select the type of contact that will be used when the email is entered into the contact log from the **Contact Type for Email History** list.
- 4. For Immediate Mail:
 - a. In the **Immediate Start Time** box, enter the time that email should begin processing in HH:MM AM/PM format.
 - b. Enter the number of hours between processing times in the **Interval in hours** box. For example, if the processing starts at 6:00 AM and is set to 1 hour intervals, email will be sent every hour on the hour starting at 6 am and ending at midnight.
 - c. Check the **Keep History of Immediate Emails to Each Person** box to keep a record of all emails sent. This information is stored in the database but not accessible through Synergy SIS.
 - d. To send a blind copy of each email to the sender, check the **Blind Copy Sender on Immediate Emails** box.

CUSTOMIZING EMAIL NOTIFICATIONS

Several types of email notifications can be sent out daily from Synergy SIS to parents and students. Most of these notifications are sent from the ParentVUE and StudentVUE system. Each of these notifications can be customized at the district level. The district can control the subject and the message body. To create the district email notifications:

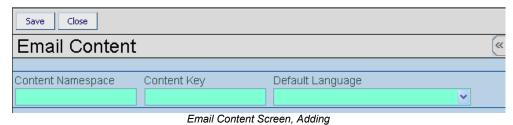
1. Go to Synergy SIS > System > Setup > Email Content.

VEmail Content								
Content								
Content Namespace	Content Key	Default Language						
			*					
Content Sections				Add	Show Detail 🔇			
X Line		Language			\Leftrightarrow			
		F " A ((A						

Email Content Screen

2. To add a new email message, click the **Add** button at the top of the screen. A new **Email Content** screen opens.

3. Enter the **Content Namespace** and **Content Key**, and select the **Default Language** to be used.



- 4. Click the **Save** button at the top of the screen.
- 5. To add the email messages, click the **Add** button in the **Content Sections** grid. For each type of email message, multiple languages can be configued. The student's home language will then determine the language used for the email that is sent.

PXP MainBulk English	VEmail Conte	ent			(«
Content Namespace Content Key Default Language PXP MainBulk English Image (Content Namespace)	Content				
		Content Key	Default Language		
	PXP	MainBulk	English	*	\frown
Content Sections	Content Sections				Add Bhow Detail 📀
X Line Language	X Line			Language	¢

Email Content Screen, Adding a Message

6. In the **Email Content Detail** screen, select the **Language** to be used in the email message.

Save Close		
Email Content	Detail	
Language	Email Subject	

Email Content Detail Screen

- 7. Enter the subject of the email in the **Email Subject** box. Variables such as the student name or district name can also be used in the subject. A list of possible variables is shown at the end of this section of the guide.
- 8. Click the **Save** button at the top of the screen.
- 9. To add the message body, click the **Show Detail** button.

10. Message can be entered either by uploading an existing HTML document, or uploading an existing Text document. Once an HTML document has been uploaded, it can be edited directly in Synergy SIS using the built-in HTML editor.

YE	Email Contei	nt		~
Con	tent			
Conte	ent Namespace	Content Key	Default Language	
PXP		MainBulk	English 🛛	
Cont	ent Sections		Add	Hide Detail 🔇
Line	Langu	age 🔶	Language: English	
1	English	~	HTML Text	
			Language Email Subject	
			English 🛛 🔽 Daily Communication from @SCHOOLDISTRICT	0
			When defining the part of the document being uploaded to include in an emailing, mai surround the section to use with: IIBEGINIIIIENDI For repeated sections use:	ke sure to
			IIREPEAT BEGINIL IIREPEAT_ENDII	
			Attach HTML Document Edit HTML Content	
			Email Content Screen, Detail View	

- 11. To upload an existing HTML document and send the message in HTML format, click the **Attach HTML Document** button. The document must be in an email message HTML format instead of a web page format, and to indicate the beginning and ending of the message the tags !!BEGIN!! and !!END!! must be added. To add a section that repeats such as a table of attendance information, mark the beginning and ending of that section with !!REPEAT_BEGIN!! And !!REPEAT_END!!
- 12. The HTML Document box opens. Click the **Browse...**button to locate the document, and then select the document.

HTML Document
Steps To Upload Image:
1) Click Browse and select the file you wish to upload
2) Click Upload
Browse
Upload
HTML Document Screen

- 13. Once the document is listed in the Browse box, click the Upload button.
- 14. When the document has been successfully uploaded, a message box opens stating that the upload was successful. Click the **OK** button.



15. To upload an existing text document and send the message in text format, click the **Text** tab.

	nt				(«
Content					
Content Namespace	Content Key	Default Language			
PXP	MainBulk	English	~		
Content Sections				Add	Hide Detail 🔕
Line Langu	lage 🔶	Language: English			
1 English	~	HTML Text			
		Language	Email Subject		
		English	🔽 Daily Communicatio	n from @SCHOOLDISTRI	CT@
	¢	Attach Text Document			
		When defining the part of the surround the section to use + IIBEGINIIIENDII For repeated sections use: IIREPEAT_BEGINII IIREF		include in an emailing, r	nake sure to

Email Content Screen, Detail View, Text Tab

- 16. Click the **Attach Text Document** button. The document must be in text format, and to indicate the beginning and ending of the message the tags !!BEGIN!! and !!END!! must be added. To add a section that repeats such as a table of attendance information, mark the beginning and ending of that section with !!REPEAT_BEGIN!! And !!REPEAT_END!!
- 17. In the **Text Document** window, click the **Browse...** button to locate the document, and then select the document.

Text Document	
Steps To Upload Image: 1) Click Browse and select the file you wish to uploa 2) Click Upload	d
Browse	
Upload	
Text Document Upload	

- 18. Click the Upload button.
- 19. When the document has been successfully uploaded, a message box opens stating that the upload was successful. Click the **OK** button.



To edit the message directly in the built-in HTML Editor:

1. Click the **HTML** tab.

	nt		(«	
Content				
Content Namespace	Content Key	Default Language		
PXP	MainBulk	English		
Content Sections			Add 🛛 Hide Detail 📀	
Line Langu	lage 🔶 Lar	iguage: English		
1 English		Text		
		guage Email Subject		
	Eng	jlish 🔽 🔽 🔽 JDaily Communication f	from @SCHOOLDISTRICT@	
	sur !IB For	en defining the part of the document being uploaded to inc round the section to use with: EGNI!IENDI! repeated sections use: EPEAT_BEGIN!! IIREPEAT_END!!	clude in an emailing, make sure to	
		Attach HTML Document Edit HTML Content		
Email Content, Editing				

- 2. Click the Edit HTML Content button.
- 3. Edit the message. The !!BEGIN!!...!!END!! tags are not shown in this mode.

Edit HTML content for PXP.MainBulk
Save Cancel
🖻 Source 🔲 🚱 🖋 🛍 😭 🖗 🖘 🏕 🌺 🧱 🖉 🥥 📰 🗏 Ω
B I U ↔ X ₂ X ² 등 등 ⊈ ≇ ♥ 10 10 10 10 10 10 10 10 10 10 10 10 10
Styles 🔽 Format 🔽 Font 🔽 Size 🔽 🗛 🖌 🏟 🖏
Thank you for participating in the success of your student(s)!
Editing HTML Content

- To edit the message in HTML code, click the Source button. When editing in HTML, the !!BEGIN!!...!!END!! tags are shown. To return to a "WYSIWYG" (What You See Is What You Get) style of editing, click the Source button again.
 - 5. Editing tools are:
 - **New Page** deletes the existing message
 - Preview opens the message in a new window
 - 💰 🛅 🛍 Cut, Copy & Paste cuts, copies, or pastes the selected text

- Paste as Plain Text this pastes the text as plain text with no formatting. This is helpful when copying from other programs which may have hidden HTML formatting, such as other web pages or Microsoft Outlook.
- Paste From Word this cleans up text that has been copied from a Microsoft Word document before pasting it into the message. Word in particular adds a lot of hidden HTML formatting to its text.
- Indo and Redo undo the last action, or redo the last action
- Here Find and Replace find and/or replace the specified text in the message
- Elect All select the entire message
- **Clear Format** clear all formatting for the selected text
- **Table** insert a table
- E Horizonal Line insert a horizontal line
- Insert Special Character insert a special character such as a copyright mark or currency symbol
- **B** *I* **U *** Bold, Italic, Underline, or Strikethrough** format the selected text as bold, italic, underline, or strikethrough
- X₂ X² Subscript or Superscript format selected text as subscript or superscript
- **I I Numbering or Bulleting** format the selected paragraphs as numbers or bullets
- Indent, Outdent or Blockquote indent or outdent the selected paragraph. Blockquote indents the paragraph on both sides.
- **Left, Center, Right, or Justify** format the selected paragraphs as left, center, right or justified text.
- Ba San Insert or Remove Hyperlink insert or remove a website link
- P Anchor insert a link to a place inside the message
- Styles Text Style select a built-in format for the selected text
- Normal (... Paragraph Style select a built-in format for the selected paragraph
- Font **Font** select a font for the selected text
 - Size Size select the size for the selected text

- At Text Color select a color for the selected text
- A Background Color select a background color for the selected text, similar to highlighting
- Description of the editing window Description of the editing w
- Show Blocks show the formatting divisions withint the message
- 6. Click the **Save** button at the top of the screen.

To add messages in additional languages:

1. Click the Add button in the Content Sections grid.

♥Email C	VEmail Content				
Content					
Content Namesp	ace Content Key	Default Language			
PXP MainBulk English 🗸					
Content Sections Add Show Detail					
X Line		Lai	nguage		¢
🔲 1 Englis	h	~			
🔲 2 Spanis	sh	~			
D 2 Spanis	sh	*	· · ·		

Adding Additional Languages

2. Select a different language, and follow the steps to create a custom message in the new language.

SAMPLE EMAIL CONTENT

Below is a table listing sample messages. You can use them by saving them to a text file and uploading them as HTML.

Content Key	Subject	Message
MainBulk	Daily Communication from @SCHOOLDISTRICT@	<style type="text/css">.{font-family: arial}</style> <div></div> <div style="background-color: #add8e6"></div> Daily email from @SCHOOLDISTRICT@ PXP about your student(s): !!REPEAT_BEGIN!! !!REPEAT_END!! Thank you for participating in the success of your student(s)!
MainImmediate	Notification	<style type="text/css">.{font-family: arial}</style> <div></div> <div style="background-color: #add8e6"></div> Notification from @SCHOOLDISTRICT@ about your student(s): !!REPEAT_BEGIN!! !!REPEAT_END!! Thank you for participating in the success of your student(s).

EMAIL VARIABLES

Variables that can be used within email subjects or message bodies to be filled in with data from Synergy SIS are:

Variable	Description	
@SCHOOLDISTRICT@	The name of the district	
@STUDENTNAME@	The student's first and last name	
@SCHOOL@	The name of the school where the student attends	
@ABS@	The absence reason for either daily or period attendance absences	
@PERIOD@	The period number	
@ABS1@, @ABS2@	The absence reasons for AM and PM attendance	
@ADDDROP@	Either Add or Drop for the section	
@COURSEIDANDTITLE@	The course ID and course title	
@TEACHER@	The teacher's name of the section	
@ROOM@	The room name of the section	
@TERM@	The term name in which the section is taught	
@TIMEOFEVENT@	The time of a discipline incident	
@REFERREDBY@	The staff who referred the student, either for a discipline incident or a nurse's visit	
@DESCRIPTION@	A description of either a discipline incident or a nurse's visit	
@REPORTPERIOD@	The grading period	
@TIMEIN@, @TIMEOUT@	The time in and time out for a nurse's visit	

Chapter Nine: OTHER SETUP

This chapter covers:

- ► How to define frequency units, labels, and page sizes
- ► How to modify lookup tables
- ► How to set up a mail merge
- ► How to set up SIF
- ► How to define tasks
- ► How to configure automatic translations
- ► How to view your software updates

System-wide options, not specific to any organization, are:

- **Frequency Unit** units of time used in various screens. For example, the definition of a quarter needs to be defined.
- Label Detail labels that can be printed from Synergy SIS. Instead of each user tweaking the setup to print labels correctly, the labels can be set up for use across the system.
- Lookup Table Definition defines the values used in the lists available throughout Synergy SIS.
- Mail Merge Definition and Mail Merge District Definition letters that can be merged with the data in Synergy SIS to produce custom letters for each student or parent.
- Page Size Detail paper sizes that can be printed from Synergy SIS.
- **SIF** (Schools Interoperability Framework) data that can be extracted and exchanged with other software systems.
- Task Definition processes that can be scheduled to run daily to produce a list of tasks for each user on the Synergy SIS home page.

FREQUENCY UNIT

The Frequency Unit definitions are time definitions that can be used for calculations in various screens such as the **Immunization Definition** screen. They specify what a particular description of a period of time actually means. For example, it can define quarterly as a 3-month period. To create a frequency unit:

1. Go to Synergy SIS > System > Setup > Frequency Unit.

Menu V (C) (N) (N) (N) (N) (N) (N) (N) (N) (N) (N
✓Frequency Unit
Frequency Unit
Basic Time Unit Multiply Factor Description

Frequency Unit Screen

Click the Add button at the top of the screen. The new Frequency Unit screen opens.

Save Close
Frequency Unit
Frequency Unit
Basic Time Unit Multiply Factor Description

Adding a New Frequency Unit

3. Select the time unit to be used in the calculation from the Basic Time Unit list.

- 4. In the **Multiply Factor** box, enter a number to indicate how many of the basic time units define the new unit. For example, a **Basic Time Unit** of **Week** and a **Multiply Factor** of **2** define a two-week period.
- 5. Enter a description of the frequency unit to be used in the other screens in the **Description** box.
- 6. Click the **Save** button at the top of the screen.

	nit
Frequency Unit	
Basic Time Unit Multiply F	actor Description
Day 🔽 🛛	per day
	Completed Frequency Unit

To delete a frequency unit:

1. Find the frequency unit using either the **Scroll** buttons or **Find** mode.

Menu 🔍 🛞 🛞 🖾 Find Undo Add Delete						
✓Frequency Unit						
Frequency Unit						
Basic Time Unit Multiply Factor Description						
Finding a Frequency Unit						

2. Click the **Delete** button at the top of the screen.

Menu V 🔇 🔇 😹 Save Undo Add Delete	Form Status: Ready (Update Mode) 🛛 🖓 🟹
✓Frequency Unit	×
Frequency Unit	
Basic Time Unit Multiply Factor Description	_
Week 2 every two weeks	

Deleting a Frequency Unit

LABEL DETAIL

The **Label Detail** screen defines the size of labels that can be used for printing in many screens, such as the reports or the default grading labels for the district.

∀Dist	rict Se	etup							<
District Setu	up								
Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps	
Grading	Labels								6
Default Grading Label									
Avery 516	0 Mailing L	abels 1"x2 5/8"			~				

Default Grading Label

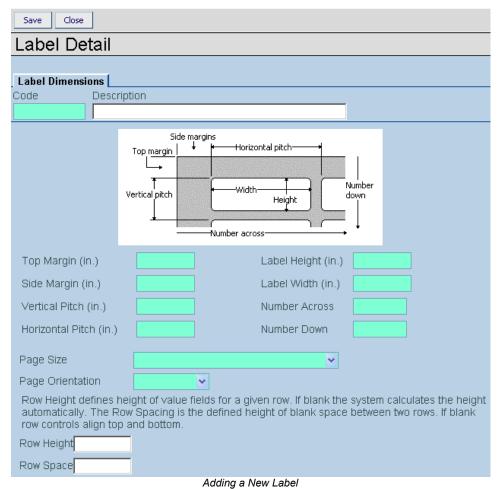
To define a new label:

1. Go to Synergy SIS > System > Setup > Label Detail.

Menu 🗸 🔇 🛞 🍏 Find Undo Add Delete	Form Status: Find 🕺 🖓 📑
√Label Detail	×
Code: Description:	
Label Dimensions Options	
Code Description	
Side margins Top <u>margin</u> Horizontal pitch Horizontal pitch	
Vertical pitch Width Height down	
Number across	
Top Margin (in.)	
Side Margin (in.)	
Vertical Pitch (in.) Number Across	
Horizontal Pitch (in.) Number Down	
Page Size	
Page Orientation	
Row Height defines height of value fields for a given row. If blank the system calculates the height automatically. The Row Spacing is the defined height of blank space between two rows. If blank row controls align top and bottom.	
Row Height	
Row Space	
Label Detail Screen	

2. Click the **Add** button at the top of the screen. The new **Label Detail** screen opens in a new window.

3. The fields highlighted in green are mandatory.

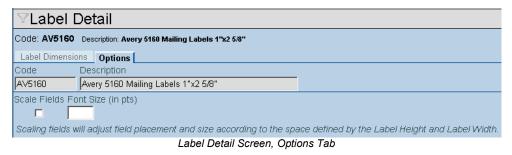


- 4. Enter a Code for the label such as AV5160, and enter a Description for the label that will be used in the lists in the other screens. A good description may include the manufacturer and product code of the label maker, along with the size of the label. For example, Avery 5160 Mailing Labels 1" x 2 5/8" would describe the Avery company's 5160 labels. It may also be helpful to include the number of labels on a page.
- 5. Enter the space between the top of the first row of labels and the top of the page in inches in the **Top Margin** box. Enter the space between the left side of the first column of labels and the left side of the page in inches in the **Side Margin** box.
- 6. Enter the size of each label from top to bottom in inches in the **Label Height** box. Enter the size of each label from side to side in inches in the **Label Width** box.
- 7. Enter the distance between the top of the first row of labels and the top of the second row of labels in inches in the **Vertical Pitch** box. Enter the distance between the left edge of the first column of labels and the left edge of the second column of labels in inches in the **Horizontal Pitch** box.
- 8. Enter the number of labels in each row in the **Number Across** box, and the number of labels in each column in the **Number Down** box.

- 9. Select the **Page Size** of each sheet of labels from the list. The available page sizes are defined in the Page Size Detail screen explained later in this chapter. Select the printed orientation of each page, either Landscape or Portrait, from the Page Orientation list.
- 10. The **Row Height** and **Row Space** are optional. The Row Height indicates how high the text is in each row of information on each label, regardless of font size. If the font is larger than the height allotted, it will be cut off. The Row Space indicates how much blank space there is between each row of text on each label. If these are left blank, the system calculates these values automatically based on the size of the label.
- 11. Click the **Save** button at the top of the screen to save the new label definition.

✓Label Detail	
Code: AV5160 Description: Avery 5160 Mailing Labels 1"x2 5/8"	
Label Dimensions Options	
Code Description	
AV5160 Avery 5160 Mailing Labels 1"x2 5/8"	
Side margins Top margin + Horizontal pitch Vertical pitch Width Height down Number 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 Portrait 💌	
Row Height defines height of value fields for a given row. If blank the system calculates the height automatically. The Row Spacing is the defined height of blank space between two rows. If blank row controls align top and bottom. Row Height Row Space	

12. Once the label has been saved, additional options may be specified by clicking on the **Options** tab.



- 13. To adjust the size of the font used for the information on the label automatically based on the label height and width, check the **Scale Fields** box.
- 14. To set the size of the information on the label to a specific size, enter the **Font Size** in points.
- 15. Click the **Save** button at the top of the screen to save the changes.

To edit an existing label definition:

1. Find the label to edit using either the Scroll buttons or Find mode.

Menu 🔻	COO Find Undo Add Delete	Form Status: Find
ƳLa	bel Detail	(«
Code:	Description:	
Label	Dimensions Options	
Code	Description	
l		

Finding a Label Definition

2. To edit the Code or the Description, click on the **Menu** button at the top of the screen and select **Edit Label Data**.



3. The fields turn white and can be edited by clicking in them.

Menu 🔻 🔍 🤇	🕄 📎 🥰 Save Undo Add Delete				
√Label Detail					
Code: AV5160 Description: Avery 5160 Mailing Labels 1"x2 5/8"					
Label Dimensi	ons Options				
Code	Description				
AV5160 Avery 5160 Mailing Labels 1"x2 5/8"					
Editing the Code and Description					

- 4. The other fields can also be edited simply by clicking in them and changing the text.
- 5. To save the changes, click the Save button at the top of the screen.

To delete a label definition:

1. Find the label to delete using either the Scroll buttons or Find mode.

Menu V () () () () () () () () () (Form Status: Find					
✓Label Detail	(«					
Cade: Description:						
Label Dimensions Options						
Code Description						

Finding a Label Definition

2. Click the **Delete** button at the top of the screen.

Menu 🔻 🛛 🔇	🕄 测 🧊 Save Undo Add Delete				
✓Label Detail					
Code: AV5160 Description: Avery 5160 Mailing Labels 1"x2 5/8"					
Label Dimensi	ions Options				
Code	Description				
AV5160	Avery 5160 Mailing Labels 1"x2 5/8"				
Deleting a Label Definition					

Deleting a Label Definition

LOOKUP TABLE DEFINITION

Most of the screens in Synergy SIS have lists where the user can select a value. The values displayed in each of these lists are stored in a lookup table. Each list has its own lookup table. Some of these lookup tables use hard-coded values that are core to the programming and cannot be changed. Other lookup tables can be edited to match the district's specifications. Lookup tables that cannot be changed are referred to as Product-Owned tables. The only information that can be added or changed to a product-owned lookup table is the value that matches the information in the lookup table in Synergy SIS to the codes used in another student information system. This allows data to be converted correctly to Synergy SIS.

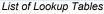
To edit or examine a lookup table:

1. Go to Synergy SIS > System > Setup > Lookup Table Definition.

Menu V 🔊 Save Undo	Form Status: Ready (Update Mode)	R.
✓Lookup Table Definition		~
Lookup Table Maintenance		۵
▶ K12		
K12.AddressInfo		
K12.AttendanceInfo		
K12.AZ.SAIS		
K12.CA		
K12.CA.CALPADS		
K12.CA.CBEDS		
K12.ConferenceInfo		
K12.CourseHistoryInfo		
K12.CourseInfo		
K12.DemographicInfo		
K12.Demographics		
K12.Discipline		

2. Find the table that needs to be changed by clicking nodes under Lookup Table Maintenance. Most of the tables used in the screens are found under the nodes that start with K12, followed by a brief description of the type of information. Information that is used in more than one screen or that is part of the setup of Synergy SIS generally are found under the Revelation nodes. Tables that are specific to one client are stored under the nodes that start with Z.

✓Lookup Table Definition	«
Lookup Table Maintenance	
▶ K12	
▼ K12.AddressInfo	
 Street Direction 	
Street Odd Even	
• Street Type	
O Unit Type	



3. To see the values in the lookup table, click the table name.

Lookup Table Maintenance											
K12	Nan	ne: S1	reet Directi	on Namespac	e: K12.Addressinfo Locked: N						
K12SpecialEd.VA.FCPS					an values reported to state win be	upped from t		oodo opd i		o to the	Etata C
K12.Accommodation		Jse C	oue as me s	tate code - a	ali values reported to state will be	useu irom i	ле юокир	code and r	nut evaluat	e to tri	state C
K12.Accommodation.Setup	Lo	okup	Values								Add
V K124ddicoolini						Other	Ctata	AH	Alt		Status
Street Direction	×		ListOrder 🔶	Code 🈂	Description 🖨	Other SIS	State Code 😂	Alt Code 3 🕀	Code 🈂	Year	Year End
Street odd Even									SIF	Start	End
 Street Type 			0	E	East						~
 Unit Type 		2	0	N	North						~
K12.AttendanceInfo			0	NE	Northeast						~
K12.AZ.SAIS											
K12.CA		4	0	NW	Northwest						~
K12.CA.CALPADS			0	S	South						~

- 4. The values in the lookup table appear in the right-side of the screen. The **Name** of the table is listed at the top, and the **Namespace** lists the business object to which the table belongs. If the table is locked for editing, it is also indicated at the top of the table in the **Locked** value.
- 5. Click the **Add** button to add a new code, or click in the box in the **X** column to delete a code. If the table is product-owned and cannot be changed, a note appears at the top of the lookup table.

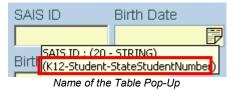
Lookup Table Maintenance		
K12 K12.SpecialEd.VA.FCPS K12.Accommodation	Name: Street Odd Even Namespace: K12.Addressinfo Product Owned	ind not
 K12.Accommodation.Setup K12.AddressInfo Street Direction 	Product Owned lookups can be viewed but not updated, except the Other SIS column. The Othe column is used for data importing. NOTE: The Other SIS column for Product Owned lookup cleared after a new installation.	
Street Odd Even Street Type Unit Type	Line ListOrder Code Code Description Code State Alt Code Alt	Code SIF
 Unit Type K12.AttendanceInfo 	0 E Even Street Numbers	
K12.AZ.SAIS	20 Odd Street Numbers	

Note – The only value that can be entered for a product-owned lookup table is the **Other SIS**. This is the code used in the previous student information system for the lookup table value. The **Other SIS** column for all product-owned lookup tables is cleared each time Synergy SIS is installed.

- 6. The order in which the values are displayed can be set by entering the order number in the **ListOrder** column. If the numbers in the **ListOrder** field are the same or are all blank, the **Code** is used to sort the list, and then the **Description**.
- 7. Enter an abbreviation for the lookup table value in the **Code** column. This value must be unique, but it is only used internally to link the tables in the database and is not displayed. It can be the same as the code used by the state but it can also be the district's own coding structure.
- 8. Enter the description of the code in the **Description** column.
- 9. The **Other SIS** column is used to import data during the conversion process from another student records system. Enter the code used in the old system in this column.
- 10. If the code chosen is different than the state code, enter the actual code used by the state in the **State Code** column.
- 11. If appropriate, a start date and end date may be entered for the code in the **Status** column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but is not available for selection for new transactions in the screen. For example, if a code is no longer valid for transactions at the state beginning FY2008, select 2008 for the end year.
- 12. The **Alt Code 3** is used to denote a code as having a special value, or used to indicate an additional code for data integration with another system.
- 13. The code used in the SIF (Schools Interoperability Framework) schema for this value should be entered in the **Alt Code SIF**.
- 14. The checkbox at the top of the table **Use Code as the State Code** is generally not used. By default, the code in the Code column is used for the state transactions, unless there is a code entered in the State Code. If a code is entered in the State Code column, that code is used.
- 15. Click the **Save** button at the top of the screen to save any changes.

This provides a general overview of the lookup tables. Instructions for the lookup tables used in each screen can be found in the guide that explains that screen.

To discover the name of any lookup table in a screen, hover the mouse over the list and a yellow box will pop-up with the name of the table.



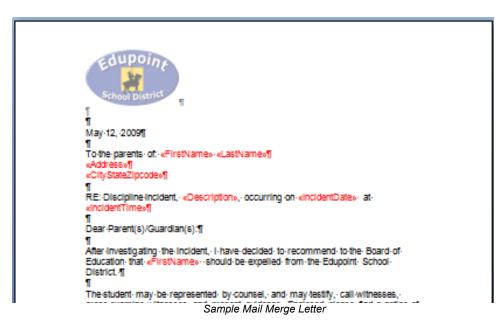
This functionality is referred to as showing the business object (field/lookup table name) on hover. This functionality needs to be enabled for each user through the **Security Settings** tab on the **User** screen. Check the box labeled **Show BO On Mouseover**. For more about editing the **User** screen, see the chapter on Staff and Users in this guide.

MAIL MERGE DEFINITION AND MAIL MERGE DISTRICT DEFINITION

Note – This section describes the original mail merge functionality in
Synergy SIS, now known as Mail Merge 1.0. Information about Mail
Merge 2.0 is in a separate guide.

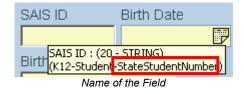
Setting up a mail merge consists of two steps. The first step is creating the letter or form in Microsoft Word, and the second step is adding the document to Synergy SIS and defining it as a mail merge document.

To create the letter or form, start a new document in any version of Microsoft Word. Write the letter, and then add the fields to be used when merging the letter with the information from the student's record. The field names need to be entered in the following format:



<<FieldName>>

Common field names to use are: FirstName, LastName, Address, and CityStateZipCode. To discover the field name for any field in a screen, pause the pointer over a field. A yellow box appears with the name of the field.



This functionality is referred to as showing the business object (field name) on hover. This functionality needs to be enabled for each user through the **Security Settings** tab on the

User screen. Check the box labeled **Show BO On Mouseover**. For more about editing the **User** screen, see the chapter on Staff and Users in this guide.

Once the letter or form has been created, it needs to be added to Synergy SIS as a mail merge document. This is done using either the Mail Merge Definition screen to define a letter for a specific school, or the Mail Merge District Definition screen to set up the letter for the entire district. Both screens work exactly the same, so the following instructions can be used with either screen. To add the document to Synergy SIS:

1. Go to Synergy SIS > System > Setup > Mail Merge Definition. Be sure the focus is set to the correct school when not setting the district definition.

Menu V 🔇 🔇 🛞 😽 Find Undo Add Delete Sta	tus: Find 😥	R. 20
✓Mail Merge Definition		~
Name: Type: Default Language:		
Documents		
Name Type Default Language Report Name Mail Merge	Version	
Mail Merge Documents		Add 🔕
Ine Language Revision Document Date Added U	ser Who Add	ed
Merge 2.0 Advanced Settings		(
Mail Merge XPath		
ļ		

Mail Merge Definition Screen

- 2. Click the **Add** button at the top of the screen. The new **Mail Merge Definition** screen opens.
- 3. In the **Name** box, enter a description of the mail merge for display in other screens.

Save Close			
Mail Merge De	finition		*
Name	Туре	Default Language Report Name 🔶	
Transcript Letter	General	English	

New Mail Merge Definition Screen

 Select the Type of mail merge from the list. The district can define the categories to be available for the Type list by modifying the lookup table Revelation.MailMerge.MergeType as outlined in the Lookup Table Definition section of this chapter.

Nar	Name: Merge Type Namespace: Revelation.MailMerge Locked: N										
🗖 Use Code as the State Code - all values reported to state will be used from the lookup code and not evaluate to the State C											
Lookup Values Add 🛇											
~						State		Alt Code			
\mathbf{x}	Line	ListOrder	Code	Description	Other SIS	Code	Alt Code 3	SIF	Year Start	Year	End
	1	0	0	General						~	*
	2	0	1	Labels						~	~

Merge Type Lookup Table

- 5. Select the **Default Language** from the list to be used when no other language is selected when printing the mail merge.
- 6. To associate the mail merge with a specific report, click the gray arrow next to **Report Name**. The **Find: ReportDef** screen appears.

	Note – Associating a mail merge document with a report allows the mail merge to print at the same time as the report so that the information in the mail merge document matches the information in the report. For example, the mail merge document could be a cover letter sent home to parents accompanied by a report card or disciplinary profile. Once the definition has been created and associated with the report, the mail merge definition can be selected on the Sort/Output tab of the Report Interface for that report. There are also special mail merges that can be created for Disciplinary Action Forms and Attendance Letters. For more information about these special mail merges, see the Synergy SIS – Discipline & Conference Administrator Guide and the Synergy SIS – Attendance Administrator Guide.
--	--

 To find a report, enter all or part of the Namespace of the report such K12.Discipline, part of the Name of the report, or part of the report Number. Once the criteria are entered, click the Find button.

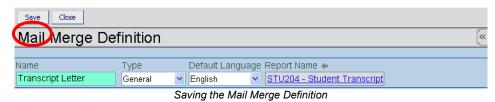
Find Close Select Clear Selection			
Find: ReportDef			
Find Criteria			<u> </u>
Namespace		Name	
K12.co			
Number			
Search Results			
Find Result			(
Line Namespace	Name		Number



8. In the **Find Result** grid, click the report, and click the **Select** button at the top of the screen.

Find: ReportDef	
ind Criteria	
lamespace	Name
K12.co	
lumber	
Search Results	
	Name Namber
Find Result	Number Conference Summary CNF601
Find Result Line Namespace	
Find Result Line Namespace 1 K12.ConferenceInfo.Reports	Conference Summary CNF601
Find Result Line Namespace K12.ConferenceInfo.Reports K12.CourseHistoryInfo.Reports	Conference Summary CNF601 Course History Labels With GPA CHS801
Find Result Line Namespace 1 K12.ConferenceInfo.Reports 2 K12.CourseHistoryInfo.Reports 3 K12.CourseHistoryInfo.Reports	Conference Summary CNF601 Course History Labels With GPA CHS801 Repeat Course CHS403
Find Result Line Namespace 1 K12. Conference info. Reports 2 K12. CourseHistoryInfo. Reports 3 K12. CourseHistoryInfo. Reports 4 K12. CourseHistoryInfo. Reports	Conference Summary CNF601 Course History Labels With GPA CHS901 RepeatCourse CHS403 Student Transcript STU204

- 9. In the Mail Merge Version list, click 1.0.
- 10. Click the **Save** button at the top of the screen.



11. To attach the mail merge Word document, click the **Add** button in the **Mail Merge Documents** section. The **Attach document** box opens.



Adding a Mail Merge Document

12. Click the Browse button to locate and select the Word document.

Attach document
Steps To Upload Image: 1) Click Browse and select the file you wish to upload
2) Click Upload
Browse
Upload
Attach Document Box

- 13. Click the **Upload** button to upload the document to Synergy SIS. A message indicates the successful upload.
- 14. Click the **OK** button.



15. In the new line in the Mail Merge Documents section, select the Language in which the document is written.

™Mail Merge [Definitio	n			(«
Name: Transcript Lette	r Type: Gener	al Default Language: Engl	ish		
Documents					
Name	Туре	Default Languag	e Report Name 🔶		
Transcript Letter	General	English 💽	STU204 - Student	Transcript	
Mail Merge Documents					Add 🔇
X Line Language	Ş	Revision	🔶 Document	Date Added	😂 User Who Added
	*		W	06/20/2011 14:31:00	User, Admin 🖨

Mail Merge Definition Screen, Adding a Document

- 16. If desired, enter a Revision number for the document.
- 17. Click the Save button at the top of the screen.

♥Mail Merge [Definition				(«	
Name: Transcript Lette	Name: Transcript Letter Type: General Default Language: English					
Documents						
Name	Туре	Default Language	Report Name 🔶			
Transcript Letter	General 🛛 👻	English 🔽	STU204 - Student	Transcript		
Mail Merge Documents					Add 🔇	
X Line Language	\Rightarrow	Revision	🔶 Document	Date Added	😝 User Who Added	
🔲 1 English	✓ 1.0		W	06/20/2011 14:31:00	User, Admin 🖨	

Mail Merge Definition Screen, Finishing the Definition

Multiple documents can be added to each definition in different languages. Only one document should be added for each language. At the time the mail merge is printed, the document in the language of the student's home language or primary language is printed. If a document is not available in the student's home language, the document for the default language is printed.

✓Mail Merge Definition									
Nam	Name: Absence Letter 1 Type: General Default Language: English								
Doc	umer	nts							
Nam	е		Туре	Default Language	Report Name 🔶				
Abse	ence L	.etter 1	General	👻 English 🛛 👻	EXT801 - Letter Ex	tract			
Mai	Mer	ge Documents						Add	
$ \mathbf{X} $	Line	Language		Revision	🔶 Document	Date Added	\Rightarrow	User Who Added	
		English	*		W	03/25/2008 08:32:00		Wilson, Rob 🗲	
	2	Spanish	*		W	03/25/2008 08:33:00		Wilson, Rob 🗲	
	3	Greek	*		W	03/25/2008 08:32:00		Wilson, Rob 🗲	
		Laotian	*		W	03/25/2008 08:32:00		Wilson, Rob 🗲	
		Mandarin	~		W	03/25/2008 08:32:00		Wilson, Rob 🗲	

Multiple Languages Available for a Mail Merge Definition

To edit a Mail Merge definition:

1. Find the definition to edit using either the Scroll buttons or Find mode.

Menu 🔻 《 (9 🛞 🖏 🔚	d Undo Add Delete	Status: Find 😥 🖓 🖓
™Mail M	erge Definitio	n	(«
Name: Type:	Default Language:		L
Documents			
Name	Туре	Default Language Report Nam	ne 🗕 Mail Merge Version
		▼	✓
		Finding a Mail Merge Definiti	on

Finding a Mail Merge Definition

2. To edit the top row of information (the Name, Type, Default Language, or Report Name), click the **Menu** button at the top of the screen and select **Edit MailMerge Data**.

Menu 🔻 🛛	$\langle \mathbb{Q} \rangle$	Save Save	Undo Add	Delete
Edit MailMer	qe Data			
View Audit D	etail For Mail N	Verge Definition		
Name: Tran	script Lette	r Type: General	Default Language: En	glish
	Menu, E	dit MailMerge L	Data Option	
VMail Merge	Definition			
Name: Absence Letter	1 Type: General D)efault Language: Englis	h	
Documents				
Name	Туре	Default Language	Report Name 🔶	Mail Merge Version
Absence Letter 1	General 💌	English 🔽	EXT801 - Letter Extract	~
	E	diting the Defin	ition	

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

To delete the entire Mail Merge Definition:

- 1. Delete all attached documents.
- 2. Click the **Delete** button at the top of the screen.

Menu 🔻 🔇 🔇 📎	Sar	ve Undo Ad	dd Delete	Status: Ready		2 R.	S 0
♥Mail Merge	Definitio	on					«
Name: Absence Lette	er 1 Type: Gen	neral Default Langua	ge: English				
	er 1 Type: Gen Type		ge: English nguage Report Name	4	Mail Merge	Version	
Documents					Mail Merge	Version ~	

Deleting the Entire Mail Merge Definition

PAGE SIZE DETAIL

When printing reports and other output, users select he size of the paper to be used, such as Letter, from a list. The page size lists throughout Synergy SIS are populated by Page Size Detail definitions. To create a new page size to be available:

1. Go to Synergy SIS > System > Setup > Page Size Detail.

Menur 🔍 🛞 💭 🔚 Ind Undo Add Delete	Form Status: Find 🔊 🖓 🕻
VPage Size Detail	(«
Page Code: Description:	
Page Dimensions	
Page Code Description	
Width (in.)	
Height (in.)	
,	

2. Click the **Add** button at the top of the screen. The new **Page Size Detail** screen opens.

Save Close
Page Size Detail
Page Dimensions
Page Code Description
Width (in.)
Height (in.)

New Page Size Detail Screen

- 3. Enter a code for the page size definition in the **Page Code** box. This code appears in many lists, so it should be a code that makes the page size easily recognizable.
- 4. Enter a longer description of the definition in the **Description** box.
- 5. Enter the **Width** and **Height** of the page in inches.
- 6. Click the **Save** button at the top of the screen to save the definition.

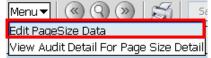
To edit an existing page size definition:

1. Find the label to edit using either the Scroll buttons or Find mode.

Menu 🔻	$\langle \langle Q \rangle \rangle$	👼 Find	Undo Ad	ld Delete		Form Status: Find	ə 🖓 [
∀Pa	ge Size E	Detail					(«
Page Co	de: Description:						
Page Di	mensions					 	
Page Co	de Descript	tion			1		
Width (in	.)						
Height (ir	1.)						

Finding a Page Size Definition

2. To edit the **Page Code** or the **Description**, click on the **Menu** button and select **Edit PageSize Data**.



Page Size Detail, Menu Options

To edit the Width and Height, Edit PageSize Data is not required.

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

To delete a page size definition:

1. Find the page size to delete using the Scroll buttons or Find mode.

Menu V 🛞 🛞 🚮 Find Undo Add Delete	Form Status: Find 🛛 🖓 🏠
♥Page Size Detail	(«
Page Code: Description:	
Page Dimensions	
Page Code Description	
Width (in.)	
Height (in.)	

Finding a Page Size Definition

2. Click the **Delete** button at the top of the screen.

Menu 🔻 🛛 🔇	🕄 🛞 🛛 🏹 🛛 Save Undo 🛛 Add 🕞 Delete
♥Page S	Size Detail
Page Code: Le	tter Description: Letter (8.5 x 11)
Page Dimensi	ons
Page Code	Description
Letter	Letter (8.5 x 11)
Width (in.)	
8.50	
Height (in.) 11.00	

Deleting a Label Definition

SIF (SCHOOLS INTEROPERABILITY FRAMEWORK)

SIF stands for Schools Interoperability Framework, which is a standard established for data exchanges between software systems for schools. Synergy SIS supports the SIF standard, and can import data in SIF format. The Synergy SIS SIF Agent must be purchased separately.

SIF transactions are scheduled through the **System Configuration** screen. To set up or adjust the SIF transactions process:

- 1. Go to Synergy SIS > System > Setup > System Configuration.
- 2. Click the **Options** tab, and scroll to the **Schools Interoperability Framework (SIF)** section.

✓System Configuration	
System Configuration	
Security Options Advanced	
Page Definitions	٢
Help System	٢
Fee System	٢
Map Options	٢
User Session State Management	٢
System Cache	٢
Pre-Installation Backup of MSSQL Server Database	٢
Capture User Performance Statistics	٢
Schools Interoperability Framework (SIF)	٢
Schedule the job queue task to process SIF transactions:	
Email the following address(es) upon failure e.g. user@server.net, user2@server2.com	
Hours to Recur Submit Job	

System Configuration Screen, Options Tab

- 3. In the box provided, enter the email addresses of staff to be notified if the SIF process has an error. Separate addresses with commas.
- 4. Enter the number of hours between SIF processes in the Hours to Recur box.
- 5. Click the **Save** button at the top of the screen.
- 6. Click the **Submit Job** button to schedule the SIF process.

The list of SIF transactions that has been processed can be seen in the **SIF Transaction History** screen. To view the previous SIF transactions:

1. Go to Synergy SIS > System > SIF > SIF Transaction History.

Menu 🕶 🔇 🎱 💓 🛛 🖼 🛛 Eind Unda	Add Delete		Form Status: Find 🛛 🖓 🖓
SIF Transaction History			(«
SIF Object: Processing Start Time: Processing Finis	sh Time:		
SIF Transactions			
SIF Object	Time Received	Processing Start Time	
Transaction Data			٥
Transaction XML 📀			
			<u> </u>
			V
Transaction Status			 ()
Processing Finish Time State			
Error Result 📀			
			<u> </u>
			T

SIF Transaction History Screen

- 2. To find a transaction, use the Scroll buttons or Find mode.
- 3. The **SIF Object** is the type of information included in the transaction, such as StudentGrade or SectionInfo. For the possible list of objects, see the official SIF website at http://www.sifinfo.org.
- 4. The time the data was received from the other software system is listed in the **Time Received** box, and the time at which Synergy SIS began processing the data is listed in the **Processing Start Time** box.
- 5. The data that was imported into Synergy SIS is shown in the SIF XML schema format in the **Transaction XML** box.
- 6. The time the SIF transactions finished processing is shown in the **Processing Finish Time** box.
- The current status of the transactions process is listed in the State list. If the job is Complete, it finished with no errors. If it shows Error, it finished with errors. The errors will be listed in the Error Result box.
- 8. If the state is **In Progress**, the job is still running. If the process shows Skipped, Not Handled, the process was either manually cancelled or some other system error caused the job not to process. **Waiting** mean the process has not started yet.

TASK DEFINITION

Tasks in Synergy SIS provide "to-do" lists on the home page. For example, a task may remind a school nurse when to administer medication to a student.

🛛 🏠 Quick La	unch	S.			Lock Sign Ou	ıt Support Help	
Good afternoon	, Admin User					«	
Show Dismissed	Messages						
Announcements							
Line Urgency Organization Name Announcement Dismiss or Reca Message							
1 🏴	Edupoint School District					Dismiss	
Tasks						 ()	
Line	Task Date/Tir	ne		Name	Description	Action	
1 11/01/2010	12	:00 AM	()	Abbott, Billy C	Health	 Image: A start of the start of	
2 05/16/2011	1:	00 PM		Abbott, Billy C	Medication		
3 05/16/2011	1:	00 PM		Abbott, Billy C	Medication		
	Good afternoon Show Dismissed Announcements Line Urgency 1 P Tasks Line 11/01/2010 2 05/16/2011	Good afternoon, Admin User Show Dismissed Messages Announcements Line Urgency Organization Name 1 PEEdupoint Name 1 Edupoint Content Tasks Line Task Date/Tin 1 11/01/2010 12 2 05/16/2011 1:0	Cood afternoon, Admin User Show Dismissed Messages Announcements Line Urgency Organization Name Announcement District D	Cood afternoon, Admin User Show Diemissed Messages Announcements Line Urgency Organization Name Announcement Because we have been experie District of "power hungy" equipment ar Tasks Line Task Date/Time 1 11/01/2010 12:00 AM 2 05/16/2011 1:00 PM	Good afternoon, Admin User Show Dismissed Messages Announcements Line Urgency Organization Name Announcement 1 Edupoint School District Because we have been experiencing power outages in of "power hungry" equipment and devices during aftern Tasks Ime 1 Task Date/Time 1 11/01/2010 1 12:00 AM 2 05/16/2011 1:00 PM Abbott, Billy C	Good afternoon, Admin User Show Dismissed Messages Announcements Line Urgency Organization Name Announcement 1 P Edupoint School Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods. Tasks Line Task Date/Time 1 11/01/2010 12:00 AM 2 05/16/2011 1:00 PM	

Tasks Displayed on the Synergy SIS Home Page

Examples of tasks that can be displayed:

- Follow-ups to student health incidents as defined by the **End Date** of the **Accident Detail** tab of the **Nurse's Log** tab on the **Health** screen
- Follow-ups to student conferences as defined by the Follow-Up Date in the Student Conference screen
- Follow-ups to student discipline incidents as defined by the Follow-Up Date in the Student Incident screen
- Medication and procedures as scheduled on the **Medications** tab of the **Health** screen
- Updates to student information submitted by parents through the ParentVUE portal to be reviewed in the **Review PVUE Updates** screen
- Updates to a student's change of address caused by changing the address of a sibling at another school.

The tasks are generated once each day by a process run through the Job Queue on the process server. The task process can also be run manually. To turn on the task process and schedule when the process runs:

Y	ask L	Definiti	on									
Task	Process											
Task	Executio	n Time										
4:00 I	PM		Run Tas	Run Task Process Immediately								
			Options									
			Generate	e Task For Entire Day								
				Task For Entire Day is select only if the user clicks Run Tas		the task list will be built for the s Immediately.	entire day. This is					
Task	Definitio	on [
Task	Definitio	n										
Line	Enabled	On Start	Email On Complete	Description		Module	Task Update Type					
	V			ESR District Registered	* *	Electronic Student Record	Manual					
	V			🕎 🎯 Dstrict Registered	*	Electronic Student Record	Automatic					
	V			🕎 🋇 Incoming Request	A T	Electronic Student Record	Automatic					
	V			ESR Student Response	*	Electronic Student Record	Automatic					
	V			🕎 🋇 Student Repsonse	*	Electronic Student Record	Automatic					
	~			🕎 🛇 Family Changes	*	Family Changes	Manual					
	I ▼											

1. Go to Synergy SIS > System > Setup > Task Definition.

- 2. In the **Task Execution Time** field, enter in HH:MM AM/PM format the time when tasks that are enabled and executed automatically should be run.
- 3. To enable a task generation process, check the box in the **Enabled** column.
- 4. To generate email when the process starts and ends, check the boxes in the **On Start** and **On Complete** columns.
- 5. In the **Description** column, enter a description to appear in the list of tasks available to the user in the **User Profile** screen, on the **POV** tab.
- 6. Click the **Save** button at the top of the screen to save the changes.
- 7. If you are running the task process manually and want to build tasks for the entire day, check the **Generate Task For Entire Day** box.
- 8. To run the tasks outside of the scheduled time, click the **Run Task Process Immediately** button.

Once tasks have been enabled, they need to be added to the users' home pages by a system administrator or the users themselves. The tasks can be turned on at the user group level or at the user level. To turn on tasks for a user group:

1. Go to Synergy SIS > System > User > User Groups, and click the POV tab.

✓User Groups	(
User Group Name: Admin Hope High	
Members Organizations Navigation Menu Options Security Settings POV	
User Group Name Name of user group in LDAP (if synching	g with LDAP)
Admin Hope High	
Task Setup	
Show Task List	
Yes 🗸	
Task Module	
Electronic Student Record	
Family Changes	
Verify Franks	
✓ Incident Discipline	
✓ Incident Referral	
PVUE Update	
Request for Assistance	
Routing - Transportation	
School Workflow	
T Student	
Student Workflow	
Teacher - Transportation	
Transport - Transportation	

User Groups Screen, POV Tab

- 2. To display the task list on the home page of all users in the group, select **Yes** in the **Show Task List** list.
- 3. Check the box for each **Task Module** to be displayed on the home page.
- 4. Click the **Save** button at the top of the screen.

To turn on tasks at the user level:

1. Go Synergy SIS > System > User > User, and click the POV tab.

VUser										(
User Name: Use	er, Admin									
Demographics	Organizations	User Groups	Navigation Men	J Secu	rity Settii	ngs	Focus	Spell	Check	POV
Last Name	First N		Middle Name	Disabled	User Ty	ре	Login	as User		
User	Admin				Staff	~				
Point of View (PO	OV) Home Page	Settings								0
Dashboard Contr	ols						A	\dd	Choo	iser 🔇
Task Setup										6
Show Task List										
Yes 💌										
Task Module										
	tudent Record									
 □ Family Chan □ Health □ Incident Disc □ Incident Refe 	iges									
Health										
Incident Disc	cipline									
PVUE Updat										
Request for										
U U	ansportation									
School Work	kflow									
Student										
Student Wor										
	ransportation									
Transport -	Transportation									

User Screen, POV Tab

- 2. To display the task list on the home page of the user, select **Yes** in the **Show Task** List list.
- 3. Check the box for each **Task Module** to be displayed on the home page.
- 4. Click the **Save** button at the top of the screen.

When tasks are displayed on the home page, they can be recorded by clicking the icon to the left of the student's name. The icon is different for each type of task.

		Quick Lau	inch	R.			Lock Sig	n Out Suppor	t Help
My Toolbar	Good	afternoon,	Admin User						«
8	S	how Dismissed N	lessages						
Student	Anno	uncements							
	Line	Urgency	Organization Name	Announcement				Dismiss o Message	r Recall
At a	1	۳	Edupoint School District	Because we have been experiencing power outages in the afternoon, please limit your use of "power hungry" equipment and devices during afternoon peak periods.					J
Grade Book Admin Login	Tasks	:							٨
	Line		Task Date/Ti	me		Name	Description	Ac	tion
N	1	11/01/2010	1	2:00 AM	•	Abbott, Billy C	Health	•	
User	2 (05/16/2011	1	00 PM		Abbott, Billy C	Medication		
USER .	3 (05/16/2011	1	00 PM	Q	Abbott, Billy C	Medication		

Synergy SIS Home Page, Task List

Clicking the icon opens the primary screen for the task. For example, clicking a Medication task opens the **Medication and Service Monitor** screen.

TRANSLATION

The **Translation** screen enables you to create machine-translated versions of documents and other elements in Synergy. These translations do not have the accuracy of those done by human translators, but you can edit them to improve their quality.

You can translate a report and various data elements that may appear in the report, such as business objects, values from lookup tables, and common data found in the master database table.

To translate a report:

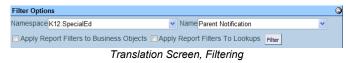
- 1. Go to Synergy SIS > System > Setup > Translation.
- 2. In the **Translation Language** list, select the desired language to translate into.

✓Translation	«
Reports Business Objects Lookup Views Master Data	
Translation Language Serbo-Croatia 💙	
Set the following dropdown and click the Create Default Translation button to create a default translation in the language you have specified. This translation is accomplished with a computerized engine and will not have the accuracy of a human translator. The translation will be applied to all tabs that have filter criteria set.	5
Translator Engine Language Create Default Translation	
Translation Conditions Summary	
Refresh Condition Status	
Filter Options	٥
Namespace 🗸 Name	
Apply Report Filters to Business Objects Apply Report Filters To Lookups	
Reports	>
Line Sub-Report Name Section Control Name Text Translation Lock Translate	
Translation Screen, Reports Tab	

3. In the **Translator Engine Language** list, select from the available languages for machine translation. It is possible that the language from step 2 is not in this list, and you must select the nearest approximation.

Reports Business Objects Lookup Views Master Data
Translation Language Serbo-Croatia 🐱
Set the following dropdown and click the Create Default Translation button to create a default translation in the language you have specified. This translation is accomplished with a computerized engine and will not have the accuracy of a human translator. The translation will be applied to all tabs that have filter criteria set.
Translator Engine Language Slovak
Translation Conditions Summary
Refresh Condition Status
Filter Options (
Namespace V Name V
Apply Report Filters to Business Objects Apply Report Filters To Lookups
Reports
Line Sub-Report Name Section Control Name Text Translation Lock Translate
Translation Screen, Reports Tab

4. In the **Filter Options** section, use the **Namespace** and **Name** lists to find the report to translate.

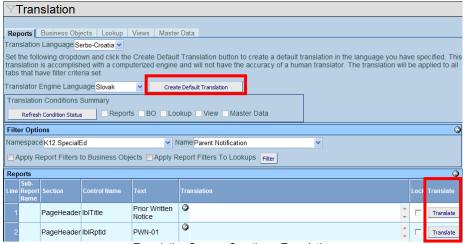


- 5. To translate business objects that can appear in the selected report, check the **Apply Report Filters to Business Objects** box.
- 6. To translate lookup table values that can appear in the selected report, check the **Apply Report Filters To Lookups** box.
- 7. Click the **Filter** button. Text items that appear in the report are added to the **Reports** grid.

∀Trar	slation									
Reports	Business Obj	ects Lookup	Views Master	r Data						
Translatio	n Language <mark>S</mark>	erbo-Croatia 💌								
translation	Set the following dropdown and click the Create Default Translation button to create a default translation in the language you have specified. This translation is accomplished with a computerized engine and will not have the accuracy of a human translator. The translation will be applied to all tabs that have filter criteria set.									
Translator	Translator Engine Language Slovak Create Default Translation									
Translatio	n Conditions	Summary								
Refre	h Condition Statu	s Report	s BO Loo	okup 🗌 View 🗌 Master Data						
Filter Opt	ons				0					
Namespa	e K12.Special	Ed	✓ N	lameParent Notification						
Apply F	Report Filters	to Business Obje	ects 🔲 Apply R	eport Filters To Lookups Filter						
Reports					۵					
Line Sub- Repor Name	t Section	Control Name		Translation	Lock Translate					
1	PageHeade	lblTitle	Prior Written Notice	Ŷ	Translate					
2	PageHeade	IbIRptid	PWN-01	• •	Translate					

Translation Screen, Filtering

8. Click the **Create Default Translation** button to translate all items, or click a **Translate** button to translate a single item.



Translation Screen, Creating a Translation

9. If the translations do not appear in the **Translation** column of the **Reports** grid, click the Refresh View icon at the top of the page.



10. Edit the translation in the Translation column if necessary.

Rep	orts						۵	
Line	Sub- Report Name		Control Name	Text	Translation	Loci	Translate	
1		PageHeader	IbITitle	Prior Written	Predchádzajúceho písomného oznámenia		Translate	
	Translation Screen, Editing a Translation							

11. Check the **Lock** box to prevent further editing, and click the **Save** button at the top of the screen.

Rep	oorts						۵
Line	Sub- Report Name	Section	Control Name		Translation	Lock	Franslate
1		PageHeader	IblTitle	Prior Written	Predchádzajúceho písomného oznámenia		Translate
				Translatio	on Screen, Locking a Translation		

The other tabs on the **Translation** screen are for translating items that might appear in reports. The process for translating those items is very similar to the process for the report text itself. (However, there is rarely a reason to translate text from Synergy screens, using the **Views** tab.)

Tip – As you translate, the boxes under **Translation Conditions Summary** on all tabs indicate your progress. These boxes are read-only. To refresh the display of these boxes, click the **Refresh Condition Status** button.

Translation Conditions Sum	nary
Refresh Condition Status	Reports BO Lookup View Master Data
	Translation Conditions Summary

Example: Business Objects

You can translate business objects associated with staff credentials. On the **Business Objects** tab, enter filters as shown here.

Translation				
Departs During Older t	Lashua Viena Master	Data		
Reports Business Objects	Lookup Views Master	Data		
Set the following dropdown	and click the Create Default		o create a default translation in the language you a human translator. The translation will be applie	
ranslator Engine Language		Default Translation		su to diritabo that have inter efferta set.
Translation Conditions Sum	mary			
Refresh Condition Status	Reports BO Loo	kup 🗌 View 🗌 Mas	ter Data	
Filter Options				O
Vamespace K12.StaffInfo	Name Sta	affCredential	Property	
Apply Report Filters to B	usiness Objects Filter			
Business Objects				(
Line Namespace Name	Property	Label Overri	de Translated Label	Lock Translate
1 K12.StaffInfo StaffCred	lential ChangelDStamp	Change ID Stamp	Anderung ID-Stempel	🗘 🗖 Translate
2 K12.StaffInfo StaffCred	lential CredentialType	Credential Type	Typ der Anmeldeinformationen	🗘 🗖 Translate
3 K12.StaffInfo StaffCree	lential DateEarned	Date Earned	Oatum erworben	🗘 🗖 Translate
4 K12.StaffInfo StaffCree	lential DocumentNumber	Document Number	Selegnummer	Translate

Business Objects Translations

Example: Lookup

You can translate the descriptions of states of repair for students' lockers. These descriptions are found on the **Lookup Table Definition** screen, in the namespace: **K12.LockerInfo**, in the lookup table **Locker Condition**.

	K12.LockerInfo
	Locker Condition
	Locker Mass Asg Options
	Locker Order
	Locker Type
	Override Combination
	Process Type
	Student Order
	Students In Locker
	Vertical Location
Lookup Ta	bles in the K12.LockerInfo Namespace

Nam	Name: Locker Condition Namespace: K12.LockerInfo Locked: N							
U	Use Code as the State Code - all values reported to state will be used from the lo							
Loo	kup V	alues						
×	Line	ListOrder 🖨	Code 🔶	Description 🖨				
	1	1	1	New				
	2	2	2	Good				
	3	3	3	Bad				
	4	4	4	Unusable				

Locker Condition Lookup Table

On the **Lookup** tab, enter **K12.LockerInfo** as the **Namespace** and **Locker_Condition** as the **Name**, and click the **Filter** button.

	~
Reports Business Objects Lookup Views Master Data	
Translation Language German 🔹	
Set the following dropdown and click the Create Default Translation button to create a default translation in the language you have specific translation is accomplished with a computerized engine and will not have the accuracy of a human translator. The translation will be applied that have filter criteria set.	
Translator Engine Language German 🕑 Create Default Translation	
Translation Conditions Summary	
Refresh Condition Status	
Filter Options	۵
Namespace K12.LockerInfo Name Locker_Condition	
Apply Report Filters To Lookups Filter	
Lookups	
Line Namespace Name Code Description Translated Description Lock	Translate
1 K12.LockerInfo LOCKER_CONDITION 1 New Neu	Translate
2 K12.LockerInfo LOCKER_CONDITION 2 Good Gute	Translate
K12.LockerInfo LOCKER_CONDITION 3 Bad Schlecht	Translate
4 K12.LockerInfo LOCKER_CONDITION 4 Unusable Outprauchbar	Translate
Lookup Translations	

Example: Master Data

You can translate names and responses of accommodations for special students in Arizona. On the **Master Data** tab, enter filters as shown here.

∜Trar	nslatio	n			(
Reports	Business	Objects Lookup Views Mas	ter Data		
	n Languag				
translation		blished with a computerized engi	ult Translation button to create a default translation in the language yone and will not have the accuracy of a human translator. The translation		
Translator	Engine La	nguage German 🛛 🔽 Cr	eate Default Translation		
Translatio	on Conditio	ns Summary			
Refre	sh Condition S	tatus 🛛 🛛 Reports 🗌 BO 🗸 L	.ookup 🗌 View 📝 Master Data		
Filter Opt	ions				٥
Filter Gro	up Auto Pop	oulate 🔽 Namespace	e Revelation.AutoPopulate		
Name Rev	AutoPopulat	eResponse 🗸 Auto	Populate AZ.IEP.TestAccomm		
Property '	1 Pro	perty 2 Property 3 Pr	operty 4 Property 5		
Name	V Res	ponse 👻 💌			
Filter					
Data					
Line Row	Property	DataValue	Translation	Lock	Translate
1 1	Name	abacus	Abakus	Ĵ.	Translate
2 1	Response	use of an abacus on math protion by a stuent who is blind	Ein Abakus auf Math Protion nutzen Sie, indem ein Stuent, der blind ist	÷ □	Translate
3 <mark>2</mark>	Name	Alternative Assessments (AIMS-A)	Alternative Beurteilungen (Ziele-A)	1	Translate
		As defined by the Arizona Department of Education, [Student] meets the criteria of a student with a Significant Cognitive Impairment and the criteria on Form 1 of the	Sinne des Arizona Department of Education, erfüllt [Studenten] die	^ _	
4 2	Response	Alternate Assessment Eligibility. The team has determined that [Student] will participate in the state assessment program via the Alternate Assessment Level II.	Kriterien eines Studenten mit einer wesentlichen kognitive	•	Translate

Master Data Translations

Exporting and Importing Translations

You can use the **Translation Import Export** screen to export current translations to share with another district, and to import translations that have been exported.

To export:

- 1. Go to Synergy SIS > System > Setup > Translation Import Export.
- 2. In the **Export File** column for the desired language, click the icon. The translations appear in an XML file in a new window.

∀Translation Import Export														
Ехро	Export/Import													
Lang	uages													0
	(Clear Data			import			во		Report	View	Master		
Line	Clear All	Clear Defaults	Upload File	Delete File	Imported File Language	Process Import	Language	Label Count	Lookup Count	Control Count	Control Count	Data Rows Count	Total Count	Export File
1	Clear All	Clear Defaults	4				Cambodian	0	0	4	0	0	4	July 1
2	Clear All	Clear Defaults	4				Cantonese	2205	55	63	5	62	2390	a a a a a a a a a a a a a a a a a a a
3	Clear All	Clear Defaults	4				Dutch	68	174	110	0	0	352	a a a a a a a a a a a a a a a a a a a
4	Clear All	Clear Defaults	4				French	1690	46	0	5	8	1749	July 1
5	Clear All	Clear Defaults	÷				German	496	4	34	3	54	591	
6	Clear All	Clear Defaults	÷				Greek	25	48	45	0	54	172	ju,
	Translation Import Export Screen													

Translation Import Export Screen

3. On the **File** menu, click **Save as**.

le	Edit	View	Favorites	Tools	Help 🗴 🍕 Convert 🔻 🔂 Selev
	New ta	b		Ctrl+T	
	Duplica	ate tab		Ctrl+K	
	New w	indow		Ctrl+N	ANGUAGE="German">
	New se	ssion			U" ID3="" ID2="ActionOrgGU" ID1="014E0190-F74C-4DA8-BAC1- ="BO"/>
	Open			Ctrl+O	B= " ID2="Address" ID1="014E0190-F74C-4DA8-BAC1-40381E7A8D71"
	Edit wit	th XML	Editor		
	Save				D3=""ID2="Address2" ID1="014E0190-F74C-4DA8-BAC1-
-	Save as			Ctrl+S	="BO"/> ID3="" ID2="AddressGU" ID1="014E0190-F74C-4DA8-BAC1-
-	Close t			Ctrl+W	="B0"/>
	close t			can	Bezirk CTDS" ID3="" ID2="AltDistrictCtds" ID1="014E0190-F74C-4DA8-
	Page se	etup			L" TYPE="BO"/> Allternate Bezirk" ID3="" ID2="AltDistrictCtdsDD" ID1="014E0190-F74C-
	Print			Ctrl+P	ARCHINE BEZIN 103- 102- ARDISTICTCUSDD 101- 014E0190-P74C-
	Print p	review			Schule" ID3="" ID2="AlternativeSchool" ID1="014E0190-F74C-4DA8-
	Send				L" TYPE="BO"/> rung School Code" ID3="" ID2="AltEundingSchoolCode" ID1="014E0190-
					<pre>rung School Code" ID3="" ID2="AltFundingSchoolCode" ID1="014E0190- 381E7A8D71" TYPE="BO"/></pre>
	Import	and exp	οοπ		"" ID2="AltID" ID1="014E0190-F74C-4DA8-BAC1-40381E7A8D71"
	Proper	ties			
	Work o	ffline			nt-ID" ID3="" ID2="CentralPrintID" ID1="014E0190-F74C-4DA8-BAC1-
	Exit				="BO"/> "" ID2="City" ID1="014E0190-F74C-4DA8-BAC1-40381E7A8D71"
Ē	_	ТҮРЕ	="BO"/>		
	<t< td=""><td>R TRA</td><td>NS="Rat</td><td>geber</td><td>Dept Telefon" ID3="" ID2="CounselorDeptPhone" ID1="014E0190-F74C-</td></t<>	R TRA	NS="Rat	geber	Dept Telefon" ID3="" ID2="CounselorDeptPhone" ID1="014E0190-F74C-
		4DA	8-BAC1-	40381	E7A8D71" TYPE="B0"/> Saving a Translation XML File

4. Save the XML file with a recognizable name.

To import:

- 1. Go to Synergy SIS > System > Setup > Translation Import Export.
- 2. In the Upload File column for the desired language, click the icon.

Ехро	Translation Import Export						
Lang	uages	Clear Data			Import		
Line	Clear All	Clear Defaults	Upload File	Delete File	Imported File Language	Process Import	Language
1	Clear All	Clear Defaults					Cambodian
2	Clear All	Clear Defaults					Cantonese
3	Clear All	Clear Defaults	•				Dutch
4	Clear All	Clear Defaults					French
5	Clear All	Clear Defaults	•				German
6	Clear All	Clear Defaults					Greek
	Translation Import Export Screen						

3. Click the Browse button, select the XML language file, and click the Upload button.

Import Translation
Steps To Upload Image: 1) Click Browse and select the file you wish to upload 2) Click Upload
Browse
Upload
Import Translation Screen

4. In the **Process Import** column, click the icon.

YT	✓Translation Import Export							
Ехро	Export/Import							
Lang	luages							
	C	Clear Data			Import			
Line	Clear All	Clear Defaults	Upload File	Delete File	lmported File Language	Process Import	Language	
1	Clear All	Clear Defaults	4				Cambodian	
2	Clear All	Clear Defaults	•				Cantonese	
3	Clear All	Clear Defaults	•				Dutch	
4	Clear All	Clear Defaults	•				French	
5	Clear All	Clear Defaults	•	×	German	19.11.	German	
6	Clear All	Clear Defaults	•				Greek	

Translation Import Export Screen

UPDATES

Synergy SIS > System > Setup > Updates is a read-only screen where you can see the history of software updates applied to your system. Use the scroll buttons or Find mode to locate an update.

The **Log** tab shows the when the update was applied, the user who applied it, and whether any errors or warnings resulted. You can click the **View Log** button to see a detailed log; generally, this is of use to Edupoint support personnel only.

∀Update	S						«
Log Files							
Version Date	Deployment Date	Version	Windows Login	Machine Name	Errors	Warnings	
11/19/2012	11/19/2012 13:45:00	Custom	XNOVAHQ\DKraft	AZDT-DKRAFT1	1	0	
View Log							
			Lindata Company Law	T /			

Updates Screen, Log Tab

The File tab lists all files that were part of the update.

Chapter Ten: RT PROCESS SERVER AND DB TOOLS

This chapter covers:

- ► How to manage the RT Process Server
- ► How to install and use DBTools
- ► Troubleshooting hints for common Synergy SIS issues
- Recommended backup strategies for Oracle databases

RT PROCESS SERVER

The RT Process Server software processes reports and other time-consuming jobs to free up the front-end web server. This improves performance for the end users, and allows jobs to be scheduled separately from a user-generated request. The RT Process server software is generally installed on one or more physical servers separate from the web and database servers.

Each process server can be configured to process jobs from specific web servers or specific organizations. The process server can also be configured to process only certain types of jobs. For example, one process server could be dedicated to the website for the ParentVUE and StudentVUE software and a separate process server could run the jobs for the training web server. To configure the process server:

- 1. Start the RT Process Server software by clicking on the **RTProcessSetup** program icon in the **Edupoint** folder in the **All Programs** menu on the server.
- To modify the default web server information, double-click the **Default** line under Web Sites to Process Jobs. If the settings are not correct for the default website, it may be necessary to first add a web site with the correct information and then delete the initial default site.

RT Process Service Setup File Tools Help	_
	Service - Stopped
Options Advanced Options Monitor	
Web Sites to Process Jobs	
Name Server LIBI	Organization Filtering Custo
Default http://localhost/	Not Filtering
•	
Test Connection(s)	Add Web Site Delete Selected Rows
General Options Polling Interval (in seconds) 5 + Total Worker Threads 4 +	Maximum single job execution time (in minutes) 30 🚎
Job Types to Process	
Dashboard Widgets Other Processes Document Validation Reports	✓ State Reporting ✓ TXP Reports
✓ Form Scanning ✓ Reports - Special Ed ✓ Mass Scheduling ✓ SIF	Walk-In Scheduling
Start Service	OK Undo Apply
RT Pro	cess Service Setup

3. The **Web server/application name** is used to name the web server serviced by the process server. This can be any text.

Jpdate Web Server Settings
Web server/application name:
Default
Enter a URL to a web server to monitor jobs for:
http://localhost/
Organization Filter Settings
Only use this option if you wish to dedicate this process server to specific organizations
Filter by organization (Including their children organizations)

Process jobs for direct parent organizations back to the root organization
Custom Job Types to Process
Test Connection OK Cancel

Update Web Server Settings

- Enter the URL used to access the web server from the process server. If the web server is located on the same server as the process server, the URL will be http://localhost/.
- 5. To process jobs for specific organizations only, check the **Filter by organization** box, and select the organization in the list.

Update Web Server Settings
Web server/application name:
Default
Enter a URL to a web server to monitor jobs for:
http://localhost/
Organization Filter Settings
Only use this option if you wish to dedicate this process server to specific organizations
☑ Filter by organization (Including their children organizations)
Hope High School
Process jobs for direct parent organizations back to the root organization
Custom Job Types to Process
Test Connection OK Cancel

Update Web Server Setting, Filtering By Organization

- 6. To process jobs for all organizations above the selected organization, check the **Process jobs for direct parent organizations back to the root organization** box.
- 7. Enter the names of any **Custom Job Types to Process**, separated by semicolons.
- 8. Once the information has been entered, click the **Test Connection** button to verify the URL.

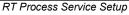
9. In the message box, click OK.



Message Box

10. Click **OK** to save the settings for the web server.

👯 RT Process Servic	e Setup								
File Tools Help									
Process Service - Stopped									
Options Advanced (Dotions Monitor								
r Web Sites to Proce	· · ·								
Name	Server URL	Organiza	ation Filtering Custa						
Default	http://localhost/	Not Filte							
Test Connectio	on(s)	Add Web Site	Delete Selected Rows						
General Options Polling Interval (in	n seconds) 🗧 🚔								
Total Worker Thr		Mauimum single job er	xecution time (in minutes) 30 🗧						
		Maximum single job ex							
Job Types to Proce	ess								
Dashboard Wig		State Reporting							
☑ Document Vali ☑ Form Scanning		✓ TXP Reports ✓ Walk-In Scheduling							
Mass Scheduli									
Start Service			OK Undo Apply						
			Спос прру						



- 11. Process servers can be set up to service more than one web site definition. To add an additional web site, click the **Add Web Site** button.
- 12. To delete a web site, click the row to delete and click the **Delete Selected Rows** button.
- 13. To test all of the websites listed, click the **Test Connection(s)** button.
- 14. To specify how frequently the process server checks for jobs to process, adjust the Polling Interval number. This is the number of seconds between checks. Too small an interval can chew up processor cycles on the server, but too large an interval will force users to wait longer for their reports.
- 15. To specify how many jobs can be processed at the same time, adjust the number of **Total Worker Threads**. Be careful about setting too high a number here, which could greatly slow the server. Generally 4 threads is a good number.

- 16. Adjust the number of minutes a single job may take to process in the Maximum single job execution time box. Most jobs take only a few minutes, but some jobs such as large reports or the new year rollover may take more. To prevent these jobs from taking up all of the time on a particular process server, the number of minutes may be adjusted downward. When running these time-consuming jobs, adjust the number of minutes upward. Generally the new year rollover takes 300 minutes or more. If the job exceeds the number of minutes set, it is not processed and the job is stopped.
- 17. Select the types of jobs to be processed by this process server by checking the boxes in the **Job Types to Process** section.
- 18. Click the **Apply** button to save the settings.
- 19. To start the process server, click the **Start Service** button at the bottom of the window. During the start-up process, the RT Process Service Setup software shows the Process Service as **StartPending** in red at the top of the window.



20. Once the service has started successfully, the bar at the top of the window turns green and the Process Service is shown as **Running**.

📲 RT Process Service Setup	_ 🗆 X
File Tools Help	
Process Service - Running	
Process Service Running	

21. Once the service is running, you can stop it by clicking the **Stop Service** button at the bottom of the window.

To change more options, click the **Advanced Options** tab. These options can clear old jobs from the process server to recover disk space, and provide additional diagnostic messages for jobs that encounter errors. To adjust these options:

1. Click the **Advanced Options** tab.

RT Process Service Setup
File Tools Help
Process Service - Running
Options Advanced Options Monitor
Purge Options
Delete old jobs 4:51:22 PM ;
Delete job results 5 🕂 or more days old and keep non-viewed completed jobs 5 🛧 additional days
(MS-SQL ONLY) Delete job results larger then 0 📩 bytes 1 hour after being viewed. (0 means skip)
Other Options
2.0 Memory for stack in MB (on 64-bit Process Server only). Default is 2MB. Leave at 2MB default unless advised otherwise by Edupoint Technical Support.
Stop Service OK Undo Apply

RT Process Service Setup, Advanced Options

- 2. To set the process server to automatically remove old jobs, check the box next to the time in the **Delete old jobs** field. Adjust the time at which the jobs will be deleted each day.
- 3. Jobs are deleted based on the age of the job. To specify when to delete jobs that have been opened, adjust the number of days listed the first box and all jobs older than that number of days will be deleted. To specify when jobs that have not been opened are deleted, enter the number of days in the second box.
- 4. For districts using Microsoft SQL Server as the database, jobs can also be deleted based on their size. Enter the size of the jobs to be deleted, and all jobs that have been opened over an hour earlier than the purge process runs and that are larger than the size specified will be deleted. Leaving the value at 0 will stop the purge process from evaluating jobs based on size.
- 5. To include additional details in the RT Process Server event log messages, check the box **Extended Log Messages On**. This is generally needed only if trying to diagnose an error or problem with the process server.
- 6. Leave Memory for stack in MB set at 2.0 unless instructed otherwise by Edupoint.

To monitor the jobs currently being processed on the server:

1. Click the **Monitor** tab, which lists each job in process, including the web server that originated ot, the user who submitted the job, and a description.

File	RT Process Service Set • Tools Help	up.		
T IIC		Pr	ocess Service - Running	
i r	Options Advanced Option			
	Current Process Thread			Pause Service
	Server	User ID	Description	
	Arizona	Admin	Student Birthday List - Report data processing begin	
	Stop Service		ОК	Close Apply

RT Process Service Setup, Monitor Tab

 To pause the process server, click the **Pause Service** button at the top of the window. Jobs currently in process will continue to be processed once the service is restarted. If the service is stopped, jobs currently in process will be cancelled, but jobs that have not started yet will be processed.

To control the RT Process service from the Windows Services program instead of the RT Process Setup software:

1. On the Tools menu, click Launch Services.

💐 RT Process Service Setup						
File	Tools Help					
	Lau	nch Services Ctrl+S				
	Launch Event Log Ctrl+E					
Tools Menu						

	🗟 🛛 🖬 🕨 🕨 💷 💷 🕨						
Services (Local)	🔕 Services (Local)						
	Select an item to view its description.	Name 🗠	Description	Status	Startup Type	Log On As	
		Active Directory Ce	Creates, m	Started	Automatic	Local System	
	L	Active Directory Do	AD DS Dom	Started	Automatic	Local System	
		Application Experie	Processes	Started	Automatic	Local System	
		Application Host He	Provides a	Started	Automatic	Local System	1
		Application Informa	Facilitates		Manual	Local System	
		Application Layer G	Provides s		Manual	Local Service	
		Application Manage	Processes i	Started	Manual	Local System	
	L	ASP.NET State Ser	Provides s		Manual	Network S	
		Background Intellig	Transfers f	Started	Automatic (D	Local System	
		Base Filtering Engine	The Base F	Started	Automatic	Local Service	
		Block Level Backup		Started	Manual	Local System	
		Certificate Propaga		Started	Manual	Local System	
		CNG Key Isolation	The CNG k		Manual	Local System	
		COM+ Event System	Supports S	Started	Automatic	Local Service	
		COM+ System Appl			Manual	Local System	
		Computer Browser	Maintains a		Disabled	Local System	
		Cryptographic Serv		Started	Automatic	Network S	
		OCOM Server Proc	Provides la	Started	Automatic	Local System	
		Deep Exec Service	Tronidos Iam	201100	Manual	Local System	
	L	Desktop Window M	Provides D	Started	Automatic	Local System	
		OFS Namespace	Integrates	Started	Automatic	Local System	
		OFS Replication	Enables yo	Started	Automatic	Local System	
	1	OHCP Client	Registers a	Started	Automatic	Local Service	
	1	OHCP Server	Performs T	Started	Automatic	Local System	
		Diagnostic Policy Se			Automatic	Local Service	
	Extended Standard	Sale Policy Se	me biagno	Starteu	Adtomatic	Local believe	

2. Start and stop the RT Process Service in the same manner as any service.

To view any messages regarding the RT Process Service in the Windows Event Log:

1. On the **Tools** menu, click **Launch Event Log**.

RT Process Service Setup					
File	Tools	Help			
		nch Services Ctrl+S			
	Launch Event Log Ctrl+E				
		Tools Menu			

Event Viewer							_ 🗆 🗵		
Eile Action View Help									
Event Viewer (Local)	RTServiceLog	4 event(s)							
Application	Туре	Date	Time	Source	Category	Event	User		
System	Information	11/12/2009	8:04:44 PM	RT_SERVICE	None	0	N/A		
Internet Explorer	Information	11/12/2009	8:04:41 PM	RT_SERVICE	None	0	N/A		
Microsoft Office Diagnostics	Information	11/12/2009	8:04:41 PM	RT_SERVICE	None	0	N/A		
Microsoft Office Sessions	Information	11/12/2009	8:04:41 PM	RT_SERVICE	None	0	N/A		
RTServiceLog									
	•						▶		
Event Viewer									

Event Viewer

2. Navigate to the **RTServiceLog** node. RT Process Service events appear here and not in the Applications node.

To minimize the RT Process Service Setup program to the system tray:

1. On the **File** menu, click **Hide**.



2. Right-click the RT Process Service icon in the system tray to display a context menu.



Shortcut Menu for the RT Process System Tray Icon

To close the entire RT Process Service Setup program:

- Click Exit on the system tray context menu OR
- In the application, click Exit on the **File** menu

The service continues to run in the background, and jobs are still processed.

DB TOOLS

The DB Tools software gives access to run scripts and make other Synergy SIS database changes.

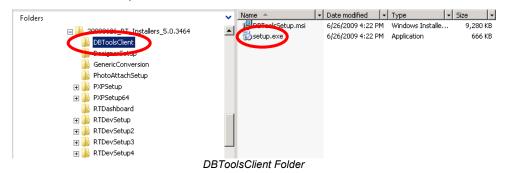


Caution: The computer on which DBTools is loaded must have access to the inetpub folder on a web server through a mapped network drive and also must be able to connect to the database server.

To install the DB Tools software:

- 1. Download or copy the ZIP files containing the latest Synergy SIS release to the computer where the DB Tools program will be installed.
- 2. Extract the files from the ZIP files.

3. In the extracted release folder, find the folder titled **DBToolsClient**. In that folder, double-click the Setup.exe file.



4. In the **Welcome to the DBToolsSetup Setup Wizard** dialog box, click the **Next** button.



Welcome to the DBToolsSetup Setup Wizard dialog box

5. To change the location of the installation, type the new location in the **Folder** box or click the **Browse...** button to locate and select it.

🗗 DBToolsSetup
Select Installation Folder
The installer will install DBToolsSetup to the following folder.
To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".
Eolder: C:\Program Files\Edupoint\DBToolsSetup\ Disk Cost Install DBToolsSetup for yourself, or for anyone who uses this computer:
instali Dibi roolspetup toi yourseli, oi toi anyone who uses this computer.
◯ Just <u>m</u> e
Cancel < <u>B</u> ack <u>N</u> ext >

Select Installation Folder dialog box

- To install the software so that all accounts can use it, click the Everyone option. To keep the software for use by the current account only, click the Just Me radio option.
- 7. Click the **Next** button.
- 8. In the **Confirm Installation** dialog box, click the **Next** button.



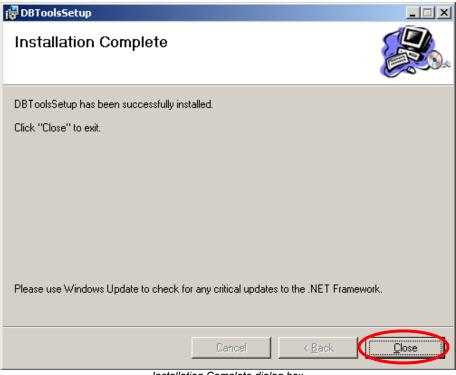
Confirm Installation dialog box

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

🙀 DBToolsSetup			
Installing DBToolsSetu	0		
DBToolsSetup is being installed.			
Please wait			
	Cancel	< <u>B</u> ack	<u>N</u> ext >

Installing DBToolsSetup dialog box

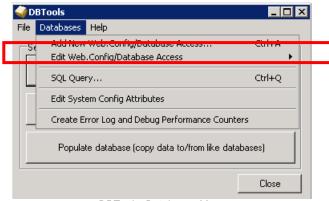
9. In the Installation Complete dialog box, click the Close button.



Installation Complete dialog box

The next major step is to set up the connection to the database server.

- 1. Start the **DBTools** software by clicking on the icon found on the **Start** menu under **All Programs** in the **Edupoint** folder.
- 2. On the Databases menu, click Add New Web.Config/Database Access...



DBTools, Databases Menu

3. Enter a name for this connection (generally the name of the database) in the **Data Access Name** box.

V DatabaseConfig	
Data Access Name	
Arizona	
WebConfig.xml Location	
C:\inetpub\wwwroot\AZ\Web.Config	
Database Type Microsoft SQL Server O Oracle	Connection Information Server (local) Database Revelation
Web Server Options	User ID Schema Owner
Multi-Web Site Installation	Password
 Primary Database in Multi-Web Site Installation Web.Config SSL Setting 	Confirm Password
	Extra Database Connection Parameters
Test Connection	OK Cancel Apply

Database Config Window

4. Select the **WebConfig.xml Location** by clicking the button. This location is generally the C:\inetpub\wwwroot folder on a web server. The file that is loaded is named web.config. Click **Open** to select the web.config file.

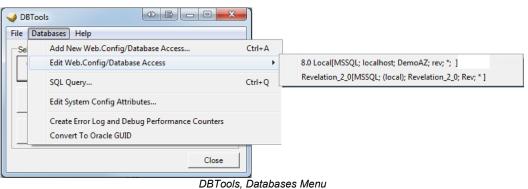
5. The Reload Settings box opens to confirm. Click the Yes button.



- 6. The settings used by the web server to connect to the database are loaded into the **DatabaseConfig** window.
- 7. Make sure the correct **Database Type** is selected.
- 8. If the district has multiple Synergy SIS web servers, check the **Multi-Web Site Installation** box. If the database managed by this connection is the primary production database, check the **Primary Database in Multi-Web Site Installation** box.
- 9. If connecting to a SQL 2005 or 2008 database, enter rev as the Schema Owner.
- 10. In the **Web.Config SSL Setting** list, click **SSL disabled** if the Synergy SIS website uses HTTP, or **SSL Required** if it uses HTTPS. If both HTTP and HTTPS work, or you use the ClassBoard application. click **SSL Enabled**.
- 11. To check the settings, click the **Test Connection** button.
- 12. Click the **OK** button.

To edit an existing database connection:

1. On the **Databases** menu, click **Edit Web.Config/Database Access** and click the database configuration to modify.



2. The **DatabaseConfig** window opens. Edit the connection as outlined in the previous section, and then click the **OK** button to save the changes.

Once the DBTools software can connect to the database, several tasks can be run against the database. On the main DBTools window, three task buttons are available: **Generate script files**, **Execute Script File**, and **Populate database**.

🚽 DBTools 📃 🗖 🗙			
<u>File D</u> atabases <u>H</u> elp			
Select Task			
Generate script files for table creation, key/constraint creation and key/constraint deletion			
Execute Script File			
Populate database (copy data to/from like databases)			
Close			

Main DBTools Window

The **Generate script files** task creates SQL scripts that can be used to create a blank Synergy SIS database based on an existing Synergy SIS database. This can be used to create a test or training database with no data. To generate these scripts:

- 1. Click the **Generate script files** button.
- 2. In the **Source Database** list, select the database connection to use.

GenerateScripts
Database Selection
Source Database
Genesis[MSSQL; SRV-TSC; RTGenesis; rev; *;] Owner: rev, Multi-Web: No, Primary: No
Output Format: C Oracle C MS SQL
Script Files
Table Creation
C:\Program Files\Edupoint\DBTools\Genesis_CTBL.sql
PK, FK, Indexes, Constraints creation
C:\Program Files\Edupoint\DBTools\Genesis_CPK.sql
Delete PK, FK, Indexes, and Constraints
C:\Program Files\Edupoint\DBTools\Genesis_DPK.sql
Begin Close

Generate Scripts Window

- 3. Select an Output Format option to create the scripts in Oracle or MS SQL format.
- 4. To create a script that will create the Synergy SIS tables as they currently exist in the selected databases, check the box under **Table Creation** and edit the location where the script will be created.

- To create a script that will create the primary keys, foreign keys, indexes, and constraints as they exist in the selected database, check the box under PK, FK, Indexes, Constraints creation and edit the location where the script will be created.
- 6. To create a script that will delete the primary keys, foreign keys, indexes, and constraints, check the box under **Delete PK, FK, Indexes, and Constraints** and edit the location where the script will be created.
- 7. Click the **Begin** button to create all selected scripts. The **Script Generation Process** window opens to show the progress of the script generation.

Script Generation Progress	
Processing Table: EGB_ASSESSMENT	
, 	Cancel

Script Generation Progress

8. Click OK to close the Script Generation Successful box.



Script Generation Successful Message Box

The scripts can then be copied or run from the location specified.

The **Execute Script File** task can run any SQL script against the selected database. To run a script:

- 1. Click the **Execute Script File** button.
- 2. Select the database to be changed from the **Source Database** list.

ExecuteScript		E
Source Database		
8.0 Local[MSSQL; localhost; DemoAZ; rev; *;] Owner: , Multi-Web: No, Primary: No		-
Script file to process		
Clear Results	Begin	Close
Execute Script		

- 3. Select the **Script file to process:** Click the button, and find and select the SQL script.
- 4. Click the **Begin** button to run the script.
- 5. Click the **OK** button in the **Script Generation Successful** box.
- 6. If errors are displayed, click the Clear Results button so you can run another script.
- 7. Click the **Close** button.

The **Populate database** task can create the Synergy SIS database structure as well as copy the existing database data to another database. This can be very helpful in creating test or training databases. To copy the database data:

- 1. Click the **Populate Database** button.
- Select the database from which to copy the data using the Source Database list. Then select the database to which the data will be copied from the Destination Database list.

Populate Data			
Database Selection Source Database 8.0 Local[MSSQL; localhost; DemoAZ; rev; *;] Owner: , Multi	-Web: No, Primary: No		
Destination Database			
Revelation_2_0[MSSQL: (local): Revelation_2_0: Rev: *] Process Option Create database structure in destination database - NOTE: Destination database should be empty Selecting the above option will cause the following to be performed: 			
Select Tables To Process Filter Criteria	Enter database prefixes to check or un-check (can be comma delimited list. ex. EP_,REV_PROCESS_QUEUE) Check Un-check		
Clear All	Begin Close		

Populate Database Window

- 3. Select how the data from the source database will be copied to the destination database in the **Process Option** section. Option 1 copies the tables, indexes and overall database structure as well as the data. The destination database must be empty for this option. Option 2 deletes the existing data in the destination database before copying the data. Option 3 just copies the data, appending it to the current contents of the destination database. Option 4 compares the databases but does not copy data.
- 4. Not all of the tables in the source database must be copied. To select which tables should be copied, check boxes on the Select Tables to Process tab. To remove all the selections and start over, click the Clear All button.
- 5. Tables may also be checked and unchecked based on their prefix. To check or uncheck by prefix, enter the prefixes to be modified in the **Enter database prefixes**

box and click the **Check** or **Un-Check** button. Multiple prefixes can be entered, separated by commas. Common prefixes are EGB for the Grade Book tables, EP for the Synergy SE tables, EPC for the Synergy SIS tables, and REV for the system tables.

6. Data can also be filtered by the organization, year, or year type by using the **Filter Criteria** tab. Only records that match these criteria will be copied.

Select Tables To Process Filter C	interia
Organization Name	
School year (ex: 2007)	
Year Type (ex. R)	
	Filter Criteria Tab

7. Click the **Begin** button to copy the data. The Database Update Progress window opens to display the progress of the data copying process.

Database Update Progress		
Processing - EP_COMPLIANCE_PARENT_NOTIFY	139/1056	
	10011000	
		Cancel

Database Update Progress

8. Click the **OK** button in the **Data Update Successful** box to return to the **Populate Data** window.



9. Click the **Close** button.

In addition to the three tasks available from the main **DBTools** window, four additional options are available on the **Databases** menu: **SQL Query**, **Edit System Config Attributes**, **Create Error Log and Debug Performance Counters**, and **Convert to Oracle GUID**.

n 🌍	BTools		
File	Databases	Help	
Se		Web.Config/Database Access .Config/Database Access	Ctrl+A
	SQL Que	ry	Ctrl+Q
	Edit System Config Attributes		
	Create Error Log and Debug Performance Counters Convert To Oracle GUID		
	Popula	te database (copy data to/from like data	abases)
			Close

Databases Menu

SQL Query allows SQL queries to be saved for periodic use. Queries can be constructed by typing them in or by copying and pasting them from another source. While the Execute Script option only allows a query to run that has been saved to a file, this option allows queries to be created on the file and saved as well. To run a SQL Query:

1. On the **Databases** menu, click **SQL Query**. The **Query** window opens.

🐻 Query	_ 🗆 ×
Query Details Source Database Query Type Source Database SELECT Revelation_2_0(MSSQL; (local); Revelation_2_0; Rev; *)	•
Select a Saved Query SQL Query	_
SELECT * FROM REV_BOD_OBJECT	
Save Results To File Exact Data Execute Query	Close



- 2. Select the database connection to use from the Source Database list.
- 3. Choose a saved query from the **Select a Saved Query** list, or begin a new query.
- 4. Choose the type of query to run from the Query Type list. A SELECT query displays the records selected by the query, similar to a report. A NON-SELECT query modifies or deletes data. NON-SELECT queries should be attempted only under the guidance of the Edupoint support team, as they can disable the entire Synergy SIS system.
- 5. Enter the query in the **SQL Query** box. Queries can also be copied and pasted into this box.

6. To save the selected records in a tab-delimited text file, check the box labeled **Save Results to File**. When the query is run, a box opens, prompting for the name and location of the file to be saved.

Organize 👻 📗 Views	🝷 📑 New Folder		(
Favorite Links Documents More >> Folders	Name A bin DevExpress gb_Reports HTML Images js Maint PDF Photos ReportSutput Reports Service SpellCheck	• Date modified • Type • S 11/14/2009 1:39 File Folder 11/14/2009 1:39 File Folder 11/14/2009 1:39 File Folder 11/14/2009 1:39 File Folder 11/14/2009 1:39 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder 10/13/2009 11:3 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder 11/14/2009 1:40 File Folder	ize v
Save as type:			

- 7. Check the **Exact Data** box to include the data with the query when saved.
- 8. To run the query, click the **Execute Query** button.

Edit System Config Attributes modifies various Synergy SIS constants for the entire system. These values should not be modified except when approved by Edupoint support. To modify these system options:

1. On the **Databases** menu, click **Edit System Config Attributes**.

😥 System Options
Source Database
80 Loca[MSSQL;localhost; DemoAZ; rev; *;] Owner: , Multi Web: No, Primary: No
Data to Change
Install Constant
System Options
<pre><kr></kr> </pre> <cod <="" app_vnum="8.0.0" conversion_phase="version_complete" customer="usa.a" license_key="4cahsalsdpefwskenpja" localizat="" p="" schema_version="10001" ~=""> <novigation_vies="weilation="how vigation_deerablize="licenses"></novigation_vies="weilation="how> <cod customersion="licenses">(Novigation_deerablize="licenses") <cod customersion="licenses"></cod> <cod customersion="licenses">(Novigation_deerablize="licenses") <cod customersion="licenses"></cod> <cod <="" customersion="licenses" p=""> <cod customers<="" td=""></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod></cod>
) «)
SQL Trace Settings
Capture Stack Trace (only works if SQL is being tracked)

System Options Window

- 2. Select the database to be changed from the **Source Database** list.
- 3. Select the type of information to modify from the **Data to Change** list. **Install Constant** is used during the system installation or upgrade process, and **Application Constant** is used when running the web server application.
- 4. Edit the data in the **System Options** box.
- 5. Under SQL Trace Settings, configure trace settings to your needs.
- 6. Click the **Save** button to save the changes.

7. Click the **Close** button.

Create Error Log and Debug Performance Counters creates Windows performance counters on the server to monitor server performance. To create the log and counters:

- 1. On the **Databases** menu, click **Create Error Log and Debug Performance Counters.**
- 2. Click **OK** to close the **Success** message box.



Success message box

Convert to Oracle GUID helps with the transition from a SQL Server-based setup to an Oracle-based setup. To convert all GU in SQL (unique record ID) to Oracle GUID:

1. On the Databases menu, click Convert To Oracle GUID.

🔛 Convert To Oracle Guid	
Sql Server	
l l	Convert
1	

Convert to Oracle GUID

- 2. Enter the names of the Sql Server and Oracle server.
- 3. Click the **Convert** button.

TROUBLESHOOTING HINTS

While the Edupoint support team is always happy to assist districts, two common problems can be easily resolved by following the steps below.

If the RT Process Server will not start with any configuration but it can connect to the web server, check the size set for the RT Service log. To check the log size:

- 1. On the server, start the **Event Viewer**.
- 2. Right-click the **RT Service Log** in the left column, and select **Properties**.
- 3. In the Maximum log size: field, enter 2048 or greater.

- 4. Click the Overwrite events as needed option.
- 5. Click the **OK** button.

After restoring a database from a backup file such as the Demo Database, the "rev" user may not work when trying to connect to the database. To resolve this problem, run the RevUser SQL query available for download on the Edupoint FTP site. To run the query:

- 1. Download the **Rev_User.sql** (SQL 2000) or **RestoreRevUser2005.sql** (SQL 2005/2008) file from the _Support folder on the FTP site.
- 2. Start SQL Server Management Studio for SQL 2005/2008 or run SQL Query Analyzer in SQL 2000.
- 3. On the **File** menu, click **Open**.
- 4. Choose File and browse to select the RevUser.sql (SQL 2000) or RestoreRevUser2005.sql (SQL 2005/2008) file.
- 5. Change the **database** listed in the menu to the database that needs to be fixed.
- 6. Click the **Execute** or **Run** icon (the green arrow) to run the query.

Recommended Backup Strategies for Oracle

Before creating an Oracle database, decide how to protect the database against potential failures. Answer the following questions before developing a backup strategy:

Is it acceptable to lose any data if a disk failure damages some of the files that constitute a database?

If it is not acceptable to lose any data, the database must be operated in ARCHIVELOG mode, ideally with a multiplexed online redo log. If it is acceptable to lose a limited amount of data if there is disk failure, the database can be operated in NOARCHIVELOG mode and avoid the extra work required to archive filled online redo log files.

Will there ever be a need to recover to arbitrary past points in time?

If there may be a need to recover to a past point in time to correct an erroneous operation or programmatic change to the database, be sure to run in ARCHIVELOG mode and perform control file backups whenever making structural changes. Recovery to a past point in time is facilitated by having a backup control file that reflects the database structure at the desired point-in-time.

Does the database need to be available at all times, 24 hours a day, seven days a week?

If so, do not operate the database in NOARCHIVELOG mode because the required whole database backups, taken when the database is shutdown, cannot be made frequently, if at all. Therefore, high-availability databases always operate in ARCHIVELOG mode to take advantage of open data file backups.

Methods for Oracle Database Backups

• **Export/Import** – Exports are "logical" database backups in that they extract logical definitions and data from the database to a file.

- Cold or Offline Backups Shut the database down and back up ALL data, log, and control files.
- Hot or Online Backups If the database is available and running in ARCHIVELOG mode, set the tablespaces into backup mode and back up their files. Also remember to back up the control files and archived redo log files.
- **RMAN Backups** While the database is offline or online, use the "RMAN" utility to back up the database.

It is advisable to use more than one of these methods to back up an Oracle database. For example, if running online database backups, perform database exports as well. Ensure that ALL backup and recovery scenarios are tested carefully. Regardless of the strategy used, also remember to back up all required software libraries, parameter files, password files, etc. If the database is in ARCHIVELOG mode, also back up archived log files.

Chapter Eleven: REPORTS

This chapter covers:

- ► Available staff reports
- ► Available user reports

Four reports show staff and user data.

- Synergy SIS > Staff > Reports > List > TCH401 Staff Directory
- Synergy SIS > System > User > Reports > PRF601 User Performance Statistics
- Synergy SIS > System > User > Reports > REV401 User Group User List
- Synergy SIS > System > User > Reports > REV402 User List



Reference: For information about customizing all Synergy SIS reports, including options on all report interface tabs other than **Options**, see the *Synergy SIS – Query & Reporting Guide*.

TCH401 – STAFF DIRECTORY

The TCH401 - Staff Directory report provides an alphabetical listing of the staff by last name that includes email addresses, home addresses and phone numbers.

Scheel District		Hope High School Staff Directory					Year: 2009-2010 Report: TCH401			
Staff Name	Gen	E-Mail	Туре	Phone	Extn	Home Address	City	St	Zipcode	
Maintenance										
McGrew, Tom	м	tracgrew@ edupoint.com	Work	450-455-0900	222	1550 E McKellips	Phoenix	AZ	85694	
User, Test	м	tesi@edupoint. com								
User, TXP Admin	F	trp@edupoint. com								
User, TXP Report	۴	top@edupoint. com								
Weathers, Julia	۴	Julia Weathers @edupoint.com	Work	480-833-2900	507	1550 E McKellips Rd	Phoenix	AZ	85694	
Weathers, Renee	۴	Renee. Weathers@ edupoint.com								
Teacher										
Ademon, Gordon	м	GAderson@ ess.k12.org	Cell	623-555-4758						
Adm Office, Adm Office	м	stangedu.com								
Andrews, Mark	м	MAndrews@ ess.k12.org								
Arthur A., Andrea	۴	AArthur A.@ses.k12. org								
Altend Office, Attend Off	м	AAltend Office@ees. k12.org								
Abwood S., Sharon	۴	SAbvood S.@ses.k12. org								
Audio Visual, Audio Visual	м	AAudio Visual@ees. k12.org								
Baniszewski, Nancy	F	NBaniszewski Gees.k12.org								
Bayer M., Michelle	۴	MBayer M.@sea.k12. org								
Becker A., Allson	۴	ABecker A.@ses.k12. org								
Becker C., Chris	м	CBecker C. gees.k12. org								
Behm A., Argela	۴	ABehm A.@ses.k12. org								
Bellus G., Genice	м	GBellus G.@ecs.k12. org								
Blackburn M., Malt	м	MBlackburn M.@sea.k12. org								
Blahak P., Pete	м	PBlahak P.@ses.k12. org								
Bladel W., Wendy	۴	WBlasdell W.@ees.k12. org								
Bonjour R., Richard	м	RBonjour R. gees.k12. org								
Bookatore, Bookatore	м	BBookstore@ ess.k12.org								
Bordwell R., Robert	м	RBardwell R.@eea.k12.								

TCH401 – Staff Directory Report

The report can be customized using the following options:

∀Rep	ort Inter	face		
Name: Sta	ff Directory	Number: TCH401	Page Orientatio	on: Portrait
Options	Sort / Output	Conditions	Selection	Advanced
Staff Info				
Gender	Туре			
	*	*		
Address T	Туре			
	*			

Options Tab

- In the **Gender** list, click **Female** or **Male** to limit the report to those employees, or leave the box blank to include both female and male employees.
- In the **Type** list, select a single type of employee, if desired.
- In the **Address Type** list, select a type of address, or leave the box blank to print both types.

PRF601 – User Performance Statistics

The PRF601 – User Performance Statistics report is a summary report of the number of times data was accessed and for how long. It provides a count, a minimum and maximum number of seconds the system was accessed and an average of the access time.

Process: Sor	atmet			e High School formance Statis	tics	Year: 2009-2010 Report: PRF601	
	a		Number of Seco				
Process Date 04/26/2006	Count 5	Average 0.422	Minimum 0.250	Maximum 0.609			
04/27/2006	21	0.391	0.094	2.344			
05/02/2006	8	0.725	0.203	2.078			
05/03/2006	86	0.725	0.047	6.516			
05/04/2006	20	0.927	0.047	6.859			
05/05/2006	5	0.147	0.016	0.188			
05/16/2006		2.891					
05/16/2006	1	1.152	2.891	2.891 3.578			
05/30/2005	4	2.418	0.359	7.313			
0//11/2006	1	0.938	0.535	0.536			
Printed by Admir	User at 11/05/20	09 1:24 PM	Ed	upoint School District		P	age 2 of 2
		llse	r Performa	nce Statistics Re	port		

User Performance Statistics Report

There is no **Options** tab with customizations for this report.

REV401 – USER GROUP USER LIST

The REV401 – User Group User List report provides an alphabetical listing of the roles, such as Admin or Clerk, and the staff members included in each role. It also includes user name, login name and email address, and indicates whether the user is set up to use the menu group configured for the user group.

Edupoing Strait Dients			2009-2010 t REV401
	-	CONFIDENTIAL -	Use Menu
Ucer Name	Login Name	Email	Group
User, Teacher	teacher	teacher@edupoint.com	2
Test Group			
User, Test	test	test@edupoint.com	2
Update - Adams Elementary			
Rapisura, Michael	Tch2	tch@edupoint.com	
Wilson, Rob	rwilson	rwison@edupoint.com	
Carrol, Natale	tch	tch@edupoint.com	
Weathers, Renee	Renee	Renee.Weathers@edupoint.com	2
Fuller, Rebecca	tch3	rfuller@anywhere.com	
McGrew, Tom	traconew	tmcgrew@edupoint.com	
Casey, Ken	tch6	kcasey@schools.org	
Update - Continuation High So	hool		
Hagen, A	tchc	alhagen@schools.org	
Update - District			
User, Teacher	teacher	teacher@edupoint.com	
Harker, Garth	gharker	gharker@my.com	
Hom, Clasy	chom	a@!	
User, Test	test	test@edupoint.com	
Weathers, Renee	Renee	Renee.Weathers@edupoint.com	2
Borgen, Jessica	cierk	JBorgen@Adams.com	Ð
Weathers, Julia	Julia	Julia Weathers@edupoint.com	
McGrew, Torn	tricgrew	tmcgrew@edupoint.com	
Wilson, Rob	rwilson	rwison@edupoint.com	
Update - Grant Elementary			
Carrol, Natale	tch	tch@edupoint.com	
Update - Hope High School			
Sullvan, Joe	tchs2	tchs2@edupoint.com	2
Wison, Rob	nellson	rwison@edupoint.com	
User, Test	test	test@edupoint.com	
User, Teacher	teacher	teacher@edupoint.com	
Jackson, Kathy	tchs	kjackson@a.k12.ca.us	
View - Adams Elementary			
Printed by Admin User at 1105/200	10-00 DM E4	apoint School District CONFIDENTIAL	Page 2 of 2

REV401 – User Group User List Report

There is no **Options** tab with customizations for this report.

REV402 – USER LIST

The REV402 – User List report provides an alphabetical listing of the users that includes user name, login name, and email address. It also lists the user groups assigned to the user, and indicates which user group's menu is used.

School District		Kennedy High Schoo User List		Year: 2009-2010 Report: REV402
		- CONFIDENTIAL -		
User Name	Login Name	Email	Use Menu Group	User Group Name
Borgen, Jessica	clerk	JBorgen@Adams.com		Role - Attendance Daily
				Update - District
				Role - Clerk
				Role - Genesis User
Carroll, Natalle	tch	tch@edupoint.com		Update - Adams Elementary
				Update - Grant Elementary
			_	Role - Teacher Elementary
Casey, Ken	tch6	kcasey@schools.org	1	Role - Teacher Elementary
Fuller, Rebecca	tch3	rfulier@anywhere.com	_	Update - Adams Elementary Role - Teacher Elementary
Fuller, Repecca	tens	nuler@anywhere.com	\sim	
Grayson, Nicolas	NGrayson	NGrayson@Adams.com		Update - Adams Elementary
Green, Tom	TGreen	TGreen@Adams.com	Ë	
Growan, Rachael	RGrowan	RGrowan@Adams.com	H	
Hagen, Al	tchc	alhagen@schools.org		Role - Teacher Secondary
			<i>v</i>	Update - Continuation High School
Harker, Garth	gharker	gharker@my.com	2	Role - Admin
	-			Update - District
Horn, Clasy	chom	3QI		Update - District
				Role - Admin
Hyde, Kathy	kathy	khyde@edupoint.com		
Jackson, Kathy	tchs	kjackson@a.k12.ca.us	1	Role - Teacher Secondary
Martinez, Alberto	amartinez	amartinez@school.org	_	Update - Hope High School
McGrew, Tom	tricorew			Role - Admin
Moorew, rom	uncyrew	tmcgrew@edupoint.com	1	Update - Adams Elementary
				Update - District
				Role - Clerk
Rapisura, Michael	Tch2	tch@edupoint.com	\checkmark	Update - Adams Elementary
			_	Role - Teacher Elementary
Smith, Jk	jksmith	jksmith@edupoint.com		
Smith, John	JSmith	JSmith@Adams.com		
Sullvan, Joe	tchs2	tchs2@edupoint.com	1	Update - Hope High School
			_	Role - Teacher Secondary
User, Admin	Admin	admin@edupoint.com		
User, Teacher	teacher	teacher@edupoint.com		Update - District
				Role - TXP Period Attendance
User, Test	test	test@edupoint.com		Update - Hope High School Test Group
user, reac	UC2N	resigned apoint com	1	Update - District
				Update - Hope High School
Volrin, Cheryl	cvoirin	cheryl.voirin@edupoint.		and a second sec
		com	_	
Weathers, Julia	Jula	Jula.Weathers@edupoint. com	1	Role - Admin
		Lom		Role - Genesis User
				Update - District

REV402 – User List Report

There is no **Options** tab with customizations for this report.

Chapter Twelve: SECURITY

This chapter covers:

► Where security for system-related screens may be defined

Security for each of the screens discussed throughout this manual is defined by two options: Synergy SIS > System > Security > PAD Security and Synergy SIS > System > Security > Security Definition. How these screens work and how security is defined is covered in detail in the Synergy SIS – Security Administrator Guide. This chapter outlines where the security for each part of each system-related screen may be defined in the Security Definition screen.

STAFF SECURITY

The **General** tab of **Synergy SIS > Staff > Staff** is controlled by this security node:

√Staff								~
	Teacher Type: Teacher							~
	ls SpecialEd Emergen	v Credentials						
Last Name	First Name	Middle Name	Suffix	Gender	Туре			
User	Teacher			Female	🔽 Teache	er 🔽		
Staff Info							🛇 Staff Role	Q
		I Security Numbe	er Badge N				Role Type	
	User, T. 333-3	3-3333	3	12	3456		Audiology	
		E-Mail 😥					Conference	e
		teacher@edupoint					I Discipline I Health	
	Birth Date Birth Pl			ducation L	.evel		1. The and the	
	06/27/1972 📅 Kentuci	(y	Master's	degree	×			
Race and Ethnicit	-							٨
	Resolved Race/Ethnicity							
	Hispanic 🔽							
Race⊖⇔⊘								
White 🗖 Black		tive American						
🗆 Asian 🗖 Pacifi	ic Islander/Hawaiian 🗖 De	clined to State						
Home Address				l Address				٨
Address			Add	ress				
123 S Main								
City	State ZIP Code + 4		City			Zip Code +	4	
Phoenix	AZ 🔽 85004				×			
Map it!			Ma	p it!				
Phone Numbers							Add	
X Line Primar		Phone	Ş	Ex	tension	🔶 Conta	v	
1 🗹	Home 💙	480-555-1212				F		
Other Info								0
	Current Exit Date 🗖 Exc	lude From State	Reporting	🗖 Do Not	Display in Par	ent∨UE		
07/26/2006								
	tatus Default Job Class D				District Perso	onnel		
Tenured	Y Teacher (K12) Y A	ny humanities cou	urse 🚩 🏾 1	00				
	ears Of Educational Serv	ce						
5 1	4							
Ell Indicator	Language Of	Instruction						
Primary language	English	~						
Default Support T	ype						Add	
× Line			Support	Туре				Ş
1 Counsel	or	~						
Former Names								٨
Last Name	First Name	Middle Na	ame Suf	ïx				
L								
Address History								٢
Employment Histo	ory						Add	
X Line	Hire Date		Ş			Exit Date		¢
1 07/26/20	06 🕎				P			

K12.Staff

General Tab, Staff Screen

The security node **K12.StaffDefaultSupportType** controls the **Default Support Type** section.

The security node K12.StaffRole controls the Staff Role section.

The Credentials tab of the Staff screen is controlled by the following security nodes:

- K12.StaffCredential controls the Teacher Credentials section.
- K12.StaffELLAuth controls the ELL Authorization section.
- K12.StaffCourseQualification controls the Highly Qualified By Course section.
- K12.STAFFAdditionalJobClasses controls the Additional Job Classes section.

∀Staf	f												~
Staff Name	: User, Teach	ier Type: Tea	cher										
General	Schools Spe	ecialEd Em	ergency	Credentials									
Last Name		First Name		Middle Name	Suffix	Gender	Туре						
User		Teacher				Female	🔽 Teacher	*					
Teacher C	Credentials											Add	
🗙 Line	Teaching /	Area 🔶		Credenti	al Type		⊜ Date	Earned	\Leftrightarrow		Document Ni	ımber	\Leftrightarrow
1	Adult Ed	~	Full crea	dential	~		06/15/1992	P		13458872			
ELL Autho	orization											Add	
X Line		Ell Aut I)ate		\			Ell A	Aut Type				Ş
1	07/25/2005	P			Auth	iorized teache	· •						
Highly Qu	alified - By Co	urse									Add	Choose	r 🔇
X Line	Course ID And Ti	tie							Qual Met	ihod			Ş
1	SS03C - Soc S	Studies 🔶				Yes, us	ing HOUSSE	*					
2	SS03A - Surviv	/al Skills ←				Yes, us	ing HOUSSE	*					
3	SS03B - Soc S	ikills 🗲				Yes, us	ing HOUSSE	*					
Additiona	l Job Classes										Add	Show Det	ail 🔕
🗙 Line	Start	Date	\Rightarrow	End Date		\Rightarrow	Job Class	Ş	Fte	Ş	Orga	nization	Ş
	08/10/2009	P		P		Teacher	(Adu 🔽	0	.25		Kennedy Hiç	gł 🔽	

Credentials Tab, Staff Screen

The security node **K12.StaffAdditionalJobSupportType** controls the detail screen of the **Additional Job Classes** records.

Additional Job Classes	Add Hide Detail
Line Start Date	
1 12/14/2009 🐨	
	Start Date Job Class Fte Organization
	12/14/2009 🗊 📅 Teacher (Ad 👻 0.25 Hope High School 👻
	Support Type
	Therapist Superintendent Counselor
Detail View	Additional Job Classon Cradential Tab Staff Saraan

Detail View, Additional Job Classes, Credential Tab, Staff Screen

The following security nodes do not provide a visible change in security on the **Staff** screen:

- K12.StaffYearReport
- K12.StaffyearReportAssign
- K12.StaffDepartment
- K12.StaffFindList
- K12.StaffFindSelect
- K12.StaffSchoolYear
- K12.StaffSectionGrid
- K12.StaffUI

ANNOUNCEMENT TREE SECURITY

Synergy SIS > System > Announcements > Announcement Tree is controlled by the following security node:

✓Announcement Tree						~
Announcement Tree						٥
 Edupoint School District 1. Elementary Schools 2. Middle Schools 	Anr	ounc	ements			
▼ 3. High Schools	Ann	ounc	ements		Add	Show Detail 🔕
 Hope High School Kennedy High School 	×	Line	Expire Date	Announcement		
O King High School O King High School ▶ 4. Special Schools			03/06/2009 🍞	The parking lot will be closed 7:00pm on Friday to 6:00a for re-paving.		y V
		2	03/06/2009 🚏	REQUIRED ATTENDANC training will take place right today in the East Gym for members.	ht after schoo	

Revelation.Announcement.RevAnnouncement

Announcement Tree Screen

The following security nodes do not provide a visible change in security on the Announcement Tree screen:

- K12.POVInfo.AnnouncementGrid
- K12.POVInfo.POVMainUI
- K12.POVInfo.TaskGrid
- Revelation.Announcement.RevAnnouncementGridUI
- Revelation.Announcement.RevAnnouncementTree
- Revelation.Announcement.RevAnnouncementUser

REPORT INTERFACE CHANGE SECURITY

Synergy SIS > System > Data and Views > Report Interface Change is not controlled by any security node.

Menu 🔻 🔇 🌒 🛞 🛛 💭 🛛 Find 🛛 Ur	ndo	Status	: Ready 🖓 🖓 🛐
	~		
Namespace: Number: Name:			
Modifications			
Namespace	Number	Name	
Report Interface Modifications			Action 🔽 🔇

Report Interface Change Screen

The following security nodes do not provide a visible change in security on the **Report Interface Change** screen:

- Revelation.ReportDef
- Revelation.ReportDefChange
- Revelation.ReportDefChangeTree
- Revelation.ReportDefGroup
- Revelation.ReportDefSubReport

USER DEFINED DATA SECURITY

Synergy SIS > System > Data and Views > User Defined Data is not controlled by any security node.

Menu V 🔇 🛞 🧊 Find Undo Add Delete	Form Status: Find 🔊 🖓 🏹
VUser Defined Data	(«
User Defined BO and Table:	
Basic Info Properties	
Name DB Table Name	
Update Information	<u></u>
Last Synch Date Time Last Changed Date Time	
Synchronize Database	
NOTE: Clicking the Synchronize Database button will apply any and all changes made to this user defined	table and business object.
Parent Object Relation	۵
Name Relation Type	
Other Info	(۵
Add the change stamp and user ID tracking	
Query Display Type	
Lloar Defined Data Saraan	

User Defined Data Screen

VIEW CHANGE SECURITY

Synergy SIS > System > Data and Views > View Change is controlled by this security node:

Revelation.ViewDefChgTree

Menu 🕶 ≪ 🍳 🍉 🚎	Find Undo	Form Status: Find 🛛 😂 🖓 🙀	
View Change			(«
View Name: Localization:			
Modifications Other Info			
Namespace	Name		
View Modifications			Action 💌 📀
		4 0	

View Change Screen

The following security nodes do not provide a visible change in security on the **View Change** screen:

- Revelation.ViewDef
- Revelation.ViewDefChange

SCHOOL SETUP COPY SECURITY

The Select Schools to Copy To grid of Synergy SIS > System > Data Maintenance > School Setup Copy is controlled by this security node:

K12.Setup.SchoolSetupCopyGrid

Menu 🗸 Update Setup	Form Status: Ready (Update Mo	(ek	r.
School Setup Copy			
School Year: 2009-2010			
Configure Setup Copy/Update			
School to Copy From			
▼			
Select Modules to Copy/Update			0
Modules →			
Attendance			
E Basic School Setup			
Course			
Discipline			
E Fees			
Grading			
Groups			
Master Schedule			
Parent Experience			
Select Schools to Copy To		Choose	er 🔇 🔕
X Line Organization Name	School Type		

School Setup Copy Screen

The following security nodes do not provide a visible change in security on the **School Setup Copy** screen:

K12.Setup.SchoolSetupCopyUI

ATTENDANCE SCAN SHEET BACKUP SECURITY

Synergy SIS > System > Scanning > Attendance Scan Sheet Backup is not controlled by any security node.

Attendance	ce Scan Shee	et Backup				
Organization Name:						
Attendance						
Organization Name			Restore Sheet			
Restore Sheet" bu		ican Sheets: Seler	ct a row in the "Pre	vious Scan Sheet"	grid. Then click th	e
Restore Sheet" bu	ton. Id For Scanning		ct a row in the "Pre		grid. Then click th	e
Restore Sheet" bu Current Sheets Val	ton. Id For Scanning Date Rang	i)e		Sheet Range	grid. Then click th	IE
Restore Sheet" bu Current Sheets Val	ton. Id For Scanning Date Rang		ct a row in the Pre		-	IE
Restore Sheet" bu Current Sheets Val X Une Start Date	ton. Id For Scanning Date Rang	ge nd Date		Sheet Range	-	
Restore Sheet' bu Current Sheets Val	tori. Id For Scanning Date Rang Er	ge nd Date	Start	Sheet Range	-	

Attendance Scan Sheet Backup Screen

The following security nodes do not provide a visible change in security on the **Attendance Scan Sheet Backup** screen:

- Revelation.Scanninginfo.ScanningInfo
- Revelation.Scanninginfo.ScanningUI
- Revelation.Scanninginfo.ScanningUserDefined
- K12.SystemInfo.ScanSheetHoldingInfoMaint
- K12.SystemInfo.ScanSheetHoldingInfoMaintUI

GRADING SCAN SHEET BACKUP SECURITY

Synergy SIS > System > Scanning > Grading Scan Sheet Backup is not controlled by any security node.

Menu 🕶 🎯 🎯 🛛 Save Undo	F	orm Status: Renaly (Uplinte Molie)	ی 🖓 دی 🕲
Grading Scan Sheet Backup			(ex
Organization Name: Grant Elementary			
Grade Report Sheets Progress Report Sheets			
Organization Name			
Grant Elementary			
NOTE: To restore previous Grade Scan Sheets: Selec click the "Restore Sheet" button.	t a row ir	n the "Previous Scan Shee	t" grid. Then
Restore Sheet			
Previous Scan Sheets (for restoring only)			٩
Line Grade Period		Sheet Range	
	Start	End	
Current Sheets Valid For Scanning		8	now Detail 🥥
Line Grade Period		Sheet Range	
	Start	End	

Grading Scan Sheet Backup Screen

The following security nodes do not provide a visible change in security on the **Grading Scan Sheet Backup** screen:

- K12.SystemInfo.GrdScanSheetHoldingInfoMaint
- K12.SystemInfo.GrdScanSheetHoldingInfoMaintUI

AUTO POPULATE SECURITY

Synergy SIS > System > Setup > Auto Populate is controlled by the following security node:

Revelation.AutoPopulate.RevAutoPopulate

Auto Populate	Form Status: Ready (Update Hode) 🤤 🖓 🕻
Noto Populate	Action
AZ ParentNot/Itcation StudentEP	

Auto Populate Screen

The following security nodes do not provide a visible change in security on the **Auto Populate** screen:

- Revelation.AutoPopulate.RevAutoPopulateResponse
- Revelation.AutoPopulate.RevAutoPopulateTree

DISTRICT SETUP SECURITY

Synergy SIS > System > Setup > District Setup is controlled by this security node:

K12.Setup.DistrictSetup

VDistrict Setup	(
District Setup	
Options System Grade Setup Teacher/VUE Labels Auto-Sequence Reports Waivers Mobile Apps	
Current System Year 🔗 Year Permissions 🔗 Summer School	G
Current Year Base Year Previous Year(s) Permission Current Year Permission Next Year(s) Permission Summer School Year Summer School	І Туре
2010-2011 💙 2006 Update 💌 Update 💌 Update	*
Organization Year Tree Action	- 0
▶ 2005	
▶ 2006	
▶ 2007	
> 2008	
▶ 2009	
> 2010	
▶ 2011	
2012	
2013	
Staff Years	6
Last Staff Year Increment Date	
District Setup Options	0
Line Setup Options	
1 District Accommodation Setup	
2 District Discipline Options	

District Setup Screen

The Grade Setup tab of the District Setup screen is controlled by this security node:

		ict Set	<u>чр</u>								
	t Setup:										
Opti			Grade	Setup Te	acherVUE	Labels	Au	to-Sequence	Reports	Waivers	Mobile Apps
	uation	Grade									
12		¥									
Grad	uation	Requireme	ents Ye	ear Calcula							
						*		1			
Grad	les			Years Unti			0				
Line	Grade	Next Grade		Graduation		A Group					
	PS	К	~	13			~				
2	К	01	*	12	K		*				
	01	02	*	11	01	-03	*				
4	02	03	*	10	01	-03	~				
5	03	04	~	9	01	-03	~				
	04	05	~	8	04	-06	~				
	05	06	~	7	04	-06	~				
	06	07	*	6	04	-06	*				
9	07	08	~	5	07	-08	~				
	08	09	~	4	07	-08	~				
	09	10	*	3	09	-12	~				
12	10	11	*	2	09	-12	~				
	11	12	*	1	09	-12	~				
14	12		*	0	09	-12	~				
15	12+	[~				110				

K12.Setup.DistrictGradeGrid

District Setup, Grade Setup Tab

The **Reports** tab of the **District Setup** screen is controlled by the security nodes:

- K12.Setup.DistrictReportDefOptions controls the Footer Boiler Plate box.
- K12.Setup.DistrictReportDefOptionsGrid controls the Report Options grid.

	T
✓District Setup	(4
istrict Setup	
Options System Grade Setup TeacherVUE	Labels Auto-Sequence Reports Waivers Mobile Apps
Report Options	Chooser 🔇
X Line Report	- Show Footer Boiler Plate
Number Name	
ooter Boiler Plate 🕎 🤡	
	A
Phone Number Options	Q
Mask Phone Numbers	
Mask unlisted phone numbers 🛛 👻	

District Setup Screen, Reports Tab

The Waivers tab of the District Setup screen is controlled by the security nodes:

- K12.Setup.DistrictCourseWaiverArea controls the Subject Area Waivers grid.
- K12.Setup.DistrictCourseWaiverColl controls the College Waivers grid.
- K12.Setup.DistrictCourseWaiverUniv controls the University Waivers grid.

∀Dist	rict Se	etup								«
District Setu	up									
Options	System	Grade Setup	TeacherVUE	Labels	Auto-Sequence	Reports	Waivers	Mobile Apps	5	
Subject A	Area Waive	ers							Add	
X Line	Orde	er 🍦	Waive	Credit Fro	m 🗧		Transfe	r Credit To		\Leftrightarrow
College V	Naivers								Add	
X Line	Orde	er 🔶	Waive	Credit Fro	m 🗧		Transfe	r Credit To		\Leftrightarrow
University	y Waivers								Add	
X Line	Orde	er 🔶	Waive	Credit Fro	m 🗧		Transfe	r Credit To		Ş

Waivers Tab, District Setup Screen

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

- K12.Setup.DistrictGrade
- K12.Setup.TextYear

EMAIL CONTENT SECURITY

Synergy SIS > System > Setup > Email Content is controlled by the following security node:

Revelation.EmailContent

The Content Sections section is controlled by the node Revelation.EmailContentValue.

Y	PEmail Content									
	1									
Con										
Cont	ent Namespace	Content Key	Default Language							
PXP		MainBulk	English	~						
Con	tent Sections				Add	Show Detail 🔕				
$ \mathbf{X} $	Line		Langua	ge		¢				
	1 English		~							
	2 Spanish		~							

Email Content Screen

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

- Revelation.EmailContentValueUI
- Revelation.EmailQueue

FREQUENCY UNIT SECURITY

Synergy SIS > System > Setup > Frequency Unit is not controlled by any security node.

Menu 🗸 🔇 🛞 🧊 Find Undo Add Delete		
✓Frequency Unit		
Frequency Unit		
Basic Time Unit Multiply Factor Description		
Frequency Unit Screen		

LABEL DETAIL SECURITY

Synergy SIS > System > Setup > Label Detail is not controlled by any security node.

Menu V 🔇 🔇 😹 Find Undo Add Delete	Form Status: Find
∀Label Detail	(«
Code: Description:	
Label Dimensions Options	
Code Description	-
Side margins Top margin Horizontal pitch Vertical pitch Number Number across	
Top Margin (in.)	
Side Margin (in.)	
Vertical Pitch (in.) Number Across	
Horizontal Pitch (in.) Number Down	
Page Size	
Page Orientation	
Row Height defines height of value fields for a given row. If blank the system calculates the height automatically. The Row Spacing is the defined height of blank space between two rows. If blank row controls align top and bottom.	
Row Height	
Row Space	
Label Detail Scre	en

LOOKUP TABLE DEFINITION SECURITY

Synergy SIS > System > Setup > Lookup Table Definition is controlled by this security node:

Revelation.LookupDef.LookupTableValue

Mana 🖷 🙀 Sever Unio	Form Same - Roady (Sprain Roady) 😅 🖓 🚽
VLookup Table Definition	(e)
Lookup Table Maintenance	0
D 40	
FIZAZINIAN	
Fillemeters at:	
KENZSHO	
MICH	
RECACADADE	
KILCAC MEDS	
FIZCOMPTAN 80	
Hillman Bittyitt	-
FILCHER BD	
#12.Dening tapility	
International Statements	
b statosognume	
FIZZBergenty	
Fittentment	
#12/++ 8D	
PILLUXADOBINE	
External adultation	
FIELDURING AND	
F32Crackglum CANum Seller	
Fitterstegen.com/equilit	
FILERARGARINED	
KUI-bathmenicatin	
VI2Hallblurdent	
Kitthattom Sciep	
F322hathiliteckotke	
FILIPARAKANA	
KIZ HOURD CONSTANT	

Lookup Table Definition Screen

The following security nodes do not provide a visible change in security on the **Lookup Table Definition** screen:

- Revelation.LookupDef.LookupTable
- Revelation.LookupDef.LookupTableTree
- Revelation.LookupDef.LookupTableUI

MAIL MERGE DEFINITION SECURITY

Synergy SIS > System > Setup > Mail Merge Definition is controlled by these security nodes:

- Revelation.MailMerge controls the definition, including adding or deleting.
- Revelation.MailMergeDoc controls the Mail Merge Documents grid.

Menu 🕶 🛛 ≪	9 » 😽 🕅	Undo /	Add Delete			Status: Find) G _i 🕺) @
™Mail M	lerge Definitio	n						«
Name: Type:	Default Language:							
Documents								
Name	Туре	Default La	anguage Report Na	me 🔶 👘				
		~	~					
Mail Merge D	ocuments						Add	
X Line	Language 🔤	Revision	😂 Document		Date Added	😂 User Who Added		
Mail Merge Definition Screen								

The following security node does not provide a visible change in security:

• Revelation.MailMergeUI

MAIL MERGE DISTRICT DEFINITION SECURITY

Synergy SIS > System > Setup > Mail Merge District Definition is controlled by these security nodes:

- **Revelation.MailMergeDistrict** controls the definition, including adding or deleting.
- Revelation.MailMergeDistrictDoc controls the Mail Merge Documents grid.

Menur 🔍 🛞 💭 Find Undo Add Delete S	Status: Find 😥 🖓 🏠
VMail Merge District Definition	(«
Name: Type: Default Language:	
Documents	
Name Type Default Language Report Name 🔶	
Mail Merge Documents	Add 🔇
X Line Language Q Revision Q Document Add Date Time	e Stamp 🔤

Mail Merge Definition Screen

ORGANIZATION SECURITY

The **District** tab, visible in the detail screen of **Synergy SIS > System > Setup > Organization** when the district is selected in the tree, is controlled by this security node:

Revelation.OrganizationInfo.RevOrganization

The security node **Revelation.OrganizationInfo.OrganizationTree** controls the adding and deleting of organizations.

Menu V 🥪 Save Undo	Form Status	s: Ready (Update Mode) 🛛 没 🔒
♥Organization		(«
	Action	. 3
Sample School District	Organization Name: Sample School District	
	District Special Education	
	District Setup Options	
	District Information	<u></u>
	Organization Name District Number	
	Sample School District	
	County Code	
	Address Information	
	Address	
	Address2	
	City State Zip Code + 4	
	Other Information	
	Phone Phone2	
	Website URL	
	Images	<u> </u>
	No Logo Edupoint	
	On file	
	Attach Printed Logo	
	No Logo	
	Edupoint	
	On file	
	Attach Title Image	
	No Logo	
	No Logo Edupoint	
	On file	
	Attach Login Logo	

Organization Screen

The Special Education tab is controlled by these security nodes:

- K12.Setup.SpecialEdDeptInfo controls the District Information section.
- **K12.Setup.SpecialEdIEPAppOptions** controls the IEP Referral Timeline Days field, the Medicaid Billing Agency field, and the Secondary Threshold Grade field. It also controls the Goal Library Use Need Area Instead of Subject Area checkbox and the Transfer IEP Data to AZ SAIS check box.
- **K12.Setup.SpecialEdIEPOptions** controls the Section A-B field, the Section C–D-E field, and the IEP Service Staff Disclaimer field.

♥Organization		~
	Action	• •
Sample School District	Organization Name: Sample School District	
	District Special Education	
	General	٢
	Arizona	٢
	California	٢
	National	٢
	Virginia	٢

Organization Screen Special Education Tab

The **School** tab of schools in the **Organization** screen is controlled by this security node:

School Years Spec	cial Education Documents		
School Information			
No Logo	School Name	School Code	
Edupoint	Hope High School	273	
On file	Abbr School Name		
Attach Logo			
	Principal Name +		
	User, Principal		
Address Information			<u></u>
Address			
123 Main St			
Address2			
J			
	ate ZIP Code + 4		
Phoenix Az	2 🖌 85694		
Map it!			
Other Information			
Phone Fax	Counselor De	pt Phone	
949-555-1212 949-5	55-1213		
	CTDS Code Alt Funding S	School Code	
273 12345	6273		
Website URL			
www.edupoint.com			
🔽 Live In Genesis			
Hide Organization F	rom General Use		
Alternate Information			(
Alternate District CTDS			
	Use Alternate	District CTDS	
Parent Organization			4
-	t will move this organization	n in the organization heirarchy	
Parent Organization			
3. High Schools	~		
Health Notification			4
Head Nurse Email	Safety Specialist Email		
l			

K12.School

School Tab, School-Level, Organization Screen

The **Documents** tab of schools is controlled by this security node:

Revelation.OrganizationInfo.RevOrganizationAttachDoc

Sc	hool	Years	Special Edu	ucation	Documents			
Doc	cume	nts					Add	
×	Line	Doc Date	8	Doc Cate	egory	 Doc Comment		Doc Type

Documents Tab, School-level, Organization Screen

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

- Revelation.OrganizationInfo.RevOrganizationUI
- Revelation.OrganizationInfo.RevOrganizationYear
- Revelation.OrganizationInfo.RevYear
- Revelation.OrganizationInfo.RevYearOrganization

PAGE SIZE DETAIL SECURITY

Synergy SIS > System > Setup > Page Size Detail is not controlled by any security node.

Menu V 🛞 🛞 💭 Find Undo Add Delete	Form Status: Find 🔊 🖓 🛄
	(«
Page Code: Description:	
Page Dimensions	
Page Code Description	
Width (in.)	
Height (in.)	
(iii)	

Page Size Detail Screen

PROPERTY OVERRIDE SECURITY

Synergy SIS > System > Setup Property Override is not controlled by any security node.

Property Override	
▼ K12	Current
▼ K12.AddressInfo	Туре
AddressChoice	String
AddressChoiceGrid	
AddressChoiceGridGU	Label Short Label Display Length Default Value Mandatory
AddressChoiceGU	State 2 NO
 City 	
GridGU	Override 🗳
IncomingAddressNumber	Label
SchoolName	
State	Directory in a sector
 StreetAddIncrement 	Short Label Display Length
 StreetAddress 	
StreetDirection	Default Value Mandatory
 StreetExtra 	
StreetFraction	

Property Override Screen

REVELATION MESSAGE SECURITY

Synergy SIS > System > Setup > Revelation Message is not controlled by any security node.

∀Revelation Message	(4
Message Number: 1025	
Message	
Message Number Product Owned Msg Type	
Base Message	
Msg Group Message 🕎 🛇 Help Message 🕎 🛇	
Attendance V Date Range must be inside District Calendar ((0))	
Help Link	
Message Override	٩
Message Override 🕎 📀 Help Message Override 🕎 📀	
Revelation Message Screen	

RULE GROUP SECURITY

Synergy SIS > System > Setup > Rule Group is controlled by this node:

Revelation.RuleInfo.RuleGroup

Rule Group)					(4
Group Setup						
Default Execution Time	e Default Admin Users List			Execute Now		
2:00 AM	Role - Admin					
Groups						Add 🔇
X Line	Group Name	⇔ User Group ⇔ Name	Admin Users List		Execute Time	
1 Missing Info M	essages	Role - Admin	Admin User		2:00 PM	Execute Now

Rule Group Screen

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

- Revelation.RuleInfo.RuleBatchNotification
- Revelation.RuleInfo.RuleBatchResult

RULES SETUP SECURITY

Synergy SIS > System > Setup Rules Setup is controlled by this node:

	р						(
Rule Name: New ELL	Students Category: Student E	nable Rule: Y					
Rules Setup							
Rule Name		Category	Enable Rule				
New ELL Students		Student	▼				
Rule Definition							6
Run Type	Error or Notification Ca	aused When					
Batch	🖌 All Rules are True	*					
Year Start Year End	Year Extensions						
2010	🗖 Night 🗹 Regular 🗖 Summ	er					
Batch Validation Opti	ons						6
Processing Group	Inclu	ide Validation Ei	rrors in Report	Create Person Notification			
Student Notifications	~						
Message Definition							6
Message Number 🔶							
Error Message 🕎 🥥			Help Message 🕎 📀				
			<u> </u>			<u>~</u>	
			*			-	
, Help Link			_,			_	
Rule Details							G
Rules					Add	Show Detail	
	⊖ Description						
🗙 Line Order	⇒ Description					лре	

Revelation.RuleInfo.Rule

The following sections are not controlled by the above security node, but by others.

- Revelation.RuleInfo.RuleDetail controls the Rule Details grid.
- Revelation.RuleInfo.RuleYearExtList controls the Year Extensions box.
- K12.Rules.ELLRule controls the detail of the ELL Program Rule.
- K12.Rules.ELLRuleLanguageList controls the list of languages for the ELL Program Rule.
- K12.Rules.ELLRuleProgramList controls the list of programs for the ELL Program Rule.
- K12.Rules.StudentRelatedPropertyRule controls the detail of the Student Related Property Rule.
- K12.Rules.TotalELLSemestersRule controls the detail of the Total ELL Semesters Rule.

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

- Revelation.RuleInfo.RuleUI
- K12.Rules.StudentRuleUI

Rules Setup Screen

SCHOOL SETUP SECURITY

All tabs of **Synergy SIS > System > Setup > School Setup** are controlled by this security node:

School Setup									(
School Name: Hope High Sc	:hool School Year: 2	010-2011							
Basic Info Options SIS D	ata Options 🛛 Labe	ls TeacherVUE							
Period Definition			🔇 Type Inform	ation					Q
Start Period End Period Hom	neroom Period Hom	neroom Meeting Day	School Type		Sch	ool Attendand	е Тур	e	
0 9 1		~	High School		Y Per	iod Attendance			*
			School Atter	ndance Ta	aken Sch	nool Attendan	ce Re	ason Ty	pe
			By Section		🖌 Re	gular			~
			Concurrent	Enrollmer	nt Type				
			Full Concurre	ent - Able t	to send a	nd receive conc	urrent	students	5 💌
			ALC school	Type Sch	nool Cate	gory Calenda	ir Typ	е	
				*		🔽 Regular		~	
Grade Selection	6	Grading Options		0	Roll Ov	er Defaults			Ç
Grade		Grading Period			Enter C	ode	En	iter Date	
EPSEKE01 E02E		Fourth Quarter	~		E2-First	Arizona enroll	*		P
	09 🗹 10								
▼ 11 ▼ 12 □ 12+									
Term Definition							Add		ow Detail 🔇
🗙 Line Term Number 😂		Term Name	4	🗦 Term Be	-	Term End Dat			
	Fall			08/31/2		12/20/2010	P		, Q2, YR
22 5	Spring			01/03/2	011	06/30/2011	P	YR, S2	, Q3, Q4
Track Selection									Q
Tracks									
Policy Code $\longrightarrow \bigcirc$									6
🗖 All Day Kindergarten 🗖 Wai	iting List Available								
Other Info									Ç
Exclude from State Report	ting Validate	e Student Classes							
							~		
	Improve	ement Status							
		~							
Generic Teacher Aide Cours									<u>(</u>
Course ID Course Title									
101TA Teacher Aid	From Section Credit	t 👻							
Programs									(
All students enrolled in this s	school year are in t	he	🖌 FRM pro	gram.					
Programs / Needs								Sh	ow Detail 🚳
Line Description	Offered At Sc	hool	All Students P	articipatin	g	Levels			
1 Math	Γ		v			Title I Mat	hemai	tics	
		School S	Setup Scree	n					

K12.Setup.SchoolSetup

On the **Basic Info** tab, the following sections are not controlled by the above security node, but by others:

- K12.Setup.SchoolYearTrmDef controls the Term Definition section.
- K12.Setup.SchoolYearTrmCodes controls the Term Codes grid in the detail screen of each term in the Term Definition section.
- K12.Setup.SchoolYearNeedGrid controls the Programs/Needs section.
- **K12.Setup.SchoolYearNeedGridDetail** controls the detail screen of each program in the **Programs/Needs** section.

The following security nodes do not provide a visible change in security on the **School Setup** screen:

- K12.SchoolGrade
- K12.Setup.SchoolOptionsSetup
- K12.Setup.SchoolSetupCopyGrid
- K12.Setup.SchoolSetupCopyUI
- K12.Setup.SchoolSetupTracks
- K12.Setup.SchoolSetupUI
- K12.Setup.SchoolYearTrmCodesUI
- K12.Setup.SchoolYearTrmDefTrk
- K12.Setup.SchoolYearTrmDefTrkGrid

SYSTEM CONFIGURATION SECURITY

Synergy SIS > System > Setup > System Configuration is controlled by the security node:

Revelation.OrganizationInfo.SystemConfig

VSystem Configuration	on			
System Configuration				
Security Options Advanced				
Email Options			🕥 Job Queua	e 🔉 Multi-Level Administration 📀
•	led Defa	ult Ema	ail From Address Enable	Enable
titan 🔽			upoint.com	
SMTD Dort Override default is 36		Test		
SMTP Port Override - default is 25		Test Er		
Messaging				1
🗖 Bulk Mail Enable		Γ	Immediate Email Enable	
Time to begin bulk emailing		Im	mediate Start Time Intervi	al in hours (1 to 24) to check for emails to send
E Keep History of Bulk Emails to Ea	ch Perso	n r	Keep History of Immediate E	mails to Each Person
Contact Type for Email History			Blind Copy Sender on Imme	
×			Dinia copy contact on mino.	
Default Point Of View Home Page			Tracking (۵
	POV Home	Page	Track User Login Attempt	
Home Screen	POVINUINE	raye		
Password Security Options	_			
Minimum password length	characte	rs. (Le:	ave blank for no limitation)	
Number of days before password ex	pires 🗌	(Leave blank for no expiration)
				,
Require both alpha and numeric cha	iracters t		in the password	
Force uniqueness of passwords up t	:0	histo	rical passwords. (Leave blank	k for no uniqueness check)
Force uniqueness of passwords up t	:0	num	nber of days. (Leave blank for	r no date uniqueness check)
	1			
Number of invalid login attempts before			·	for unlimited attempts)
NOTE: To enable a disabled	l user aci	count g	to the User view and clear t	the disabled checkbox.
Default Entry Access Times			1	Ç
Line Day Of Week	Enabled			
			De via	Access Time Period
			Begin	Access Time Period End
1 Monday	Yes	~	Begin	
1 Monday 2 Tuesday	Yes Yes	*	Begin	
1 Monday 2 Tuesday 3 Wednesday	Yes Yes Yes	*	Begin	
1 Monday 2 Tuesday 3 Wednesday 4 Thursday	Yes Yes	* *	Begin	
1 Monday 2 Tuesday 3 Wednesday	Yes Yes Yes Yes	* *	Begin	
1 Monday 2 Tuesday 3 Wednesday 4 Thursday	Yes Yes Yes Yes Yes	* * *	Begin	
1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday	Yes Yes Yes Yes Yes Yes	* * * *	Begin	
Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday	Yes Yes Yes Yes Yes Yes	× × × × ×	Begin	
1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentication	Yes Yes Yes Yes Yes Yes Yes	Y Y Y Y	Begin	
Monday Tuesday Vednesday Thursday Friday Friday Saturday Sunday Pass Through Authentication Allow pass through authentication	Yes Yes Yes Yes Yes Yes Yes	Y Y Y Y	Begin	End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Saturday Sunday	Yes Yes Yes Yes Yes Yes Yes	• • • • • •		End End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Sunday Pass Through Authentication Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type	Yes Yes Yes Yes Yes Yes Tor login		n Type - Higher levels include	End
1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentication Allow pass through authentication Integration Jsing LDAP LDAP Server Type	Yes Yes Yes Yes Yes Yes Tor login		1 Type - Higher levels include Jsers and Synchronize User Gro	End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Sunday Pass Through Authentication Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type Domain Name	Yes Yes Yes Yes Yes Yes Tor login		n Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m	End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type Domain Name xnovahq	Yes Yes Yes Yes Yes Yes Tor login		Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m LDAP://az3.xnova.com	End End End Secured via SSL
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Rest Strongh Authentication Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type Ormain Name xnovahq You must enter in an LDAP user p	Yes Yes Yes Yes Yes Yes Yes Yes Tor login	v v v v v v v v v v v v v v v v v v v	n Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m LDAP://az3.xnova.com sure matching of LDAP use	End End End Secured via SSL
1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday 7 Sunday 7 Sunday 7 Sunday 9 Allow pass through authentication Image: Allow pass through authentication Image: Allow pass through authentication Jsing LDAP LDAP Server Type Image: Allow pass through authentication Domain Name Xnovahq You must enter in an LDAP user pased single value target single value	Yes Yes Yes Yes Yes Yes Tor login	v v v v v v v v v v v v v v v v v v v	1 Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m [LDAP://az3.xnova.com sure matching of LDAP use escription, info, etc.). The	End
Monday Image: Monday Image: Monday Image: Monday Wednesday Image: Monday Friday Saturday Saturday Saturday Saturday Saturday Saturday Saturday Sunday Pass: Through Authentication Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type Ommain Name xnovahq You must enter in an LDAP user pamed single value LDAP user p Badge Number property. WARNING: This property must be	Yes Yes Yes Yes Yes Yes Tor login	v v v v v v v v v v v v v v v v v v v	1 Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m [LDAP://az3.xnova.com sure matching of LDAP use escription, info, etc.). The	End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Saturday Rest Through Authentication Allow pass through authentication LDAP Integration Jsing LDAP LDAP Server Type Domain Name xnovahq You must enter in an LDAP user p Badge Number property. WARNING: This property must be	Yes Yes Yes Yes Yes Yes Tor login	v v v v v v v v v v v v v v v v v v v	1 Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m [LDAP://az3.xnova.com sure matching of LDAP use escription, info, etc.). The	End
 Monday Tuesday Tuesday Wednesday Thursday Friday Saturday Saturday Saturday Sunday Pass Through Authentication Allow pass through authentication Using LDAP LDAP Server Type Domain Name Xnovahq You must enter in an LDAP user p Badge Number property. 	Yes	y to en (e.g. d	Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m DAP://az3.xnova.com sure matching of LDAP use escription, info, etc.). The students if Students exist in	End
Monday Image: Monday Tuesday Wednesday Thursday Friday Saturday Friday Saturday Sunday Pass Through Authentication Allow pass through authentication Allow pass through authentication Joing LDAP LDAP Server Type Domain Name xnovahq You must enter in an LDAP user padge Number property. WARNING: This property must be user Property User Property In order to provide the ability to	Yes	v v v v s s egration Create L v v to en (e.g. d or all S eate st	Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m LDAP://a23.xnova.com sure matching of LDAP use escription, info, etc.). The itudents if Students exist i	End
Monday Monday Zuesday Wednesday Thursday Friday Saturday Friday Saturday Sunday Pass Through Authentication Allow pass through authentication Allow pass through authentication Jsing LDAP LDAP Server Type Domain Name xnovahq You must enter in an LDAP user p Badge Number property. WARNING: This property must be User Property In order to provide the ability to Type must specified. The expect	Yes	v v v v v v v v v v v v v v v v v v v	Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m [LDAP://az3.nova.com sure matching of LDAP us- escription, info, etc.). The itudents if Students exist i aff and staff school year er AP is the role code (lookuj	End
1 Monday 2 Tuesday 3 Wednesday 4 Thursday 5 Friday 6 Saturday 7 Sunday Pass Through Authentication Image: Allow pass through authentication Allow pass through authentication Jsing LDAP LDAP Server Type Image: Domain Name xnovahq You must enter in an LDAP user party Badge Number property. WARNING: This property must be Jser Property In order to provide the ability to Type must specified. The expect Role Property Staff Type:	Yes	v v v v v v v v v v v v v v v v v v v	Type - Higher levels include Jsers and Synchronize User Gro Server Path (e.g. LDAP://m LDAP://a23.xnova.com sure matching of LDAP use escription, info, etc.). The itudents if Students exist i	End

The security node **Revelation.OrganizationInfo.UserTimeEntryGrid** controls the **Default Entry Access Times** grid.

TASK DEFINITION SECURITY

Synergy SIS > System > Setup > Task Definition is controlled by the following security node:

Task Definition Task Process Task Executior 2:00 AM Run Task Process Immediately Options Generate Task For Entire Day If Generate Task For Entire Day is selected then the task list will be built for the entire day. This is applicable only if the user clicks Run Task Process Immediately. Task Definition Task Definition Module 🕎 🔇 Health * ~ K12.Healthinfo.Health Health K12.HealthInfo.TaskInfo.HealthIncidentTaskInfo Manual 🕎 🔮 Conference Student V K12.ConferenceInfo.Student Conference K12.ConferenceInfo.TaskInfo.StudentConferenceTaskInfo Manual 🕎 🛇 Discipline Incident 7 K12.DisciplineInfo.StudentIncidentDiscipline K12.DisciplineInfo.TaskInfo.StudentDisciplineIncidentTaskInfo Manual 🕎 🔇 Medication * V Health K12.HealthInfo.Medication Monitor K12.HealthInfo.TaskInfo.StudentMedicationTaskInfo Automatic 🕎 🔇 PVUE PVUE 7 K12.PXP.Review PVUE Updates K12.PXP.Taskinfo.ParentVUEChangeTaskinfo Automatic Task Definition Screen

Revelation TaskDefGrid

The following security nodes do not provide a visible change in security on the **Task Definition** screen:

- Revelation.Task
- Revelation TaskDef
- Revelation TaskDefClt
- Revelation TaskDefUI

SIF TRANSACTION HISTORY SECURITY

Synergy SIS > System > SIF > SIF Transaction History is not controlled by any security node.

Menu 🗸 🔇 🛞 🛛 🏹 🛛 Find Undo	Add Delete		Form Status: Find 🛛 😂 🖓 🚣
✓SIF Transaction History			~
SIF Object: Processing Start Time: Processing Finish Tim	e:		
SIF Transactions			
SIF Object	Time Received	Processing Start Time	
Transaction Data			0
Transaction XML 📀			
			<u>*</u>
			V
Transaction Status			
Processing Finish Time State			
Error Result 🥥			
			<u> </u>
			T

SIF Transaction History Screen

The following security nodes do not provide a visible change in security on the **SIF Transaction History** screen:

- K12.SIFStudent
- Revelation.SIFInfo.SIF
- Revelation.SIFInfo.SIFObjectBOXref
- Revelation.SIFInfo.SIFTransaction

USER SECURITY

The **Demographics** tab of **Synergy SIS > System > User > User** is controlled by this security node:

K12.SystemInfo.SISUser

This security node also controls some of the **Organizations** tab and some of the **POV** tab.

User Name: User, New Demographics Organizations User Groups Navigation Menu Security Settings Focus Spell Check POV Last Name First Name Middle Name Disabled User Type User New C Staff Confirm Password Dates Confirm Password User Creation Date D6/19/2011 23:59:44 Last Login Cexempt Force Password Confirm Password Confirm Password Confirm Password D6/19/2011 23:59:44 Last Login Date Cexempt Form LDAP Address Preferences Password Password Password Password Password Password Password Password Password Preferences Password Passw	∀User						~
Last Name First Name Middle Name Disabled User Type User New Login Login Password Password O Dates User Creation Date D6/19/2011 23:59:44 Last Login Force Password Change On Next Login Exempt From LDAP	User Name: User	r, New					
Login Name Email () Password Confirm Password User Creation Date newuser newuser@edupoint.com 06/19/2011 23:59:44 Last Login Date Force Password Change On Next Login Exempt From LDAP Last Login Date	Last Name	First Name		ame Disabled User Type		ck POV	
Force Password Change On Next Login Exempt From LDAP	⊢ •	Email 😥	٩			-	
Address O Preferences O	Force Passwo	ord Change On Next Login				P	
Address Default Mode Paging Size Paging Row Size City State ZIP Code + 4 Show Quick Launch Debug Expiration (Hours from Now) O POV Home Page Change POV Home Page	Address	State ZIP Code + 4		Default Mode Paging Siz	from Now)		
Phone Numbers Add X Line Primary Type Phone Extension Contact Listed				hono 🛆 Eutonoi	an 🛆 Conta		

Demographics Tab, User Screen

The Organizations tab of the User screen is controlled by the security nodes:

- Revelation.UserInfo.RevUserExtLst controls the Year Extensions section.
- K12.SystemInfo.SISUser controls the Access Permissions section. This node also controls the Demographics tab and POV tab.
- Revelation.UserInfo.RevUserOrganizations controls the Organizations grid.

VUser	(«
User Name: User, New	
Demographics Organizations User Groups Navigation Menu Security Settings Focus Spell Check POV	
Last Name First Name Middle Name Disabled User Type	
User New 🗖 Staff 👻	
Year Extensions	(
Possible Year Extensions	
Night 🗖 Regular 🗖 Summer	
Access Permissions	(
Previous Year(s) Current Year Next Year(s) Non Year	
Organizations	Chooser 🔇 🔕
X Line Organization Name Qrganization Update	¢
Organizations Tab, User Screen	

The **User Groups** tab of the **User** screen is controlled by this security node:

K12.SystemInfo.SISUserUserGroup

ΨU	lser													«
User N	Name: Use	er, New												
Demo	ographics	Organizations	User Groups	Navigation M	enu Se	curity Settii	ngs	Focus	Spell Cł	eck	POV			
Last N	lame	First N	Vame	Middle Name	Disable	d User Ty	pe							
User		New				Staff	~							
Point	t Of View H	lome For User (Group											٩
POV l	Usergroup]												
User	Groups											C	hooser	
X	Line		User Group Na	me		Ş			Use Me	nu Gr	oup			\Rightarrow
	1 Role	- Genesis User												
	2 Role	- Nurse												

User Groups tab, User Screen

The Navigation Menu tab of the User screen is not controlled by any security nodes.

∀User						(«
User Name: User	, New					
Demographics	Organizations User Groups	Navigation Menu	Security Settings	Focus Spell Check	k POV	
Last Name	First Name	Middle Name Disa	ibled User Type			
User	New	1	🗌 Staff 🕑			
Navigation Men	u					Action 🔽 🔇

Navigation Menu Tab, User Screen

The Security Settings tab of the User screen is controlled by these security nodes:

- K12.SystemInfo.User controls everything but the Default Entry Access Times grid.
- K12.SystemInfo.UserTimeEntryGrid controls the Default Entry Access Times grid.

Jser Name: Use	r, New				
Demographics	Organizations User (Froups Navig	ation M	Menu Security Settings Focus Spell Check POV	
_ast Name	First Name	Middle			
User	New			T Staff 💌	
Discipline			۵	Conference	
Discipline Secur	ity			Conference Visitation	
	~			×	
Discipline Orgar	nization Security			Student Enrollment History	
		~		Student Enrollment Organization Security	
Scheduling			0	Special Education	
Allow Override o	of Max Students in Clas	s 👻		Exempt From Student Team	
				×	
				Systemwide Case Manager	
				×	
Other			۵	Grade Book	
🗖 Show BO On	Mouseover			Grade Book Security	
Teacher//UE Ad	Iministrator 🗸				
Edmini (LE Lloor					
		1		Access Time Derind	¢
	ccess Times	Enabled	Be	Access Time Period	¢
Default Entry Ac	ccess Times	Enabled	Be	Access Time Period egin End	Ŷ
Default Entry Ad Line Day of Weel 1 Monday	ccess Times	Enabled	Be		(
Default Entry Ad Line Day of Weel 1 Monday 2 Tuesday	ccess Times	~	Be		(
Default Entry Ac Line Day of Weel 1 Monday 2 Tuesday 3 Wednesday	ccess Times	~	Be		
Default Entry Ad Line Day of Weel Monday 2 Tuesday 3 Wednesday 4 Thursday	ccess Times		Be		
1 Monday 2 Tuesday 3 Wednesda	ccess Times		Ber		

Security Setting Tab, User Screen

The Focus tab of the User screen is not controlled by any security nodes.

⊽User							~
User Name: User	, New						
Demographics	Organizations User Grou	ps Navigation Me	nu Security Setting:	Focus	Spell Check	POV	
Last Name	First Name	Middle Name	Disabled User Type				
User	New		🗖 Staff	~			
Focus Year Selec	tion Show Inact	ive Students					
	🔽 Active Only	~					
Focus Organizati	ion						<u></u>
Edupoint School	l District						

Focus Tab, User Screen

The Spell Check tab of the User screen is controlled by this security node:

VUser												(«
User Name: Use	r, New											
Demographics	Organizations	User Groups	Navigation Me	nu Secu	irity Setti	ngs	Focus	Spell (Check	POV		
Last Name	First N	ame	Middle Name	Disabled	User Ty	/pe						
User	New				Staff	*						
Options												۵
🔽 Ignore All-Ca	pital Words		🔽 Ignore Mixed	-Digit Woi	rds		🔽 lg	nore Fil	ename	s		
🔽 Ignore First-(Capital Words		🔽 Ignore Hypha	enated Wo	ords		🔽 lg	nore Ht	ml Tag	s		
🔽 Ignore Mixed	-Capital Words		🔽 Ignore Repe	at Words			🔽 lg	nore Int	ernet /	Addres	ses	
Custom Word L	ist										Add	
X Line Word												

Revelation.UserInfo.RevUserCustomDict

Spell Check Tab, User Screen

The **POV** tab of the **User** screen is controlled by these security nodes;

- K12.SystemInfo.SISUser controls the Dashboard Controls Per Row field and the Show Task List list. This node also controls the Demographics tab and some of the Organizations tab.
- Revelation.UserInfo.RevUserTaskLst controls the Task Module section.
- Revelation.UserInfo.UserDashboardWidget controls the Dashboard Controls grid.

VUser									«
User Name: Use	r, New								
Demographics	Organizations	User Groups	Navigation Me	enu Security S	ettings Focus	Spell Check	POV		
Last Name	First Na	ime	Middle Name	Disabled User	Туре				
User	New			🗖 🗖 Staff	~				
Point of View (F	POV) Home Page	Settings							٨
Dashboard Con	trols Per Row								
Dashboard Con	trols						A	dd Choos	er 🔕
X Line C	Orderby 🍦	Name	⊜ Graph	hType 🔤	Widget ID	Ş	Last Update	Date Time	\bigcirc
Task Setup									0
Show Task List									
No 🔽									
Task Module									
🗖 Electronic St	tudent Record 🗖	Health 🗖 Ir	icident Disciplin	e 🗖 PVUE Upda	te 🗖 Student				
1				V/Teh Llee	~				



The following security nodes do not provide a visible change in security on the **User** screen:

- K12.Setup.UserFindList
- K12.Setup.UserFindSelect
- K12.SystemInfo.UserPasswordUI
- K12.SystemInfo.UserPreferencesUI
- Revelation.UserInfo.RevUser
- Revelation.UserInfo.RevUserNoDefault
- Revelation.UserInfo.RevUserPassword
- Revelation.UserInfo.RevUserPerformance
- Revelation.UserInfo.RevUserReportPreferences
- Revelation.UserInfo.RevUserUI
- Revelation.Navigation.MenuTree
- Revelation.Navigation.MenuUsrTree
- Revelation.Navigation.MenuGroup
- Revelation.Navigation.MenuGroupItem
- Revelation.Navigation.MenuGroupUsr
- Revelation.Navigation.MenuGroupUsrItem
- Revelation.OrganizationInfo.UserFocusConfig

USER GROUPS SECURITY

The **Members** tab of **Synergy SIS > System > User > User Groups** is controlled by these security nodes:

- K12.SystemInfo.SISUserGroup controls the User Group Name. This security node also controls part of the Organizations tab, the Options tab, and part of the POV tab.
- K12.SystemInfo.SISUserGroupUser controls the Members grid.

VUser Groups		6
User Group Name: Role - Nurse		
Members Organizations Navigation Menu Options Security Settings POV		
User Group Name Name of user group in LDAP (if synching with LDAP)		
Role - Nurse Nurses		
Members	Chooser	٢
X Line User Name Focus Email \bigcirc Login Name \bigcirc \bigcirc \bigcirc \bigcirc \bigcirc \bigcirc	Disabled	10
r Line User Name Erman ⊂ Lugin Name ⊂ Organization	Disabled	
User, Test test@edupoint.com test Hope High School 2010-R		

User Groups Screen

The **Organizations** tab is controlled by these security nodes:

- Revelation.UserInfo.RevUserGroupExtLst controls the Year Extensions section.
- K12.SystemInfo.SISUserGroup controls the Access Permissions section and the Virtual Organization Settings section.
- Revelation.UserInfo.RevUserGroupOrganization controls the Organizations grid.

VUser Groups	«
User Group Name: Role - Nurse	
Members Organizations Navigation Menu Options Security Settings POV	
User Group Name Name of user group in LDAP (if synching with LDAP)	
Role - Nurses	
Year Extensions	٩
Possible Year Extensions	
🗖 Night 🗖 Regular 🗖 Summer	
Access Permissions	٩
Previous Year(s) Current Year Next Year(s) Non Year	
· · · · · · · · · · · · · · · · · · ·	
Allow LDAP monitoring to create staff school year entries for specific school organizations listed below.	
NOTE: Organizations above the school level will not be evaluated.	
Organizations	iser 🔕
X Line Organization Name Image: Constraint of the second seco	\Leftrightarrow
Virtual Organization Settings	٩
Virtual Root Node	
Allow Lower Virtual Node Users to Modify Member List	

Organizations Tab, User Groups Screen

The Navigation Menu tab is not controlled by any security node.

∀User Groups		«
User Group Name: Role - Nurse		
Members Organizations Navigation Mer	nu Options Security Settings POV	
Role - Nurse		
Select a user whose default saved report se	ettings are used for report execution +	
NOTE: Currently, the default report prefere	nces user for a group is only impelmented in TXP. added to this group	
Navigation Tree	Action	٢
▶ <u>Health</u>	Set Group Order X Line Name I Health Move Up Move Down	

Navigation Menu Tab, User Groups Screen

The **Options** tab is controlled by this security node:

K12.SystemInfo.SISUserGroup

This security node also controls the group name, a section on the **Organizations** tab, and part of the **POV** tab.

[™] User Groups	«
User Group Name: Role - Nurse	
Members Organizations Navigation Menu Options Security Settings POV	
User Group Name Ldap Name	
Role - Nurse	
Point Of View Home Page	0
POV Home Page	
Change POV Home Page	
Please Select a page for the user to log into	0
Login Page Allow Dual Login	
Ontione Teh Lleer Creune Sereen	

Options Tab, User Groups Screen

The Security Settings tab is controlled by these security nodes:

- K12.SystemInfo.UserGroup controls everything but the Default Entry Access Times grid.
- Revelation.UserInfo.GroupUserAccessGrid controls the Default Entry Access Times grid.

User Group Name: Role - Nurse				
Members Organizations Navigat	tion Menu Options S	ecurity Set	tings POV	
Jser Group Name			roup in LDAP (if synching with LDAP)	
Role - Nurse	Nurs	ses		
Discipline		۵	Conference	
Discipline Security Discipline Orga	nization Security		Conference Visitation	
~	~		×	
			Student Enrollment History	
			Student Enrollment Organization Security	
			×	
Scheduling		٨	Special Education	
Allow Override of Max Students in (Class 🗸		Exempt From Student Team	
Other			×	
	A starting of the start	_	Systemwide Case Manager	
	AdminVUE User	*		
			×	
			Grade Book	
TeacherVUE Administrator			Grade Book Grade Book Security	
			Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor		 m	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to) regain access	m	Grade Book Security	
User Session State Management Tirre, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor) regain access re all child windows are		Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to) regain access re all child windows are		Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not comr to a login screen) regain access re all child windows are mitted and user is returr		Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not com to a login screen Exclude From PAD and BO Sect) regain access re all child windows are mitted and user is returr		Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not comm to a login screen Exclude From PAD and BO Sect Default Entry Access Times	o regain access re all child windows are mitted and user is return urity Views		Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not com to a login screen Exclude From PAD and BO Secu) regain access re all child windows are mitted and user is returr	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not comm to a login screen Exclude From PAD and BO Sect Default Entry Access Times	o regain access re all child windows are mitted and user is return urity Views	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not comr to a login screen Exclude From PAD and BO Sect Default Entry Access Times Line Day or Week	o regain access re all child windows are mitted and user is return urity Views Enabled Beg	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not com Exclude From PAD and BO Sect Default Entry Access Times Line Day of Week Monday	e regain access re all child windows are mitted and user is return unity Views Enabled Beg	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not comr to a login screen Exclude From PAD and BO Sect Default Entry Access Times Line Day of Week Monday Tuesday	r regain access re all child windows are mitted and user is return urity Views	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not com Exclude From PAD and BO Sect Default Entry Access Times Line Default Entry Access Times Line Data of Week 1 Monday 2 Tuesday 3 Wednesday	regain access re all child windows are mitted and user is return unity Views	ned	Grade Book Security	
User Session State Management Time, in minutes, of inactivity befor and will require the user to login to Time, in minutes, of inactivity befor closed, pending changes not come to a login screen Exclude From PAD and BO Sect Default Entry Access Times Line Day of Week Monday 2 Tuesday 3 Wednesday 4 Thursday	regain access re ail child windows are reading to the second	ned	Grade Book Security	

Security Settings Tab, User Groups Screen

The **POV** tab screen is controlled by these security nodes:

- **K12.SystemInfo.SISUserGroup** controls everything but the **Task Module** section. This node also controls the group name, a section on the **Organizations** tab, and the **Options** tab.
- Revelation.UserInfo.RevUserGroupTaskLst controls the Task Module section.

VUser										
User Name: Us e	er, New									
Demographics	Organizations	User Group	s Navigation M	1enu Security S	Settings Focus	Spell Check	POV			
Last Name	First 1	Vame	Middle Name	Disabled User	r Type					
User	New			🗖 🗖 Staf	ff 🔽					
Point of View ((POV) Home Pag	ge Settings								(
Dashboard Coi	ntrols Per Row									
Dashboard Cor	ntrols							Add	Chooser	6
	Orderby 🔶	Name	🔶 Grap	ohType 🔶	Widget ID	♦	Last Upr	date Date Ti	me	
X Line										(
X Line Task Setup										
Task Setup	t									
Task Setup Show Task List No ·	•			ne 🗖 PVUE Upda						

POV Tab, User Groups Screen

The following security nodes do not provide a visible change in security on the **User Groups** screen:

- K12.SystemInfo.MassChangeUserGroup
- Revelation.UserInfo.RevUserGroup
- Revelation.UserInfo.RevUserGroupUser
- Revelation.UserInfo.RevUserUserGroup

SYSTEM REPORTS SECURITY

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